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
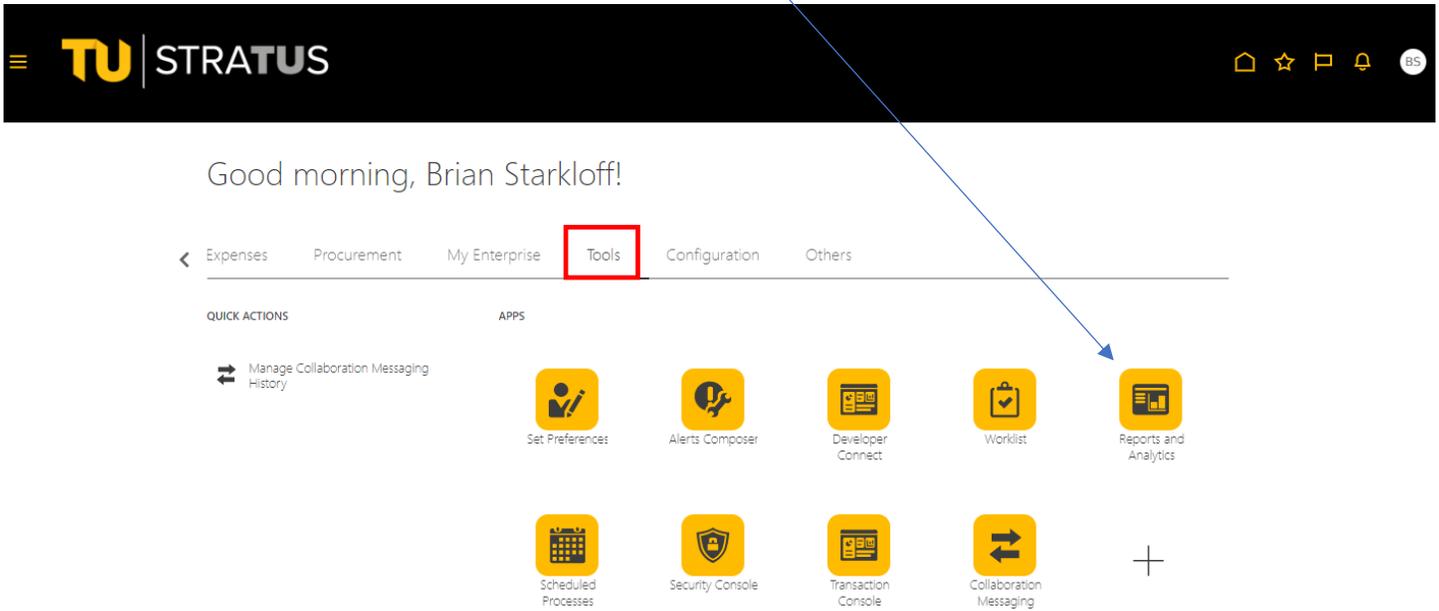
Select Browse Catalog
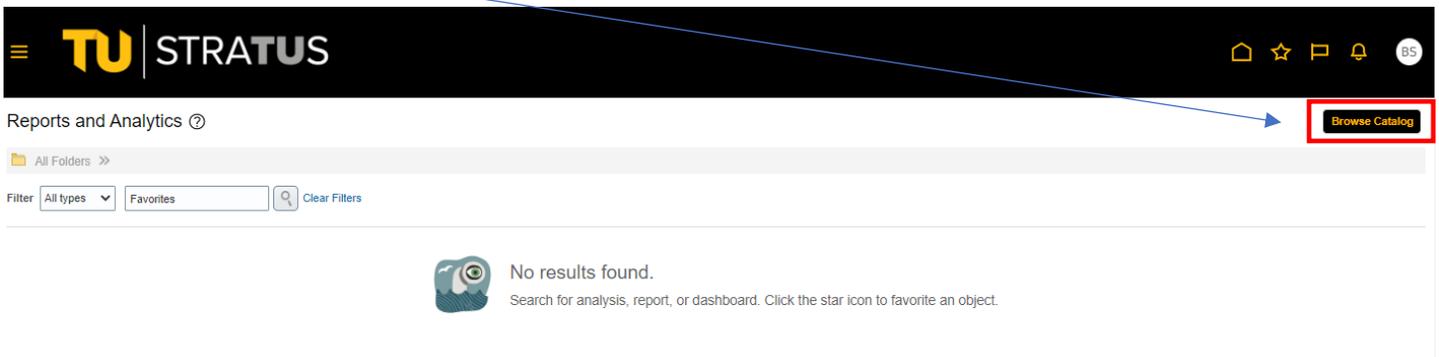
Under Folders, select Shared Folders > Custom > Campus Reporting. Click on Transaction Dashboard, then Open on the right side of the screen.
