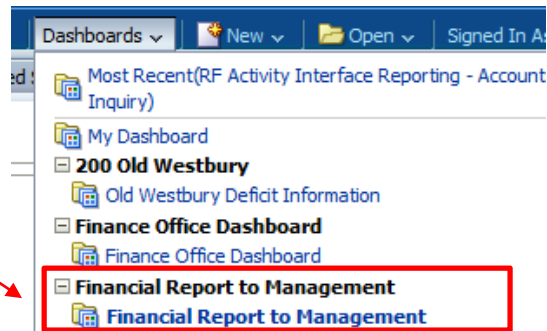


Quick Start Guide

Financial Report to Management (FRM) Dashboard

1 The **RF Report Center** is accessed through the RF website (See the *Access the Report Center Quick Start Guide* for both InCommon and “Click-Through” instructions).

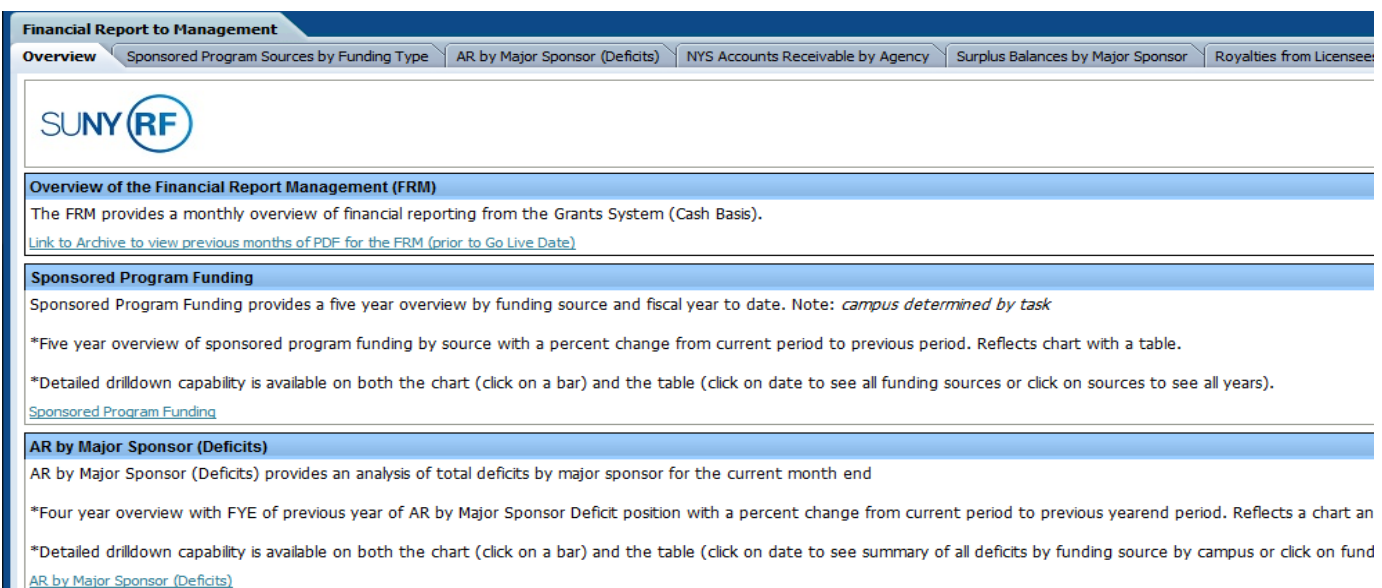
2 From the RF Report Center menu, under **Dashboards**, select **Financial Report to Management (FRM)**.



3 The **FRM Dashboard** has pages, known as tabs, each displaying different financial overview information, with capability to drill into all higher level charts (anywhere there is a blue font is drillable).



4 The **Overview** tab has all tab descriptions and links to the appropriate tab of interest.



Financial Report to Management

Overview | Sponsored Program Sources by Funding Type | AR by Major Sponsor (Deficits) | NYS Accounts Receivable by Agency | Surplus Balances by Major Sponsor | Royalties from Licensees

SUNY RF

Overview of the Financial Report Management (FRM)
The FRM provides a monthly overview of financial reporting from the Grants System (Cash Basis).
[Link to Archive to view previous months of PDF for the FRM \(prior to Go Live Date\)](#)

Sponsored Program Funding
Sponsored Program Funding provides a five year overview by funding source and fiscal year to date. Note: *campus determined by task*
*Five year overview of sponsored program funding by source with a percent change from current period to previous period. Reflects chart with a table.
*Detailed drilldown capability is available on both the chart (click on a bar) and the table (click on date to see all funding sources or click on sources to see all years).
[Sponsored Program Funding](#)

