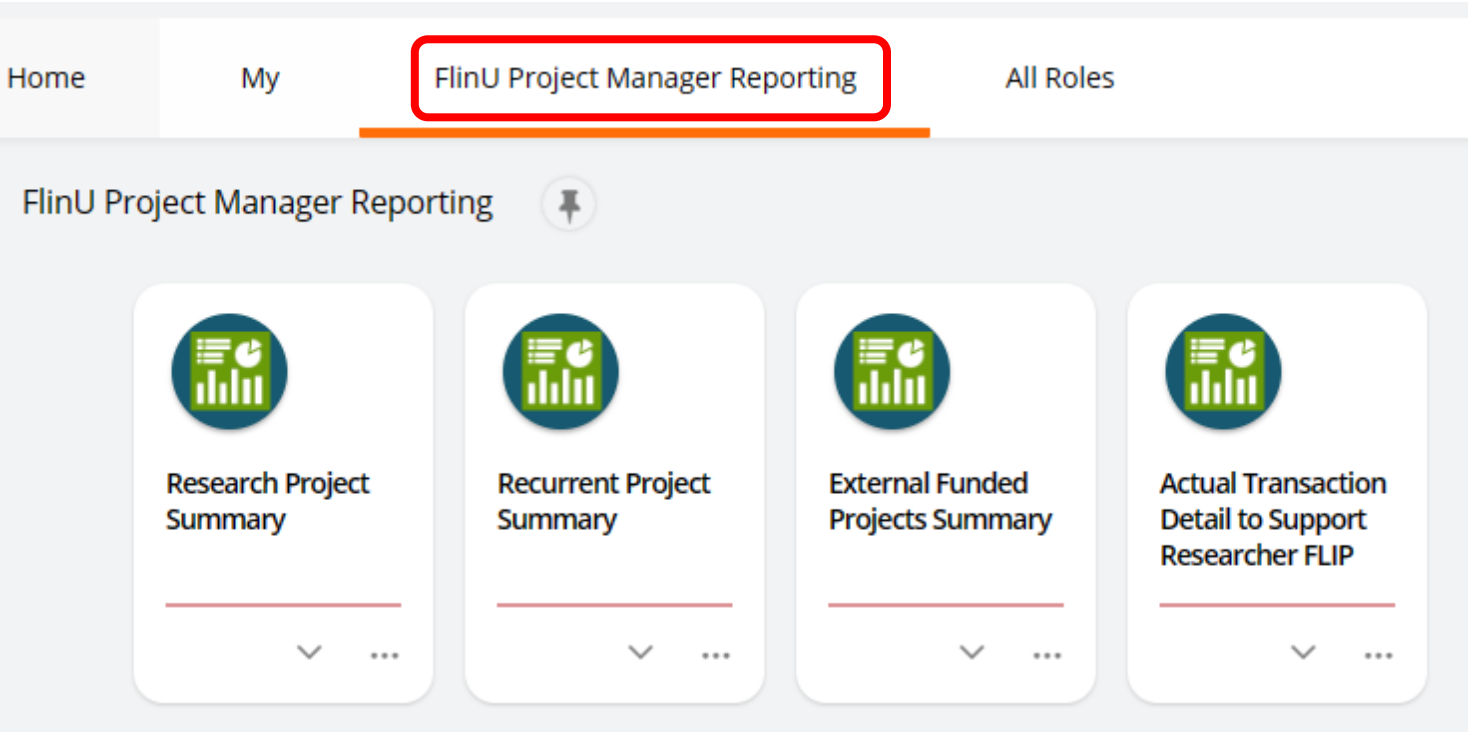
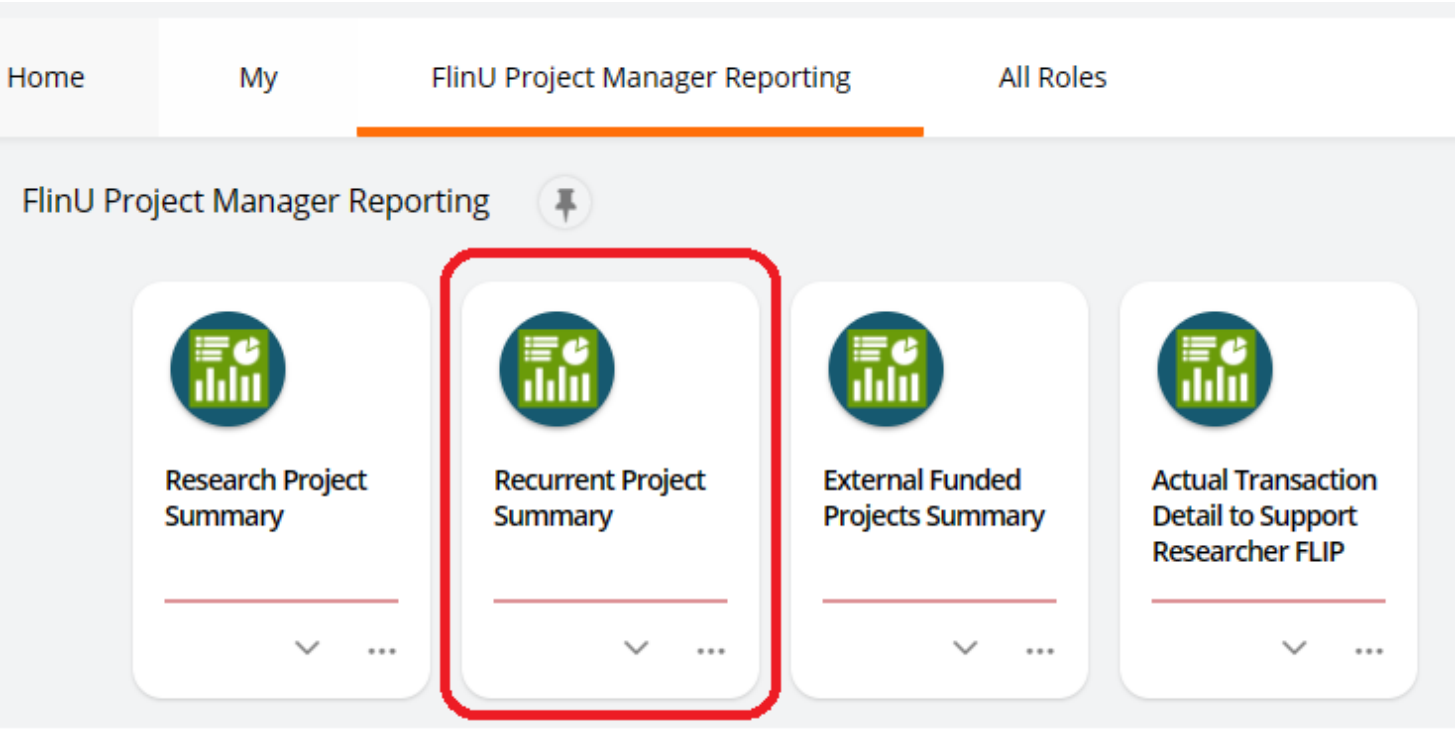
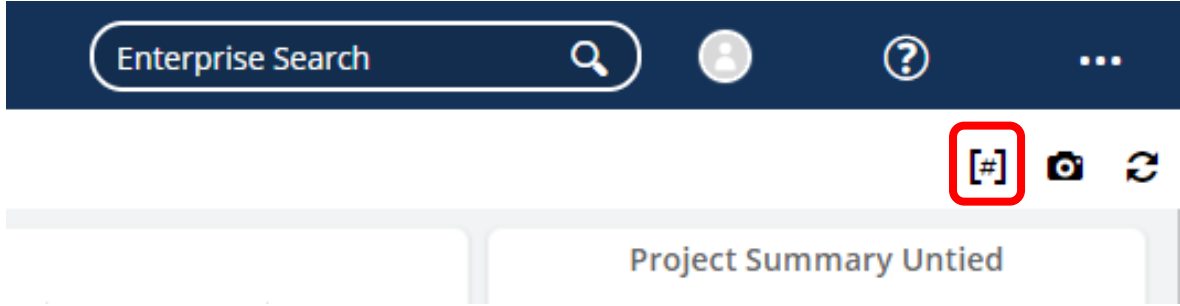
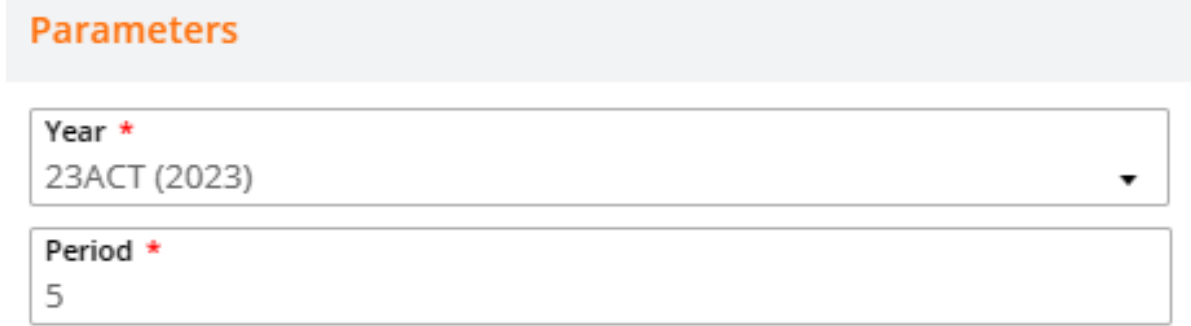



#	Task	Description
1	Locating a dashboard	<p>Note: To access the Business Analytics dashboards, you will require 'FlinU Project Manager Reporting' role in TechOne</p> <p>You can locate several Business Analytics Dashboards by navigating to the 'FlinU Project Manager Reporting' Role in TechOne.</p> 

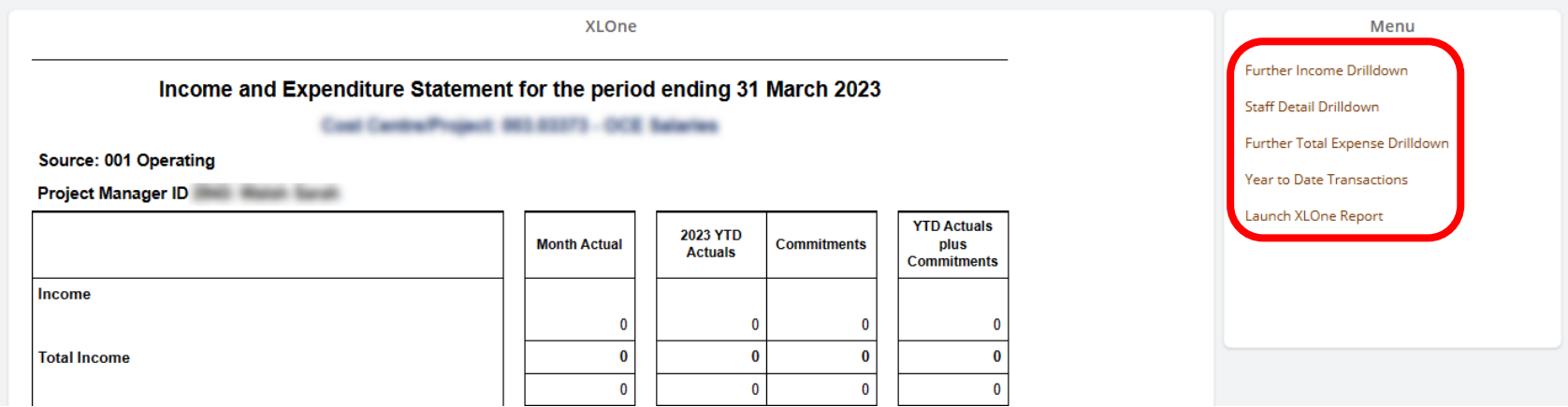
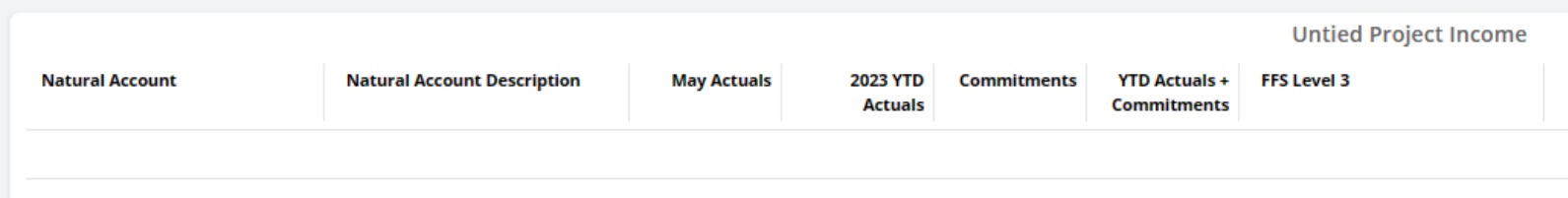
#	Task	Description
2	Click on relevant dashboard	<p>Click on the dashboard you want to open. In this instance the 'Recurrent Project Summary' dashboard is selected.</p> 


#	Task	Description
3	View 3 x visualisation options	<p>This Dashboard contains 3 grids of data for you to view (visualisations), as displayed below:</p> <ol style="list-style-type: none"> 1. Project Summary Untied 2. Project Summary Untied Uniwide 3. Accounts Receivable Invoices Summary (Note: you will need to scroll down to view the data under this option).

#	Task	Description
4	Open dashboard parameters	<p>To access the Dashboard parameters, click on the (#) icon at the top RHS of page.</p> 
5	Enter applicable year & period	<p>Enter the applicable Year and Period parameters, to query data from the current YTD or a previous year.</p> 

#	Task	Description																																																																																																																																															
6	Project data displayed based on parameters selected	<p>The data displayed shows the income and expense positions of all the projects accessible to you under your user profile. In this instance the 'Project Summary Untied' visualisation is displaying YTD data.