Running your Standard Reports

These instructions will assist you with running the standard reports you created in sections 3.0 – 7.0.

1. **Standard Operating Reports**

   - **Department Level**
     Dashboards > Financial Reporting > Management My Budget as of Period > Page Options > Apply Saved Customizations > ___________________________________

   - **School / Division Level**
     Dashboards > Financial Reporting > Management My Budget as of Period > Page Options > Apply Saved Customizations > ___________________________________

   - **Cabinet Level**
     Dashboards > Financial Reporting > Management My Budget as of Period > Page Options > Apply Saved Customizations > ___________________________________

2. **Standard Fund CY Activity Report**

   - Dashboards > Financial Reporting > Management My Budget As of Period > Page Options > Apply Saved Customization > ___________________________________

3. **Standard Fund Balance to Date Report**

   - Dashboards > Financial Reporting > Management My Budget As of Period > Page Options > Apply Saved Customization > ___________________________________

4. **Standard Open POs Report**

   - Dashboards > Transaction Inquiry > Open PO Reports > Open PO Views > Page Options > Apply Saved Customizations > ___________________________________

   Use the Report views to see Open POs by fund, department, or supplier. If you use the Open POs by Supplier, use the Supplier Sdescr dropdown to select the desired supplier.

5. **Standard Actual Transactions Report**

   - Dashboards > Transaction Inquiry > Actuals Reports > Actuals Transactions > Page Options > Apply Saved Customizations > ___________________________________

Getting Assistance

If you need assistance, please use the preferred sources and order in which to contact listed below:

- Campus Training website (http://www.csub.edu/training/pgms/fdwp2/index.html)
- Level One Support – Dean or Division Budget Analyst
- Level Two Support – Paula and Terri Radney
- Level Three Support – Michelle Mills