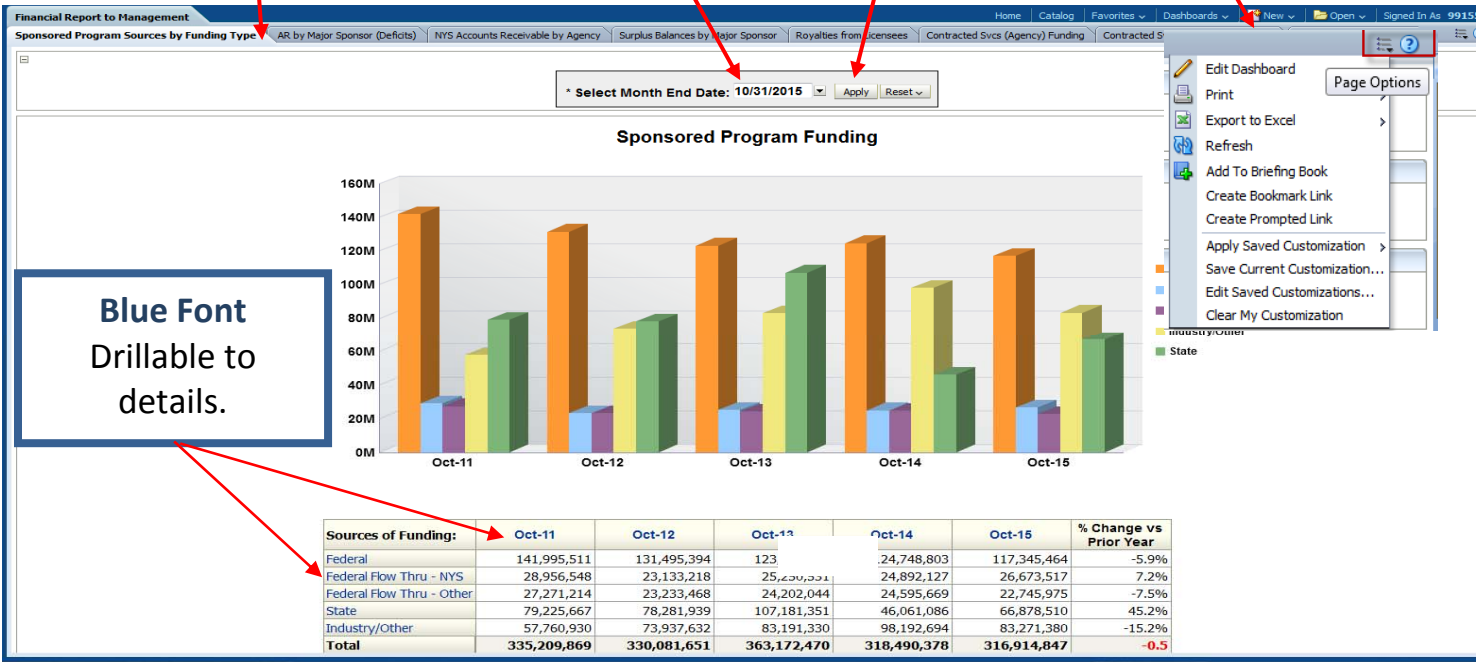
AR by Major Sponsor (Deficits)
AR by Major Sponsor (Deficits) provides an analysis of total deficits by major sponsor for the current month end
*Four year overview with FYE of previous year of AR by Major Sponsor Deficit position with a percent change from current period to previous yearend period. Reflects a chart and
*Detailed drilldown capability is available on both the chart (click on a bar) and the table (click on date to see summary of all deficits by funding source by campus or click on fund
[AR by Major Sponsor \(Deficits\)](#)

5 Select a tab within the FRM dashboard.

TABS
Navigate between tabs.

FILTERS
Apply criteria to your results. Click "Apply" to run.

PAGE OPTIONS
Advanced features menu for dashboard configurations.



[Refresh](#) - [Print](#) - [Export](#)

[Refresh](#) - [Print](#) - [Export](#)

Refresh: Click Refresh to re-run the analysis

Print: Click Print and select either a printable PDF or a printable HTML document.

Export: Click Export and download your data

- As a printable PDF, an Excel worksheet, a PowerPoint slide, or a Web Archive file.
- As a CSV file, or an XML, or a Tab Delimited file.

For more information, go to the Self Pace Navigation Course located on the **Overview** tab.