#### Faculty Account Dashboard (FAD)

#### About:

- The FAD is an online reporting tool. It was developed to replace the paper reports that faculty
  once received to keep track of their financial accounts, but which are no longer available due to
  changes in the University's systems. The FAD provides information about all individual Faculty
  accounts, including a Summary Spending Overview, Expenditure Details, Transaction Details,
  and Commitment Details.
- The FAD is a web-based portal using Qlik Sense. It can be accessed using any type of browser on any platform. The FAD reports transaction and commitment details from UVA Integrated System. Individual accounts are maintained in a database.
- The FAD Landing Page Link: Faculty Account Dashboard

### Accounts:

- Accounts are defined by a PTAO combination.
- Accounts include all account types, local, grant, endowment, gift, etc.
- Your accounts can only be viewed by you and departmental finance staff.
- Budgets Account budgets have been pre-loaded from UVA Integrated System and can only be
  modified by the Department Administrator, Jeff Behrend.
   By default, Account Names are: Project Number Project Name. Upon request, you can have
  your Account Names changed to something you find more convenient or easily identifiable. Just
  tell Jeff what names you would like, and he will make the changes.

### Using FAD:

- Qlik Sense is a smart and user-friendly analytics tools that can instantly generate personalized reports and very detailed information dashboards.
- The Faculty Account Dashboard is highly customizable. Each user can customize their views, pages, etc.
- Data can be filtered, sorted and outputted to a variety formats including Excel and Adobe.
- As with any new application, you should take some time to navigate around the FAD to learn how you can quickly obtain the information that is most useful to you for reviewing your accounts.

### Pages:

- The landing page is the "Spending Overview". This is a summary Budget Balance Available, showing the budget, expenditures "Actuals" and remaining balance of your accounts. The default view shows these figures before commitments. By selecting the "After Commitments" button, you can add the commitments, which will re-calculate the balance after commitments.
- Navigation Note: you may need to use vertical or horizontal slider bars to view all the information in the Tables appearing on the various pages. Those bars are only visible (as thin gray bars on the right and/or bottom of a given table) when you place your cursor within the

- table of interest. If you want them to be visible all the time, turn your touch screen mode to on (see below).
- Use the filter options appearing on the far left of the page (accounts, fiscal period, expenditure type, etc.) to restrict the information provided in tables and graphs. Filters that are applied in the current view are identified in small tabs on a horizontal bar near the top of the page.

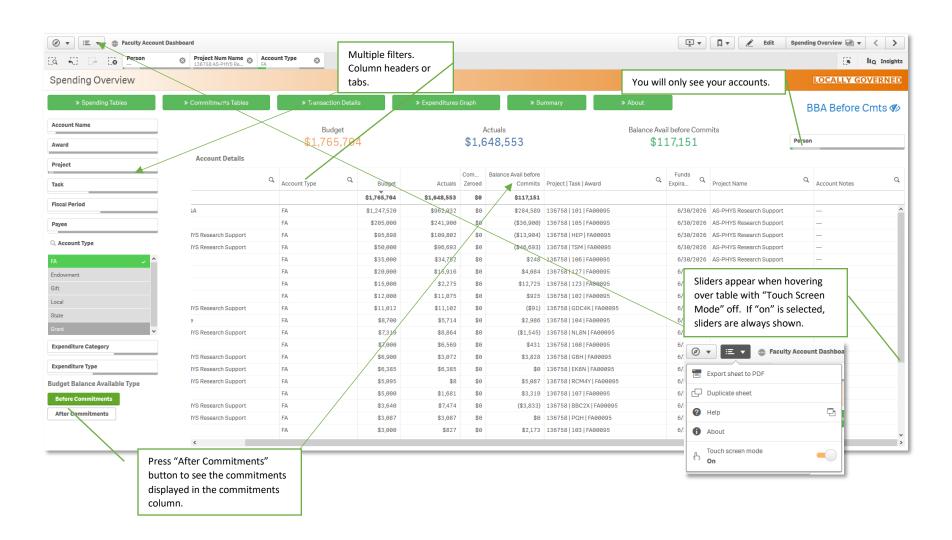
  Remember to close those filters (click on the x in the small tab at the top of the page) when you no longer want them to restrict the information you see in charts and tables.
- Different pages are accessed using the green tabs near the top of the page. The "Spending Tables" page provides spending data by category, expenditure type, payee and shows an expenditure table by month for each Payee.
- Commitments Tables provides the same data analysis as in the Spending Tables but applies to your "planned expenses".
- The "Transaction Details" page gives a list of all the transactions on that account and can be filtered for any time frame you want.
- The "Actual Expenditures Graph" provides a bar graph of actuals by expenditure category.
- The "Summary Page" is also a bar graph of actuals, commitments, and budget for each account.

#### Additional Help and Feedback:

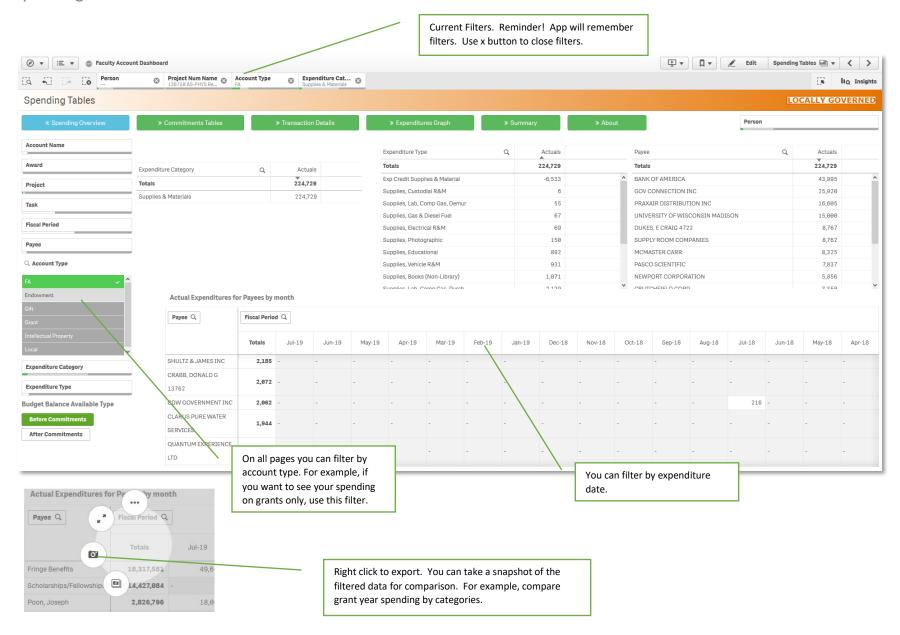
After you have spent some time with FAD, please contact Jeff with any questions you may have on how to use it to provide you with the information you need to properly follow you accounts. Suggestions for improving the tool for the faculty are also welcome.

# Spending Overview Page:

Initial landing page. An account summary showing the budget, expenses (actuals) and balance.



# Spending Tables:



## Commitments Tables:

