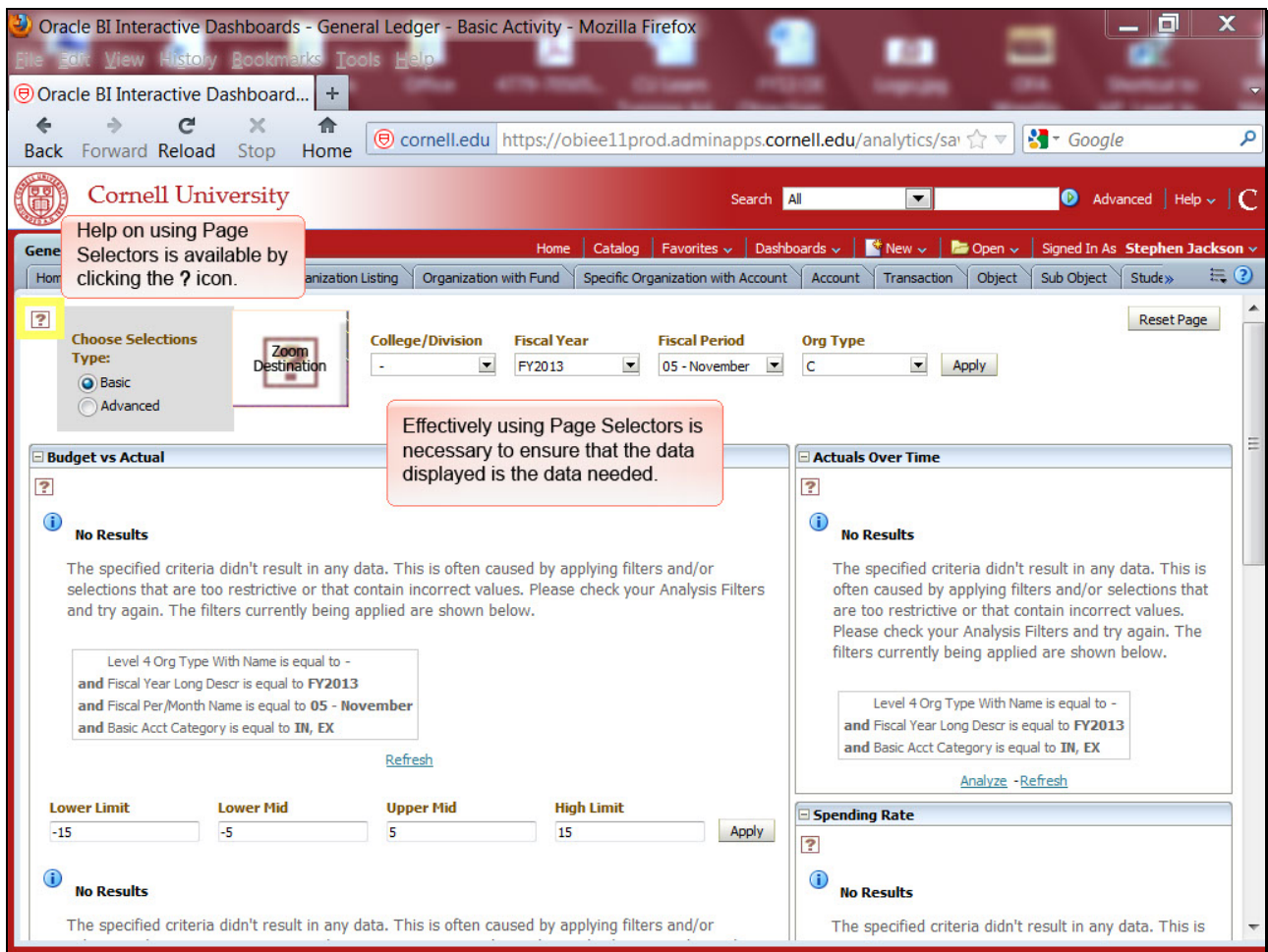


### Chapter 3: Using Dashboard Help



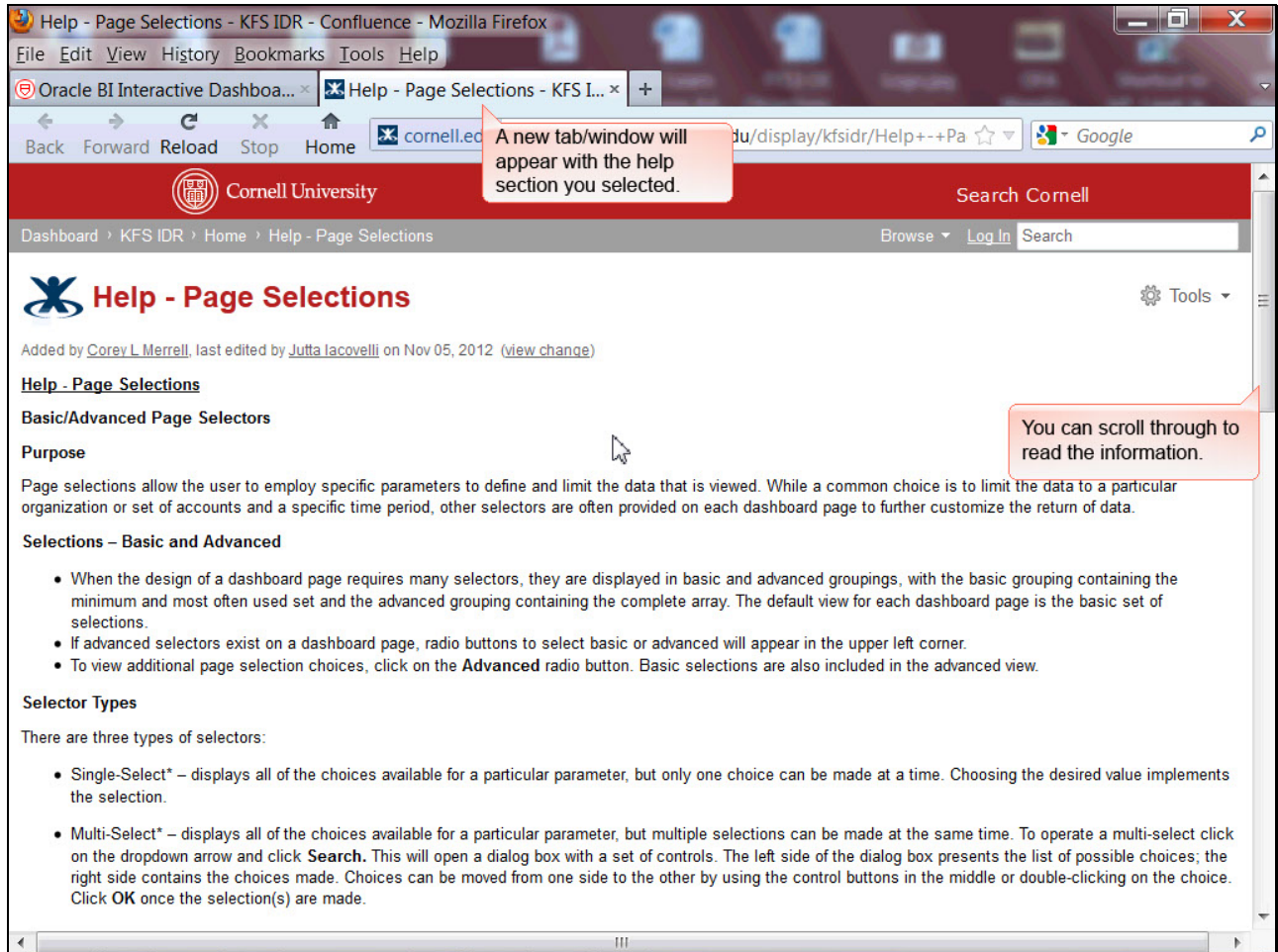
Effectively using Page Selectors is necessary to ensure that the data displayed is the data needed.

Help on using Page Selectors is available by clicking the ? icon.

