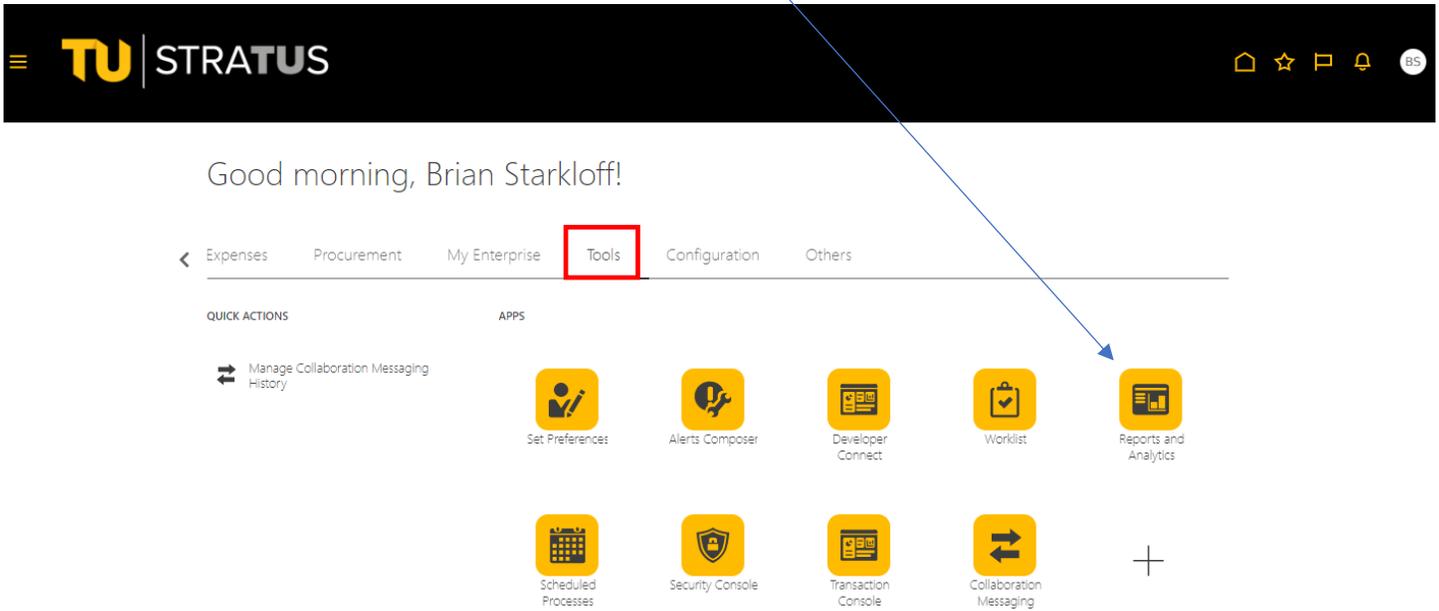


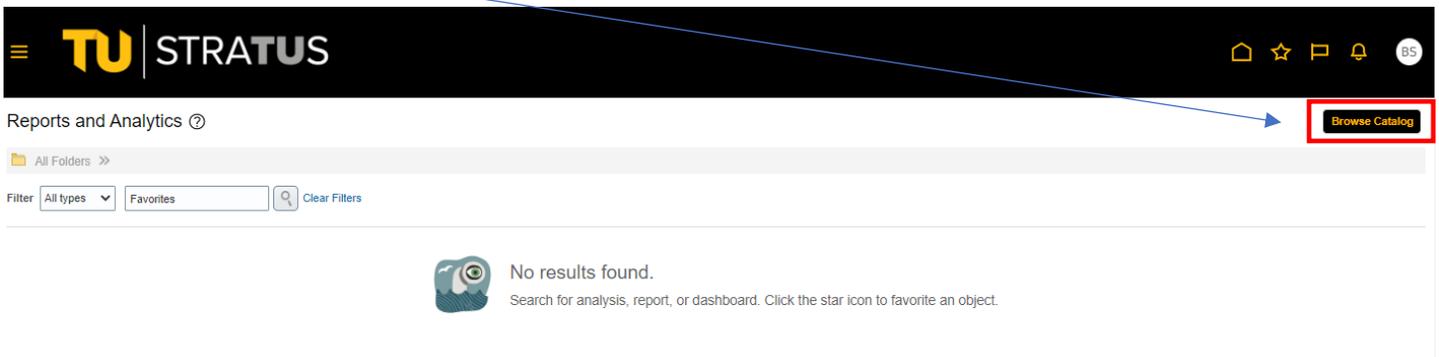
How to Run the Transactional Dashboard Report

This TU_BC_Transactional_Reports_Dashboard report takes the existing transactional detail reports and gives you a way to run them all at once, similar to the PeopleSoft DAT report. This Dashboard will show the: revenue and expense transactions, budget adjustments, invoice expense list, ProCard expense report completed, travel expense report completed, and requisitions and purchase order listing.

