



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

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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.

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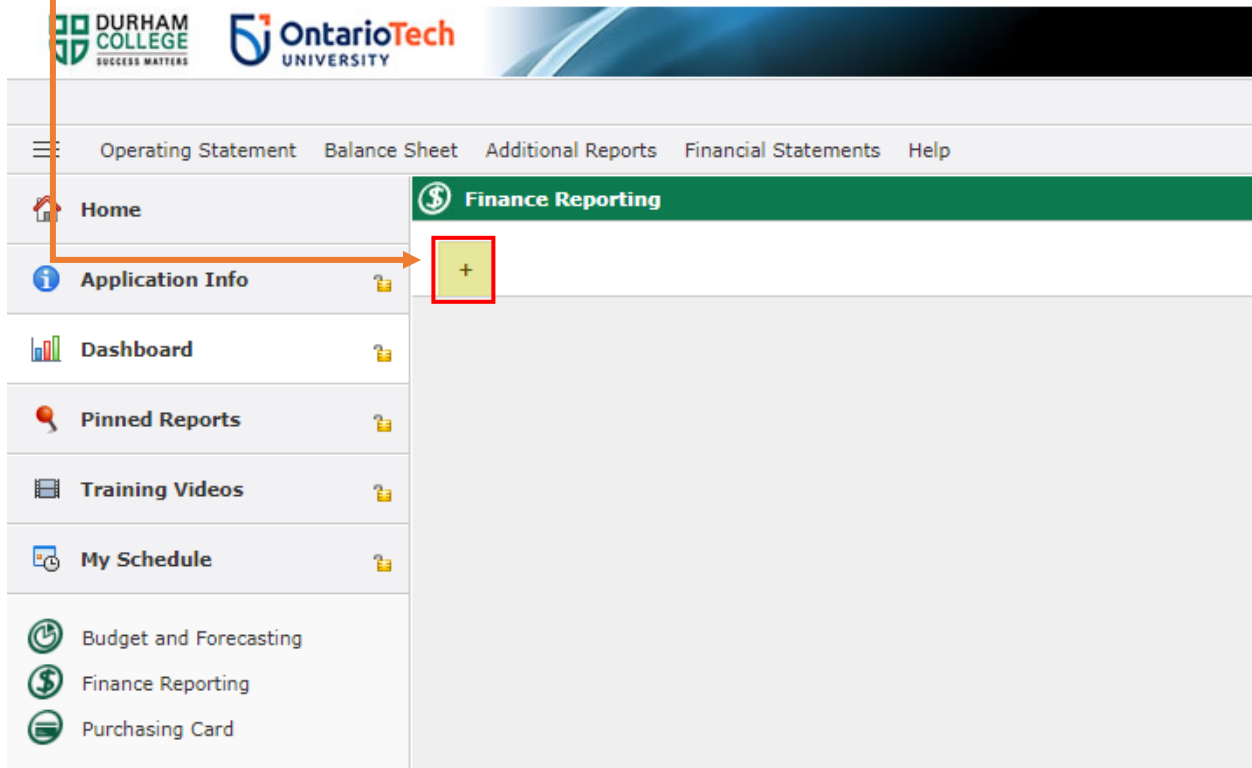
FAST Dashboard Interface:

- Navigation Menu:** Home, Application Info, **Dashboard** (highlighted), Pinned Reports, Training Videos, My Schedule, Budget and Forecasting, Finance Reporting, Purchasing Card.
- Finance Reporting Section:**
 - Chart(s):** ☐ C - Durham College, ☐ D - Durham College, ☒ U - UOIT
 - Index:** [Input Field]
 - Fund:** [Input Field]
 - Orgn:** [Input Field]
 - Acct:** [Input Field]
 - Prog:** [Input Field]
 - Actv:** [Input Field]
 - Locn:** [Input Field]
 - Fund.Fin.Mgr:** [Input Field]
 - Orgn.Fin.Mgr:** [Input Field]
 - Fund Type:** [Input Field]
 - Acct Type:** [Input Field]
 - Fiscal Period:** Sep-2019 (Open) [Dropdown]
 - Report:** Operating Statement [Dropdown]
- Buttons:** Reset Parameters, ENTER
- Instructions:**
 - Please input your desired report parameters. You can click on the magnifying glass to lookup a field.
 - 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.

