

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 Browse Catalog 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.
	Shared Folders
	Common Content
	🖌 🚞 Custom 📉
	Dashboards
	Campus Reports
5.	Ensure Type is "All" and Select Open under Transaction Approval Dashboard .
	Type All Sort Name A-Z
	General Reports Last Modified 2/7/17 10:: Expand Open Edit More ▼
	Salary Ledger Detail to export to excel ► Expand Open Edit More ▼
	Transaction Approval Dashboard Las Expand Open Edit More ▼



Step	Action
6.	Select appropriate tab.
	Expense Reports Requisitions Requisitions Awaiting Action Invoices
7.	Expense Report Approvals: Search and view the approval history for all submitted Expense Reports.
	<i>Report Number</i> : Leave blank, enter, or search for specific Expense Report Number. <i>Preparer</i> : 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.
	Report NumberSelect Value V PreparerSelect Value V DepartmentSelect Value V
	Report StatusSelect Value V EmployeeSelect Value V Cost CenterSelect Value V
	ProjectSelect Value
	Apply Reset -
	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.
	Requisition NumberSelect Value V PreparerSelect Value V DepartmentSelect Value V
	Requisition StatusSelect Value 🔻 RequesterSelect Value 🔻 Cost CenterSelect Value 🔻
	ProjectSelect Value
	Apply Reset
	Click Apply for results



9.	Requisition Awaiting Action: Search and view the next approver for Pending Requisitions.Requisition Number: Leave blank, enter, or search for specific Requisition NumberPreparer: Leave blank or search for specific Employee Name(s).
	<i>Requester</i> : Leave blank or search for specific Employee Name(s).
	Funding Source Segment Values: Leave blank, enter, or search for specific values.
	Requisition Number Department
	Preparer All Cost Center
	Requester All Project Apply
	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.
	<i>Requester</i> : Leave blank or search for the name of the Invoice Payment requester <i>Approver</i> : Leave blank or search for Approvers included in the Approval Workflow.
	<i>Department</i> : 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.
	Invoice NumberSelect Value
	Department Cost Center Project
	Approval StatusSelect Value Supplier or Party NameSelect Value Invoice Creation Date Between
	Click Apply for results



Step	Action
11.	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 <.
	Select Values @ ×
	Available Selected
	Name Starts Image: Constraint of the start of the sta
	010 Livestock LLC 1st Choice Logistics LLC 323link LLC 366th OSS Booster Club 3Play Media Inc 4imprint Inc A Company Inc - BOI Choices Returned: 1 - 256 + More
	OK Cancel
12.	Dashboard Reports may be exported to Excel by selecting in the upper right hand corner, Export to Excel, and choosing Current Page.
13.	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 .
	Edit Dashboard Print Export to Excel Refresh Refresh Red To Briefing Book Create Bookmark Link Create Prompted Link Apply Saved Customization Save Current Customization OK Cancel



Step	Action
14.	End of Procedure