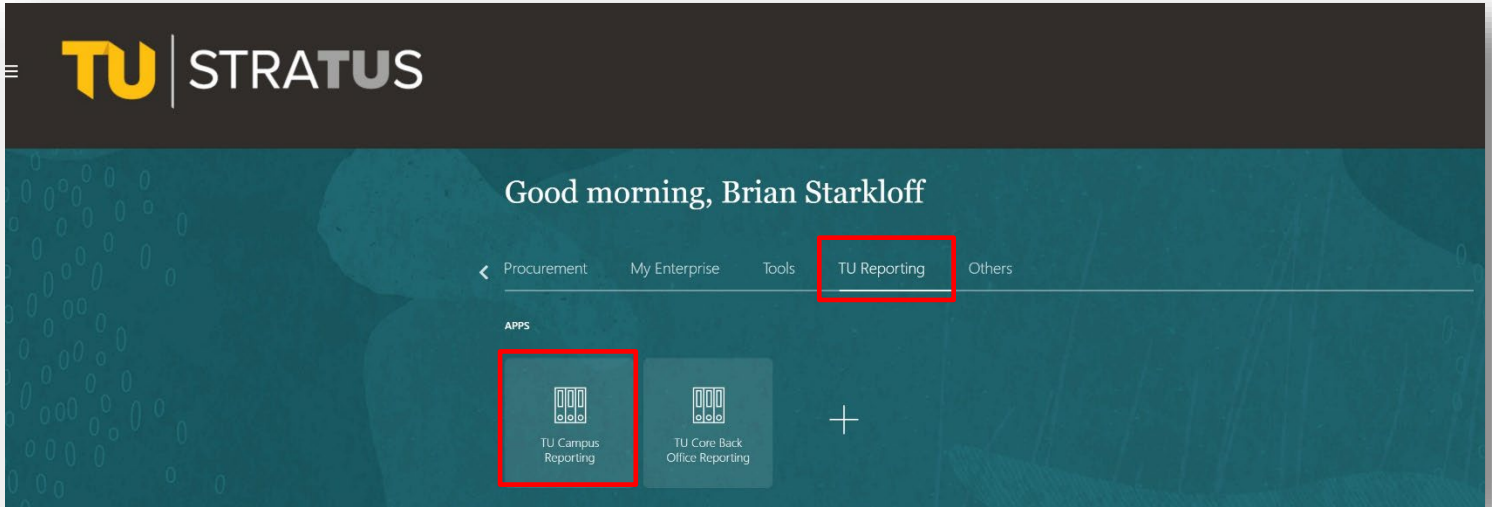


How to Run the Transactional Dashboard Report

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 TU Reporting, then select the TU Campus Reporting app.



