# Running a Campus Transaction Dashboard Report

**Purpose:** Dashboard reports allow the user to quickly search for transactions to determine payment and posting status by funding source data, supplier, and accounting dates.

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<th>Action</th>
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| 1.   | Users may access **Campus Transactions Dashboard** by clicking the icon on the **Home Page** or via the **Navigator** menu.  
To navigate to the **Home Page**, click the house icon in the top right hand corner. |
| 2.   | From the OFC **Home Page**, click the **Reports and Analytics** icon. |
| 3.   | Select the book icon in the top left corner, under Contents to open reporting.  
**Note:** A new window will open. |
| 4.   | Navigate to Shared Folders / Custom / Campus Reports by using the chevrons to open each folder. **Campus Reports** should be highlighted as indicated below. |
| 5.   | Ensure Type is “All” and Select **Open** under **Campus Transactions Dashboard**. |
| 6.   | Select appropriate tab. |

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| 7.   | **Payables Query:** Search and view invoiced transactions, identify payment status, and transactions details.  
   **Segment Values:** Leave blank or enter or search for specific values.  
   **Supplier or Party Name:** Leave blank or search for Supplier/Party to ensure accuracy.  
   **Invoice Number:** Leave blank or enter invoice number.  
   **Payment Status:** Leave blank or select from the drop down menu.  
   **Pay Group:** Leave blank or select from the drop down menu. Note: You may select P-CARD or Internal Payments to identify those specific types of transactions.  
   **Accounting Dates:** Enter date parameters for the search. |
| 8.   | **Payments Query:** Search and view payment information for paid invoices.  
   **Invoice Number:** Leave blank or enter transaction number.  
   **Supplier/Payee:** Leave blank or search for Supplier/Party to ensure accuracy.  
   **Payment Method:** Leave blank or search for a specific payment method.  
   **Payment Date Between:** Enter date parameters for the search. |
| 9.   | **Deposits Query:** Search and view deposits that have been submitted and posted to the general ledger.  
   **Segment Values:** Leave blank or enter or search for specific values.  
   **Deposit Type:** Leave blank or select from the drop down menu.  
   **Deposit Preparer Group:** Leave blank or enter or select from the drop down menu.  
   **Accounting Date Between:** Enter date parameters for the search. |
## Journal Entries Query

**Action**: Allows users to review journal entries, payroll corrections, and interdepartmental charges that have been submitted and posted to the general ledger.

- **Segment Values**: Leave blank or enter or search for specific values.
- **Confirmation Number**: Enter number provided by administrative accounting upon confirmation of journal entry completion.
- **Accounting Date Between**: Enter date parameters for the search.

### Budget Transfers Query

**Action**: Search and view budget transfers that have been submitted and posted to the general ledger.

- **Department**: Leave blank or enter a specific department segment value.
- **Cost Center**: Leave blank or enter a specific cost center segment value.
- **Account**: Leave blank or enter a specific account segment value.
- **Accounting Date Between**: Enter date parameters for the search.

Once results are reflected, you may select the fund segment value from the drop down to further refine your search.

**Note**: Ensure that you enter the start and end dates of the fiscal year to ensure a retrieval of year to date budget total.

## Budget Details Query

**Action**: Search and view budget transfer details to include journal and line descriptions, posting, and created by that have been submitted and posted to the general ledger.

- **Department**: Leave blank or enter a specific department segment value.
- **Cost Center**: Leave blank or enter a specific cost center segment value.
- **Account**: Leave blank or enter a specific account segment value.
- **Budget Transaction Type**: Leave blank or select the budget transfer type(s).
- **Accounting Date Between**: Enter date parameters for the search.
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| 13.  | **Expense Reports Query**: Search and view expense reports, identify status from saved to withdrawn or paid, and additional transaction details.  
*Segment Values*: Leave blank or enter or search for specific values.  
*Employee Name*: Leave blank or enter or search for a specific name.  
*Expense Report Number*: Leave blank or enter or search for specific values.  
*Report Status*: Leave blank or search for a specific status.  
*Accounting Date*: Leave blank or enter date parameters for the search.  |
| 14.  | **Requisitions Query**: Search and view requisitions, identify status from saved to withdrawn or paid, and additional transaction details.  
*Segment Values*: Leave blank or enter or search for specific values.  
*Supplier*: Leave blank or search for Supplier/Party to ensure accuracy.  
*Requisition*: Leave blank or enter or search Requisition Number.  
*Preparer*: Leave blank or enter or search for a specific name.  
*Requisition Status*: Leave blank or enter or search for a specific status.  
*Accounting Date*: Leave blank or enter date parameters for the search.  |
| 15.  | **Purchase Orders Query**: Search and view purchase orders, identify status from pending to closed or cancelled, and additional transaction details.  
*Segment Values*: Leave blank or enter or search for specific values.  
*Supplier*: Leave blank or search for Supplier/Party to ensure accuracy.  
*Requisition*: Leave blank or enter or search Requisition Number.  
*Order*: Leave blank or enter Purchase Order Number.  
*PO Status*: Leave blank or enter or search for a specific status.  
*Requester Name*: Leave blank or enter or search for a specific name.  
*PO Create Date*: Leave blank or enter date parameters for the search.  
*Category Name*: Leave blank or search for a specific category.  |
### Step 16

**Requisition Lifecycle Query:** Search and view requisition, purchase order, and invoices to track encumbrance and expense through the lifecycle of a requisition.

- **Segment Values:** Leave blank or enter specific value(s).
- **Supplier:** Leave blank or search for Supplier to ensure accuracy.
- **Requisition Number:** Leave blank or enter Requisition Number.
- **PO Number:** Leave blank or enter Purchase Order Number.
- **Encumbered?** Leave on All to pull all transactions or change to Yes or No to view only transactions with an outstanding encumbrance or not.
- **Requested by:** Leave blank or search for a Requester Name.
- **Buyer:** Leave blank or search for a Buyer Name.

<table>
<thead>
<tr>
<th>Fund</th>
<th>Account</th>
<th>Supplemental</th>
<th>Requisition Number</th>
<th>Supplier</th>
<th>Encumbered?</th>
<th>Requested by</th>
<th>Buyer</th>
</tr>
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<tbody>
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### Step 17

**Search Tips:** Select the operator Starts, Contains, Ends, or is Like. Uncheck Match Case Highlight value(s) and add and remove values using the > and <.

### Step 18

Dashboard Reports may be exported to Excel by selecting in the upper right hand corner, **Export to Excel**, and choosing either **Current Page** or **Entire Dashboard**.

*Note:* Requisition Lifecycle may be exported using the same icon just above the results and under the **Apply** button.
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<tbody>
<tr>
<td>19.</td>
<td>Search Parameters may be saved for Dashboard Reports by entering search values, selecting in the upper right hand corner, select <strong>Save Current Customization</strong>, enter a <strong>Name</strong> for the search, and click <strong>OK</strong>.</td>
</tr>
<tr>
<td>20.</td>
<td><strong>End of Procedure.</strong></td>
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