

# HKBU Financial Dashboard User Guide



香港浸會大學

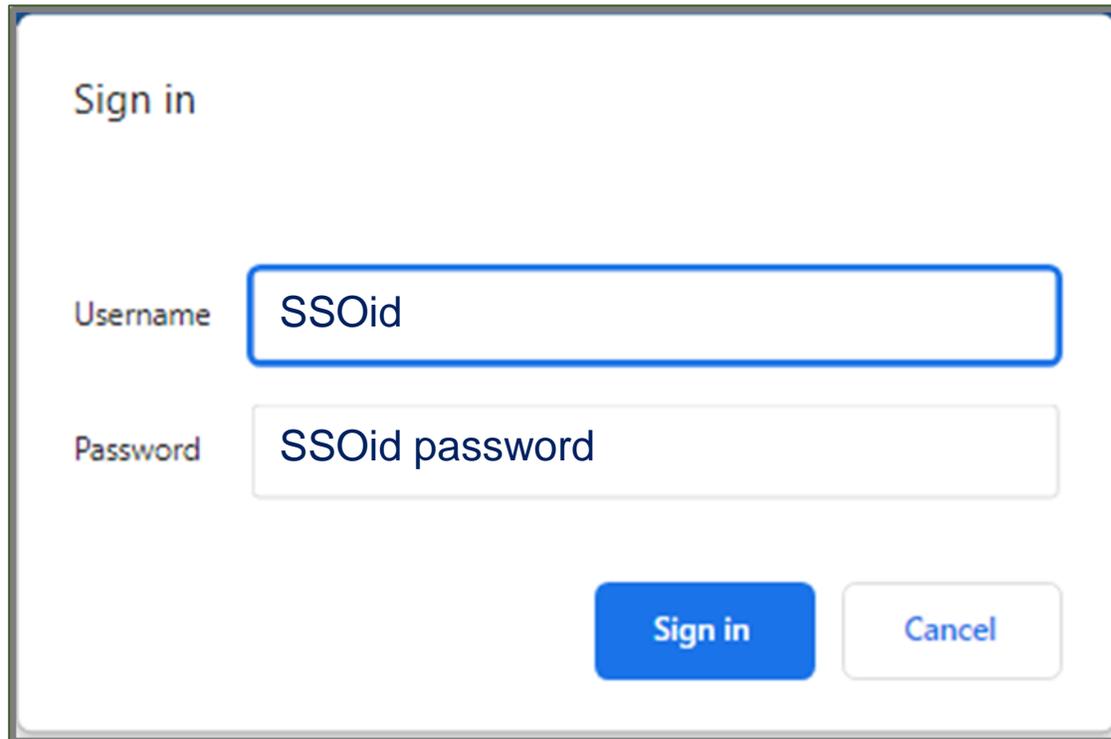
HONG KONG BAPTIST UNIVERSITY

# Login and View Dashboards

# Login on Qlik Sense

Authorised users should have a Qlik Sense login link from your office.

Please login using your HKBU SSOid and password.



The image shows a 'Sign in' dialog box with the following elements:

- Sign in**: The title of the dialog box.
- Username**: A label next to a text input field containing the text 'SSOid'.
- Password**: A label next to a text input field containing the text 'SSOid password'.
- Sign in**: A blue button with white text.
- Cancel**: A white button with a blue border and blue text.

# Hub Page

Qlik Sense® Enterprise

Financial Dashboard – Income and Expenditure Analysis 2

**Income and Expenditure Analysis**  
Data reloaded: Nov 8, 2022, 12:00 AM  
Published: Oct 7, 2022, 4:46 PM  
Created: Apr 26, 2022, 10:13 AM  
File size: 31 MB  
Location: Financial Dashboard – Income and Expenditure Analysis  
Owner: QSE Admin (INSIGHTS\qseadmin)

INCOME AND EXPENDITURE HIGH-LEVEL ANALYSIS

Personal  
Work  
Published  
Streams  
Everyone  
Financial Dashboard – Consolidated Income and Expenditure  
Financial Dashboard – Donation Analysis  
Financial Dashboard – Grants Acquisition  
Financial Dashboard – Income and Expenditure Analysis  
Financial Dashboard – Staff Cost and Headcount Analysis  
Financial Dashboard – Tuition Fees Analysis

Select the Dashboard (App)

Select a Stream

# Dashboard (App) Overview Page

*Income and Expenditure Dashboard is used to demonstrate the navigations and visualizations*

After selecting the Dashboard on the Hub page, all the sheets of this dashboard are displayed under “Public Sheets”

User can select sheet “User Guide and Content Page” for guidance notes and select a Sheet on the lower pane of Content Page; or select one directly on this page

The screenshot displays the 'Income and Expenditure Analysis' dashboard. At the top, there are navigation options: 'Analyze Sheet' and 'Narrate Storytelling'. Below this, a header section shows the dashboard title and metadata: 'Data last loaded: Apr 19, 2022, 11:05 AM', 'Published: Apr 15, 2022, 9:31 AM', and 'Published to: Financial Dashboard (FO - IE)'. The main area is titled 'Public sheets (20)' and contains a grid of 20 sheet thumbnails. The first thumbnail, 'User Guide and Content Page', is highlighted with a red border and a callout box. A box labeled 'Sheets of the selected Dashboard' has an arrow pointing to the grid. The grid includes sheets such as 'Free Balance Overview', 'Recurrent Fund - Departmental Budget', 'Recurrent Fund - U-wide Budget Items', 'Self-financed Academic Programmes', 'Clinics', 'Hostels', 'Chaplain's Office', 'Research or Related Projects', 'Capital Projects and AA&I', 'Other Activities', and 'School of Continuing Education(SCE)'. The bottom right corner of the grid shows '4.1 School of Continuing ...'.

# User Guide and Content Page

Income and Expenditure Analysis | Analyze Sheet | Narrate Storytelling | Duplicate | User Guide and Conte... | Selections

Staff Cost Com... Include | Temp Budget Include | Clinic Commitm... Exclude

## User Guide and Content Page



User Guide for Financial Dashboards

[User Guide](#)

[Glossary](#)

### Introduction

Qlik Sense is a data analytics platform that brings together data from spreadsheets and systems, and transforms them into informative and interactive dashboards. A series of Qlik Sense dashboards has been developed to visualise the complete financial status at the University from different funds. The dashboards, built using financial data from various units and offices, will enable evidence-based decision making, academic planning, and benchmarking by senior management, administrative offices, and academic units.

In the user guide, we will go over different Qlik Sense visualisations and functions, and explore how to use them to perform data analysis. A glossary has also been developed to explain the terms used in the dashboards.