Select Transactional Reports Dashboard

Reporting Dashboard

<p>▲ Budget Summary Reports</p> <p>Cost Center Reports (Formatted Report) Multiple Cost center prompts separated with commas (,) Dept Cost Center Budget Summary by Account Dept Cost Center Budget Summary by Parent Account Grant Cost Center Budget Summary by Account through FY26 Grant Cost Center Budget Summary by Account through FY25 Grant Cost Center Budget Summary by Account through FY24 Grant Cost Center Budget Summary by Parent Account through FY26 Grant Cost Center Budget Summary by Parent Account through FY25 Grant Cost Center Budget Summary by Parent Account through FY24 Project Cost Center Budget Summary by Account through FY26 Project Cost Center Budget Summary by Account through FY25 Project Cost Center Budget Summary by Account through FY24 Project Cost Center Budget Summary by Parent Account through FY26 Project Cost Center Budget Summary by Parent Account through FY25 Project Cost Center Budget Summary by Parent Account through FY24 Dept Budget Balance Reports (Data Exports) Multiple Cost center prompts separated with a semi colon (;) Department Budget Balance Child Account Report Department Budget Balance Parent Account Report</p> <p>▲ Divisional Summary Rollups</p> <p>Divisional Summary Rollups Divisional Self Support Fund Detailed Summary (NAT) Divisional Self Support Parent Budget Summary Divisional State Fund Detailed Summary (NAT) Divisional State Fund Parent Budget Summary Divisional Agency Fund Detailed Summary (NAT) Divisional Agency Fund Parent Budget Summary Divisional Auxiliary Fund Detailed Summary (NAT) Divisional Auxiliary Fund Parent Budget Summary Divisional Grants Fund Detailed Summary (NAT) through FY26 Divisional Grants Fund Detailed Summary (NAT) through FY25 Divisional Grants Fund Detailed Summary (NAT) through FY24 Divisional Grants Fund Parent Budget Summary through FY26 Divisional Grants Fund Parent Budget Summary through FY25 Divisional Grants Fund Parent Budget Summary through FY24 Divisional Grants Fund Parent Budget Summary through FY23</p> <p>Account Summary by Div and Cost Center Rollups Account Summary by Div and Dept Cost Center Account Summary by Div and Grant Cost Center Account Summary by Div and Grant Cost Center LTD Account Summary by Div and Project Cost Center Account Summary by Div and Project Cost Center LTD</p>	<p>▲ Transaction Details Reports</p> <p>Pcard Expense Reports Multiple Cost center prompts separated with a semi colon (;) Pcard Expense Report Completed Pcard Expense Report Pending Pcard not on Expense report Travel Expense Reports Multiple Cost center prompts separated with a semi colon (;) Travel Expense Report Completed Travel Expense Report Pending TU Travel Mileage Report TU Travel Authorization Campus Version General Transaction Reports Multiple Cost center prompts separated with a semi colon (;) Revenue Expenses All Transactional Details Report Revenue Expense Summary Transaction Invoices Pending Report Invoice Expense List Report Budget Adjustments Report Transactional Reports Dashboard AP Invoice Account Coding Approval Status Report Requisition/PO Reporting Multiple Cost center prompts separated with a semi colon (;) PO Listing Report Requisition Purchase Order Listing Requisitions listing campus report Requisitions not on PO (All statuses campus) Requisitions not on PO Workflow Preview Draft Requisitions Foundation Reimbursement Foundation Payroll Reimbursement Report Foundation Operation Reimbursement Report Student Financials Student Financials Details by Cost Center</p> <p>▲ Fund Balance Reports</p> <p>Multiple Source code prompts separated with commas (,) Fund Balance by Source Code</p>	<p>▲ Campus OSPR_Business & Public Engagement Grant Reporting</p> <p>Multiple Cost center prompts separated with a semi colon (;) *Separated with comma Grant Balances for closing Grant Grant Budget Journal Listing Grant Cost Center FY BDGT Bal by Acct Grant Cost Center FY Expense BDGT Bal Grant Cost Center Listing Grant Cost Center PTD BDGT Bal by Acct Grant Cost Center PTD BDGT Bal by Parent Acct Grant Cost Center PTD BDGT Bal NoAcct Grant Rev & Exp Journal by Cost Center Range Grants Expense summary with budget revisions (Year) Grant Cost Center Summary P Report PriorYr *</p> <p>▲ COA Reports (Data Exports)</p> <p>Cost Center Report-Campus Natural Account Report-Campus Initiative Report Source Report Campus</p> <p>▲ Accounts Receivable</p> <p>TU AR Memo Lines by Department TU Customer Details Report AR Transaction Detail AR Find Unapplied Payments Report AR Transaction Balance with DD by Customer AR Transaction Balance with DD by Transaction Source AR Transaction Balance with DD BPE</p> <p>▲ Payroll</p> <p>STRATUS DPR</p>	<p>▲ Campus Divisional Budget Officers</p> <p>Facilities Management Multiple Cost centers separated with a comma (,) Project Cost Center Summary P Report PriorYr Fund Balance by Self/Aux Source Reports *Has additional Subdivision prompt Fund Balance by Self/Aux Source Division 01 Fund Balance by Self/Aux Source Division 02* Fund Balance by Self/Aux Source Division 03 Fund Balance by Self/Aux Source Division 04* Fund Balance by Self/Aux Source Division 05* Fund Balance by Self/Aux Source Division 06 Fund Balance by Self/Aux Source Division 08 Fund Balance by Self/Aux Source Division 09 Fund Balance by Self/Aux Source Division 10 Fund Balance by Self/Aux Source Division 13* Fund Balance by Self/Aux Source Division 15</p> <p>▲ Campus Inventory Coordinator</p> <p>FA Active Asset Detail Campus Version Report FA Retired Asset Detail Campus/Version Report</p> <p>▲ BPA Committee</p> <p>AP Invoice Account Coding Approval Status Report Parent Budget vs Actual By Cost Center and Div Accounts Payable Turnover Metric Summary report Accounts Payable Turnover Metric detailed report Expense report Turnover rate metric report</p>
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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](#)

Page 1

Accounting Date Between 07/01/2022 - 06/30/2023 Budget Transaction Date Between 07/01/2022 12:00:00 A - 06/30/2023 12:00:00 A PO Budget Date Between 07/01/2022 - 06/30/2023

