Historical eTravel Reports in Tableau

All eTravel data has been transferred to the Tableau Server. Follow instructions below to run historical eTravel 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)

  o Select the **Finance and Supply Chain – Spend: Reporting** domain.

  o 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.

STEP 3:

Select Applicable Report

Historical eTravel – Travel Request
Search by filters to view and/or download travel request data to Excel for additional sorting and review.   Click on a Request # to populate tab content for comments and attachments. Attachment tab will link out of Tableau Server to **OASIS** (https://oasisattachments.containers.it.osu.edu).

Historical eTravel – Payment Request
Search by filters to view and/or download payment request data to Excel for additional sorting and review.   Click on a Request # to populate content for comments and attachments. Attachment tab will link out of Tableau Server to **OASIS** (https://oasisattachments.containers.it.osu.edu).

Historical eTravel – Travel Exception
Search by filters to view and/or download travel exception data to Excel for additional sorting and review.

STEP 4:

Run eTravel Report – follow path below to navigate to the applicable eTravel report

- Click on the **Enterprise** folder ➜ **Finance and Supply Chain** folder ➜ **Spend** folder ➜ **Historical** folder
- Select applicable Historical eTravel Report: **Travel Request <u>or</u> Payment Request <u>or</u> Travel Exception**

Set-up Report Filters

- Click on the selected report to display the dashboard.
- Click on the **Search Parameters** icon in the upper right corner of the report dashboard to display filter options.
- Select the search filters you need to narrow your results. You <u>MUST</u> click the **Apply** button with each filter to confirm your selection.
    - Business Unit and 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.
    - 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.
- When you are done entering the search filters, select the **"X"** button to close the pane.
- The Departure Date and Return Date filter should be adjusted to the applicable timeframe at the top of the page
- Results will populate in the center of the Travel 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 Report Results

- In the report output display, 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 (**not applicable to the Travel Exception Report**).

- 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., eTravel) and enter the Request # (**not T#**).
    - Click the **Submit** button and download option to view.

Export Report Results

- Click the **Download** link in the report header (upper/right side)
- Click **Crosstab** file format
- Select **Excel** radio button
- Click **Download** button
- Results will appear in your **Downloads** folder