Institutional Research &
Advanced Analytics

Hand in Hand

Travel Reports

University of Kentucky

Agenda

- **Intro to Tableau**
  - Access
  - Navigation

- **Travel Expense Report**
  - Purpose
  - Report Tour
  - Personalized Views
  - Print to PDF or Export Data

- **Additional Resources**
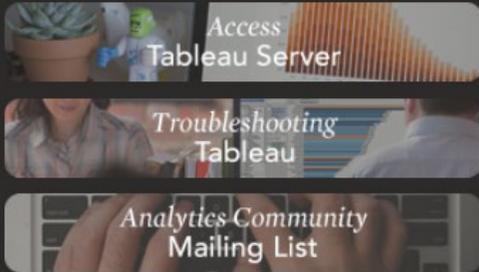
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Intro to Tableau

Getting to Tableau

- Go to Analytics.uky.edu

- Log in with your linkblue username & password

- If you don't have access, go to bottom of www.uky.edu/iraa

- Complete the Request Access to Tableau Server form and reference the Travel Project

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tableau

If you are in the Medical Center (MC) domain, you will need to add the prefix "**MC**" before your linkblue username *(e.g., MC\abchan091 or MC\jwoswa095).*

Username

Password

Sign In →

Structure of Tableau

Structure of Tableau

Workbooks are custom built reports created by IRAA or Super Users

Like Excel Workbooks

Structure of Tableau

Finding the Travel Expense Report

- Search any of the following
- Project: Travel
- Workbooks: Travel Expense Reports
- Tags: Travel
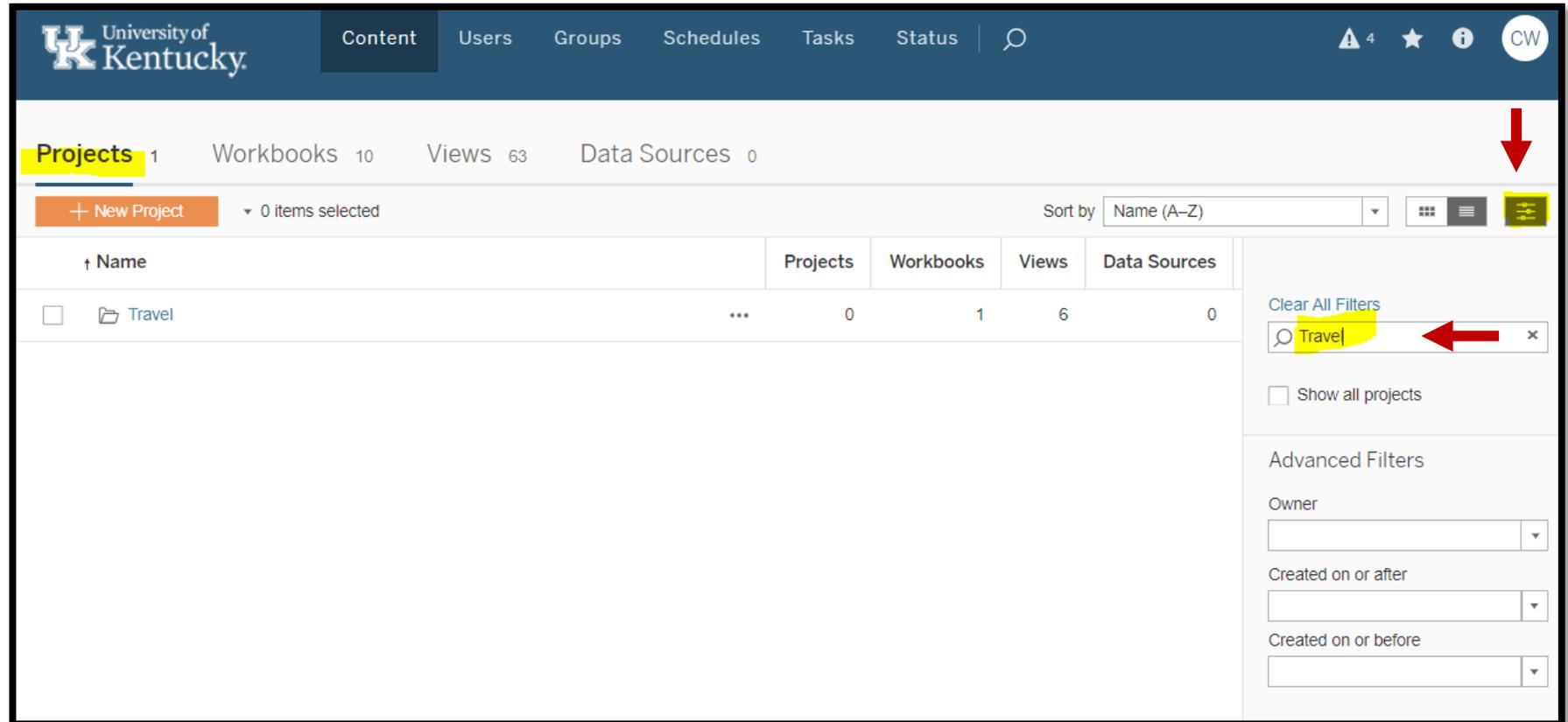
Favorite the Workbook

