



FINANCIAL COMPASS

PAGE NAVIGATION

The screenshot shows the Financial Compass interface with the following elements highlighted by numbered callouts:

- 1**: Compass Home logo
- 2**: Previous Page button
- 3**: Navigation Hierarchy breadcrumb: 02. Unrestricted Planning / 02.01 - Non-Labor Input - Unrestricted
- 4**: Context Selector dropdown: L29 - Office of Digital Learning
- 5**: Quick Links panel containing: CP Home Page, Unrestricted Summary by Account, Unrestricted Net Operations by Budget En...
- 6**: Filter Tools panel with options for Refresh, Filter, Sort, and View.
- 7**: Insight Panel containing: PLANNING CYCLE, Forecast, APPLY FILTERS (Fiscal Year, Show All Time Periods, Show All Accounts), NOTES, NET OPERATIONS SUMMARY, SELECT SPREAD METHOD (Account: 56008 - Guarantees Received-C..., Spread Method dropdown), and APPLY SPREAD METHOD (Spread Plan Inputs).
- 8**: Expand/Minimize Panel icon
- 9**: Expand/Minimize Detail Summary icon

The main data table shows columns for FY23 and months from Jul 22 to Apr 23. The left sidebar lists various account codes and descriptions, such as 51100 - U Tuition, 51206 - U Technology, 51207 - U Health Fee, etc.

1 COMPASS HOME

2 PREVIOUS PAGE

3 NAVIGATION HIERARCHY

4 CONTEXT SELECTOR

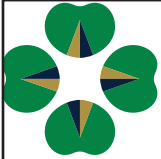
5 QUICK LINKS

6 FILTER TOOLS

7 INSIGHT PANEL

8 EXPAND/MINIZE PANEL

9 EXPAND/MINIZE DETAIL SUMMARY



FINANCIAL COMPASS

TERMINOLOGY

NAVIGATION PAGE

Landing site for Compass that highlights announcements, key dates, and quick links to areas of interest.

HOME PAGES

A summary page that provides resources related to the planning area.

INPUT PAGES

Worksheet in which users edit plan information.

INSIGHT PANEL

A column of additional action cards with information on a selected position/ budget entity.

CONTEXT SELECTOR

Specific position/budget entity located in either the:

- “Key Column” (the first, bolded column in an input grid)
- Bulleted FOAP in the upper right dropdown.

QUICK LINKS

Links to related pages in Compass or to an outside site (i.e., GLez, Tableau, and the Budget website).

PAUSE BUTTON (WFP ROSTER)

Pauses the nightly refresh of position updates from Banner when needed.

FREEZE BUTTON (CP)

Pauses updates from the workforce planning and transfer pages into your continuous plan. Used to prevent changes made on the other pages from feeding into your continuous plan and influencing the balancing process.

LOCK BUTTON (CP)

Locks the unrestricted and restricted non-labor input pages for the Adopted or Adjusted Budget. Used when you are finished with your budget process.

DATA SYNC BUTTON (CP/TRANSFER/REPORTS)

Pulls all current data from the various input pages into the transfer, reports, and continuous plan. Action is required to view current planned data.

PAGE INDICATORS

CONDITIONAL FORMATTING

- ① **GREY CELL**
Uneditable cells
- ② **WHITE CELL**
Editable cells
- ③ **PURPLE FONT**
Cell is filled but editable
- ④ **DARK GREY COLUMN**
Fiscal Years totals
- ⑤ **RED DIAMOND**
Indicates another user is entering data in the same cell
- ⑥ **RED**
Required information incomplete
- ⑦ **YELLOW**
 - Staff Merit- when outside the allowed range.
- ⑧ **PEACH**
 - Actualized periods
- GREEN SUBMIT BUTTON**
- ⑨ **GREEN SUBMIT BUTTON**
Required information complete and ready to submit

Apr 23	May 23	Jun 23	FY24	Jul 23	Aug 23	Sep 23
700	800			900	900	
				9.00 Hrs		
				80.00		
			648,000...			