

Travel Reporting

Use this Quick Start Guide to learn how to log in and use the USF Travel Reports:

- Pending Status Travel Requests:** Provides details on travel requests, recent actions, and send backs.
- Pending Status Expense Report:** Shows logged expense reports for travel, including Holds, Send Backs, and recent activity.
- TRs Approved with No ER:** Displays travel requests that were approved with no expense report.

Important to Know

Security permissions are set to enable sharing of this data to appropriate users, e.g., travel coordinators have access to view travel requests submitted by travelers in their departments.

Data in these reports are not live but are refreshed once daily from Archivum. View the date on the bottom right of each report to confirm the refresh date.

Log In to Power BI:

- Open <https://app.powerbi.com>
- Click **Sign in**.
- Enter your USF email address and click **Next**.
- Enter your USF password and click **Sign in** (some browsers skip this step) *.
- Select the Apps option in the left panel to access the Travel reports.

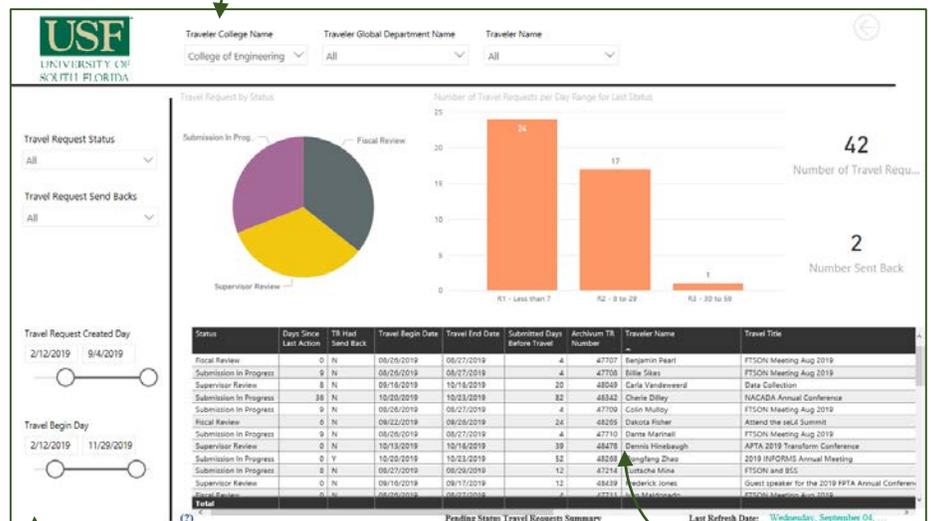


*After your initial login, subsequent logins ask only for your USF email address.

Navigate the Reports:

Top Panel:

Select department, travelers, and codes



Filter Panel:

Select statuses and dates

Data Panel (Workspace):

The displays are interactive; that is, if you select a component in one section, the numbers in the other sections adjust accordingly. To return to the full display, click that segment again.

Hover over the pie chart or bar chart segments to view counts for that selection.

Export to Excel

Each report has one or more tables – you can export the data into Excel

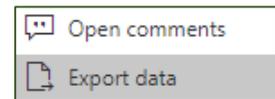
Select one of the detailed reports in table view (e.g., Last Action Details).

1

Hover over the table, then click the ellipses in the top right corner of the table display .

2

Select Export data:

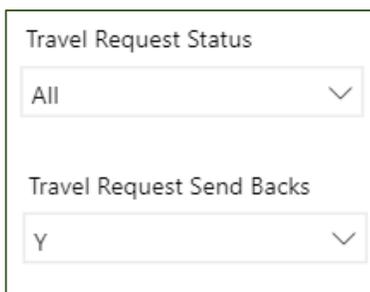


...and work with the data in Excel.

3

View TR Send Backs

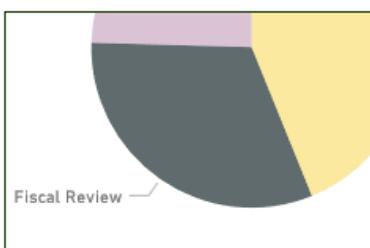
1. In Pending Status Travel Requests, select Y in Travel Request Send Backs.



Travel Request Status
All

Travel Request Send Backs
Y

2. Click on the pie chart for more options, such as send backs that are in Fiscal Review.



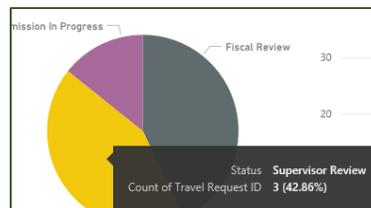
3. View the selections in the Status Table.

1. In Pending Status Travel Requests report, make desired filter selections.

2. In the Workspace, click on the bar chart for R4 – 60 to 89.



3. Hover over the pie slices to view the counts for each status.

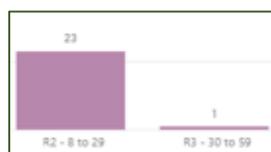


View TRs with No Status Change

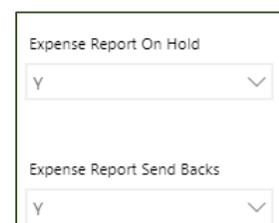
View Expense Report Holds

1. In Pending Status Expense Report, select Y in the Expense Report On Hold filter.

2. Select additional options, such as holds that have not had recent status changes.



3. Optionally filter for Expense Report Send Backs in the Filter Panel.



Expense Report On Hold
Y

Expense Report Send Backs
Y

Detailed instructions on working with Travel reports are located here:

<https://www.usf.edu/business-finance/controller/payment-services/traveltraining.aspx>