



Financial Administration Support Tool

Dashboard Manual

A user manual for the **FAST Dashboard** tool that offers instructions on how to create/customize a dashboard, and create/edit a pinned graph/chart.

Prepared by Finance Planning and Reporting

SEPT 2019 | 4.4.07.03 | 2000 SIMCOE ST OSHAWA, ON CANADA L1H 7K4 | 905-721-8668 | <http://www.uoit.ca/>

FAST DASHBOARD – USER MANUAL

TABLE OF CONTENTS

INTRODUCTION	2
CREATING A DASHBOARD	2
CREATING A PINNED GRAPH/CHART	4
GRAPH OPTIONS.....	5
CUSTOMIZING A DASHBOARD	7
EDITING DASHBOARD ITEMS	9

FAST DASHBOARD – USER MANUAL

INTRODUCTION

A dashboard will provide a graphical user interface relevant to particular business processes, objectives and tasks. Once a dashboard is created, it can house any number of charts, graphs and grids based on your Pinned Reports.

CREATING A DASHBOARD

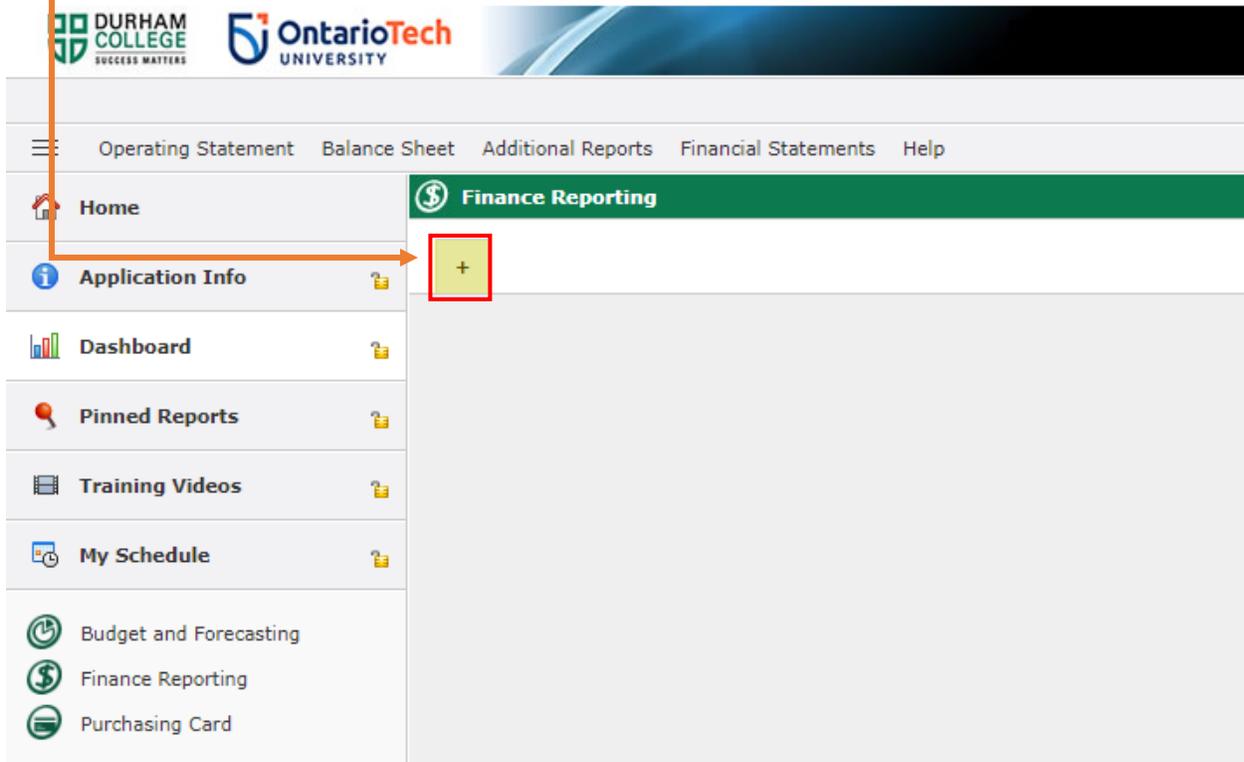
Login to FAST @ <http://fast.uoit.ca>

On the FAST home page click on the **Dashboard** button.

