

SAUSD BI Dashboard Walkthrough - "Financials" Tab

The SAUSD BI Dashboard is designed to support an administrator's monitoring and managing of budgets. Previously, an administrator or designee would download a "Funds Available" report from Oracle Forms to acquire this information. The SAUSD BI Dashboard now provides much more information, is easier to access, and supports the LCAP and other functions an administrator may want to focus on when managing budgets.

The SAUSD BI Dashboard can be reached through the following URL: <http://sausdbi.sausd.us:9502/analytcs>



Alternatively, it can be reached through the SAUSD Staff Portal at www.sausd.us under "Staff Resources"

Scroll to the bottom of this page and find the icon for "SAUSD Business Intelligence".



Sign In

Enter your user id and password.

User ID

032679

Password

.....

Sign In

Accessibility Mode

English

Log in using you full employee ID (including the "0" at the beginning) and oracle password.

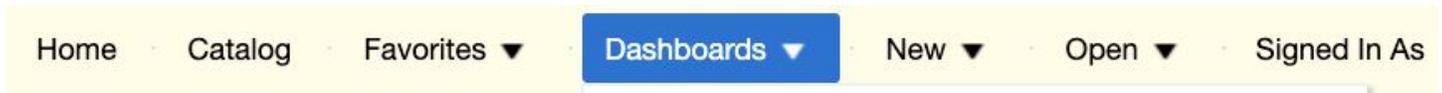
If you forgot your employee ID or password, click here.

Forgot your password/username:

[Click Here to reset/retrieve](#)

(hint: username/password is the same as your original Oracle login)

Once you are logged in, immediately go to the “Dashboard” tab.



And select “Administrative Dashboard”



****NOTE:** you may also see the option “District Manager” under the “Dashboards” drop down. If you do, select that one instead. This access is limited to higher level management and their delegates.

Your school site should appear under “site”. You can adjust your parameters in any of the boxes, however the default should reveal your site and all funds associated with your site for the current year to date.



You might want to limit your object range to show non-payroll accounts only.



Remember to click “Apply” if you make any changes.

This is your Funds Available Report. There are 3 main sections:

1. “How am I spending by Object” The amount of green indicates how much you have left by object range.
2. “Object Range” Same as #1, but in table form
3. “Funds Available” Line by line listing of every budget and what is available

Select parameter values then click "Apply". This affects all Dashboard values and reports ending with (*)

Fiscal Year: 2020 | Period (Year To Date): Aug-20 | Fund Resource: (All Column Values) | Site: Adams Elementary | Use Default: 1000 | Enter Object Range: 8999 | Apply | Reset

How I am spending by Object *

Object Range	Funds Available	Encumbrance	Actual
1000-1999 Certificated Salaries	2,513,171.85		21,291.67
2000-2999 Classified Salaries	707,355.67		8,706.36
3000-3999 Employee Benefits	1,360,597.68		53,192.76
4000-4999 Books and Supplies	82,338.63	5,214.69	1,326.54
5000-5999 Services and Other Operating Expenditures	36,273.43	14,954.57	1,500.00
6000-6999 Capital Outlay	0.00	6,000.00	
Grand Total	4,699,737.26	26,169.26	86,017.33

Refresh - Print - Export

Funds Available

LCAP Goal: All Values

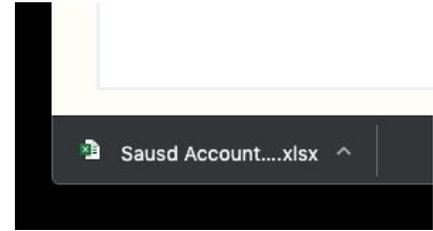
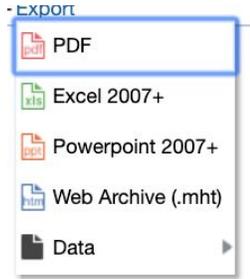
Goal	Action	Services	Account	Fund Resource Description	Goal Description	1-Budget	2-Encumbrance	3-Actual	Funds Available	% Available
1	01	001	013010-0-1291-1000-1104-050	013010 IASA:Title I Basic Grants Low-Income and Neglected, Part A	Testing and Acco	4,270.00			4,270.00	100.00
1	01	001	013010-0-1291-1000-3101-050	013010 IASA:Title I Basic Grants Low-Income and Neglected, Part A	Testing and Acco	730.17			730.17	100.00
1	01	001	013010-0-1291-1000-3313-050	013010 IASA:Title I Basic Grants Low-Income and Neglected, Part A	Testing and Acco	61.91			61.91	100.00
1	01	001	013010-0-1291-1000-3501-050	013010 IASA:Title I Basic Grants Low-Income and Neglected, Part A	Testing and Acco	2.13			2.13	100.00
1	01	001	013010-0-1291-1000-3601-050	013010 IASA:Title I Basic Grants Low-Income and Neglected, Part A	Testing and Acco	58.07			58.07	100.00
1	01	002	010030-0-1111-1000-5711-050	010030 Unrestricted Discretionary Accounts	General Education	4,000.00	2,102.06		1,897.94	47.45
1	01	002	013010-0-1110-1000-5711-050	013010 IASA:Title I Basic Grants Low-Income and Neglected, Part A	Regular Education	567.00			567.00	100.00

