Workflow Status Reports

Workflow status reports provide visibility into the status and details of selected transactions in workflow based on cost object or BFR/Organizational Unit (appropriate access required).

Workflow Status & Clean Close

The expectation of clean close is that all allowable expenses are posted to the ledger when closeout documentation is submitted to closeoutdocs@duke.edu. The workflow status reports support clean close, providing users visibility into transactions in workflow that have not yet posted in order to determine appropriate action to facilitate approvals/resolve issues in a timely fashion.

About the Workflow Status Reports

- This guide covers 4 reports: Workflow Status Report, Workflow Status Report by Cost Object, iForms Workflow Status Report, & iForms Workflow Status by Cost Object
- Reports provide important status related information including the transaction type, current person(s) able to approve the transaction, how long it has been in the current workflow step, when it was initially created, and other transaction details.
- Report data is updated every 30 minutes and should not be used to manage deadlines.
- Reports can be filtered to display specific transaction types.
- Reports can be run by multiple cost objects/org. units (appropriate access required).
- Cost Object-based reports include only those transactions which were initiated or have moved in workflow as of 10/14/15. Run the BFR-based reports to view transactions initiated prior to 10/14/15 without workflow activity after 10/13/15.

	Workflow Status Report	Workflow Status Report by Cost Object	iForms Workflow Status Report	iForms Workflow Status by Cost Object
Run by BFR/Org Unit	✖		✖	
Run by Cost Object		✖		✖
Transaction Type & Availability **(Transaction becomes visible on designated report at point indicated below)**				
Accounts Payable Check Requests (APCR)	Submitted	Submitted		
Accounts Receivable (AR)	Completed*	Completed*		
Online Expense Reports (Travel)	Submitted	Submitted		
Electronic Research Administration (ERA)	Saved as Draft/Submitted	Saved as Draft/Submitted		
Journal Entries/Vouchers (JV)	Completed*	Completed*		
Accounts Payable Vendor Invoices (APInv)	Invoice Blocked by AP	Invoice Blocked by AP		
Buy@Duke (B@D)	Saved as Draft/Submitted	Saved as Draft/Submitted		
Security Administration Requests (Security)	Submitted			
Faculty System (dFAC)			Saved as Draft/Submitted	Saved as Draft/Submitted
iForms			Saved as Draft/Submitted	Saved as Draft/Submitted
Report Location **(Access to tabs on Duke@Work is restricted by security role)**				
Duke@ Work - iForms Tab - Reporting			✖	✖
Duke@ Work - Grants Mgmt. Tab – Effort and Payroll Tools & Reports				✖
Duke@ Work - Grants Mgmt. Tab – Sponsored Research Reporting	✖	✖		
Duke@ Work - Finance Tab – Financial Reports	✖	✖		

* 'Completed' does not indicate final approval of the transaction. 'Completed' indicates that the transaction has entered workflow.

Workflow Status Reports

Workflow Status Report

The Workflow Status Report displays transactions currently in workflow based on the BFR/Org Unit of the transaction.

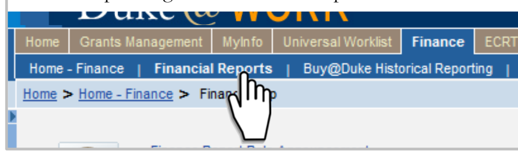
1 Navigate to the Workflow Status Report on Duke@Work via the "Grants Management" tab or the "Finance" tab. *The report may take time to load. Multiple pop-ups may display during loading.*

Via Grants Management Tab

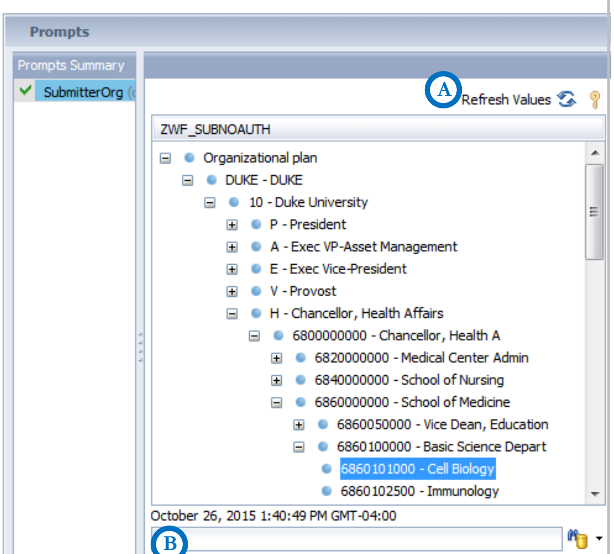
Select the "Grants Management" tab, followed by the "Sponsored Research Reporting" link. On the resulting page, select the "Workflow Status Report" link to launch the report.

