Financial Compass

How To...

How to Copy a Position

On input screens within Workforce Plan

- Go to the Faculty or Staff Roster
- Scroll to the Copy Column and **check the box** of the desired position to copy
- Select the **Copy Position** button in Insight Panel under Position Actions
- New positions are titled "Plan-APXXXX" and located at the bottom of the Roster within that Org
- Add to the **Key Column description** by creating a description in the Short Description Column

How to Delete a Position

(Only for positions created in the Financial Compass)

In Position Planning within Workforce Plan

- Go to the Faculty or Staff Roster
- Select a Plan-APXXXX position in the Key Column to Delete
- Scroll to the Delete Column and **check the box**
- Select the **Delete Position** button in the Insight Panel under Position Actions

How to create a NEW Pooled Position

In Pooled Labor Planning within Workforce Plan

- Select the context selector budget entity for the new pooled position
- Click the **Add Pooled Labor** button
- Add **Org, Description, Employee Class, and Play** By (either dollar or units i.e. number of hours per month) in dialogue box
- Assign **Budget Entity**- Enter a Fund and Program (Org is prepopulated by context selector)
- **Remove Fund and Program by x-ing out the last enter item. If Org is incorrect, you must start again by selecting the correct context select
- Enter **Pooled Labor Cost**- Enter a value in editable cells (white with purple font).
- A total cost is calculated including fringe when all three lines (FTE, Hrs/Month/FTE, Avg. Hourly Rate) are filled in the anticipated labor months.
- Click **Submit** button

How to add Other Employee Costs

In Position Planning within Workforce Plan

- Select Other Employee Cost
- Click **Add Employee Cost** button
- Enter **Position, Description, and Cost** Type in dialogue box
- Enter their **Employee Cost**- Add anticipated amount to project month(s)
- Assign **Budget Entity**- Add FOAP
- Add note is desired
- Click **Submit** button

How to add Overtime

In Overtime Planning within Workforce Plan

- Click Add **Overtime Plan** button
- Enter **Org, Description, and Plan** in dialogue box
- Assign **Budget Entity**- Add FOAP
- Enter **Overtime Costs**- Add necessary values in desired month(s)
- Click **Submit** button

How to create a Transfer

In Transfers within Transfers Homepage

- Click the **Add Transfer** button
- Confirm F-O combination
- Add **Short Description**
- Scroll down to **Set Transfer Details**
- Select **Transfer Type** *(Growth Rates apply)*
- *Optional* check box to select One-sided and Direct Transfer In *(these options are used for balancing purposes and will need to be deleted once the actual transfer is posted)*
- Under **Select Program**, choose a program related to the populated Fund-Org combination
- Under **Set Transfer Schedule,** choose either:

  One-Time, choose the year in which the transfer will take place or

  Recurring, choose the Start and End Year (leave End Year blank if perpetual)
- *Optional* adding dated, detailed **Notes** on the purpose of the transfer, people involved and/or relevant contacts is a recommended best practice
- Scroll down to **EnterAmounts**, enter the dollar amount(s) in the month(s) where the transfer will take place.
- Click **Add Destination** button
- *Option to change transfer description for other parties*
- Select **FOP** and **Enter corresponding amount** (total dollar amount must equal total transfer amount)
- Click **Submit** button

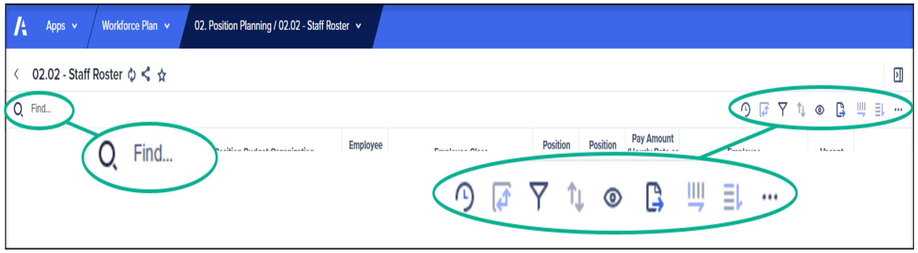
Things to know

- No Save or Undo *(real-time changes)*
- Smart navigation *(Context Selector/ Filters remain)*
- Plannable Budget Entities are indicated by a bullet in dropdown
- All input pages include 2 decimals, all reports rounded
- Data Refreshed Daily/Ongoing
- Users can widen columns
- Hover to view scroll bars
- Use Duplicate Tabs