Reports

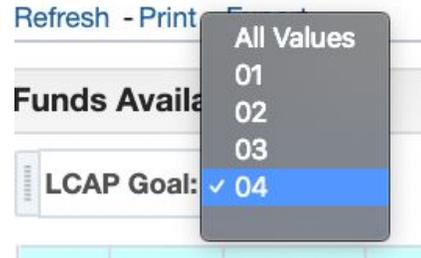
- Funds Available by FundResource-Major Object *
- How much we spent with Vendors *
- LCAP Accounts Listing

If you scroll down to the bottom, you can export your funds available to several different types of files.

Goal	Action	Services	Account
4	04	001	010030-0-1111
4	04	001	010030-0-1111
4	04	001	013010-0-1161
4	04	002	013010-0-1110
4	06	006	010030-0-1313
4	06	006	013010-0-1313
4	06	006	016512-0-5750
4	06	007	010030-0-1313
4	06	007	010030-0-1313
4	06	007	010030-0-1313
4	06	007	010030-0-1313
4	06	008	010030-0-1217
			010031-0-1123
Grand Total			



You can narrow down which LCAP Goal you want to focus on.



If there are actuals, you can drill down to see what those expenses were spent on. **Click on the account number**

2	11	009	010030-0-1280-1000-5210-050	010030 Unrestricted Discretionary Accounts	AVID	550.00		550.00	100.00
3	03	004	259157-0-0025-8500-6235-050	259157 Fund 25 City Santa Ana Redevelopment	Facilities New Con	0.00		0.00	
3	03	007	010030-0-0000-2700-4330-050	010030 Unrestricted Discretionary Accounts	Unrestricted	285.00		285.00	100.00
3	03	007	259157-0-0026-8500-6230-050	259157 Fund 25 City Santa Ana Redevelopment	Facilities Moderniz	6,000.00	6,000.00	0.00	0.00
3	05	004	013010-0-1313-3141-5810-050	013010 IASA:Title I Basic Grants Low-Income and Neglected, Part A	School Climate/Be	11,300.00	1,968.00	9,332.00	82.58
3	07	010	135310-0-0000-3700-4720-050	135310 Child Nutrition: School Programs	Unrestricted			244.16	-244.16
3	07	010	010030-0-0000-2700-4400-050	010030 Unrestricted Discretionary Accounts	Unrestricted	1,850.00		1,850.00	100.00
3	08	001	013010-0-1311-1000-5810-050	013010 IASA:Title I Basic Grants Low-Income and Neglected, Part A	Structured Recess	9,200.00		9,200.00	100.00
4	02	004	010730-0-1110-1000-4300-050	010730 SC-Early Learning (PreK-gr 6)	Regular Education	40,000.00	0.00	40,000.00	100.00
4	02	008	016010-0-1110-1000-4300-050	016010 After School Education and Safety (ASES)	Regular Education	3,502.48	624.16	2,878.32	82.18
4	03	002	013010-0-1110-1000-5155-050	013010 IASA:Title I Basic Grants Low-Income and Neglected, Part A	Regular Education	2,000.00		2,000.00	100.00



Sausd - Where the money is spent
Time run: 8/29/2019 4:01:18 PM

Payments

Check#	Payment Date	Period	Vendor	Amount	Account	Process
84269581	06-Aug-19	Aug-20	OFFICE DEPOT	363.41	010030-0-1111-1000-4300-050	PAYMENT CREATED
84269995	21-Aug-19	Aug-20	OFFICE DEPOT	73.68	010030-0-1111-1000-4300-050	PAYMENT CREATED
Grand Total				437.09		

Refresh - Print - Export

**NOTE: Any transactions that bypass the Oracle Process will not appear in this report. For example, print shop expenses, inventory, moving actual charges from one account to another, etc.

