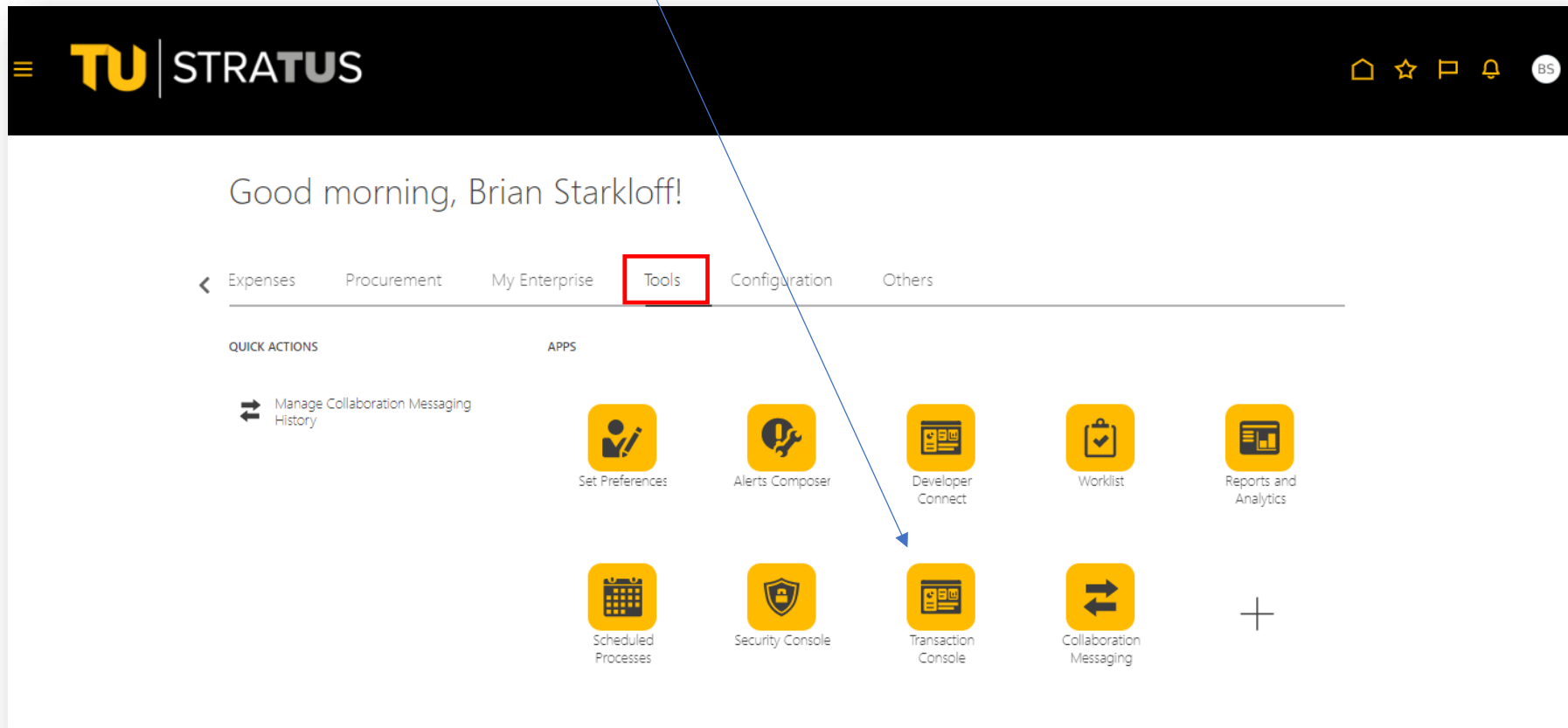


How to use the Transaction Console

The Transaction Console allows users to view the workflow information for transactions. You can view transactions from the following workflows: Expense Approval, Invoice Approval, Requisition Approval, Purchasing Document Approval, Journal Approvals, and Account Coding.