The screenshot shows a web browser window with the following details:

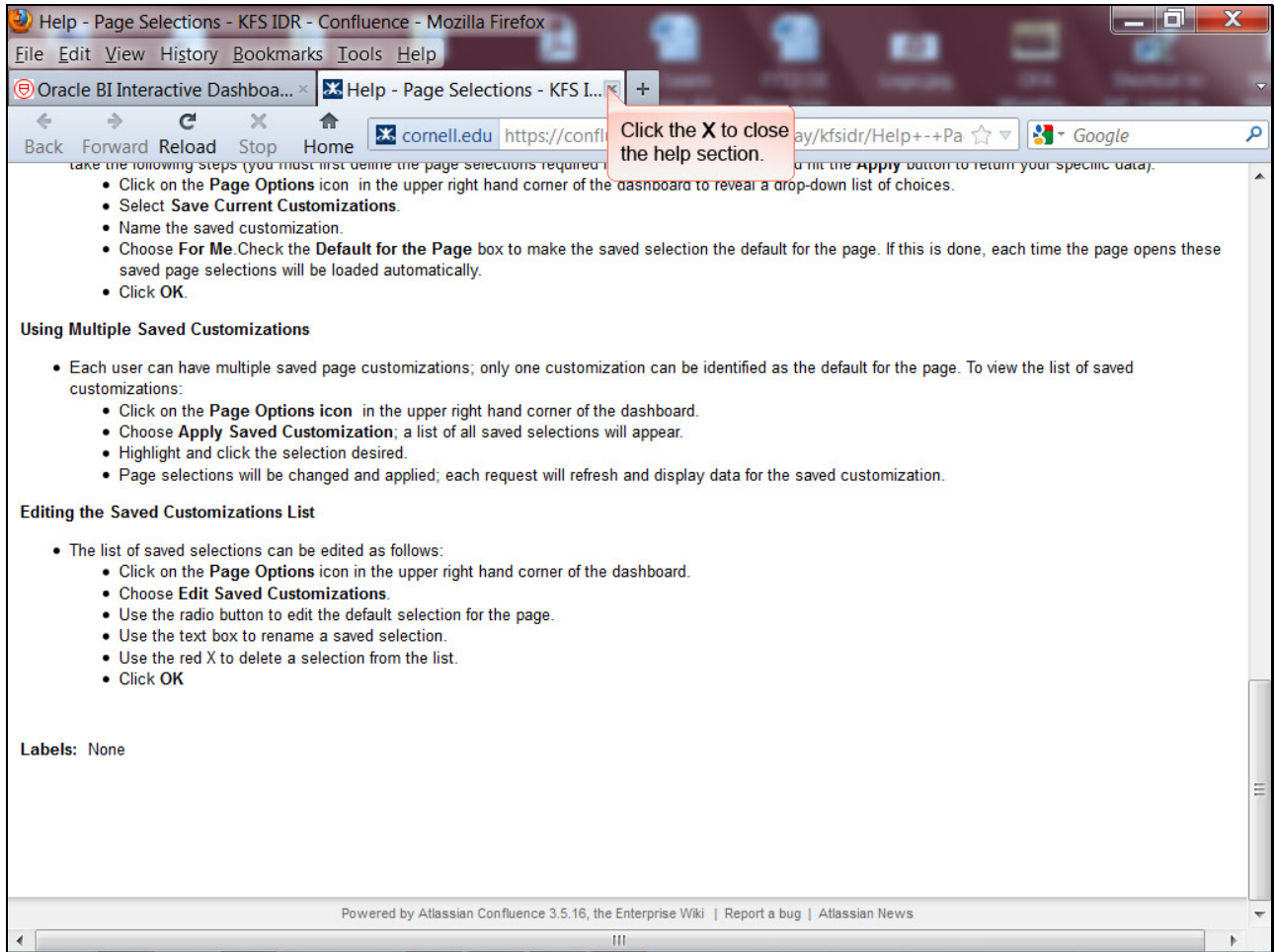
- Browser:** Mozilla Firefox
- Page Title:** Oracle BI Interactive Dashboards - General Ledger - Basic Activity
- URL:** https://obiee11prod.adminapps.cornell.edu/analytcs/sa
- Page Header:** Cornell University
- Navigation:** Home, Catalog, Favorites, Dashboards, New, Open, Signed In As Stephen Jackson
- Filters:** College/Division: -, Fiscal Year: FY2013, Fiscal Period: 05 - November, Org Type: C
- Callout:** A red box with a question mark icon and the text "Select the question mark button." points to a question mark icon in the "Choose Selections" area.
- Content:** Three panels show "No Results" for "Budget vs Actual", "Actuals Over Time", and "Spending Rate". Each panel includes a message: "The specified criteria didn't result in any data. This is often caused by applying filters and/or selections that are too restrictive or that contain incorrect values. Please check your Analysis Filters and try again. The filters currently being applied are shown below." and a list of filters: "Level 4 Org Type With Name is equal to - and Fiscal Year Long Descr is equal to FY2013 and Fiscal Per/Month Name is equal to 05 - November and Basic Acct Category is equal to IN, EX".
- Footer:** javascript:void(null)

Select the **question mark** button.