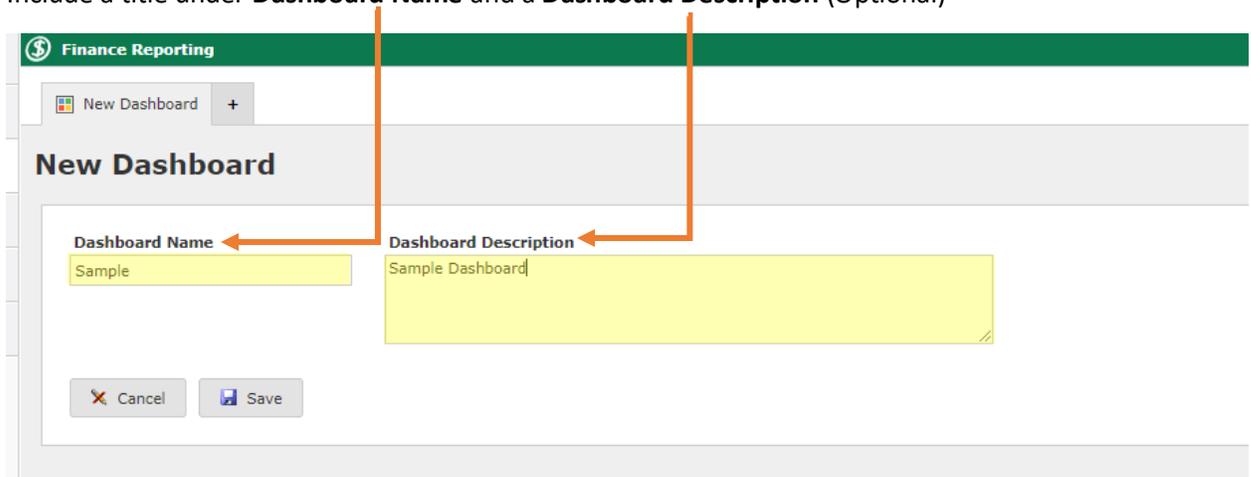
The screenshot displays the FAST dashboard interface. The top navigation bar includes links for Operating Statement, Balance Sheet, Additional Reports, Financial Statements, and Help. The left sidebar contains a menu with options: Home, Application Info, **Dashboard** (highlighted with a red box), Pinned Reports, Training Videos, My Schedule, Budget and Forecasting, Finance Reporting, and Purchasing Card. The main content area is titled 'Finance Reporting' and contains a form for inputting report parameters. A text box above the form reads: 'Please input your desired report parameters. You can click on the magnifying glass to lookup a field.' The form fields include: Chart(s) (with checkboxes for C - Durham College, D - Durham College, and U - UOIT), Index, Fund, Orgn, Acct, Prog, Actv, Locn, Fund.Fin.Mgr, Orgn.Fin.Mgr, Fund Type, Acct Type, Fiscal Period (set to Sep-2019 (Open)), and Report (set to Operating Statement). There are 'Reset Parameters' and 'ENTER' buttons at the bottom of the form. A help box at the bottom of the form provides instructions: '? If you prefer you can simply leave all the input boxes blank and click the ENTER button. This will produce a report summarizing all of your accounts. Note: You can enter multiple values in any field by separating them with a comma. You can also enter a range in any field by separating the two values with a colon. You can also use the % character as a wildcard.' The 'millennium' logo is visible in the bottom left corner of the page.

FAST DASHBOARD – USER MANUAL

Click the **+** button to create a new Dashboard. By default, this will auto-label as "New Dashboard" until you provide a new Dashboard Name.



Include a title under **Dashboard Name** and a **Dashboard Description** (Optional)