- Favorite a workbook for quick access by clicking the star to the left
- View all starred workbooks using the top right of navigation pane
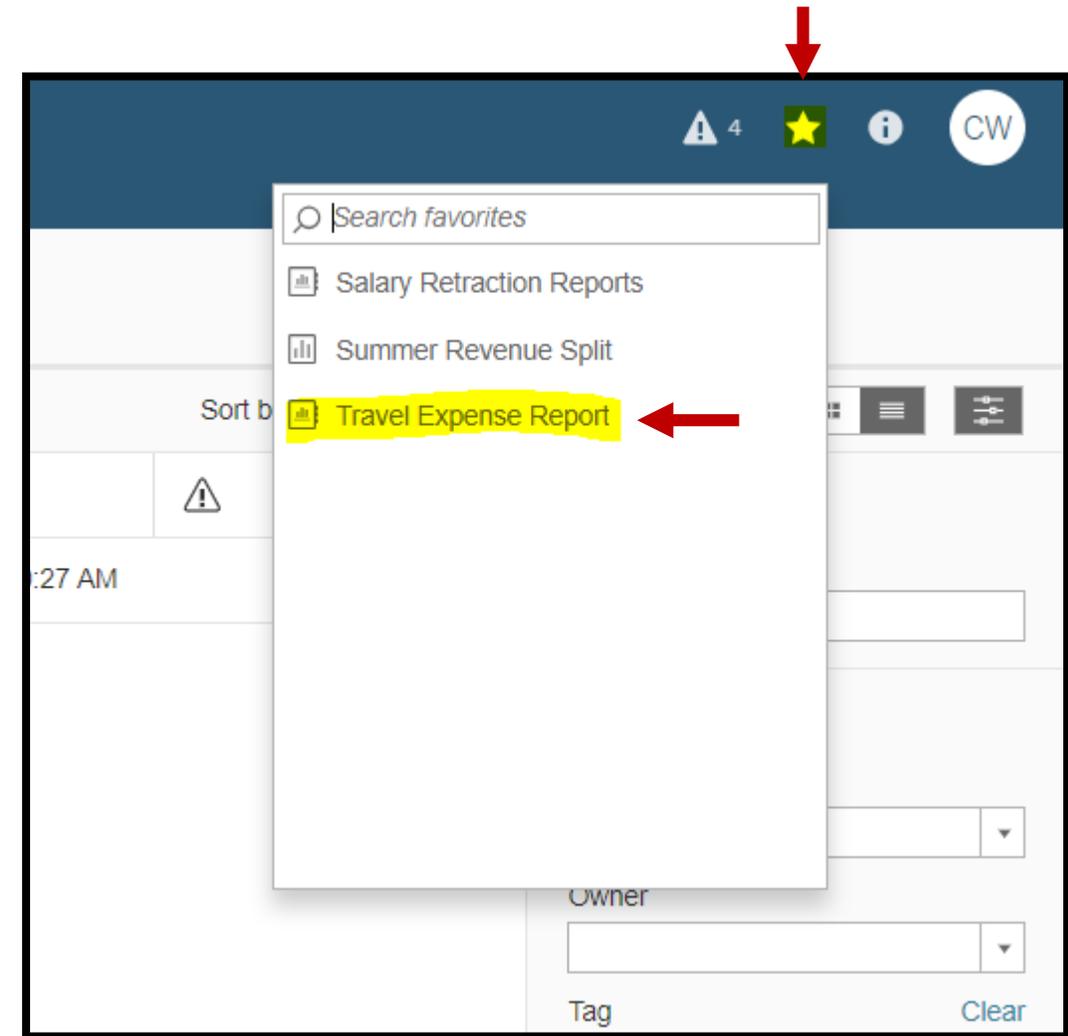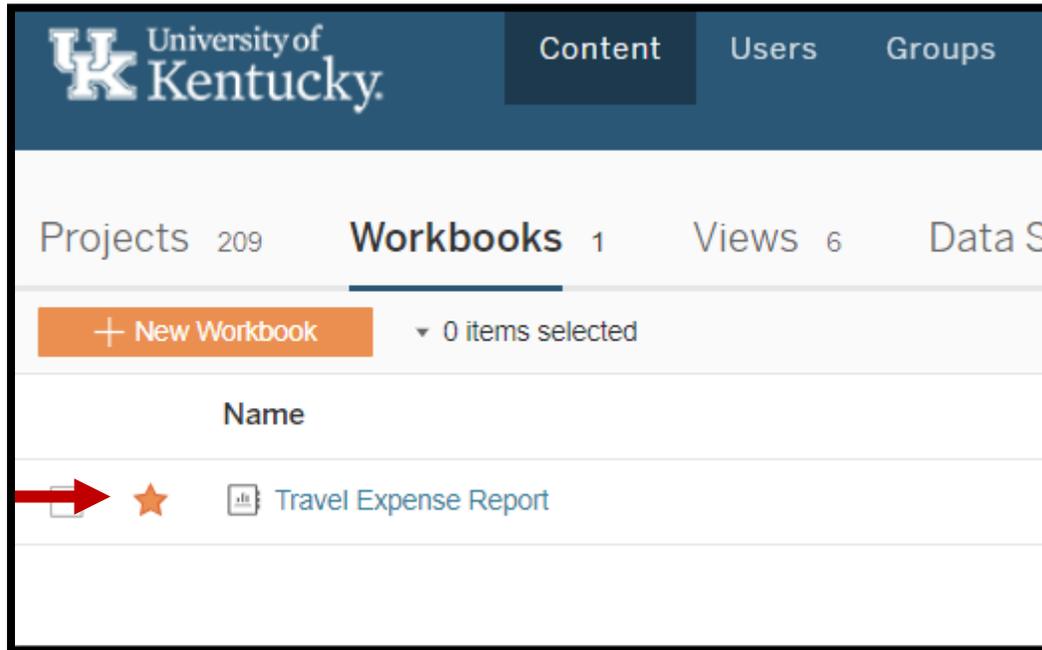
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Travel Expense Report

