

Anaplan Dashboard App

Columbia Dashboards

General Purpose:

The Dashboard App is designed to use various charts and graphs to provide end users with high-level overviews of financial and budget-related information.

Note: As certain Dashboards are only relevant for specific user groups, it is likely for users to not have access to all Dashboards outlined below.

Overview of Dashboards:

1.01 - Historical Trend Graphs (Columbia)

This Dashboard provides the following graphs for each Columbia Operating Unit:

- 1) Cumulative Month-End Fund Balance
- 2) Year-End Fund Balance
- 3) Cumulative Expenses
- 4) Monthly Expenses
- 5) Cumulative Revenue
- 6) Cumulative Contras & Transfers
- 7) Indirect Cost / Support Unit Budgets
- 8) Model Allocations
 - This card is only relevant for Academic Units as it shows actual Model Allocations, which include Subvention, Participation Fees, Legacy Model Adjustment, and SIF.

1.02 - Budget Model – Academic

This Dashboard contains the following information:

- 1) Budget Model allocation metrics
 - Note: Years within this card reference the actual data/metric year.
- 2) Current year and historical model allocation amounts

1.03 - Research Activity

This Dashboard provides the following graphs for each Columbia Academic Unit:

- 1) Federal Revenues Graphs
 - Presents historical and current year-to-date Federal Revenues by year. Federal Revenues are defined as Grants and Contracts revenue for all F Funds.
- 2) Total Revenues Graphs
 - Presents historical and current year-to-date total Grant and Contracts revenues. Total Revenues are defined as Grants and Contracts revenues for all Restricted Funds.
- 3) IDC Expense Graph
 - Presents historical and current year-to-date IDC Expense. IDC Expenses are defined as IDC Expenses (primarily account 59990) for all Current Funds.
- 4) IDC Revenue Received Graph
 - Presents historical and current year-to-date IDC Revenue. IDC Revenue is defined as IDC Revenue (primarily account 43000) for all Current Funds.

1.04 - Academic Tuition Summary

This Dashboard allows Academic units to view Budget vs. Actual Model Tuition by term.

System Dashboards

General Purpose:

The Dashboard App is designed to use various charts and graphs to provide end users with high-level overviews of financial and budget-related information.

2.01 - Historical Trend Graphs (System)

This Dashboard provides the following graphs for each System Institution:

- 1) Cumulative Month-End Fund Balance
- 2) Year-End Fund Balance
- 3) Cumulative Expenses
- 4) Monthly Expenses
- 5) Cumulative Revenue
- 6) Cumulative Contras & Transfers

2.02 - State Appropriations

This Dashboard provides the following State funding charts:

- 1) Section 1: UofSC
 - This displays the Part IA Recurring and the Non-Recurring CRF, Proviso, etc. information for each System Institution
- 2) Section 2: SC Higher Ed
 - This displays the Part IA Recurring and the Non-Recurring CRF, Proviso, etc. information for other SC Higher Ed institutions.

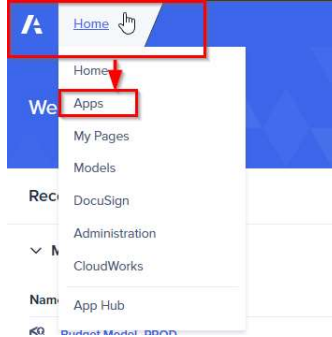
Timeline of Updates:

These reports contain real-time information; all GL data is updated nightly similar to the Finance Intranet. Units will be able to access and view these pages at any time throughout the year.

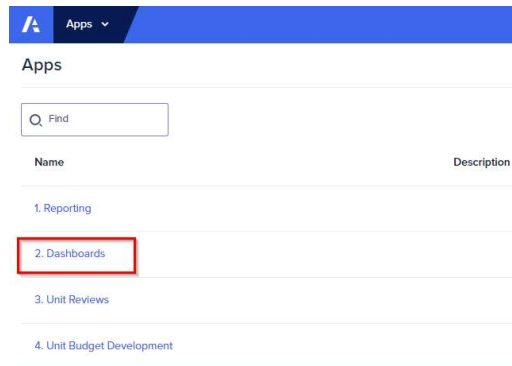
Process for Viewing Dashboard Pages:

Navigating to Apps Home Page:

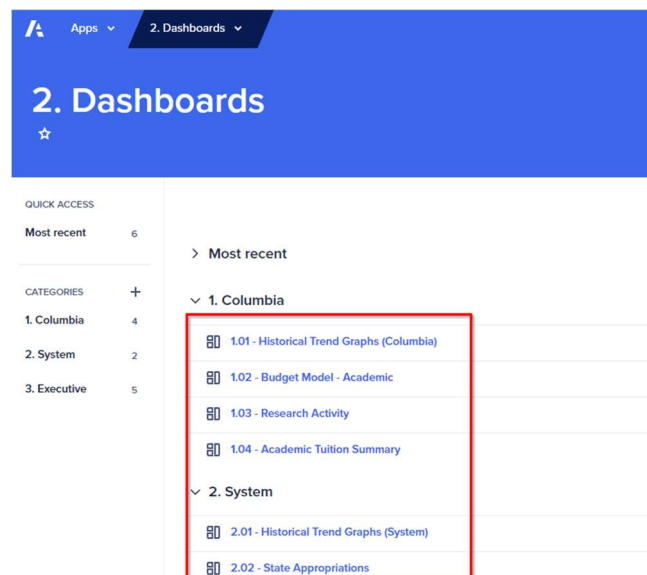
- 1) Once logged into Anaplan, use the dropdown list at the top left of the screen to navigate to the Apps Home Page.



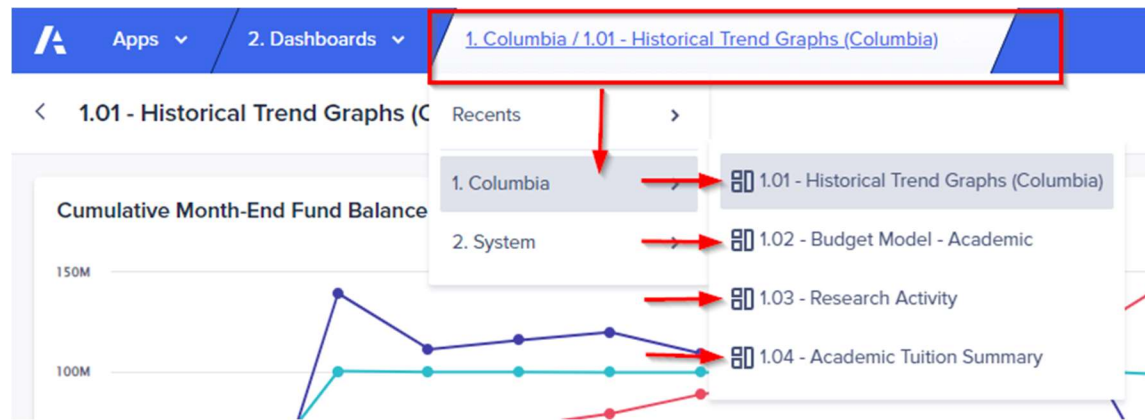
- 2) From the Apps home page, select the Dashboards link:



- 3) Select the desired page you wish to view from the list on the next page:



- 4) To navigate between reports, you can either repeat steps 1-3, or you can use the drop-down navigation at the top left of the screen.



Once a selection is made, refer below for how to navigate within the specified app page.

Navigating Within an App Page

Columbia Dashboards

1.01 - Historical Trend Graphs (Columbia)