Cost Center 12830 Budget Cost Center Value 12830 PO Cost Center Code 12830

Apply Reset

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

TU_BC_Transactional_Reports_Dashboard Alerts! Home Catalog Favorites Dashboards Create Open

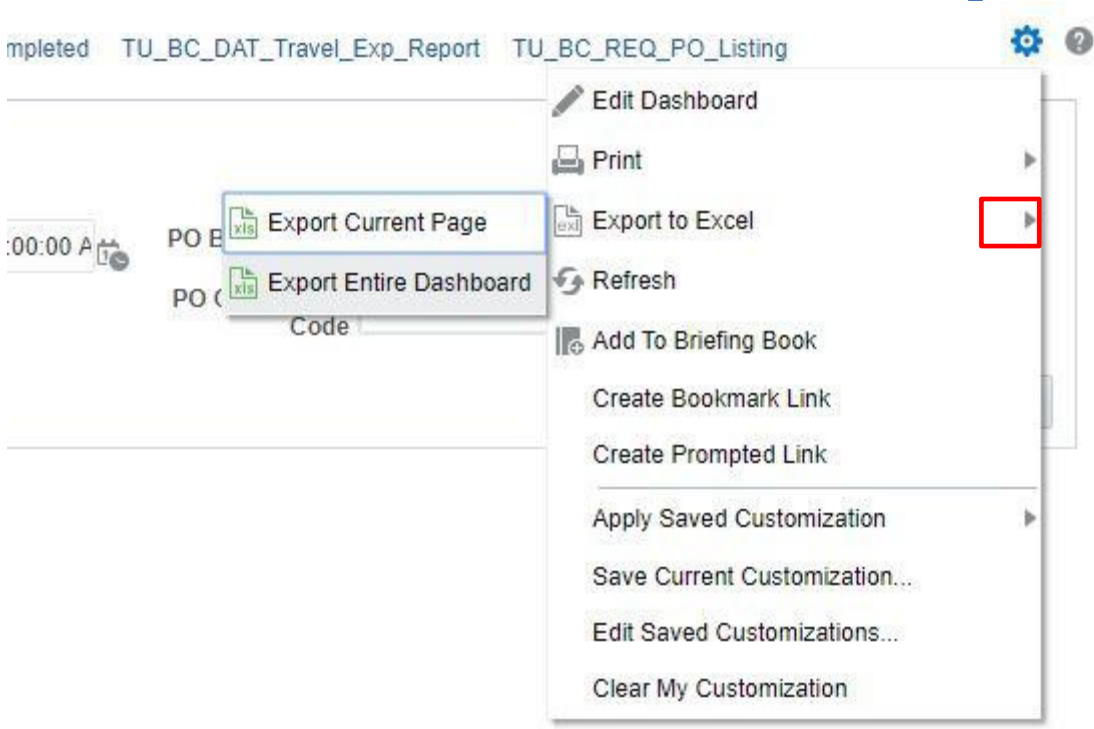
Prompts [TU_BC_DAT_Rev_Expense](#) [TU_BC_Budget_Adjustments](#) [TU_BC_DAT_Invoice_Expense_List](#) [TU_BC_DAT_Pcard_Expense_Report_Completed](#) [TU_BC_DAT_Travel_Exp_Report](#) [TU_BC_REQ_PO_Listing](#)

