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**.

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