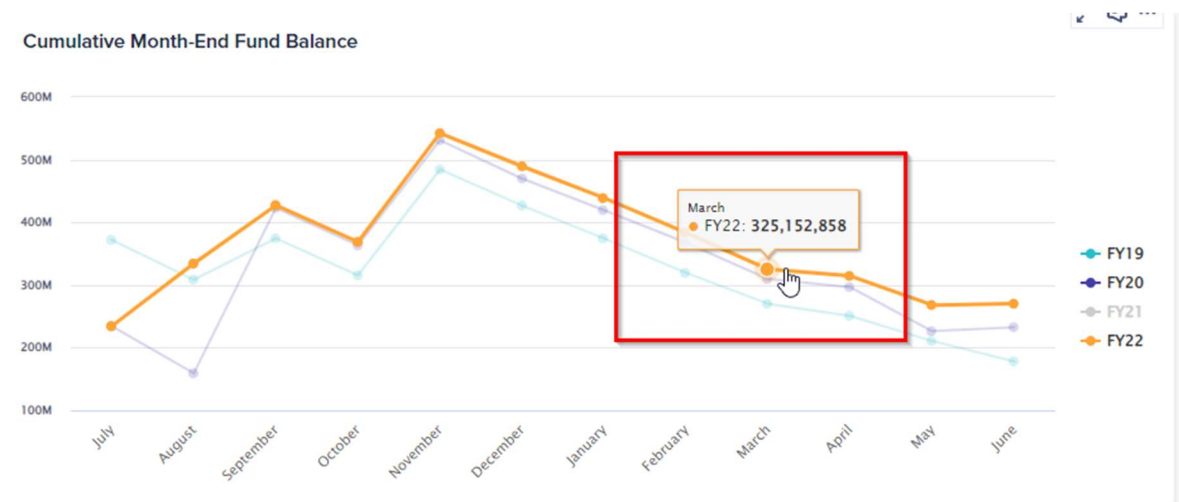
- Each graph on this page updates automatically in accordance with the two selectors at the top right-hand corner:



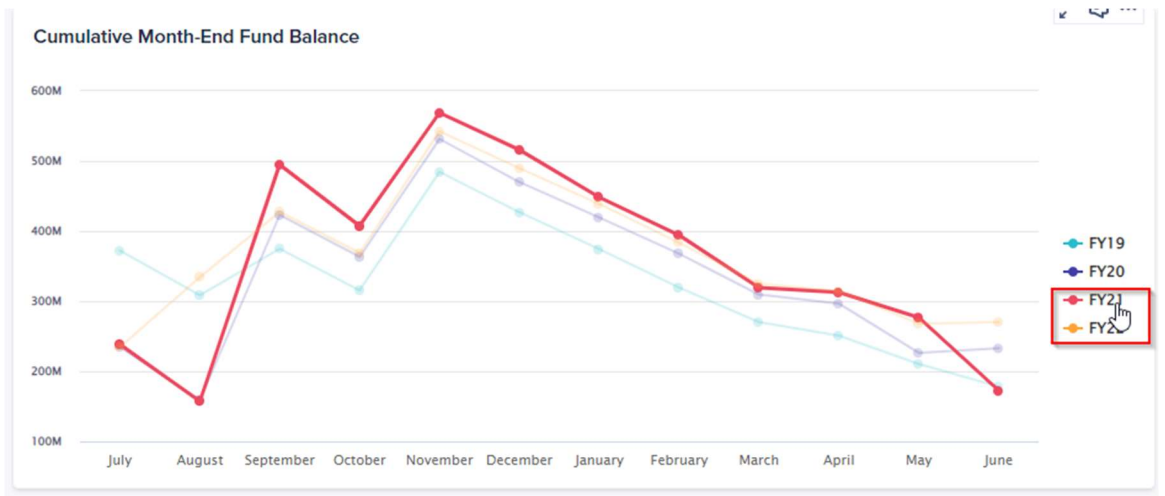
- Operating Unit Selector: allows users to view information for a specific Columbia operating unit
- Fund Selector: allow users to view specific fund types and/or fund roll-ups

2) Users are also able to adjust and interact with the graph displays as follows:

- a) Hovering your mouse over the lines/columns of the charts will display the data point values:



- b) Hovering over a column or line on a graph as well as the year indicator will bring it to the forefront for easier viewing.



c) Clicking on the year will disable it from the chart. The year will turn gray to indicate it has been disabled. Clicking the year again will re-enable the associated line or column.