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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)

The screenshot shows the 'New Dashboard' form. At the top, there is a green bar with the 'Finance Reporting' icon and label. Below this is a button labeled 'New Dashboard' with a '+' sign. The form has two main sections: 'Dashboard Name' and 'Dashboard Description'. The 'Dashboard Name' field contains the text 'Sample'. The 'Dashboard Description' field contains the text 'Sample Dashboard'. Both fields are highlighted with yellow boxes. Orange arrows point from the text above to these fields. At the bottom of the form are two buttons: 'Cancel' and 'Save'.

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CREATING A PINNED GRAPH/CHART

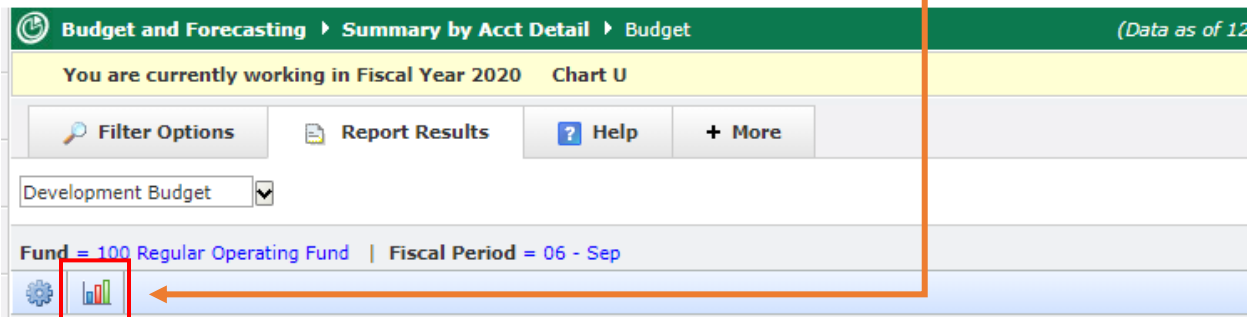
The next step is to create a graph/chart.

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

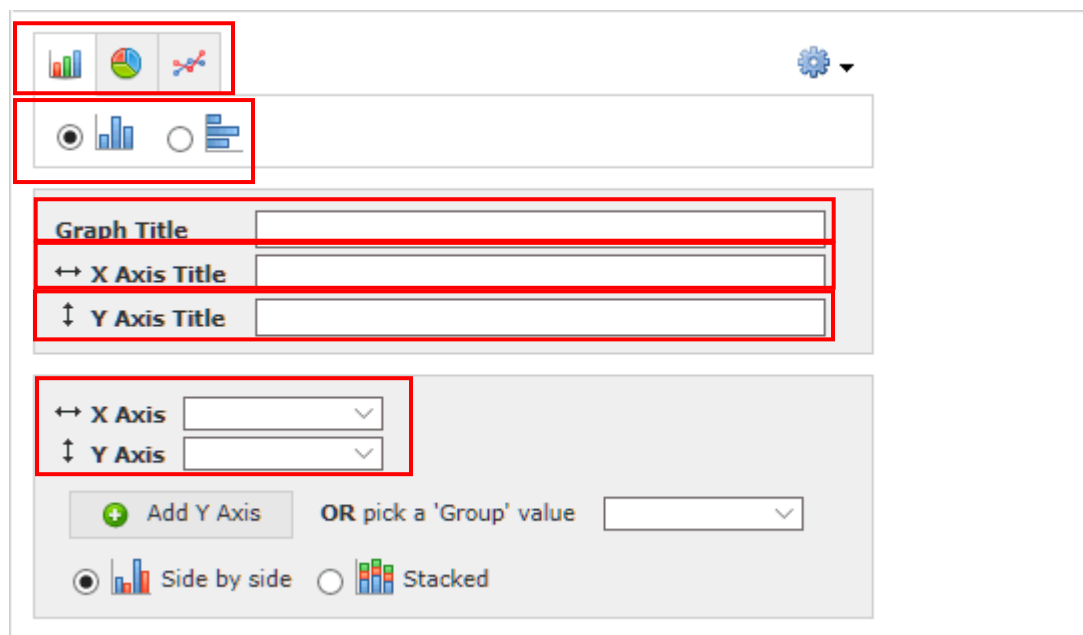
Once you have executed a report, one of the options is to graph it, and make it accessible on your Dashboard. Let's start with a basic example.

