P-Card Dashboard FAQ

Is there a way to save a custom view of the dashboard so I don't have to reset my filters each time I open the dashboard?
If there is one set of filtering that you find yourself going back to time after time, it will be beneficial for you to set up a custom view. In order to do this, simply select "Remember My Changes" in the upper left of the dashboard, and choose a name for the selection of data that you are viewing. After saving the view and checking "Make it My Default", you will be able to come back to the dashboard later, and it will apply the filters that you had selected immediately.

Can I receive an email that shows me my dashboard data on a regular basis?
You can also subscribe through email, and Tableau will send you a scheduled image of the dashboard. This could be useful for a quick view of one specific selection. In order to do this, simply click the envelope icon in the top right, enter your email address and desired time, and click subscribe.

Oops, I think I messed up. What now?
If you have been using filters, actions, or just clicking around and you lose track of what data you are viewing, simply click the "Revert" button at the top of the page. This will remove all filters and actions, giving you a clean slate.

Are there other pages in the dashboard that I can look at?
For the most detailed information about ERs, cardholders, or vendors, use the tooltip menus (they appear when you hover over a line of information) to access the drilldown links. If you would like to go directly to one of these sections without going through the home page, select "P-Card Dashboard" section of the file path in the upper left hand corner, and it will take you to a menu where you can select the home page or any of the drilldown pages directly.

How do I export this data?
There are a couple of choices when it comes to exporting data from Tableau. If the need arises to show someone the data that you're viewing in the dashboard, and you don't want to have to replicate all of the filtering and actions that you have performed in order to share what you're seeing, simply click the "Download" icon and then select "PDF". This will allow you to create a pdf file of the data exactly as you see it, so that you can easily email or save it (please do not allow any individuals without the proper access to view these exports).

If you would like to export a certain portion of the data into excel, select the portion of the dashboard that you would like to export, click the download icon, and select "Crosstab". A dialogue box will appear that alerts you that the crosstab has been created, select download, and open the file from your downloads folder.

What if I want the Dashboard to do something else?
ADS, Procurement, and Finance Infrastructure are interested in improving your experience. If you have a PCard Dashboard feature enhancement, please request via IT HelpDesk by submitting a Report Request.

Where does the data come from?
This dashboard is limited to view only data that has been reconciled to fund/organization combinations that you have access to see in Banner. If a transaction has not yet been attached to an ER with FOAPAL

information, it will default to the home organization of the cardholder who made the transaction. If there is an issue with the data being either too expansive or restrictive, please submit a Fund/Org request through Finance Infrastructure or contact your Budget Analyst. Please note that the dashboard will be scheduled to refresh each morning, so each day you will be able to see the data up to the day before.

Who has access to the data?
Anyone who is currently an employee of Liberty can access the dashboard; however, an employee can only see the transactions that reconcile to FOAPALs that they have query access to in Banner. In other words, just because one can access the dashboard, does not mean that any data will be visible.