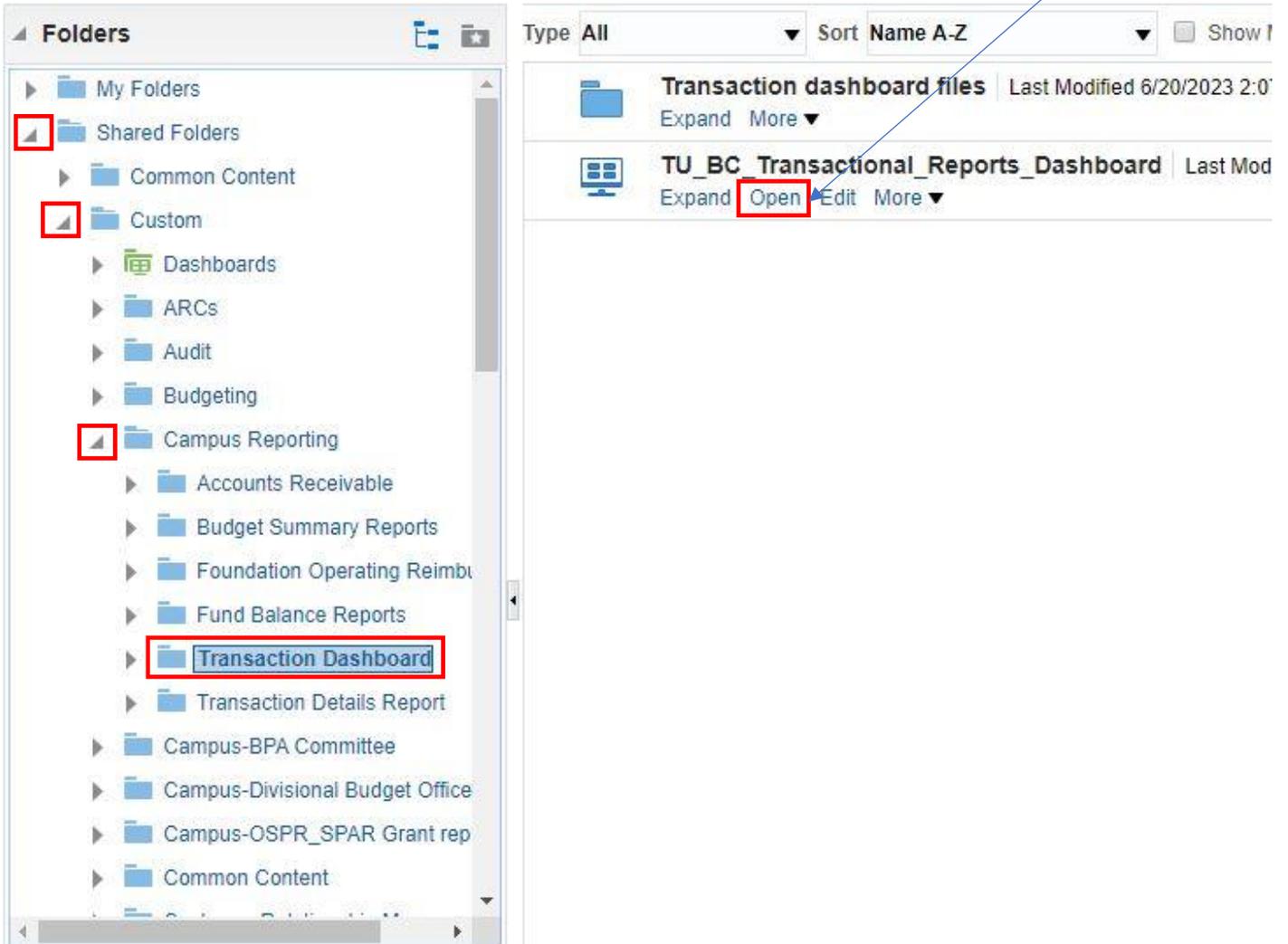
Navigate to Tools, and select the tile for Reports and Analytics



Select Browse Catalog



Under Folders, select Shared Folders > Custom > Campus Reporting. Click on Transaction Dashboard, then Open on the right side of the screen.



