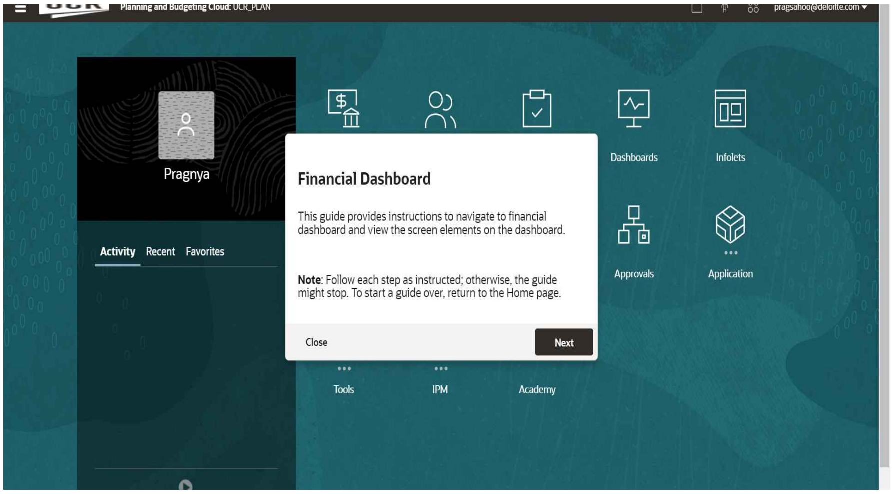
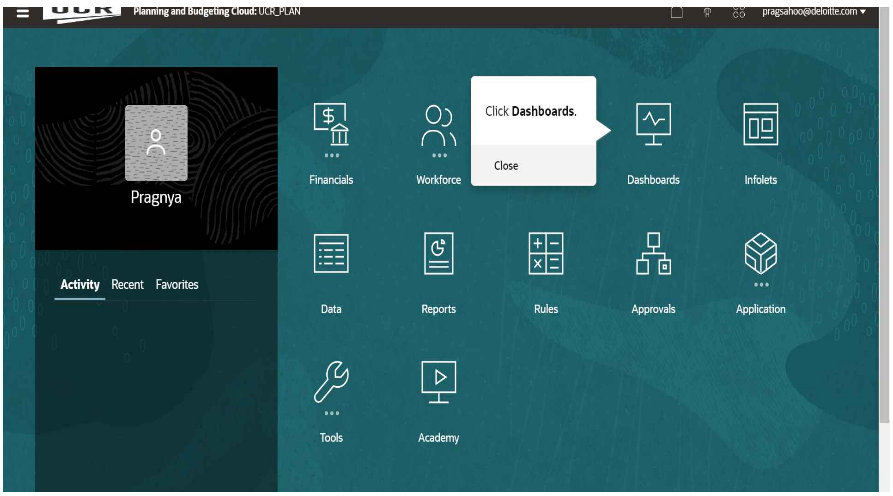
Financial Dashboard

Step 1



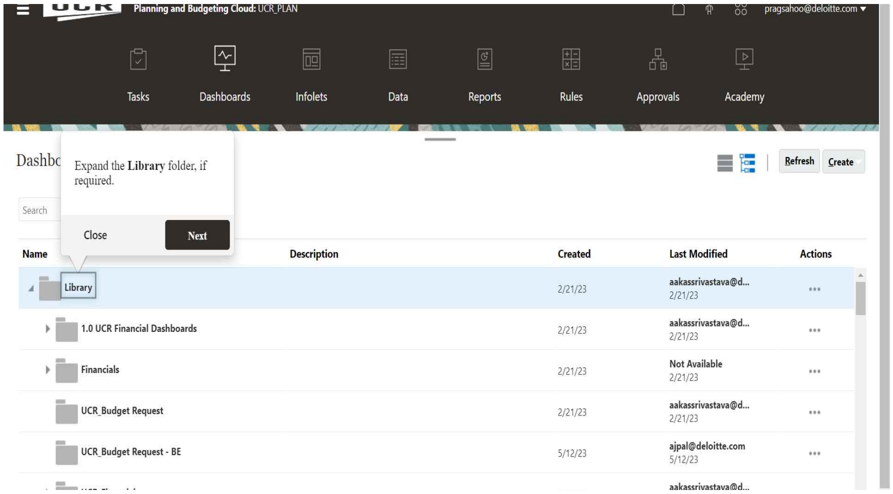
Financial Dashboard
This guide provides instructions to navigate to financial dashboard and view the screen elements on the dashboard.
Note: Follow each step as instructed; otherwise, the guide might stop. To start a guide over, return to the Home page.

