# 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.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Users may access <strong>Campus Transactions Dashboard</strong> by clicking the icon on the <strong>Home Page</strong> or via the <strong>Navigator</strong> menu. To navigate to the <strong>Home Page</strong>, click the house icon in the top right hand corner.</td>
</tr>
<tr>
<td>2.</td>
<td>From the OFC <strong>Home Page</strong>, click the <strong>Reports and Analytics</strong> icon.</td>
</tr>
<tr>
<td>3.</td>
<td>Select the book icon in the top left corner, under Contents to open reporting. <strong>Note:</strong> A new window will open.</td>
</tr>
<tr>
<td>4.</td>
<td>Navigate to Shared Folders / Custom / Campus Reports by using the chevrons to open each folder. <strong>Campus Reports</strong> should be highlighted as indicated below.</td>
</tr>
<tr>
<td>5.</td>
<td>Ensure Type is “All” and Select <strong>Open</strong> under <strong>Campus Transactions Dashboard</strong>.</td>
</tr>
<tr>
<td>6.</td>
<td>Select appropriate tab.</td>
</tr>
</tbody>
</table>
### Step 7. Payables Query

**Action:** 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.
- **Accounting Dates:** Enter date parameters for the search.

![Payables Query Screen](image1)

### Step 8. Payments Query

**Action:** Search and view payment information for paid invoices.

- **Invoice Number:** Leave blank or enter invoice number.
- **Supplier/Payee:** Leave blank or search for Supplier/Party to ensure accuracy.
- **Payment Date Between:** Enter date parameters for the search.

![Payments Query Screen](image2)

### Step 9. Deposits Query

**Action:** 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.

![Deposits Query Screen](image3)
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 10.  | **Journal Entries Query**: 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. |
| 11.  | **Budget Transfers Query**: 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. |
| 12.  | **Budget Details Query**: 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. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 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.  
  **Note**: Requisition Types Goods vs Fixed Price Services |
| 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. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 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. |
| 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 <. |
| 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. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<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>
</tr>
</tbody>
</table>