COMMUNITY AND TECHNICAL COLLEGES
Washington State Board

INSIGHTS DASHBOARD

FSCM

Contacts

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Contents

Overview

This document is to help with understanding the Insights Dashboards.

Insights is a Reporting and Analytics tool that allows organizations to visualize application data. Insights provide visual reports, called visualizations, in the form of charts, tables, graphs, and more. The data and analytics in Insights are secured by PeopleSoft PeopleTools role-based security. The security used for dashboards is not the same as query security or page security. For example, access to Asset Management queries and/or pages will not give you access to Asset Management dashboards and vice versa.

Dashboards – Phase 1

Product	Dashboard	Description	Role Needed	Companion Detail Query	Includes data not less than
Asset Management	CTC Asset Analytics	Analyze asset count, cost, depreciation/amortization expense, and net book value based on asset type and category.	ZD Insights AM View Privilege	QFS_INS_ASSET_ANALYTICS Folder: INSIGHTS	Fiscal Year 2019
		Data Table URL – link to Print an Asset page	ZD Asset Management Inquiry Or ZZ Asset Management Reporting		
Asset Management	CTC Year-Over-Year Asset Analytics	Analyze year-over-year comparisons of asset disposals, depreciation/amortization expense, and cost versus net book value.	ZD Insights AM View Privilege	QFS_INS_ASSET_ANALYTICS Folder: INSIGHTS	Fiscal Year 2019
Payables	CTC Early Detection and Monitoring	To view the liability and payment exposures routed through vouchers.	ZD Insights AP View Privilege	QFS_INS_VCHR_DETECT_TREND Folder: INSIGHTS	Fiscal Year 2020
		Data Table URL – link to Voucher Summary page	ZD Accounts Payable Inquiry Or ZZ Quick Invoice Entry Or ZZ Voucher Approval		
Payables	CTC Trend Analysis	To view the liability exposure across financial periods by summarized voucher related data.	ZD Insights AP View Privilege	QFS_INS_VCHR_DETECT_TREND Folder: INSIGHTS	Fiscal Year 2020
Travel and Expenses	CTC Performance and Operations	Analyze the travel and expense activity in a Business Unit by Operating Unit or department.	ZD Insights EX View Privilege	QFS_INS_EXPNSE_PERF_OPR Folder: INSIGHTS	Fiscal Year 2020
		Data Table URL – link to Expense Report page (Supervisor can access expense reports for their direct reports)	ZZ PeopleSoft User		

*Please note that the **Date Table URL** provides a link to a ctcLink page to which additional role access is required. This access is not provided with dashboard access.*

CTC Asset Analytics

Use the CTC Asset Analytics dashboard to analyze asset count, cost, depreciation/amortization expense, and net book value based on asset type and category.

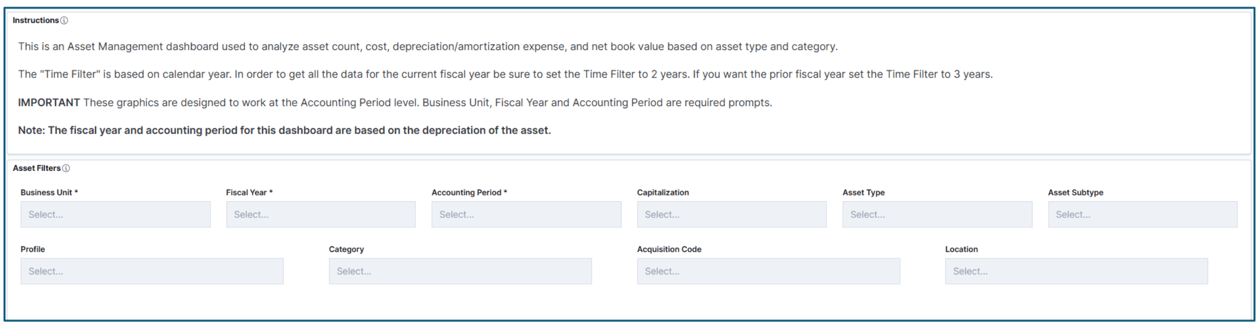
The visualizations and data displayed in this dashboard are based on values selected by the **Business Unit, Fiscal Year,** and **Accounting Period** filters, which are required. **Fiscal Year** and **Accounting Period** values are based on asset depreciation.

You can further filter visualizations and data based on additional filters, such as **Capitalization, Profile** (Asset Profile), and more.

This dashboard contains the following visualizations:

Instructions: Provides instructional data specific to this dashboard.

Asset Filters: Filters to refine dashboard data.

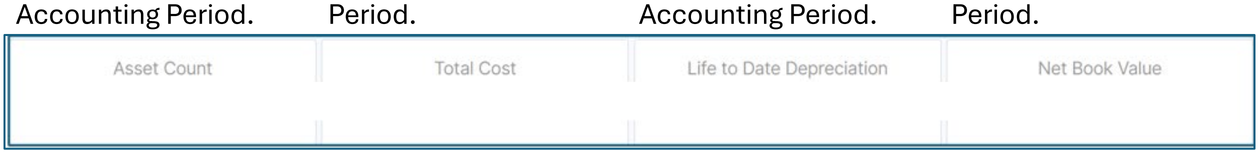


Asset Count: Count of total assets for Fiscal Year and Accounting Period.

Total Cost: Total asset cost for Fiscal Year and Accounting Period.

Life to Date Depreciation: Life to date depreciation for Fiscal Year and Accounting Period.

Net Book Value: Total netbook value of your assets for Fiscal Year and Accounting Period.

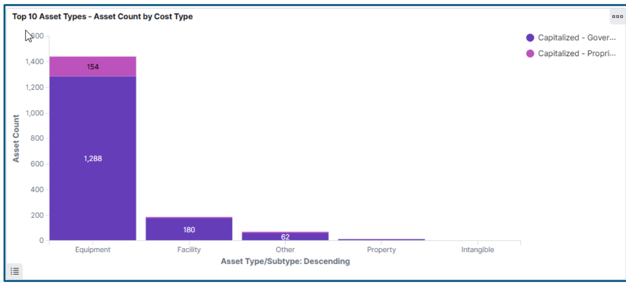


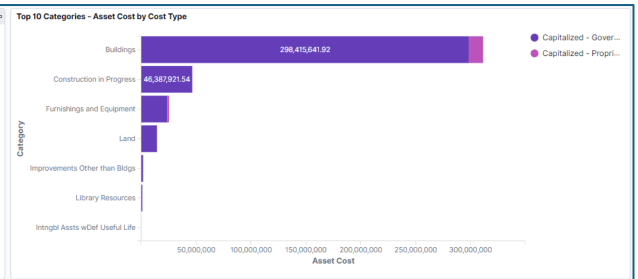
Top 10 Asset Types - Asset Count: Top ten asset types that represent the total asset count.

Top 10 Categories - Asset Cost: The top ten asset categories with the highest asset cost.

Top 10 Asset Types - Asset Count by Cost Type: Top ten asset types by Cost Type that represent the total asset count. The stacked bar chart displays a part-to-whole comparison of Governmental Funds and Proprietary Funds.

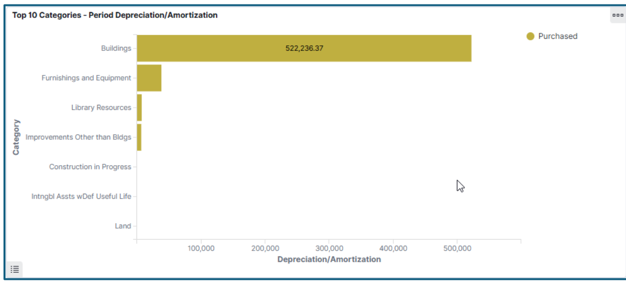
Top 10 Categories - Asset Cost by Cost Type: Top ten asset categories by Cost Type with the highest asset cost. The stacked bar chart displays a part-to-whole comparison of Governmental Funds and Proprietary Funds.

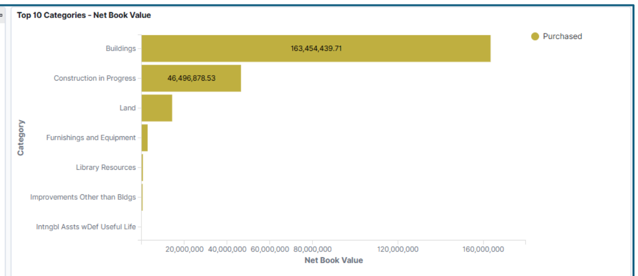




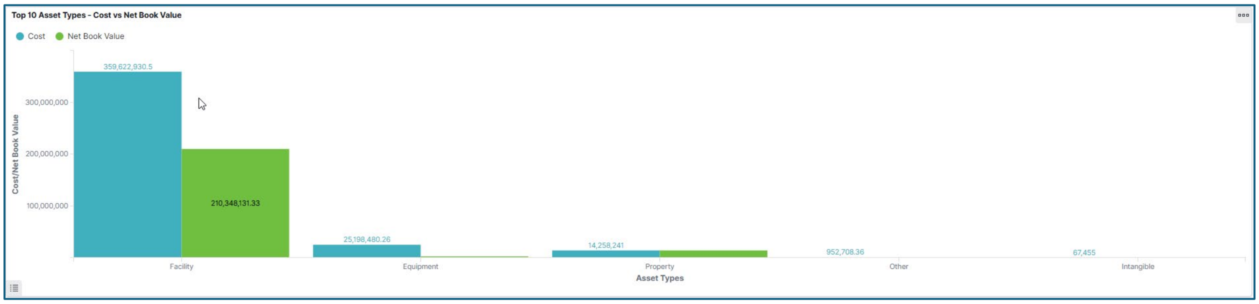
Top 10 Categories - Period Depreciation/Amortization: Top ten asset categories with the highest depreciation/amortization expense by acquisition code.

Top 10 Categories - Net Book Value: Top ten asset categories with the highest net book value by acquisition code.





Top 10 Asset Types - Cost versus Net Book Value*:* Provides a side-by-side comparison of cost and net book value for each of the top ten asset types.



Asset Details: Displays a list of assets making up the data shown in the visualizations. Use the **Asset** link to access the Printable View of Asset page and view further details about the asset.

Asset Details

Business Unit	Fiscal Year	Accounting Period	Asset ID	Tag Number	Details	Asset Description	Category	In Service Date	Useful Life	Location	Cost Type	Class Descr	Cost	Period Depreciation/ Amortization	YTD Depreciation/ Amortization	LTD Depreciation/ Amortization	Net Book Value
	2024	12	000000009991	X009160	Details	4 PACK WELDERS	Furnishings and Equipment	Mar 10, 2022 @ 16:00:00.000	120	Class Laboratory	Governmental Funds	Capitalized	24,378.3	203.18	2,437.83	5,688.27	18,690.03
	2024	12	000000009992	X009161	Details	Nursing Anne Simulator w/PC	Furnishings and Equipment	Mar 31, 2022 @ 17:00:00.000	60	Sim Lab	Governmental Funds	Capitalized	31,611.71	526.88	6,322.34	14,225.27	17,386.44
	2024	12	000000009993	X009162	Details	PARTS WASHER	Furnishings and Equipment	Mar 30, 2022 @ 17:00:00.000	60	Class Laboratory	Governmental Funds	Capitalized	5,732.15	95.49	1,146.43	2,675	3,057.15
	2024	12	000000009994	X009163	Details	PACCAR ENGINE LAPTOP KIT	Furnishings and Equipment	Mar 31, 2022 @ 17:00:00.000	60	Class Laboratory Svc	Governmental Funds	Capitalized	5,121.31	85.3	1,024.26	2,304.59	2,816.72
	2024	12	000000009995	X009164	Details	YAMAHA ROTATING TUBA	Furnishings and Equipment	Jun 1, 2022 @ 17:00:00.000	60	Assembly/theater	Governmental Funds	Capitalized	8,004.29	133.35	1,600.86	3,335.12	4,669.17
	2024	12	000000009996	X009165	Details	CLOTHES WASHER	Furnishings and Equipment	Jun 1, 2022 @ 17:00:00.000	60	Laundry Room	Governmental Funds	Capitalized	16,299.82	271.71	3,259.97	6,791.59	9,508.23
	2024	12	000000009997	X009166	Details	CLOTHES DRYER	Furnishings and Equipment	Jun 1, 2022 @ 17:00:00.000	60	Laundry Room	Governmental Funds	Capitalized	7,088.02	118.18	1,417.61	2,953.34	4,134.68
	2024	12	000000009998	X009167	Details	DELL SERVER	Furnishings and Equipment	Jul 5, 2022 @ 17:00:00.000	48	Dp/telecommunication	Governmental Funds	Capitalized	9,432.15	196.54	2,358.04	4,716.08	4,716.07
	2024	12	000000009999	L12122	Details	LIBRARY ACQUISITIONS	Library Resources	Jun 29, 2022 @ 17:00:00.000	84		Governmental Funds	Capitalized	51,949.38	618.39	7,421.34	15,461.13	36,488.25
	2024	12	000000010000	3000-06	Details	SSIB	Construction in Progress	Jul 19, 2022 @ 17:00:00.000	999		Governmental Funds	Capitalized	4,878,846.21	0	0	0	4,878,846.21
													104,210,972.67	**207,613.84**	**2,511,173.48**	**35,541,732.23**	**68,669,240.44**

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CTC Year-Over-Year Asset Analytics

Use the Year-Over-Year Asset Analytics dashboard to analyze year-over-year comparisons of asset disposals, depreciation/amortization expenses, and cost versus net book value.