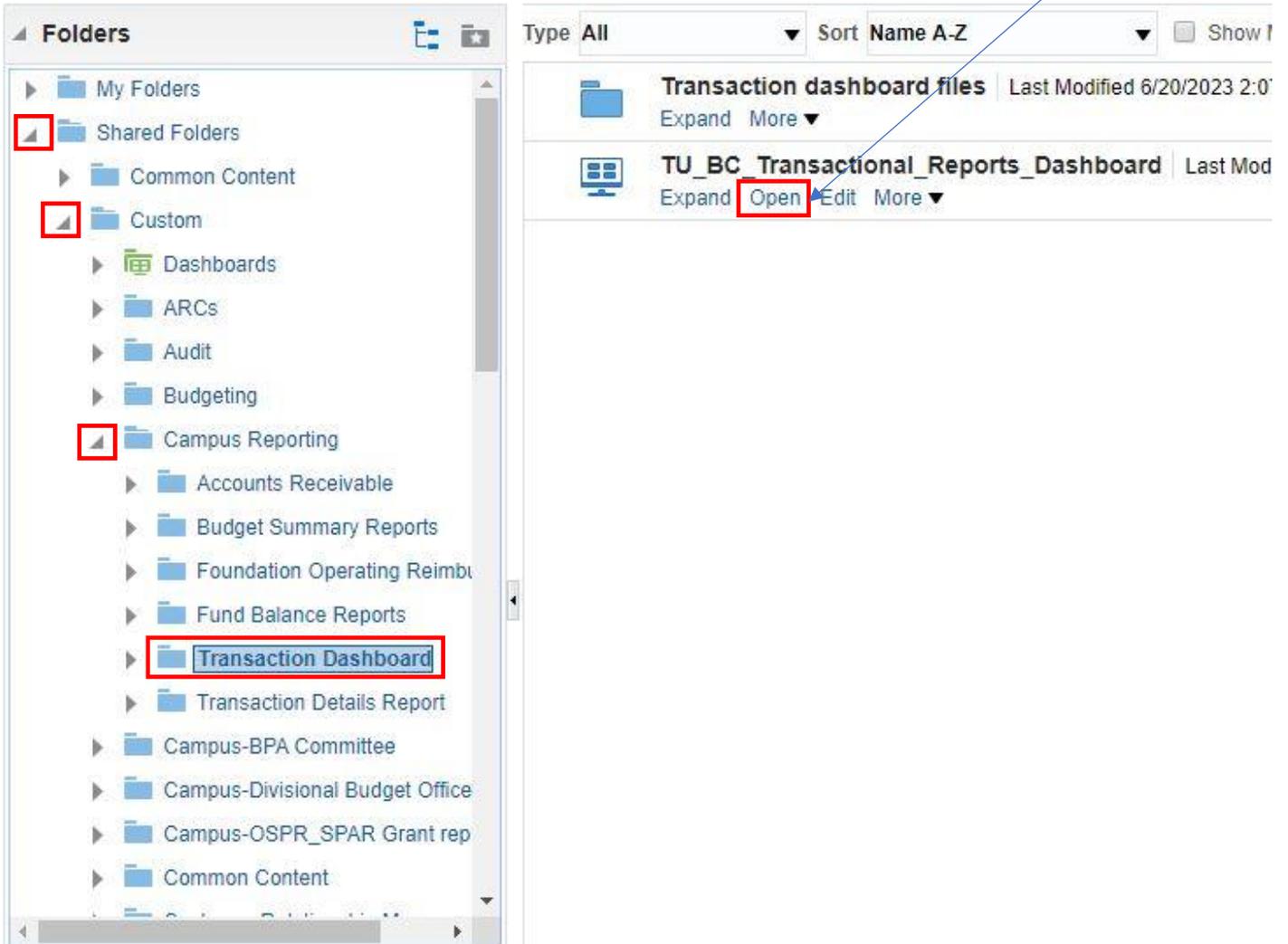
When prompted, verify/update the accounting dates and budget year and enter your cost center, budget cost center value, and/or PO cost center code. Click Apply

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

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

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.
