The SDUSD Oracle reporting and business intelligence technology (ORBIT) application is a comprehensive business intelligence platform that delivers a full range of analytic and reporting capabilities. ORBIT delivers contextual, relevant, and actionable insight to everyone in the district, resulting in improved decision-making, better informed actions, and more efficient business process. ORBIT ensures that all metrics, calculations and definitions are uniformly consistent to provide better alignment and visibility across the district.

1. Open internet browser (internet explorer, mozilla firefox...etc.) to access ORBIT type on the address bar the URL https://orbit.sandi.net or from the SDUSD home page navigate to Staff > Applications > ORBIT. Click on ORBIT to launch the log in page. (Fig 1 & Fig 1a). While most internet browsers can be used, the preferred browser to utilize all functionality in ORBIT is Firefox.”
**SDUSD General Ledger - Budget vs. Actuals**

SDUSD orbit log in page uses the same access credentials provided by the district to log-in to the district's computers, email, peoplesoft, etc. Enter your Employee ID and Password. Click Log In button to complete the process. **Note**: Please **DO NOT** share your Password.

---

**Fig 2**: Logging in to SDUSD Orbit using district’s credentials Employee ID and Password.
ORBIT - SDUSD BUSINESS INTELLIGENCE

SDUSD General Ledger - Budget vs. Actuals

Log in and Quick Start Guide:

The first screen you will see once you are logged-in to ORBIT is the landing page (fig 3). The first report you will see is the district wide student attendance percentages - gauges and bar charts.

Fig 3: ORBIT landing page default attendance charts.

To access ORBIT’s general ledger SDUSD budget vs. actuals, navigate to the dashboard navigation tabs to **FINANCIALS** then **GENERAL LEDGER** (fig 4 and fig 5)

Fig 4: Navigate to ORBIT financials dashboard.
THE BUDGET VS. ACTUALS TAB DASHBOARD REPORT WILL SHOW CURRENT FYTD BUDGET, EXPENSES AND REMAINING BALANCE (LEFT SIDE) AND THE EXPENSES YEAR OVER YEAR WITH BALANCE (RIGHT SIDE) INFORMATION (FIG 6).

**Fig 6:** ORBIT FINANCIAL GL—BUDGET VS. ACTUALS DASHBOARD LANDING PAGE.
The chart and values displayed in the default GL Dashboard budget vs. actuals landing page will be defined based upon the security role assigned to the user. If a user is assigned to a certain department or site, the user will only be able to access budget information for that particular site. Multi access role will be assigned to those that oversee or manage multiple sites, resources, funds, etc. Additionally, along the top of the ORBIT Dashboard, the user will only see reports he/she was given access to. This again is defined or based upon individual’s role in the organization or site the user is responsible for. Users should not expect to see all of these reports in the dashboard drop down choices (Fig 7). If a user manages multiple sites or programs, accounts, resources, etc. this would be considered by the security manager when assigning roles and access to individuals.

The second tab of this dashboard report is the year-over-year spending report. Details about the spending report is found in this job aid starting at page 14 of this job aid.

In the example below (Fig 8) the user from dept/school/site will only see the budget information of that dept./site the initial display will show total aggregate of all budget transactions for current FY and previous FY if specified. This is identified by the information visible on the parameter/criteria fields. The criteria field is parameter prompt to narrow/expand search result or detail. This is accomplished by specifying the different valid combination of chart of account (COA) codes used in Peoplesoft.

As an example, if a user from dept 5538 decides to narrow or filter the search by specifying resource and account codes, then these code must be entered in the criteria parameter fields. To do this, the following steps will demonstrate adding parameters on the search criteria.

1. Adding resource code. Click on resource criteria ellipse and a new selection window will open up.
2. Type the resource code ‘00000’ on the match field box and then click the ‘Go’ button. The match criteria can also be changed from ‘begins with’ to other choices if desired. The user can also scroll or browse through the returned choices instead of typing the code value. In this case, resource code ‘00000’ is on top of the returned choices so it is easier to pick the value from the list than typing it on the matching box.

3. Choose the resource code ‘00000’ from the choices box and then click the move button to move the selected value to the ‘Selected’ box. Double clicking the desired code will also move that value to the left box (selected). Multiple resource codes can be added to the selection box if the user wishes to search for more than one resource. This also applies to the other selection criteria.

4. Resource ‘00000’ has been selected and moved to the to ‘Selected’ box. Click ‘OK’ button. Additional resource code can be added to the selection box if desired following the same steps as above. To remove or unselect a value from the selected box, double click the value and it should be moved back to choices box. You can also use the right arrow button.