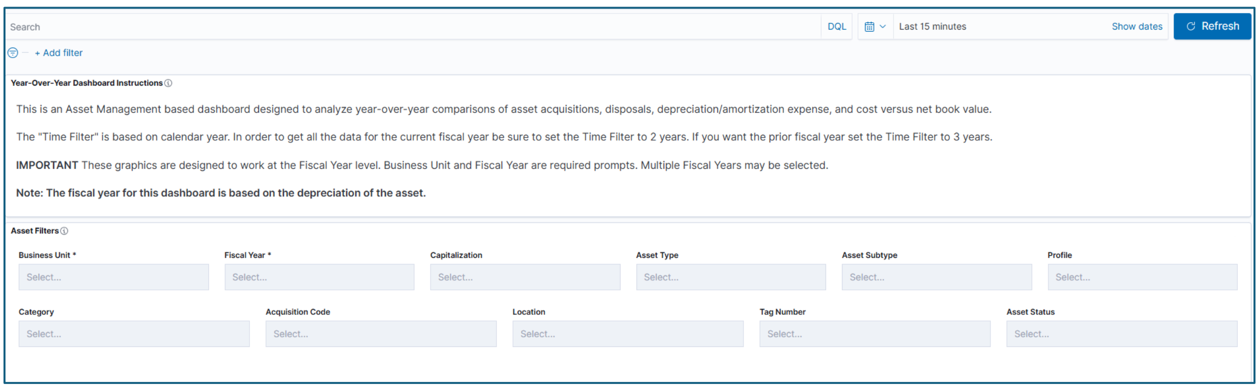
The visualizations and data displayed in this dashboard are based on values selected for the **Business Unit** and **Fiscal Year** filters, which are required. Current and previous **Fiscal Year** values are based on asset depreciation.

You can further filter visualizations and data based on other filters, such as **Capitalization, Profile** (Asset Profile), and more.

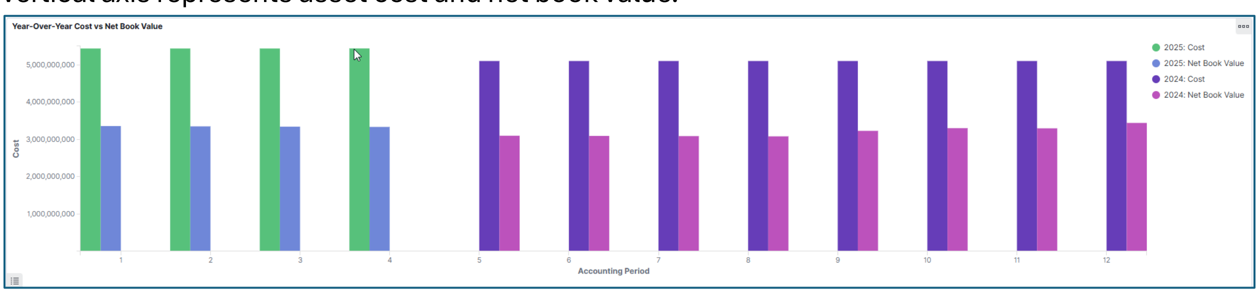
This dashboard contains the following visualizations:

Instructions*:* Provides instructional data specific to this dashboard.

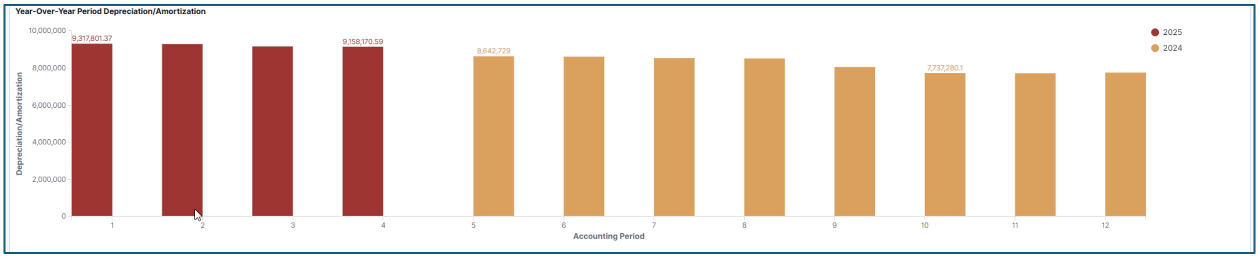
Asset Filters*:* Filters to refine dashboard data.



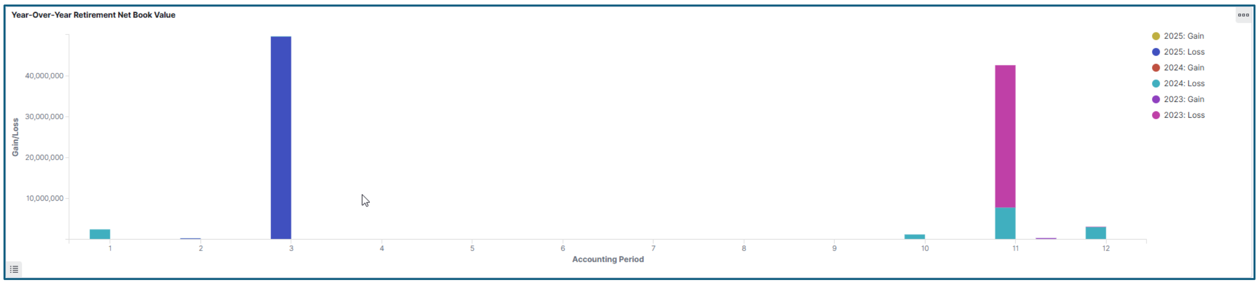
Year-Over-Year Cost vs Net Book Value: Provides a year-over-year comparison of asset cost and net book value by accounting period. The horizontal axis represents the accounting period, and the vertical axis represents asset cost and net book value.



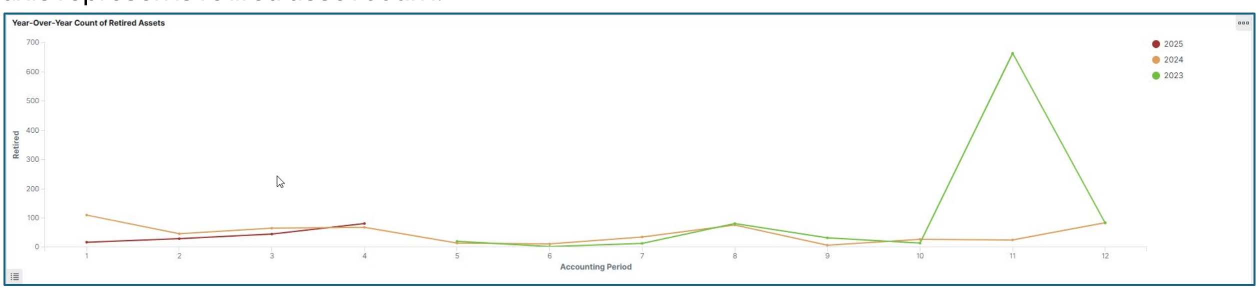
Year-Over-Year Period Depreciation/Amortization: Provides a year-over-year comparison of asset depreciation and amortization by accounting period. The horizontal axis represents the accounting period, and the vertical axis represents the depreciation and amortization amount.



Year-Over-Year Retirement Net Book Value: Provides a year-over-year comparison of asset retirement net book value, by accounting period. The horizontal axis represents the accounting period, and the vertical axis represents retirement gain or loss.



Year-Over-Year Count of Retired Assets: Provides a year-over-year comparison of retired asset count by accounting period. The horizontal axis represents the accounting period, and the vertical axis represents retired asset count.



Year-Over-Year Summary: Displays a summary of assets rolled up to Fiscal Year, Accounting Period, and Category.


Year-Over-Year Summary

Business Unit	Fiscal Year	Accounting Period	Category	Cost	Salvage	Period Depreciation/ Amortization	YTD Depreciation/ Amortization	LTD Depreciation/ Amortization	Net Book Value
	2023	3	Buildings	306,167,779.06	0	554,983.44	1,664,950.32	137,554,087.42	168,613,691.64
	2023	3	Construction in Progress	29,095,107.1	0	0	0	0	29,095,107.1
	2023	3	Furnishings and Equipment	24,521,043.83	0	52,761.72	161,595.88	22,597,186.89	1,923,856.94
	2023	3	Improvements Other than Bldgs	1,625,800.68	0	6,513.81	19,541.43	1,092,197.64	533,603.04
	2023	3	Intngbl Assts wDef Useful Life	67,455	0	0	0	67,455	0
	2023	3	Land	7,508,676	0	0	0	0	7,508,676
	2023	3	Library Resources	1,047,821.08	0	9,806.37	29,419.11	778,249.87	269,571.21
	2023	4	Buildings	306,167,779.06	0	554,983.44	2,219,933.76	138,109,070.86	168,058,708.2
	2023	4	Construction in Progress	29,095,107.1	0	0	0	0	29,095,107.1
	2023	4	Furnishings and Equipment	24,801,346.93	280,302.1	52,617.84	214,213.8	22,649,804.81	2,151,542.12
				118,473,894,313.49	**2,950,052.38**	**204,074,867.34**	**1,671,478,558.32**	**45,390,766,090.89**	**73,083,128,222.6**

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CTC Early Detection and Monitoring

The Early Detection and Monitoring dashboard provides the Accounts Payable Manager as well as the Cash Manager with a view of voucher activity.

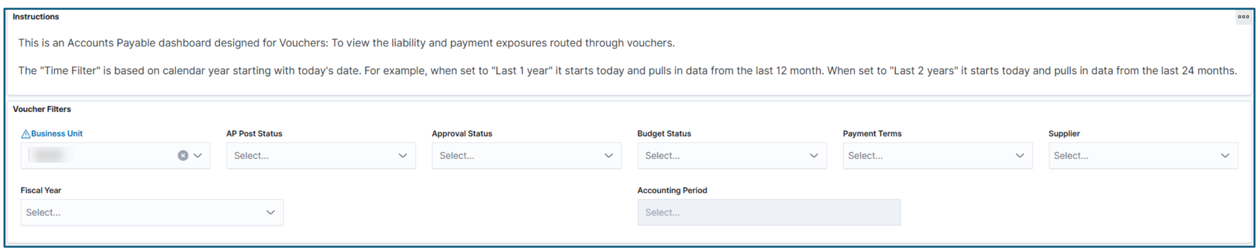
A few examples of actions you can take with the visualizations in the dashboard:

- Apply a filter to the data (like budget status)
- Apply multiple filters (like budget status AND payment terms)
- Change the date range by using the Time Filter and Fiscal Year/Accounting Period
- Drill to view the voucher in the Document Status page
- View the visualization full screen (and minimize back to normal)

This dashboard contains the following visualizations:

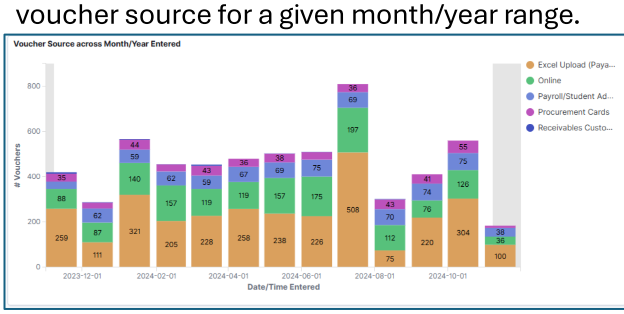
Instructions: Provides instructional data specific to this dashboard.

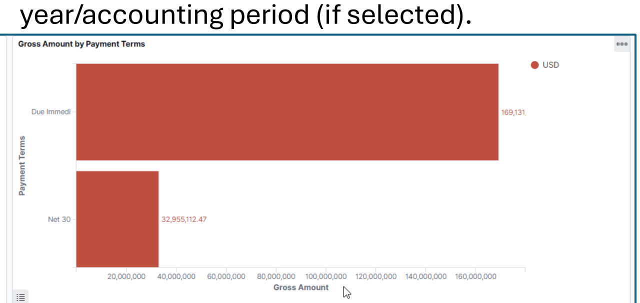
Voucher Filters: Filters to refine dashboard data.



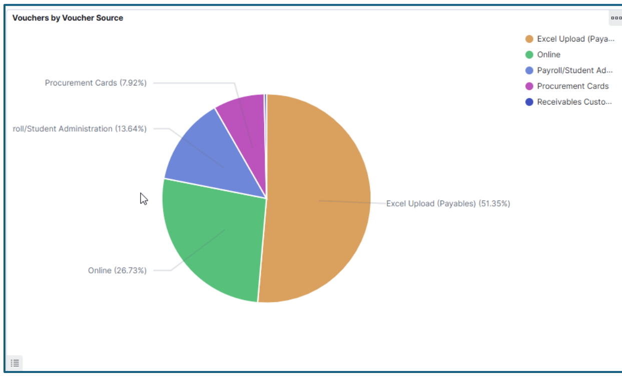
Voucher Source across Month/Year Entered: shows the number of vouchers by voucher source for a given month/year range.