Navigate to Tools, and select the tile for Transaction Console



You have a variety of search options here, including the main search box at the top left. You can search for the form number in this field. Here are examples of form numbers that can be used for this search based on the Process Name:

- Expense Approval – Expense Report Number (EXP0000XXXXXXXX)
- Invoice Approval – Invoice Number
- Requisition Approval – Requisition Number (REQ000XXXX)
- Purchasing Document Approval – Purchase Order Number (PO TOW000XXXX)
- Journal Approval – Journal Batch
- Account Coding – Invoice Number

The screenshot shows the 'Transaction Manager: Transactions' interface. At the top left, there is a search box labeled 'Search...' which is highlighted with a red rectangle. To the right of the search box is a 'Hide Filters' button. Below the search box, there are sections for 'Saved Search' (with a dropdown menu set to 'Default Criteria' and a 'Save' button) and 'Filters' (with a 'Reset' button and a gear icon). The main area contains a table of transactions with columns for Name, Status, Process Name, Submitted On, Assignees, and Submitted By. The table is filtered to show transactions from the last 3 months. The table contains 13 rows of transaction data.

Name	Status	Process Name	Submitted On	Assignees	Submitted By
AL-TEST Spreadsheet A 3000...	Completed	Journal Approval	2/20/24		Alberto Lagos
PO TOW0002070_0	Pending	Purchasing Document Approval	2/13/24	Eric Jones	Oreoluwa Oyelaja
Requisition REQ0003459	Completed	Requisition Approval	2/13/24		Oreoluwa Oyelaja
ADORE021324 TEST Spreadsh...	Pending	Journal Approval	2/13/24	Brian Bunker	Ashley Dore
Reverses CSD SSP to Pasion I...	Completed	Journal Approval	1/30/24		Brian Bunker
BPB-103024-Test04 30-JAN-2...	Completed	Journal Approval	1/30/24		Brian Bunker
BPB-013024-01 Spreadsheet ...	Completed	Journal Approval	1/30/24		Brian Bunker
BPB-TEST03024-01 Spreadsh...	Completed	Journal Approval	1/30/24		Brian Bunker
16643 A Test	Pending	Invoice Approval	1/30/24	Dan Fox	Ashley Dore
Reverses 10 West Guest Mitc...	Completed	Journal Approval	1/30/24		Brian Bunker
BPB-TEST012923 Spreadshee...	Completed	Journal Approval	1/30/24		Brian Bunker
BPB-TEST0129-02 29-JAN-20...	Completed	Journal Approval	1/29/24		Brian Bunker

In the example below, we will search for a Requisition.

Type the Requisition number in the search box, then click the search icon. When your results populate, select the workflow that you want to view by clicking on the Name in blue.

The screenshot shows the 'Transaction Manager: Transactions' interface. At the top, there is a search bar containing 'REQ0004641' and a search icon. Below the search bar, there are filter options: 'Status' and 'Pending'. The main area displays a table of transactions. The table has columns for 'Name', 'Status', 'Process Name', 'Submitted On', 'Assignees', and 'Submitted By'. The first row in the table is 'Requisition REQ0004641', which is highlighted with a red box. The status is 'Pending' (indicated by a blue circle with a white 'P'). The process name is 'Requisition Approval', submitted on '8/15/24', and assigned to 'TU Office of Technology Servi...'. The submitter is 'Naga Sai Nikhita Vegesna'. On the left side, there are sections for 'Saved Search' (Default Criteria) and 'Filters' (Status: Pending). The 'Status' filter is expanded, showing 'Completed', 'Draft', 'Failed', and 'Pending' (which is selected).

Name	Status	Process Name	Submitted On	Assignees	Submitted By
Requisition REQ0004641	Pending	Requisition Approval	8/15/24	TU Office of Technology Servi...	Naga Sai Nikhita Vegesna

Here you can view the approval history, as well as comments and attachments.

If you click on View Transaction History, you can see a timeline of events for the selected workflow.

