Scenarios

The scenarios below will help you practice using the various functions within the **Financial Summary Trends** page, such as the filter menu and report tabs.

Scenario 1: View all data for your department for a particular fiscal year.

Step	Task
1.	From the **Financial Summary** tab, make selections in each filter category that correspond with your unit: • **Chart:** Select your *Chart* • **College:** Skip this filter • **School:** Skip this filter • **Department:** Uncheck *All*, then check the box for your *Department* **NOTE:** Since filters are relational, when you uncheck *All* here, the higher-level filters will change accordingly (such as Chart, College, School). Once you check your selection here, those filters will re-populate with the corresponding values from your selections in the previous steps. • **Sub-Org:** Leave default *All* selected • **CFOP:** Leave default *All* selected • **Type of Funds:** Leave default *All* selected • **Fund Type:** Leave default *All* selected • **PI:** Leave default *All* selected • **Grant:** Leave default *All* selected • **Fiscal Year:** Select the desired *Fiscal Year*

Step	Task
	• **Fiscal Period:** Leave default *All* selected **NOTE:** Remember that there will be load time after each filter selection is made. Allow the tool time to load your results into the report tab before selecting another filter.
2.	Once the report has loaded, review the information on the **Financial Summary** tab. **NOTE:** It may be necessary to use the interior vertical scroll bar or the horizontal scroll bar in the viewing window to view all the information presented.
3.	When finished with the **Financial Summary** tab, click on each additional report tab to review the information there. **NOTE:** All filters you select will carry over to each tab except the **Graphs** tabs (which has additional selectors for fiscal year and fiscal period, allowing you to compare data across years). Be sure to give the tabs adequate time to load, and use the interior vertical scroll bar or the horizontal scroll bar in the viewing window to view all the information presented.
4.	To clear the filters you selected and start another search, click the **Revert** icon on the **Toolbar**.

Scenario 2: View data for the first six months of a particular fiscal year for your department.

Step	Task
1.	On the **Filter Menu**, make selections in each filter category that correspond with your unit: • **Chart:** Select your *Chart* • **College:** Skip this filter • **School:** Skip this filter **Department:** Uncheck *All*, then check then check the box for your *Department* **NOTE:** Since filters are relational, when you uncheck *All* here, the higher-level filters will change accordingly (such as Chart, College, School). Once you check your selection here, those filters will re-populate with the corresponding values from your selections in the previous steps. • **Sub-Org:** Leave default *All* selected • **CFOP:** Leave default *All* selected • **Type of Funds:** Leave default *All* selected • **Fund Type:** Leave default *All* selected • **PI:** Leave default *All* selected • **Grant:** Leave default *All* selected • **Fiscal Year:** Select the desired *Fiscal Year* • **Fiscal Period:** Uncheck *All*, and check the boxes for the first six months of the Fiscal Year (*July* through *December*) and for *GL/ENC – Keep Selected* if it is available

Step	Task
	NOTE: Remember that there will be load time after each filter selection is made. Allow the tool time to load your results into the report tab before selecting another filter.
2.	Once the report has loaded, review the information on the **Financial Summary** tab. **NOTE:** It may be necessary to use the interior vertical scroll bar or the horizontal scroll bar in the viewing window to view all the information presented.
3.	When finished with the **Financial Summary** tab, click on each additional report tab to review the information there. **NOTE:** All filters you select will carry over to each tab except the **Graphs** (which has additional selectors for fiscal year and fiscal period, allowing you to compare data across years). Be sure to give the tabs adequate time to load, and use the interior vertical scroll bar or the horizontal scroll bar in the viewing window to view all the information presented.
4.	To clear the filters you selected and start another search, click the **Revert** icon on the **Toolbar**.

Scenario 3: View all the activity for a specific month in a particular fiscal year for your College.

Step	Task
1.	On the **Filter Menu**, make selections in each filter category that correspond with your unit: • **Chart:** Select your *Chart* • **College:** Select your *College* • **School:** Leave default *All* selected • **Department:** Leave default *All* selected • **Sub-Org:** Leave default *All* selected • **CFOP:** Leave default *All* selected • **Type of Funds:** Leave default *All* selected • **Fund Type:** Leave default *All* selected • **PI:** Leave default *All* selected • **Grant:** Leave default *All* selected • **Fiscal Year:** Check the box for the desired *Fiscal Year* • **Fiscal Period:** Uncheck *All*, and check the box for the desired month and for *GL/ENC – Keep Selected* if it is available **NOTE:** Remember that there will be load time after each filter selection is made. Allow the tool time to load your results into the report tab before selecting another filter.
2.	Once the report has loaded, review the information on the **Financial Summary** tab. **NOTE:** It may be necessary to use the interior vertical scroll bar or the horizontal scroll bar in the viewing window to view all the information presented.
3.	When finished with the **Financial Summary** tab, click on each additional report tab to review the information there.