</p> <p>Note: Your personal view will differ from what you see below, depending on your user profile.</p> <table border="1"> <caption>Project Summary Untied</caption> <thead> <tr> <th>Cost Centre/Project</th> <th>Project</th> <th>Project Description</th> <th>Uni Source Description</th> <th>Uni Source</th> <th>Fund type Description</th> <th>Carry Forward Balance</th> <th>Income</th> <th>Expenses</th> <th>Commitments</th> <th>Balance</th> </tr> </thead> <tbody> <tr> <td>0011200</td> <td>1200</td> <td>University Strategic Fund USF</td> <td>University Strategic Fund USF</td> <td>125</td> <td>Operating Untied</td> <td>0</td> <td>0</td> <td>0</td> <td>121,403</td> <td>(121,403)</td> </tr> <tr> <td>0010000</td> <td>0000</td> <td>University Strategic Fund USF</td> <td>University Strategic Fund USF</td> <td>125</td> <td>Operating Untied</td> <td>0</td> <td>0</td> <td>0</td> <td>367,871</td> <td>(367,871)</td> </tr> <tr> <td>0010000</td> <td>0000</td> <td>Operating</td> <td>Operating</td> <td>001</td> <td>Operating Untied</td> <td>0</td> <td>0</td> <td>934</td> <td>0</td> <td>(934)</td> </tr> <tr> <td>0010070</td> <td>0070</td> <td>Operating</td> <td>Operating</td> <td>001</td> <td>Operating Untied</td> <td>0</td> <td>0</td> <td>34,216</td> <td>2,157,945</td> <td>(2,192,161)</td> </tr> <tr> <td>0010100</td> <td>0100</td> <td>Operating</td> <td>Operating</td> <td>001</td> <td>Operating Untied</td> <td>0</td> <td>0</td> <td>0</td> <td>(1,470)</td> <td>1,470</td> </tr> <tr> <td>0010070</td> <td>0070</td> <td>Operating</td> <td>Operating</td> <td>001</td> <td>Operating Untied</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> </tr> <tr> <td>0010000</td> <td>0000</td> <td>University Strategic Fund USF</td> <td>University Strategic Fund USF</td> <td>125</td> <td>Operating Untied</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> </tr> <tr> <td>0010000</td> <td>0000</td> <td>(URB) University Research Bu...