Requisition Approval : Requisition REQ0004641

Actions **View Transaction History**

Status: Pending Submitted On: 8/15/24
Process Name: Requisition Approval Submitted By: Naga Sai Nikhita Vegesna
Transaction ID: Requisition REQ0004641, 300000078740236

Approval History

Approvals

Assigned to TU Office of Technology Services Group	8/15/24 1:13 PM
↑	
Approved by Gina Peach	8/15/24 1:13 PM
↑	
Submitted by Naga Sai Nikhita Vegesna	8/15/24 10:34 AM

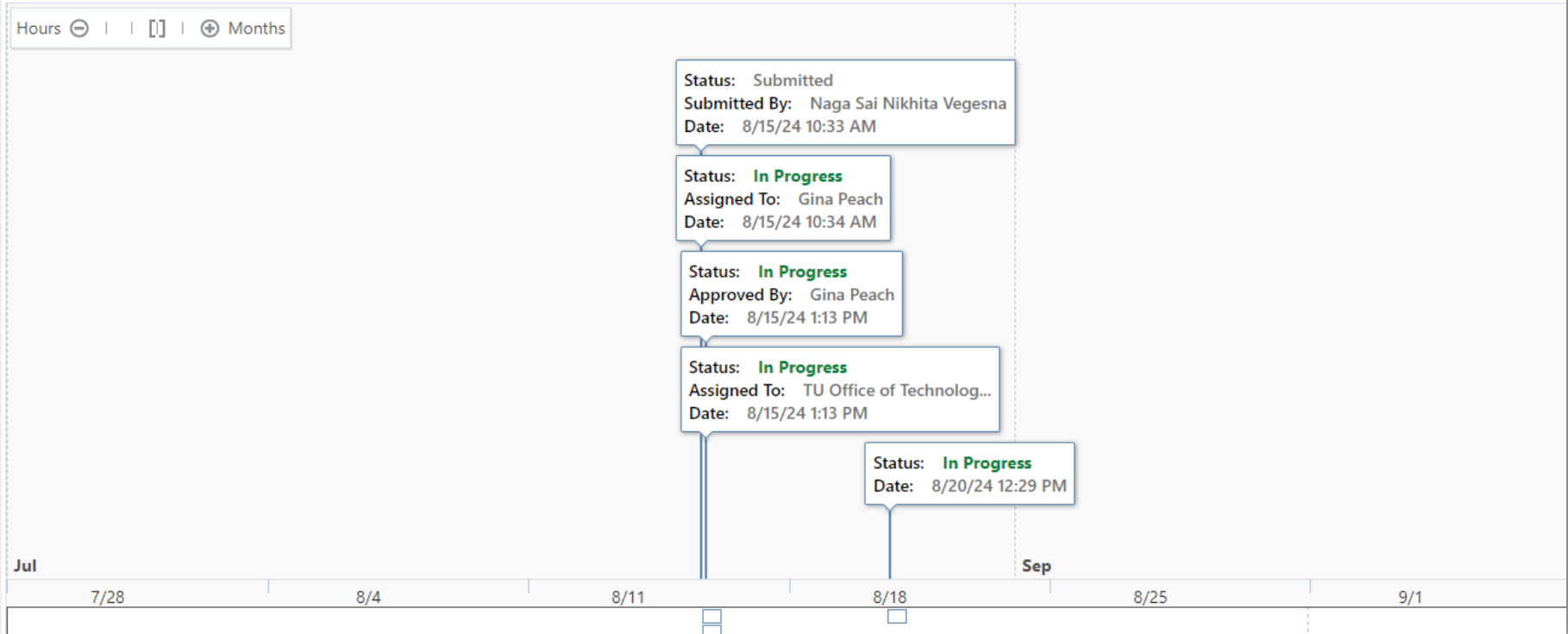
Comments and Attachments

Applications Development Framework Application Identity for Procurement: [REQ0004641.pdf](#)
8/15/24 10:34 AM

< Requisition Approval : Requisition REQ0004641

Applications Development Framework Application Identity for Procurement: [REQ0004641.pdf](#)
8/15/24 10:34 AM

Transaction History



To Navigate back to the home page of the Transaction Console, click the left arrow button in the top left corner of the screen.