1.02 - Budget Model - Academic

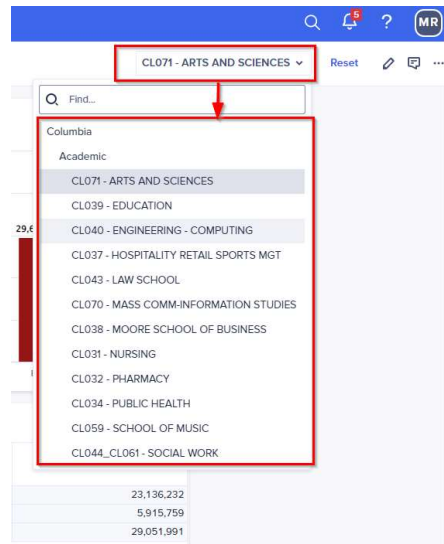
This Dashboard presents allocation metric and model allocation information based on the selected Academic Unit.

The screenshot shows a dashboard interface with a dropdown menu for 'Columbia Academic' units. The selected unit is 'CL071 - ARTS AND SCIENCES'. A table on the right shows the FY21 allocation metrics for various units.

Unit	FY21
CL071 - ARTS AND SCIENCES	241,789.00
CL039 - EDUCATION	7,090.00
CL040 - ENGINEERING - COMPUTING	161,861.00
CL037 - HOSPITALITY RETAIL SPORTS MGT	410,740.00
CL043 - LAW SCHOOL	3,675.00
CL070 - MASS COMM-INFORMATION STUDIES	3,030.00
CL038 - MOORE SCHOOL OF BUSINESS	6,705.00
CL031 - NURSING	417,445.00
CL032 - PHARMACY	150,620.00
CL034 - PUBLIC HEALTH	6,433.00
CL059 - SCHOOL OF MUSIC	90,062.00
CL044_CL061 - SOCIAL WORK	247,115.00
	7,960.00
	7,412.00
	15,372.00
	262,487.00

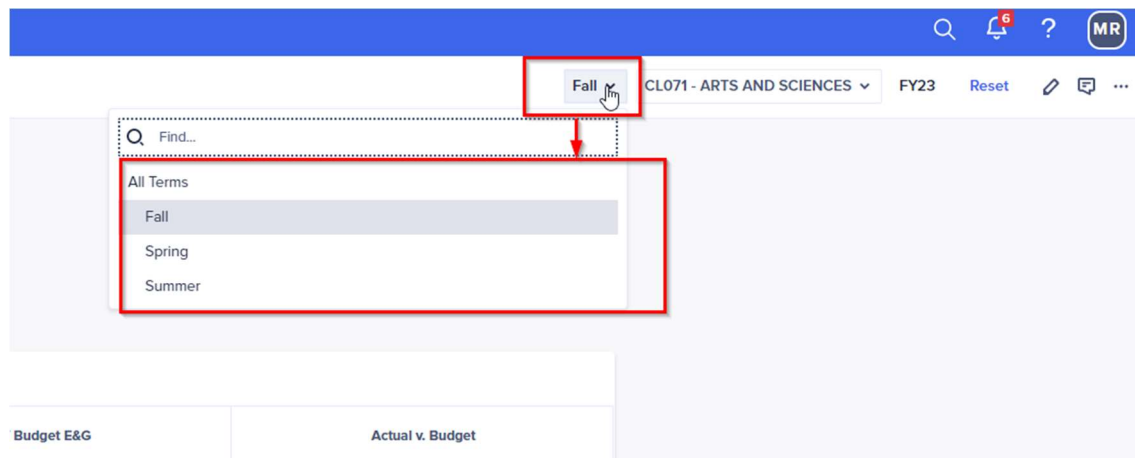
1.03 - Research Activity

This Dashboard presents research activity information based on the selected Academic unit.

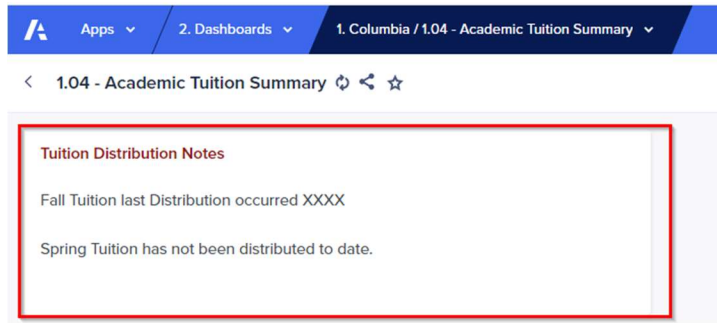


1.04 - Academic Tuition Summary

1. This Dashboard allows Academic units to view Budget vs. Actual Model Tuition by term. Using the term selector allows users to toggle between Fall, Spring, and All Terms.



