



# **BUSINESSPLUS LEVEL II**

Gayla Jenner

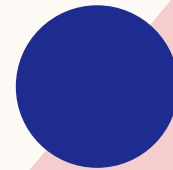
# AGENDA

Introduction

Dashboards

Running Reports

Question Time



# INTRODUCTION

Congratulations on being a “Level I” user! On to “Level II” where we will explore ways to customize your BusinessPlus experience as well as reporting tips that may save you some additional steps and/or time.

# CUSTOMIZING YOUR DASHBOARD

## MY NAME'S Personal Dashboard

MY NAME'S Personal Dashboard Accounting Group

### Miscellaneous

- [Test Cognos Chart](#)
- [Cognos Link](#)
- [HREMEN Employee Master](#)
- [HRPYPA Pay Assignments](#)
- [NUUPUS User Information](#)

### TO and EO customization

- [Timecard Online](#)
- [TO Setup](#)
- [Timecard Entry Status Review](#)
- [Timecard Entry Audit Report by Depart...](#)

Go to CDD Archive

### Go to Jobs Archive

Desc	Job #	Status	Start	End	Type
No items to display					

Refreshed at Monday, July 24, 2023 1:53:47 Your Jobs ☐

### Go to Workflow Tasklist

No tasks

Refreshed at Monday, July 24, 2023 1:53:47 In Office ☐

# CUSTOMIZING YOUR DASHBOARD

pre-defined dashboards

## MY NAME'S Personal Dashboard

MY NAME'S Personal Dashboard Accounting Group

components

### Miscellaneous

- Test Cognos Chart
- Cognos Link
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Refreshed at Monday, July 24, 2023 1:53:47

Your Jobs ☐

### Go to Workflow Tasklist

No tasks

Refreshed at Monday, July 24, 2023 1:53:47 In Office ☐

# CUSTOMIZING YOUR DASHBOARD

Components:

Links  
Job Monitor  
Tasklist  
CDD Folder  
Active Users\*

MY NAME'S Personal Dashboard

MY NAME'S Personal Dashboard Accounting Group

Miscellaneous

- Test Cognos Chart
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TO and EO customization

- Timecard Online
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- Timecard Entry Status Review
- Timecard Entry Audit Report by Depart...

Go to CDD Archive

Go to Jobs Archive

Desc	Job #	Status	Start	End	Type
No items to display					

Refreshed at Monday, July 24, 2023 1:53:47

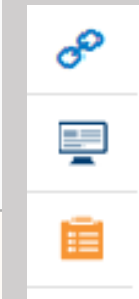
Your Jobs ☐

Go to Workflow Tasklist

No tasks

Refreshed at Monday, July 24, 2023 1:53:47 In Office ☐

LINKS can include any of the following items:



URL link

Menu Mask

CDD Report



Add Component

Change Layout

Restore Default

Undo Changes

SAVE!



# CUSTOMIZING YOUR DASHBOARD



STEP 1: Choose Your Layout

Change Title if desired

Choose Layout if desired

Task Center Details

Title

MY NAME'S Personal Dashboard

Layout ?

☐ Default

☐ 6-6

☐ 4-8

☐ 12/4-4-4

☐ 12/6-6

☐ 12/6-6/12

☒ 4-8 (12/6-6)

Close

OK

Click OK to complete

# CUSTOMIZING YOUR DASHBOARD



## STEP 2: Choose Your Component

### Add Component

☒ Links Component LINKS are where most of your customizing will take place. Use this area to add frequently-used menu masks or reports.

☐ Job Monitor Component

☐ Tasklist Component

☐ CDD Folder Component

☐ Active Users Component

These components will likely be added ONCE, and then no further activity needs to be taken.

N/A for most users.

CloseAdd

Click ADD when complete



# CUSTOMIZING YOUR DASHBOARD

## STEP 2a: For LINKS component only

**Settings - Miscellaneous**

**Weblink** **CDD** Link(s) to Add

**ADD A CDD REPORT**

**OR**

**ADD A WEB LINK**

**Settings - Miscellaneous**

**CDD** **Weblink** Link(s) to Add

Description  
My website

Web Address  
www.mywebsite.com

**Add Link**

**Click ADD LINK(S) when complete**

**Close** **Add Link(s)**

**Close** **Add Link(s)**

# CUSTOMIZING YOUR DASHBOARD

## STEP 2b: For LINKS Component only

The screenshot shows the 'GAYLA'S Personal Dashboard' interface. On the left is a main menu with the following items: PO Format Information, General Information, Purchase Order Entry, PunchOut Web Shopping, **Purchase Requests** (highlighted with a hand cursor), Receiving Information, and Security Codes. On the right is the dashboard area, which currently contains a 'Miscellaneous' component and a list of other components: Test Cognos Chart, Cognos Link, HREMEN Employee Master, HRPYPA Pay Assignments, and NUPUS User Information. A dashed box highlights the 'Purchase Requests' component being added to the dashboard, with a hand cursor pointing to it.

