# 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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<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.  &lt;br&gt; To access the <strong>Home Page</strong> in OFC, click the house icon at the top of the screen.</td>
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<tr>
<td>2.</td>
<td>From the OFC <strong>Home Page</strong>, click the <strong>Reports and Analytics</strong> icon.</td>
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<tr>
<td>3.</td>
<td>Click <img src="image" alt="Browse Catalog" /> in the upper right hand corner to open reporting.  &lt;br&gt; <strong>Note:</strong> A new window will open.</td>
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<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>
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<td>5.</td>
<td>Ensure Type is “All” and Select <strong>Open</strong> under <strong>Campus Transactions Dashboard</strong>.</td>
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<td>6.</td>
<td>Select appropriate tab.</td>
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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.  
       *Party Name (Supplier)*: Leave blank or search for Supplier/Party to ensure accuracy.  
       *Transaction (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.  
       *Party Name (Supplier)*: Leave blank or search for Supplier/Party to ensure accuracy.  
       *Transaction (Invoice) Number*: Leave blank or enter transaction number.  
       *Payment Method*: Leave blank or search for a specific payment method.  
       *Check Number*: Leave blank or search for a specific check number.  
       *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.  
       *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.  
* **Segment Values**: Leave blank or enter or search for specific values.  
* **Accounting Year**: Enter a specific fiscal year.  
* **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. |

| 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.  
* **Segment Values**: Leave blank or enter or search for specific values.  
* **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.  
   **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.  
   *Category Name*: Leave blank or search for a specific category. |
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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 **Export to Excel** in the upper right hand corner, **Export to Excel**, and choosing **Current Page**.  
  *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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<tr>
<td>20.</td>
<td><strong>End of Procedure.</strong></td>
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