Travel Expense Reports

	HR Total Travel Expense	HR Reimbursed Cost Assignment	FI Reimbursed Cost Assignment
Purpose:	*All travel expenses, including per diems and mileage*	*Reimbursable costs*	*Reimbursable costs*
Organized by:	*Traveler's HR Department*	*Traveler's HR Department*	*FI Department paying for cost assignment*
Level of Detail:	*One row per trip, per traveler and payment method*	*One row per trip, traveler, per cost assignment*	*One row per trip, traveler, per cost assignment*

Navigating the Report

1. **Start Page – HR**
   Controls HR tabs

2. **Filter using drop-down**
   Unselect All
   Click Apply
   Hold Shift to select multiples

3. **Type in dates or use slider**

4. **Start Page – FI**
   Controls FI tab
   Same filters, but FI Department

HR Total Travel Expense

- Trip attributes like start/end date plus all expense amounts

TRAVEL EXPENSE TYPES	FLAT RATES	OTHER AMOUNTS
AIRFARE	*MILEAGE*	*PAY ONLY REDUCTION*
BAGGAGE FEES	*MEALS PER DIEM*	*PAY ONLY AMOUNT*
GROUND TRANSPORTATION		*PAYMENT AMOUNT*
		REIMBURSEMENT AMOUNT
LODGING		
PARKING & TOLLS		
CAR RENTAL		
GASOLINE (Rental Car Only)		
INT'L LODGING > PER DIEM		
OTHER EXPENSES		
REGISTRATION FEES		
SPECIAL MEALS/REQUIRED BANQUET		
SUBTOTAL RECEIPTS	SUBTOTAL MEALS PER DIEM & MILEAGE	

TOTAL TRIP COST

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Reimbursed Cost Assignment

- Shows reimbursed cost assignment
- Note you can apply additional filters on cost center, wbs element, etc.