To add a menu mask:  
navigate in the main  
menu, then drag and  
drop into your  
Component.



Remember to **SAVE**  
after your changes are  
complete!

# CUSTOMIZING YOUR DASHBOARD

## STEP 3: Arrange Your Components

MY NAME'S Personal Dashboard Create New Dashboard

MY NAME'S Personal Dashboard Accounting Group

+

Miscellaneous

- Test Cognos Chart
- Cognos Link
- HRMEN Employee Master
- HRPYA Pay Assignments
- NUUPUS User Information

TO and EO customization

- Timecard Online
- TO Setup
- Timecard Entry Status Review
- Timecard Entry Audit Report by Department

Go to CDD Archive

CDD Folders

Go to Jobs Archive

Desc	Job #	Status	Start	End	Type
No items to display					

Refreshed at Monday, July 24, 2023 2:55:09

Your Jobs ☐

**MOVE:** drag and drop your item into the layout  
**HELP:** brief definition of component  
**CONFIGURE:** only applicable for LINKS  
**REMOVE:** removes component from dashboard

# CUSTOMIZING YOUR DASHBOARD

## STEP 4: SAVE your dashboard

MY NAME'S Personal Dashboard

MY NAME'S Personal Dashboard Accounting Group

+

Go to Jobs Archive

Desc	Job #	Status	Start	End	Type
No items to display					

Refreshed at Monday, July 24, 2023 1:53:47

Your Jobs ☐

Go to Workflow Tasklist

No tasks

Refreshed at Monday, July 24, 2023 1:53:47 In Office ☐

Go to CDD Archive

Remember to  
SAVE!

# RUNNING REPORTS



# RUNNING REPORTS

Jobs Monitor

Go to Jobs Archive

Desc	Job #	Status	Start	End	Type
Transaction Recap: TRANS_RECAP	3434334	In Progress (1 Pages)	7/25/2023 8:46:09 AM		CDD Report

1

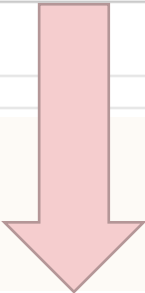
1 - 1 of 1 items

Job Details

Job:	3434334	Status:	In Progress (1 Pages) <span>✖</span>
Desc:	Transaction Recap: TRANS_RECAP	Start:	7/25/2023 8:46:09 AM
Type:	CDD Report	End:	

Attachments

Doc	Type	Desc
Tail	Tail Sheet	Tail Sheet for Job #3434334
Report	CDD Report	Transaction Recap



Status:	Cancel Requested
Start:	7/25/2023 8:46:09 AM
End:	

# RUNNING REPORTS

**Jobs Monitor**

[Go to Jobs Archive](#)

Desc	Job #	Status
Transaction Recap: TRANS_RECAP	3434334	In Progress (1 Pages)

Navigation: **1**

**Job Details**

Job:	3434334	Status:
Desc:	Transaction Recap: TRANS_RECAP	Start:
Type:	CDD Report	End:

**Attachments**

Doc	Type	Desc
<a href="#">Tail</a>	Tail Sheet	Tail Sheet for Job #3434334
<a href="#">Report</a>	CDD Report	Transaction Recap

**Attachments**

Doc	Type	Desc
<a href="#">Tail</a>	Tail Sheet	Tail Sheet for Job #3434334
<a href="#">Report</a>	CDD Report	Transaction Recap

## Report Tailsheet for CDD 7i Output

**Job Number: 3434351**

**User: 04035**

**CDD Report ID: TRANS\_RECAP**

**CDD Report Description: Transaction Recap**

### Prompts

Enter the Start Date: : 07/01/2023

Enter the End Date: : 07/31/2023

Do you wish to suppress payroll contributions? : N

Enter the value for 'FUND': : 1\*

Enter the value for 'LOCATION': : 101

Enter the value for 'TYPE CODE': : \*

Enter the value for 'OBJECT': : \*

Enter the value for 'SUBFUND': : \*

Enter the value for 'Purchase Order Number': : \*

Enter the value for 'DESCRIPTION': : \*

**BusinessP...** Transaction Recap (1)

Navigation:

