

Guide to Selecting a Financial Report or Tool

TASK OR REPORTING NEED	Native Banner	ExpressLane	ODS-Discoverer	Finance Dashboard	Other or How To Info
PAYROLL					
Compare actual pay equal to budgeted amounts		Position Budget Report	Activity by Month for Div/Dept/Activity Unit	Payroll gauge or graph	IC Website LINKS: ODS 3.0 and Position Budget Report
Look up payroll information:	NHIDIST	Position Budget Report			IC Website LINK: Position Budget Report
- by entire FOAP or any combination of elements	NHIDIST	Position Budget Report (Org lookup only)	Activity by Month for Div/Dept/Activity Unit (Fund/Org lookup only)		IC Website LINKS: ODS 3.0 and Position Budget Report
- by Position and/or suffix (ex: backfill)	NHIDIST	Position Budget Report			IC Website LINK: Position Budget Report
- by date range or pay period for all or select individuals	NHIDIST				
- by L No or Name, and/or restrict data according to:	NHIDIST	Position Budget Report			
-- Pay event: People information: NHIDIST Financial Information: ODS	NHIDIST		Activity by Month for Div/Dept/Activity Unit (monthly postings)		IC Website LINK: ODS 3.0
-- Rule Class (i.e. no OPE or OPE only)	NHIDIST				
-- Earnings code (i.e. sick time)	NHIDIST				
-- so much more!	NHIDIST				
Lookup overall % of PR budget spent to date for Dept. Compare budget to actual - forecasting tool		Position Budget Report		Payroll gauge or graph	IC Website LINKS: Finance Dashboard and Position Budget Report
BUDGET					
Identify actual transaction FOAPs associated with their budget FOAPs		Revenue and Expenditure Report "Get Actual"			IC Website LINK: Finance For ExpressLane
Transfer Budget within your authority and same sub-fund:					
- from one FOAP to another		Budget Transfer			IC Website LINK: Finance For ExpressLane
- from one or more FOAPs to one or more FOAPs		Multiple Line Budget Transfer			IC Website LINK: Finance For ExpressLane
Transfer budget from one fund to another or outside your authority					E-mail BudgetTransfer@lanecc.edu

Guide to Selecting a Financial Report or Tool

TASK OR REPORTING NEED	Native Banner	ExpressLane	ODS-Discoverer	Finance Dashboard	Other or How To Info
Determine how much budget is left in a FOAP		Budget Availability			
Lookup why a FOAP is NSF when there "should" be funds available		Budget Availability: View Unposted Details			
ACTUAL AMOUNTS					
Assess Overall Financial Health of a Department or Division at a high level				Compare Budget to Actual and/or Revenue minus	IC Website LINK: Finance Dashboard
Review documents posted monthly to Org			Activity by Month for Div/Dept/Activity Unit		IC Website LINK: ODS 3.0
Report or Lookup Incomplete Documents	FOIDOCH				How to: ExpressLane Finance: Finance User Documents
Look up Document History	FOIDOCH	View Documents			
Look up Document Approval	FOIAPHT or FOIAPPH	View Documents > Approval History			
Purchase Orders:					
- Create	FPAPURR				How to: ExpressLane Finance: Finance User Documents
- Print PO	FPAPORD				
- Print Change Order	FPACORD				
- Make changes to In-Process PO	FPAPURR				
- Make changes to Completed PO	FPACHAR				
- Look up details, including payment		View documents			
- Look up open Grant Purchase Orders	by Vendor: FPIOPOV		by PO Number, FOAP, Vendor, User ID...FGY0210		
- Look up open Purchase Orders	by Vendor: FPIOPOV		by PO#: FDY0210 by FY: FFY0210		
- Generate a Report of Purchase Order Activity by Date Range, User ID and/or Vendor ID	FPRPURA				
Report or view department spending	FGIBSUM		Activity by Month for Div/Dept/Activity Unit	Examine trend on graph at bottom	
Report Budget, Current Period and YTD activity by Fiscal Period	FGRBDSC	Budget Query	Activity by Month for Div/Dept/Activity Unit		
Lookup YTD Budget, Actual, Encumbrances and Available Balance	FGIBDSR	Budget Query Revenue and Expense Summary Report			
Find FOAP Hierarchy Reports - where %%% = FUN, ORG, ACT or PRG for Fund, Org, Account & Program respectively. Example: Account = FGRACTH	FGR%%H	HOW TO RUN: Finance User Docs			POSTED REPORTS: www.lanec.edu/ic