

# 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:

The screenshot shows the OpenGov interface. On the left is a navigation menu for 'WESTMINSTER' with various report categories. The 'Annual Revenues and Operating Expenses' item is circled in red. Below it, the 'Filters Views' section is also circled in red. On the right, a bar chart titled 'Annual Revenues and Operating Expe' is displayed, showing data for '2022 Actual' with a value of approximately 160M. The chart is broken down by 'Types' and set to 'General Fund'.

- 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 data tables below the charts so you can see summary information or detailed transactions using the data tables.

This screenshot provides a more detailed view of the 'Annual Revenues and Operating Expe' report. It features a bar chart showing '2022 Actual' data for 'Fiscal Year' with a value of approximately 160M. Below the chart is a 'Data' section with a 'Summary Table' and a 'Transactions' button (circled in red). The data table shows a list of transactions with columns for Fund Name, Business Unit Type, Business Unit Desc, Fiscal Year, Amount (\$), GL Date, and Class.

Fund Name	Business Unit Type	Business Unit Desc	Fiscal Year	Amount (\$)	GL Date	Class
General Fund	Departmental Operating Ex...	City Council	22	4,005.25	12/04/2022	Salari
General Fund	Departmental Operating Ex...	City Attorney	22	45,582.16	12/04/2022	Regu
General Fund	Departmental Operating Ex...	FIN - Administration	22	43,583.91	12/04/2022	Regu
General Fund	Departmental Operating Ex...	FIN - Treasury	22	15,502.41	12/04/2022	Regu
General Fund	Departmental Operating Ex...	FIN - Sales Tax	22	25,700.00	12/04/2022	Regu
General Fund	Departmental Operating Ex...	PD - Administration	22	20,687.89	12/04/2022	Regu

- 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.

Summary Table Transactions 9999+

Q Search in table Showing 1,000 out of 64,174 rows

Fund_Name	Business Unit Type	Business_Unit_Desc	Fiscal_Year	Amount (\$)	Gl_Date	Object	Explanation_Remark	Explanation	Expenses	PO_Number
General Fund	Departmental Operating Ex...	City Council	22	4,005.25	12/04/2022	Salaries - ...		Payroll Lat...		
General Fund	Departmental Operating Ex...	City Attorney	22	45,582.16	12/04/2022	Regular Sal...		Payroll Lat...		
General Fund	Departmental Operating Ex...	FIN - Accounting	22	43,583.91	12/04/2022	Regular Sal...		Payroll Lat...		
General Fund	Departmental Operating Ex...	FIN - Treasury	22	15,502.41	12/04/2022	Regular Sal...		Payroll Lat...		
General Fund	Departmental Operating Ex...	FIN - Sales Tax	22	25,700.00	12/04/2022	Regular Sal...		Payroll Lat...		
General Fund	Departmental Operating Ex...	PD - Administration	22	20,687.89	12/04/2022	Regular Sal...		Payroll Labor Dist...	Expenses	

- 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.

Download Login Help Share

Login Help Share

Share

- Facebook
- Twitter
- Email

Download

- Image (.png)
- Spreadsheet (.csv)

Sort A to Z

- Fire - Emergency Services
- General - Central Charges

Sort Large to Small

- Interfund Transfers In

- Each report also has a “Help” option to help with using the reports.

Login Help Sha

How To

Welcome Screen

Multi-Fund Accounting

## Report-Specific Navigation Tips

### Expense Transaction Report

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

Explanation 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).

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

Summary										
Details										
Fund_Name	Business Unit Type	Business_Unit_Desc	Amount (\$)	Gl_Date	Object	Explanation_Remark	Explanation	Expenses	PO_Number	Project
Legacy Ridge Fund	Departmental Operating Expe...	Legacy Ridge - Facilities	11.63	12/02/2022	Electricity & ...	5304061676	10001 FEDERAL BL...	Expenses		No Project
Water Fund	Departmental Operating Expe...	Water - Plants	11.73	12/02/2022	Electricity & ...	5304064093	11326 KENDALL ST	Expenses		No Project
Water Fund	Departmental Operating Expe...	Water - Plants	19.18	12/02/2022	Electricity & ...	5304064173	11658 PECOS ST	Expenses		No Project
Water Fund	Departmental Operating Expe...	Water - Plants	27.08	12/02/2022	Electricity & ...	5304064548	4476 W 112TH AVE	Expenses		No Project
General Fund	Departmental Operating Expe...	Fire - Emergency Services	641.08	12/02/2022	Electricity & ...	5306062777	3948 W 73RD AVE	Expenses		No Project

### Procurement card (Pcard), Travel & Reimbursements Report

Within a Pcard, Travel & Reimbursements report, CC Vendor 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.

Report description 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.

Records										
Dept_Desc	Division_Desc	CC_Vendor	Expense_Amount (\$)	Expense_Date	Comment	Report_Date	Report_Description	Expense_Type	Report_Type	
Parks, Recreation & Librar...	Recreation Programs	AMZN MKTP US IH2IP...	67.99	12/01/2022	Balance stepping stones for Tum...	12/02/2022	PCARD	Pcard Expenses	Procurement Card	
Public Works & Utilities	Water Resources & Tre...	HAZEN RESEARCH, INC.	58.00	12/01/2022	FHL Event Rads testing	12/06/2022	PCARD	Pcard Expenses	Procurement Card	
Public Works & Utilities	Water Resources & Tre...	EUROFINS FRONTIER ...	1,680.00	12/01/2022	Arsenic comparison 9/12 10/1...	12/06/2022	PCARD	Pcard Expenses	Procurement Card	
General Services	Fleet Maintenance		20.17	11/29/2022	Paid for lunch while awaiting cour...	11/30/2022	Meal Reimbursement	Business Meals	Employee Reimburs...	
Parks, Recreation & Librar...	Recreation Facilities		354.00	11/29/2022	PGA Level 2 Seminar	11/29/2022	Advanced Frisco TX (1...	Per Diem Meals	Travel and Entertain...	
Parks, Recreation & Librar...	Recreation Facilities		(29.50)	11/29/2022	PGA Level 2 Seminar	11/29/2022	Advanced Frisco TX (1...	Day of Travel Per	Travel and Entertain...	