Via Finance Tab

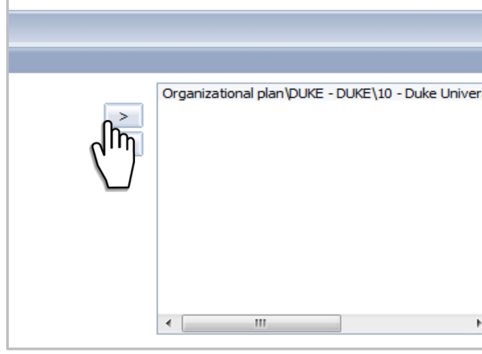
Select the "Finance" tab, followed by the "Financial Reports" link. On the resulting page, select the "Workflow Status Report" link and then "Workflow Status Report" again to launch the report.



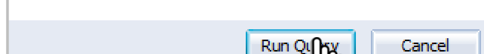
2 When the "Prompts" window displays, (A) select the "Refresh Values" button to display the Organizational Hierarchy or (B) use the search to display a list of matching BFR's.
If using the search, place the wildcard asterisk * at the end of the BFR entered or no results will display (i.e. 6860201*).



3 Select an item from the hierarchy or search results list. Then select the right arrow ">" button to add the BFR to the report. It will display in the right box on the "Prompts" window. Repeat to add any additional BFR.

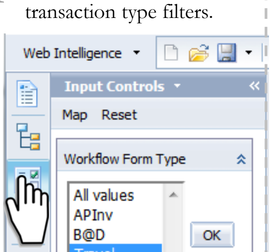


4 Select the "Run Query" button to generate the report.

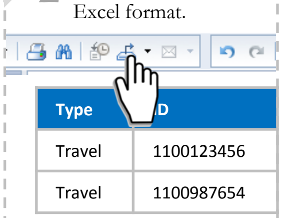


Additional Options

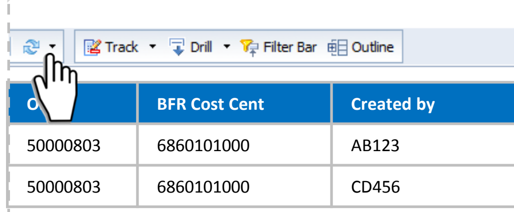
Option 1 Use the Input Controls button to access transaction type filters.



Option 2 Use the Export button to save the report in Excel format.



Option 3 Use the Refresh button to update the results or modify the report selections.



Workflow Status Reports

Workflow Status Report by Cost Object

The Workflow Status Report by Cost Object displays transactions currently in workflow based on the cost object associated with the transaction.

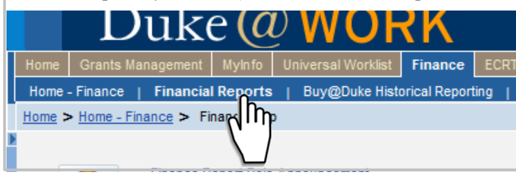
1 Navigate to the Workflow Status Report by Cost Object on Duke@Work via the "Grants Management" tab or the "Finance" tab.

Via Grants Management Tab

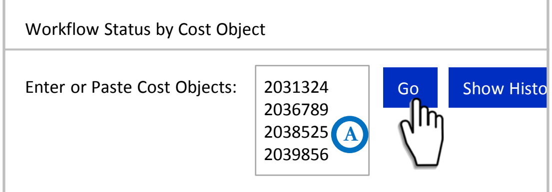
Select the "Grants Management" tab, followed by the "Sponsored Research Reporting" link. On the resulting page, select the "Workflow Status Report by Cost Object" link.

Via Finance Tab

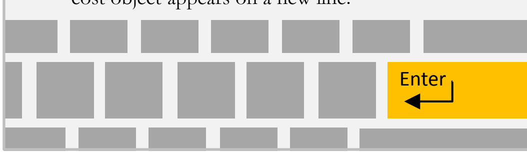
Select the "Finance" tab, followed by the "Financial Reports" link. On the resulting page, select the "Workflow Status Report" link and then "Workflow Status Report by Cost Object" to launch the report.



2 Enter cost object(s) into the text box and select the "Go" button. If entering multiple cost objects (either by typing or pasting), ensure that each cost object appears on a new line in the text box (see "A" below).

