# 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. |
### Step 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.

### Step 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

### Step 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.
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| 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. |
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<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>
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![](image)

| 20.  | **End of Procedure.** |