When prompted, verify/update the accounting dates and budget year and enter your cost center, budget cost center value, and/or PO cost center code. Click Apply

The image shows the 'TU_BC Transactional_Reports_Dashboard' form. The top navigation bar includes 'Alerts!', 'Home', 'Catalog', 'Favorites', and 'Dashboa'. Below the navigation bar, there are several tabs: 'Prompts', 'TU_BC_DAT_Rev_Expense', 'TU_BC_Budget_Adjustments', 'TU_BC_DAT_Invoice_Expense_List', 'TU_BC_DAT_Pcard_Expense_Report_Completed', 'TU_BC_DAT_Travel_Exp_Report', and 'TU_BC_REQ_PO_Listing'. The main form area is titled 'Page 1' and contains the following fields: 'Accounting Date' (Between 07/01/2022 and 06/30/2023), 'Budget Year' (2023), 'PO Budget Date' (Between 07/01/2022 and 06/30/2023), 'Cost Center' (12830), 'Budget Cost Center Value' (12830), and 'PO Cost Center Code' (12830). Red boxes highlight the 'Cost Center', 'Budget Cost Center Value', and 'PO Cost Center Code' fields. At the bottom right, there are 'Apply' and 'Reset' buttons. A blue arrow points from the text above to the 'Apply' button.

From here click on any of the headings at the top to view information for that report

The screenshot shows a dashboard with a navigation bar at the top containing the following prompts: **TU_BC_DAT_Rev_Expense**, TU_BC_Budget_Adjustments, TU_BC_DAT_Invoice_Expense_List, TU_BC_DAT_Pcard_Expense_Report_Completed, TU_BC_DAT_Travel_Exp_Report, and TU_BC_REQ_PO_Listing. The first prompt is highlighted with a red box. Below the navigation bar is a filter section with fields for Accounting Date, Budget Transaction Date, PO Budget Date, Cost Center, Budget Cost Center Value, and PO Cost Center Code. The filter section includes 'Apply' and 'Reset' buttons.

Here is the view if you click on the first heading, TU_BC_DAT_Rev_Expense

TU_BC_Transactional_Reports_Dashboard

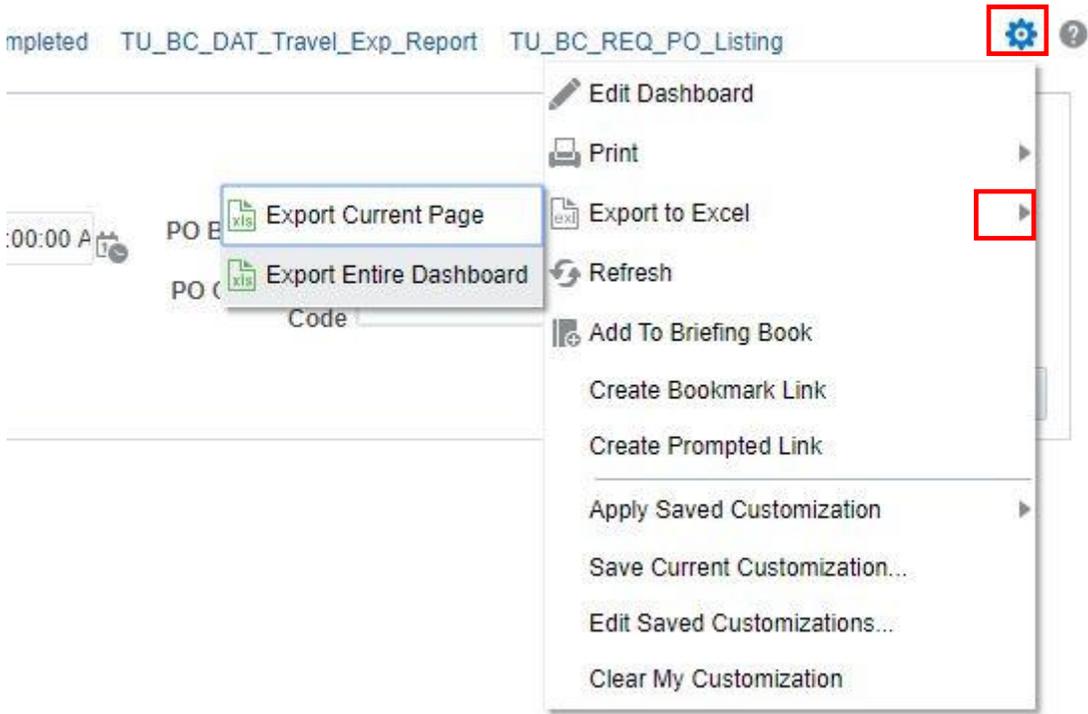
Prompts: **TU_BC_DAT_Rev_Expense** TU_BC_Budget_Adjustments TU_BC_DAT_Invoice_Expense_List TU_BC_DAT_Pcard_Expense_Report_Completed TU_BC_DAT_Travel_Exp_Report TU_BC_REQ_PO_Listing

