# Submitting Self-reporting Transactions

*(Only Agency Owners and Data Managers for self-reporting agencies have this capability):*
*If an Agency is not self-reporting, they will need to contact DSBSD to have us upload the transactions.*
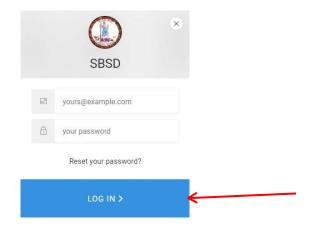
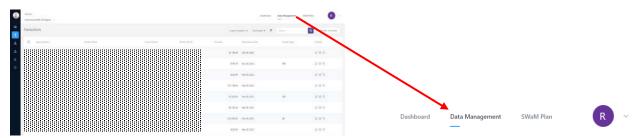## Contents

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## Navigating to the Self-reporting Screen:

1. Log into Dashboard using state e-mail address and password. Click Login.
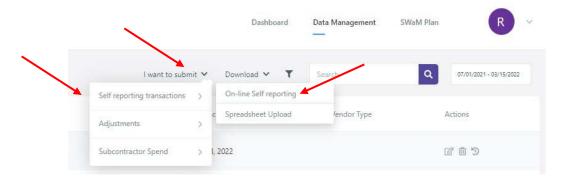


2. Click Data Management tab at top of screen.



3. Self-reporting transactions can be entered manually in the system or through a spreadsheet upload.
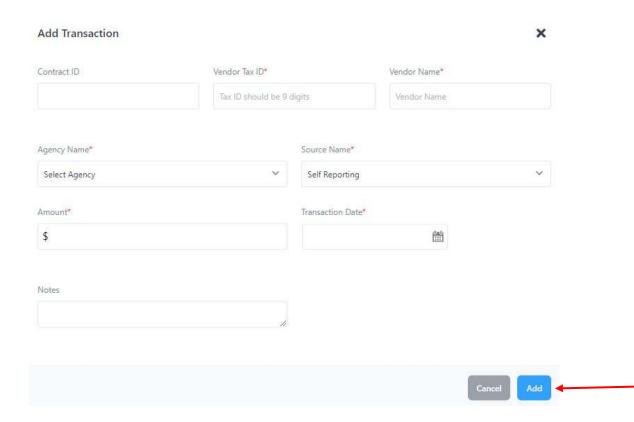
# Manual Self-reporting Transactions (On-line)

1. Manual self-reporting is best when you only have a few self-reporting transactions. To enter manual self-reporting transactions, click:

**I want to Submit > Self-reporting Transactions > On-line Self Reporting**



2. You will then see a box that says add transaction. Enter Contract ID (if known, if unknown, leave blank), Enter tax ID number. Select Vendor Name from dropdown Vendor name box. Agency Name should default to User's Agency. If not, change it to the correct agency. Enter amount of transaction. Transaction date should default to current date. Enter something in notes to explain why transaction is being entered into dashboard. Click the Add button.
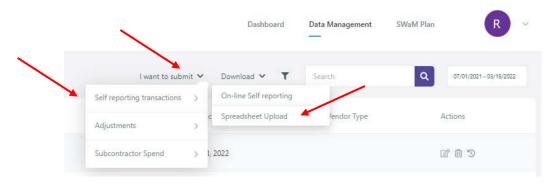
3. Self-reporting transactions will show in the system when they have posted.

4. Repeat steps 4-6 for additional self-reporting transactions.
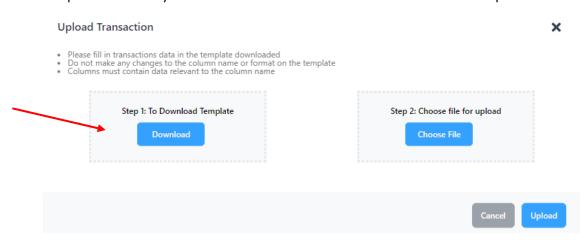
## Spreadsheet Upload

1. Spreadsheet Upload  self-reporting is best when you have a large number of self-reporting transactions. To enter self-reporting transactions via a spreadsheet upload, click:

**I want to Submit > Self-reporting Transactions > Spreadsheet Upload**



2. You will see a Upload Transaction Box.  You will first need to download the self-reporting template from the system.  Click the download button to download the template.
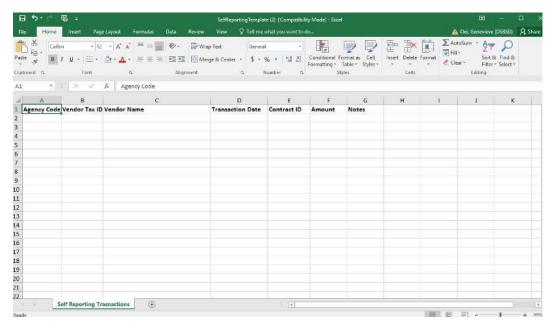


3. The Excel File should show at the bottom of your screen.  Click on the file to open it.
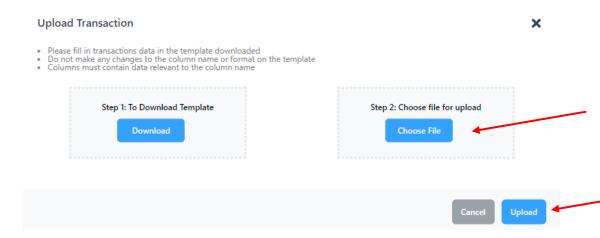
4. The Excel file will look like the file below. Fill out the spreadsheet with the required information. Tax ID should be 9 digits, if less than 9 digits, leading zero's need to be added. Transaction date needs to be in mm/dd/yyyy format. Contract IDcan be entered if known, but if unknown, it should be left blank. Amount should be entered with two digits places after the decimal point. Do not make any changes to the column name or format of the spreadsheet.



5. Save file on Computer and upload to the dashboard by clicking on the choose file button under step 2.

6. Browse to file on Computer. Click on File. Click on Open Button.
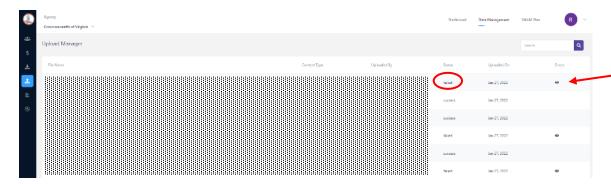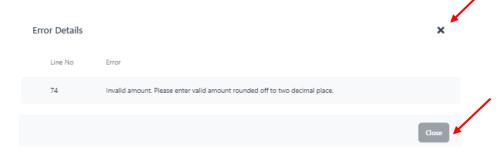
7. Click the Upload Button.

8. You should see either a green success message or red failure message towards the upper-right corner of the screen. If the upload was successful, you will see the self-reporting transactions on the screen.

9. You can also check the upload manager to see if the upload was successful. The upload manager is the up arrow icon on the left-hand side of the screen. Click on the upload manger manager icon.



10. If the Upload was successful, the status will say success. If the upload was not successful, the status will say failed. If the status says failed, you can click on the eyeball icon to see why the upload failed.



11. You will see an error report explaining why the file did not upload. After looking at the report, click the close button or x in the upper right-hand corner to close the error report.



12. Re-open Excel Spreadsheet. Fix errors and re-upload the file.

13. Check to see if upload was successful.