A new tab/window will appear with the help section you selected.

You can scroll through to read the information.



Click the **X** to close the help section.

The screenshot shows a web browser window with the following details:

- Browser: Mozilla Firefox
- Address Bar: <https://obiee11prod.adminapps.cornell.edu/analytcs/sa>
- Page Title: Oracle BI Interactive Dashboards - General Ledger - Basic Activity
- Navigation: Home, Catalog, Favorites, Dashboards, New, Open, Signed In As Stephen Jackson
- Filters: College/Division: -, Fiscal Year: FY2013, Fiscal Period: 05 - November, Org Type: C
- Sections: Budget vs Actual, Actuals Over Time, Spending Rate
- Results: All sections show "No Results" with a message: "The specified criteria didn't result in any data. This is often caused by applying filters and/or selections that are too restrictive or that contain incorrect values. Please check your Analysis Filters and try again. The filters currently being applied are shown below." The filters listed are: "Level 4 Org Type With Name is equal to - and Fiscal Year Long Descr is equal to FY2013 and Fiscal Per/Month Name is equal to 05 - November and Basic Acct Category is equal to IN, EX".
- Callout Box: A red-bordered box with a question mark icon and the text: "Help specific to each section is also available by clicking the ? icon in that section." This box points to a question mark icon in the top-left corner of the "Budget vs Actual" section.

Help specific to each section is also available by clicking the ? icon in that section.

Help - Budget vs Actual - KFS IDR - Confluence - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Oracle BI Interactive Dashboa... x Help - Budget vs Actual - KFS... x +

Back Forward Reload Stop Home [cornell.edu](http://cornell.edu) <https://confluence.cornell.edu/display/kfsidr/Help+-+Bu> ☆ Google

Cornell University Search Cornell

Dashboard > KFS IDR > ... > Dashboard - General Ledger Basic Activity > Help - Budget vs Actual Browse Log In Search

## Help - Budget vs Actual

Added by [Rayna J King](#), last edited by [Jutta Iacovelli](#) on Nov 07, 2012 ([view change](#))

