

Institutional Research &  
Advanced Analytics

# Hand in Hand

Travel Reports

# Agenda

- **Intro to Tableau**
  - Access
  - Navigation
  
- **Travel Expense Report**
  - Purpose
  - Report Tour
  - Personalized Views
  - Print to PDF or Export Data
  
- **Additional Resources**

1

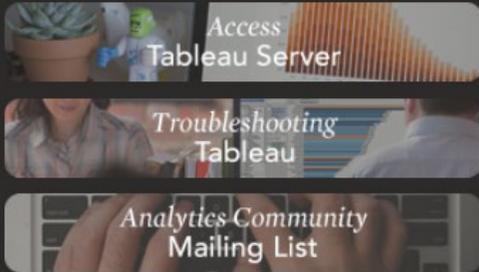
# Intro to Tableau

# Getting to Tableau

- Go to [Analytics.uky.edu](https://analytics.uky.edu)
- Log in with your linkblue username & password
- If you don't have access, go to bottom of [www.uky.edu/iraa](https://www.uky.edu/iraa)
- Complete the Request Access to Tableau Server form and reference the Travel Project

## Useful Links

- [Request Access to Tableau Server](#)
- [Request Access to SAP HANA](#)
- [Website Question or Feedback](#)
- [External Websites](#)





# University of Kentucky



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\jwaswa095).

# Structure of Tableau

Projects 182 Workbooks 2,645 Views 11,708 Data Sources 65

Sort by Name (A-Z)

Name	Workbooks	Views	Data Sources	Owner	Created
...	3	21	0	Claunch, Debra	Oct 5, 2016, 9:22 AM
...	16	41	2	Claunch, Debra	May 18, 2017, 7:32 AM
...	54	105	0	Claunch, Debra	Feb 2, 2015, 10:14 AM
...	66	301	4	Burr, Stephen	Feb 11, 2014, 8:16 AM
...	3	12	0	Claunch, Debra	Feb 6, 2017, 3:04 PM
...	2	2	0	Claunch, Debra	Jul 28, 2015, 8:02 AM
...	3	9	0	Claunch, Debra	Oct 10, 2017, 3:26 PM
Auxiliary Services - Administration	4	27	0	Claunch, Debra	Nov 13, 2017, 7:52 AM
Business Officer Reports	4	9	0	Claunch, Debra	Jun 20, 2017, 12:44 PM
Campus Safety	4	54	0	Burr, Stephen	Nov 10, 2014, 11:09 AM
Career Advising	3	4	0	Claunch, Debra	Nov 17, 2016, 7:50 AM
CARES	9	22	0	Claunch, Debra	Mar 15, 2016, 11:21 AM
CATS SeeSafety	6	33	0	Recktenwald, Adam J	Mar 11, 2015, 4:31 PM
Center for Clinical and Translational Science (CCTS)	1	3	0	Claunch, Debra	Aug 15, 2016, 11:47 AM
Center for the Enhancement of Learning and Teaching (CELT)	36	103	1	Claunch, Debra	Feb 20, 2017, 3:35 PM
College of Agriculture, Food and Environment	16	89	1	Burr, Stephen	Nov 20, 2013, 2:23 PM
College of Agriculture, Food and Environment - Cooperative Extension Service	3	6	0	Claunch, Debra	Nov 2, 2016, 7:45 AM
College of Agriculture, Food and Environment - HR	2	2	0	Claunch, Debra	Sep 2, 2015, 1:24 PM
College of Arts & Sciences	221	915	6	Burr, Stephen	Nov 21, 2013, 2:32 PM
College of Arts & Sciences ADVANCE grant	1	3	0	Starkey, Mary Kathryn	Dec 23, 2015, 9:47 AM

Projects are collections of similar files  
Like a folder

# Structure of Tableau

The screenshot displays the Tableau interface for the University of Kentucky. The top navigation bar includes the University of Kentucky logo, a search bar, and the user name 'Conner Whitney'. Below this, the main navigation area shows 'Projects 182', 'Workbooks 2,645', 'Views 11,708', and 'Data Sources 65'. The 'Workbooks' tab is selected, and a list of workbooks is displayed. A callout bubble points to the 'Workbooks' tab and contains the text: 'Workbooks are custom built reports created by IRAA or Super Users' and 'Like Excel Workbooks'.

