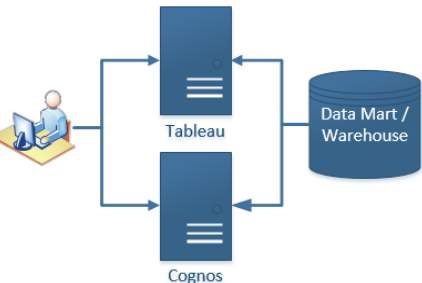


Blink > Financial Analytics

Access: Go to AccessLinkTNG > Facility > FINANCIAL: WWW - FinancialLink
 If you have access to FinLink then you have access to Financial Analytics



Key Information

- Data is refreshed nightly
- Field definitions are available in Information Governance Catalog (<https://igc.ucsd.edu>)

Tips

- Start small, add more
- Save often
- Right click / Left click anywhere

Filter Early & Often

- Less is more
- If you cannot explain a chart, do not use that chart
- Ask others for help or ideas
- Share

Efficiency

- If you find yourself creating something again and again in Excel, move it to a BI tool
- **90%** of what can be done in Excel can also be done in a BI tool, plus more
- BI tools can automate repetitive analysis

Financial Analytics

Financial Analytics – Operating Ledger

Dimensions

Accounting Period

Fields used to organize data by calendar and fiscal accounting periods

Filter Here First
 More Dates = More Data
 = Longer Running Report

Account

Account related fields and hierarchy
 Account Status

Fund

Fund related fields and hierarchy
 Fund Date Intervals

Index

Index related fields

Organization

Organization related fields and hierarchy

Program

Program related fields and hierarchy

Location

Location related fields

Measures: # Counts and \$ Amounts

Operating Ledger Measures

Budget Amount	The summary of all adjustments that have been made to the adopted budget for the specified period.
Encumbrance Amount	The summary amount that is being reserved (an encumbrance) against the ledger.
Financial Amount	Transactions in the Operating Ledger representing either realized revenue, costs incurred for goods and services or fund transfers.
Balance with Encumbrance Amount	Budget Amount – Financial Amount – Encumbrance Amount
Balance without Encumbrance Amount	Budget Amount – Financial Amount
YTD Budget Amount	??? YTD or Beginning of time
YTD Encumbrance Amount	??? YTD or Beginning of time
YTD Financial Amount	??? YTD or Beginning of time
YTD Balance with Encumbrance Amount	YTD Budget Amount – YTD Financial Amount – YTD Encumbrance Amount
YTD Balance without Encumbrance Amount	YTD Budget Amount – YTD Financial Amount
Prior Year Budget Amount	??? YTD or Beginning of time
Prior Year Financial Amount	??? YTD or Beginning of time
Prior Year Balance Amount	??? YTD or Beginning of time

More Filters = Less Data = Faster Running Report

Community of Practice @ Blink > Financial Analytics

Training and More Available on Blink > Business Intelligence