</td> <td>(URB) University Research Bu...</td> <td>009</td> <td>Research Untied</td> <td>(323)</td> <td>323</td> <td>0</td> <td>0</td> <td>0</td> </tr> <tr> <td>0011200</td> <td>1200</td> <td>University Strategic Fund USF</td> <td>University Strategic Fund USF</td> <td>125</td> <td>Operating Untied</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> </tr> <tr> <td>0010000</td> <td>0000</td> <td>Operating</td> <td>Operating</td> <td>001</td> <td>Operating Untied</td> <td>0</td> <td>0</td> <td>3,459</td> <td>0</td> <td>(3,459)</td> </tr> <tr> <td>0010000</td> <td>0000</td> <td>Operating</td> <td>Operating</td> <td>001</td> <td>Operating Untied</td> <td>0</td> <td>0</td> <td>110,898</td> <td>1,594,968</td> <td>(1,705,866)</td> </tr> <tr> <td colspan="6"></td> <td>(22,068,728)</td> <td>(74,644,867)</td> <td>127,575,807</td> <td>948,986,184</td> <td>(979,848,396)</td> </tr> </tbody> </table>	Cost Centre/Project	Project	Project Description	Uni Source Description	Uni Source	Fund type Description	Carry Forward Balance	Income	Expenses	Commitments	Balance	0011200	1200	University Strategic Fund USF	University Strategic Fund USF	125	Operating Untied	0	0	0	121,403	(121,403)	0010000	0000	University Strategic Fund USF	University Strategic Fund USF	125	Operating Untied	0	0	0	367,871	(367,871)	0010000	0000	Operating	Operating	001	Operating Untied	0	0	934	0	(934)	0010070	0070	Operating	Operating	001	Operating Untied	0	0	34,216	2,157,945	(2,192,161)	0010100	0100	Operating	Operating	001	Operating Untied	0	0	0	(1,470)	1,470	0010070	0070	Operating	Operating	001	Operating Untied	0	0	0	0	0	0010000	0000	University Strategic Fund USF	University Strategic Fund USF	125	Operating Untied	0	0	0	0	0	0010000	0000	(URB) University Research Bu...	