Name	Views: All	Sheets	Size	Project	Owner	Modified
Student Success	10,976	8	1.8 MB	Student Success	Thuringer, Christopher P	Mar 28, 2018, 11:30 AM
Student Reports	5,878	3	77.1 KB	Student Reports	Albers, Shelby D	Dec 5, 2016, 8:38 AM
HRS Screens	1,790	5	37.7 MB	HRS Screens	Hiemstra, Heidi J	May 17, 2017, 4:47 PM
Research & Sponsored Projects	1,897	7	18.6 MB	Research & Sponsored Projects	Wolf, Baron G	May 2, 2018, 10:29 AM
Student Reports	1,047	11	93.5 KB	Student Reports	Albers, Shelby D	Dec 6, 2017, 4:22 PM
Enrollment Management	3,953	17	12.2 MB	Enrollment Management	Kirk, Anne Marie	May 2, 2018, 12:06 PM
Specializations	3,728	6	109.6 KB	Student Reports	Albers, Shelby D	Mar 16, 2017, 3:45 PM
Enrollment Curves by Date	3,127	5	209.0 KB	College of Arts & Sciences	Combs, Michelle S	Apr 18, 2018, 11:18 AM
Institutional Retention Dashboard with Preliminary Data	2,670	7	542.1 KB	Student Reports	Albers, Shelby D	Jan 12, 2018, 11:49 AM
Monthly Reports	2,656	9	25.0 MB	Research & Sponsored Projects	Wolf, Baron G	May 2, 2018, 10:22 AM
Plant Maintenance & Facilities Dashboard	2,544	2	165.8 KB	Facilities Management	Jones, Kevin	Apr 3, 2018, 8:49 AM
Specializations Headcount Detail	2,369	6	138.3 KB	Student Reports Detail	Albers, Shelby D	Mar 13, 2018, 12:06 PM
Major/Minor Demographics and Student Rosters	2,243	6	323.3 KB	College of Arts & Sciences	Combs, Michelle S	Apr 23, 2018, 5:35 PM
Percent of Course Capacity Reached	2,236	3	118.0 KB	College of Arts & Sciences	Combs, Michelle S	Jan 5, 2018, 1:49 PM
Institutional Retention Dashboard with Preliminary Data	1,967	15	594.1 KB	Student Reports Detail	Albers, Shelby D	Jan 12, 2018, 11:50 AM
Incoming Freshmen Dashboard (Admitted, Confirmed, Enrolled Students)	1,865	11	200.6 KB	College of Arts & Sciences	Combs, Michelle S	Apr 18, 2018, 4:17 PM
Instructor SCH	1,791	10	721.2 KB	Student Reports	Albers, Shelby D	Dec 20, 2017, 10:10 AM
Class Rosters - CON15014	1,707	5	743.0 KB	College of Nursing Administration	Hiemstra, Heidi J	Jan 10, 2017, 11:53 AM
Table of Contents Awards	1,673	1	707.3 KB	Research & Sponsored Projects	Wolf, Baron G	May 2, 2018, 10:31 AM
Institutional and Regulatory Enrollment	1,636	17	618.6 KB	Student Reports Detail	Albers, Shelby D	May 1, 2018, 4:59 PM