For more in-depth guidelines and tips, please refer to the following Qlik Sense guidance notes and online tutorials:

- Guidance notes on dashboard(app) overview
- Guidance notes on interacting with visualisations
- Tutorials on exploring, selecting and searching data
- Tutorials on different types of visualisations(Part I)/(Part II)

Select a Sheet of the selected Dashboard

### Income and Expenditure Statements

#### Section 1 : Free Balance Overview

1.1 Summary of Free Balance

#### Section 2: Recurrent Funds

2.1 Recurrent Fund - Departmental Budget

2.2 Recurrent Fund - U-wide Budget Items

#### Section 3: Other Funds

3.1 Self-financed Academic Programmes

3.2 Clinics

3.3 Hostels

3.4 Chaplain's Office

3.5 Research Projects

3.6 Capital Projects and AA&I

3.7 Other Activities

#### Section 4: School of Continuing Education

4.1 School of Continuing Education

# Sheet

After selecting the Sheet on the Dashboard (App) page or Content Page, information of the selected Sheet is displayed

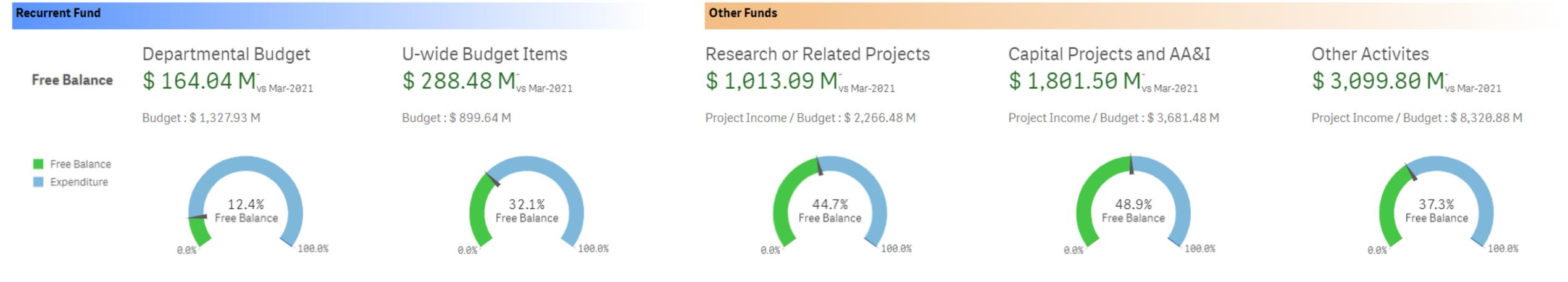
Income and Expenditure Analysis | Analyze Sheet | Narrate Storytelling | Duplicate | 1.1 Overview of Free B... | Selections

Staff Cost Com... Include | Temp Budget Include | Clinic Commitm... Exclude

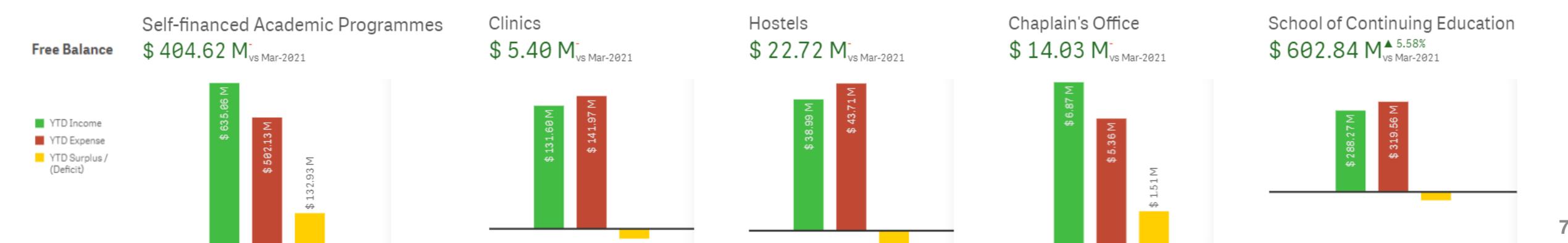
## 1.1 Overview of Free Balance as at 31-Mar-2022 HKBU

Financial Year / Period | Grouping for Faculties / Admin. Offices | Selection for Staff Cost Commitment | [Content Page](#)

Financial Year: | Month: | Faculties / Admin. Offices | Faculties / VP Offices | Departments / Units | Staff Cost Commitmen...



### Other Self-financed Activities (include year-to-date "YTD" performance)



# Shift between Pages

# Shift between Pages

The screenshot displays a Qlik Sense dashboard interface. At the top, there is a navigation bar with a menu icon, the text "Name of Current Page", and buttons for "Analyze Sheet" and "Narrate Storytelling". Below this, a tabbed interface shows "Staff Cost Com...", "Temp Budget", and "Clinic Commitm...". A green callout box highlights a menu icon in the top left corner. Below the callout, a navigation panel is shown with two options: "App overview" (with a home icon) and "Open hub" (with a network icon). Two callout boxes with arrows point to these options: "Back to 'Dashboard (App) Overview Page'" and "Back to 'Hub Page'". The main content area is divided into four sections: "Section 1: Free Balance Overview", "Section 2: Recurrent Funds", "Section 3: Other Funds", and "Section 4: School of Continuing Education". Each section contains a list of sub-items.

Staff Cost Com... Include

Temp Budget Include

Clinic Commitm... Exclude

User Guide and Conte...

Selection

HKBU

User Guide

Glossary

Introduction

Qlik Sense is a data visualization tool. A series of Qlik Sense dashboards has been developed to visualise the complete financial status at the University from different funds. The dashboards, built using financial data, are used by the University's management, administrative offices, and academic units.

In the user guide, you can find more information on how to use the dashboards. For more in-depth information, see the following links:

- Guidance notes
- Guidance notes
- Tutorials on exploring the dashboards
- Tutorials on different views

Income and Expenditure

App overview

Open hub

Back to "Dashboard (App) Overview Page"

Back to "Hub Page"

Section 1: Free Balance Overview

Section 2: Recurrent Funds

Section 3: Other Funds

Section 4: School of Continuing Education

1.1 Summary of Free Balance

2.1 Recurrent Fund - Departmental Budget

2.2 Recurrent Fund - U-wide Budget Items

3.1 Self-financed Academic Programmes

3.2 Clinics

3.3 Hostels

3.4 Chaplain's Office

3.5 Research Projects

3.6 Capital Projects and A&M

3.7 Other Activities

4.1 School of Continuing Education

# Shift between Pages

After selecting the Sheet on the Dashboard (App) page or Content Page, information of the selected Sheet is displayed

Income and Expenditure Analysis | Analyze Sheet | Narrate Storytelling | 1.1 Overview of Free B... | Duplicate | Selections

