Transactions by Period

This guide will cover:

- How to navigate to the Transactions by Period report within WyoCloud Reports and Analytics.
- How to run the Transactions by Period report.
- Tips on prompts and reading the Transactions by Period report.

**Step One**
To log into WyoCloud:

- Navigate to the WyoWeb website and select Financial Management from the WyoCloud area.

![WyoWeb Website](image)

**Step Two**
To Navigate to Reports and Navigation in WyoCloud:

- From the WyoCloud Home page, click Navigator (three horizontal lines) in the upper left corner then Reports and Analytics under Tools.
The Reports and Analytics page is displayed.
Step Three

Navigate to the Transactional Reporting Table of Contents, where the Transactions by Period Report is located.

- Select the small **double arrow** above the search.

- From the drop down, select **Shared Folders**.
- All Shared Folders you currently have security access for will display. To locate the Transactional Table of Contents, begin by clicking on the **Custom** folder (you may need to scroll to locate it).

- **Click Dashboards.**
- Click **Table of Contents**.

- To open the **Table of Contents**, click on the **title**.

**Note:** You can set the **Table of Contents** as a favorite for easier navigation in the future. For directions see this [Quick Reference Guide](#).
Step Four
To run Transactions by Period.

- Select **Transactions by Period**. This is located under General Ledger and Budgetary Control.

- Click **Continue** on the pop up notification displayed above the prompts.
Various prompts are available to refine your report. **Accounting Year, Accounting Period(s) and Organization(s)** are required.

- If you would like to filter to just actuals, set the **Encumbrance Type to Expenditures**.

Select **Apply**.

The report is displayed.
The following are a few notes to assist you as you review the report.

- **Under Encumbrance Type:**
  - **Expenditures** are actuals which have been posted to the general ledger.
  - **Commitments** are requisitions.
  - **Obligations** are purchase orders.

- Review the **Journal Description** column for details of the transaction on expenditures.
- The **Journal Category Name** column contains expense types.

This report shows transactional detail relating to requisitions and invoices. It does not contain other types of transactions such as journal entries (such as Interdepartmental Transfers (IDTs)) and transactions integrated into WyoCloud from other systems. Integrated transactions include items such as payroll, Banner, telecom fees, and postal charges.

This report can be exported to Excel by scrolling to the bottom and selecting **export**.

You have now completed the steps to **Transactions by Period Report**.