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.



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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' interface. At the top, there are two drop-down menus: 'X Axis' and 'Y Axis'. Below these, there is a button labeled '+ Add Y Axis' and a text label 'OR pick a 'Group' value' followed by another drop-down menu. At the bottom, there are two radio button options: 'Side by side' (selected) and 'Stacked'. Red boxes highlight the '+ Add Y Axis' button, the 'OR pick a 'Group' value' text and drop-down, and the 'Side by side' and 'Stacked' options. Orange arrows point from the text 'You may also select the button to add an additional Y-Axis if necessary; this will automatically open up another line.' to the '+ Add Y Axis' button, and from the text 'Or, you may also choose a value to "Group" by using 'Group' value, creating a new style of graph.' to the 'OR pick a 'Group' value' drop-down. Another orange arrow points from the text 'For Grouping, choose between the Side by Side or the Stacked options.' to the radio button options.

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

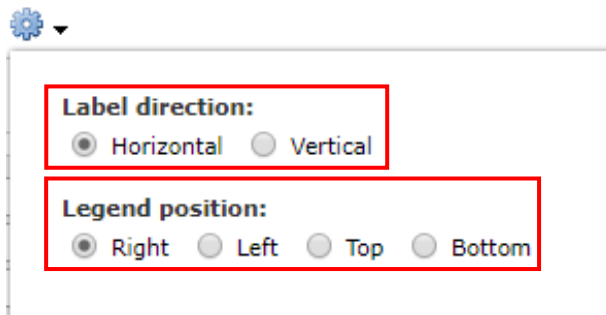
For Grouping, choose between the **Side by Side** or the **Stacked** options.

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



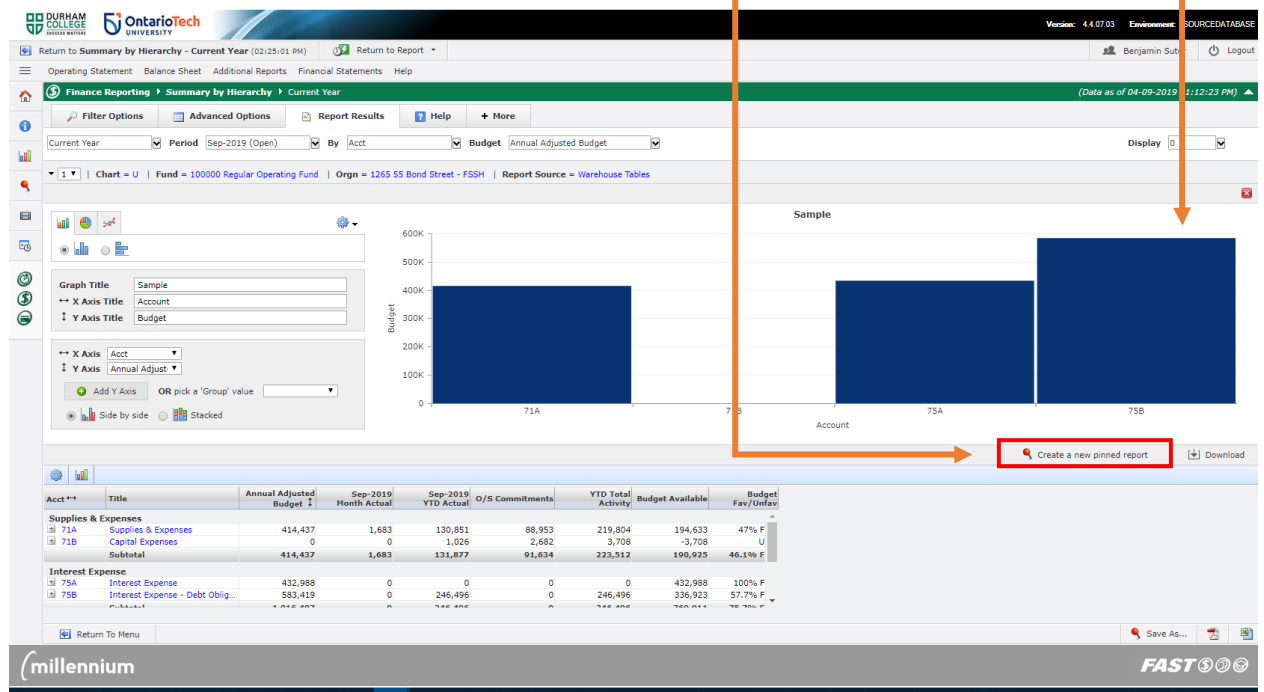
The screenshot shows the top section of the FAST dashboard. On the left, there are icons for different chart types: a bar chart, a pie chart, and a line chart. On the right, there is a Gear icon (settings) which is highlighted with a red box. Below these icons, there are input fields for 'Graph Title', 'X Axis Title', and 'Y Axis Title'.