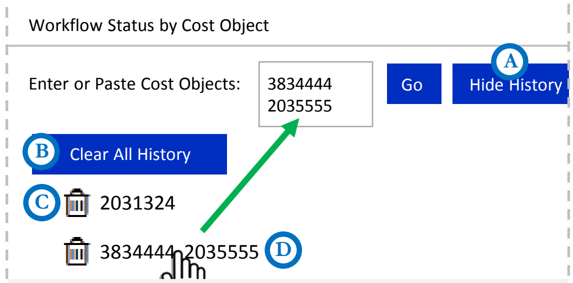


A. Typing multiple entries: Press the "Enter" or "Return" key after typing each cost object so that each cost object appears on a new line.



Additional Options

Option 1 Use the "Show/Hide History" button to view/access cost objects utilized in your previous report runs.



A. Show/Hide History: Displays or hides cost object listing from prior report runs.

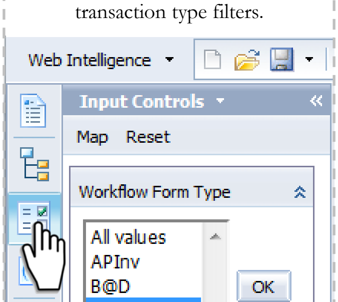
B. Clear All History: Permanently removes history of all prior report runs.

C. Delete Row: Delete corresponding row from history.

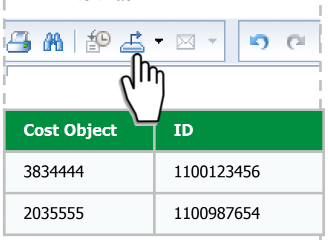
D. Select Row: Populates cost object text box with cost objects listed in selected row.

Additional Options (Continued)

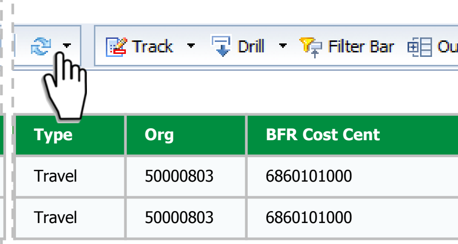
Option 2 Use the Input Controls button to access the transaction type filters.



Option 3 Use the Export button to save the report in Excel format.



Option 4 Use the Refresh button to update the results or modify the report selections.



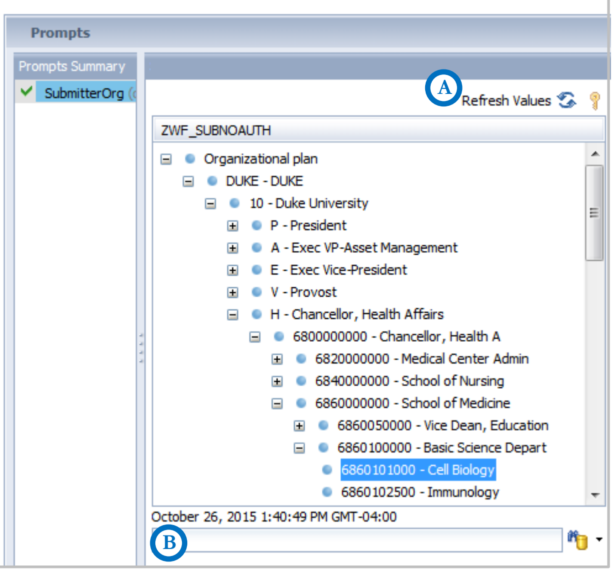
Workflow Status Reports

iForms Workflow Status Report

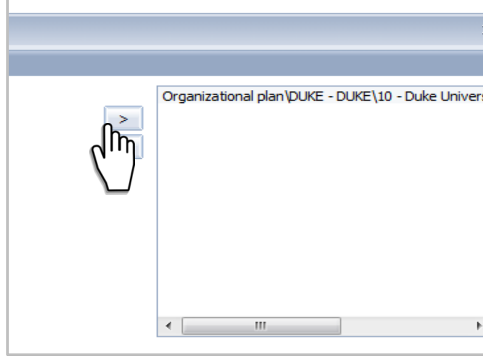
The iForms Workflow Status Report displays payroll related transactions currently in workflow based on the BFR/Org Unit of the transaction.

1 Navigate to the iForms Workflow Status Report on Duke@Work via the "iForms" tab, followed by the "Reporting" link. On the resulting page, select the "iForms Workflow Status Reporting" link and then "iForms Workflow Status by Cost Object." *The report may take time to load. Multiple pop-ups may display during loading.*

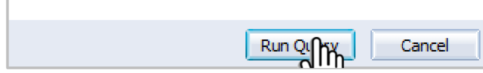
2 When the "Prompts" window displays, (A) select the "Refresh Values" button to display the Organizational Hierarchy or (B) use the search to display a list of matching BFR's. If using the search, place the wildcard asterisk * at the end of the BFR entered or no results will display (i.e. 6860201*).