Gross Amount by Payment Terms: shows the gross amount by payment terms for a given time range based on the time filter and fiscal year/accounting period (if selected).





Vouchers by Voucher Source: like Voucher Source across Month/Year entered managers can view the number of vouchers by source.



Supplier Summary: displays the top 10 Suppliers based on gross amount.

Supplier Summary

Supplier Name	Gross Amount	# Vouchers
US Bank National Assn	636,422.08	792
Seattle Colleges	6,620,821.11	192
WA ST Dept of Enterprise Services	4,491,044.24	167
WA ST Board for Comm and Tech Colleges	21,343,398.95	164
Clover Park Technical College	4,283,923.69	161
Green River College	3,725,917.54	117
Skagit Valley College	2,597,234.03	103
Community College of Spokane	8,441,199.21	101
Oregon Department of Revenue	52,563.51	97
Lake WA Institute of Technology	2,565,440.81	96
	202,086,440.52	**5,945**

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Voucher Detail: Displays a list of vouchers making up the data shown in the visualizations. Use the **Details** link to access the Voucher Summary page to view further details about the voucher.

Voucher Detail

Accounting Date	Business Unit	Voucher	Supplier	Voucher Source	Payment Terms	Details	Fiscal Year	Accounting Period	Gross Amount
Feb 4, 2024 @ 16:00:00.000	[illegible]	00022967	0000045007	ONL	Due Immedi	Details	2024	8	2,500
Dec 12, 2023 @ 16:00:00.000	[illegible]	00022319	0000045110	ONL	Net 30	Details	2024	6	150
Nov 4, 2024 @ 16:00:00.000	[illegible]	H0106687	0000045380	PAYR	Due Immedi	Details	2025	5	3,811.63
Oct 21, 2024 @ 17:00:00.000	[illegible]	H0105409	0000045380	PAYR	Due Immedi	Details	2025	4	3,783.4
Oct 6, 2024 @ 17:00:00.000	[illegible]	H0104109	0000045380	PAYR	Due Immedi	Details	2025	4	3,773.76
Sep 23, 2024 @ 17:00:00.000	[illegible]	H0101762	0000045380	PAYR	Due Immedi	Details	2025	3	3,773.66
Sep 8, 2024 @ 17:00:00.000	[illegible]	H0101732	0000045380	PAYR	Due Immedi	Details	2025	3	3,777.73
Aug 20, 2024 @ 17:00:00.000	[illegible]	H0100574	0000045380	PAYR	Due Immedi	Details	2025	2	3,777.31
Aug 5, 2024 @ 17:00:00.000	[illegible]	H0099397	0000045380	PAYR	Due Immedi	Details	2025	2	4,013.53
Jul 21, 2024 @ 17:00:00.000	[illegible]	H0098198	0000045380	PAYR	Due Immedi	Details	2025	1	3,995.61
									202,086,440.52

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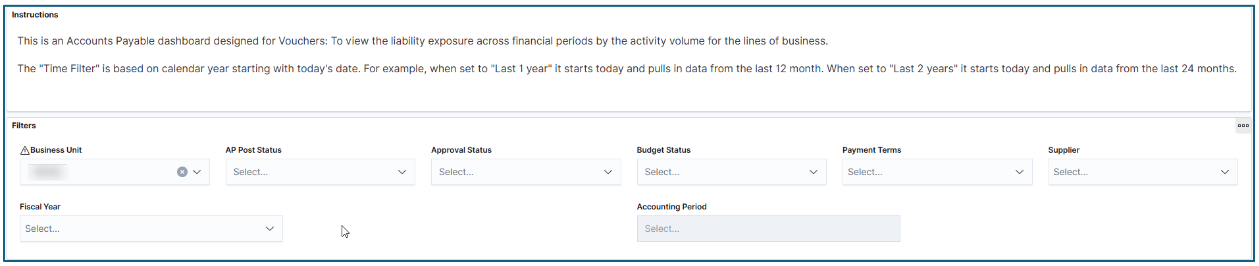
CTC Trend Analysis

The Trend Analysis dashboard provides the Accounts Payable Manager as well as the Cash Manager with a period based view into liability exposure across financial periods.

This dashboard contains the following visualizations:

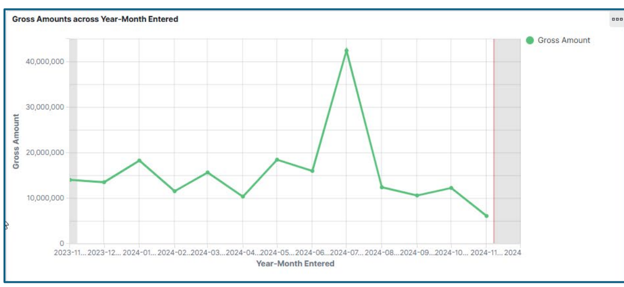
Instructions*:* Provides instructional data specific to this dashboard.

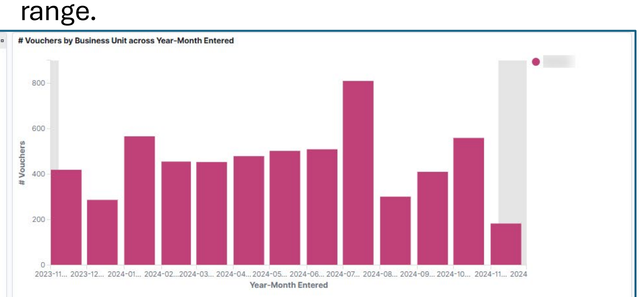
Filters*:* Filters to refine dashboard data.



Gross Amounts across Year-Month Entered: displays the gross number of vouchers over a given period range.

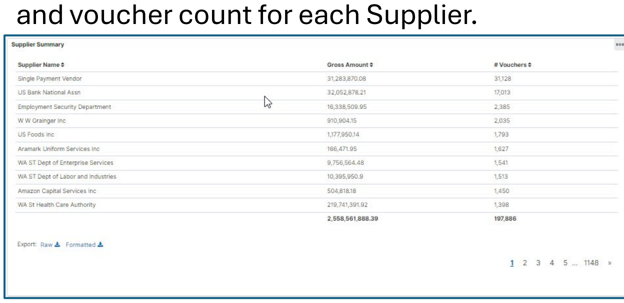
 # Vouchers by Business Unit across Year-Month Entered: displays the total number of vouchers by business unit over a given period range.





Supplier Summary: displays gross amount and voucher count for each Supplier.

Voucher Summary: displays gross amount by voucher source, payment terms, AP post status, approval status, and budget status.



Supplier Summary

Supplier Name	Gross Amount	# Vouchers
Single Payment Vendor	31,283,870.08	31,128
US Bank National Assn	32,052,878.21	17,013
Employment Security Department	16,338,509.95	2,385
W W Grainger Inc	910,904.15	2,035
US Foods Inc	1,177,950.14	1,793
Aramark Uniform Services Inc	166,471.95	1,627
WA ST Dept of Enterprise Services	9,756,564.48	1,541
WA ST Dept of Labor and Industries	10,395,950.9	1,513
Amazon Capital Services Inc	504,818.18	1,450
WA St Health Care Authority	219,741,391.92	1,398
	2,558,561,888.39	**197,886**

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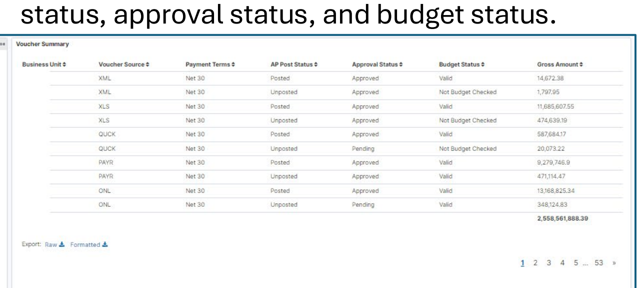

Voucher Summary

Business Unit	Voucher Source	Payment Terms	AP Post Status	Approval Status	Budget Status	Gross Amount
	XML	Net 30	Posted	Approved	Valid	14,672.38
	XML	Net 30	Unposted	Approved	Not Budget Checked	1,797.95
	XLS	Net 30	Posted	Approved	Valid	11,685,607.55
	XLS	Net 30	Unposted	Approved	Not Budget Checked	474,639.19
	QUCK	Net 30	Posted	Approved	Valid	587,684.17
	QUCK	Net 30	Unposted	Pending	Not Budget Checked	20,073.22
	PAYR	Net 30	Posted	Approved	Valid	9,279,746.9
	PAYR	Net 30	Unposted	Approved	Valid	471,114.47
	ONL	Net 30	Posted	Approved	Valid	13,168,825.34
	ONL	Net 30	Unposted	Pending	Valid	348,124.83
						2,558,561,888.39

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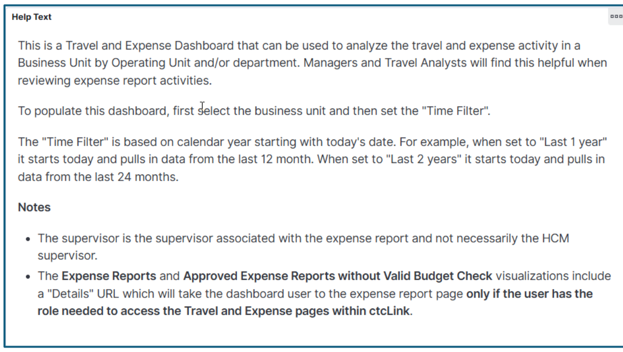
CTC Performance and Operations

This Dashboard can be used to analyze the travel and expense activity in a Business Unit by Operating Unit and/or department. Managers and Travel Analysts will find this helpful when reviewing expense report activities.

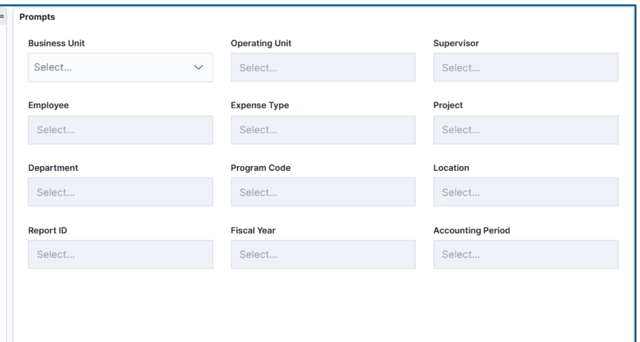
Please note that the supervisor associated with the employee on this dashboard is the supervisor associated with the expense report and not necessarily the same supervisor as shown in HCM.

This dashboard contains the following visualizations:

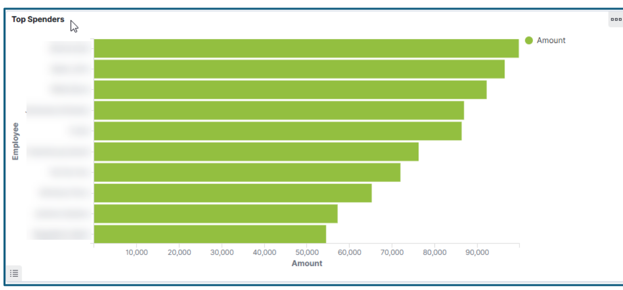
Help Text: Provides instructional data specific to this dashboard.



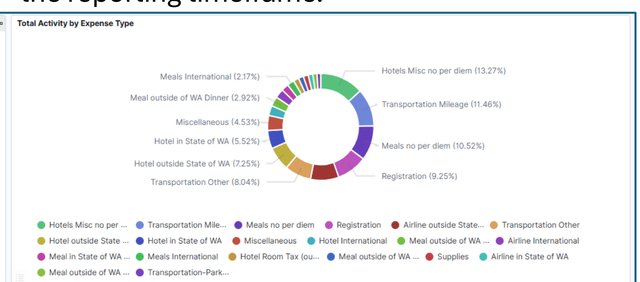
Prompts: Filters to refine dashboard data.



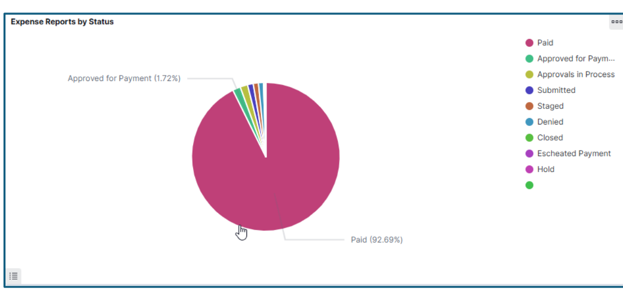
Top Spenders: Shows employees with the highest value Expense Reports for the reporting timeframe



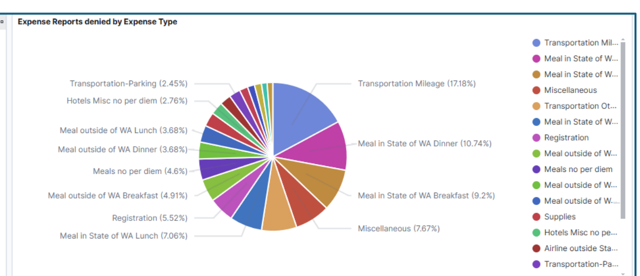
Total Activity by Expense Type: Shows the actual spending for various Expense Types such as Airfare, Hotels, Meals, and more within the reporting timeframe.