1_TU_BC_DAT_Rev_Expense_DB

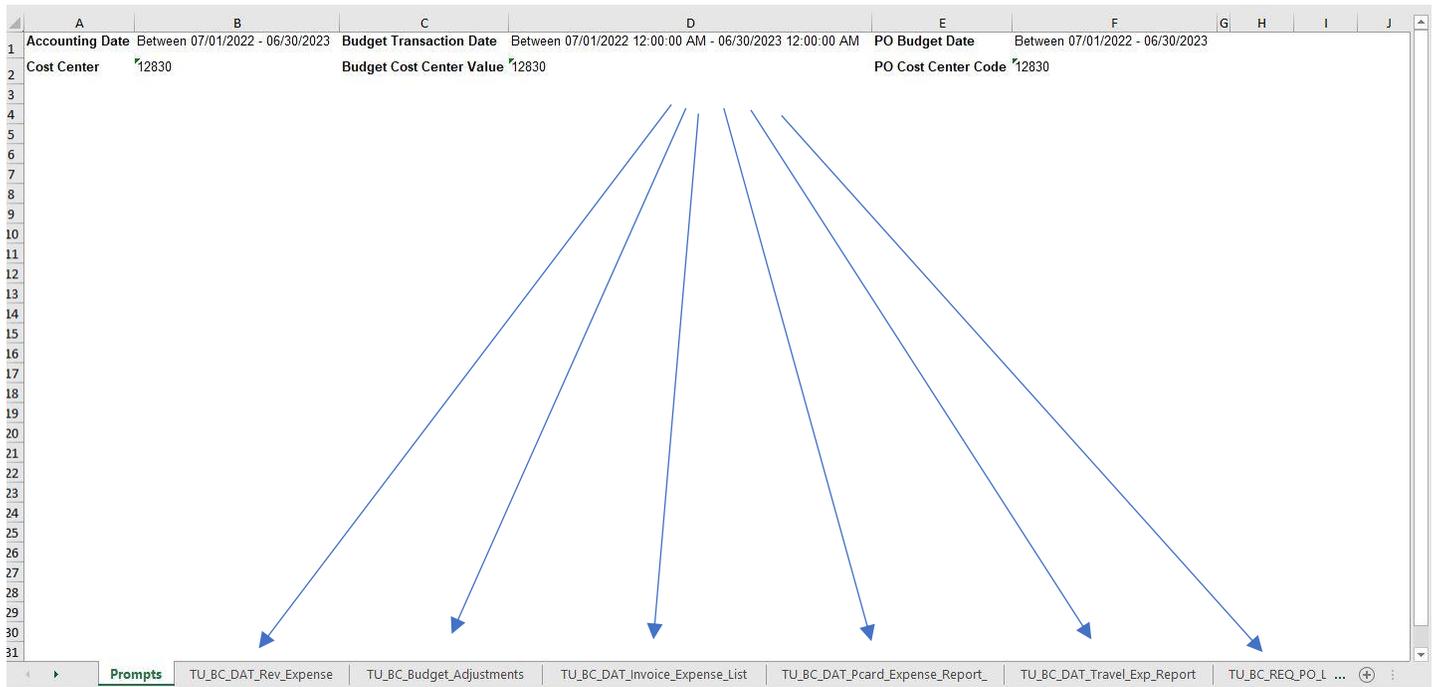
Ledger Name	Accounting Year	Accounting Period Number	Accounting Period Name	Accounting Date	Source	Cost Center	Description	Account	Description	Initiative Segment Value	Objective Segment Value	Journal Total Entered Debit	Journal Total Entered Credit	Journal Name	Journal Line Number	Accounting Sequence Number	Journal Line Description	Journal_Line_Ref1	Jour
TOWSON US	2023	11.0	May-23	5/20/2023	1090	10030	Revenue Music.	401248	Music Fee	00000	000	0.00		SF 05/20/23 SF	764.0	1000013897	Student Financial Interface	102400120000	Musi
TOWSON US	2023	10.0	Apr-23	4/22/2023	1090	10030	Revenue Music.	401248	Music Fee	00000	000	0.00		SF 04/22/23 SF	678.0	1000012621	Student Financial Interface	102400120000	Musi
TOWSON US	2023	8.0	Feb-23	2/18/2023	1090	10030	Revenue Music.	401248	Music Fee	00000	000	0.00	375.00	SF 02/18/23 SF	975.0	1000009347	Student Financial Interface	102400120000	Musi
TOWSON US	2023	8.0	Feb-23	2/11/2023	1090	10030	Revenue Music.	401248	Music Fee	00000	000	0.00	3,150.00	SF 02/11/23 SF	1266.0	1000009027	Student Financial Interface	102400120000	Musi
TOWSON US	2023	8.0	Feb-23	2/4/2023	1090	10030	Revenue Music.	401248	Music Fee	00000	000	0.00	2,950.00	SF 02/04/23 SF	1434.0	1000008643	Student Financial Interface	102400120000	Musi
TOWSON US	2023	7.0	Jan-23	1/28/2023	1090	10030	Revenue Music.	401248	Music Fee	00000	000	0.00	3,450.00	SF 01/28/23 SF	1362.0	1000008385	Student Financial Interface	102400120000	Musi
TOWSON US	2023	7.0	Jan-23	1/21/2023	1090	10030	Revenue Music.	401248	Music Fee	00000	000	1,150.00		SF 01/21/23 SF	1858.0	1000008003	Student Financial Interface	102400120000	Musi
TOWSON US	2023	7.0	Jan-23	1/14/2023	1090	10030	Revenue Music.	401248	Music Fee	00000	000	0.00	2,125.00	SF 01/14/23 SF	909.0	1000007853	Student Financial Interface	102400120000	Musi