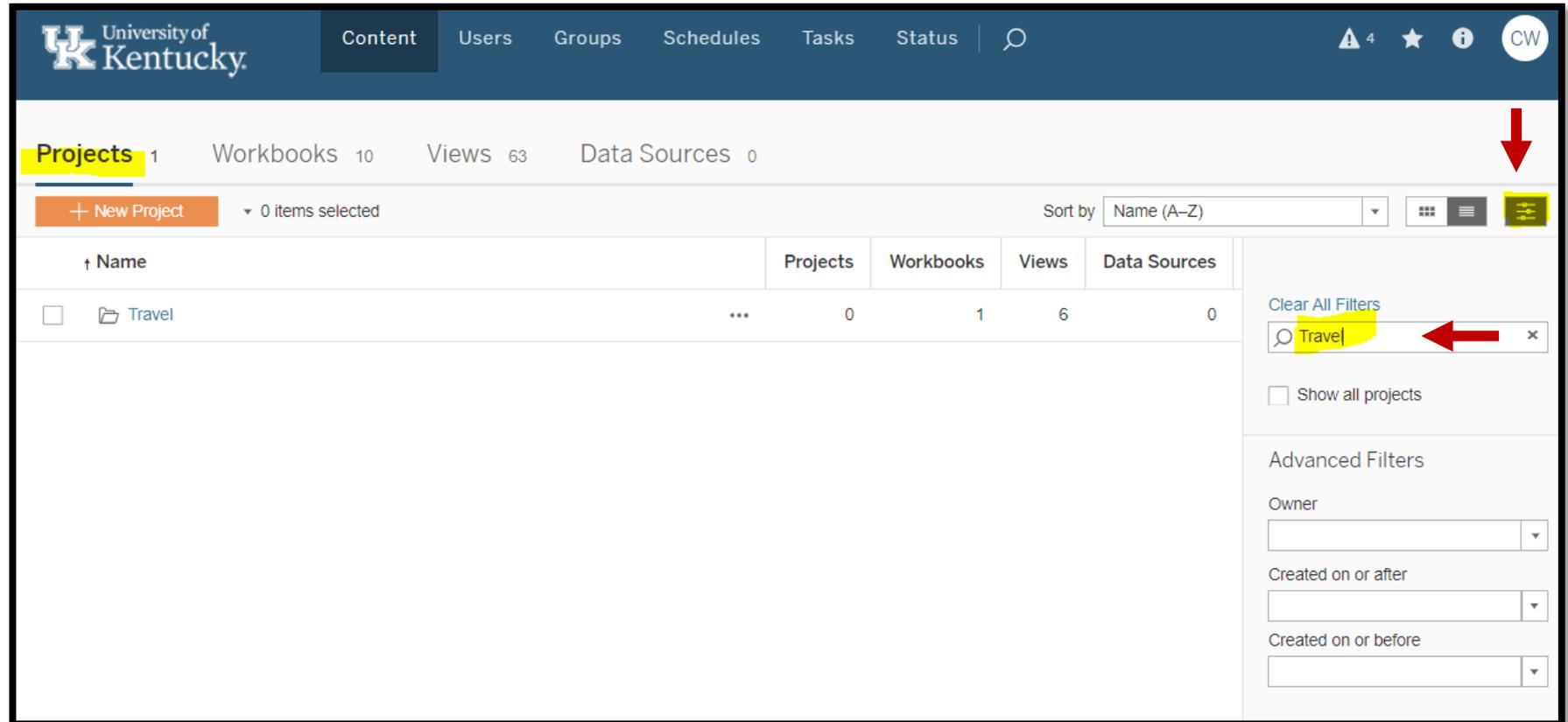
# Structure of Tableau

The screenshot displays the Tableau interface for the University of Kentucky. The top navigation bar includes the University of Kentucky logo, a search bar, and the user name 'Conner Whitney'. Below the navigation bar, there are tabs for 'Projects 182', 'Workbooks 2,645', 'Views 11,708', and 'Data Sources 65'. The 'Views' tab is selected, and a callout bubble points to it with the text: 'Views are like a single sheet in a workbook' and 'Like a sheet in Excel'. The main content area shows a list of views with columns for Name, Views: All, Workbook, Sheet, Project, Owner, and Modified. The list includes various views such as 'About & Filters', 'HANA Code Book', 'Employment Verification L...', 'Work Orders Dashboard', 'Single Course Enrollment H...', 'List of Fields', 'Specializations Headcount', 'Recruiter Dashboard', 'Advisees', 'Contents - Award Reports', 'College Award Summary', 'Registered and Non-Registered List', 'Student Count', 'Course Cap Reached', 'Daily Report', 'Specializations Headcount - Students', 'Section Cap Reached', 'Institutional Retention and Graduation Rates', '2nd Fall Overall', and 'VOE without Salary'. The 'Views: All' column shows the number of views for each, ranging from 936 to 2,210. The 'Workbook' column shows the workbook name, and the 'Sheet' column shows the sheet number. The 'Project' column shows the project name, and the 'Owner' column shows the owner's name. The 'Modified' column shows the date and time the view was last modified.

Name	Views: All	Workbook	Sheet	Project	Owner	Modified
About & Filters			1	Student Success	Thuringer, Christopher P	Mar 28, 2018, 11:30 AM
HANA Code Book			1	Student Reports	Albers, Shelby D	Dec 5, 2016, 8:38 AM
Employment Verification L...			1	HRS Screens	Hiemstra, Heidi J	May 17, 2017, 4:47 PM
Work Orders Dashboard			1	Facilities Management	Jones, Kevin	Apr 2, 2018, 4:39 PM