Step 2



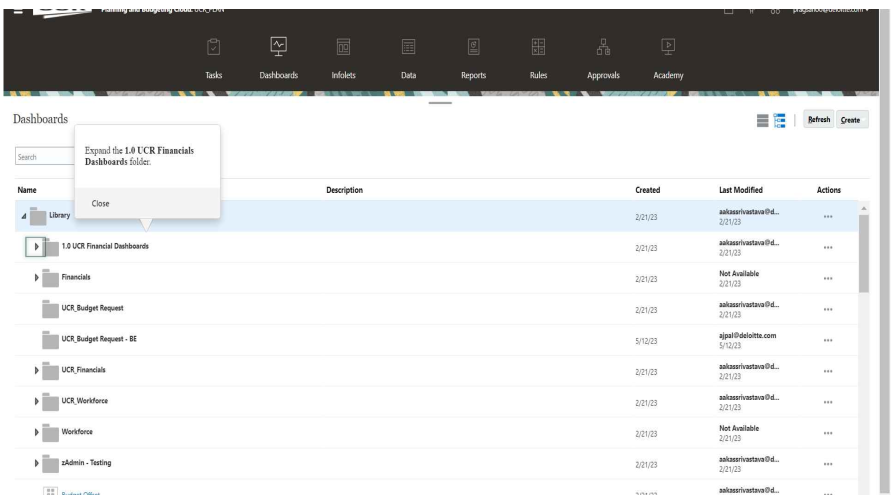
Click **Dashboards**.

Step 3



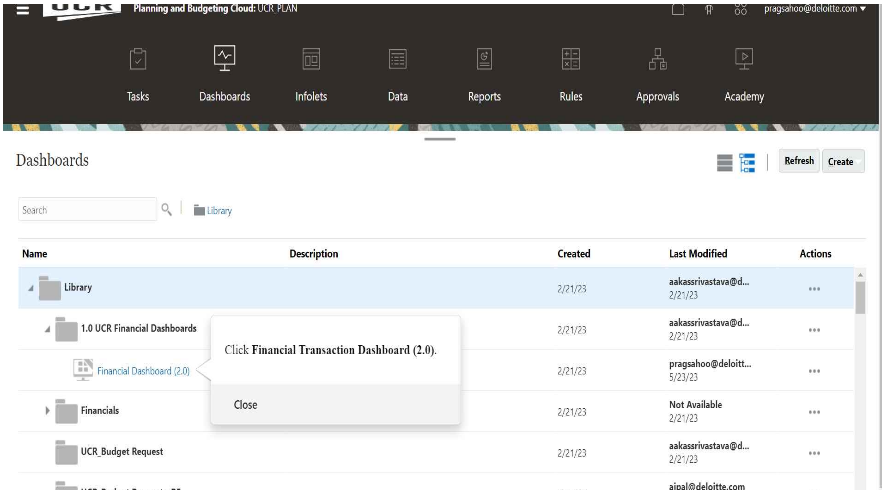
Expand the **Library** folder, if required.

Step 4



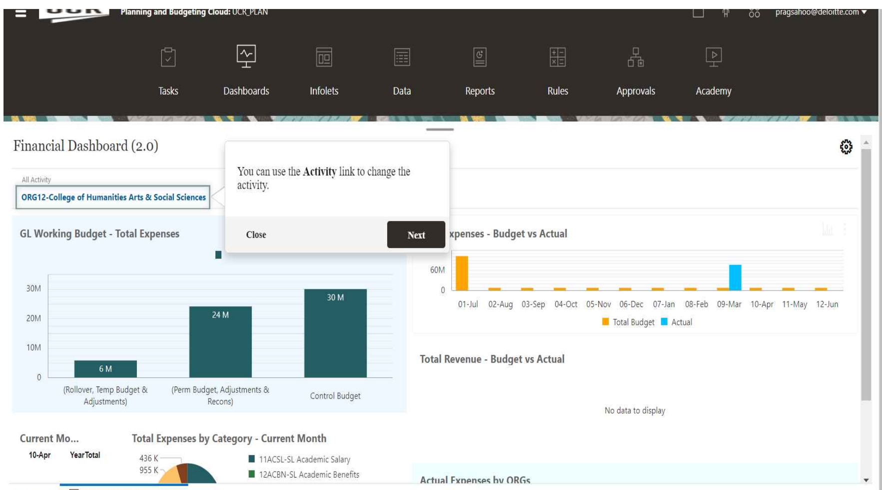
Expand the **1.0 UCR Financials Dashboards** folder.