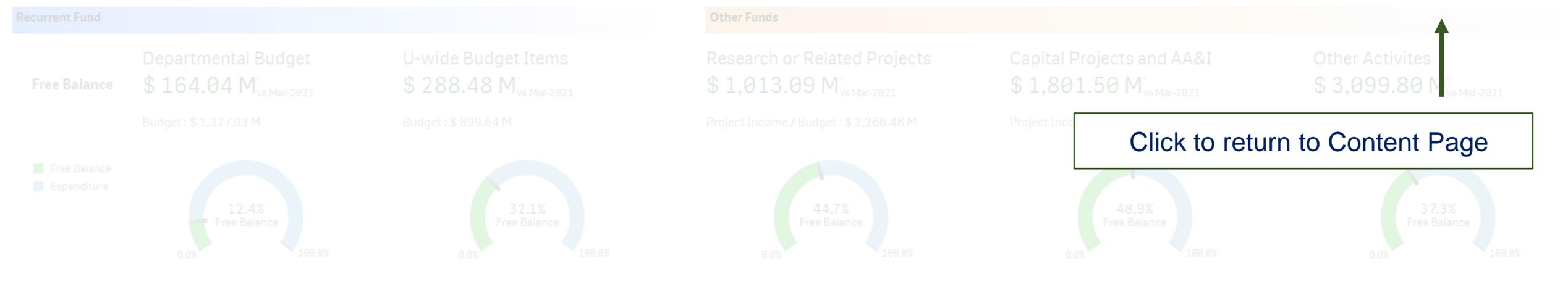
Staff Cost Com... Include | Temp Budget Include | Clinic Commitm... Exclude

## 1.1 Overview of Free Balance as at 31-Mar-2022 HKBU

Financial Year / Period | Grouping for Faculties / Admin. Offices | Selection for Staff Cost Commitment

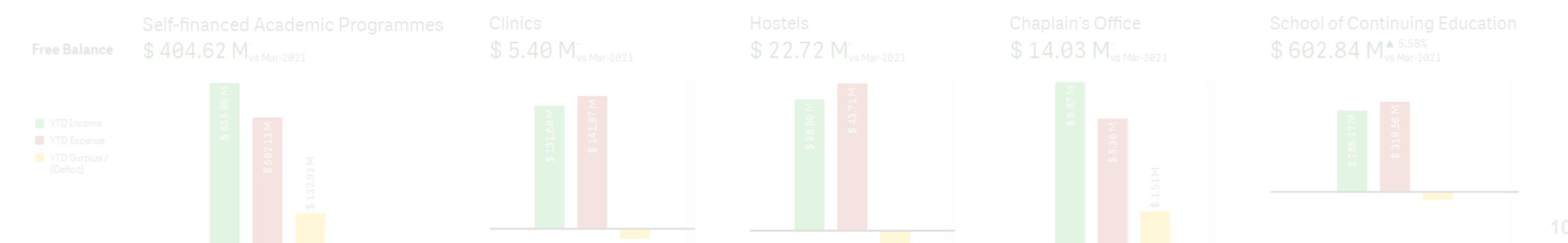
Financial Year: [ ] Month: [ ] | Faculties / Admin. Offices | Faculties / VP Offices | Departments / Units | Staff Cost Commitmen...

[Content Page](#)



Click to return to Content Page

### Other Self-financed Activities (include year-to-date "YTD" performance)



# Visualizations



# Visualizations for Individual Charts

The screenshot shows a financial analysis dashboard titled "Income and Expenditure Analysis". The main content area displays "1.1 Overview of Free Balance as at 31-Mar-2022". A bar chart titled "Self-financed Academic Programmes" shows YTD Income (\$485.86 M), YTD Expense (\$408.52 M), and YTD Surplus/Deficit (\$77.15 M). A function menu is overlaid on the chart, listing options: Full screen, Exploration menu, View data, Share, Take snapshot, Snapshot library, and Download as....

Click this icon to open the function menu

- Full screen
- Exploration menu
- View data
- Share
- Take snapshot
- Snapshot library
- Download as...

Free Balance \$ 275.15 M vs Mar-2021

Category	Value
YTD Income	\$485.86 M
YTD Expense	\$408.52 M
YTD Surplus/Deficit	\$77.15 M

Place your mouse cursor over the chart area to explore the function menu icon

# Visualizations for Individual Charts – Full Screen View

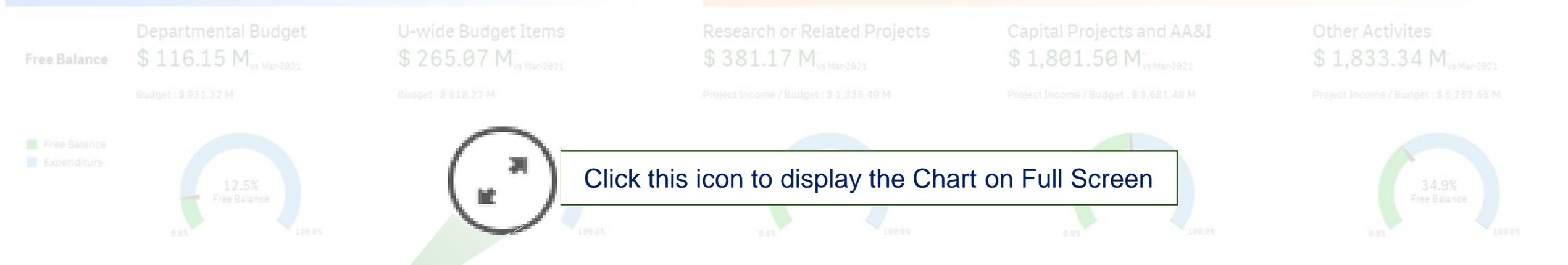
## 1.1 Overview of Free Balance as at 31-Mar-2022

Financial Year / Period: Financial Year, Month

Grouping for Faculties / Admin. Offices: Faculties / Admin. Offices, **Faculties / VP Offices**, Departments / Units

Selection for Staff Cost Commitment: Staff Cost Commitment : In...