Single Course Enrollment H...			1	College of Arts & Sciences	Combs, Michelle S	Apr 18, 2018, 11:18 AM
List of Fields			2	Student Reports	Albers, Shelby D	Dec 5, 2016, 8:38 AM
Specializations Headcount	2,210	Specializations Headcount	1	Student Reports	Albers, Shelby D	Mar 16, 2017, 3:45 PM
Recruiter Dashboard	2,015	Recruiter Dashboard	2	Enrollment Management	Kirk, Anne Marie	May 2, 2018, 12:06 PM
Advisees	1,931	Advisor Analytics	4	Student Success	Thuringer, Christopher P	Mar 28, 2018, 11:30 AM
Contents - Award Reports	1,673	Table of Contents Awards	1	Research & Sponsored Projects	Wolf, Baron G	May 2, 2018, 10:31 AM
College Award Summary	1,427	College Award Summary	1	Research & Sponsored Projects	Wolf, Baron G	May 2, 2018, 10:29 AM
Registered and Non-Registered List	1,360	Advisor Analytics	2	Student Success	Thuringer, Christopher P	Mar 28, 2018, 11:30 AM
Student Count	1,247	Major/Minor Demographics and Student Rosters	1	College of Arts & Sciences	Combs, Michelle S	Apr 23, 2018, 5:35 PM
Course Cap Reached	1,158	Percent of Course Capacity Reached	2	College of Arts & Sciences	Combs, Michelle S	Jan 5, 2018, 1:49 PM
Daily Report	1,156	Daily GSAS Eligibility	1	Graduate School - Fiscal Office	Cruse, Mark D	Jun 21, 2017, 8:35 AM
Specializations Headcount - Students	1,072	Specializations Headcount Detail	2	Student Reports Detail	Albers, Shelby D	Mar 13, 2018, 12:06 PM
Section Cap Reached	1,065	Percent of Course Capacity Reached	1	College of Arts & Sciences	Combs, Michelle S	Jan 5, 2018, 1:49 PM
Institutional Retention and Graduation Rates	1,013	Institutional Retention Dashboard with Preliminary Data	2	Student Reports	Albers, Shelby D	Jan 12, 2018, 11:49 AM
2nd Fall Overall	970	Cohort Enrollment History	1	Student Reports	Albers, Shelby D	Dec 6, 2017, 4:22 PM
VOE without Salary	936	L16 Employment Verification	4	HRS Screens	Hiemstra, Heidi J	May 17, 2017, 4:47 PM

