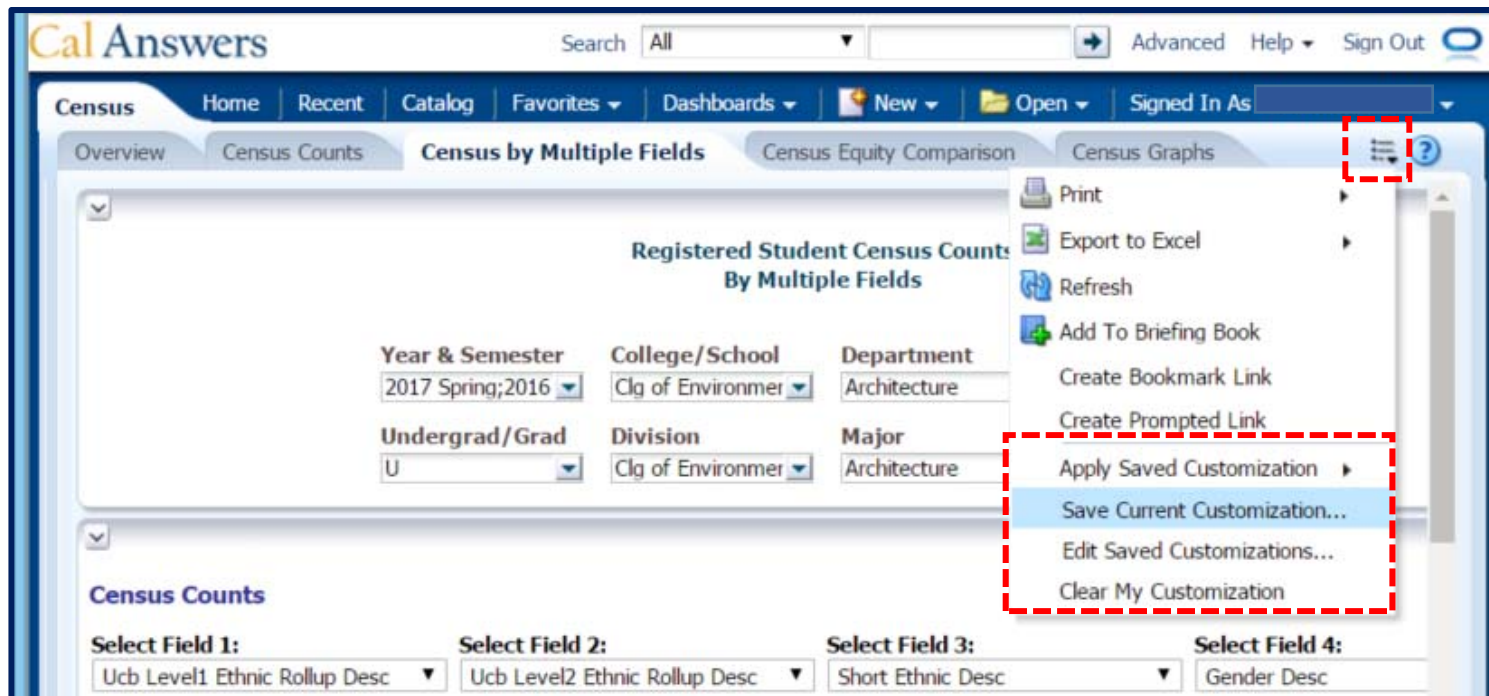


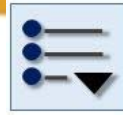


Cal Answers allow you to save your filtered and formatted dashboard reports as customized views that you can apply and revise as needed &/or set as the default opening view for that page. Once saved, you can apply, edit, clear and set your customization as your default view for the dashboard.

This job aid will walk you through the steps of:


- [Creating a Saved Customization & Setting a Saved Customization as the Default View](#)
- [Applying a Saved Customization](#)
- [Clearing an Applied Customization](#)
- [Editing & Deleting Your Saved Customizations](#)
- [Sharing a Saved Customization](#)