(URB) University Research Bu...	009	Research Untied	(323)	323	0	0	0	0011200	1200	University Strategic Fund USF	University Strategic Fund USF	125	Operating Untied	0	0	0	0	0	0010000	0000	Operating	Operating	001	Operating Untied	0	0	3,459	0	(3,459)	0010000	0000	Operating	Operating	001	Operating Untied	0	0	110,898	1,594,968	(1,705,866)							(22,068,728)	(74,644,867)	127,575,807	948,986,184	(979,848,396)
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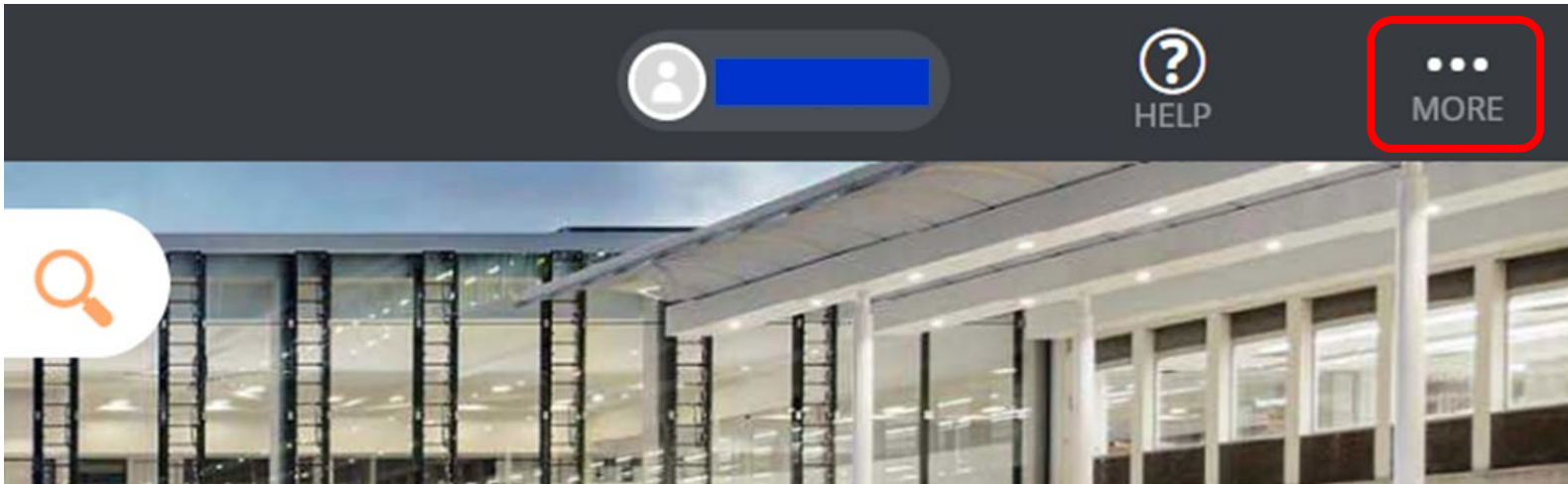
#	Task	Description
7	Click on Project link to view more detail	<p>You can click on the links in the 'Project' column for a more detailed view of your project.</p>  <p>Note: Active links are identifiable in a different colour. You can customise the colour scheme, depending on your chosen Theme. See Appendix A for instructions on how to modify your Theme.</p>
8	View the Project Detail dashboard	<p>You are now viewing the 'Untied Project Detail' dashboard, which provides a more detailed view of your project. From here you can click on additional links on the RHS of the page to view further information.</p> <p>Note: The additional links provide options to either view another dashboard or an enquiry, or launch an XLOne Report. See examples in task #9.</p>

#	Task	Description																					
		<p>Untied Project Detail</p>  <p>XLOne</p> <p>Income and Expenditure Statement for the period ending 31 March 2023</p> <p>Cost Centre/Project: 001-00010 - OCE Salaries</p> <p>Source: 001 Operating Project Manager ID: 0001-0001-0001</p> <table border="1"> <thead> <tr> <th></th> <th>Month Actual</th> <th>2023 YTD Actuals</th> <th>Commitments</th> <th>YTD Actuals plus Commitments</th> </tr> </thead> <tbody> <tr> <td>Income</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> </tr> <tr> <td>Total