Expense Reports by Status: Shows the percentage of expense reports by status.



Expense Reports denied by Expense Type: Shows the percentage of expense reports denied by expense type.



Expense Reports: Displays a list of expense reports making up the data shown in the visualization. *Note: This visualization includes a "Details" link to the expense report page and will only work for employees who have the roles necessary to access the Travel and Expense pages within ctcLink.*

Expense Reports

Report ID	Link	Status	Employee	Location	Department	Project	Accounting Date	Fund	Approp Idx	Class	Fiscal Year	Accounting Period	Amount
0000069022	Details	Paid	[illegible]	Honolulu	11100		Jun 26, 2024 @ 17:00:00.000	001	EG1	411	2024	12	5,080.53
0000068123	Details	Paid	[illegible]	Honolulu	11100		Jun 3, 2024 @ 17:00:00.000	001	EG1	411	2024	12	4,406.05
0000070647	Details	Paid	[illegible]	Honolulu	32010		Jun 29, 2024 @ 17:00:00.000	08A	3BE	411	2024	12	2,338.72
0000070647	Details	Paid	[illegible]	Honolulu	32000		Jun 29, 2024 @ 17:00:00.000	08A	3E0	411	2024	12	1,992.27
0000069256	Details	Paid	[illegible]	Honolulu	11400		Jun 10, 2024 @ 17:00:00.000	001	101	411	2024	12	1,918.66
0000069256	Details	Paid	[illegible]	Honolulu	31010	0000006269	Jun 10, 2024 @ 17:00:00.000	145		411	2024	12	1,569.81
0000068451	Details	Paid	[illegible]	Honolulu	11400		Jun 5, 2024 @ 17:00:00.000	001	101	411	2024	12	1,885.53
0000068451	Details	Paid	[illegible]	Honolulu	31010	0000006269	Jun 5, 2024 @ 17:00:00.000	145		411	2024	12	1,542.72
0000068636	Details	Paid	[illegible]	Honolulu	11100		Jun 4, 2024 @ 17:00:00.000	24J	1A1	411	2024	12	2,883.95
0000055948	Details	Paid	[illegible]	New York City	10000		Nov 15, 2023 @ 16:00:00.000	148		411	2024	5	2,425.45
													462,056.88

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Approved Expense Reports without Valid Budget Check: Expense reports that have been approved for payment but do not have a valid budget check status.

Approved Expense Reports without Valid Budget Check

Budget Status	Name	Employee ID	Description	Report ID	Details	Accounting Date	Status	Amount
Not Budget Checked	[illegible]	101013609	HS/EHS	0000061112	Details	Jun 17, 2024 @ 17:00:00.000	Paid	144.72
Not Budget Checked	[illegible]	201044128	NAEOP Conference	0000075859	Details	Oct 20, 2024 @ 17:00:00.000	Approved for Payment	365
Not Budget Checked	[illegible]	201044128	NAEOP Conference	0000075859	Details	Oct 20, 2024 @ 17:00:00.000	Paid	1,937
Not Budget Checked	[illegible]	101047978	BIPOC Climb Night	0000059480	Details	Mar 26, 2024 @ 17:00:00.000	Paid	248.07
Not Budget Checked	[illegible]	101047978	Camping reservation Spring Qua	0000073753	Details	Sep 11, 2024 @ 17:00:00.000	Approved for Payment	147.66
Not Budget Checked	[illegible]	201042471	Vicinity Travel Summer Quarter	0000074793	Details	Oct 15, 2024 @ 17:00:00.000	Paid	137.35
Not Budget Checked	[illegible]	101028865	OCT CCEast Cash Count TA#27765	0000075560	Details	Oct 15, 2024 @ 17:00:00.000	Approved for Payment	53.47
Not Budget Checked	[illegible]	101010641	NWAC PRESENTATION LCC	0000060523	Details	Feb 27, 2024 @ 16:00:00.000	Paid	362.01
Not Budget Checked	[illegible]	201509185	Running Start Orientation	0000072593	Details	Sep 8, 2024 @ 17:00:00.000	Paid	49.58
Not Budget Checked	[illegible]	101061553	Petty Cash	0000050384	Details	Nov 7, 2023 @ 16:00:00.000	Paid	12.97
								34,762.13

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Dashboards – Phase 2

Product	Dashboard	Description	Role Needed	Companion Detail Query	Includes data not less than
General Ledger	CTC GL Financial Performance Analysis	Analyze the financial performance of a business on a yearly basis.	ZD Insights GL View Privilege	QFS_INS_GL_FINANCIAL_PRFRMNCE Folder: INSIGHTS	Fiscal Year 2023
General Ledger	CTC GL KK Budget Expense Revenue	Analyze departmental expense budgets.	ZD Insights GL View Privilege	QFS_INS_GLKK_BUD_EXP_REV Folder: INSIGHTS	Fiscal Year 2020
Grants	CTC Grant Cost Reimbursable Award Financials	Analyze the award and contract comparisons of cost, budget and billing by award, principal investigator, sponsor, project, contract type, award period, accounting year, and accounting period.	ZD Insights GM View Privilege	QFS_INS_GRNT_CST_RMBRS_AWD_FIN Folder: INSIGHTS	
		Data Table URL – link to Award Profile	ZD Grants Read Only Or ZZ Awards Processing		
Purchasing	CTC Purchasing Operations Dashboard	View the purchase order trend based on criteria such as, status, acknowledgement status, budget status, document tolerance status, and so on.	ZD Insights PO View Privilege	QFS_INS_PURCHASING_OPS Folder: INSIGHTS	
		Data Table URL – link to Add/Update POs.	ZD Accounts Payable Inquiry Or ZD Purchasing Inquiry Or ZD Purchasing Read Only Or ZZ Purchase Order Entry Or ZZ Purchasing Approval		
Purchasing	CTC Purchasing Requisitions Dashboard	View the requisition trend based on criteria such as, status, acknowledgement status, budget status, document tolerance status, and so on.	ZD Insights PO View Privilege	QFS_INS_PO_REQUISITIONS Folder: INSIGHTS	
		Data Table URL – link to Requisitions – Req Inquiry page.	ZD Purchasing Read Only Or ZZ Requisition Entry		

*Please note that the **Date Table URL** provides a link to a ctcLink page to which additional role access is required. This access is not provided with dashboard access.*

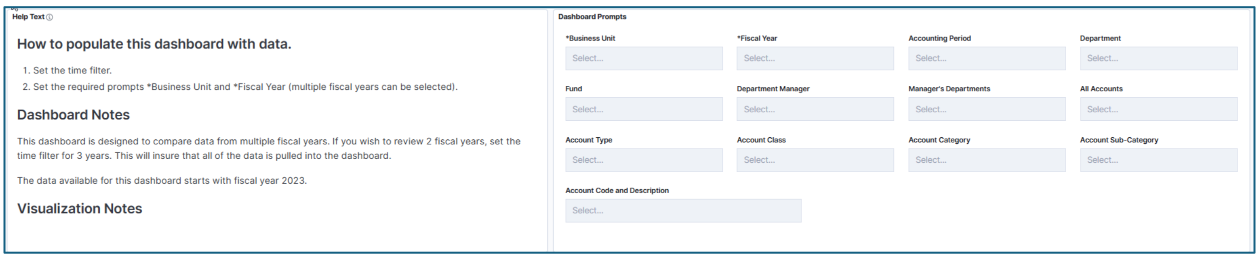
CTC GL Financial Performance Analysis

The CTC GL Financial Performance Analysis can be used to analyze the financial performance of a business unit on a yearly basis. You can compare the financial balances among the different fiscal years selected. You can also select an account or department for comparison. You can use the account hierarchy prompts to drill into transactions up to 5 levels for further analysis.

This dashboard contains the following visualizations:

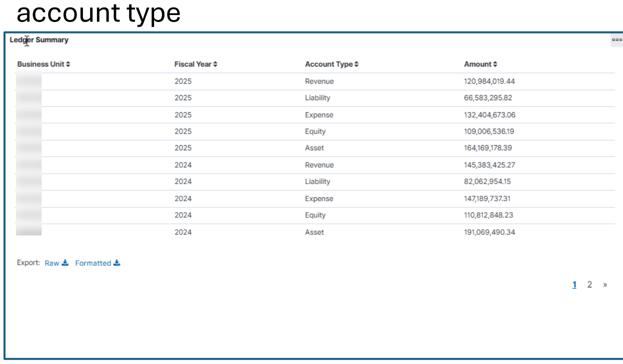
Help Text*:* Provides instructional data specific to this dashboard.

Dashboard Prompts*:* Prompts to refine dashboard data.



Ledger Summary: Displays summary information about the ledger data by the account type

YOY Comparison: Provides Year Over Year performance comparison for the selected Account Type and Fiscal Year.


Ledger Summary

Business Unit	Fiscal Year	Account Type	Amount
	2025	Revenue	120,984,019.44
	2025	Liability	66,583,295.82
	2025	Expense	132,404,673.06
	2025	Equity	109,006,536.19
	2025	Asset	164,169,178.39
	2024	Revenue	145,383,425.27
	2024	Liability	82,062,954.15
	2024	Expense	147,189,737.31
	2024	Equity	110,812,848.23
	2024	Asset	191,069,490.34

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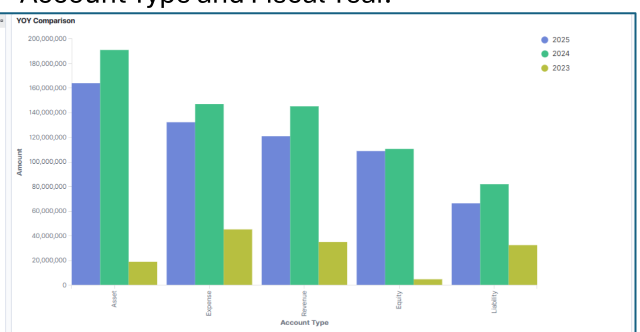
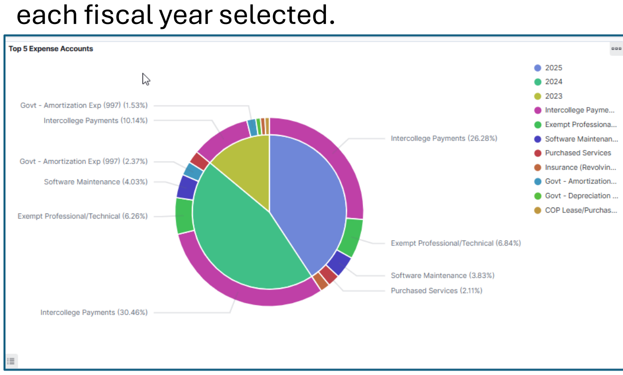
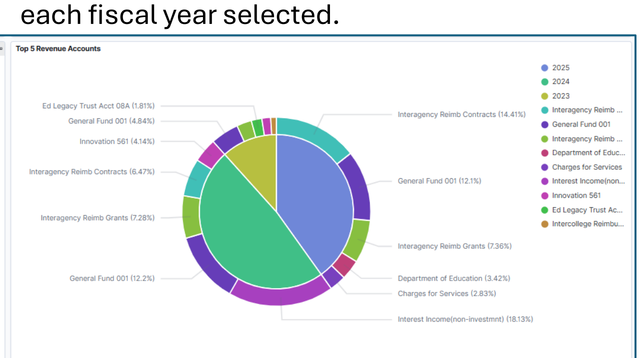


Top 5 Expense Accounts: Provides details about the top performing expense accounts in each fiscal year selected.

Top 5 Revenue Accounts: Provides details about the top performing revenue accounts in each fiscal year selected.





Ledger Details: Displays details about the ledger data selected on the dashboard in tabular format in sections divided by the account type.

