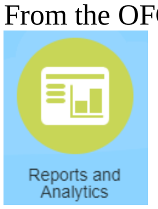
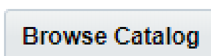
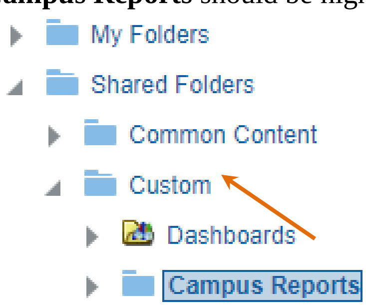
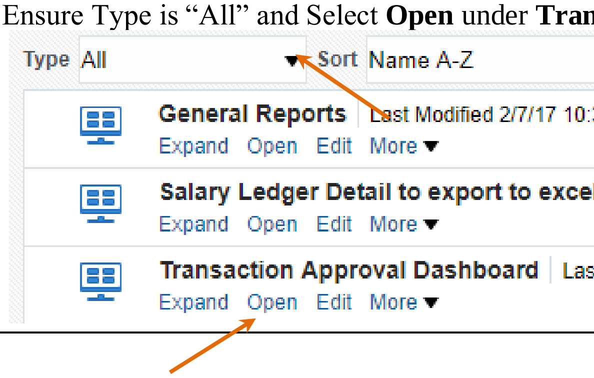
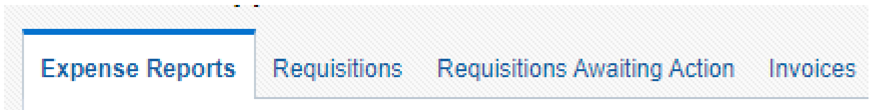
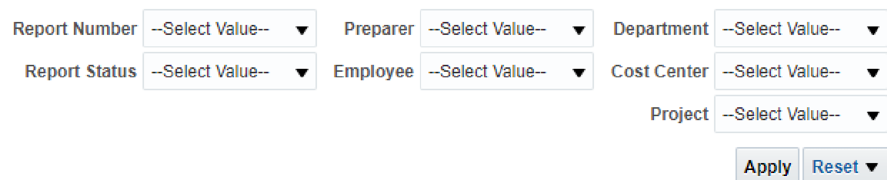
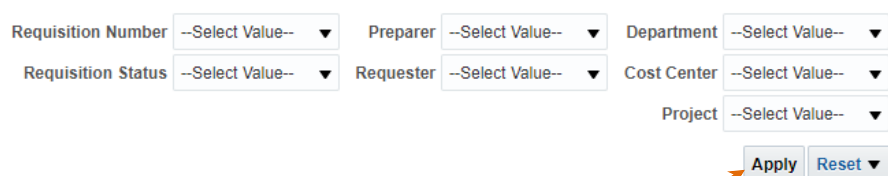
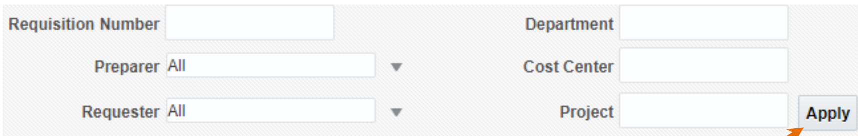
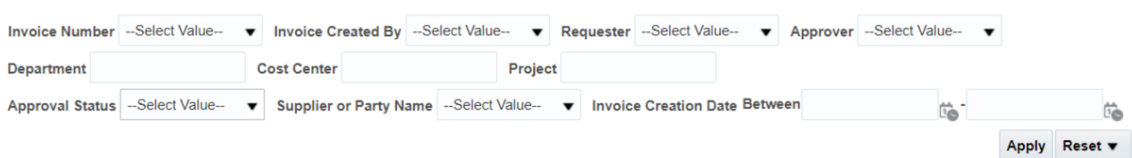
Running a Transaction Approval Dashboard Report

Purpose: Dashboard reports allow users to quickly search for the approval records for Expense Reports and Requisitions.

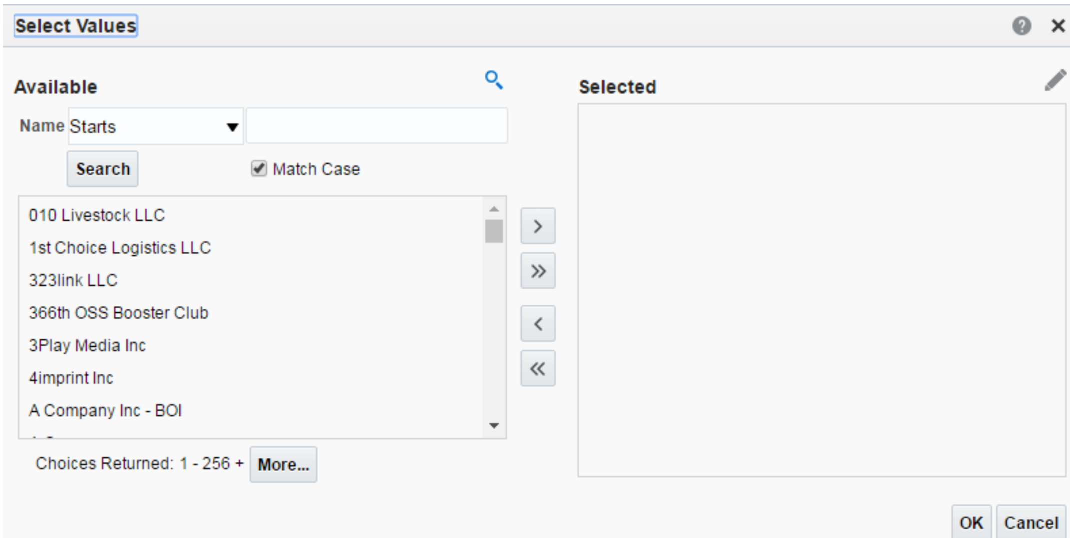
Step	Action
1.	Access the **Transaction Approval Dashboard** by clicking the icon on the Home Page or via the Navigator menu. To access the **Home Page** in OFC, click the house icon at the top of the screen. 
2.	From the OFC **Home Page**, click the **Reports and Analytics** icon. 
3.	Click  in the upper right hand corner to open reporting. ***Note***: A new window will open.
4.	Navigate to Shared Folders / Custom / Dashboards by using the chevrons to open each folder. **Campus Reports** should be highlighted as pictured below. 
5.	Ensure Type is "All" and Select **Open** under **Transaction Approval Dashboard**. 

