OpenGov Basic Navigation Tips

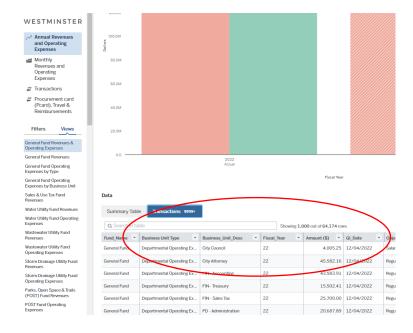
Last updated 12/20/2022

General Navigation Tips

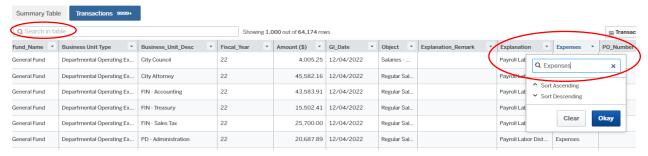
Reports and views for each report may be found on the left side of the main screen:



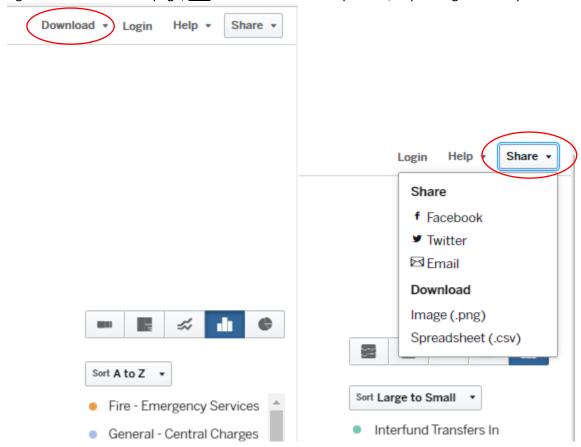
- Standard report views are set up by City staff, however, "Filter" options are available next to the views option for end users who desire to set up their own report views.
- All reports include data visualization and charts may be changed depending on your preference (e.g. pie charts, line charts, bar charts).
- All reports include <u>data tables below the charts</u> so you can see summary information or detailed transactions using the data tables.



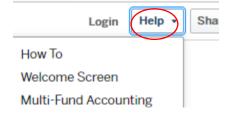
• Data tables are searchable using a search field above the charts, or by selecting a column header (e.g. business unit, department) within the detailed table below the charts.



• Depending on the report, data tables can be exported using the "Download" button in the top right corner of the main page, **OR** under the "Share" drop-down, depending on the report.



• Each report also has a "Help" option to help with using the reports.



Report-Specific Navigation Tips

Expense Transaction Report

Within an expense transaction report, <u>Explanation/Remark</u> generally provides a brief description regarding the nature of the transaction; however, not all transactions contain an explanation/remark.

<u>Explanation</u> typically involves a vendor name (if the expense was paid by check), Pcard (if the expense was made by Pcard), or an alternate explanation (e.g. expenses processed by journal entry).

<u>Business Unit Desc</u> is the name of a business unit, and generally represents a division of a department.



Procurement card (Pcard), Travel & Reimbursements Report

Within a Pcard, Travel & Reimbursements report, <u>CC_Vendor</u> is the vendor if the payment was processed by a Pcard. A Pcard is similar to a credit card and is used by city staff to make small purchases.

Comment is a short description of the nature of the expense.

<u>Report description</u> either indicates the expense was a Pcard purchase, expense was tied to a travel report (e.g. travel location with dates of travel), or the expense was an employee reimbursement.

