Fiscal Admin Dashboard Overview

This Quick Reference Guide (QRG) is designed to walk **Fiscal Administrator/Operational Support roles** (e.g., Cost Center Manager, Preparer & Approver for Account Certification, P2P Roles - Requisitioner & Approver, and Payroll Costing Manager & Specialist) through navigating the Fiscal Admin Dashboard. The **Fiscal Admin Dashboard** provides a one-stop shop for the aforementioned roles to access common tasks, reports, and other resources needed to perform their daily work. By the end of this QRG, you will be able to access, set up, and review the Fiscal Admin Dashboard.
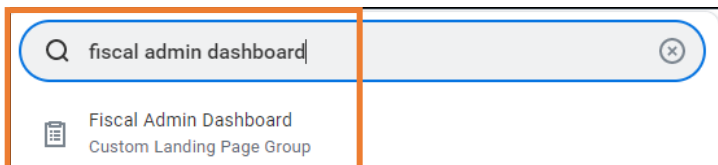
Table of Contents

Access the Fiscal Admin Dashboard

You can access the Fiscal Admin Dashboard in two ways: by searching directly in Workday or by selecting the Fiscal Admin Dashboard app/worklet.

Access Fiscal Admin Dashboard from Workday Search:

On the **Workday Home** screen:

1. Type **Fiscal Admin Dashboard** and select the item.

*Access Fiscal Admin Dashboard from Workday Applications:*

On the **Workday Home** screen:

1. Click **View All Apps** *OR* **Menu** at the top left of the screen.
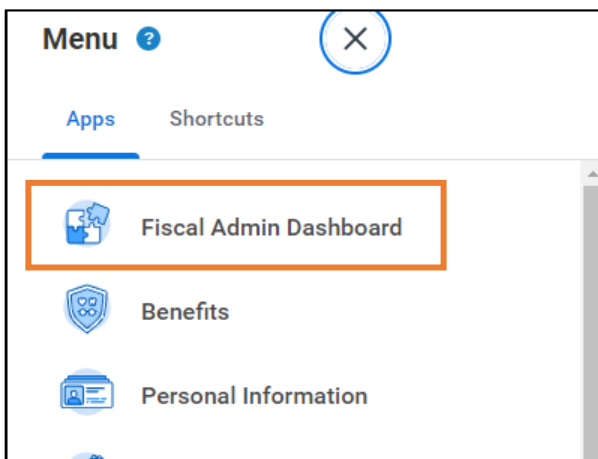
On the **Menu** screen:

2. Select **Apps** (if it is not already selected).

3. To add the Fiscal Admin Dashboard app, click the **Add Apps** button at the bottom of the menu.

4. Type *Fiscal Admin Dashboard* in the **Find Apps** field and then click the **plus sign** next to the item.
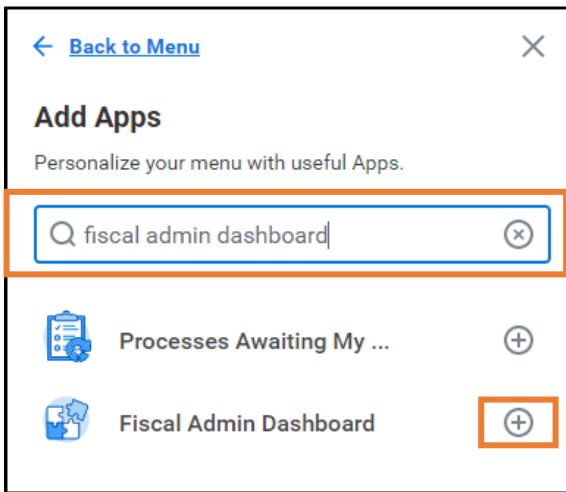
5. Click **Back to Menu**.

On the **Menu** screen:

6. Select the **Fiscal Admin Dashboard** app to open the dashboard.

NOTE	For quick access to the dashboard, you can add the **Fiscal Admin Dashboard Landing Page** to your Browser Favorites (bookmarks).

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Set Up and Modify Fiscal Admin Dashboard

When visiting the Fiscal Admin Dashboard for the first time, **you will need to set up each section once in order for the data to display for future visits.** You can set up and modify these sections by using available functionalities (Configure and View Chart Data). You may have one or both options available at the top right corner of each section.

The table below provides a summary of the functionalities available in the Fiscal Admin Dashboard. Each functionality is displayed in the form of icons when viewing a section in Workday.

Icon	Name	Description
	Configure and View Chart Data	**View Chart Data** allows you to select various chart types to view your data. For example, Donut, Line, Stacked Column, etc. **Configure** allows you to modify your variables on the X and Y Axis and the metrics to be included.
	Edit Settings	The **Edit Settings** option allows you to filter the data and view only relevant data using worktags. Once you have made your selections, click **OK** in the **Edit Worklet Settings** to save changes. You will most commonly filter by your **Cost Center/Cost Center Hierarchy**. You can download and export the report using the **Download in Excel** and **Export to Worksheets** options respectively.