Step	Action
6.	Select appropriate tab. 
7.	**Expense Report Approvals:** Search and view the approval history for all submitted Expense Reports. *Report Number*: Leave blank, enter, or search for specific Expense Report Number. *Preparer*: Leave blank or search for specific Employee Name(s). *Report Status:* Leave blank or search for Expense Reports in a specific status. *Employee*: Leave blank or search for specific Employee Name(s). *Funding Source Segment Values*: Leave blank, enter, or search for specific values.  Click **Apply** for results
8.	**Requisitions Approvals**: Search and view approval history for all submitted Requisitions. *Requisition Number*: Leave blank, enter, or search for specific Requisition Number *Preparer*: Leave blank or search for specific Employee Name(s). *Requisition Status:* Leave blank or search for Requisitions in a specific status. *Requester*: Leave blank or search for specific Employee Name(s). *Funding Source Segment Values*: Leave blank, enter, or search for specific values.  Click **Apply** for results

Step	Action
9.	**Requisition Awaiting Action**: Search and view the next approver for **Pending** Requisitions. *Requisition Number*: Leave blank, enter, or search for specific Requisition Number *Preparer*: Leave blank or search for specific Employee Name(s). *Requester*: Leave blank or search for specific Employee Name(s). *Funding Source Segment Values*: Leave blank, enter, or search for specific values.  Click **Apply** for results
10.	**Invoice Payment Approvals:** Search and view the approval history for all submitted Invoice Payments. *Invoice Number*: Leave blank or search for specific Invoice Number *Invoice Created By:* Leave blank or search by the name of the Invoice Payment creator. *Requester*: Leave blank or search for the name of the Invoice Payment requester *Approver:* Leave blank or search for Approvers included in the Approval Workflow. *Department*: Leave blank or search for specific Department associated with Invoice Payment. *Cost Center:* Leave blank or search by Cost Center used to pay for the invoice. *Project:* Leave blank or search by Project used to pay for the invoice. *Approval Status:* Leave blank or select the Invoice Payment status you're searching for. *Supplier or Party Name*: Leave blank or search for specific Supplier/Vendor. *Invoice Creation Date:* Leave blank or include date range of Invoice Payment creation.  Click **Apply** for results

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>11.</td><td>

Search Tips: Select the operator Starts, Contains, Ends, or is Like. Uncheck Match Case Highlight value(s) and add and remove values using the > and <.



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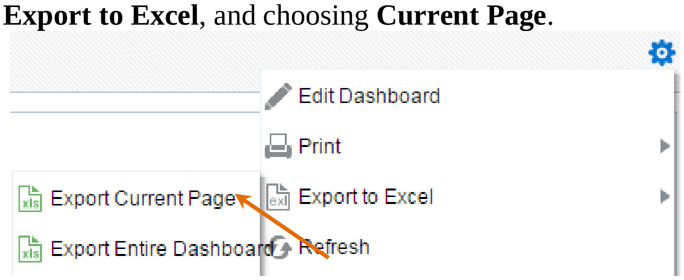
<tr><td>12.</td><td>

Dashboard Reports may be exported to Excel by selecting in the upper right hand corner, **Export to Excel**, and choosing **Current Page**.



Note: Requisition Lifecycle may be exported using the same icon just above the results and under the **Apply** button.

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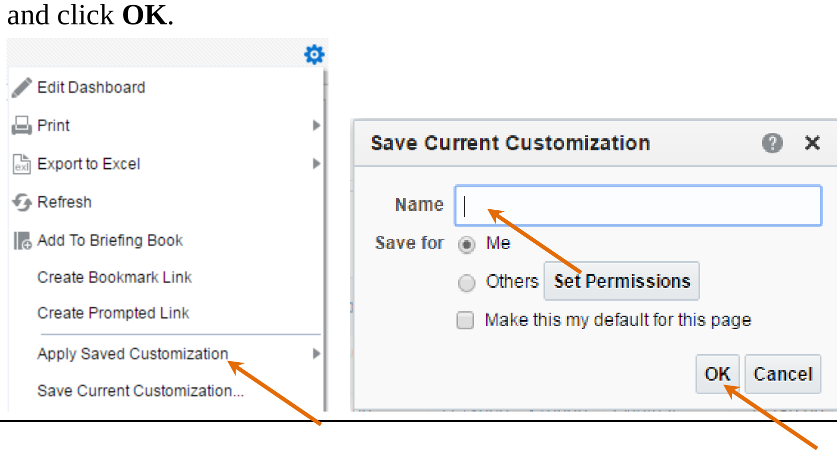
Search Parameters may be saved for Dashboard Reports by entering search values, selecting in the upper right hand corner, select **Save Current Customization**, enter a **Name** for the search, and click **OK**.



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Step	Action
14.	**End of Procedure**