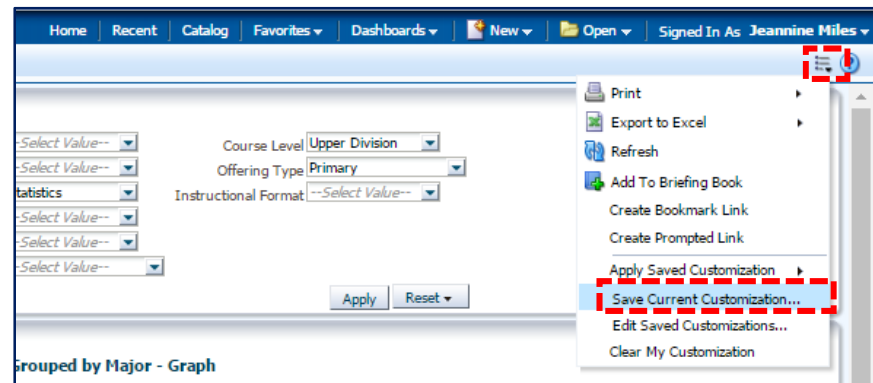




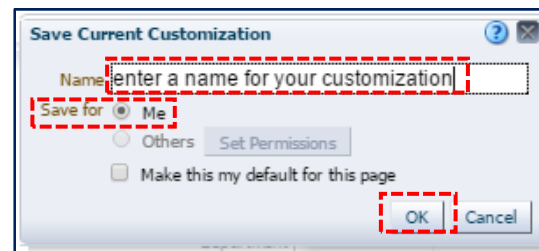
## Creating a Saved Customization

The following steps explain how to create a **Saved Customization** of a dashboard view you would like to make available for future use.

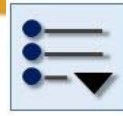
1. Navigate to the Cal Answers dashboard you would like to use to create a Saved Customization. Apply the necessary filters and modify the data table layout (sort/move/exclude columns, etc.) as needed to format your page.
2. Click the **Page Options drop down**  icon from the upper right-hand corner of the dashboard and select **Save Current Customization** from the options displayed.



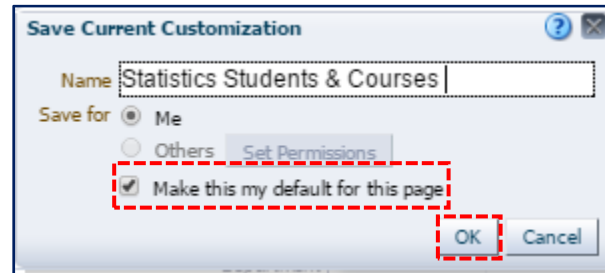
3. The **Save Current Customization** dialog box appears. Enter a **Name** for your Saved Customization. The **Save for** option defaults to **Me**. Click **OK**.




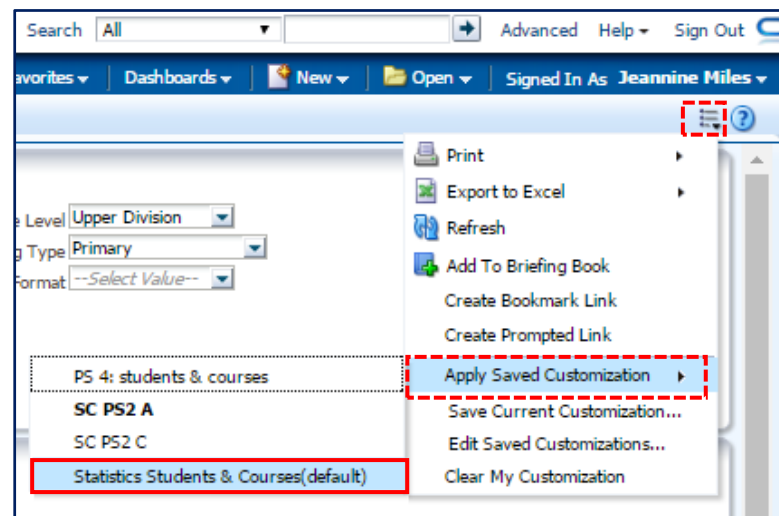
**Saved Customizations** created in the Cal Answers General Ledger Reporting (GLR) dashboard will display in the list of Saved Customizations in the Financial Management Report (FMR) dashboards and vice versa. This only occurs with these two dashboards as the report is built on the same subject area. To avoid confusion, include the Dashboard (GL or FMR) and Report tab (i.e., S-summary, D-detail, BAP-by accounting period) as a prefix in when creating the customized name.

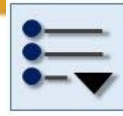


- Check the box for **Make this my default for this page**, if you would like to set this dashboard page to always open to this Saved Customization. Click **OK**.




- From the dashboard page, click the **Page Options icon**  and select **Apply Saved Customization** from the drop down menu options to view a list of saved customizations created for this specific dashboard. Note that the name for the default customization has **(default)** at the end. Customizations are dashboard specific so only those created on the current dashboard will be displayed.

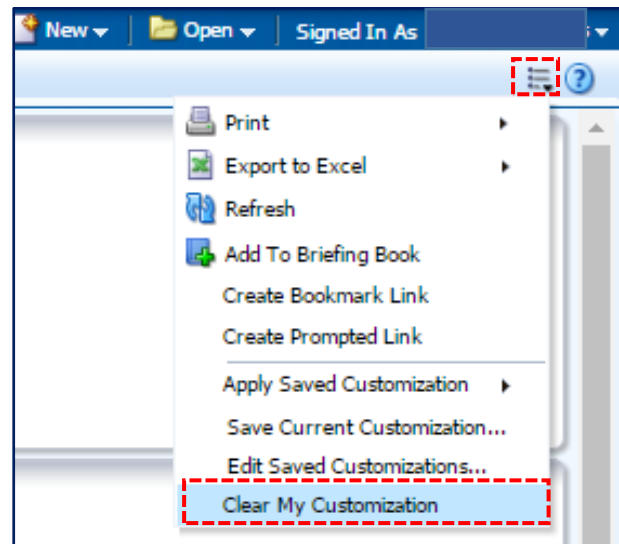


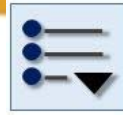


## Clearing an Applied Customization

You can clear a Saved Customization view from a dashboard page to return it to the Cal Answers default or to the customized view you assigned as the default. The following steps explain how to remove the customized view and restore the dashboard to the default view.