The screenshot shows the Gear menu that appears when the Gear button is clicked. It contains two sections: 'Label direction:' with radio buttons for 'Horizontal' (selected) and 'Vertical'; and 'Legend position:' with radio buttons for 'Right' (selected), 'Left', 'Top', and 'Bottom'.

The Graph will preview itself in the top right corner.

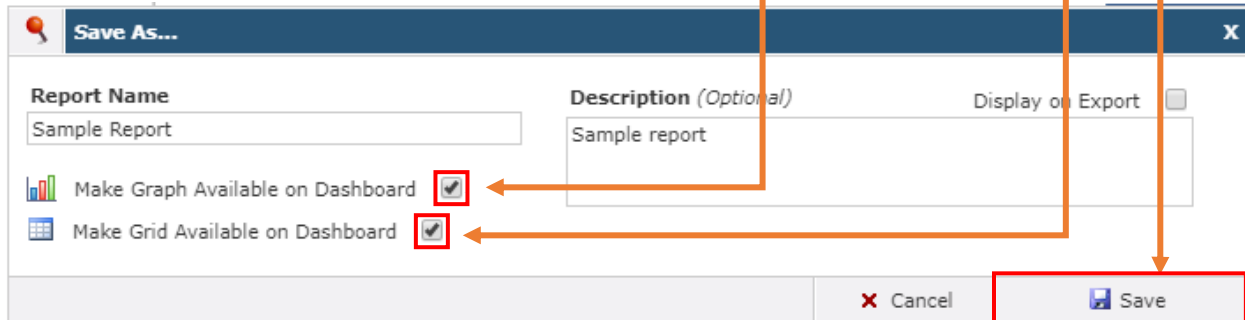
The graph needs to be pinned to be saved. Select **“Create a new pinned report”** to save it.



The screenshot shows the main FAST dashboard interface. At the top, there is a navigation bar with 'Return to Summary by Hierarchy - Current Year' and 'Return to Report'. Below this, there are tabs for 'Operating Statement', 'Balance Sheet', 'Additional Reports', 'Financial Statements', and 'Help'. The main content area displays a bar chart titled 'Sample' with the X-axis labeled 'Account' and the Y-axis labeled 'Budget'. The chart shows four bars for accounts 71A, 71B, 75A, and 75B. Below the chart, there is a table with columns: 'Acc't', 'Title', 'Annual Adjusted Budget', 'Sep-2019 Month Actual', 'Sep-2019 YTD Actual', 'O/S Commitments', 'YTD Total Activity', 'Budget Available', and 'Budget Fav/Unfav'. The table contains data for 'Supplies & Expenses' and 'Interest Expense'. At the bottom right of the dashboard, there is a button labeled 'Create a new pinned report' which is highlighted with a red box. An orange arrow points from the text above to this button.

