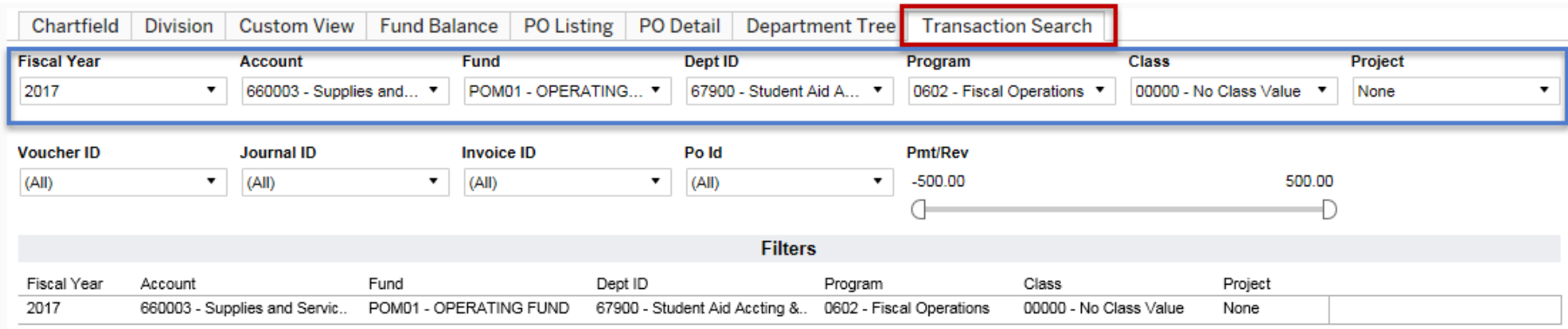


From the **Transaction Search** Tab, perform the following steps:

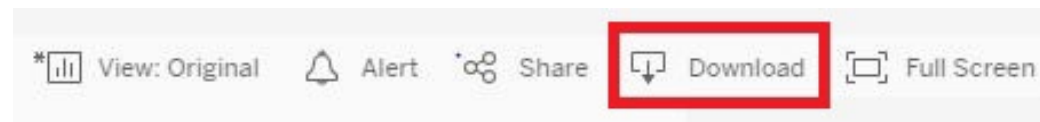
1. In the search criteria at the top of the screen, enter your CFS (Account-Fund-Dept-Program-Class-Project) (Project may not be applicable to everyone). ****The entire CFS must be displayed for your JE Request to be processed.****



The screenshot shows the 'Transaction Search' tab selected in the top navigation bar. Below the navigation bar, there are several dropdown menus for search criteria: Fiscal Year (2017), Account (660003 - Supplies and...), Fund (POM01 - OPERATING...), Dept ID (67900 - Student Aid A...), Program (0602 - Fiscal Operations), Class (00000 - No Class Value), and Project (None). Below these, there are dropdowns for Voucher ID, Journal ID, Invoice ID, and Po Id, all set to '(All)'. A 'Pmt/Rev' section shows a range from -500.00 to 500.00. A 'Filters' section at the bottom displays the selected criteria in a table format.

Fiscal Year	Account	Fund	Dept ID	Program	Class	Project
2017	660003 - Supplies and Serv...	POM01 - OPERATING FUND	67900 - Student Aid Accting &..	0602 - Fiscal Operations	00000 - No Class Value	None

2. In the upper right corner, select **Download**:



3. From the Download pop up box, select **PDF**:

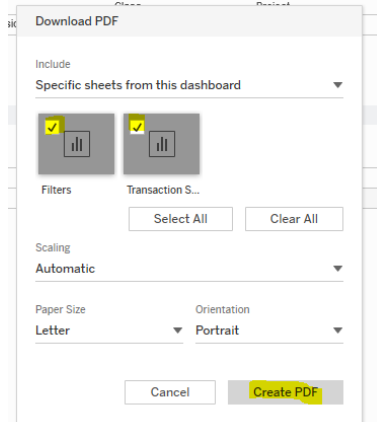
The screenshot shows the Tableau interface with the 'Transaction Search' view. The 'Download' dialog box is open, and the 'PDF' option is selected. The background view shows filters for Fiscal Year, Account, Fund, Dept ID, Program, Class, and Project. Below the filters is a table with columns: Account, Accounting Date, Voucher ID, Journal ID, Invoice ID, Po Id, Description, Venc, and Pmt/Rev. The table contains one row of data and a 'Grand Total' row.