Income</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> </tr> <tr> <td></td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> </tr> </tbody> </table> <p>Menu</p> <ul style="list-style-type: none"> Further Income Drilldown Staff Detail Drilldown Further Total Expense Drilldown Year to Date Transactions Launch XLOne Report 		Month Actual	2023 YTD Actuals	Commitments	YTD Actuals plus Commitments	Income	0	0	0	0	Total Income	0	0	0	0		0	0	0	0	
	Month Actual	2023 YTD Actuals	Commitments	YTD Actuals plus Commitments																			
Income	0	0	0	0																			
Total Income	0	0	0	0																			
	0	0	0	0																			
9	Example of different display methods	<p>If you click the 'Further Income Drilldown' link, you will see the following summary:</p> <p>Untied Project Income</p>  <table border="1"> <thead> <tr> <th colspan="7">Untied Project Income</th> </tr> <tr> <th>Natural Account</th> <th>Natural Account Description</th> <th>May Actuals</th> <th>2023 YTD Actuals</th> <th>Commitments</th> <th>YTD Actuals + Commitments</th> <th>FFS Level 3</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Untied Project Income							Natural Account	Natural Account Description	May Actuals	2023 YTD Actuals	Commitments	YTD Actuals + Commitments	FFS Level 3							
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#	Task	Description																																																		
		<p>If you click on the 'Launch XLOne Report' link, it will display an XLOne report:</p> <div style="border: 1px solid black; padding: 10px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> Run Schedule ↻ </div> <p>FFS Detail report for Recur-Nat acc roll up Untied</p> <div style="display: flex;"> <div style="flex: 1; border-right: 