FAST DASHBOARD – USER MANUAL

CREATING A PINNED GRAPH/CHART

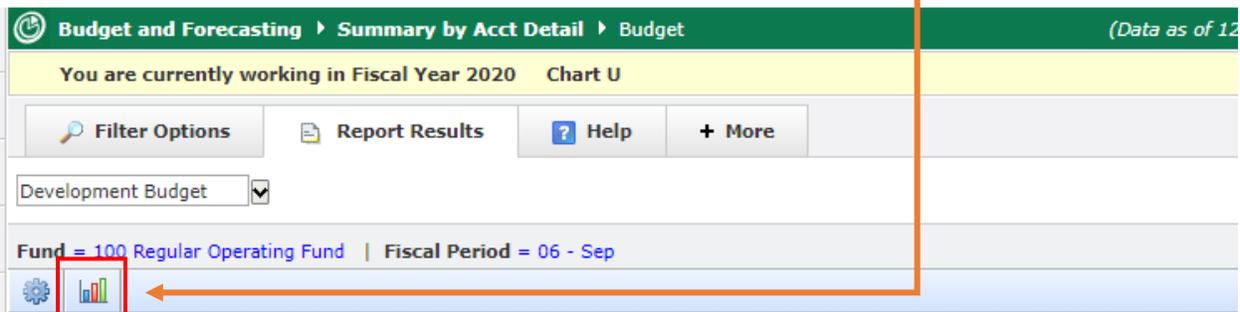
The next step is to create a graph/chart.

Run any FAST report you would like to create a graph/chart from.

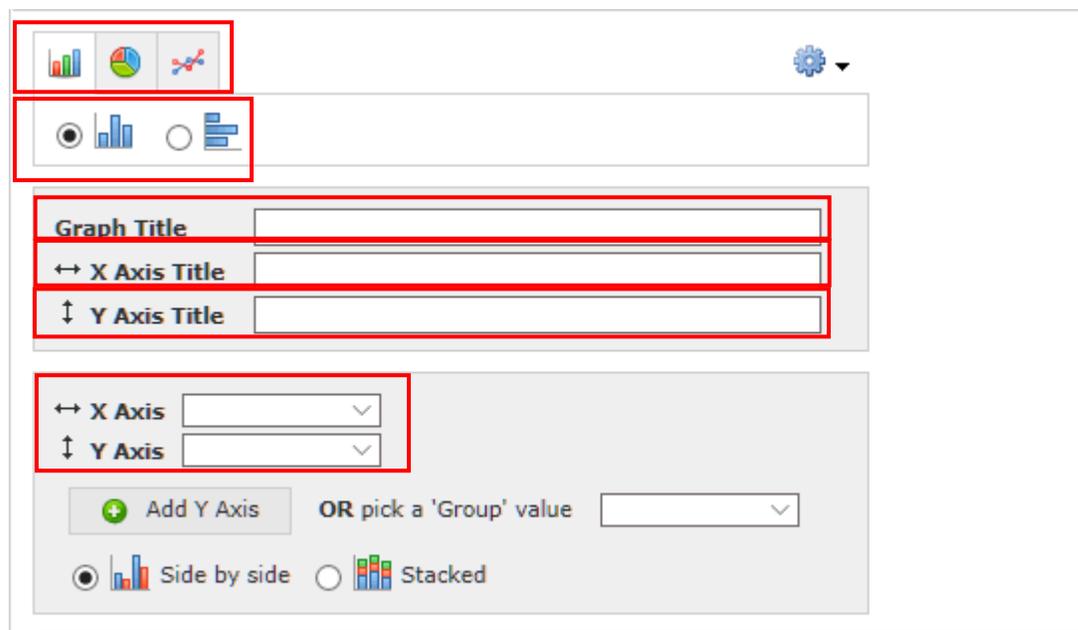
Once you have executed a report, one of the options is to graph it, and make it accessible on your Dashboard. Let's start with a basic example.

An important rule when it comes to graphing is that at least one of your variables (called the Y-Axis) must be a numeric field. For this reason, your report (or dataset) may need a bit of work before it's ready to be graphed.

When you have a data set that is ready to begin graphing, click on the **graph icon** on the toolbar ribbon:



The graph Options worksheet will open just above the data grid. You will still see both panes open at the same time as you begin to build your graph.



GRAPH OPTIONS

Graph Type: You can choose from bar chart, pie chart (which includes donut graph) or line chart

Orientation: For bar charts, you can choose whether the graph will display as a standard vertical bar chart or as a horizontal bar chart

Graph Title: Include a meaningful title for the graph (please note that the Pinned Report title will be separate and is saved at a later step; these do not have to be the same, but can be)

X-Axis Title: Include a title for your X-Axis

Y-Axis Title: Include a title for your Y-Axis (more than one if applicable)

X-Axis field selection: In this drop-down, choose which field will contain the X-Axis data

Y-Axis field selection: In this drop-down, choose which field will contain the Y-Axis data (note: only numeric fields will appear here)

You may also select the button to add an **additional Y-Axis** if necessary; this will automatically open up another line.