Content Page

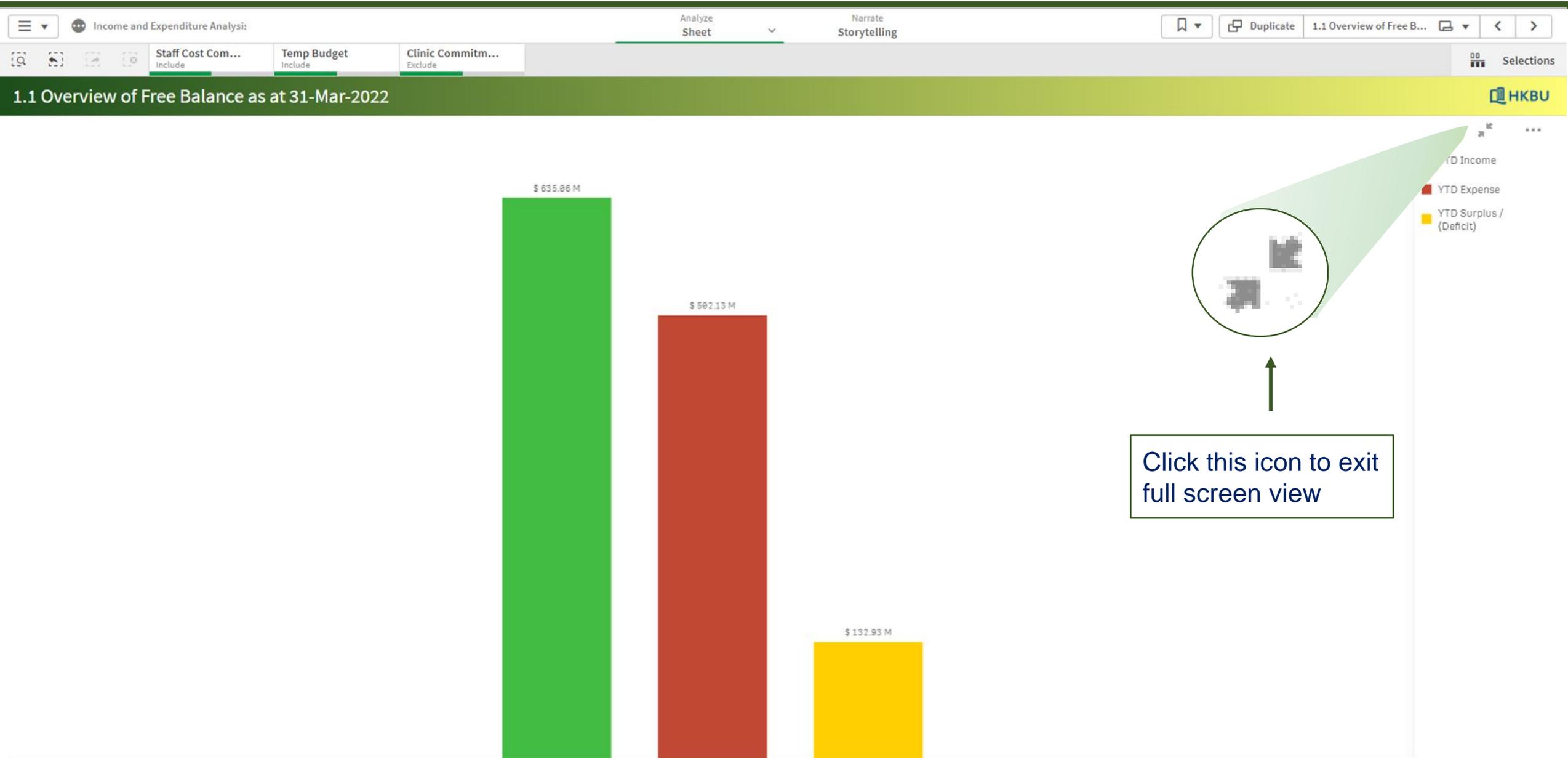


Click this icon to display the Chart on Full Screen

## Other Self-financed Activities (include year-to-date "YTD" performance)



# Visualizations for Individual Charts – Full Screen View



# Visualizations for Individual Charts – Exploration Menu

Income and Expenditure Analysis

Analyze Sheet | Narrate Storytelling

Staff Cost Com... | Temp Budget | Clinic Commitm... | Faculties / VP O... 12 of 16

1.1 Overview of Free Balance as at 31-Mar-2022

Financial Year / Period: Financial Year, Month

Grouping for Faculties / Admin. Offices: Faculties / Admin. Offices, Faculties / VP Offices, Departments / Units

Selection for Staff Cost Commitment: Staff Cost Commitment : In...

Recurrent Fund | Other Funds

Departmental Budget: Free Balance \$ 116.15 M vs Mar-2021, Budget: \$ 931.32 M, 12.5% Free Balance

U-wide Budget Items: Free Balance \$ 265.07 M vs Mar-2021, 10.5% Free Balance

Research or Related Projects: Free Balance \$ 381.17 M vs Mar-2021, 48.9% Free Balance

Capital Projects and AA&I: Free Balance \$ 1,801.50 M vs Mar-2021, Budget: \$ 3,681.48 M, 34.9% Free Balance

Other Activities: Free Balance \$ 1,833.34 M vs Mar-2021, Project Income / Budget: \$ 5,252.55 M

Other Self-financed Activities (include year-to-date "YTD" performance)

Self-financed Academic Programmes: Free Balance \$ 275.15 M vs Mar-2021

YTD Income: \$ 485.66 M, YTD Expense: \$ 488.52 M, YTD Surplus/ (Deficit): \$ 77.15 M

Clinic: Free Balance \$ 5.4 M vs Mar-2021

Office: Free Balance \$ 1.1 M vs Mar-2021

School of Continuing Education: Free Balance \$ 602.84 M vs Mar-2021, 5.58% vs Mar-2021

is generated no data this chart.

Full screen

Exploration menu

View data

Share

Take snapshot

Snapshot library

Download as...

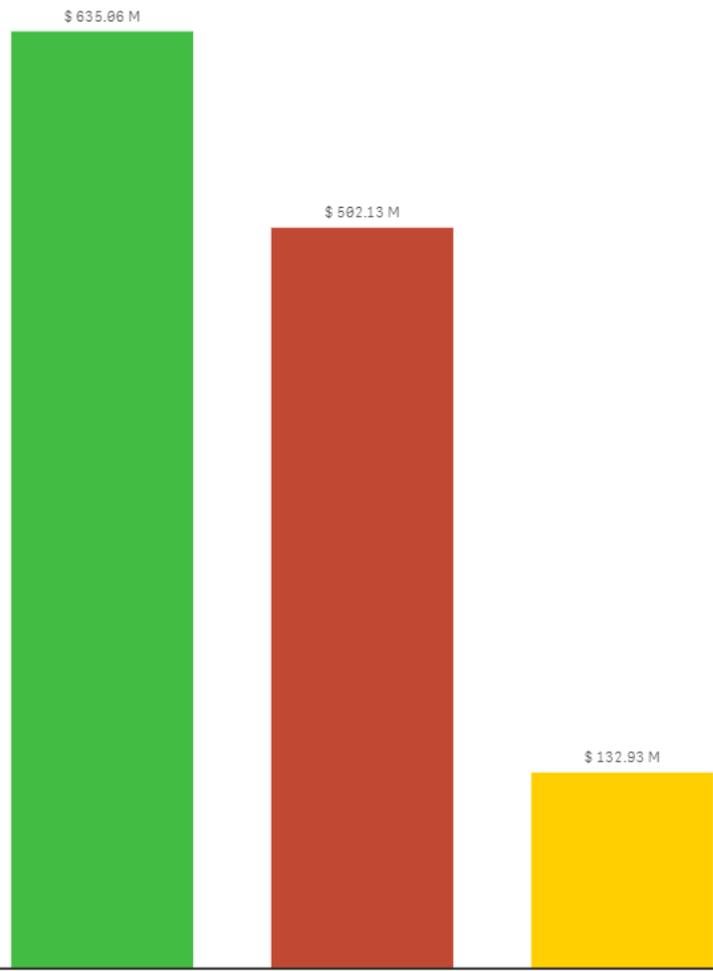
# Visualizations for Individual Charts – Exploration Menu