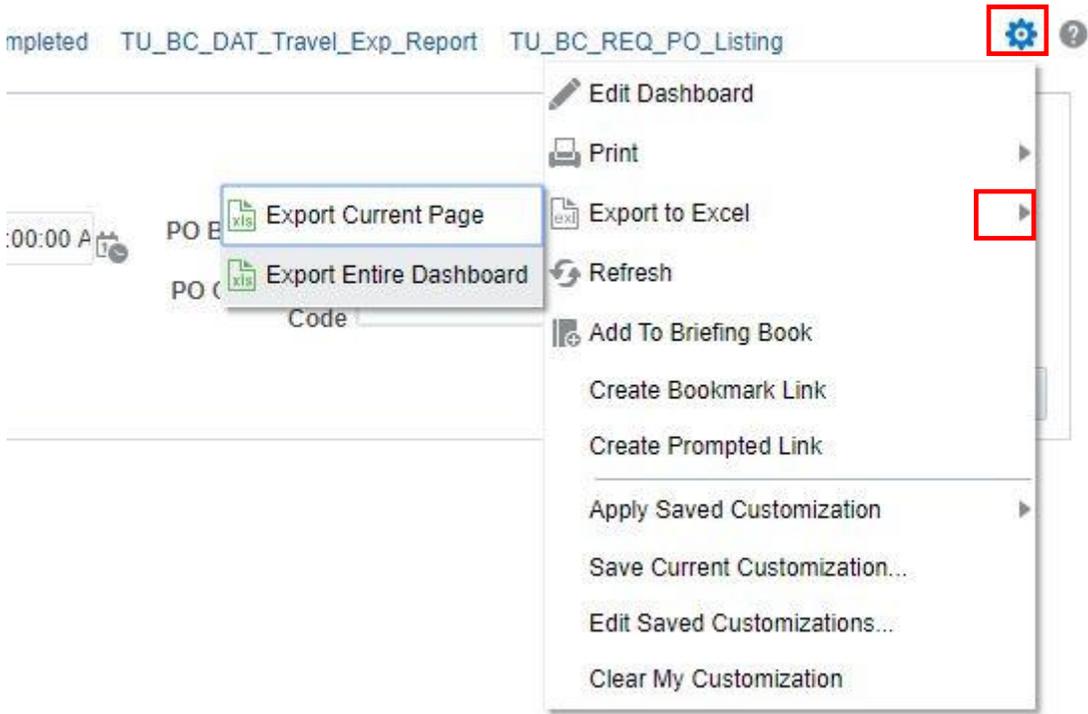
Once you export to Excel you will notice all of the tabs at the bottom of the spreadsheet.