The screenshot shows the 'Graph Options' configuration panel. At the top, there are two dropdown menus for 'X Axis' and 'Y Axis'. Below these are two red-bordered boxes: one containing a green plus icon and the text 'Add Y Axis', and another containing the text 'OR pick a 'Group' value' followed by a dropdown menu. Below these are two radio button options: 'Side by side' (selected) and 'Stacked'. Orange arrows point from the text above to the 'Add Y Axis' button, the 'OR pick a 'Group' value' dropdown, and the 'Side by side' radio button. Below the screenshot, there is explanatory text and a final instruction.

Or, you may also choose a value to "Group" by using **'Group' value**, creating a new style of graph.

For Grouping, choose between the **Side by Side** or the **Stacked** options.

FAST DASHBOARD – USER MANUAL

Using the **Gear** button, you can also change the Label Direction (Horizontal or Vertical) and the Legend Position (Right, Left, Top, Bottom):



The Graph will preview itself in the top right corner.

The graph needs to be pinned to be saved. Select **“Create a new pinned report”** to save it.

Acct**	Title	Annual Adjusted Budget ↓	Sep-2019/ Month Actual	Sep-2019/ YTD Actual	O/S Commitments	YTD Total Activity	Budget Available	Budget Fav/Unfav
Supplies & Expenses								
71A	Supplies & Expenses	414,437	1,683	130,851	88,953	219,804	194,633	47% F
71B	Capital Expenses	0	0	1,026	2,682	3,708	-3,708	U
	Subtotal	414,437	1,683	131,877	91,634	223,512	190,925	46.1% F
Interest Expense								
75A	Interest Expense	432,988	0	0	0	0	432,988	100% F
75B	Interest Expense - Debt Oblig...	583,419	0	246,496	0	246,496	336,923	57.7% F

FAST DASHBOARD – USER MANUAL

In the Save As pop up, click off both “**Make Graph Available on Dashboard**” and “**Make Grid Available on Dashboard**”. Then click **Save**.

Save As...

Report Name: Sample Report

Description (Optional): Sample report

Display on Export:

Make Graph Available on Dashboard

Make Grid Available on Dashboard

Cancel Save

A Grid is the FAST Report the graph is based on.