1_TU_BC_DAT_Rev_Expense_DB

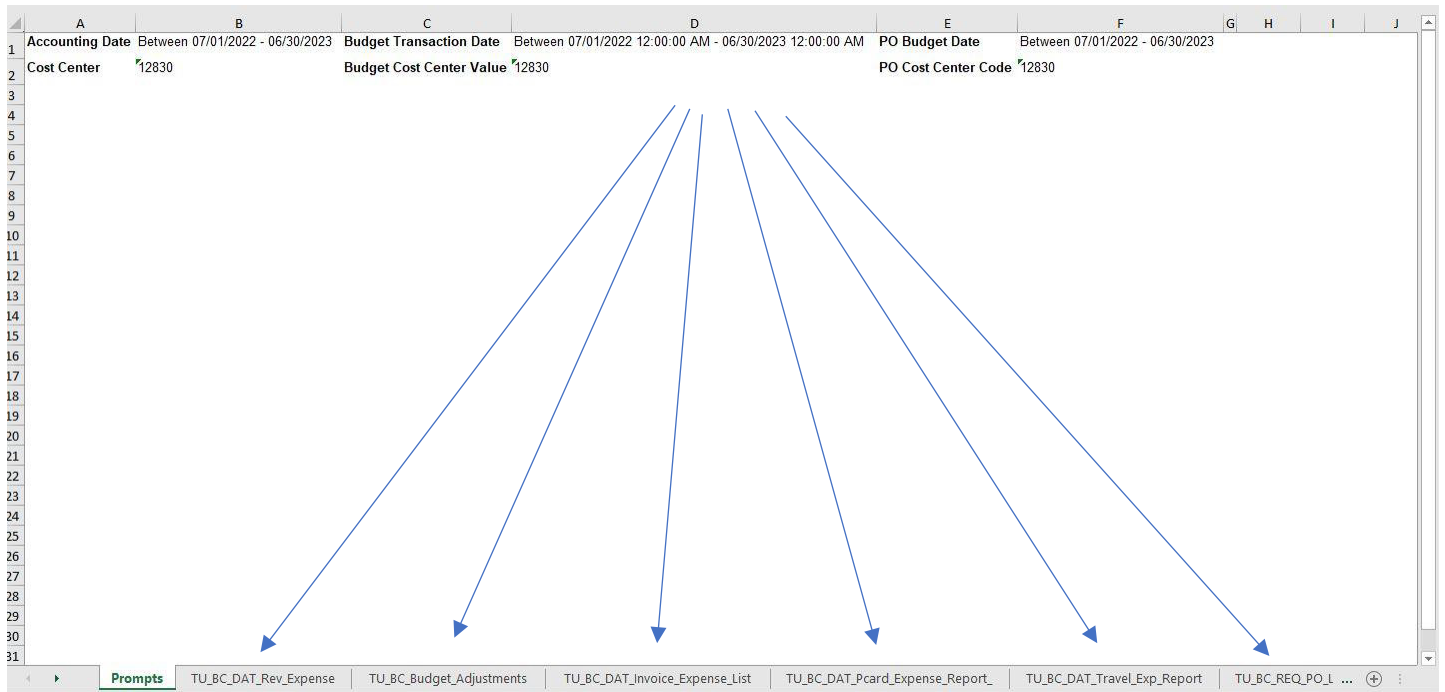
Ledger Name	Accounting Year	Accounting Period Number	Accounting Period Name	Accounting Date	Source	Cost Center	Description	Account	Description	Initiative Segment Value	Objective Segment Value	Journal Total Entered Debit	Journal Total Entered Credit	Journal Name	Journal Line Number	Accounting Sequence 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

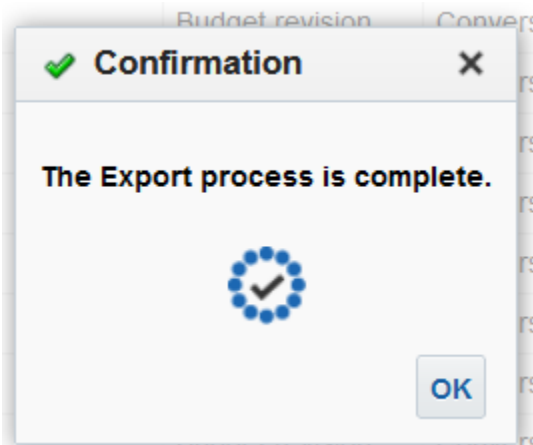
You can chose to export entire dashboard (example) or the current report you are displaying.



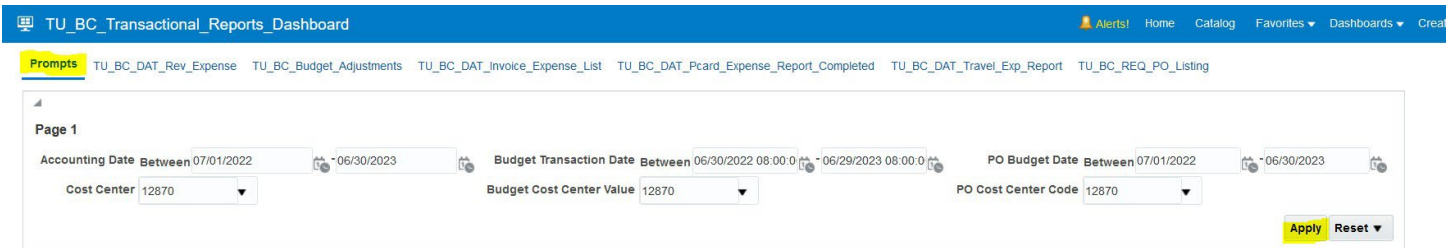
Once you export to Excel you will notice all of the tabs at the bottom of the spreadsheet.



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.