Income and Expenditure Analysis: Analyze Sheet Narrate Storytelling

Staff Cost Com... Include Temp Budget Include Clinic Commitm... Exclude

1.1 Overview of Free Balance as at 31-Mar-2022

HKBU



Click this icon to exit exploration view

- YTD Income
- YTD Expense
- YTD Surplus / (Deficit)

Data

Dimensions

Measures

- YTD Income
- YTD Expense
- YTD Surplus / (Deficit)

Sorting

Presentation

Colors and legend

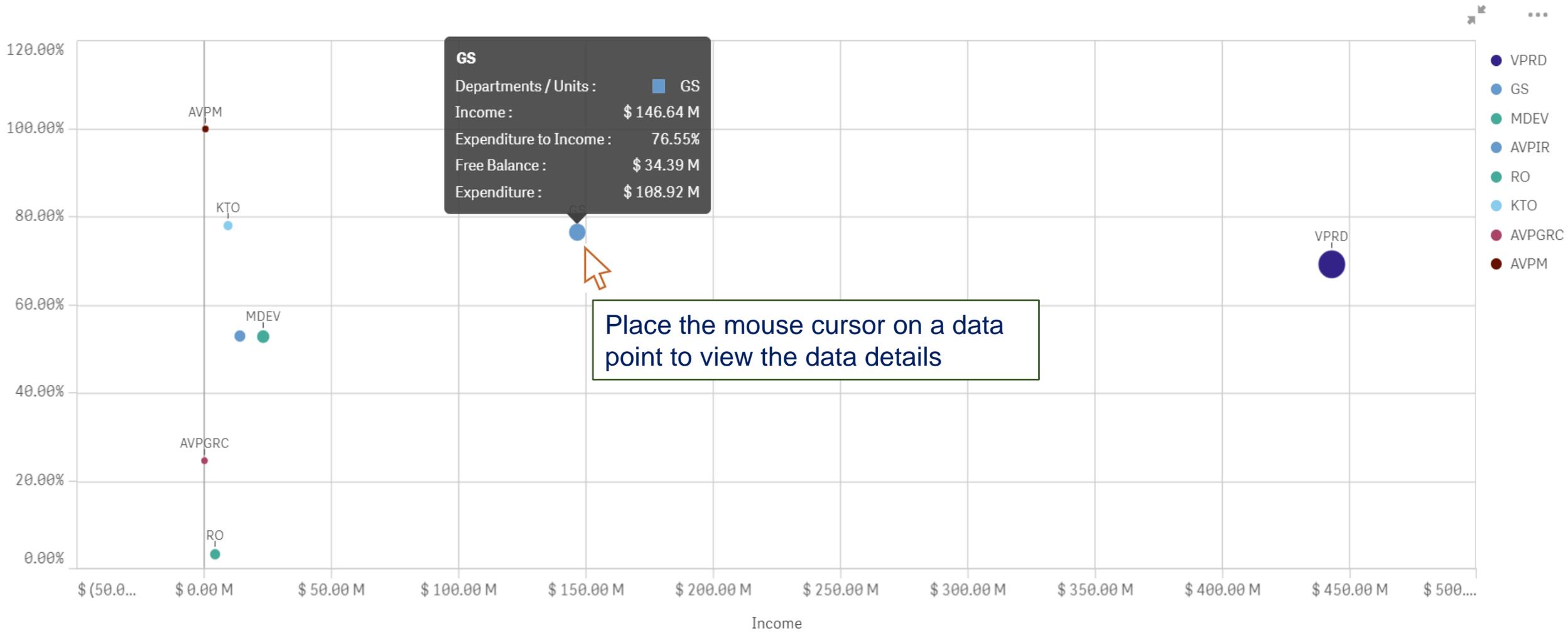
Discard

# View Data Details in the Chart

Income and Expenditure Analysis (Prototype) Analyze Sheet Narrate Storytelling

Staff Cost Com... Temp Budget Clinic Commitm... **Faculties / VP O...**

3.3 Hostels Analysis as at 31-Dec-2021



Place the mouse cursor on a data point to view the data details

Bubble Sizes = Free Balance; Y-axis = Expenditure+Commitment to Income

# View Data Details in the Chart

Income and Expenditure Analysis (Prototype) Analyze Sheet Narrate Storytelling

Staff Cost Com... Include Temp Budget Include Clinic Commitm... Exclude Faculties / VP O... VPRD umbrella

3.3 Hostels Analysis as at 31-Dec-2021

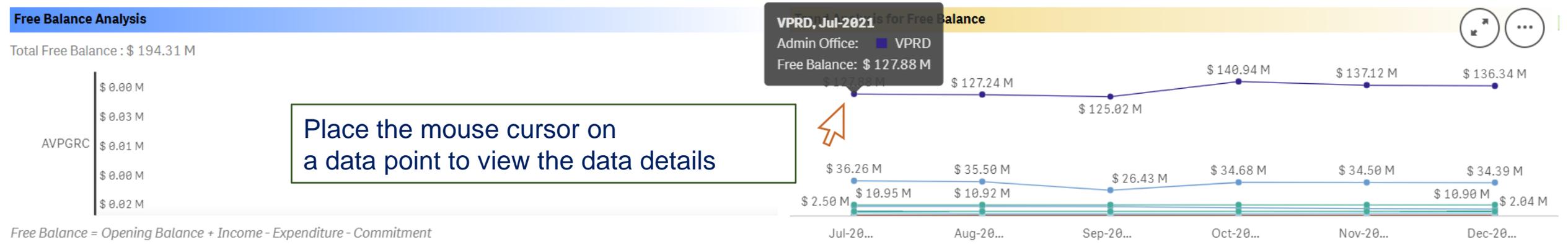
Financial Year / Period: OPENING BALANCE \$ 0.00 M vs Dec-2020

Grouping for Faculties / Admin. Offices: INCOME \$ 640.93 M <sup>▲16.64%</sup> vs Dec-2020