**Purpose**

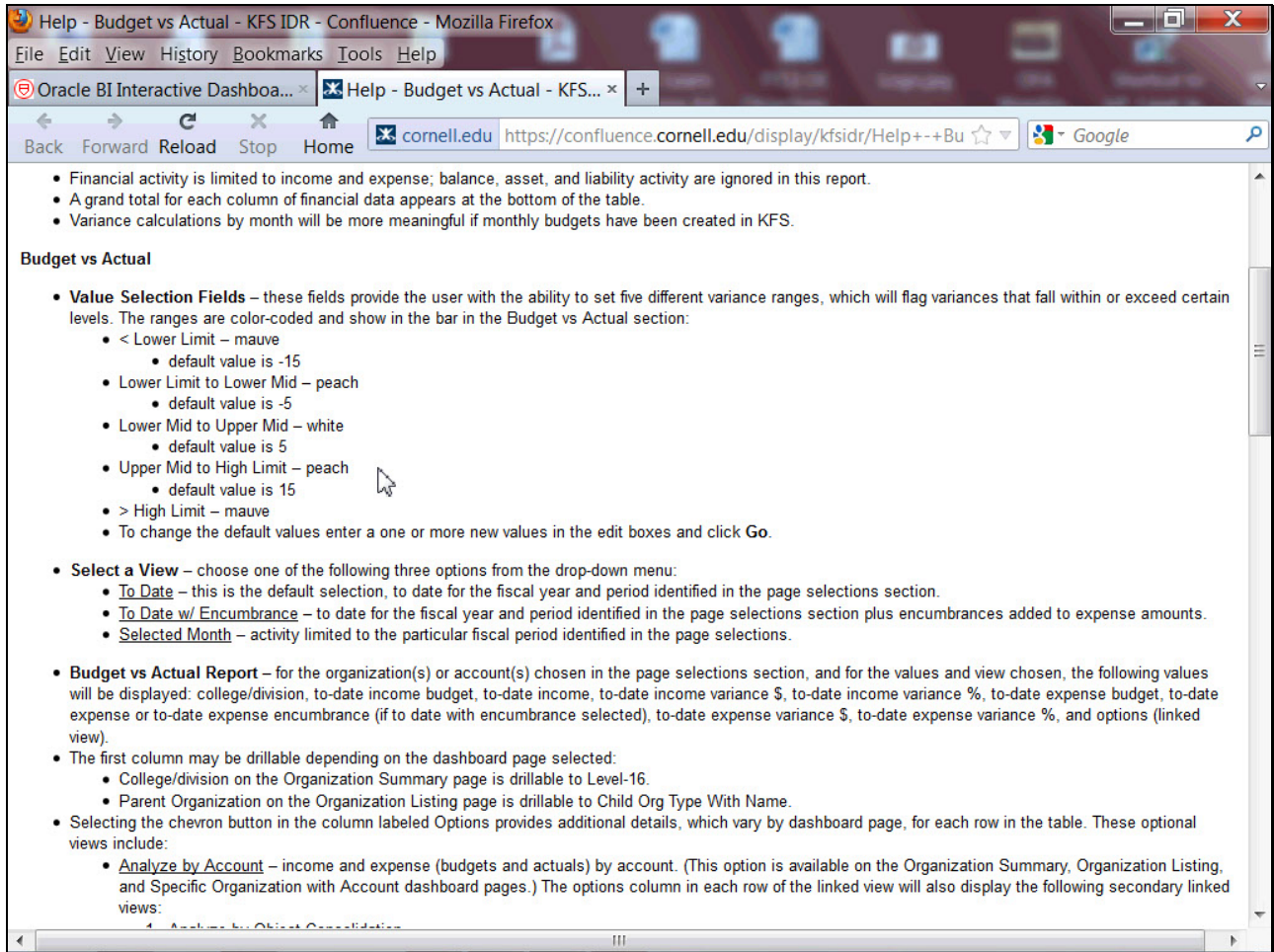
This report compares budgets to actual income and expenses on a monthly, to-date, or to-date-with-encumbrance basis, calculating dollar and percent variances to the amounts budgeted.

