



Budget Status Cube Tips and Tricks

Formatting and creating views in the Budget Status Cube

This document provides some useful tips for formatting and using the Landscape view of the Budget Status Cube.

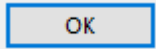
Getting Started

- The Budget Status Cube is accessed under [Operational Reports](#) on the Office of Institutional Research page.
 - All sensitive data accessed from off campus should be done through the Cisco VPN client.
 - This [tutorial](#) provides instruction on how to download and access the cube.
- Open the Budget Status Cube and select the **Landscape** sheet.

Showing Data in Individual Columns

- Right click within the pivot table and select **PivotTable Options...** from the context menu.

- Under the **Display** tab select the **Classic PivotTable layout (enables dragging of fields in the grid)** and click



PivotTable Options

PivotTable Name: PivotTable1

Layout & Format Totals & Filters **Display** Printing Data

Display

Show expand/collapse buttons

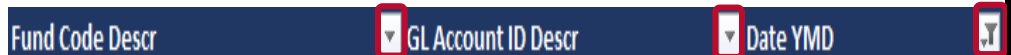
Show contextual tooltips

Show properties in tooltips

Display field captions and filter drop downs

Classic PivotTable layout (enables dragging of fields in the grid)

- The layout for any added fields is now “*Show item labels in tabular form*” rather than “*Show item labels in outline form*”, and it will add the filter drop downs for each field. This formatting change allows for use of the filters to sort data and reduces the number of rows visible.

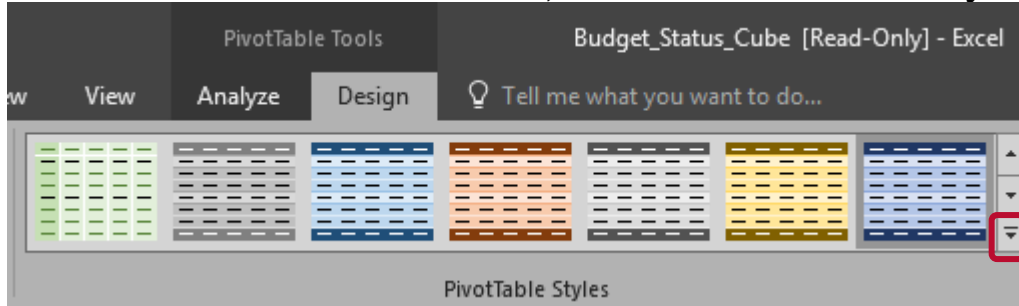




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Highlighting the Total Rows

- To format the Total rows to display in a different color, navigate to the **Design** tab under the PivotTable section of the menu ribbon, and click the **PivotTable Styles** drop-down arrow.



- In the PivotTable Styles menu, the first row under the Medium section select the second blue option, **Pivot Style Medium 6**.

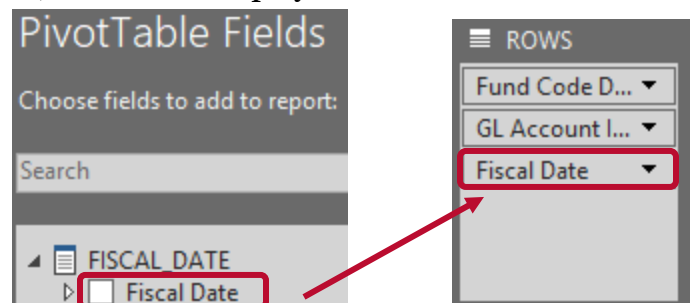


- Total rows now display in a different color.

15000000 - Libraries	\$27,557,446.62	\$13,486,099.36	\$4,248,335.03	\$9,823,012.23
15100000 - Libraries	\$18,546,902.35	\$11,545,901.53	\$2,666,232.08	\$4,334,768.74
1510000A - Libraries Operating	\$14,950,408.96	\$9,379,525.13	\$2,211,090.99	\$3,359,792.84
15100001 - Libraries Budget	\$14,813,656.68	\$9,377,227.71	\$2,186,905.30	\$3,249,523.67
15199994 - Wormsloe Historic Site	\$10,000.00	\$0.00	\$0.00	\$10,000.00
15199995 - SCL Special Event Sales	\$7,183.28	\$0.00	\$0.00	\$7,183.28
15199996 - Stone Mtn Sale Real Property	\$119,569.00	\$2,297.42	\$24,185.69	\$93,085.89

Redisplaying Only Date YMD

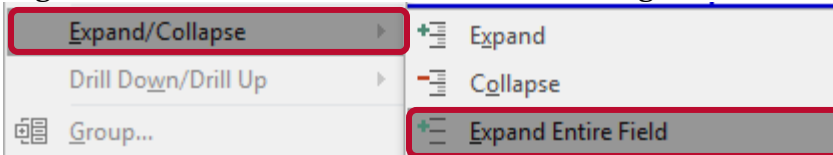
- If the Date YMD column is accidentally removed, it can be redisplayed without Fiscal Year and Fiscal Acctg Pd values.
- Begin by dragging the Fiscal Date option from the **PivotTable fields** menu to the **Rows** menu.





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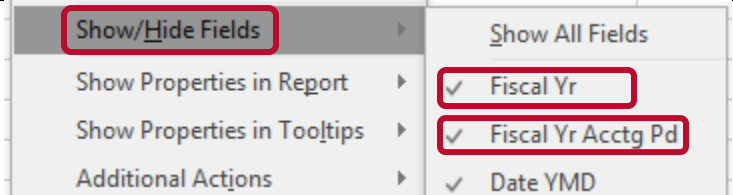
- Right click in the **Fiscal Yr** column and navigate:




- Repeat this process for the **Fiscal Yr Acctg Pd** column.

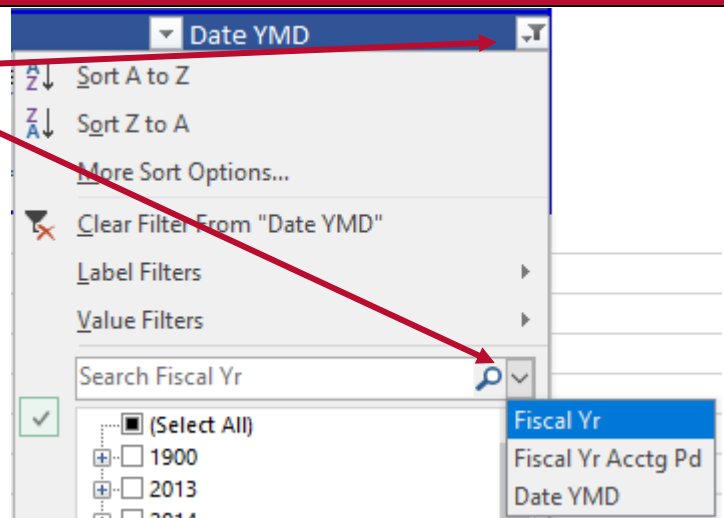
- Right click in the **Date YMD** column, navigate **Show/Hide Fields** > deselect **Fiscal Yr**.

- Repeat for **Fiscal Yr Acctg Pd**.



Filtering within Date YMD

- To filter by Fiscal Yr or Fiscal Acctg Pd
 - Open the drop-down filter .
 - Select the appropriate **Search** criteria.
 - Click the button.



Additional Information

- If you have questions, please contact the OneSource Service Desk at onesource@uga.edu or 706-542-0202 (option 2).