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

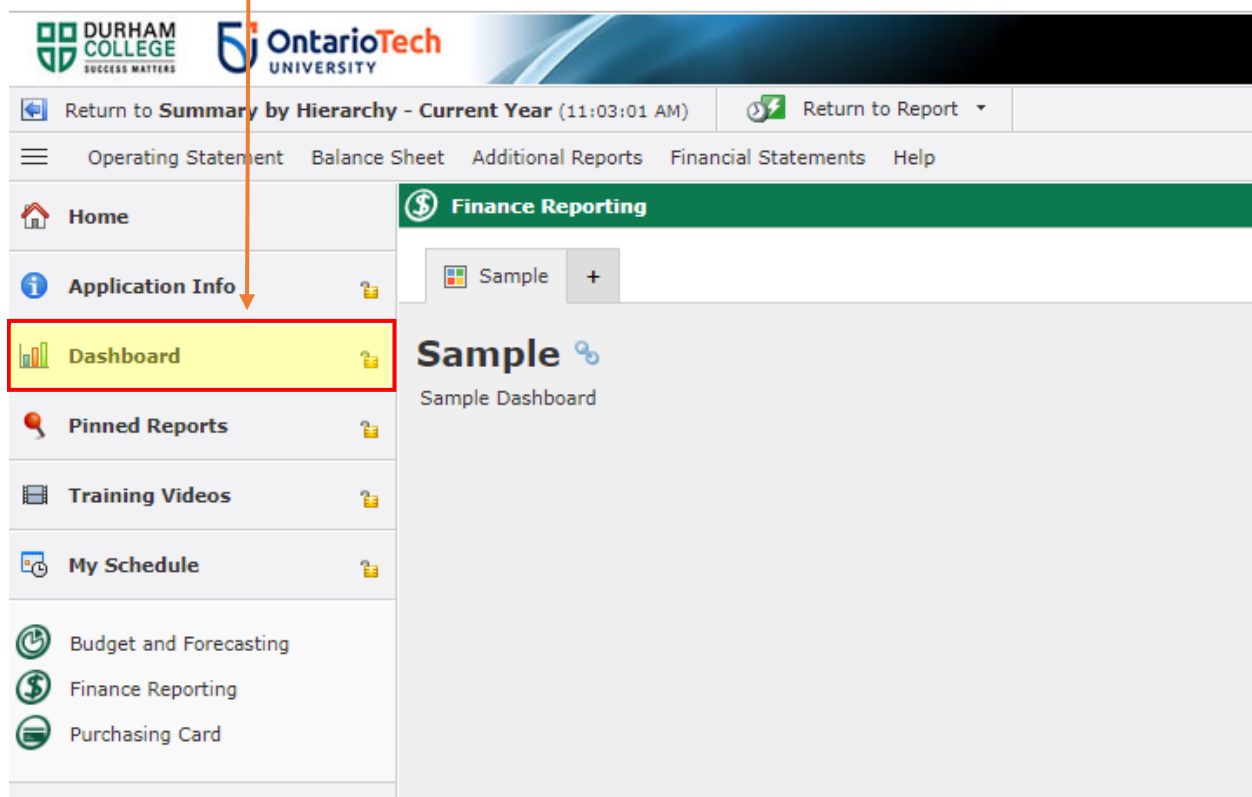


The screenshot shows the 'Save As...' dialog box. It has a title bar with a red pin icon and the text 'Save As...' and a close button 'X'. The dialog contains two text input fields: 'Report Name' with the value 'Sample Report' and 'Description (Optional)' with the value 'Sample report'. To the right of the description field is a 'Display on Export' checkbox. Below these fields are two checkboxes: 'Make Graph Available on Dashboard' and 'Make Grid Available on Dashboard', both of which are checked. At the bottom right are 'Cancel' and 'Save' buttons. Orange arrows point from the text above to the two checkboxes, and a red box highlights the 'Save' button.

