

Historical eRequest Reports in Tableau

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

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