Step	Task
	NOTE: All filters you select will carry over to each tab except the **Graphs** tabs (which has additional selectors for fiscal year and fiscal period, allowing you to compare data across years). Be sure to give the tabs adequate time to load, and use the interior vertical scroll bar or the horizontal scroll bar in the viewing window to view all the information presented.
4.	To clear the filters you selected and start another search, click the **Revert** icon on the **Toolbar**.

Scenario 4: View the overall financial position of your unit, college or department for a particular fiscal year.

Step	Task
1.	From the **Financial Summary** tab, make selections in each filter category that correspond with your unit, or you can follow this example which uses the following parameters: • **Chart:** Select your *Chart* • **College:** Select your *College* • **School:** *School* will automatically populate based on your *College* selection; do not change • **Department:** Uncheck *All*, then check the box for your *Department* **NOTE:** Since filters are relational, when you uncheck *All* here, the higher-level filters change (*Chart, College, and School*). Once you check your selection here, those filters will re-populate with the corresponding values, which should match your selections in the previous steps. • **Sub-Org:** Leave default *All* selected • **CFOP:** Leave default *All* selected • **Type of Funds:** Leave default *All* selected • **Fund Type:** Leave default *All* selected • **PI:** Leave default *All* selected • **Grant:** Leave default *All* selected • **Fiscal Year:** Select the desired *Fiscal Year* • **Fiscal Period:** Leave default *All* selected **NOTE:** Remember that there will be load time after each filter selection is made. Allow the tool time to load your results into the report tab before selecting another filter.
2.	Once the report has loaded, review the information on the **Financial Summary** tab. **NOTE:** It may be necessary to use the vertical and horizontal scroll bars in the viewing window to see all the information presented.
3.	When finished with the **Financial Summary** tab, click on each additional report tab to review the information there. **NOTE:** All filters you select will carry over to each tab except the **Graphs** tabs (which has additional selectors for fiscal year and fiscal period, allowing you to compare data across years). Be sure to give the tabs adequate time to load, and use the interior

Step	Task
	vertical scroll bar or the horizontal scroll bar in the viewing window to view all the information presented.
4.	To clear the filters you selected and start another search, click the **Revert** icon on the **Toolbar**.

Scenario 5: View the Prior Year Balance Forward and Current Year Gain/Loss for your College for a particular fiscal year.

Step	Task
1.	From the **Financial Summary** tab, make selections in each filter category that correspond with your unit: • **Chart:** Select your *Chart* • **College:** Select your *College* • **School:** Select your *School* • **Department:** Leave default *All* selected • **Sub-Org:** Leave default *All* selected • **CFOP:** Leave default *All* selected • **Type of Funds:** Leave default *All* selected • **Fund Type:** Leave default *All* selected • **PI:** Leave default *All* selected • **Grant:** Leave default *All* selected • **Fiscal Year:** Select the desired *Fiscal Year* • **Fiscal Period:** Leave default *All* selected **NOTE:** Remember that there will be load time after each filter selection is made. Allow the tool time to load your results into the report tab before selecting another filter.
2.	Once the report has loaded, click on the **Account Type Details** tab to review the information there. **Prior Year Balance Forward** displays in section A and **Current Year Gain/Loss** displays in section B. **NOTE:** It may be necessary to use the vertical and horizontal scroll bars in the viewing window to see all the information presented.
3.	To clear the filters you selected and start another search, click the **Revert** icon on the **Toolbar**.

Scenario 6: View the revenue/expense summary level totals by CFOP for a specific department in your college in a particular fiscal year.

Step	Task
1.	From the **Financial Summary** tab, make selections in each filter category that correspond with your unit: • **Chart:** Select your *Chart*

Step	Task
	• **College:** Select your *College* • **School:** Leave default *All* selected • **Department:** Uncheck *All*, and check the box(es) for your *Department* • **Sub-Org:** Leave default *All* selected • **CFOP:** Leave default *All* selected • **Type of Funds:** Leave default *All* selected • **Fund Type:** Leave default *All* selected • **PI:** Leave default *All* selected • **Grant:** Leave default *All* selected • **Fiscal Year:** Select the desired *Fiscal Year* • **Fiscal Period:** Leave default *All* selected **NOTE:** Remember that there will be load time after each filter selection is made. Allow the tool time to load your results into the report tab before selecting another filter.
2.	Once the report has loaded, click on the **FOP Balances** tab to review the information there. **NOTE:** It may be necessary to use the vertical and horizontal scroll bars in the viewing window to see all the information presented.
3.	To clear the filters you selected and start another search, click the **Revert** icon on the **Toolbar**.

Scenario 7: View transactions for a specific department in your college for a particular month and fiscal year.

Step	Task
1.	From the **Financial Summary** tab, make selections in each filter category that correspond with your unit: • **Chart:** Select your *Chart* • **College:** Select your *College* • **School:** Leave default *All* selected • **Department:** Uncheck *All* and check the box(es) for the desired *Department* • **Sub-Org:** Leave default *All* selected • **CFOP:** Leave default *All* selected • **Type of Funds:** Leave default *All* selected • **Fund Type:** Leave default *All* selected • **PI:** Leave default *All* selected • **Grant:** Leave default *All* selected • **Fiscal Year:** Select the desired *Fiscal Year* • **Fiscal Period:** Uncheck *All* and check the box for the desired month and for *GL/ENC – Keep Selected* if it is available

Step	Task
	NOTE: Remember that there will be load time after each filter selection is made. Allow the tool time to load your results into the report tab before selecting another filter.
2.	Once the report has loaded, click on the **Transactions** tab to review the information there. **NOTE:** It may be necessary to use the vertical and horizontal scroll bars in the viewing window to see all the information presented.
3.	To clear the filters you selected and start another search, click the **Revert** icon on the **Toolbar**.