Saving Time

- ## Pause when setting lots of filters
  - Similar to Excel's "Manual Calculations"
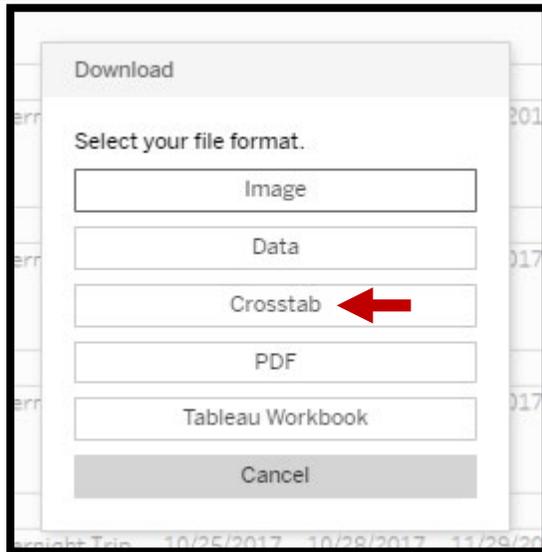 - Click Pause > Set Filters > Click Resume again to refresh the data
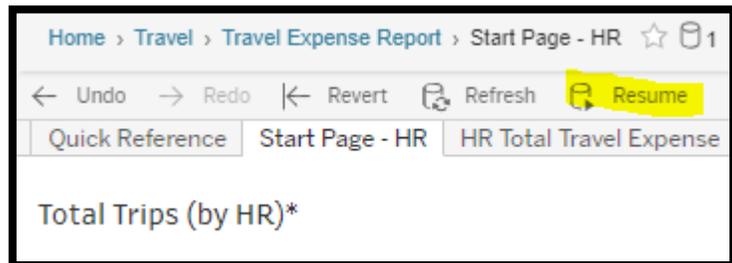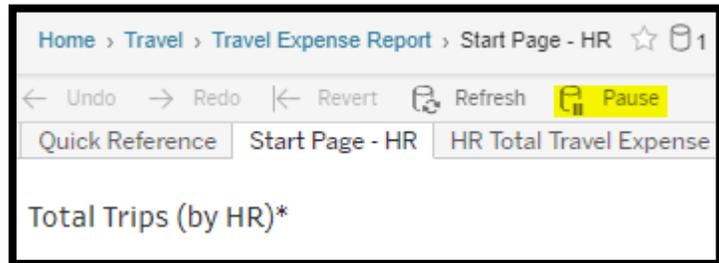
- ## Create a custom view
  - Set your commonly used filter settings on the Start Page
  - Go to View (top right)
  - Enter a name and choose whether to make it your default
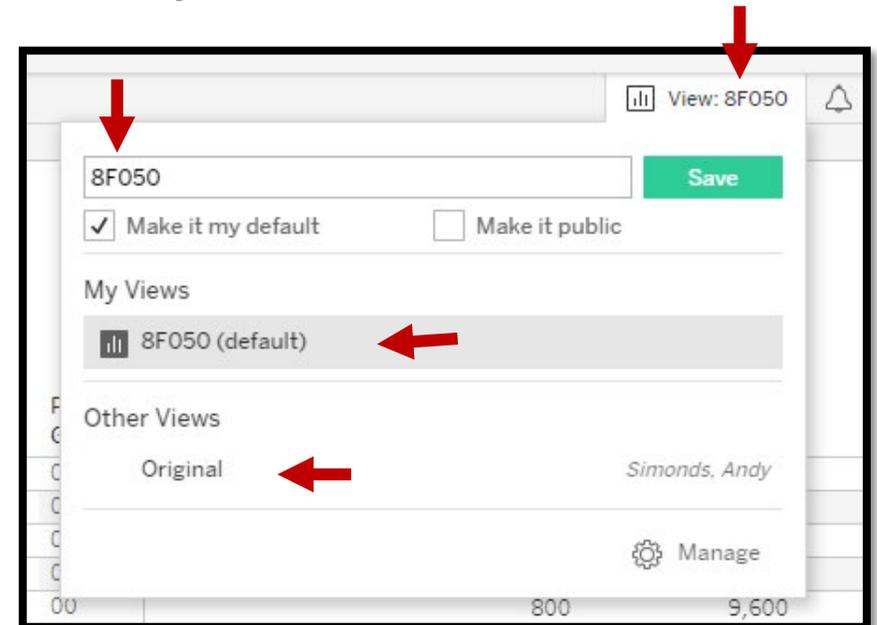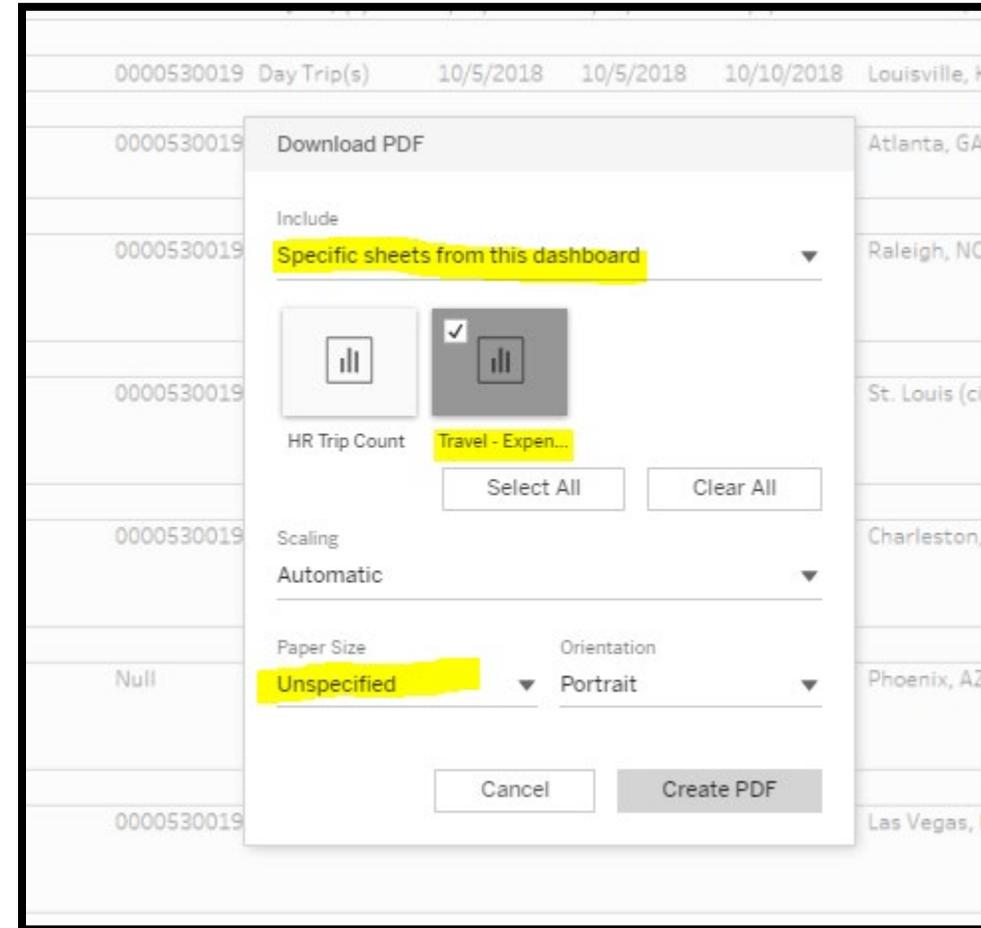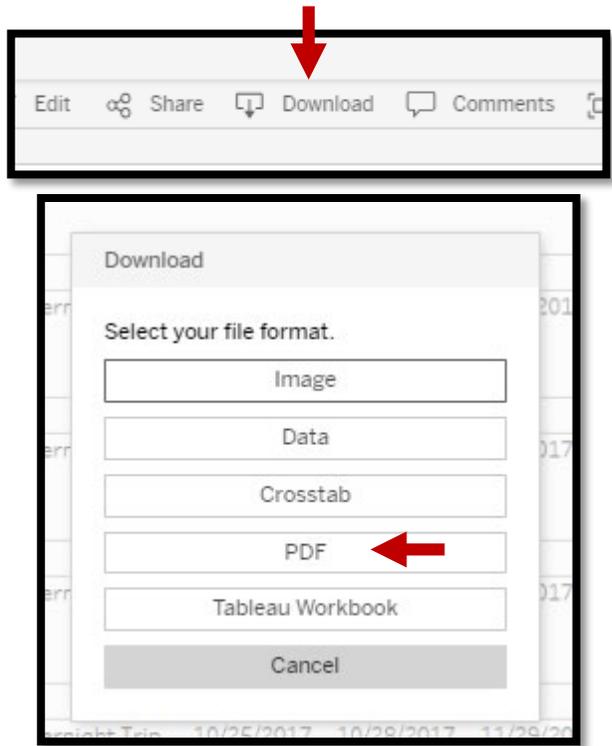
Download to Excel

- Download > Crosstab. If Crosstab is grayed out, click inside the data table. Then go to Download and Crosstab should be an option

- Note that Subtotal rows are included. Filter them out if not needed.

Download to PDF

- Download > PDF
- Include: Specific sheets from this dashboard
- Paper Size: Unspecified

Let's Talk

- ## About Tableau
  - Check out the Quick Reference Card (here)
  - Tableau Server resource page (http://www.uky.edu/iraa/tableau/
  - Open Labs 1st and 3rd Fridays   (http://www.uky.edu/iraa/open-labs)
  - Reach out (analytics@uky.edu)

- ## About TRIP Reimbursement
  - Contact Travel Services at 859-257-5437 or email trip@uky.edu