1. Click the **Page Options icon**  and select **Clear My Customization** from the drop down menu options displayed. The dashboard is refreshed with the current default view.

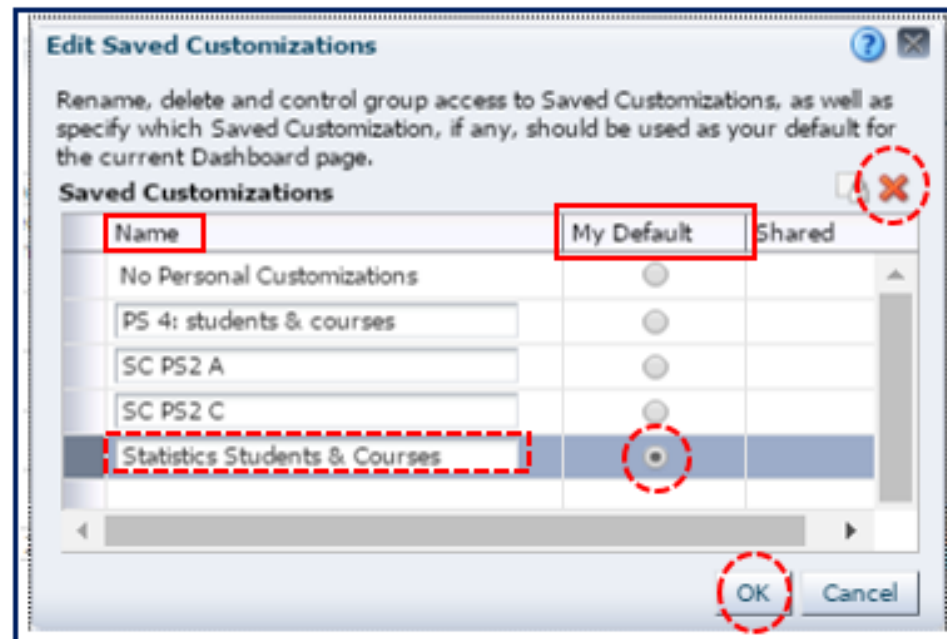
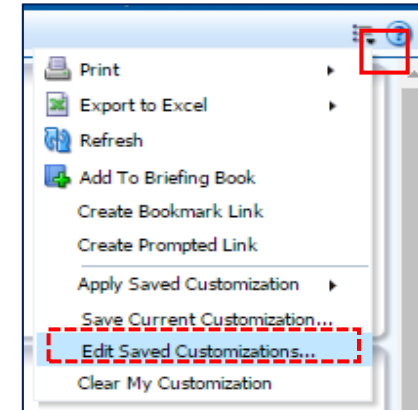


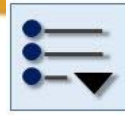


## Editing and Deleting a Saved Customizations

Saved Customizations can be edited and deleted as needed.

1. Click the **Page Options icon**  and select **Edit Saved Customization** from the drop down menu options displayed.
  
2. From the **Edit Saved Customization** dialog box there are several options:
  - a. Renaming a Saved Customization. Click in the **Name** field and edit as needed.
  - b. Assigning a Save Customization Select **My Default** to assign the saved customization to display the view upon opening or clearing a customization. Only one default is allowed per dashboard.
  - c. Select the **Saved Customization** row and click the red **X** from the upper right-hand corner to **delete** the customization.
  - d. Reset the dashboard default to **No Personal Customizations** by selecting **My Default**.
  
3. Click **OK** to save your actions.





## Sharing a Saved Customization

To share your **Saved Customization**, you can apply the customized view and then create a bookmark link. When shared with a colleague with Cal Answers access they can open and view your filtered and formatted dashboard page. Check out our [Creating Bookmark Links](#) job aid for step-by-step instructions on working with Bookmark Links.



Check out the [Page Options Menu Customizations](#) video to see a demonstration of working with Saved Customizations.

## Additional Help

If you have questions or feedback for the Cal Answers Team on working with Saved Customizations or other functionality, please contact Campus Shared Services IT Application Support at [calanswers-help@berkeley.edu](mailto:calanswers-help@berkeley.edu) or 664-9000 (ext. - option 1, then option 2). Application Support is available Monday through Friday, 8:00 am – 5:00 pm.