1px solid #ccc; padding-right: 10px;"> <p>Parameters</p> <p>Criteria Details</p> </div> <div style="flex: 2; padding-left: 10px;"> <p>Parameters</p> <ul style="list-style-type: none"> General <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Description FFS Detail report for Recur-Nat acc roll up Untied</div> <div style="border: 1px solid #ccc; padding: 2px;">Category</div> Report Parameters <div style="margin-top: 10px;"> <div style="display: flex; justify-content: space-between;"> Month * ▼ </div> <div style="border: 1px solid #ccc; padding: 2px; width: 80%;">March</div> </div> <div style="margin-top: 5px;"> <div style="display: flex; justify-content: space-between;"> Year * ▼ </div> <div style="border: 1px solid #ccc; padding: 2px; width: 80%;">2023</div> </div> <div style="margin-top: 5px;"> <div style="display: flex; justify-content: space-between;"> Project * ▼ </div> <div style="border: 1px solid #ccc; padding: 2px; width: 80%; height: 20px;"></div> </div> </div> Report Output Options </div> </div> <div style="flex: 1; padding-left: 10px;"> <p>11:05:33 FFS Detail report for Recur-Nat acc roll up Untied</p> <hr/> <p style="text-align: center;">Income and Expenditure Statement for the period ending 31 March 2023</p> <p style="text-align: right;"> Flinders University</p> <p>Source: 001 Operating Project Manager: [redacted]</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th></th> <th>Month Actual</th> <th>2023 YTD Actuals</th> <th>Commitments</th> <th>YTD Actuals plus Commitments</th> </tr> </thead> <tbody> <tr> <td colspan="5">Income</td> </tr> <tr> <td>Total Income</td> <td style="text-align: right;">0</td> <td style="text-align: right;">0</td> <td style="text-align: right;">0</td> <td style="text-align: right;">0</td> </tr> <tr> <td>Internal Transfers</td> <td