- Tuition Distribution Notes provided by the Budget Office will be found in the top left card.



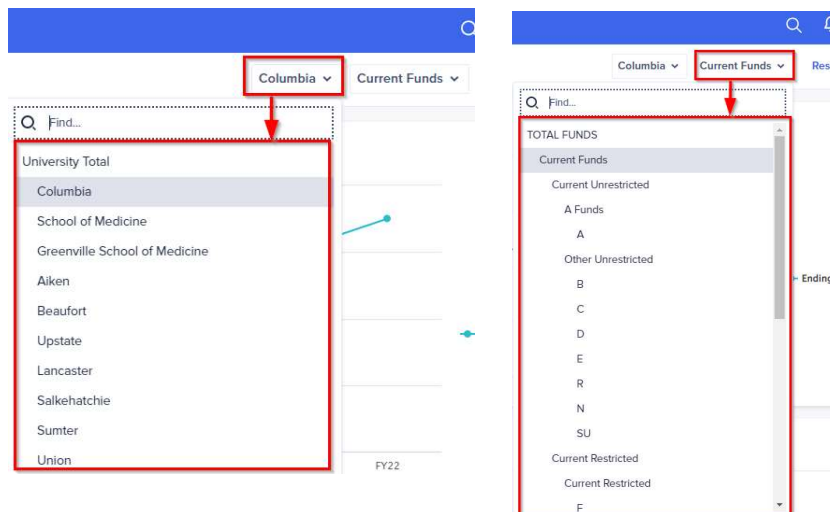
System Dashboards

2.01 - Historical Trend Graphs (System)

- Each graph on this page updates automatically in accordance with the two selectors at the top right-hand corner:



- System Institution Selector: allows users to view information for a specific System Institution
- Fund Selector: allow users to view specific fund types and/or fund roll-ups

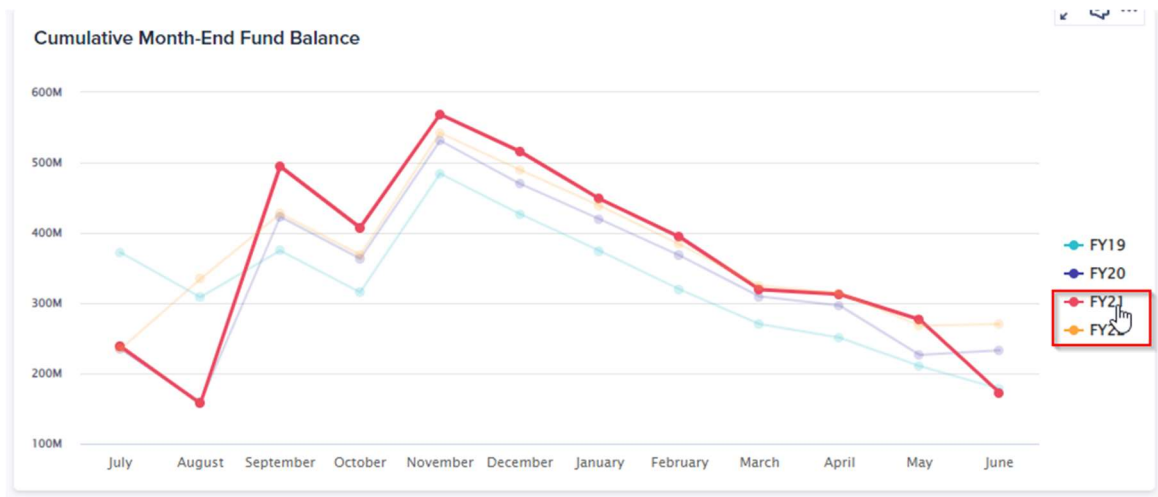


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- c) Clicking on the year will disable it from the chart. The year will turn gray to indicate it has been disabled. Clicking the year again will re-enable the associated line or column.



2.02 - State Appropriations

This page does not contain any selectors for navigation.