# Finding the Travel Expense Report

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

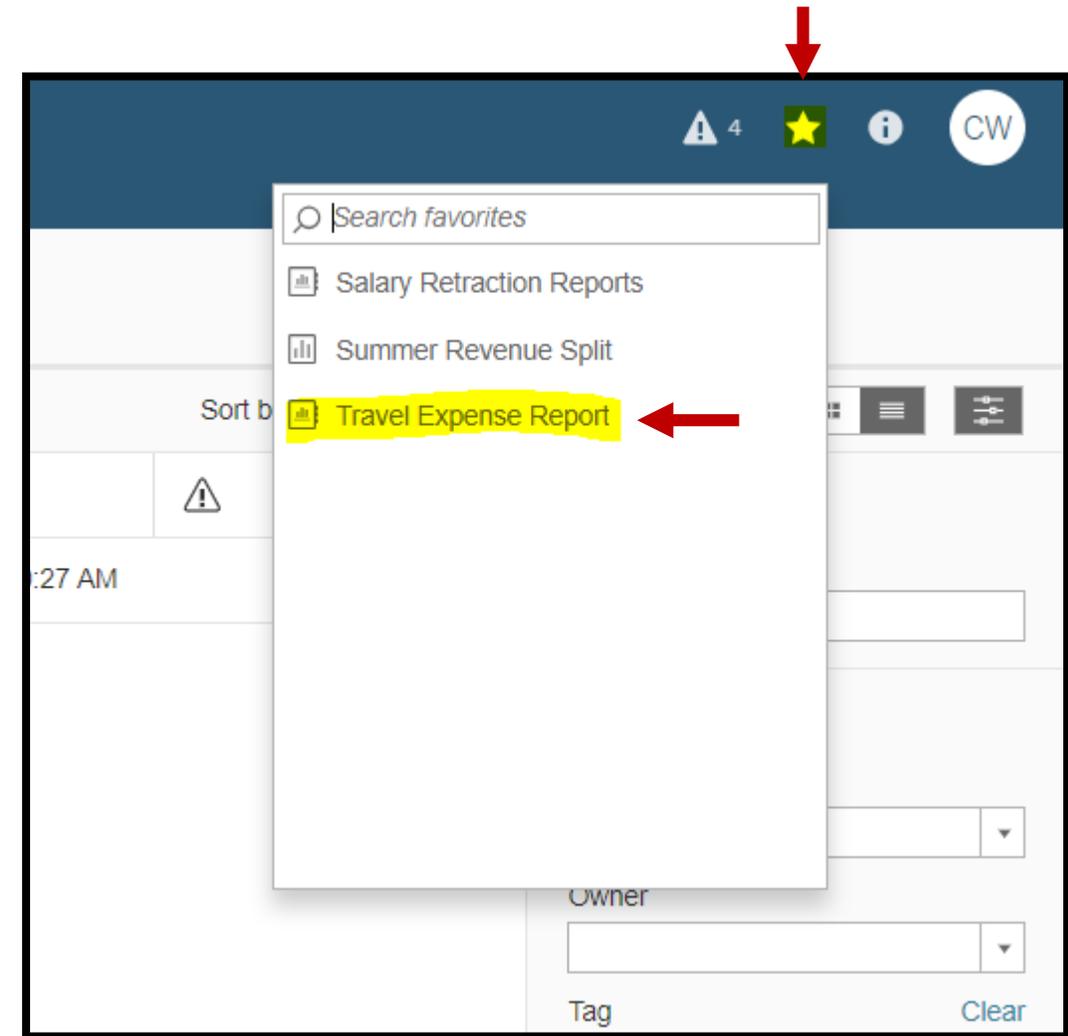
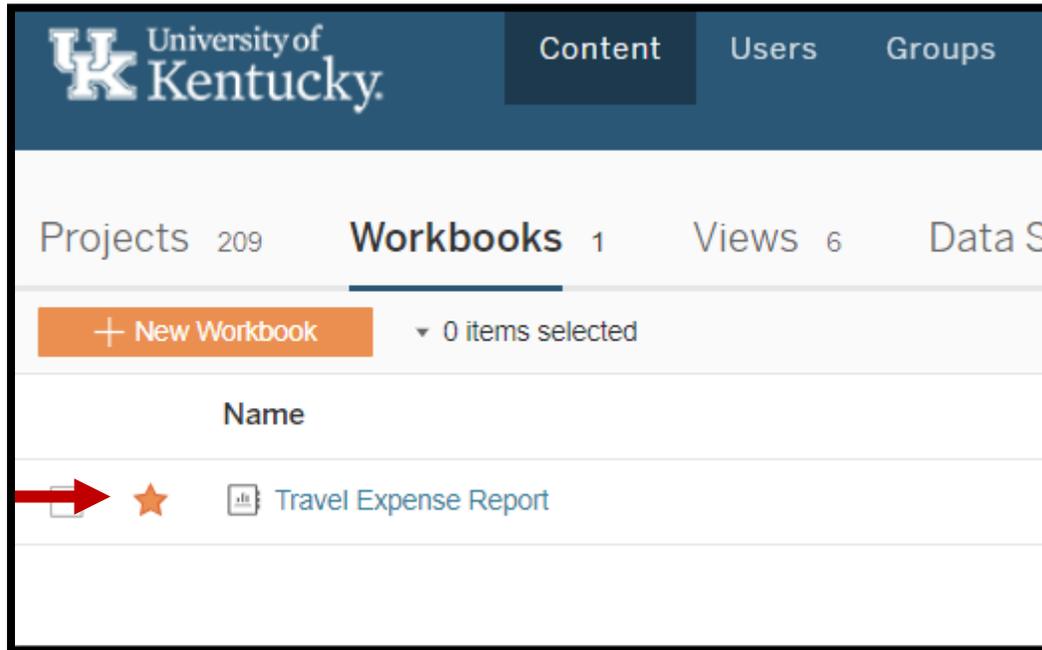