Ledger Details

Asset: Account Type

Fiscal Year ⇕	Accounting Period ⇕	Department ⇕	Amount ⇕
2025	9	00100 - 1B00	[illegible]
2025	9	01303 - Suspense - Service Fees	[illegible]
2025	9	01310 - Central Accounting	[illegible]
2025	9	01400 - Unemployment Pool	[illegible]
2025	9	10000 - Board	[illegible]
2025	9	11000 - Executive Director	[illegible]
2025	9	11100 - DEI	[illegible]
2025	9	11400 - Tribal Governmental Affairs	[illegible]
2025	9	11500 - Strategic Initiatives	[illegible]
2025	9	12000 - Legislative	[illegible]
			[illegible]

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Equity: Account Type

Fiscal Year ⇕	Accounting Period ⇕	Department ⇕	Amount ⇕
2025	9	98479 - State Allocations	[illegible]
2025	8	98479 - State Allocations	[illegible]
2025	6	98479 - State Allocations	[illegible]
2025	4	98479 - State Allocations	[illegible]
2025	3	98479 - State Allocations	[illegible]
2025	2	98479 - State Allocations	[illegible]
2025	133	31035 - Bridge to College	[illegible]
2025	133	31090 - RESERVES - EDUCATION OTHER	[illegible]
2025	133	34010 - FEDERAL ABE	[illegible]
2025	133	34020 - Integr Eng Literacy & Civics	[illegible]
			[illegible]

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Expense: Account Type

Fiscal Year ⇕	Accounting Period ⇕	Department ⇕	Amount ⇕
2025	9	01303 - Suspense - Service Fees	[illegible]
2025	9	10000 - Board	[illegible]
2025	9	11000 - Executive Director	[illegible]
2025	9	11100 - DEI	[illegible]
2025	9	11400 - Tribal Governmental Affairs	[illegible]
2025	9	11500 - Strategic Initiatives	[illegible]
2025	9	12000 - Legislative	[illegible]
2025	9	12500 - fka WELA	[illegible]
2025	9	13000 - Communications	[illegible]
2025	9	13101 - Website Software	[illegible]
			[illegible]

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Liability: Account Type

Fiscal Year ⇕	Accounting Period ⇕	Department ⇕	Amount ⇕
2025	9	01303 - Suspense - Service Fees	[illegible]
2025	9	01400 - Unemployment Pool	[illegible]
2025	9	10000 - Board	[illegible]
2025	9	11000 - Executive Director	[illegible]
2025	9	11100 - DEI	[illegible]
2025	9	11400 - Tribal Governmental Affairs	[illegible]
2025	9	11500 - Strategic Initiatives	[illegible]
2025	9	12000 - Legislative	[illegible]
2025	9	12500 - fka WELA	[illegible]
2025	9	13000 - Communications	[illegible]
			[illegible]

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Revenue: Account Type

Fiscal Year ⇕	Accounting Period ⇕	Department ⇕	Amount ⇕
2025	9	10000 - Board	[illegible]
2025	9	11400 - Tribal Governmental Affairs	[illegible]
2025	9	14901 - WACTC Conference	[illegible]
2025	9	14902 - WACTC Treasury	[illegible]
2025	9	20001 - Reserve - Indirect	[illegible]
2025	9	26901 - HRMC	[illegible]
2025	9	31021 - Educ-Other Local	[illegible]
2025	9	31030 - OUTCOMES	[illegible]
2025	9	31035 - Bridge to College	[illegible]
2025	9	31090 - RESERVES - EDUCATION OTHER	[illegible]
			[illegible]

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CTC GL KK Budget Expense Revenue

The CTC GL KK Budget Expense Revenue dashboard can be used to analyze departmental expense budgets. The intended user for this dashboard is someone who is responsible for departmental budgets. You can use the account hierarchy prompts to drill into transactions up to 5 levels for further analysis.

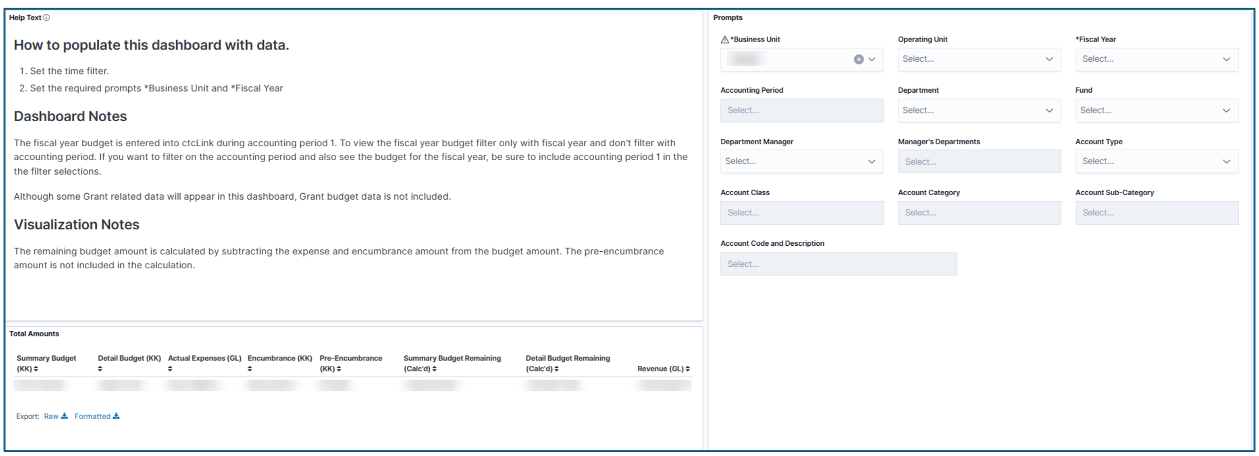
This dashboard combines data from General Ledger and Commitment Control. Budget, Encumbrance and Pre-Encumbrance data come from Commitment Control which is designated within the visualization with the column heading followed by (KK). Expenses and Revenue data come from General Ledger which is designated within the visualization with the column heading followed by (GL).

This dashboard contains the following visualizations:

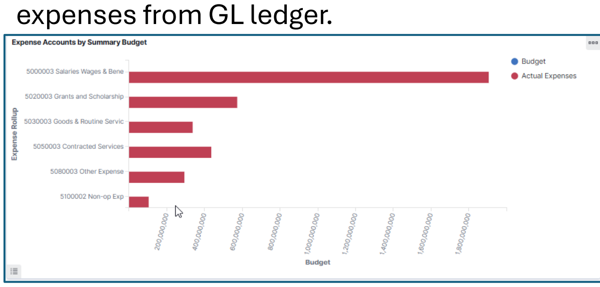
Help Text: Provides instructional data specific to this dashboard.

Prompts: Filters to refine dashboard data.

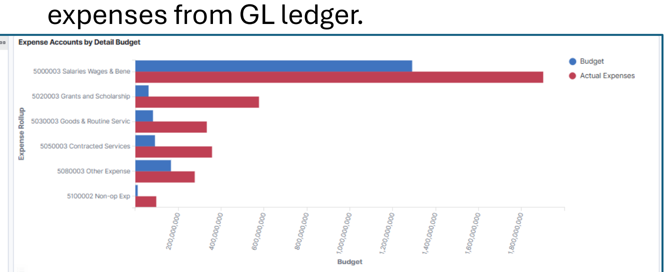
Total Amounts: Amount totals based on the prompted fiscal year and accounting periods (if selected).



Expense Accounts by Summary Budget: Shows budget from CC_SUM_BUD ledger and expenses from GL ledger.



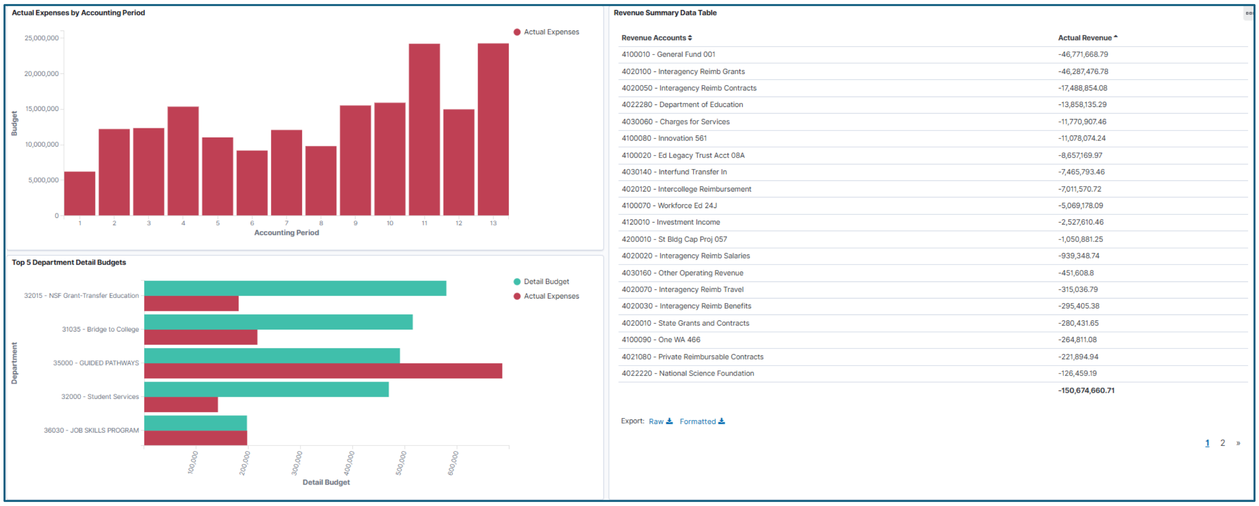
Expense Accounts by Detail Budget: Shows budget from CC_ORG_BUD ledger and expenses from GL ledger.



Actual Expense by Accounting Period: Shows expenses by fiscal year and accounting period.

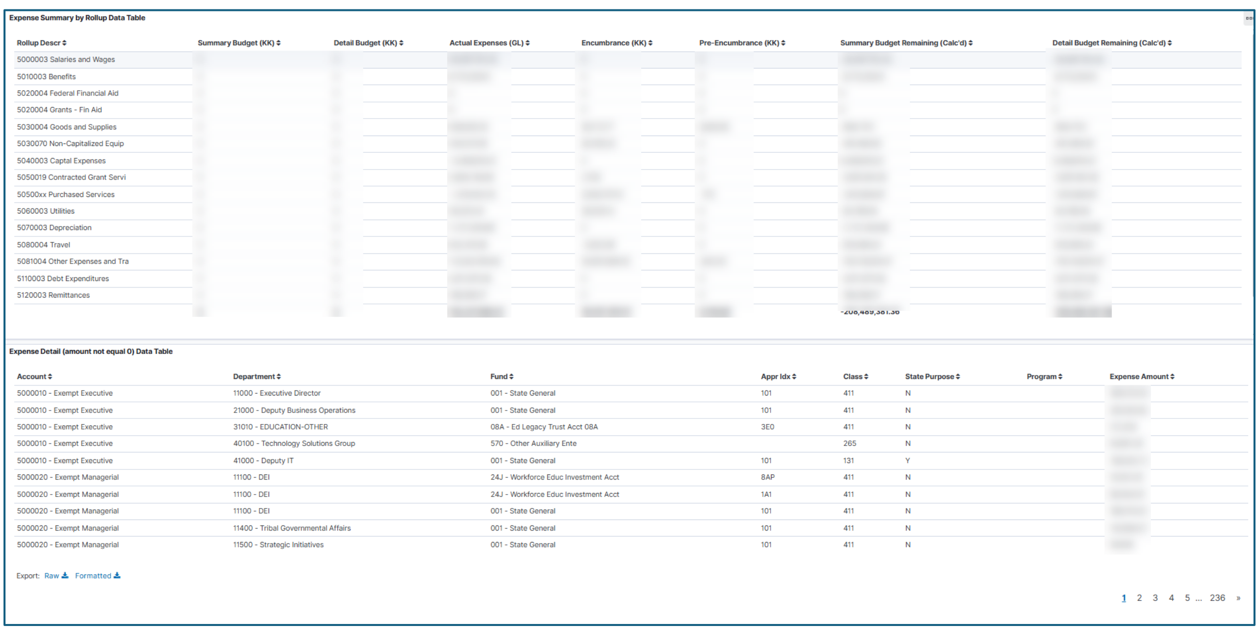
Revenue Summary Data Table*:* General Ledger revenue data by account code.

Top 5 Department Detail Budgets*:* Departments with the top 5 budgets from CC_ORG_BUD ledger.



Expense Summary by Rollup Data Table: GL expense data by expense roll-up accounts.

Expense Detail (amount not equal 0) Data Table*:* GL expense data detail.



CTC Grant Cost Reimbursable Award Financials

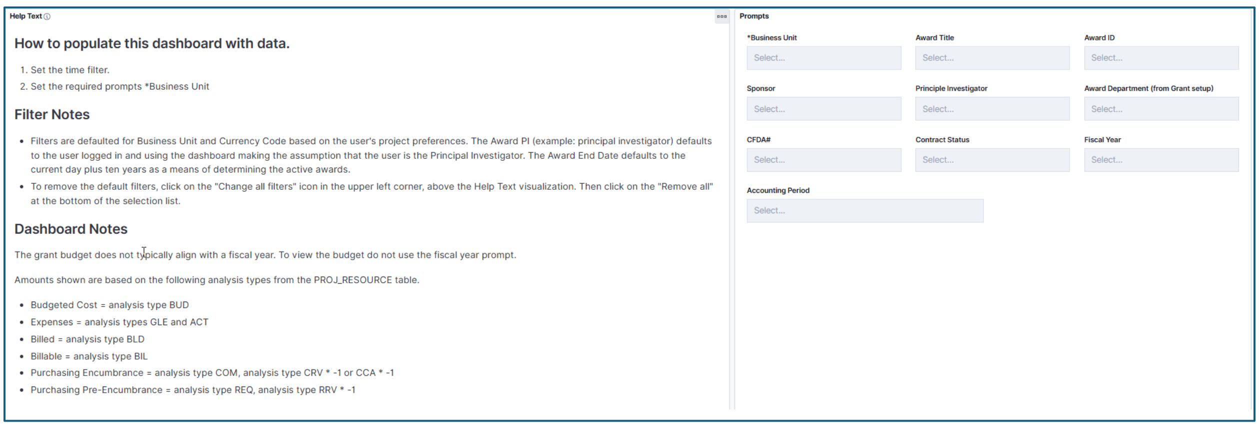
The CTC Grant Cost Reimbursable Award Financials dashboard can be used to analyze the award and contract comparisons of cost, budget and billing by award, principal investigator, sponsor, project, contract type, award period, accounting year, and accounting period.

