Historical PCard Reports in Tableau

All PCard transaction data compiled in eReports (prior to transition to Workday) has been transferred to the Tableau Server. Follow instructions to run historical PCard 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 PCard Compliance Report
PCard Compliance Report provides approval detail associated with PCard transactions. This report can be used to confirm approval status in accordance with policy requirements.

Historical PCard Reconciliation Report
PCard Reconciliation Report provides transaction detail for the summarized entries posted to the General Ledger in Peoplesoft.

Historical PCard Transaction Report
PCard Transaction Report provides transaction detail for a specified period (prior to Workday). This report can be used to verify transaction details (e.g., amount, MCC, dates) and analyze trends (e.g., frequency of vendor usage and spend volumes).

STEP 4:

Run PCard Report – follow path below to navigate to the applicable folder to run Travel reports

- Click on the **Enterprise** folder → **Finance and Supply Chain** folder → **Spend** folder → **Historical** folder
- Select applicable Historical eTravel Report: **Historical PCard Compliance** or **Reconciliation** or **Transaction Report**

Set-up Report Filters

- Click on the selected report to display the dashboard.
- Click on the **Filters and Details pane** 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 MUST click the **Apply** button with each filter to confirm your selection.
- When you are done entering the search filters, select the **"X"** button to close the pane.
- The Start Date and End 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.

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