Selection for Staff Cost Commitment / Temp: EXPENDITURE \$ 417.17 M <sup>▲7.27%</sup> vs Dec-2020

COMMITMENT \$ 29.44 M <sup>▼5.18%</sup> vs Dec-2020

FREE BALANCE \$ 194.31 M <sup>▲50.02%</sup> vs Dec-2020

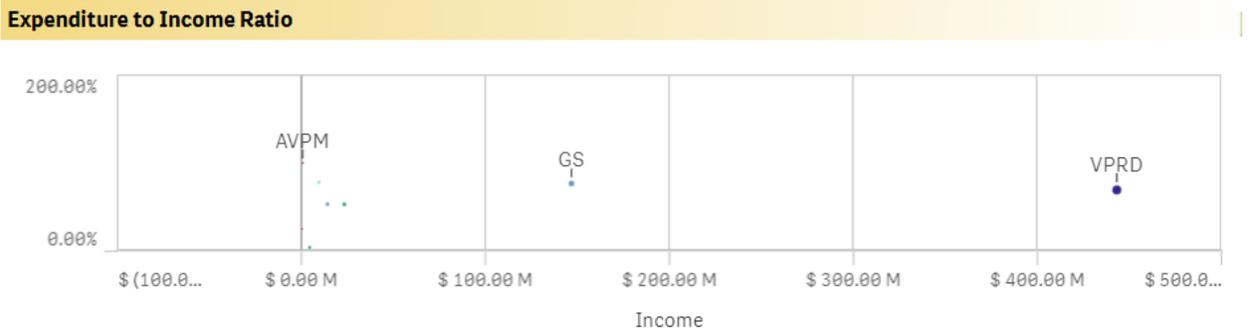


Place the mouse cursor on a data point to view the data details

**VPRD, Jul-2021**

Admin Office: VPRD

Free Balance: \$ 127.88 M



Bubble Sizes = Free Balance; Y-axis = Expenditure + Commitment to Income

# Download Chart Image / Data

# Download Current View

The screenshot displays a Qlik Sense dashboard interface. At the top, there is a navigation bar with a menu icon, the text 'Name of Current Page', and buttons for 'Analyze Sheet' and 'Narrate Storytelling'. Below this, there are tabs for 'Staff Cost Com...', 'Temp Budget', and 'Clinic Commitm...'. A green callout box highlights a menu icon in the top left corner. A larger white callout box with a black border is positioned over the main content area, containing three menu items: 'App overview', 'Open hub', and 'Download sheet as PDF'. A green arrow points from a text box on the right to the 'Download sheet as PDF' option. The background shows a dashboard with a table of data and a sidebar with a table of contents.

Staff Cost Com... Include

Temp Budget Include

Clinic Commitm... Exclude

User Guide and Conte...

Selection

HKBU

User Guide

Glossary

Introduction

Qlik Sense is a data visualization tool built using financial data. In the user guide, you can find more in-depth information, including guidance notes, tutorials on exploring data, and tutorials on different views.

Income and Expenses

Section 1: Free Budget

1.1 Summary of Budgets

App overview

Open hub

Download sheet as PDF

Select to download the current view in PDF

Section 1

3.1 Summary of Budgets

3.2 Clinics

3.3 Hostels

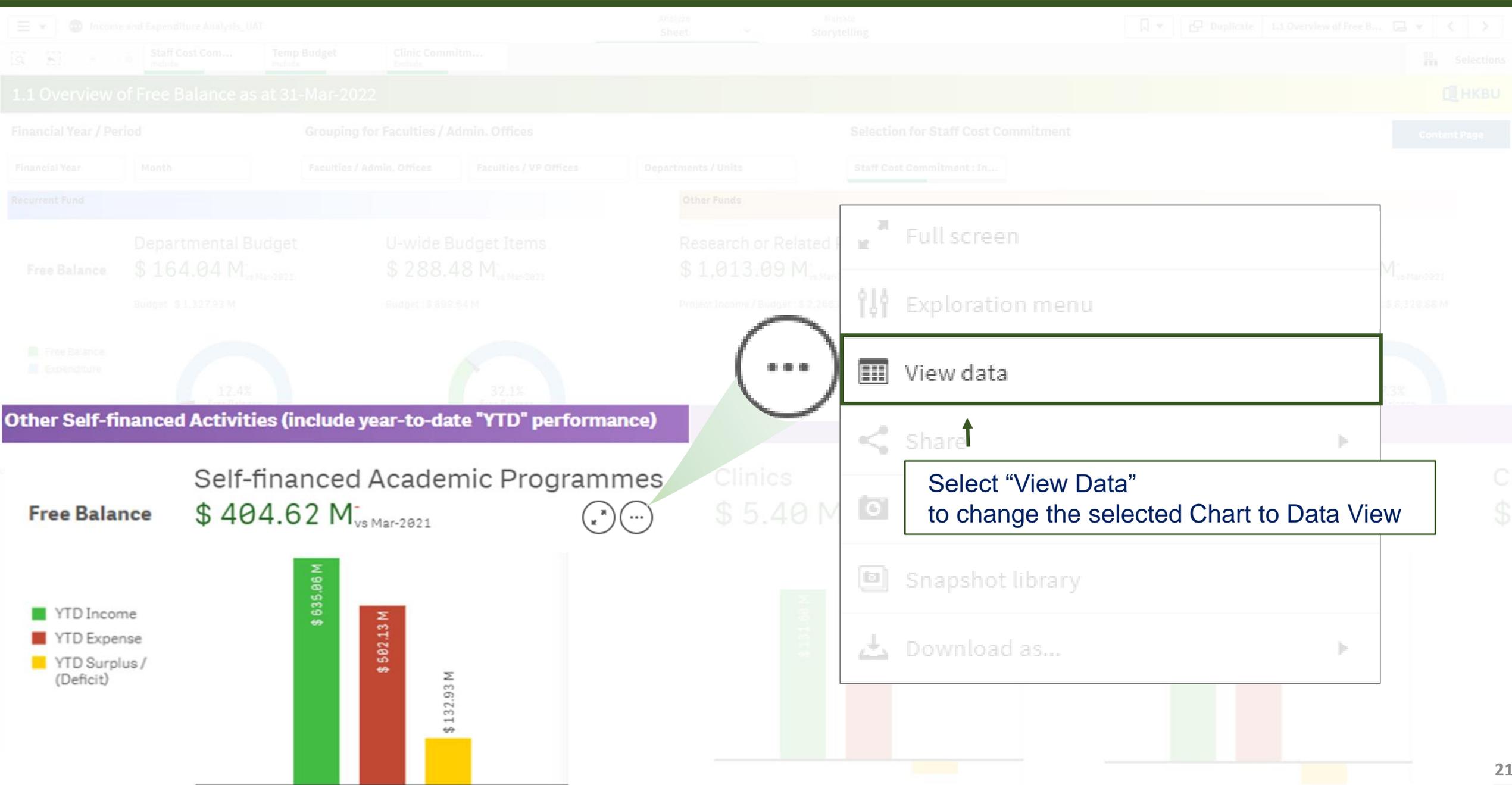
3.4 Chaplain's Office

3.5 Research Projects

3.6 Capital Projects and A&M

3.7 Other Activities

# Visualizations for Individual Charts – View Data



# Visualizations for Individual Charts – View Data

Income and Expenditure Analysis\_UAT

1.1 Overview of Free Balance as at 31-Mar-2022

Financial Year / Period: Financial Year, Month

Grouping for Faculties / Admin. Offices: Faculties / Admin. Offices, Faculties / VP Offices, Departments / Units

Selection for Staff Cost Commitment: Staff Cost Commitment : In...

