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5. Select an Appropriation from the drop-down menu. If it is already populated, this
means that there is only one appropriation for this dlevel. If the appropriation area

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b. In most instances, Total YE Proj should equal Budget for SBS Codes

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disregard that fund and move on to another one that is actively in use. Care must be taken
to review each and every fund to ensure that projections have been entered for all active
funds.
Return to top
Auxiliary, Recharge, Enterprise, and Leasing Funds
These types of funds (F3, F7, FE, and FL) require projections at the fund # level. In
addition, the DLEVEL field will automatically be cleared or grayed out when selecting any of
these fund types. This was intentionally put in place so the Fund Balances would reflect the
most accurate figures as many units have these types of funds spread out among multiple
dlevels.

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Equipment
 Currently, there is not a mechanism in place to handle equipment projections to an F1
that does not yet have activity. If you need to project the expenditure and revenue for
recharge activity equipment and the appropriate F1 is not included in the drop-down
menu, please email Lynn Wrightsman to have this information added to the file prior to
completing and submitting your report.
Return to top
Additional Controls
SBS Codes Reference List
The SBS Codes Reference List may be used to locate appropriate SBS codes for use in
entering projections and allows

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Close
Clicking the button will close both the Dashboard and the workbook in the
background. It will prompt you to save if any changes have been made. Click the red X on
the top right of the Dashboard to just close the Dashboard window.
 Return to top
See Your Data
If you want to see exactly what the Dashboard is accessing, selecting the
EXWWRQZLOODXWRPDWLFDOO\ILOWHUWKHWDEOHRQWKH³)03LYRW´WDEWRWKH)LQDQFLDO0DQDJHUWKDW
is selected in the Dashboard. This table can be manipulated in any way you would like as
the Dashboard does not depend on this tab in any way. The FM Pivot is there for your use
so feel free to play around with it. Click to bring the Dashboard back in to
view.
 Return to top
Projection Checklist
This tool allows you to keep track of which dlevels and fund types have been projected and
will essentially cross those fund types off the list. If you have auxiliary, recharge,
enterprise, or leasing funds, those fund types will be displayed under the dlevels with the
actual fund # listed and crossed off (if projections are complete). If a fund # still needs
projections, the fund type of that fund will remain in white. For reference purposes, the
boxes next to each fund type ZLOOFRQWDLQDQ³;´WRindicate that comments have been
entered.
 Return to top
Add/Edit Comments
At any time projections can be entered, so can comments. The comments window will
display the current levels selected and if there are existing comments they will populate in
the text box.
Clicking in the Comments window will write the comments to a spreadsheet
but will not save the file. If you close the file without saving (either using the save buttons
on the main Dashboard or saving projections), the comments will be lost.
The comments that have been written to the file can be viewed by selecting the
³&RPPHQWV´WDEPlease do not alter this worksheet in any way

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Known Issues
▪ A fund or dlevel that does not have any current activity will not populate in the
dashboard. If projections are necessary, please email Lynn Wrightsman to have this
information added to the file.
▪ When entering depreciation projections, the reserve fund drop-down list will display
ALL