Step 5



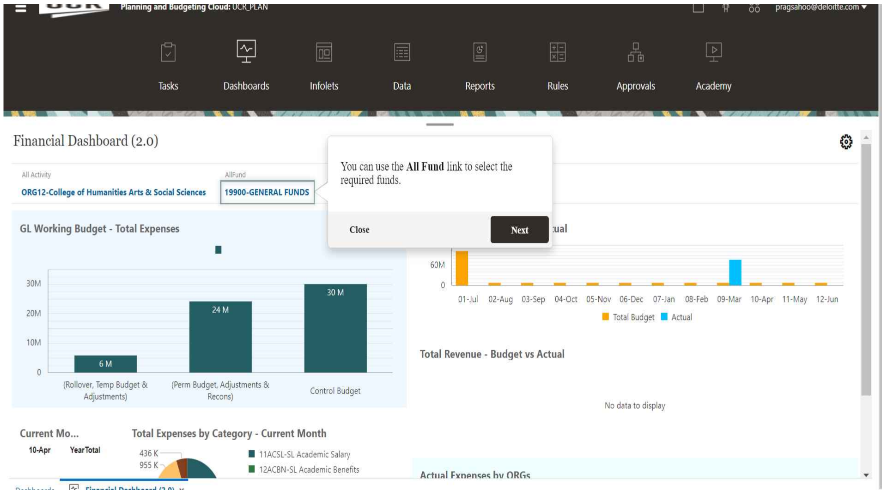
Click **Financial Transaction Dashboard (2.0)**.

Step 6



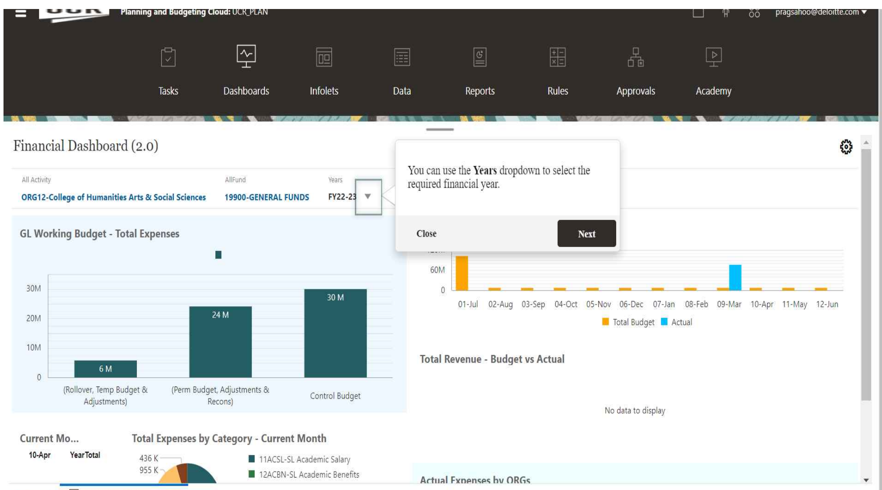
You can use the **Activity** link to change the activity.

Step 7



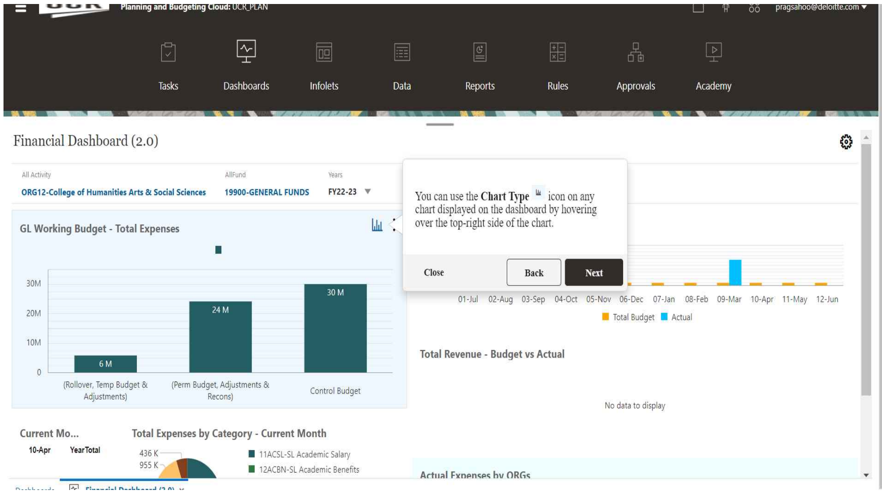
You can use the **All Fund** link to select the required funds.