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

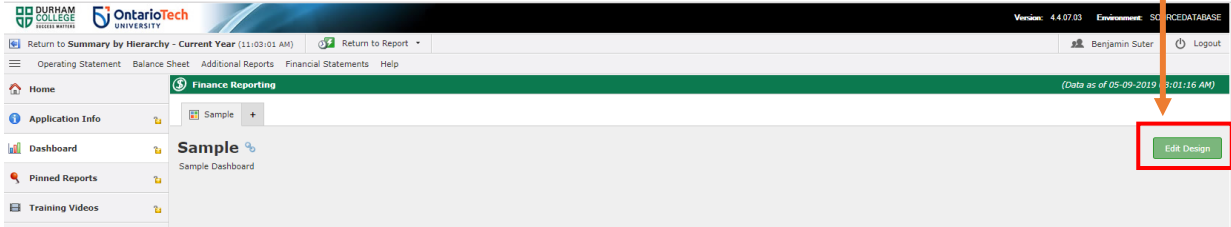
CUSTOMIZING A DASHBOARD

Go back to **Dashboard**

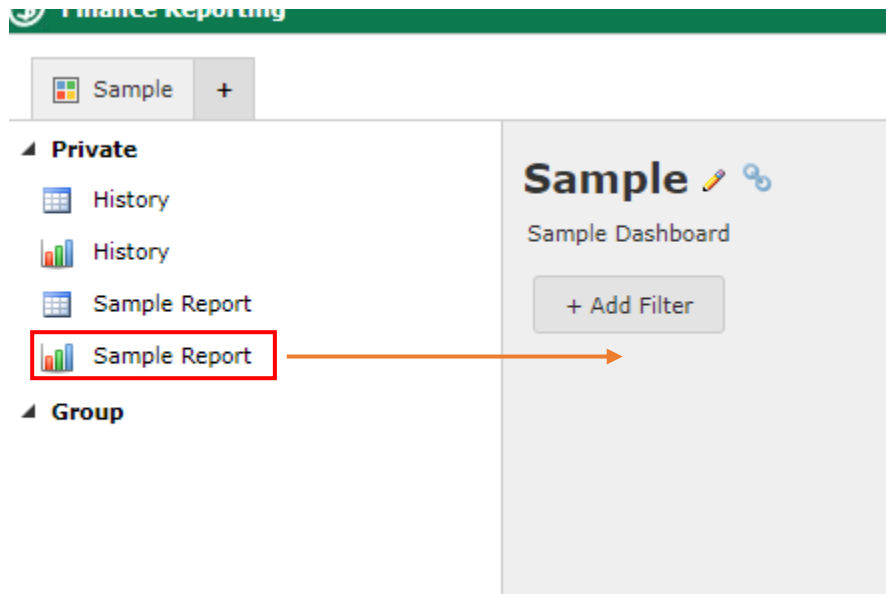


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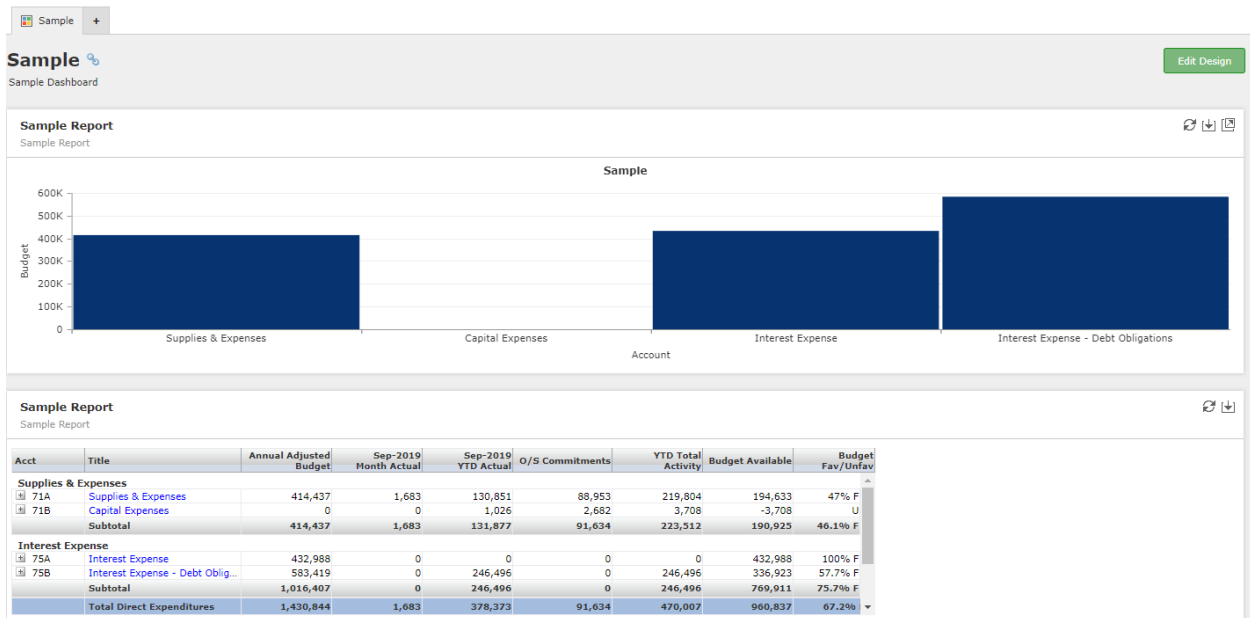
Click on **Edit Design**



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.



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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.