Free Balance: \$ 16... vs Mar-2021

Budget: \$ 1,3... M

12.4%

32.1%

Other Self-financed Activities (include year-to-date "YTD" performance)

Self-financed Academic Programmes

Free Balance: \$ 404.62 M<sup>-</sup> vs Mar-2021

YTD Income	YTD Expense	YTD Surplus / (Deficit)
\$ 635.06 M	\$ 502.13 M	\$ 132.93 M

Legend:

- YTD Income
- YTD Expense
- YTD Surplus / (Deficit)

View chart

Data

Click to change the selected Data View back to Chart View

Click to download data of the selected chart in Excel format

After "View Data" is selected the selected Chart is changed to Data View

Click to change the selected Data View back to Chart View

View chart

Data

Click to download data of the selected chart in Excel format

# Image/Data Download for Individual Charts

The screenshot shows a financial dashboard with a 'Download as...' menu open over a bar chart. The dashboard includes a navigation bar, a title '1.1 Overview of Free Balance as at 31-Mar-2022', and various filters. The bar chart is titled 'Self-financed Academic Programmes' and shows YTD Income, YTD Expense, and YTD Surplus/Deficit. The 'Download as...' menu is open, showing options for 'Image', 'PDF', and 'Data'. A 'Back' button is also visible in the menu.

**1.1 Overview of Free Balance as at 31-Mar-2022**

Financial Year / Period: Financial Year, Month, Grouping for Faculties / Admin. Offices: Faculties / Admin. Offices, Faculties / VP Offices, Departments / Units

Free Balance: \$ 164.04 M<sup>vs Mar-2021</sup>

Departmental Budget: \$ 1,317.93 M

U-wide Budget Items: \$ 288.48 M<sup>vs Mar-2021</sup>

Budget: \$ 899.64 M

Research or Related P: \$ 1,013.09 M<sup>vs Mar-2021</sup>

Project Income / Budget: \$ 2,266.4 M<sup>vs Mar-2021</sup>

Other Funds: \$ 0.328.88 M<sup>vs Mar-2021</sup>

12.4%

32.1%

44.7%

3.3%

**Other Self-financed Activities (include year-to-date "YTD" performance)**

**Free Balance** **\$ 404.62 M<sup>vs Mar-2021</sup>**

**Self-financed Academic Programmes**

YTD Income: \$ 635.06 M

YTD Expense: \$ 502.13 M

YTD Surplus / (Deficit): \$ 132.93 M

Legend: YTD Income (Green), YTD Expense (Red), YTD Surplus / (Deficit) (Yellow)

Download as... menu options: Back, Image, PDF, Data

# Selection of Criteria for Data Display

# Selection of Criteria for Data Display on Sheet View

Income and Expenditure Analysis, Analyze Sheet, Narrate Storytelling

Staff Cost Com... Include, Temp Budget Include, Clinic Commitm... Exclude

1.1 Overview of Free Balance

Financial Year / Period

Financial Year, Month

Staff Cost Com... Include, Temp Budget Include, Clinic Commitm... Exclude

Free Balance, Budget, Project Income / Budget

These are the selected criteria for filtering the data being displayed

Selected Item; or

If more than one items are selected, then the count of selected items of available items will be displayed (e.g 2 of 16)

Temp Budget Include

Criterion

Two-color bar showing the % of selected items

Green = % of selected items  
Gray = % of not selected items

# Selection of Criteria for Data Display on Sheet View

Income and Expenditure Analysis\_

Analyze Sheet

Narrate Storytelling

Staff Cost Com... Include

Temp Budget Include

Clinic Commitm...

Departments / ...

1.1 Overview of Free Balance as at 31-Mar-2022

Available Criteria are displayed below the Sheet Title

Financial Year / Period

Grouping for Faculties / Admin. Offices

Financial Year

Month

Faculties / Admin. O...

Faculties / VP Offices

Departments / Units

Click to open the dropdown list for selection

Click to select/deselect item(s) in the dropdown list

Then click  to confirm the selection; or click  to cancel the selection

 = selected and included in calculation

 = not selected and excluded in calculation

Data displayed will be refreshed instantly for the selection

Search in listbox

ACLW	
AF	
AR	
ARTD	
BIOL	
BUSD	
CHEM	
CHI	

# Selection of Criteria for Data Display on Sheet View

The screenshot displays a financial analysis tool interface. At the top, there are navigation tabs: 'Income and Expenditure Analysis', 'Analyze Sheet', and 'Narrate Storytelling'. Below these are filter tabs for 'Staff Cost Com...', 'Temp Budget', 'Clinic Commit...', and 'Departments / ...'. The main content area shows a 'Selection for Staff Cost Commitment' section with buttons for 'Recurrent', 'Free Balance', and 'Other Funds'. A callout box highlights three icons: a left arrow, a right arrow, and a circular arrow with an 'X'. A text box explains that user-selected criteria will be displayed on the upper bar and that clicking the 'X' icon deletes the criteria. Below the callout, three text boxes describe the icons: 'Step back (Undo)', 'Step forward (Cancel last Undo)', and 'Cancel all Selection (Restore to Default Selection)'. The bottom section shows a bar chart titled 'Other Self-financed Activities (include year-to-date "YTD" performance)' with data for 'Self-financed Academic Programmes', 'Clinics', 'Hostels', 'Chaplain's Office', and 'School of Continuing Education'. Each category has a bar chart showing 'YTD Income', 'YTD Expend', and 'YTD Surplus/Deficit'.