**Transactions by Key-Object** Selection: GLKEY[glk\_grp\_part01] LIKE '1%' AND GLKEY[glk...

GL Ledger Code: GL  
Fiscal Year: 2023

**REVENUES**

Account:	11-01-22-101-081000	EMES LIBRARY REVENUE	EMERSON ELEMENTARY SCHOOL
Obj	Post Date	Vendor/Description	Receipt Invoice Check # Debit Credit
32600	07/06/2023	LIBRARY BOOK FINE	N/A N/A CR01-06282023 0.00 24.00
		FINES AND DAMAGES	Totals: 0.00 24.00 24.00
		Account 11-01-22-101-081000	Totals: 0.00 24.00 24.00

**BusinessPlus** Transaction Recap

Selection Criteria Prompts

Enter the Start Date: 07/01/2023

Enter the End Date: 07/31/2023

Do you wish to suppress payroll contributions? N

Enter the value for 'FUND': 1\*

Enter the value for 'LOCATION': 100:199

Enter the value for 'TYPE CODE': \*

Enter the value for 'OBJECT': \_3\_

Enter the value for 'SUBFUND': 10,11

Enter the value for 'Purchase Order Number': \*

Enter the value for 'DESCRIPTION': \*

Add Prompt Cancel Submit

Dates vs. Date Ranges

Asterisk ('\*') = Wildcard (or '%')

Range of Values with Colon

Character Replacement with Underscore

Multiple Value Search with Comma



# RUNNING REPORTS

**BusinessPlus** Transaction Recap

Selection Criteria Prompts

Enter the Start Date: 07/01/2023

Enter the End Date: 07/31/2023

Do you wish to suppress payroll contributions? N

Enter the value for 'FUND': 1\*

Enter the value for 'LOCATION': \*

Enter the value for 'TYPE CODE': \*

Enter the value for 'OBJECT': \*

Enter the value for 'SUBFUND': \*

Enter the value for 'Purchase Order Number': \*

Enter the value for 'DESCRIPTION': \*

Selection Criteria Prompts

- No Criteria; Select All Prompts
- ask for PEID
- Excluding TYPE prompt
- temp

Enter the value for 'SUBFUND': \*

Enter the value for 'Purchase Order Number': \*

Enter the value for 'DESCRIPTION': \*

Add Prompt Cancel Submit




Add Prompt Cancel Submit

Any added prompt will be evaluated as an EQUAL TO statement

# RUNNING REPORTS





Archive

ALL CDD Reports   


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Go to CDD Archive

CDD Folders 


 **BusinessPlus**

CDD Archive

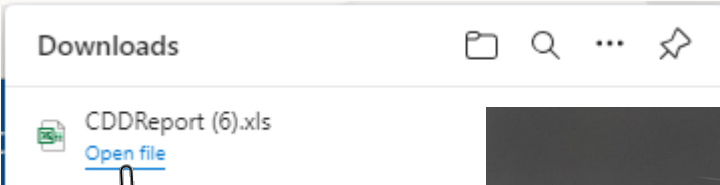
From Date: 07/17/2023 

To Date: 07/24/2023 

▼ CDD Reports

- ▶ Aaaa
- ▶ Accounting
- ▶ All
- ▶ ASB Reports
- ▶ Budget 
- ▶ Capital Projects
- ▶ Finance
- ▶ Fixed Assets

