



All Funds Budget Implementation – Reporting Impacts

Existing Reporting Impacts:

| Dashboard Name | Dashboard Impacts | What Should I do? | Date of Implementation |
|---|--|---|--------------------------------|
| Non-Sponsored Projects Financial Trend Report | <ul style="list-style-type: none"> This report will be removed and will no longer be available | <ul style="list-style-type: none"> Document prompt customizations for use in Non-Sponsored Project LTD Actuals Trend | September 5 th |
| Sponsored Projects Financial Trend Report | <ul style="list-style-type: none"> This report will move to the Budget to Actual Reporting – Sponsored Projects Dashboard in the FMS Sponsored folder This report will only have one page, with labor and non-labor views available on the same page | <ul style="list-style-type: none"> Document customizations | September 5 th |
| Faculty Financial Summary | <ul style="list-style-type: none"> Non-Sponsored Projects section will be temporarily removed | <ul style="list-style-type: none"> Utilize other available Non-Sponsored reporting to provide updates to faculty | September 5 th |
| Budget Position Summary & Detail Report – Unrestricted Operating Budgets | <ul style="list-style-type: none"> <i>This page will remain available in EBI through FY19 close</i> Upon completion of close, dashboard will be removed and users should begin using Budget to Actual Reporting Dashboard | <ul style="list-style-type: none"> Use as normal through FY19 close Document customizations by end of September | End of September/Early October |
| Budget Position Summary & Detail Report – Non-Sponsored Projects | <ul style="list-style-type: none"> <i>This page will remain available in EBI through FY19 close</i> Data will only be available through 8/31/2019 Fiscal Year based budget to actual reporting will be available in the Budget to Actual Reporting Dashboard | <ul style="list-style-type: none"> Document customizations by end of September | End of September/Early October |
| Budget Position Summary & Detail Report – Sponsored Projects | <ul style="list-style-type: none"> <i>This page will remain available through FY19 close</i> Additional copies of this report will be available in Budget to Actual Reporting Dashboard, and Budget to Actual – Sponsored Projects | <ul style="list-style-type: none"> Rebuild customizations in either new dashboard by end of September | End of September/Early October |



| Dashboard Name | Dashboard Impacts | What Should I do? | Date of Implementation |
|--|--|--|--------------------------------|
| Budget Position – All Funds Summary | <ul style="list-style-type: none">• <i>This dashboard will remain available through FY19 close</i>• Data will only be available through 8/31/2019• Retrofitted version of this report will be available in the Budget to Actual Reporting Dashboard | <ul style="list-style-type: none">• Document customizations | End of September/Early October |
| Budget Position Summary by Operating Unit | <ul style="list-style-type: none">• <i>This dashboard will remain available through FY19 close</i>• Dashboard will then be removed and will no longer be available.• Retrofitted version of this report will be available in the Budget to Actual Reporting Dashboard | <ul style="list-style-type: none">• Document customizations | End of September/Early October |
| Unrestricted Operating Budgets Financial Trend Report | <ul style="list-style-type: none">• <i>This dashboard will remain available through FY19 close</i>• After FY19 close, this report will only be available in the Budget to Actual Reporting Dashboard• This report will only have 1 page with labor and non-labor views available on the same page | <ul style="list-style-type: none">• Document customizations immediately on non-labor page if they exist• Rebuild customizations on the Budget to Actual Reporting Dashboard | End of September/early October |
| Consolidated Performance Report | <ul style="list-style-type: none">• Current Budget to Actual for Unrestricted Operating Budgets in Financials Section will remain available through FY19 close.• Upon completion of FY19 close, Financials Section will provide All Funds Budget to Actual Reporting | <ul style="list-style-type: none">• No action needed | End of September/Early October |



New Reports:

| New Dashboard Name | New Dashboard Description | Date Available |
|---|--|---------------------------|
| Budget to Actual Reporting | This Dashboard will contain all budget to actual reporting, including an All Funds Summary, Operational Funds Summary (Funds 1xxx – 3xxx), Summary and Detail by Fund Category (UOB, NSP and SPP), and Fiscal Year Trends for UOB and NSP. This dashboard should be used as the primary reporting source for fiscal year budget to actual performance. | September 5 th |
| Non-Sponsored Projects LTD Actuals Trend | This dashboard provides a trend by fiscal year for actuals that have posted to non-sponsored projects. This dashboard is designed to assist in developing a budget for non-sponsored projects by enabling users to see past spending trends. | September 5 th |
| All Funds – Fund Balance Report (New Dashboard Page) | <p>**The existing dashboard page will remain the same**</p> <p>A new page has been added to the All Funds – Fund Balance report, the All Funds – Fund Balance Trend. This report provides a trend of fund balance by fiscal year, giving insight into the flow of funds over time in a given project.</p> | September 5 th |
| Budget to Actual Reporting – Sponsored Projects | Similar to the Budget to Actual Reporting dashboard, this dashboard is specific to Sponsored Projects and is located in the FMS Sponsored section of the Dashboards menu. This Dashboard will contain a summary and detail budget to actuals report, and a sponsored projects trend report. | September 5 th |