Step 8



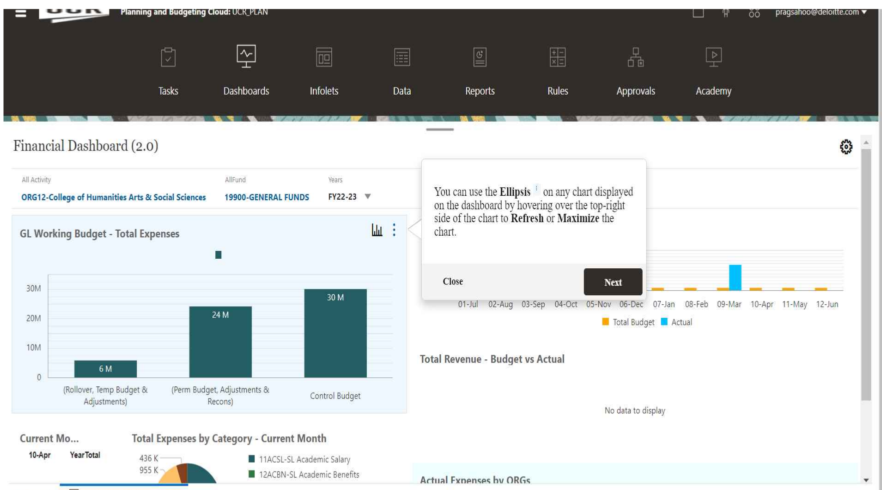
You can use the **Years** dropdown to select the required financial year.

Step 9



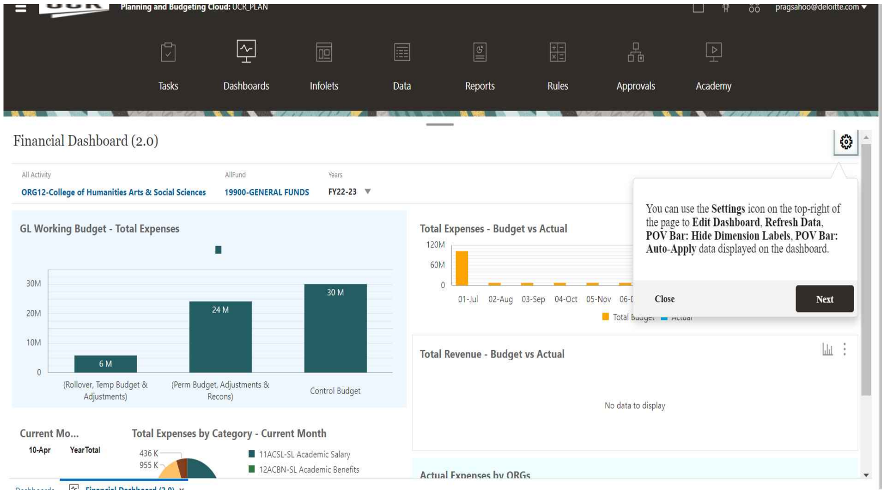
You can use the **Chart Type** icon on any chart displayed on the dashboard by hovering over the top-right side of the chart.

Step 10



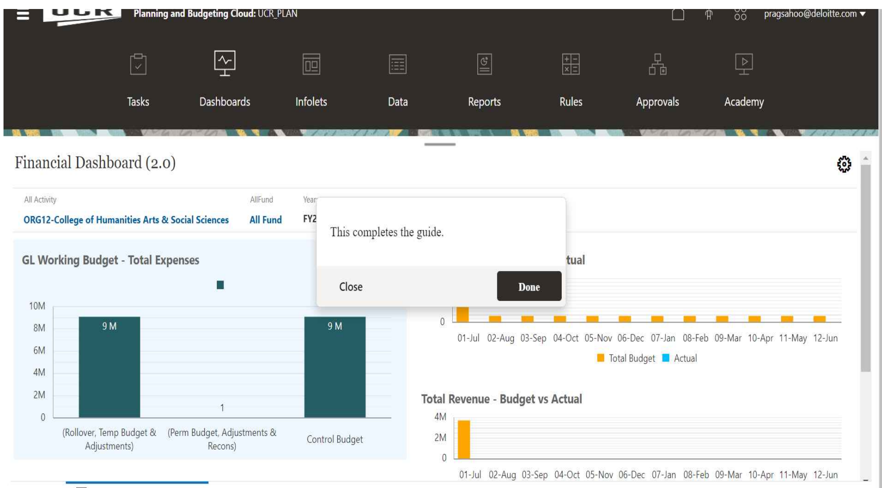
You can use the **Ellipsis** ⋮ on any chart displayed on the dashboard by hovering over the top-right side of the chart to **Refresh** or **Maximize** the chart.

Step 11



You can use the **Settings** icon on the top-right of the page to **Edit Dashboard**, **Refresh Data**, **POV Bar: Hide Dimension Labels**, **POV Bar: Auto-Apply** data displayed on the dashboard.

Step 12



This completes the guide.