Income and Expenditure Analysis

Analyze Sheet

Narrate Storytelling

Staff Cost Com... Include

Temp Budget Include

Clinic Commit... Exclude

Departments / ... 20 of 200

1.1 Overview of Free Balance as at 31-Mar-2022

Financials for Faculties / Admin. Offices

Selection for Staff Cost Commitment

Content Page

Recurrent

Free Balance

Other Funds

Other Activities \$ 3,099.80 M<sub>vs Mar-2021</sub>

Project Income / Budget : \$ 2,266.48 M

Project Income / Budget : \$ 3,681.48 M

Project Income / Budget : \$ 8,328.88 M

32.1%

40.7%

48.9%

37.3%

Free Balance

100.0%

100.0%

Other Self-financed Activities (include year-to-date "YTD" performance)

Free Balance

Self-financed Academic Programmes \$ 404.62 M<sub>vs Mar-2021</sub>

Clinics \$ 5.40 M<sub>vs Mar-2021</sub>

Hostels \$ 22.72 M<sub>vs Mar-2021</sub>

Chaplain's Office \$ 14.03 M<sub>vs Mar-2021</sub>

School of Continuing Education \$ 602.84 M<sub>vs Mar-2021</sub>

YTD Income

YTD Expend

YTD Surplus/Deficit

# Bookmark a Sheet

# Bookmark Button on the Top Toolbar

User can save a view for future retrieval using the bookmark function

The screenshot shows a financial reporting dashboard with various data points and charts. A callout box highlights the bookmark function in the top toolbar. The callout box contains the following text:

**Bookmarks**

Create new bookmark

Select "Create new bookmark" to save the current view selections/settings for future use

The dashboard displays the following data:

- 1.1 Overview of Free Balance as at 31-Mar-2022**
- Departmental Budget**: Free Balance \$ 164.04 M vs Mar-2021, Budget: \$ 1,327.93 M. Free Balance is 12.4% of the budget.
- U-wide Budget**: Free Balance \$ 288.4 M vs Mar-2021, Budget: \$ 800.0 M. Free Balance is 37.3% of the budget.
- Other Self-financed Activities (include year-to-date "YTD" performance)**
- Self-financed Academic Programmes**: Free Balance \$ 404.62 M vs Mar-2021. YTD Income: \$ 635.86 M, YTD Expense: \$ 562.13 M, YTD Surplus/Deficit: \$ 132.93 M.
- School of Continuing Education**: Free Balance \$ 602.84 M vs Mar-2021, 5.58% increase. YTD Income: \$ 286.77 M, YTD Expense: \$ 319.56 M, YTD Surplus/Deficit: \$ 151.1 M.

# Create a New Bookmark

The screenshot shows a financial analysis software interface with a 'Create bookmark' dialog box overlaid. The dialog box contains the following elements:

- Title:** A text input field with the placeholder text 'Input a Name for the Bookmark' and a callout '1'.
- Description (Optional):** A large text area for entering a description.
- Save sheet location:** A checkbox that is currently unchecked.
- Save layout:** A checkbox that is currently unchecked. A callout box points to this checkbox with the text: 'Include the layout, for example, sorting and presentation of charts'. A larger callout '2' points to the 'Save layout' checkbox area with the text: 'Turn on "Save layout", if appropriate'.
- Buttons:** A 'Click to Create' button with callout '3' and a green 'Create' button.

The background interface shows a dashboard for 'Income and Expenditure Analysis' with various charts and data points. A green arrow points from the bookmark icon in the top right corner of the software to the 'Create bookmark' dialog box.

# Create a New Bookmark

Income and Expenditure Analysis\_ Analyze Sheet Narrate Storytelling Duplicate 1.1 Overview of Free B... Selections

Staff Cost Com... temp budget Clinic Commitm... HKBU

## 1.1 Overview of Free Balance as at 31-Mar-2022

Financial Year / Period: Financial Year, Month

Grouping for Faculties / Admin. Offices: Faculties / Admin. Offices, Faculties / VI

Selection for Staff Cost Commitment

Content Page

Departmental Budget: Free Balance \$ 164.04 M vs Mar-2021

U-wide Budget Items: Free Balance \$ 288.48 M vs Mar-2021

Other Activities: Free Balance \$ 3,099.80 M vs Mar-2021

Project Income / Budget: \$ 8,320.88 M

Free Balance: 12.4%, 32.1%, 37.3%

Other Self-financed Activities (include year-to-date "YTD" performance)

Self-financed Academic Programmes: Free Balance \$ 404.62 M vs Mar-2021

Clinics: Free Balance \$ 5.40 M

YTD Income, YTD Expense, YTD Surplus/ (Deficit)

School of Continuing Education: Free Balance \$ 602.84 M vs Mar-2021

YTD Income: \$ 189.27 M, YTD Expense: \$ 319.56 M

**Bookmarks** Create new bookmark

Search

▼ My bookmarks (1)

Sample 4/19/2022 ⓘ

Your saved bookmark will be listed here, you can select and click to open it

Select and place the cursor on the bookmark to display the information icon

# Delete/Edit a Bookmark

The screenshot shows a financial analysis dashboard with a 'Bookmarks' modal open. The modal displays a bookmark for '1.1 Overview of Free Balance as at 31-Mar-2022' with an edit icon. A callout box points to the edit icon with instructions.

**Bookmarks** Create new bookmark

Search

▼ My bookmarks (1)

Sample 4/19/2022 *i*

**Location:** 1.1 Overview of Free Balance as at 31-Mar-2022  
**Layout state:** None

**<default state>:**  
Selections: Faculties / VP Offices, Staff Cost Commitment, Temp Budget, Clinic Commitment  
Set expression

```
{<[Faculties / VP Offices]='ARTS',[Staff Cost Commitment]='Include',[Temp Budget]='Include',
```

Copy

Click on this icon to

- delete the bookmark; or
- edit the bookmark name and description

# Open a Bookmarked View

The screenshot shows a financial dashboard interface. At the top, there is a navigation bar with a menu icon, the title "Income and Expenditure Analysis", and buttons for "Analyze Sheet" and "Narrate Storytelling". Below this is a header section for "Income and Expenditure Analysis\_UAT" with a thumbnail image and metadata: "Data last loaded: Apr 19, 2022, 11:05 AM", "Published: Apr 15, 2022, 9:31 AM", and "Published to: Financial Dashboard (FO - IE)".

The main navigation area contains three tabs: "Sheets", "Bookmarks", and "Stories". The "Bookmarks" tab is highlighted with a green box, and a callout box points to it with the text "Select 'Bookmarks' to view/open your saved Bookmarks".

Below the navigation is a search bar with a magnifying glass icon and the text "Search".

The main content area is titled "My bookmarks (1)" with a dropdown arrow. It displays a single bookmark entry:

Sample	4/19/2022
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A callout box points to the "Sample" text with the text "Click the bookmark name to open it".

# For enquiries



[fosys@hkbu.edu.hk](mailto:fosys@hkbu.edu.hk)



Hotline: 3411 5587

~ **End** ~