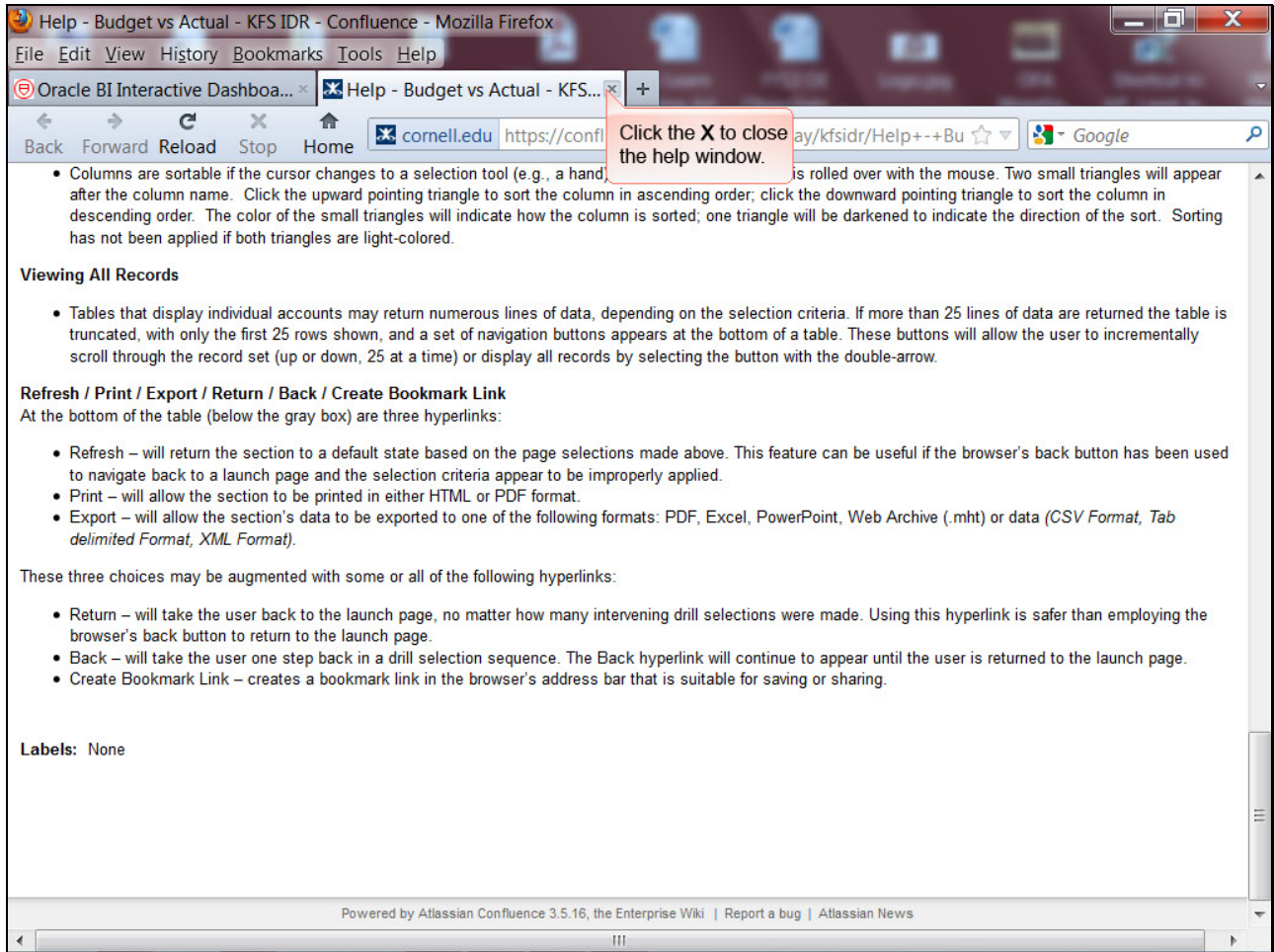
**General Notes**

- Financial activity is limited to income and expense; balance, asset, and liability activity are ignored in this report.
- A grand total for each column of financial data appears at the bottom of the table.
- Variance calculations by month will be more meaningful if monthly budgets have been created in KFS.

**Budget vs Actual**

- **Value Selection Fields** – these fields provide the user with the ability to set five different variance ranges, which will flag variances that fall within or exceed certain levels. The ranges are color-coded and show in the bar in the Budget vs Actual section:
  - < Lower Limit – mauve
    - default value is -15
  - Lower Limit to Lower Mid – peach
    - default value is -5
  - Lower Mid to Upper Mid – white
    - default value is 5
  - Upper Mid to High Limit – peach
    - default value is 15
  - > High Limit – mauve
  - To change the default values enter a one or more new values in the edit boxes and click Go.
- **Select a View** – choose one of the following three options from the drop-down menu:
  - To Date – this is the default selection to date for the fiscal year and period identified in the page selections section





Click the **X** to close the help window.



The screenshot shows a web browser window with the following details:

- Browser:** Mozilla Firefox
- Address Bar:** <https://obiee11prod.adminapps.cornell.edu/analytcs/sa>
- Page Header:** Oracle BI Interactive Dashboards - General Ledger - Basic Activity
- Navigation:** Home, Catalog, Favorites, Dashboards, New, Open, Signed In As Stephen Jackson
- Filters:** College/Division: -, Fiscal Year: FY2013, Fiscal Period: 05 - November, Org Type: C
- Sections:** Budget vs Actual, Actuals Over Time, Spending Rate
- Status:** All three sections display "No Results" with a message: "The specified criteria didn't result in any data. This is often caused by applying filters and/or selections that are too restrictive or that contain incorrect values. Please check your Analysis Filters and try again. The filters currently being applied are shown below."
- Filter Details:** Level 4 Org Type With Name is equal to -, and Fiscal Year Long Descr is equal to FY2013 and Fiscal Per/Month Name is equal to 05 - November and Basic Acct Category is equal to IN, EX
- Spending Rate Section:** Includes input fields for Lower Limit (-15), Lower Mid (-5), Upper Mid (5), and High Limit (15), with an Apply button.

Back on the dashboard page.