Filters are defaulted based on the user's project preferences. The Award PI (example: principal investigator) defaults to the user logged in and using the dashboard making the assumption that the user is the Principal Investigator. The Award End Date defaults to the current day plus ten years as a means of determining the active awards.

This dashboard contains the following visualizations:

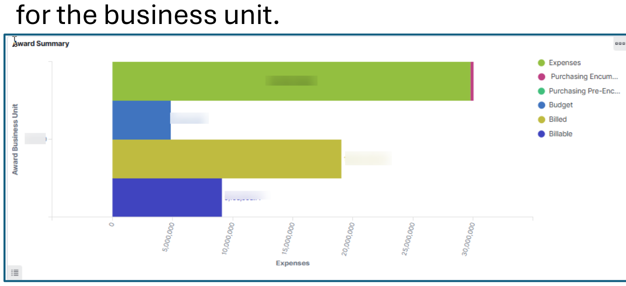
Help Text: Provides instructional data specific to this dashboard.

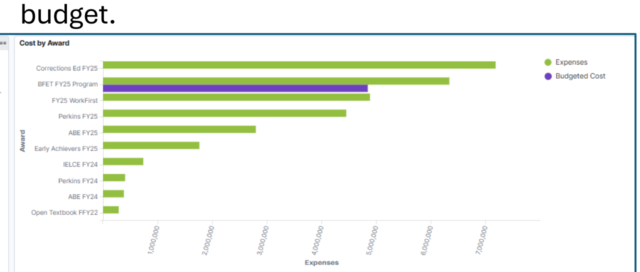
Prompts: Filters to refine dashboard data.



Award Summary: Summary of the top awards for the business unit.

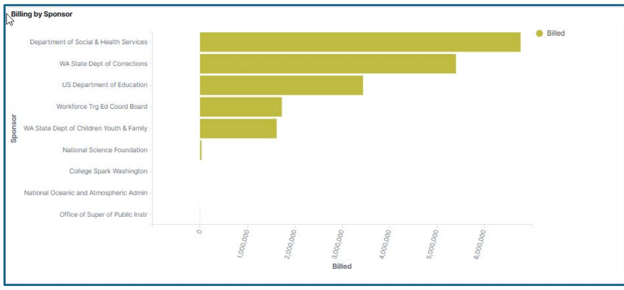
Cost by Award: Top 10 awards by expense and budget.

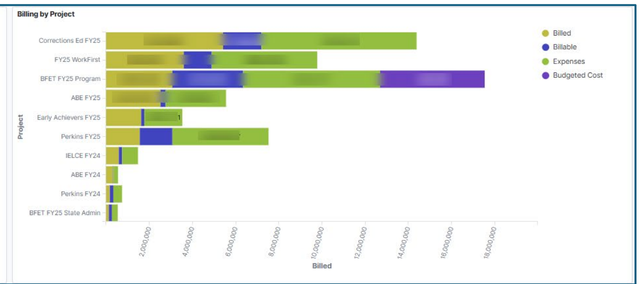




Billing by Sponsor: Top 10 sponsors by billing.

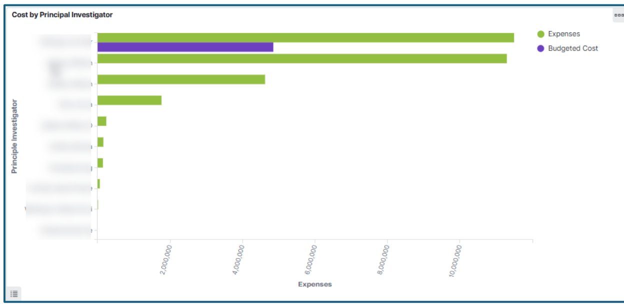
Billing by Project: Top 10 projects showing breakdown by amount categories.

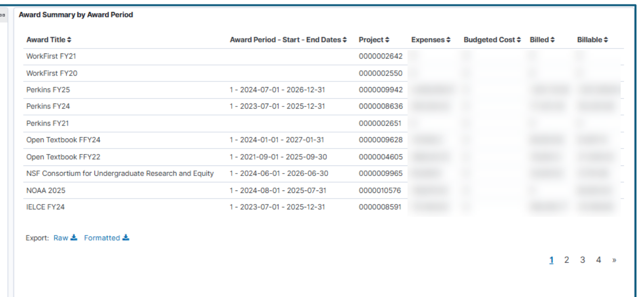




Cost by Principal Investigator: Top 10 principal investigators by cost.

Award Summary by Award Period: Displays a list of awards details including Award Period, Actual Cost, Budget, and Billing.




Award Summary by Award Period

Award Title	Award Period - Start - End Dates	Project	Expenses	Budgeted Cost	Billed	Billable
WorkFirst FY21		0000002642	[illegible]	[illegible]	[illegible]	[illegible]
WorkFirst FY20		0000002550	[illegible]	[illegible]	[illegible]	[illegible]
Perkins FY25	1 - 2024-07-01 - 2026-12-31	0000009942	[illegible]	[illegible]	[illegible]	[illegible]
Perkins FY24	1 - 2023-07-01 - 2025-12-31	0000008636	[illegible]	[illegible]	[illegible]	[illegible]
Perkins FY21		0000002651	[illegible]	[illegible]	[illegible]	[illegible]
Open Textbook FFY24	1 - 2024-01-01 - 2027-01-31	0000009628	[illegible]	[illegible]	[illegible]	[illegible]
Open Textbook FFY22	1 - 2021-09-01 - 2025-09-30	0000004605	[illegible]	[illegible]	[illegible]	[illegible]
NSF Consortium for Undergraduate Research and Equity	1 - 2024-06-01 - 2026-06-30	0000009965	[illegible]	[illegible]	[illegible]	[illegible]
NOAA 2025	1 - 2024-08-01 - 2025-07-31	0000010576	[illegible]	[illegible]	[illegible]	[illegible]
IELCE FY24	1 - 2023-07-01 - 2025-12-31	0000008591	[illegible]	[illegible]	[illegible]	[illegible]

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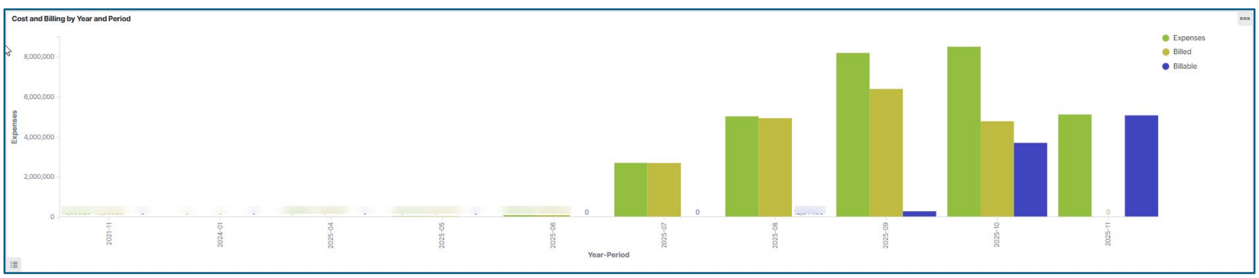
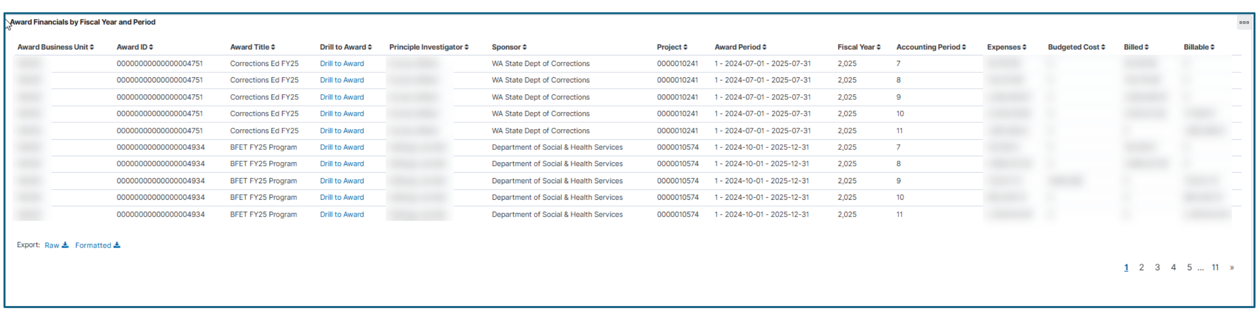
Cost and Billing by Year and Period: Expense, billed and billable amounts by year and period.



Award Financials by Fiscal Year and Period: Displays a list of awards based on Award Period, Fiscal Year, and Accounting Period. Click the **Drill to Award** link to navigate to the Award - Award Page.


Award Financials by Fiscal Year and Period

Award Business Unit	Award ID	Award Title	Drill to Award	Principle Investigator	Sponsor	Project	Award Period	Fiscal Year	Accounting Period	Expenses	Budgeted Cost	Billed	Billable
[illegible]	00000000000000004751	Corrections Ed FY25	Drill to Award	[illegible]	WA State Dept of Corrections	0000010241	1 - 2024-07-01 - 2025-07-31	2,025	7	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	00000000000000004751	Corrections Ed FY25	Drill to Award	[illegible]	WA State Dept of Corrections	0000010241	1 - 2024-07-01 - 2025-07-31	2,025	8	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	00000000000000004751	Corrections Ed FY25	Drill to Award	[illegible]	WA State Dept of Corrections	0000010241	1 - 2024-07-01 - 2025-07-31	2,025	9	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	00000000000000004751	Corrections Ed FY25	Drill to Award	[illegible]	WA State Dept of Corrections	0000010241	1 - 2024-07-01 - 2025-07-31	2,025	10	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	00000000000000004751	Corrections Ed FY25	Drill to Award	[illegible]	WA State Dept of Corrections	0000010241	1 - 2024-07-01 - 2025-07-31	2,025	11	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	00000000000000004934	BFET FY25 Program	Drill to Award	[illegible]	Department of Social & Health Services	0000010574	1 - 2024-10-01 - 2025-12-31	2,025	7	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	00000000000000004934	BFET FY25 Program	Drill to Award	[illegible]	Department of Social & Health Services	0000010574	1 - 2024-10-01 - 2025-12-31	2,025	8	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	00000000000000004934	BFET FY25 Program	Drill to Award	[illegible]	Department of Social & Health Services	0000010574	1 - 2024-10-01 - 2025-12-31	2,025	9	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	00000000000000004934	BFET FY25 Program	Drill to Award	[illegible]	Department of Social & Health Services	0000010574	1 - 2024-10-01 - 2025-12-31	2,025	10	[illegible]	[illegible]	[illegible]	[illegible]
[illegible]	00000000000000004934	BFET FY25 Program	Drill to Award	[illegible]	Department of Social & Health Services	0000010574	1 - 2024-10-01 - 2025-12-31	2,025	11	[illegible]	[illegible]	[illegible]	[illegible]

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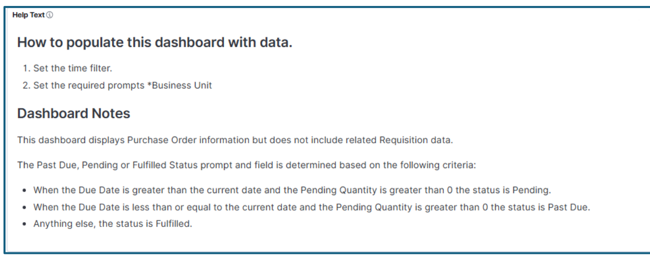
CTC Purchasing Operations Dashboard

The CTC Purchasing Operations Dashboard can be used to view the purchase order trend based on criteria such as, status, acknowledgement status, budget status, document tolerance status, and so on.

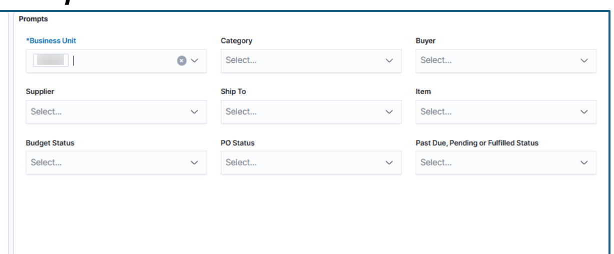
This dashboard helps buyers to analyze the current trend of purchase orders. You can apply different filters to modify data across all visualizations. Hover over different sections in the visualization to see the detailed statistics.