Account	Accounting Date	Voucher ID	Journal ID	Invoice ID	Po Id	Description	Venc	Pmt/Rev
660003 - Supplies and Serv...	8/14/2018	0001301269				CB	CR C	64.49
Grand Total								64.49

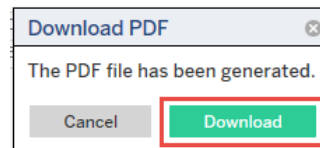
4. In the download PDF box, Select the drop down arrow under **This View** and click **Specific Sheets from this Dashboard:**

The screenshot shows the 'Download PDF' dialog box. The 'Include' dropdown is open, and the 'Specific sheets from this dashboard' option is selected. The dialog also includes options for Paper Size (Letter) and Orientation (Portrait), and buttons for 'Cancel' and 'Create PDF'.

5. Click the box for **Filters** and **Transaction Search**, then click **Create PDF**:



6. Once the Download button is selected, Tableau will process the request. Once done, a message box will appear stating the PDF file was generated. Select the **Download** button again.



7. Your file will be generated, and a second message box will appear asking whether you would like to open or save the file.



8. Save a copy of the file and attach it to your JE Request email as supporting documentation for your request. The Vendor Category field should still be used to populate your Line Description in your JE Request.

EXAMPLE TABLEAU JE REQUEST SUPPORT

Filters

Fiscal Year	Account	Fund	Dept ID	Program	Class	Project	
2016	660003 - Supplies and Servic..	POM01 - OPERATING FUND	67900 - Student Aid Accting &..	0602 - Fiscal Operations	00000 - No Class Value	None	