The screenshot displays the University of Kentucky system interface. The top navigation bar includes the University of Kentucky logo, a search icon, and user information (CW). The main content area shows a list of projects, with the 'Projects' tab highlighted. A search filter for 'Travel' is applied, and a red arrow points to the search input field. The table below shows the results of the search.

Name	Projects	Workbooks	Views	Data Sources
Travel	0	1	6	0

# 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



2

# Travel Expense Report

# Travel Expense Reports

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

# Navigating the Report

The screenshot shows the University of Kentucky Travel Expense Report interface. The top navigation bar includes 'Content', 'Users', 'Groups', 'Schedules', 'Tasks', and 'Status'. The breadcrumb trail is 'Home > Travel > Travel Expense Report > Start Page - HR'. The main content area displays 'Total Trips (by HR)\*' as 55,602. Below this are several filter sections: 'HR Department Prefix', 'Personnel Number', 'Trip Begin Date' (with a date range from 12/16/2015 to 2/1/2217), 'GL Account', 'HR Department Code', 'Traveler Name', 'Trip End Date' (with a date range from 12/7/2015 to 5/20/2217), 'Country Code', 'HR Department', 'Trip Number', and 'Earliest Posting Date' (with a date range from 8/22/2016 to 10/26/2018). A 'Trip Status' dropdown menu is open, showing options: (All), CANCELED, COMPLETED (checked), DRAFT, OPEN, and POSTED (checked). The 'Apply' button is visible at the bottom of the dropdown. Four numbered callouts are present: 1 points to the 'Start Page - HR' tab; 2 points to the 'Trip Status' dropdown; 3 points to the 'Trip End Date' slider; and 4 points to the 'Start Page - FI' tab.