3 Select an item from the hierarchy or search results list. Then select the right arrow ">" button to add the BFR to the report. It will display in the right box on the "Prompts" window. Repeat to add any additional BFR.

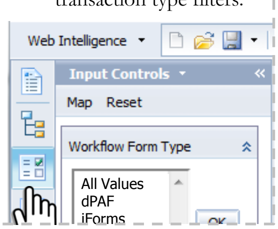


4 Select the "Run Query" button to generate the report.

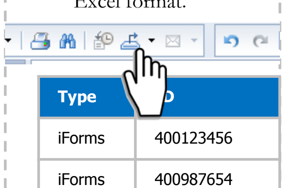


Additional Options

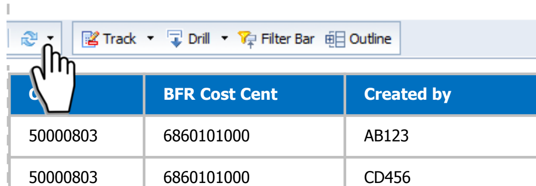
Option 1 Use the Input Controls button to access transaction type filters.



Option 2 Use the Export button to save the report in Excel format.



Option 3 Use the Refresh button to update the results or modify the report selections.



Workflow Status Reports

iForms Workflow Status by Cost Object

The iForms Workflow Status by Cost Object displays payroll related transactions currently in workflow based on the cost object associated with the transaction.

1 Navigate to the iForms Workflow Status by Cost Object Report on Duke@Work via the "Grants Management" tab or the "iForms" tab.

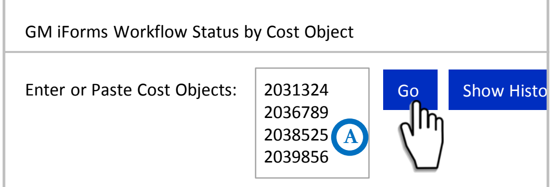
Via Grants Management Tab

Select the "Grants Management" tab, followed by the "Effort and Payroll Tools and Reports" link. On the resulting page, select the "Grants Manager iForms Workflow Status by Cost Object."

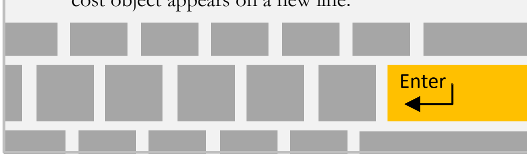
Via iForms Tab

Select the "iForms" tab, followed by the "Reporting" link. On the resulting page, select the "iForms Workflow Status Reporting" link and then "iForms Workflow Status by Cost Object."

2 Enter cost object(s) into the text box and select the "Go" button. If entering multiple cost objects (either by typing or pasting), ensure that each cost object appears on a new line in the text box (see "A" below).

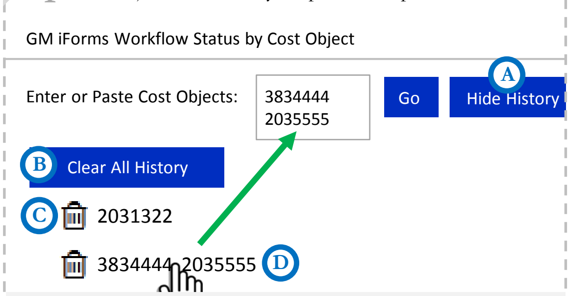


A. Typing multiple entries: Press the "Enter" or "Return" key after typing each cost object so that each cost object appears on a new line.



Additional Options

Option 1 Use the "Show/Hide History" button to view/access cost objects utilized in your previous report runs.



A. Show/Hide History: Displays or hides cost object listing from prior report runs.

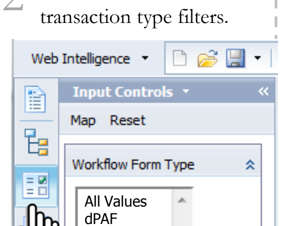
B. Clear All History: Permanently removes history of all prior report runs.

C. Delete Row: Delete corresponding row from history.

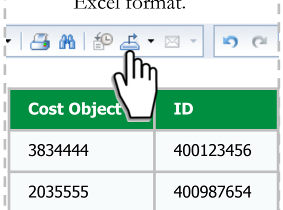
D. Select Row: Populates cost object text box with cost objects listed in selected row.

Additional Options (Continued)

Option 2 Use the Input Controls button to access transaction type filters.



Option 3 Use the Export button to save the report in Excel format.



Option 4 Use the Refresh button to update the results or modify the report selections.