You can also search by Status.

You can view Pending and Completed transactions by clicking on the applicable name in the Status section.

The screenshot shows the 'Transaction Manager: Transactions' interface. At the top, there is a search bar and a 'Last Refresh 2/21/24 1:00 PM' indicator. Below the search bar, there are sections for 'Saved Search' (Default Criteria) and 'Filters' (Expand All, Collapse All). The 'Status' filter is highlighted with a red box and includes options: Completed, Draft, Failed, and Pending. The main table displays a list of transactions with columns: Name, Status, Process Name, Submitted On, Assignees, and Submitted By. The table contains 13 rows of transaction data.

Name	Status	Process Name	Submitted On	Assignees	Submitted By
AL-TEST Spreadsheet A 3000...	Completed	Journal Approval	2/20/24		Alberto Lagos
PO TOW0002070_0	Pending	Purchasing Document Approval	2/13/24	Eric Jones	Oreoluwa Oyelaja
Requisition REQ0003459	Completed	Requisition Approval	2/13/24		Oreoluwa Oyelaja
ADORE021324 TEST Spreads...	Pending	Journal Approval	2/13/24	Brian Bunker	Ashley Dore
Reverses CSD SSP to Pasion I...	Completed	Journal Approval	1/30/24		Brian Bunker
BPB-103024-Test04 30-JAN-2...	Completed	Journal Approval	1/30/24		Brian Bunker
BPB-013024-01 Spreadsheet ...	Completed	Journal Approval	1/30/24		Brian Bunker
BPB-TEST03024-01 Spreadsh...	Completed	Journal Approval	1/30/24		Brian Bunker
16643 A Test	Pending	Invoice Approval	1/30/24	Dan Fox	Ashley Dore
Reverses 10 West Guest Mitc...	Completed	Journal Approval	1/30/24		Brian Bunker
BPB-TEST012923 Spreadshee...	Completed	Journal Approval	1/30/24		Brian Bunker
BPB-TEST0129-02 29-JAN-20...	Completed	Journal Approval	1/29/24		Brian Bunker

Status Definitions

- Completed – Form has been approved or withdrawn.
- Draft – Form has not entered a workflow.
- Failed – Error routing into a workflow. Contact the Stratus Financials Team.
- Pending – Pending Approval/Action.

In the example below, we will search for Pending Transactions.

Click on “Pending” under Status. Pending workflows will then populate.

Transaction Manager: Transactions Last Refresh 8/20/24 11:01 AM

Search... Hide Filters Status Pending x

Saved Search: Default Criteria Save

Filters: Reset Expand All | Collapse All

Filters:

- Status Clear
 - Completed
 - Draft
 - Failed
 - Pending**
- Name
- Process Name
- Submitted By
- Person Number

Actions Transactions From 6 Months

<input type="checkbox"/>		Name	Status	Process Name	Submitted On	Assignees	Submitted By
<input type="checkbox"/>		Requisition REQ0004641	P	Requisition Approval	8/15/24	TU Office of Technology Servi...	Naga Sai Nikhita Vegesna
<input type="checkbox"/>		HUZ-00691	P	Account Coding	8/6/24	Jamie Gillispie	Lauren Rowe
<input type="checkbox"/>		952099517_00	P	Account Coding	8/5/24	Nicole Kress	Lauren Rowe
<input type="checkbox"/>		C25198	P	Account Coding	8/5/24	Robyn McCray	Lauren Rowe
<input type="checkbox"/>		850451513000121JY24	P	Account Coding	8/5/24	Teresa Cromwell	Lauren Rowe
<input type="checkbox"/>		850460006000167JY24	P	Account Coding	8/5/24	Teresa Cromwell	Lauren Rowe
<input type="checkbox"/>		EXP000078755134	P	Expense Approval	7/15/24	Terry Cooney, Margo Stebbin...	Margo Stebbins

You can use the Transactions From drop down to modify the date range for your transaction search.