- 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

AIRFARE

BAGGAGE FEES

GROUND TRANSPORTATION

LODGING

PARKING & TOLLS

CAR RENTAL

GASOLINE (Rental Car Only)

INT'L LODGING > PER DIEM

OTHER EXPENSES

REGISTRATION FEES

SPECIAL MEALS/REQUIRED

BANQUET

SUBTOTAL RECEIPTS

## FLAT RATES

MILEAGE

MEALS PER DIEM

SUBTOTAL MEALS PER DIEM &  
MILEAGE

## OTHER AMOUNTS

PAY ONLY REDUCTION

PAY ONLY AMOUNT

PAYMENT AMOUNT

REIMBURSEMENT AMOUNT

TOTAL TRIP COST

# Reimbursed Cost Assignment

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

Home > Travel > Travel Expense Report > FI Reimbursed Cost Assignment ☆ 1

← Undo → Redo | ← Revert | Refresh | Pause | View: Original | Alert | Subscribe | Edit | Share

Quick Reference | Start Page - HR | HR Total Travel Expense | HR Reimbursed Cost Assignm... | Start Page - FI | FI Reimbursed Cost Assignment

Total Trips (by FI) **45**

Travel - Reimbursed Cost Assignment (FI)

FI Department Code	FI Department	Personnel Number	Traveler Name	HR Department	HR Department	Trip Number	Trip Status	GL Account	FI Document Number	Cost Sequence Number	Cost Center	Wbs Element	Grant Number	Internal Order	Fund	Funds Center	Amount
				81030	CAFE Business Center	0000058546	POSTED	0000530019	1901563024	01	1012503050	00000000	GMNR		0011260200	1012503050	\$197.30
					Total												\$197.30
				81030	Ag Business Center	0000000655	POSTED	0000530019	1901345457	01	1012583060	00000000	GMNR		0011260300	1012583060	\$1,164.30
					Total												\$1,164.30
						0000007067	POSTED	0000530019	1901377224	01	1012583060	00000000	GMNR		0011260300	1012583060	\$58.86
					Total												\$58.86
						0000010045	POSTED	0000530019	1901389148	01	1012583060	00000000	GMNR		0011260300	1012583060	\$95.24
					Total												\$95.24
						0000010047	POSTED	0000530019	1901389149	01	1012583060	00000000	GMNR		0011260300	1012583060	\$89.88
					Total												\$89.88
						0000022661	POSTED	0000530019	1901445286	01	1012583060	00000000	GMNR		0011260300	1012583060	\$169.63
					Total												\$169.63
						0000025233	POSTED	0000530019	1901449638	01	1012583060	00000000	GMNR		0011260300	1012583060	\$207.58
					Total												\$207.58
						0000026791	POSTED	0000530019	1901452058	01	1012583060	00000000	GMNR		0011260300	1012583060	\$121.10
					Total												\$121.10
						0000037371	POSTED	0000530019	1901489580	01	1012583060	00000000	GMNR		0011260300	1012583060	\$744.47
					Total												\$744.47
						0000039455	POSTED	0000530019	1901498398	01	1012583060	00000000	GMNR		0011260300	1012583060	\$497.04
					Total												\$497.04
					CAFE Business Center	0000043340	POSTED	0000530019	1901509633	01	1012583060	00000000	GMNR		0011260300	1012583060	\$383.68
					Total												\$383.68
						0000045189	POSTED	0000530019	1901524016	01	1012151360	00000000	GMNR		0011020100	1012151360	\$751.10
										02	1012151370	00000000	GMNR		0011020100	1012151370	\$751.10
					Total												\$1,502.20

Cost Center: (All)