Additional training materials and short videos can be found on the Budget Office website
budget.nd.edu/financial-compass/

Financial Compass

Filter Tools



Find

Locates a searched value in the column and row headers

- **Type** in the desired information
- In the dropdown, click on the found value to **engage the Context Selector**

Cell History

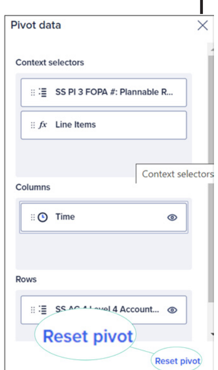
Provides a view of changes made to the cell selected for a specified time period.

- Select cell to query
- Click the **Cell History** tool
- **Choose** a time period from the dropdown option
- **Review** information

Pivot

Restructures the grid summary view of columns and rows. (This tool is NOT available on all pages)

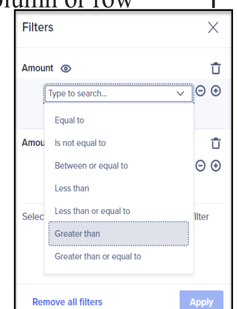
- In the tool's insights panel, **Arrange** provided context selectors in either the column or the row
- Pivoting applied
- **Click** the **Reset** pivot button to reset the grid data
- **X out** to close the tools insight panel



Filter

Filters a single column or row based on specified containing criteria

- **Select** desired column or row
- **Click** the Filter tool
- In the tool's insights panel, choose from the condition dropdown
- **Enter** the required criteria to filter on
- Click **Apply** button
- Additional filters can be added/ removed to the selected column or row by using these
- Filter applied
- Click **Remove** all filters to reset grid data



Sort

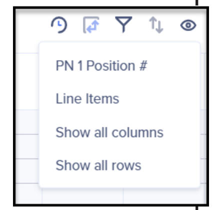
Rearranges the content of a column in ascending or descending order

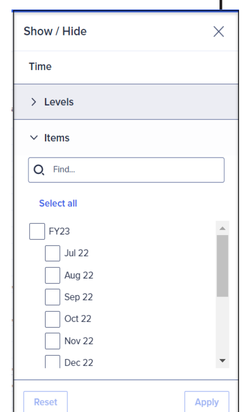
- **Select** a column header
- Click the **Sort Tool** and choose either ascending or descending
- Sort applied
- To **Remove**, select Unsort

Show/Hide

Allows you to Show or Hide the columns in the summary grid

- From the dropdown, **Select** either the rows (e.g.PN 1 Position #) or the columns (Line Items)
- In the tool's insights panel:
- **Choose** Level or Item
- Make desired view by selecting the checkbox next to the row/ column name to show in the summary grid (the filter default is nothing selected)
- Click **Apply** button
- Show/Hide applied





Ideal use for Show/Hide

- **Select** by column (Line Items)
- Under Items, click **Select All** to show all columns
- **Unselect** the checkbox next to the column name to Not appear in the summary grid
- **Reset** selection by clicking the reset button (this does not remove the filter, but returns the filter to default)
- **Remove** Show/Hide filter by selecting Show all columns and Show all rows from the dropdown list

Export

Creates a file of summary grid view (hidden items will not export)

- **Select** type of format
- Click **Export** button

Copy Across

Copies data selected across to all cells to the right

- **Click** the desired cell with value to copy
- Click **Copy Across** icon

Copy Down

Copies data selected down to all cells to the bottom

- **Click** the desired cell with value to copy
- Click **Copy Down** icon

Format Grid

Change the size of the summary grid

- **Choose** either Row Height or Font Size
- **Select** desired size (change is temporary and defaults once a page is left)

Insights Panel

Show/Hides the Insight Panel

- Click to **Minimize** or **Expand** insight panel (change is temporary and defaults once a page is left)

Detail Summaries

Show/Hides additional detail summaries

- Click to **Expand** or **Minimize** additional information in the detail summaries

Troubleshooting

Check if:

- Filters are applied
- Correct Fiscal Year
- Referencing the correct Context Selector (Org/Position#)
- Refreshed/Synced data