Fund Deficits Dashboard Instructions

Steps to gain access to the Fund Deficits Dashboard

1. You will first need to go to the Dashboards website by following the link below:
   b. Click on the UND Internal Dashboard logo

   Please select a Dashboard

   This will bring you to a new page and you will see on the right hand side where it says “Sign-In to Access UND Internal Dashboard”

   Sign-in to Access
   UND Internal Dashboards

   d. Click on it and this will bring you to a sign in page
      i. If you would like you can add the URL to your favorites, you will not have to do steps a. – d. every time

2. Now you will need to sign-in
   a. You should be able to sign-in using the username and password that you use for PeopleSoft
   b. If you are unable to sign in you need to contact Sharon Loiland

3. Finding the Fund Deficits Dashboard
a. You will see at the top of the page a drop-down called or “UND Finance & Operations Deficits”

b. Click on Fund Deficits and click on it

4. Displaying the Dashboard Chart
   a. Click on “Show Dashboard”, this will bring you to the actual dashboard page

   Please enter dashboard parameters. Required parameters are identified with an asterisk (*).

   Lookup Name*

   Lookup Contact*

   Show Dashboard

b. The page will look like this, click on the link “Master List of Fund Deficits”

Review column E or F of the spreadsheet called master-list-fund-deficits and this will give you the lookup name or contact that will be used to filter the dashboard.

You will not type in the individual Fund in this box
   i. You will search by division or college or by the contact name
      1. For example, if you are a part of Athletics, you would type in Athletics, not a specific fund associated with Athletics
      2. You can also type in you name to filter the dashboard. (Does not have to be your full name)
   ii. Once you have figured out what you assigned to, type the lookup name or contact in the box and click show dashboard (YOU CAN ONLY DO ONE FILTER)
      1. You must click on the button, you cannot use the enter key on your keyboard
   iii. A chart should show up on your screen displaying all the fund you are assigned to that has a deficit
      1. NOTE: this dashboard does not show funds that are not deficits

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5. Exporting the Data
   a. Once you have found your deficits you can export the data to Excel if you’d like
      i. You can do this by right-clicking on the chart and clicking on “Export Chart Data”
      ii. Click on open at the bottom of the screen and an Excel file will open up.