The Cal Answers Multi-Year Reporting dashboard enables approved Cal Answers Finance users to view the same data that is available in the General Ledger Reporting by and across multiple fiscal years at the summary or transaction detail level. Each report tab has a two-page set of dashboard prompts. You must pick at least one prompt on the first page, and the second page is optional if you want to further narrow your search. The report data is displayed in accounting (credit/debit) signage similar to the BAIRS Financials Reports. Review the Multi-Year Reporting Wiki pages for more details on each of the three reports and a data dictionary of terms.

Accessing the Cal Answers Multi-Year Reporting Dashboard

1. Go to calanswers.berkeley.edu to log into the Cal Answers tool. Chrome or Firefox are the recommended browsers.
2. Click on the Log in link on the Cal Answers home page and when prompted enter your CalNet ID and passphrase. This takes you to the Home page of the Cal Answers application.
3. From the Financial Dashboards section, click on Finance and then select Multi-Year Reporting.

Note: The Multi-Year Reporting dashboard is also accessible from the Cal Answers Dashboards dropdown in the blue toolbar.
Multi-Year Reporting Dashboard Reports

1. Overview Tab

The Overview tab is the starting point for the dashboard. It includes links to the individual reporting tabs, as well as descriptions of each tab. It also includes links to the Finance Wiki which provides Cal Answers Financials Multi-Year Reporting documentation and a data dictionary for the filters and columns in the dashboard.

For questions or suggestions please email calanswers-help@berkeley.edu
Getting Started with Multi-Year Reporting

2. Multi-Year Summary Report

The Multi-Year Summary report displays summary information and balances across the chartfields via a two-page set of dashboard prompts. The dashboard prompts will carry any selected values across the tabs of the Multi-Year Reporting dashboard, with the exception of the "Accounting Period as of" prompt. This report data is summarized into columns for Actuals Amount, Encumbrance Amount, and Remaining Balance (less encumbrances). Three additional metrics can be added to the table with a right click—Authorized Budget Amount, Ending Funding Balance and Temporary Budget Amount. In order to support views to multiple years of data, the Multi-Year reports uses two pages of dashboard prompts per report navigable via the additional Next and Previous buttons in the Prompt section.

1st Page of Multi-Year Summary Dashboard Prompts

Select at least one additional filter from the dashboard prompts then click Apply to return your results or Next to navigate to the second page of the dashboard prompts where you can select additional filters.

Multiple Fiscal Year options

The Accounting Period as of filter applies to all fiscal years selected.

2nd Page of Multi-Year Summary Dashboard Prompts

From the second page of dashboard prompts you can narrow your results by selecting additional filters and clicking the Apply button. Use the Cancel button to remove all filter selections from both pages.

Click Previous to return to the first page of dashboard prompts.
Getting Started with Multi-Year Reporting

3. Multi-Year Summary Report – Apply option to review results by two Selected Views

1. **Default Select View** displays the concatenated code and descriptions for Dept ID, Fund and Account Category,

2. **Expanded Select View** adds CF1, CF2 and Program codes to the default view to display the full chartstring. Selected views persist when NEXT in the dashboard prompts is clicked.

4. Multi-Year Summary Report – Next option to access additional prompts

Right-click in the data table to display list of **Includable** columns. Review the wiki for a complete list of includable columns.

Select the desired dashboard prompts and then click the **Apply** button to update the data table.

Like your filtered and/or edited table report view? Create a Saved Customization to apply again and again.
5. By Start and End Month Report—Apply option to review results by two Selected Views

This report displays data in a monthly format for tracking financial trends and seasonality. The data includes activity in all accounts for both current and non-current funds. You are not limited by fiscal year, so this report is helpful for tracking monthly activity across fiscal years.

Select View offers two data table view options:
- Summary (Default) view displays the concatenated code and descriptions for Account Group and Account Category
- Expanded adds the Dept ID, Fund, CF1 and CF2 codes to display the full description

Start and End Months default to current month last year and current month this year.

Blue arrows under the data table allow you to page down the rows or up the rows of the data table. Click the double sided arrow to display all rows of available data.

Clickable blue values in the data table allow you to drill into activity details.

Right click in data table -> Include columns to display a list of includable fields to customize report. Complete lists of includable fields available in the wiki.

Filters values persist across tabs
Select the desired dashboard prompts and then click the Apply button to update the data table.

Any query that runs for more than 10 minutes will be cancelled. If this occurs, please narrow your search and click Apply again.

Select from at least one additional filter below, then click Apply to run or Next for more options.

For column definitions, formulas and other notes please access the Finance wiki.
6. **By Start and End Month Report—Next option to access additional prompts**

From the second page of the dashboard prompts you can narrow your results by selecting additional filters and clicking the Apply button. Use the Cancel button to remove all applied filter selections from both pages. Previous returns you to the first page of dashboard prompts.

Click the Print link and select Printable PDF for printing or Printable HTML for viewing and printing from your browser with additional formatting options.

Cal Answers applies a 120,000 row limit when exporting data from these dashboards. If your report exceeds 120,000 rows, utilize the filters to further narrow your results and/or export in batches by time, account, org, fund, etc.

Click the Export link to send the data to Excel. Select Excel format to download formatted data. Select Data->CSV format to download raw data.
Getting Started with Multi-Year Reporting

7. Multi-Year Detail Report—Apply option to view results by two Selected Views

The Multi-Year Detail report tab provides all transactions types at the lowest level of transaction detail, including key identifiers for tracing activities back to the source system, such as Journal ID, Document ID, Journal Posted Date, Purchase Order ID, etc. Use this tab to reconcile transactions after the close of each month, or to view selected transactions using the filters at the top.

Select View offers two data table view options:
- Default view
- Expanded adds the CF1, CF2 and Program codes to include the full chartstring

The Multi-Year Detail Prompts are specific to this reporting tab and any selections will not be carried over to other tabs of the Multi-Year Reporting dashboard.

Data table values are not drillable, as data is at the lowest, transactional level.

The Journal ID prompt is case-sensitive.
8. Multi-Year Detail Report—Next option to access additional prompts

Select View offers two data table view options:
- **Default view**
- **Expanded view** adds CF1, CF2 and Program codes

Right click in data table -> Include columns to display a list of includable fields to customize report. Review the [wiki](#) for a complete list of includable columns.