Scenario 8: View comparison graphs for your department's budget for a specific month over the past three years.

Step	Task
1.	From the **Financial Summary** tab, make selections in each filter category that correspond with your unit: • **Chart:** Select your *Chart* • **College:** Select your *College* • **School:** Select your *School* • **Department:** Uncheck *All* and check the box(es) for your particular *Department(s)* • **Sub-Org:** Leave default *All* selected • **CFOP:** Leave default *All* selected • **Type of Funds:** Leave default *All* selected • **Fund Type:** Leave default *All* selected • **PI:** Leave default *All* selected • **Grant:** Leave default *All* selected • **Fiscal Year:** Select a *Fiscal Year* • **Fiscal Period:** Leave default *All* selected **NOTE:** In order to generate any data, you must select an option in the **Fiscal Year** field here. You will be able to select different or multiple fiscal years and fiscal periods for comparison directly on the **Graphs** tab after the initial report is generated. Also, remember that there will be load time after each filter selection is made. Allow the tool time to load your results into the report tab before selecting another filter.
2.	Once the report has loaded, click on the **Graphs - Budget** tab and let the page load. **NOTE:** The **Graphs** tabs automatically provides a five-year comparison for the current and past four fiscal years and automatically includes all fiscal periods. It may be necessary to use the vertical and horizontal scroll bars in the viewing window to see all the information presented.

Step	Task
3.	To view one or more fiscal years on the **Graphs - Budget** tab, uncheck *All* under the **Select Fiscal Year** drop-down menu, then check the box(es) for the desired *Fiscal Years.*
4.	To view a specific fiscal period on the **Graphs - Budget** tab, uncheck *All* under the **Select Fiscal Period** drop-down menu, then check the box(es) for the desired *Fiscal Period* and for *GL/ENC – Keep Selected* if it is available. **NOTE:** If you already made these selections on the **Graphs – Expenditures** tab, they will carry over to the **Graphs – Budget** tab. Allow the tool time to load your results into the report tab. When the results display, the first graph displays **Budget by Type of Fund**, the second displays **Budget by Category**, and the third provides **Carry Forward**. Data for each graph section is displayed below the graphs.
5.	To clear the filters you selected and start another search, click the **Revert** icon on the **Toolbar**.

Scenario 9: View comparison graphs for my department's expenditures for a specific month over the past two years.

Step	Task
1.	From the **Financial Summary** tab, make selections in each filter category that correspond with your unit: • **Chart:** Select your *Chart* • **College:** Select your *College* • **School:** Select your *School* • **Department:** Uncheck *All* and check the box(es) for your *Department* • **Sub-Org:** Leave default *All* selected • **CFOP:** Leave default *All* selected • **Type of Funds:** Leave default *All* selected • **Fund Type:** Leave default *All* selected • **PI:** Leave default *All* selected • **Grant:** Leave default *All* selected • **Fiscal Year:** Select a *Fiscal Year* • **Fiscal Period:** Leave default *All* selected **NOTE:** In order to generate any data, you must select an option in the **Fiscal Year** field here. You will be able to select different or multiple fiscal years and fiscal periods for comparison directly on the **Graphs** tab after the initial report is generated. Also, remember that there will be load time after each filter selection is made. Allow the tool time to load your results into the report tab before selecting another filter.
2.	Once the report has loaded, click on the **Graphs - Expenditures** tab to review the information there. **NOTE:** The **Graphs** tabs automatically provides a five-year comparison for the current and past four fiscal years and automatically includes all fiscal periods. It may be

Step	Task
	necessary to use the vertical and horizontal scroll bars in the viewing window to see all the information presented.
3.	To view one or more fiscal years on the **Graphs - Expenditures** tab, uncheck *All* under the **Select Fiscal Year** drop-down menu, then check the box(es) for the desired *Fiscal Years.*
4.	To view a specific fiscal period on the **Graphs - Expenditures** tab, uncheck *All* under the **Select Fiscal Period** drop-down menu, then check the box(es) for the desired *Fiscal Period* and for *GL/ENC – Keep Selected* if it is available. **NOTE:** If you have already made these selections on the **Graphs – Budget** tab, they will carry over to the **Graphs – Expenditures** tab. Allow the tool time to load your results into the report tab. When the results display, the first graph displays **Budget vs Expense**, the second displays **Unencumbered by Type of Fund**, and the third displays **Expenditures by Category**. Data for each graph section is displayed below the graphs.
5.	To clear the filters you selected and start another search, click the **Revert** icon on the **Toolbar**.