# Historical eRequest Reports in Tableau

All eRequest data has been transferred to the Tableau Server. Follow instructions below to run historical eRequest Reports.

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## STEP 1:
## Request access to Tableau Server and associated reporting tools.

- Refer to Job Aid – **Requesting Access to Enterprise Data for Analytics** to request access (https://admin.resources.osu.edu/reporting-and-data-tools/reporting-and-analytics-environment-rae/requesting-access-to-enterprise)
    - Select the **Finance and Supply Chain – Spend: Reporting** domain.
    - Select **OASIS attachment access** for use with other historical data (e.g., receipts with eRequest).
- Allow up to **1 week** for access approval.

## STEP 2:
## Login to Tableau Server (https://tableau.osu.edu)

- Click **Secure Data** button.
- Review the terms of Service.
- Click **Proceed to Reports** button.
- Login using BuckeyePass.
- Once at the Tableau homepage, click **Explore** in the navigation menu on the left to pull accessible folders.

Continue with steps associated with applicable report (Step 4).

## STEP 3:
## Select Applicable Report

**Historical eRequest – Bulk Download** (Go to eRequest Bulk Download Instructions)
Search by filters to download bulk (e.g., full fiscal year) eRequest data to Excel for additional sorting and review. When necessary, go to **OASIS** (https://oasisattachments.containers.it.osu.edu) to view attachments.

**Historical eRequest – Dashboard** (Go to eRequest Dashboard Instructions)
Search by filters to populate panel with eRequest results to view only. Click on Request # to view specific content, comments, or attachments at **OASIS** (https://oasisattachments.containers.it.osu.edu).

## eRequest Bulk Download Instructions

- Click on the **Enterprise** folder → **Finance and Supply Chain** folder → **Spend** folder → **Historical** folder → **Historical eRequest - Bulk Download** → **Historical eRequest - Bulk Download**

### Set-up Report Filters

- Select the search filters you need to narrow your results. You MUST click the **Apply** button with each filter to confirm your selection.
    - The Submitted Date Start and Submitted Date End filter is based on the date of submission for the eRequest and should be adjusted to the timeframe that meets your needs.
    - VP College selection must be applied to trigger other filters. Only one (1) VP College area can be selected at a time to avoid system time-out.
    - Bulk data includes all statuses (including those that are NEW or DENIED) and may not have an org established with the Request #. Requests with "null" content may populate in the output.
- Click **Go to Report**

**Note:** To reset (clear filter entry), click **Revert** (in upper left corner). When making changes and adjustments to the filters or start/end date, allow a few minutes for the results to refresh.

### Export Bulk Download Results

- Upon output display, click the **Excel** icon
- Select **Excel** radio button as the format and click **Download**
- Results will appear onscreen and in your **Downloads** folder

**Note:** When a request contains a split chartfield, extra rows will populate to document each unique chartfield row and may impact spend or request volume totals. Apply Excel features (e.g., remove duplicates) as needed.

### View Comments or Attachments

- To view any **comments** associated with a specific Request # identified in the bulk download, go to: **Historical eRequest – Dashboard** in Tableau Server.
- To view any **attachments** associated with a specific Request #, go to: **Historical eRequest – Dashboard** in Tableau Server and click attachment tab to link out of Tableau Server to **OASIS** (https://oasisattachments.containers.it.osu.edu).
    - At OASIS dashboard, select application type (e.g., eRequest) and enter the Request #.
    - Click the **Submit** button.
    - The File Name and the File Description of all attachments related to the request number that you entered will appear in the table. You can select the **Download All** button or choose to Download each file individually in the File Action section.

## eRequest Dashboard Instructions

- Click on the **Enterprise** folder → Finance **and Supply Chain** folder → **Spend** folder → **Historical** folder → **Historical eRequest - Bulk Download** → **Historical eRequest - Dashboard**

### Set-up Report Filters

- Click on the **Search Parameters** icon in the upper right corner of the report dashboard to display filter options.
- Select the search parameters you need to narrow your results. You MUST click the **Apply** button with each filter to confirm your selection.
  - The Submitted Date Start and Submitted Date End filter is based on the date of submission for the eRequest and should be adjusted to the timeframe that meets your needs.
  - VP College selection must be applied to trigger other filters. Only one (1) VP College area can be selected at a time to avoid system time-out.
  - Output includes all statuses (e.g., NEW or DENIED) and may not have an org established with the Request #. Requests with "null" content may populate in the output.
- When you are done entering the search filters, select the **"X"** button to close the pane.
- Results will populate in the center of the eRequest-Dashboard Report.

**Note:** To reset (clear filter entry), click **Revert** (in upper left corner). When making changes and adjustments to the filters or start/end date, allow a few minutes for the results to refresh.

### Navigating Dashboard Report Results

- On the Historical eRequest-Dashboard tab, hover over column headings for additional sort options.
- After locating the Request # that you wish to review, click on that row to narrow tab view results.
  - **IMPORTANT!** If you do not select a single Request # before clicking through the additional tabs, there may be delays as the data loads and refreshes.
- After selecting a single Request # row, click through the tabs running along the top of the report to view additional information for the Request #, including comments and attachments.
- To view or download any attachments associated with a specific Request #, click attachment tab to link out of Tableau Server to **OASIS** (https://oasisattachments.containers.it.osu.edu).
  - At OASIS dashboard, select application type (e.g., eRequest) and enter the Request #.
  - Click the **Submit** button and download option to view.

### Export Report Results

Exporting large data ranges is not recommended with the eRequest Dashboard. Go to **eRequest Bulk Download** for best results with large data ranges.

- For single Request # tab content, click the **Download** link in the report header (upper/right side)
- Click **Crosstab** file format
- Select **Excel** radio button
- Click **Download** button
- Results from the selected Request # and tab will appear in your **Downloads** folder