Cal Answers Top Tips

Top 10 Finance Dashboard Tips

1. **Financial Management Reporting (FMR)** displays data in financial management reporting signage (like CalPlanning). This is the same data sourced from BFS for the **General Ledger (GL) and Multi-Year Reporting (MYR) dashboards** which display data in accounting [debit +/credit (-)] signage.

2. Make sure when first setting up a dashboard to select an additional prompt along with the defaulted values to return data results. Not getting results?

3. **Apply!** Don't forget to select the **Apply** button to update your dashboard report with your filter selections.

4. The **Filters Key box** under the dashboard data table defines the applied filters used to generate the results displayed in the table.

5. Right-click in the data table to **Exclude, Include** and **Move** data columns to customize the layout to meet your specific reporting need.

6. Use **Clear My Customizations** in the **Page Options** dropdown menu to remove all applied filters and data table layout changes.

7. Use the Export hyperlink under the data table and choose **-> Data –> CSV** to send raw data to Excel for pivoting. *(this file will contain all of the displayed data as well as the includable columns)*

8. Create Saved Customizations to quickly access your favorite and/or frequently used filtered and formatted data table views of specific dashboards.

9. Utilize Bookmark Links to share filtered and formatted dashboard reports with your peers.

10. If you have questions, start with the Finance Wikis to find report documentation and data dictionaries for each of the subject areas. Then contact the Cal Answers Help Desk, by emailing calanswers-help@berkeley.edu.