NOTE	It is important to set-up your preferences early on as this will automatically save for future visits to the Dashboard.

Modify Section - Edit Settings as follows:

1. On the **Fiscal Admin Dashboard**, navigate to the section you want to edit settings and configure.
2. Click the **Edit Settings** (gear) icon.
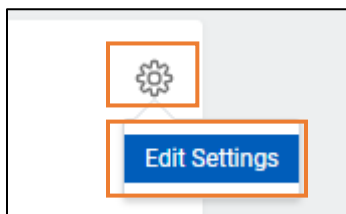
3. On the **Edit Worklet Settings** screen, enter the information required for each field to customize this section. You can also enter information in the optional fields to narrow your search results.

NOTE

On the Edit Worklet Settings screen, there may be different fields you can complete for each section. **You will most likely filter by your Cost Center/Cost Center Hierarchy**.

In the **Cost Center** or **Worktags** field, enter your cost center. You can also select **Cost Centers by Cost Center Hierarchy** if needed.

Edit Worklet Settings	YTD CC Expense Summary for Fiscal Admin Dashboard
Edit Settings	
Worktags	[ ] ☰

OK   Cancel

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4. Click the **OK** button to save your changes. The data displayed in the sections will update based on your defined preferences.

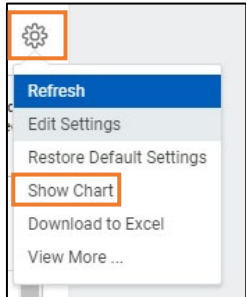## Modify Section - Configure and View Chart Data as follows:

1. On the **Fiscal Admin Dashboard**, navigate to the section you want to configure and view chart data.
2. Click the **Configure and View Chart Data** icon.

Donut	Line	Bubble
Clustered Column	Stacked Column	100% Column
Clustered Bar	Stacked Bar	100% Bar
Overlaid Area	Stacked Area	100% Area

Configure

NOTE	If you do not see the **Configure and View Chart Data** icon, click the **Edit Settings** (gear) icon and select **Show Chart**. The icon will now display.

3. Select the **chart type** you want to view the data (e.g. Donut, Line, Stacked Bar, etc.).
4. For advanced settings, select **Configure**.
5. In the **Configure** window, modify the variables section as needed, such as the Horizontal Axis and Legend.
6. Click the **arrow (>)** icon next to **Advanced** to expand the section and modify as needed.
7. Click the **(x)** icon to close out the window. Your changes will now be displayed and saved.

Review Fiscal Admin Dashboard

On the **Fiscal Admin Dashboard** screen:

1. Select the following tabs:
   - **Landing Page** – This page displays sections such as Processes Awaiting Action, YTD Expenses by Cost Center, and Fiscal Admin Spotlight Reports in the form of a chart and table.

   - **Purchasing/Spend** – This tab displays sections such as OTPS Spend Summary in the form of a chart and table. It also lists tasks, reports and quick links related to Purchasing/Spend.

   - **Finances** – This tab displays sections such as YTD Revenue Summary and Budget vs Actual by Cost Center in the form of a chart and table. It also lists tasks, reports, and quick links related to Finances.

   - **Payroll Costing** – This tab displays sections such as YTD Personnel Expense in the form of a chart and table. It also lists tasks, reports, and quick links related to Payroll Costing.

   - **Workforce** – This tab displays sections such as Workforce Report in the form of a chart and table. It also lists tasks, reports, and quick links related to Workforce.

NOTE	When reviewing each tab, certain data may not display initially. This requires you to configure and edit the specific sections to match your viewing preferences. Refer to Modify Fiscal Admin Dashboard to set your data viewing preferences.

Under the **Landing Page** tab:

2. Review the following sections:

- **Processes Awaiting Action** – Lists the business processes that are awaiting action from you. Hover your mouse over the specific area for further details and select the item to take action on.
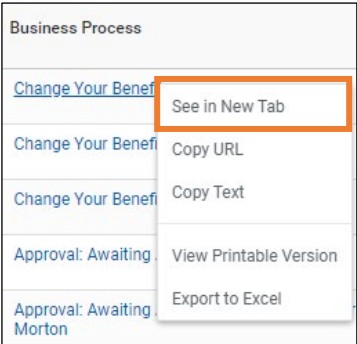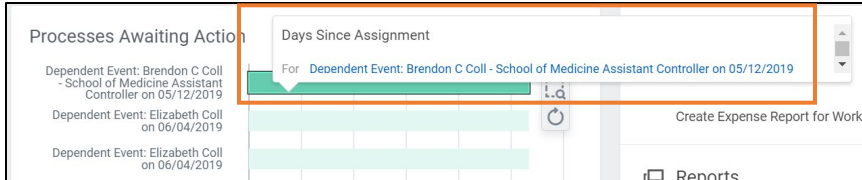

- **YTD Expenses by Cost Center** – You can view the total sum of Ledger/Budget Debit minus Credit for **YTD Expenses by Cost Center.** Hover your mouse over an area or select a data point for further details.

