## 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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| 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. |
<p>| 4.   | 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. |
| 5.   | Ensure Type is “All” and Select <strong>Open</strong> under <strong>Campus Transactions Dashboard</strong>. |
| 6.   | Select appropriate tab. |</p>
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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.  
*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 invoice number.  
*Supplier/Payee*: Leave blank or search for Supplier/Party to ensure accuracy.  
*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. |
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| 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.  
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. |
| 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. |
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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. |
### Step 16

**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 <.

![Select Values](image1)

### Step 17

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.

![Export Options](image2)

### Step 18

Search Parameters may be saved for Dashboard Reports by entering search values, selecting 🔄 in the upper right hand corner, select **Save Current Customization**, enter a **Name** for the search, and click OK.

![Save Current Customization](image3)

### Step 19

**End of Procedure.**