This dashboard contains the following visualizations:

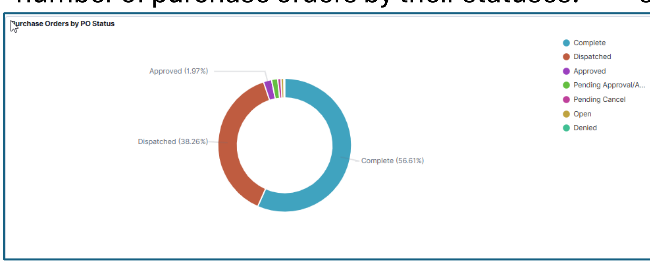
Help Text: Provides instructional data specific to this dashboard.



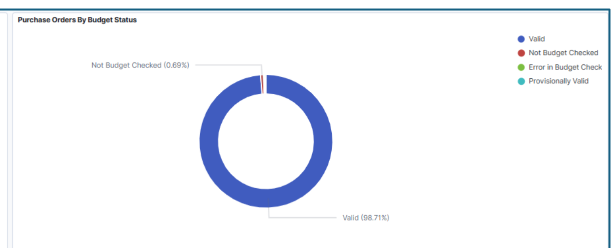
Prompts: Filters to refine dashboard data.



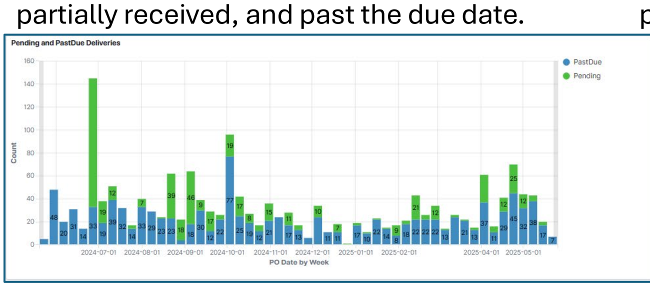
Purchase Orders by PO Status: Shows the number of purchase orders by their statuses.



Purchase Orders by Budget Status: Shows the number of purchase orders by their budget status.



Pending and Past Due Deliveries: Shows the number of purchase orders that are pending or past their delivery due date. The Pending bar represents the purchase orders that are open either partially or fully, but with a due date in the future. The Past Due bar represents those schedules that are either not yet received or partially received, and past the due date.



Purchase Orders by Period: Shows the number of purchase orders created over a time period based on the purchase order date.

Purchase Order Details: Displays a list of purchase orders and related details. Click the **View PO** link of a purchase order to view or modify its details.

Purchase Order Details

PO BU	PO ID	Line	Sch.	Buyer	Supplier	Due Date	Item Id	Item Descr	PO Qty	PO Status	Budget Status	PastDue / Pending / Fulfilled	Details	Merchandise Amount
[illegible]	0000005073	1	1	Emily Gerding	Shoreline Community College	2025-05-21		WACTC MAY 2025 registration. ACH PAYMENT TO SHORELINE COMMUNITY COLLEGE	1	Dispatched	Valid	PastDue	View PO	[illegible]
[illegible]	0000005072	1	1	Donald Laskey	Oracle America Inc	2025-05-21		Oracle Enterprise Performance Management Enterprise Cloud Service - Hosted Named User coverage: 6/2/2026 - 2/1/2029	1	Pending Approval/Approved	Provisionally Valid	PastDue	View PO	[illegible]
[illegible]	0000005072	2	1	Donald Laskey	Oracle America Inc	2025-05-21		Oracle Additional Application for Oracle Enterprise Performance Management Enterprise Cloud Service - Hosted Environment coverage: 6/2/2025 - 2/1/2029 see attached for full breakdown	1	Pending Approval/Approved	Provisionally Valid	PastDue	View PO	[illegible]
[illegible]	0000005071	1	1	Donnie McNamara	WA ST Dept of Enterprise Services	2025-05-21		DES MP-Apr25-Inv#81175354	1	Pending Approval/Approved	Provisionally Valid	PastDue	View PO	[illegible]
[illegible]	0000005070	1	1	Emily Gerding	US Bank National Assn	2025-05-20		5.9.25 CCRS Spring Retreat @ TCC	1	Dispatched	Valid	PastDue	View PO	[illegible]
[illegible]	0000005066	1	1	Donald Laskey	College Aid Services LLC	2025-05-20		Compliance billing period: 5/3/2025 - 5/16/2025 Support Services	1	Pending Approval/Approved	Valid	PastDue	View PO	[illegible]
[illegible]	0000005064	1	1	Donald Laskey	Asana Inc	2025-05-20		Asana renewal coverage: 5/11/2025 - 5/10/2026	1	Hold	Not Budget Checked	PastDue	View PO	[illegible]
[illegible]	0000005063	1	1	Emily Gerding	US Bank National Assn	2025-05-19		Office Depot Business - general supplies to include copy paper, notebooks, packing tape, file folders, and all other general office supplies	1	Pending Approval/Approved	Valid	PastDue	View PO	[illegible]
[illegible]	0000005063	2	1	Emily Gerding	US Bank National Assn	2025-05-19		Amazon - Office supplies not meeting agency needs from odp	1	Pending Approval/Approved	Valid	PastDue	View PO	[illegible]
[illegible]	0000005063	3	1	Emily Gerding	US Bank National Assn	2025-05-19		Express Name Tags & More for magnetic badging (photo/name tag)	1	Pending Approval/Approved	Valid	PastDue	View PO	[illegible]

Export: Raw Formatted

1 2 3 4 5 ... 196 »

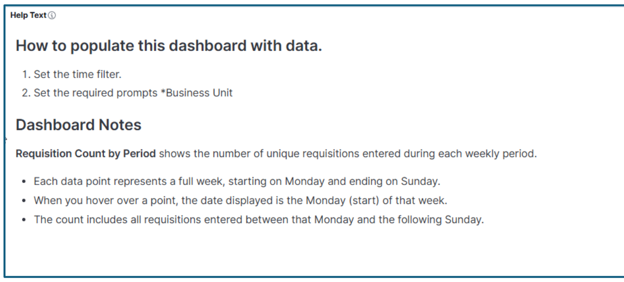
CTC Purchasing Requisitions Dashboard

The CTC Purchasing Requisitions Dashboard can be used to view the requisition trend based on criteria such as, requisition status, budget status, PO status, and so on.

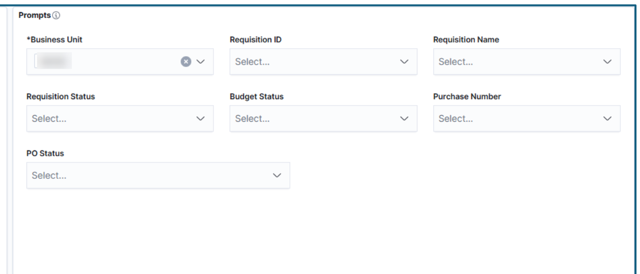
This dashboard helps buyers to analyze the current trend of requisitions. You can apply different filters to modify data across all visualizations. Hover over different sections in the visualization to see the detailed statistics.

This dashboard contains the following visualizations:

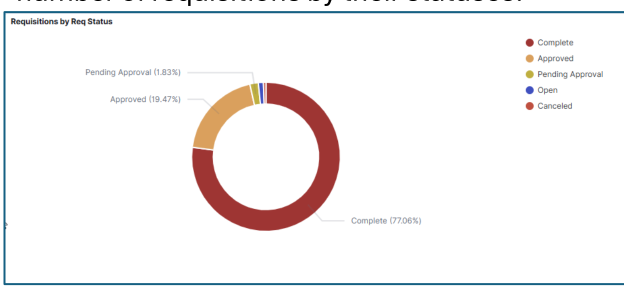
Help Text: Provides instructional data specific to this dashboard.



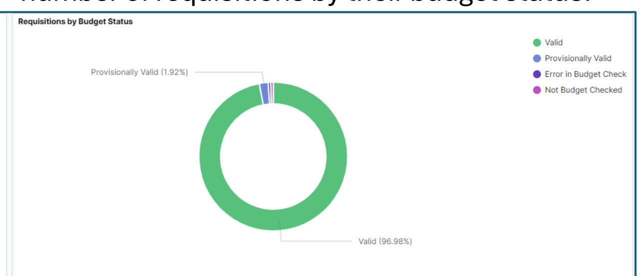
Prompts: Filters to refine dashboard data.



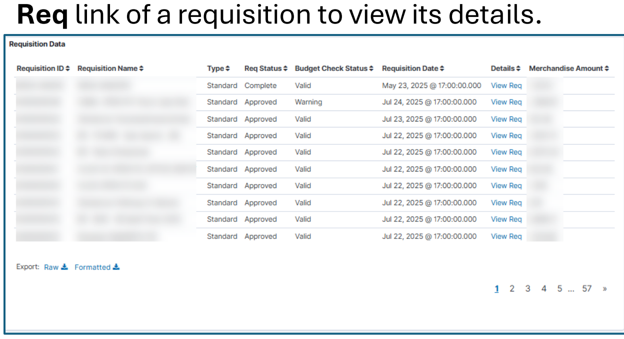
Requisitions by Req Status: Shows the number of requisitions by their statuses.



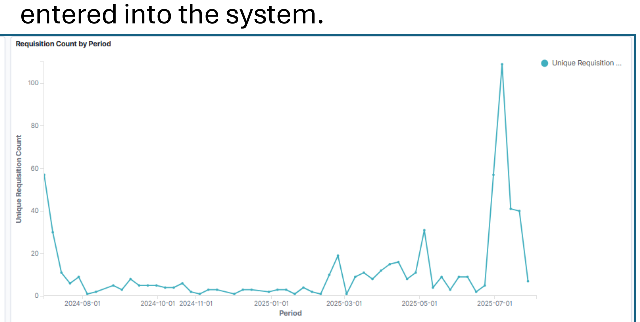
Requisitions by Budget Status: Shows the number of requisitions by their budget status.



Requisition Data: Displays a list of requisitions and related details. Click the **View Req** link of a requisition to view its details.



Requisition Count by Period: Shows the number of requisitions created over a time period based on the date the requisition was entered into the system.



Dashboard Tips

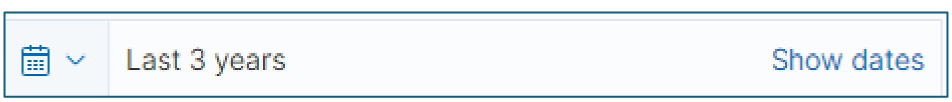
Adding a Dashboard Tile to Your Homepage

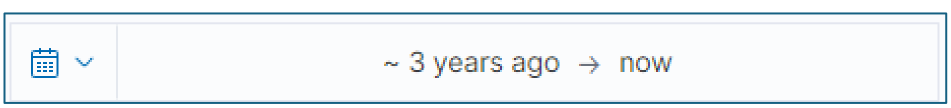
1. Navigate to the homepage you wish to customize.
2. Click the Homepage Actions icon (three dots) in the top-right corner and select Personalize Homepage.
3. Click the Add Tile button.
4. Find your tile by either:
    a. Searching: Enter the name or partial name of the tile in the search box.
    b. Browsing: Navigate through the folders (e.g., PeopleSoft Applications) to find the desired content.
5. Select the tile to add it to your homepage. It will typically appear at the end of your existing tiles.
    a. (Optional) Reposition the tile by dragging and dropping it to your preferred location.
6. Click Save in the upper-right corner to apply the changes.

This video demonstrates how to personalize your PeopleSoft homepage and add new tiles: https://youtu.be/gZrVAUAamho

Time Filter

The time filter displays data within a specified time range. The most common time range will start with the current date and then go back in time for the specified range. The time filter will bring in all data for the specified time range. For example, if the time filter is set to **Last 3 years** this means that the data displayed on the dashboard is from 3 years ago up to the current date.

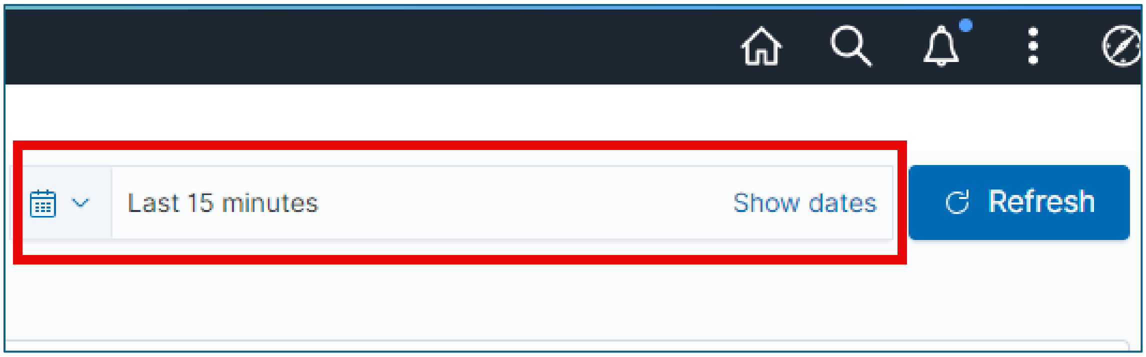




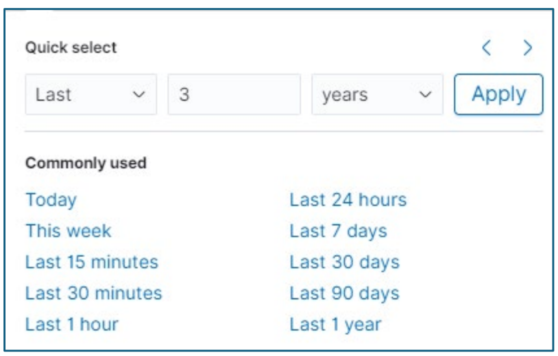
Some dashboards will include additional time related filters in the dashboard filter section. These time related filters, such as fiscal year and accounting periods, can be used to further refine the data to specific time periods.