You can also click on the settings icon to the right and export to Excel

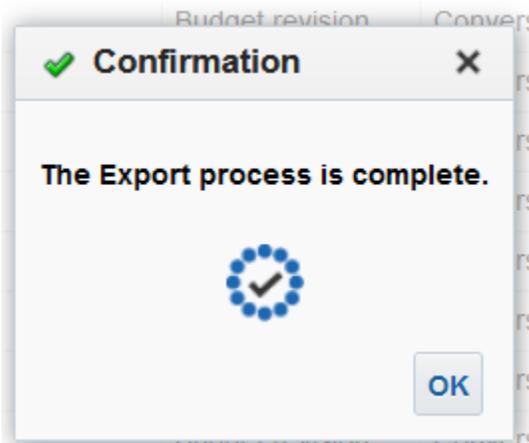
You can chose to export entire dashboard (example) or the current report you are displaying.



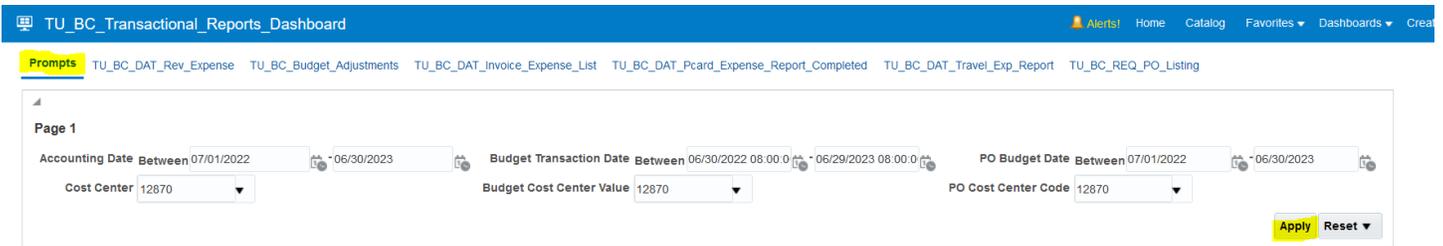
Once you export to Excel you will notice all of the tabs at the bottom of the spreadsheet.



In Stratus an excel export process complete message box will be displayed as seen below. Click OK.



You will be returned to the dashboard report where you can run again by navigating to the prompt tab and enter new criteria and click apply then follow same steps as above.



To return to the report menu, click Catalog in the blue banner.