5. Resource ‘00000’ is now added to the search criteria parameter field as a filter. Follow the same steps 2-4 to add more filters using other COA codes to narrow the search.

6. To further narrow the search, GL account code ‘4301’ is added as a search parameter. Steps 1 to 4 above outline the process of adding search parameters to the criteria fields. Once again multiple account codes can be added in the selection box if desired. Follow steps 2-4 above to add more codes to search.
7. GL account code '4301' is now added to the criteria fields.


**SDUSD General Ledger Budget vs. Actuals Report.**

1. SDUSD budget vs. actuals dashboard report tab/name.
2. Search criteria parameter input fields.
3. Current fiscal year budget, pre-enc, enc, exp and balance chart summary report.
5. Multi year budget vs. actuals year over year chart summary report.
6. Multi year budget vs. actuals year over year pivot table summary report.

**General Ledger**

1. Budget vs. Actuals BI dashboard
2. Search criteria parameter input fields
3. Current fiscal year budget, pre-enc, enc, exp and balance chart summary report
4. Current fiscal year budget, pre-enc, enc, exp and balance pivot table summary report
5. Multi year budget vs. actuals year over year chart summary report
6. Multi year budget vs. actuals year over year pivot table summary report

**Current Fiscal Year Budget, Expenses, and Remaining Balance**

4. Current FY Budget, Pre-enc, Enc, Expense pivot table
5. Multi year Budget vs. Actual pivot table
6. Multi year Budget vs. Actual pivot table

**Current Fiscal Year Budget, Expenses, and Remaining Balance**

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Department</th>
<th>Resource</th>
<th>GL Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011-2012</td>
<td>10003</td>
<td>00000</td>
<td>4301</td>
</tr>
</tbody>
</table>

**Budget vs Actual w/ Balance**

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Adjusted Budget</th>
<th>Actual</th>
<th>Remaining Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>$8,659.09</td>
<td>$7,129.57</td>
<td>$1,530.46</td>
</tr>
<tr>
<td>2012</td>
<td>$2,643.00</td>
<td>$4,655.00</td>
<td>$2,012.00</td>
</tr>
<tr>
<td>2013</td>
<td>$22,755.20</td>
<td>$44,99</td>
<td>$17,742.83</td>
</tr>
</tbody>
</table>

Refresh - Print - Download
### SDUSD General Ledger - Budget vs. Actuals

#### Current Fiscal Year Budget, Expenses, and Remaining Balance

<table>
<thead>
<tr>
<th>Dept Code and Desc</th>
<th>Original Budget</th>
<th>Transfer</th>
<th>Adjusted Budget</th>
<th>Actual Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>9003 Adams Elementary</td>
<td>$22,766.20</td>
<td></td>
<td></td>
<td>$22,766.20</td>
</tr>
</tbody>
</table>

#### Pivot Chart

- **1. Original Budget**: Approved budgeted amount
- **2. Transfers** (drillable): +/- amount fytd budget transfers
- **3. Adjustments**
- **4. Budget**: Total original budget +/- transfers
- **5. Pre-Encumbrance** (drillable): Accumulated fytd pre-encumbrance
- **6. Encumbrance** (drillable): Accumulated fytd encumbrance
- **7. Paid Expenses** (drillable): Accumulated fytd expenses
- **8. Balance Remaining**: Budget-(preenc+enc+exp)

**Note:** To view the restricted/unrestricted resources for the site, scroll to the bottom of the dashboard report page. Refer to page 11 of this job aid for details of the report.

#### Drilldown Details - Budget Transfers and Adjustments

<table>
<thead>
<tr>
<th>Dept Code and Desc</th>
<th>Original</th>
<th>Transfer</th>
<th>Adjusted</th>
<th>Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>0349 Mira Mesa High</td>
<td>$12,384,196.51</td>
<td>$25,548.00</td>
<td>$850,657.72</td>
<td>$13,260,402.28</td>
</tr>
</tbody>
</table>

**FYTD Transfers Detail Drilldown Result is Shown.** The first 25 records will display. Clicking the all pages button will display the rest of the transaction records (if there are more than 25 records). Click on the fiscal year 2012 link to get to the next level of detail by quarter. At the bottom of the table, a menu to allow user to return to previous display, refresh, print, download or bookmark the details currently displayed page.

**Fiscal Quarter Transfers Detail.** Budget transfers list the quarterly total amount of transfers for any given budget or combination of specific coa. Click on the fiscal quarter to get to the period detail.

**Fiscal Period Transfers Detail.** Budget transfers list the fiscal period total amount of transfers for any given budget or combination of specific coa.
Drilldown details - Pre-enc, encumbrance, expense details.