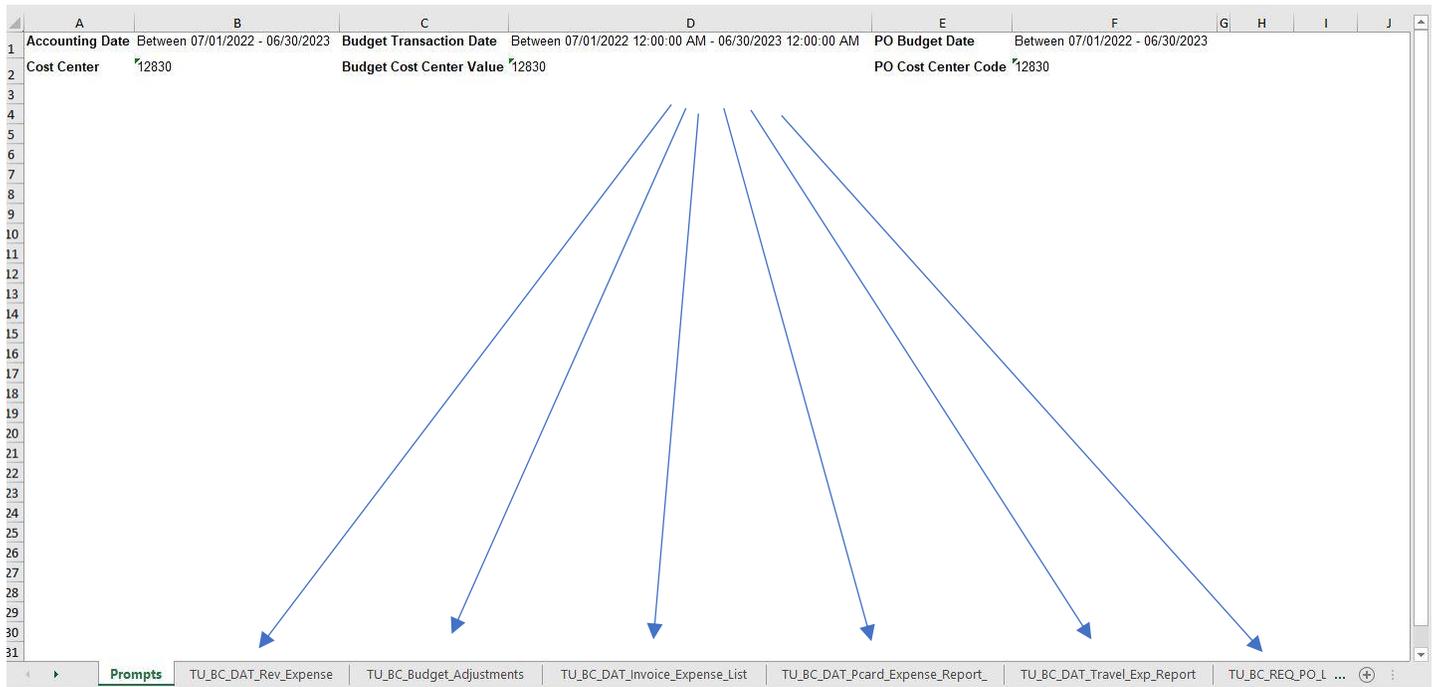
In Stratus an excel export process complete message box will be displayed as seen below. Click OK.
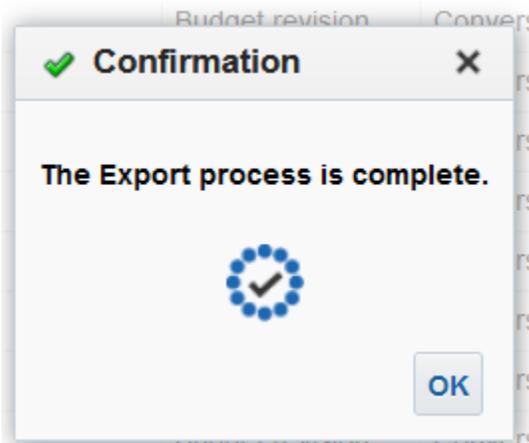
You will be returned to the dashboard report where you can run again by navigating to the prompt tab and enter new criteria and click apply then follow same steps as above.
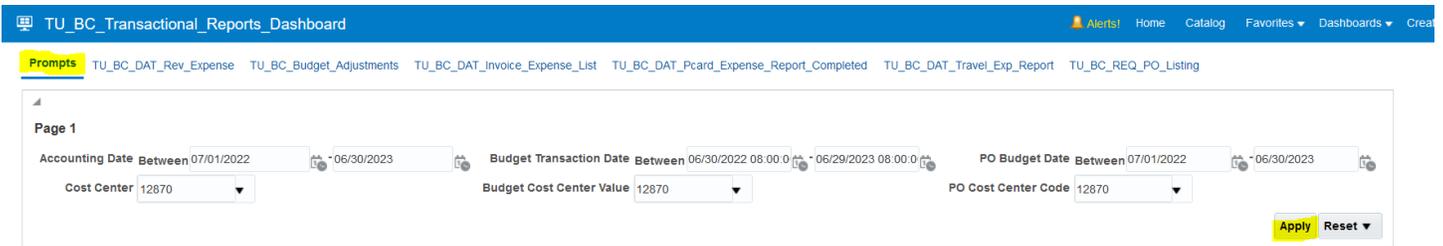
To return to the report menu, click Catalog in the blue banner.