CUSTOMIZING A DASHBOARD

Go back to **Dashboard**

DURHAM COLLEGE SUCCESS MATTERS

OntarioTech UNIVERSITY

Return to Summary by Hierarchy - Current Year (11:03:01 AM) Return to Report

Operating Statement Balance Sheet Additional Reports Financial Statements Help

Home

Application Info

Dashboard

Pinned Reports

Training Videos

My Schedule

Budget and Forecasting

Finance Reporting

Purchasing Card

Finance Reporting

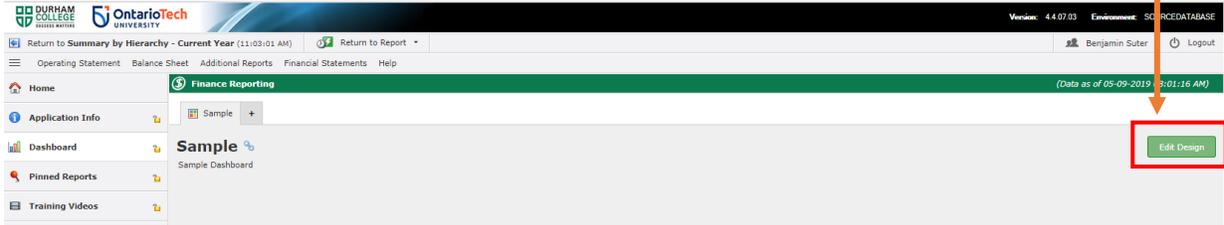
Sample +

Sample

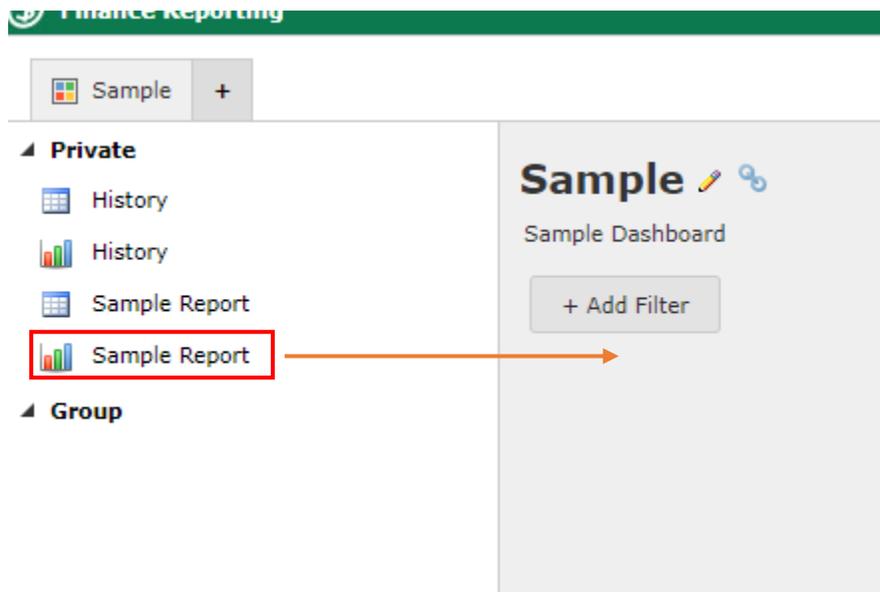
Sample Dashboard

FAST DASHBOARD – USER MANUAL

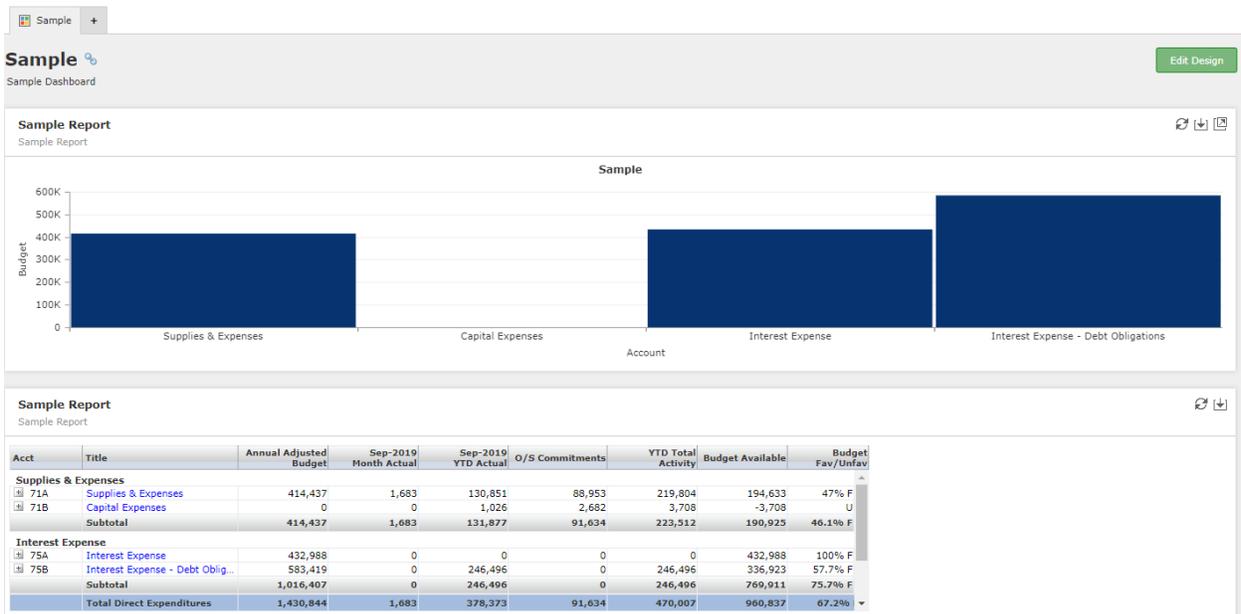
Click on **Edit Design**



Click and drag your choice of graph or grid onto the dashboard “greyed” area that you want it to display.



Your graph/grid will be displayed on the right hand side.



FAST DASHBOARD – USER MANUAL

EDITING DASHBOARD ITEMS

-  Shrink Horizontally
-  Delete Graph
-  Refresh
-  Export to PDF
-  Full Screen

If you want your Dashboard to appear 1st every time you log on to FAST Reporting, click on the **lock**. It is now locked and your dashboard will come up as a homepage when you click on FAST Reporting.