style="text-align: right;">0</td> <td style="text-align: right;">0</td> <td style="text-align: right;">0</td> <td style="text-align: right;">0</td> </tr> <tr style="background-color: #ffff00;"> <td>FUNDS AVAILABLE BEFORE EXPENDITURE</td> <td style="text-align: right;">0</td> <td style="text-align: right;">0</td> <td style="text-align: right;">0</td> <td style="text-align: right;">0</td> </tr> <tr> <td colspan="5">Expenditure</td> </tr> <tr> <td colspan="5">Salary Expenditure</td> </tr> <tr> <td>Professional Contract</td> <td style="text-align: right;">0</td> <td style="text-align: right;">0</td> <td style="text-align: right;">0</td> <td style="text-align: right;">0</td> </tr> <tr> <td>Professional</td> <td style="text-align: right;">0</td> <td style="text-align: right;">0</td> <td style="text-align: right;">0</td> <td style="text-align: right;">0</td> </tr> <tr> <td>Total Salary Expenditure</td> <td style="text-align: right;">0</td> <td style="text-align: right;">0</td> <td style="text-align: right;">0</td> <td style="text-align: right;">0</td> </tr> </tbody> </table> </div>		Month Actual	2023 YTD Actuals	Commitments	YTD Actuals plus Commitments	Income					Total Income	0	0	0	0	Internal Transfers	0	0	0	0	FUNDS AVAILABLE BEFORE EXPENDITURE	0	0	0	0	Expenditure					Salary Expenditure					Professional Contract	0	0	0	0	Professional	0	0	0	0	Total Salary Expenditure	0	0	0	0
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Appendix A:

How to change the **Theme** of your CiA Business Analytics dashboards.

#	Description
1	<p data-bbox="253 432 837 467">Click 'More' at the top RHS of your home screen.</p> 

#	Description
2	<p>Click Themes from the menu options. Then select which Theme you would like for your dashboard view.</p> <p>Note: You can change the Theme at any time.</p> 