Pre-enc, encumbrance and expense totals are active links to drilldown to transaction details. Click any of the total and detail transactions list will display for a particular search using any combination of valid COA.

Pre-enc drilldown (expense-pr) to transaction details. Click fiscal year link to display the next pre-enc level of detail (fiscal quarter thru fiscal period).

Encumbrance drilldown (expense-en) to transaction details. Click fiscal year link to display the next encumbrance level of detail (fiscal quarter thru fiscal period).

Expense drilldown (expense-ex) to transaction details. Click fiscal year link to display the next expense level of detail (fiscal quarter thru fiscal period).

Any of the charts or data tables can be downloaded into different formats if desired. Download instruction is discussed starting on page 12 of this job aid.
**Multi year budget vs. actuals expenses year over year drilldown is available in 4 different variation.**

- **Budget vs. Actual with Balance**
- **Budget vs. Actual**
- **Budget vs. Actual Detail**
- **Budget vs. Actual Detail (Restricted/Unrestricted)**

**Drilldown will show chronological order of fiscal qtr. detail beginning with current fiscal year/quarter and previous years towards the bottom of the list. Even though a particular fiscal year was selected, all transactions for all years will be returned and displayed. Hopefully in future release, specific fiscal year detail will only display instead for all years. Click view all pages button to display all transactions. Click fiscal quarter link to drill down to fiscal period detail.**

**Drilldown for fiscal period detail. By fiscal quarter/fiscal year. Chronologically shown by fiscal period/fiscal period/fiscal year detail. Just be aware that future release of budget vs. actuals reports will filter by period/quarter/fiscal year instead of showing all the details for all years. Use the view all pages button to get view all transactions and then scroll down to the particular period or transaction of interest.**
SDUSD General Ledger - Budget vs. Actuals

Current FY - Restricted / Unrestricted Resources Report - Budget/Expenses. These dashboards show restricted and unrestricted resources, encumbrance, expenses, and remaining balance as well as site-controlled resources.

- Current Fiscal Year Restricted Resources Budget, expenses, and balance report. Can be viewed in graphical format or pivot table. Available are restricted site/Non-site controlled resources chart or pivot table. To change view option, click on the down arrow, and different options will be displayed. Hovering through the color-coded chart will provide budgetary amount for each of the different categories.

- Current Fiscal Year Unrestricted Resources Budget, expenses, and balance report. Can be viewed in graphical format or pivot table view. Also available are Unrestricted site/Non-Site controlled resources chart or pivot table. To change view option, click on the down arrow, and different options will be displayed. Hovering through the color-coded chart will provide budgetary amount for each of the different categories.
Download functionality is an available option in ORBIT. Drilldown detail data can be downloaded to spreadsheet (excel). To download a particular series of data from the dashboard report, click on ‘DOWNLOAD’ link. Different download format are available.

1. Choose ‘Download to Excel for spreadsheet data format.
2. Download to PowerPoint if you desire to capture a chart/graph for use in presentation document.
3. Download to excel 2007 for older version of excel.
4. Download data for CSV format.
5. Download to HTML to create a separate HTML page.

When ‘Download to Excel’ is selected the following window will open. Click ‘OK’ and the spreadsheet file will open with the data set including the header. You can delete the header and other document labels that are not relevant (page header, page definition… etc).
When 'download to PowerPoint' is selected the following window will open. Click ‘OK’ and the PowerPoint file will open with the chart which can be included in presentation slides. The same download instruction apply to other download format like older Excel version, CSV file or HTML web format.

NOTE: Download to PowerPoint only supports up to Microsoft Office 2007 only for this current ORBIT release.
Tab 2 of GL Budget vs. Actuals report offers a quick presentation of year over year spending data. It is offered in two flavors:
1. Expenses by Fiscal Quarter
2. Expenses by Fiscal Year

**Expenses by Fiscal Year:**
The chart is interactive. Hovering over the bar displays total spending for the year. It is also an active link. Clicking the bar will open the spending detail by month.

**Expenses by Fiscal Quarter:**
The chart is interactive. Hovering over the bar displays total spending for each quarter. It is also an active link. Clicking the bar will open the spending detail by month.
Expenses detail by month is the lowest level of detail available for viewing spending, adjustment or transfers. When hovering over the chart at this level, option to view data details for invoices/expense, transfers and adjustment are available.

Screenshot of the sample detail for expense transactions. Report view selector drop down offers different report views as well. It also offers the option of viewing specific budget string at a time using the drop down pick list.