Payment/Revenue

Account	Accounting Date	Voucher ID	Journal ID	Invoice ID	Po Id	Description	Vendor Category	Pmt/Rev
660003 - Supplies and Services	7/11/2016	00292254	VCH0913733	53012		2015 OFFSET PROGRAM	STATE CONTROLLERS OFF..	930.34
	7/13/2016	0000915098				CB	PRINT JUNE 30	102.74
	7/20/2016	00293015	VCH0918326	240440980	0000061104	MAINTENANCE AGREEMEN..	KONICA MINOLTA BUSINES..	51.22
		00293017	VCH0918326	240441422	0000061103	MAINTENANCE AGREEMEN..	KONICA MINOLTA BUSINES..	19.98
	8/30/2016	00295099	VCH0937547	0000002380	0000061001	DATA REQUEST CHARGES ..	STATE CONTROLLERS OFF..	486.00
	9/7/2016	00295426	VCH0941493	240898760	0000061104	MAINTENANCE AGREEMEN..	KONICA MINOLTA BUSINES..	62.44
	9/13/2016	00295659	VCH0944478	241340135	0000061104	MAINTENANCE AGREEMEN..	KONICA MINOLTA BUSINES..	71.82
	9/16/2016	00295935	VCH0946590	16090257	0000061505	ANNUAL COURIER SERVIC..	SECTRAN SECURITY INC	417.00
						FUEL SURCHARGES OF 6%	SECTRAN SECURITY INC	25.02
	10/4/2016	00296805	VCH0954602	16080254	0000061505	ANNUAL COURIER SERVIC..	SECTRAN SECURITY INC	417.00
						FUEL SURCHARGES OF 6%	SECTRAN SECURITY INC	25.02
	10/7/2016	00297013	VCH0956993	16070250	0000061505	ANNUAL COURIER SERVIC..	SECTRAN SECURITY INC	417.00
						FUEL SURCHARGES OF 6%	SECTRAN SECURITY INC	25.02
	10/17/2016	00297448	VCH0961294	241842629	0000061104	MAINTENANCE AGREEMEN..	KONICA MINOLTA BUSINES..	59.05
	10/20/2016	00298086	VCH0963223	241842282	0000061103	MAINTENANCE AGREEMEN..	KONICA MINOLTA BUSINES..	112.58
		00298087	VCH0963223	16100258	0000061505	ANNUAL COURIER SERVIC..	SECTRAN SECURITY INC	417.00
						FUEL SURCHARGES OF 6%	SECTRAN SECURITY INC	25.02
	11/8/2016	00299038	VCH0973068	0000003045	0000061001	DATA REQUEST CHARGES ..	STATE CONTROLLERS OFF..	486.00
	11/16/2016	00299382	VCH0976635	242317274	0000061104	MAINTENANCE AGREEMEN..	KONICA MINOLTA BUSINES..	57.15
	11/17/2016	00299501	VCH0977218	16110262	0000061505	ANNUAL COURIER SERVIC..	SECTRAN SECURITY INC	417.00
						FUEL SURCHARGES OF 6%	SECTRAN SECURITY INC	25.02
	12/8/2016	00300438	VCH0987217	242846954	0000061104	MAINTENANCE AGREEMEN..	KONICA MINOLTA BUSINES..	93.96
	12/14/2016	00300783	VCH0989806	16120265	0000061505	ANNUAL COURIER SERVIC..	SECTRAN SECURITY INC	417.00
						FUEL SURCHARGES OF 6%	SECTRAN SECURITY INC	25.02
	1/12/2017	00301661	VCH1000669	243377357	0000061103	MAINTENANCE AGREEMEN..	KONICA MINOLTA BUSINES..	54.95
		00301662	VCH1000669	243377173	0000061104	MAINTENANCE AGREEMEN..	KONICA MINOLTA BUSINES..	59.47
	1/20/2017	00302239	VCH1003772	17010265	0000061505	ANNUAL COURIER SERVIC..	SECTRAN SECURITY INC	417.00
						FUEL SURCHARGES OF 6%	SECTRAN SECURITY INC	25.02
	2/1/2017	00303062	VCH1009154	DTRQ-00000077	0000061001	DATA REQUEST CHARGES ..	STATE CONTROLLERS OFF..	486.00
	2/8/2017	0001018243				CB	PRINT JAN 31	330.01
	2/10/2017	00303461	VCH1016664	243857673	0000061104	MAINTENANCE AGREEMEN..	KONICA MINOLTA BUSINES..	59.49
	2/15/2017	00303804	VCH1018583	17020265	0000061505	ANNUAL COURIER SERVIC..	SECTRAN SECURITY INC	417.00
						FUEL SURCHARGES OF 6%	SECTRAN SECURITY INC	25.02
	3/10/2017	00305242	VCH1031149	244295005	0000061104	MAINTENANCE AGREEMEN..	KONICA MINOLTA BUSINES..	31.11
	3/14/2017	00305418	VCH1032517	17030264	0000061505	ANNUAL COURIER SERVIC..	SECTRAN SECURITY INC	417.00
						FUEL SURCHARGES OF 6%	SECTRAN SECURITY INC	25.02
	3/27/2017	00306134	VCH1038275	WDP-00000013	0000061001	DATA REQUEST CHARGES ..	STATE CONTROLLERS OFF..	8.50
	4/26/2017	00308200	VCH1053103	244823475	0000061104	MAINTENANCE AGREEMEN..	KONICA MINOLTA BUSINES..	63.29
		00308201	VCH1053103	244823476	0000061103	MAINTENANCE AGREEMEN..	KONICA MINOLTA BUSINES..	-22.18
		00308244	VCH1053103	17040273	0000061505	ANNUAL COURIER SERVIC..	SECTRAN SECURITY INC	417.00
						FUEL SURCHARGES OF 6%	SECTRAN SECURITY INC	25.02
		00308245	VCH1053103	DTRQ-00000243	0000061001	DATA REQUEST CHARGES ..	STATE CONTROLLERS OFF..	486.00
	5/16/2017	00309386	VCH1064431	245297737	0000061104	MAINTENANCE AGREEMEN..	KONICA MINOLTA BUSINES..	194.81
		00309406	VCH1064431	17050275	0000061505	ANNUAL COURIER SERVIC..	SECTRAN SECURITY INC	417.00
						FUEL SURCHARGES OF 6%	SECTRAN SECURITY INC	25.02
	5/30/2017	00310085	VCH1070730	WCR-00000023	0000061001	DATA REQUEST CHARGES ..	STATE CONTROLLERS OFF..	500.00
	6/14/2017	00311397	VCH1080461	FTB-00000051		2016 OFFSET PROGRAM	STATE CONTROLLERS OFF..	982.80
		00311416	VCH1080461	245754198	0000061104	MAINTENANCE AGREEMEN..	KONICA MINOLTA BUSINES..	73.92
	6/30/2017	0001093259				ACCRUAL20	PO 61505 INV # 17060281	442.02
		0001095708				ACCRUAL33	ACCRUE SCO INV 430 DUE ..	500.00
Grand Total								11,645.69