- **Fiscal Admin Spotlight Reports** – You can access a list of **Fiscal Admin Spotlight Reports** you can view. Spotlight reports provide a list of custom and standard reports that support different functions. This is a one stop shop to view all reports related to one area. Select the report you would like to run from this section.

- **Reports** - You can access common reports such as **FDM Reference - Designated**, **FDM Reference – Cost Center,** and **FDM Reference – Funds.** Select the report you would like to run from this section.

- **Quick Links** – You can access quick links such as **UVA Finance**, **UBI User Hub**, and **UVA Finance Business Terms.** These are sites or sources available outside Workday. Select the link you would like to go to from this section.

NOTE	Instead of selecting the hyperlink directly, **right click** and select **See in New Tab**. This will open the hyperlink in a brand-new tab that avoids having to navigate back to the Fiscal Admin Dashboard.

Under the **Purchasing/Spend** tab:

3. Review the following sections:
   - **OTPS FYTD Spend Summary** – You can view the total Sum of Ledger/Budget Debit minus Credit for OTPS Spend. Hover your mouse over an area or select a data point for further details.
   - **Tasks** - You can access common tasks such as **Create Expense Report**, **Create Requisition**, and **Find Purchase Orders.** Select the task you would like to initiate from this section.
   - **Reports** - You can access common reports such as **Find Suppliers Contact Info**, **Spend by Purchase Orders**, and **Customer Invoices in Progress.** Select the report you would like to run from this section.
   - **Quick Links** – You can access quick links such as **UVA Finance**, **UBI User Hub**, and **PaymentWorks Resources**. These are sites or sources available outside Workday. Select the link you would like to go to from this section.

Under the **Finances** tab:

4. Review the following sections:
   - **YTD Revenue** – You can view the total Sum of Ledger/Budget Debit minus Credit for **YTD Revenue**. Hover your mouse over an area or select a data point for further details..
   - **Current Fund Balance** – You can view details of the total Sum of Ledger/Budget Debit minus Credit for **Current Fund Balance**. Hover your mouse over an area or select a data point for further details.
   - **Tasks** - You can access common tasks such as **Create Journal** and **Find Journal Lines.** Select the task you would like to initiate from this section.
   - **Reports** - You can access common reports such as **Fund Balance by Fund**, **Fund Balance by Cost Center, Budget Spotlight Reports** and **Fund Balance by Assignee.** Select the report you would like to run from this section.
   - **Quick Links** – You can access quick links such as **UBI User Hub.** These are sites or sources available outside Workday. Select the link you would like to go to from this section.

Under the **Payroll Costing** tab:

5. Review the following sections:
   - **YTD Personnel Expense** – You can view the total Sum of Ledger/Budget Debit minus Credit for **YTD Personnel Expense**. Hover your mouse over an area or select a data point for further details.
   - **Tasks** - You can access common tasks such as **Assign Costing Allocation** and **Create Payroll Accounting Adjustments**. Select the task you would like to initiate from this section.
   - **Reports** - You can access the **Worker Costing Allocation Information – Payroll** report from this section.
   - **Quick Links** – You can access quick links such as **Salary Cap Tool**, **UVA Payroll Calendars**, **UVA Holiday Calendars**, and **Fringe Rates**. These are sites or sources available outside Workday. Select the link you would like to go to from this section.

Under the **Workforce** tab:

6. Review the following sections:

    - **Workforce Report** – You can view details such as Position Count, Open Positions, Count of Distinct Workers, and FTE Sum. Hover your mouse over an area or select a data point for further details.

    - **Tasks -** You can access common tasks such as Create Job Requisition and Find Jobs. Select the task you would like to initiate from this section.

    - **Reports -** You can access common reports such as Current Worker Detail Report, All Jobs and Positions by Organization, and Employee Addresses. Select the report you would like to run from this section.

    - **Quick Links –** You can access quick links such as **UBI User Hub**, **Hoo's Well** and **Academic Calendars**. These are sites or sources available outside Workday. Select the link you would like to go to from this section.

NOTE	The tasks and reports that display in each tab are dependent on your security roles. Therefore, some items described in this QRG may not display if they are not applicable to your security role(s).