# RUNNING REPORTS



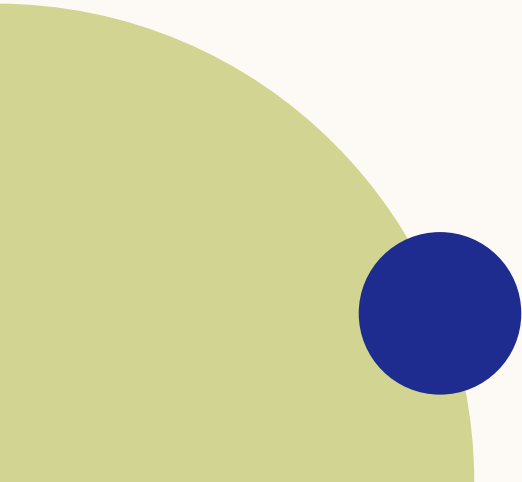
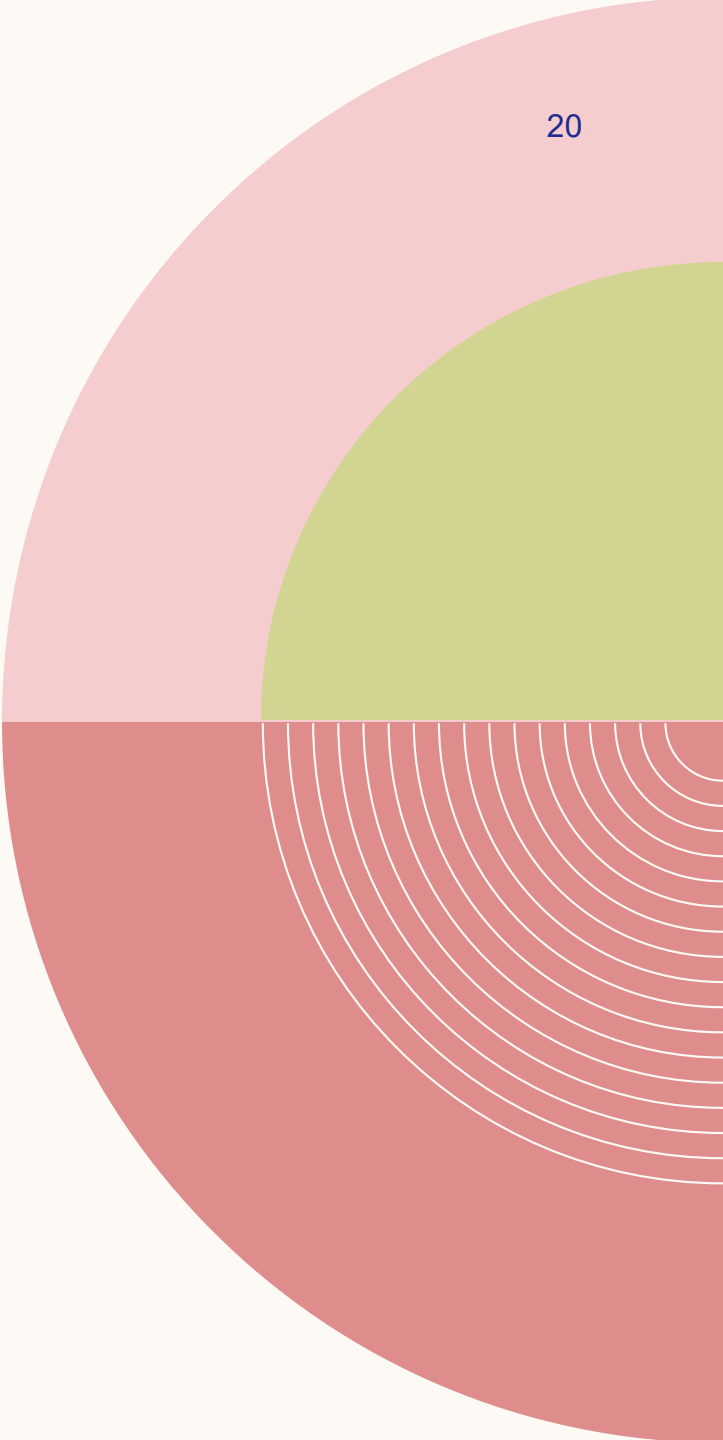
AutoSave Off CDDReport (6... Search

File Home Insert Page Layout Formulas Data Review View Automate Developer

Clipboard Font Alignment Number Styles

A1 GL Ledger Code:

A	B	C	D	E	F	G	H	I	J	K
1	GL Ledger	Fiscal Year	GL	2023	Transactio	7/1/2023	through	#####	GLKEY.[gl	Selection:
2	REVENUES									
3	Account:	11-01-22-1	EM ES LIB	EMERSON	ELEMENTARY SCHOOL					
4	Obj	Post Date	Vendor/D	Receipt	Invoice	Check #	Debit	Credit		
5	32600	7/6/2023	LIBRARY B	N/A..N/A	CR01-0628	2023		0	24	
6	32600	FINES ANI	Totals:		0	24	24			
7	Account	11-01-22-1	Totals:		0	24	24			
8	Account:	11-79-27-1	ART FIELD	EMERSON	ELEMENTARY SCHOOL					
9	Obj	Post Date	Vendor/D	Receipt	Invoice	Check #	Debit	Credit		
10	32100	7/6/2023	SCHACK A	29073	158313	19798		0	222.65	
11	32100	TUITION 8	Total		0	222.65	222.65			
12	Account	11-79-27-1	Total		0	222.65	222.65			
13	TOTAL	REVENUES		46.65	246.65					
14	Report:	User:	0403L	NS_RE	Page:	1	Current D	Time:	#####	8:55:48
15	GL Ledger	Fiscal Year	GL	2023	Transactio	7/1/2023	through	#####	GLKEY.[gl	Selection:
16	TRANSFERS	OUT								
17	Account:	11-79-27-1	EM ES PTA	EMERSON	ELEMENTARY SCHOOL					
18	Obj	Post Date	Vendor/D	Inv/Refer	PO #	Check #	Debit	Credit		
19	50075	#####	EME TO 76	T001A02			500	0		



# THANK YOU

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