**Financial Administrative Dashboards (FAD) Quick Guide**

**Accessing FAD reports**

1. Be on the “Eduroam” network, a wired connection on campus, or[Log on to the VPN](https://wiki.umbc.edu/display/faq/Getting%2BConnected%2Bwith%2Bthe%2BUMBC%2BGlobalProtect%2BVPN)
2. Sign into to [my.umbc.edu](http://my.umbc.edu/)
3. Click the “Guide” tab at the top of page
4. Under “Administrative Systems” click “Financial Administrative Dashboards”

**General Knowledge**

The data is a day old. All data in the Financial Administrative Dashboards are loaded from PeopleSoft the day prior.

If the filters on the reports get out of sync, you should refresh the page and try again.

Make sure to locate the scroll bar to see all the data on the dashboard.

**Saving your Filters as a View**

After choosing all your filters, you can save them as a view so you do not have to enter them each time you log on. To save a custom view after you enter your filters:

1. Click the “View” icon  at the top left of the page
2. In the pop-up, name your view.
3. You can also check the box to make it your default view.
4. Or you can click the same icon the next time you log in and select which view you want.

**Downloading the Detail Data into Excel**

Reports can be downloaded into MS Excel format by doing the following:

1. Click into the table you wish to download to Excel

2. Click this icon  and “Data”
3. Click the download icon in the pop-up.

The data file will then be downloaded to your computer.

**Downloading A Summary Dashboard into Excel**

1. Click into the table you wish to download to Excel

2. Click this icon  and “Crosstab”

3. Select “Excel” and “Download” in the pop-up.

The Excel file will then be downloaded to your computer.

**Sharing the View**

If you would like to share the view of the dashboard you are viewing with the same selections you are using, you can by:

1. Click the Share button  on the top right
2. In the pop-up, you can either enter the person’s email or copy the link and email it to them.

**What workbook should I use?**

The Summary Workbook is the most interactive workbook where you can see Budget v Actuals and drill down to details.

However, the Detail Workbook has additional filters making it the better choice for reconciling or searching for a specific transaction.

**Additional Help**

On each dashboard, the question icon will take you to the UMBC FAQ wiki for that dashboard.

Be sure to check out the my.umbc.edu Trainings group for additional training opportunities.