General Accounting Dashboard

This guide will cover:

- Navigating and recommended view uses for the General Accounting Dashboard.

Steps 1-3 outline the basic functionality of the General Accounting Dashboard. After step three are two recommended ways to utilize the views available.

Step One
Log-in to WyoCloud Financial Management and navigate to the General Accounting Dashboard.
- From WyoWeb, select Financial Management under WyoCloud
- Upon logging in, the WyoCloud homepage will be displayed.
- Use the navigator (three bars in the upper left corner) to select General Accounting Dashboard.
**Step Two**
For campus users, the most useful portion of the General Accounting Dashboard is the Account Monitor located at the top of the page. First you’ll set your view in the Account Monitor.

- In the Account Monitor box, click View then Account Group and Create.

- On the Create Account Group page the following fields are required:
  - **Name:** Create a name that will be easy to identify the account the view is created for in the future.
  - **Display in:** Account Monitor (default)
  - **Set as default (optional):** if you would like this view to always be listed on the main General Accounting Dashboard upon accessing.
  - **Time Option:** Accounting period
  - **Comparison Option:**
    - **Budget PTD:** Compares what was budgeted for the period to actuals posted to the general ledger for the period.
    - **Budget QTD:** Compares what was budgeted for the quarter to actuals posted to the general ledger for the quarter.
    - **Budget YTD:** Compares what was budgeted for the year to actuals posted to the general ledger for the year to date. *(Recommended. See step 3 for full list of recommendations)*
    - **Prior Period PTD:** Compares actuals from the prior year for the period to actuals posted to the general ledger in the current period.
    - **Prior Year QTD:** Compares actuals from the prior year for the quarter to actuals posted to the general ledger in the current quarter.
    - **Prior Year YTD:** Compares actuals from the prior year for the year to actuals posted to the general ledger for the current year to date.
  - **Access:** Private
In the Accounts area, you will add the account information you’d like displayed in the view. Click the plus sign (+) to add an account row.

In the Ledger field, use the drop down to select University of Wyo US then continue completing the desired chart string.
- All segments of the chart string are required. It is recommended to just enter the desired organization and select all for other segments.
- If desired additional accounts may be added by clicking the plus sign (+) again.
- Once all segments of the chart string are entered, Save and Close using the drop down next to Save.
Step Three
Using the Account Monitor.

- After Saving and Closing, you will return to the General Accounting Dashboard. The selected account information will display in the **Account Monitor**.

- If you have set up multiple views, the one set as default will always be displayed in the Account Monitor.
- To see other views, select View then **Accounting Group**. All views you have set up will be displayed by the title you entered for them, select the desired view.

- From the Account Monitor, you can adjust the view to show a single period by using the **Period** drop down.
To see the change in the account scroll to the right to locate the Change and Change (%) columns. What this represents depends on what Comparison Option you selected when setting up the view.

All text in blue is available to drill into details.

Additional columns can be added to add details. Click View then Columns. Then check the box next to the desired additional column.

Recommended Usage:
In order for both of the recommended uses included below to be available within any view set up, it is recommended you always set the Comparison Option to Budget YTD.
Actual Expenditures
These steps allow you to review and drill into detail of your actual expenditures.

- From the Accounting Monitor, click on the dollar amount under **Actual**.

- This brings you to the Inquire on **Detail Balances** page. There are a number of options from this page. What is displayed can be adjusted and refined by using the filters at the top of the page.

- After applying filter(s), click **Search**.

- It is recommended to adjust **From Accounting Period** and **To Accounting Period** to see your **Beginning Balance**, **Activity** and **Ending Balance** by account for a single period. In this example, May-18 is entered in both fields to see just May 2018 information.
- All values in **blue** can be clicked on to display additional detail related to that value.
- In this example, we are going to click on $4,610.95 to view the detail in the period of May 2018 for account 62001.

This opens additional details about what makes up this dollar amount. You can continue to drill into detail by clicking on the blue text on this page as well.
- Click **Done** to return to the **Inquire on Detail Balances** page.

### Budget to Actuals

These steps allow you to see your actuals side by side with the amount that was budgeted for that account.
- From the Accounting Monitor, click **All Account Values**.
  - If you would like to review just one period, use the **Period** drop down to the desired period prior to selecting All Account Values.
- The **Inquire and Analyze Balances** page will appear. Similar to other pages, all values in blue can be drilled into for more detail.
- There is a column which displays the Actual transactions which have occurred for that account as well as one that shows the UW Budget. In the Change column is the actual minus the budget.
  - Note: If your actual revenue is greater than your budgeted amount, the difference is not available as part of your spending authority.

**Note:** the total values listed at the bottom of this page do not represent an actual total as it includes balance sheet accounts (asset, liability, and fund balance accounts).

- Additional columns can be added to add details. Click **View** then **Columns**. Then check the box next to the desired additional column.