The screenshot shows the 'Transaction Manager: Transactions' interface. At the top, there is a search bar and a 'Last Refresh 2/21/24 1:00 PM' indicator. Below the search bar, there are sections for 'Saved Search' (with 'Default Criteria' and a 'Save' button) and 'Filters' (with 'Expand All' and 'Collapse All' options). The main area is a table of transactions with columns: Name, Status, Process Name, Submitted On, Assignees, and Submitted By. A dropdown menu for 'Transactions From' is highlighted with a red box, showing '3 Months' selected. The table contains 12 rows of transaction data.

	Name	Status	Process Name	Submitted On	Assignees	Submitted By
<input type="checkbox"/>	AL-TEST Spreadsheet A 3000...	✓	Journal Approval	2/20/24		Alberto Lagos
<input type="checkbox"/>	PO TOW0002070_0	⌚	Purchasing Document Approval	2/13/24	Eric Jones	Oreoluwa Oyelaja
<input type="checkbox"/>	Requisition REQ0003459	✓	Requisition Approval	2/13/24		Oreoluwa Oyelaja
<input type="checkbox"/>	ADORE021324 TEST Spread...	⌚	Journal Approval	2/13/24	Brian Bunker	Ashley Dore
<input type="checkbox"/>	Reverses CSD SSP to Pasion 1...	✓	Journal Approval	1/30/24		Brian Bunker
<input type="checkbox"/>	BPB-103024-Test04 30-JAN-2...	✓	Journal Approval	1/30/24		Brian Bunker
<input type="checkbox"/>	BPB-013024-01 Spreadsh...	✓	Journal Approval	1/30/24		Brian Bunker
<input type="checkbox"/>	BPB-TEST03024-01 Spreadsh...	✓	Journal Approval	1/30/24		Brian Bunker
<input type="checkbox"/>	16643 A Test	⌚	Invoice Approval	1/30/24	Dan Fox	Ashley Dore
<input type="checkbox"/>	Reverses 10 West Guest Mitc...	✓	Journal Approval	1/30/24		Brian Bunker
<input type="checkbox"/>	BPB-TEST012923 Spreadsh...	✓	Journal Approval	1/30/24		Brian Bunker
<input type="checkbox"/>	BPB-TEST0129-02 29-JAN-20...	✓	Journal Approval	1/29/24		Brian Bunker

You can also search transactions by who submitted the form.

Transaction Manager: Transactions Last Refresh 8/20/24 11:01

Search... Hide Filters

Saved Search: Default Criteria Actions ▾ Transactions From 6 Months ▾

Filters:

Filters:

- Status
 - Completed
 - Draft
 - Failed
 - Pending
- Name
- Process Name
- Submitted By**
- Person Number

		Name	Status	Process Name	Submitted On	Assignees	Submitted By
<input type="checkbox"/>	<input type="button" value="Refresh"/>	EXP000078742234	✓	Expense Approval	8/16/24		Naga Sai Nikhita Vegesna
<input type="checkbox"/>	<input type="button" value="Refresh"/>	PO TOW0002757_0	✓	Purchasing Document Appr...	8/15/24		Naga Sai Nikhita Vegesna
<input type="checkbox"/>	<input type="button" value="Refresh"/>	Requisition REQ0004641	ⓘ	Requisition Approval	8/15/24	TU Office of Technology Serv...	Naga Sai Nikhita Vegesna
<input type="checkbox"/>	<input type="button" value="Refresh"/>	Requisition REQ0004640	✓	Requisition Approval	8/15/24		Naga Sai Nikhita Vegesna
<input type="checkbox"/>	<input type="button" value="Refresh"/>	Requisition REQ0004640	✓	Requisition Approval	8/15/24		Naga Sai Nikhita Vegesna
<input type="checkbox"/>	<input type="button" value="Refresh"/>	PO TOW0002756_0	✓	Purchasing Document Appr...	8/15/24		Naga Sai Nikhita Vegesna
<input type="checkbox"/>	<input type="button" value="Refresh"/>	Requisition REQ0004639	✓	Requisition Approval	8/15/24		Naga Sai Nikhita Vegesna
<input type="checkbox"/>	<input type="button" value="Refresh"/>	PO TOW0002755_1	✓	Purchasing Document Appr...	8/14/24		Naga Sai Nikhita Vegesna
<input type="checkbox"/>	<input type="button" value="Refresh"/>	PO TOW0002755_0	✓	Purchasing Document Appr...	8/14/24		Naga Sai Nikhita Vegesna
<input type="checkbox"/>	<input type="button" value="Refresh"/>	TEST BS 682	✓	Journal Approval	8/9/24		Brenda Smith
<input type="checkbox"/>	<input type="button" value="Refresh"/>	TEST BS 682	✓	Journal Approval	8/9/24		Brenda Smith
<input type="checkbox"/>	<input type="button" value="Refresh"/>	TEST BS 677	✓	Journal Approval	8/9/24		Brenda Smith
<input type="checkbox"/>	<input type="button" value="Refresh"/>	BS063024 Accrual Spreadshe...	✓	Journal Approval	8/9/24		Brenda Smith
<input type="checkbox"/>	<input type="button" value="Refresh"/>	HUZ-00691	ⓘ	Account Coding	8/6/24	Jamie Gillispie	Lauren Rowe
<input type="checkbox"/>	<input type="button" value="Refresh"/>	952099517_00	ⓘ	Account Coding	8/5/24	Nicole Kress	Lauren Rowe
<input type="checkbox"/>	<input type="button" value="Refresh"/>	C25198	ⓘ	Account Coding	8/5/24	Robyn McCray	Lauren Rowe

In the example below, we will search for forms submitted by Lauren Rowe within the past 6 months.

Click on the Transactions from drop down and select "6 Months". Type "Lauren Rowe" in the Submitted by search. Click the search icon. The results will then populate.

The screenshot shows the 'Transaction Manager: Transactions' interface. At the top, there is a search bar and a filter for 'Submitted By' set to 'Lauren Rowe'. On the left, there are filter sections for 'Status' (Completed, Draft, Failed, Pending), 'Name', 'Process Name', 'Submitted By' (highlighted with a red box), and 'Person Number'. The 'Submitted By' filter is set to 'Lauren Rowe'. On the right, there is a 'Transactions From' dropdown menu set to '6 Months' (highlighted with a red box). Below the filters is a table of transactions with columns: Name, Status, Process Name, Submitted On, Assignees, and Submitted By.

Name	Status	Process Name	Submitted On	Assignees	Submitted By
HUZ-00691	Completed	Account Coding	8/6/24	Jamie Gillispie	Lauren Rowe
952099517_00	Completed	Account Coding	8/5/24	Nicole Kress	Lauren Rowe
C25198	Completed	Account Coding	8/5/24	Robyn McCray	Lauren Rowe
850451513000121JY24	Completed	Account Coding	8/5/24	Teresa Cromwell	Lauren Rowe
850460006000167JY24	Completed	Account Coding	8/5/24	Teresa Cromwell	Lauren Rowe

You can narrow down your search even further by searching by the process name (i.e. Expense Approval, Invoice Approval, Requisition Approval, Purchasing Document Approval, Journal Approval, or Account Coding).

The screenshot shows the 'Transaction Manager: Transactions' interface. On the left, there are filter sections for Status, Name, Process Name, Submitted By, and Person Number. The 'Process Name' filter is highlighted with a red box. The main table displays a list of transactions with columns for Name, Status, Process Name, Submitted On, Assignees, and Submitted By. The table is filtered to show transactions from the last 3 months.

Name	Status	Process Name	Submitted On	Assignees	Submitted By
AL-TEST Spreadsheet A 3000...	✓	Journal Approval	2/20/24		Alberto Lagos
PO TOW0002070_0	⚠	Purchasing Document Approval	2/13/24	Eric Jones	Oreoluwa Oyelaja
Requisition REQ0003459	✓	Requisition Approval	2/13/24		Oreoluwa Oyelaja
ADORE021324 TEST Spread...	⚠	Journal Approval	2/13/24	Brian Bunker	Ashley Dore
Reverses CSD SSP to Pasion I...	✓	Journal Approval	1/30/24		Brian Bunker
BPB-103024-Test04 30-JAN-2...	✓	Journal Approval	1/30/24		Brian Bunker
BPB-013024-01 Spreadsheet ...	✓	Journal Approval	1/30/24		Brian Bunker
BPB-TEST03024-01 Spreadsh...	✓	Journal Approval	1/30/24		Brian Bunker
16643 A Test	⚠	Invoice Approval	1/30/24	Dan Fox	Ashley Dore
Reverses 10 West Guest Mitc...	✓	Journal Approval	1/30/24		Brian Bunker
BPB-TEST012923 Spreadshee...	✓	Journal Approval	1/30/24		Brian Bunker
BPB-TEST0129-02 29-JAN-20...	✓	Journal Approval	1/29/24		Brian Bunker
BPB-TEST012923 Spreadshee...	✓	Journal Approval	1/29/24		Brian Bunker
DEC01208Test	⚠	Invoice Approval	1/29/24	Peko Tsuji	Ashley Dore
Test4:1-24-24	✓	Invoice Approval	1/24/24		Nilia Ford
Test3:1-24-24	✓	Invoice Approval	1/24/24		Nilia Ford

In the example below, we will search for the Requisition Approval Process.

Type “Requisition Approval” in the Process Name Search. Click the search icon. The results will then populate.

Transaction Manager: Transactions Last Refresh 8/20/24 11:01 AM

Search... Hide Filters Process Name Requisition Approval X

Saved Search: Default Criteria Save

Filters: Reset Expand All | Collapse All

Filters:

- Status
 - Completed
 - Draft
 - Failed
 - Pending
- Name
- Process Name** Clear
- Submitted By
- Person Number

Actions Transactions From 6 Months

		Name	Status	Process Name	Submitted On	Assignees	Submitted By
<input type="checkbox"/>	<input type="button" value="↺"/>	Requisition REQ0004641	🔴	Requisition Approval	8/15/24	TU Office of Technology Servi...	Naga Sai Nikhita Vegesna
<input type="checkbox"/>	<input type="button" value="↺"/>	Requisition REQ0004640	🟢	Requisition Approval	8/15/24		Naga Sai Nikhita Vegesna
<input type="checkbox"/>	<input type="button" value="↺"/>	Requisition REQ0004640	🟢	Requisition Approval	8/15/24		Naga Sai Nikhita Vegesna
<input type="checkbox"/>	<input type="button" value="↺"/>	Requisition REQ0004639	🟢	Requisition Approval	8/15/24		Naga Sai Nikhita Vegesna
<input type="checkbox"/>	<input type="button" value="↺"/>	Requisition REQ0004635	🟢	Requisition Approval	7/23/24		Naga Sai Nikhita Vegesna
<input type="checkbox"/>	<input type="button" value="↺"/>	Requisition REQ0004633	🟢	Requisition Approval	7/23/24		Naga Sai Nikhita Vegesna
<input type="checkbox"/>	<input type="button" value="↺"/>	Requisition REQ0004632	🟢	Requisition Approval	7/23/24		Naga Sai Nikhita Vegesna
<input type="checkbox"/>	<input type="button" value="↺"/>	Requisition REQ0004629	🟢	Requisition Approval	7/10/24		Naga Sai Nikhita Vegesna