Set the Time Filter

To populate the dashboard with data you must first update the time filter which is found at the top right side of the dashboard. The time filter defaults to **Last 15 minutes** each time the dashboard is opened.

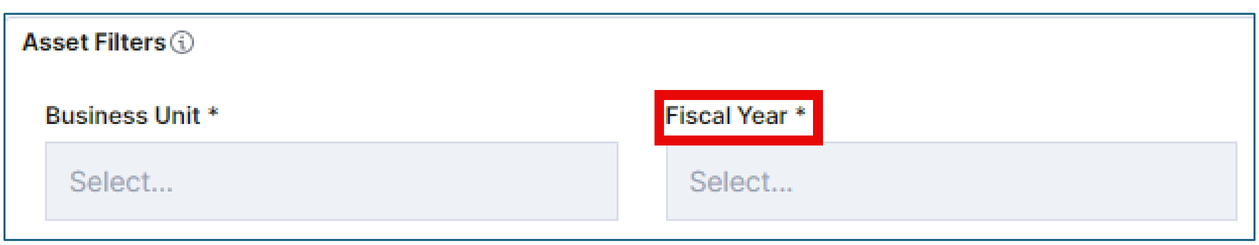


Click on the calendar icon to open the **Quick select** pop-up (shown below). Hover to the right of number **15** toward the word **minutes** until you get the double arrow icon. Change the **15** to **2**. Click on the drop-down to the right of **minutes**. Select **years.** Click the **Apply** button. You have now set the time filter to **2 years**.



Time Filter and Fiscal Year

As indicated above, the time filter is based on a calendar year starting with the current date and going back from that point. When a dashboard filter section includes a fiscal year filter, it will be important to set the time filter to bring in all the data for the fiscal year.



For example, you want to see all the data for fiscal year 2024 but we are in the 2nd accounting period of fiscal year 2025. You should set the time filter for 2 years of data and then select 2024 from the fiscal year filter.

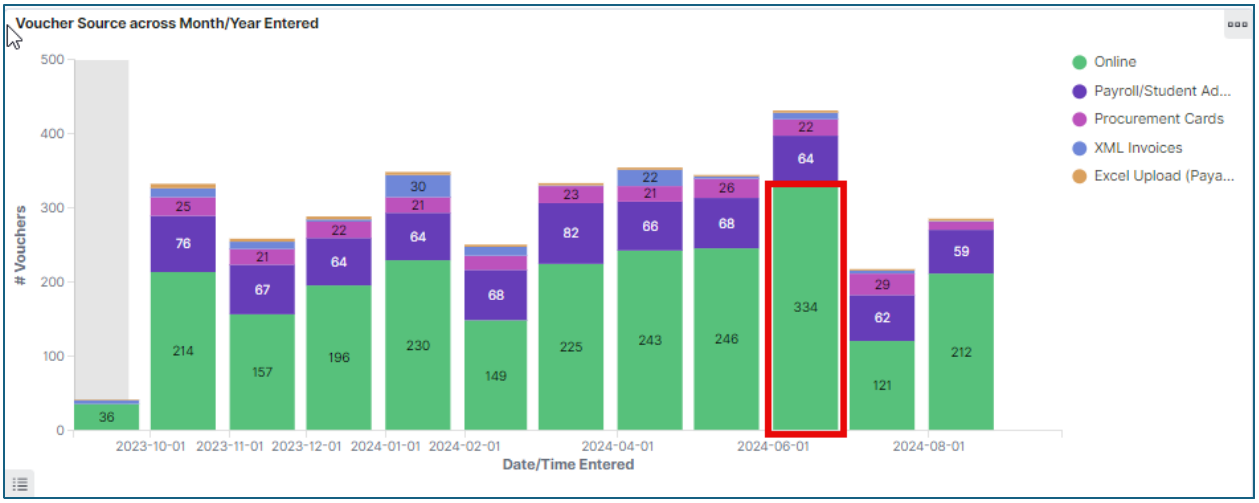
Fiscal Year	Time Filter
2025	1 year
2024	2 years
2023	3 years

	2022	4 years
	2021	5 years
	2020	6 years

A good rule of thumb is to add one year to the time filter for each prior fiscal year you want to review.

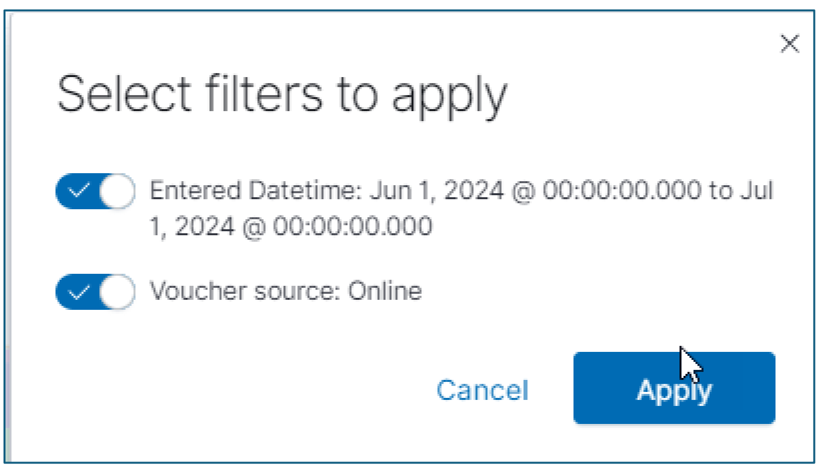
Other ways to Apply Filters

There are several ways to apply filters; the easiest is to select what you are interested in. In some cases, what you have selected represents more than one filter; and in this case you can select / unselect from a list before applying the filter(s).



When the green section of the bar above is selected it represents two filters, entered date/time and voucher source.

The list of the 2 filters is presented as selected:



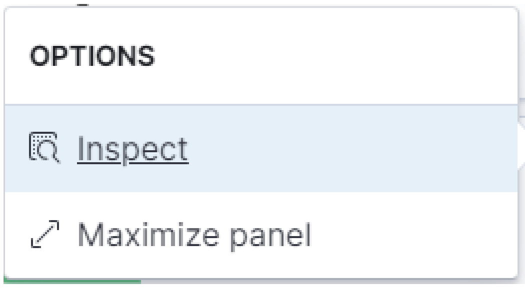
Select **Apply** to add both filters – a filter on entered date/time and a filter on voucher source; or unselect for just one filter.

To reset the dashboard to the previous settings, reset the time filter and the dashboard filters.

Inspect – Visualization Drill Down

Each visualization can be viewed separately on a full screen. You can also drill down for more information using the **Inspect** option. That data can be downloaded as a comma separated value (CSV) file.

Hover your cursor over the right hand upper corner of the visualization. Click on the  image. You will see the following pop-up. Click on **Inspect** drill down for more information. Click on **Maximize panel** to view the visualization as a full screen.



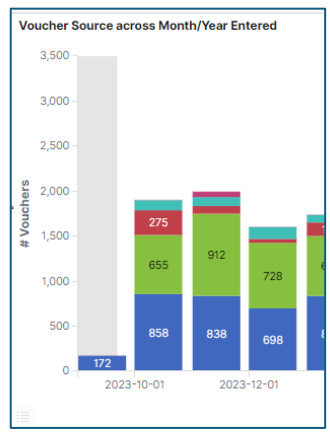
Potential Issues

Gray Bar – Partial Data Indictor

If a bar chart includes a gray bar, this indicates that only a portion of the data for that time-period has been included.

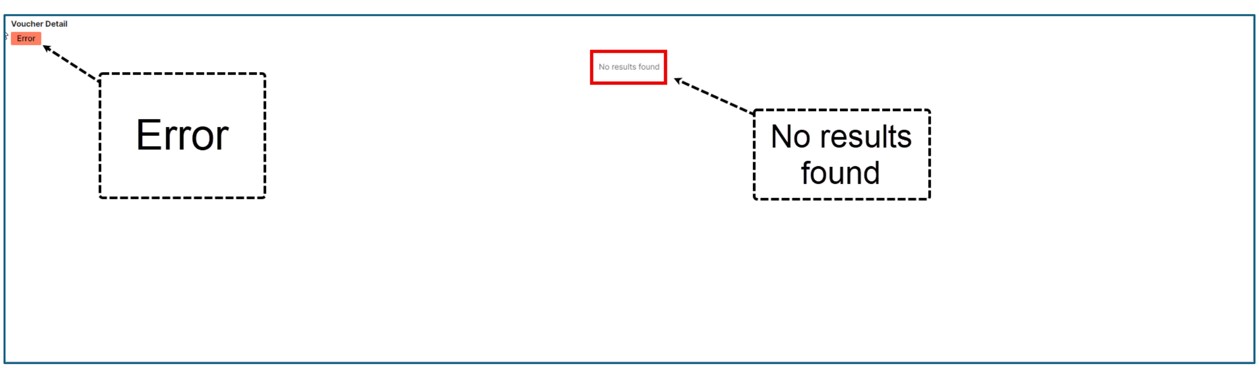
When you hover over the gray bar, the following message will appear, “This area may contain partial data. The selected time range does not fully cover it.”

Adjust the time filter at the top of the dashboard to include more data.



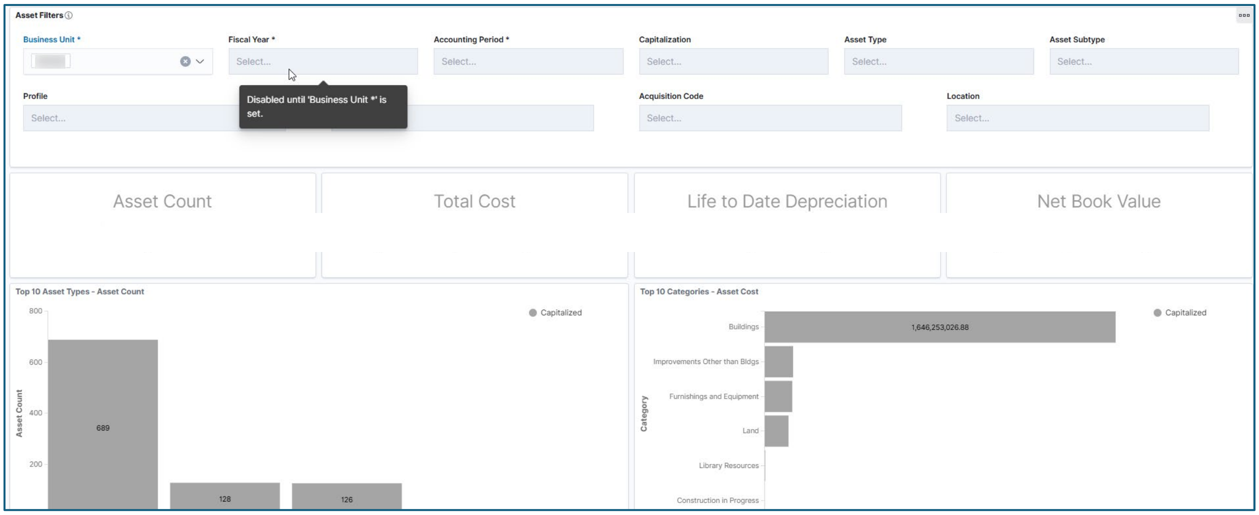
Data Table Error – No Results Found

This error will occur when there is too much data for the data table to display. Adjust the time filter to bring in less data into the dashboard. The best option is to set the time filter to 1 year unless working with a multiple year dashboard such as Year-Over-Year or Trend Analysis.

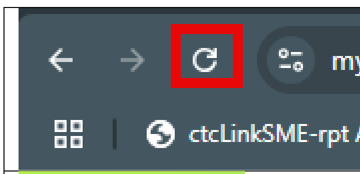
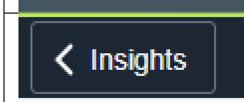


Dashboard is Gray and Freezes

The dashboard freezes and charts only display gray color. Filter will show a "disabled" message when the mouse is hovered over the filter.



Try the following steps to reactivate the dashboard. **Be sure to load only 1 years' worth of data to the time filter.**

	Step 1 - Reload the webpage by clicking on the "Reload this page" indicator. If that doesn't work …
	Step 2 – Return to your homepage, wait for the dashboard tile reload then click on the tile to go back to the dashboard.

Prompt Fields Show Wrong Values

The Business Unit prompt dropdown shows the wrong business unit.

This can be caused when the cache has not cleared correctly.

Click in the circling arrow in the upper left corner of the browser. This will refresh the page.

This will reload the data being used by the page which should refresh the prompt values.