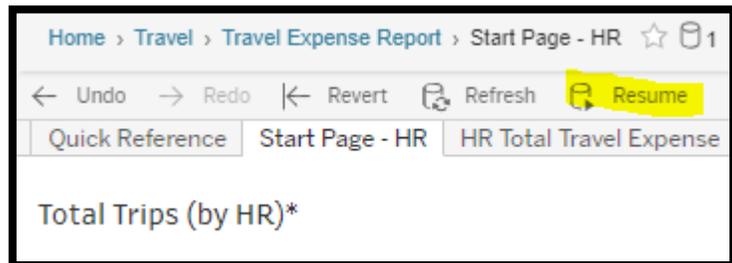
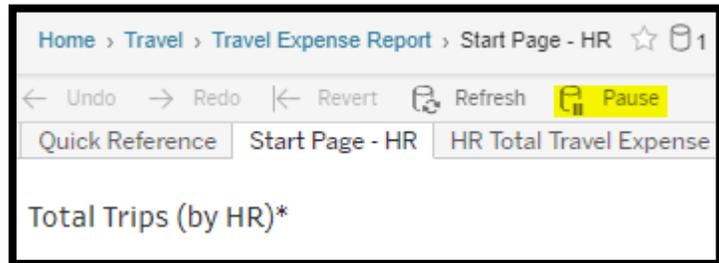
Wbs Element: (All)

Fund: (All)

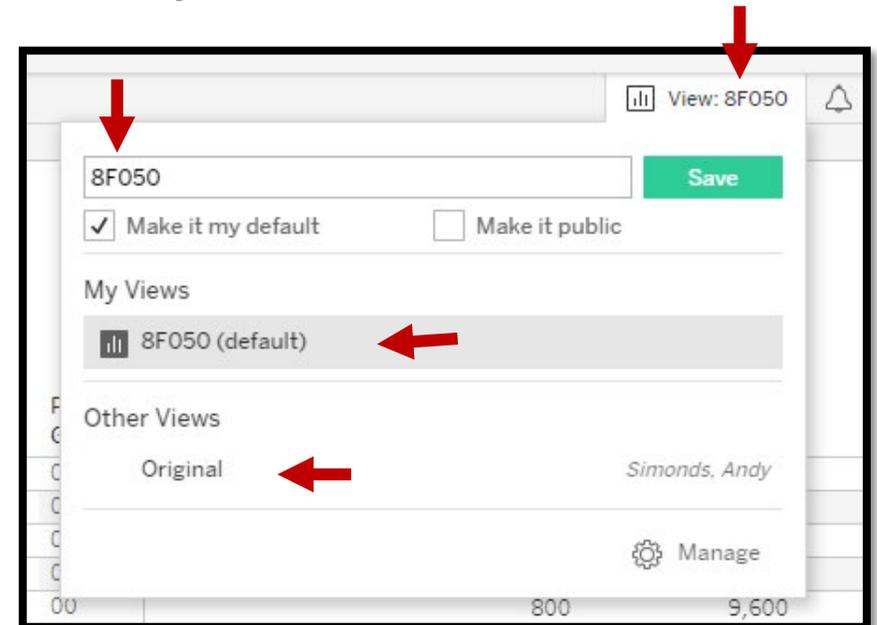
Internal Order: (All)

# 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

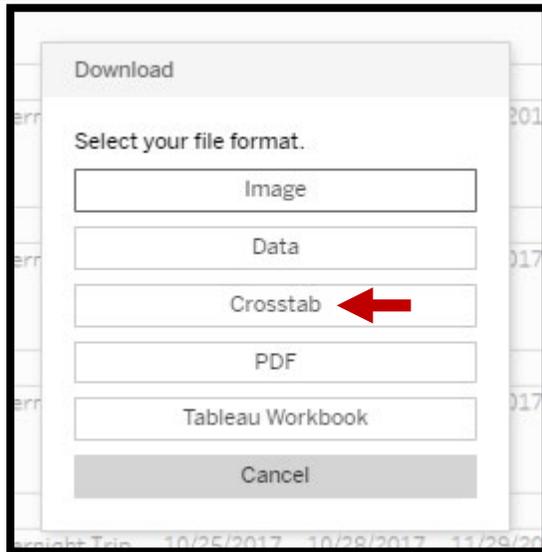


- Create a custom view
- Set your commonly used filter settings on the Start Page
- Go to View (top right)
- Enter a name and choose whether to make it your default



# Download to Excel

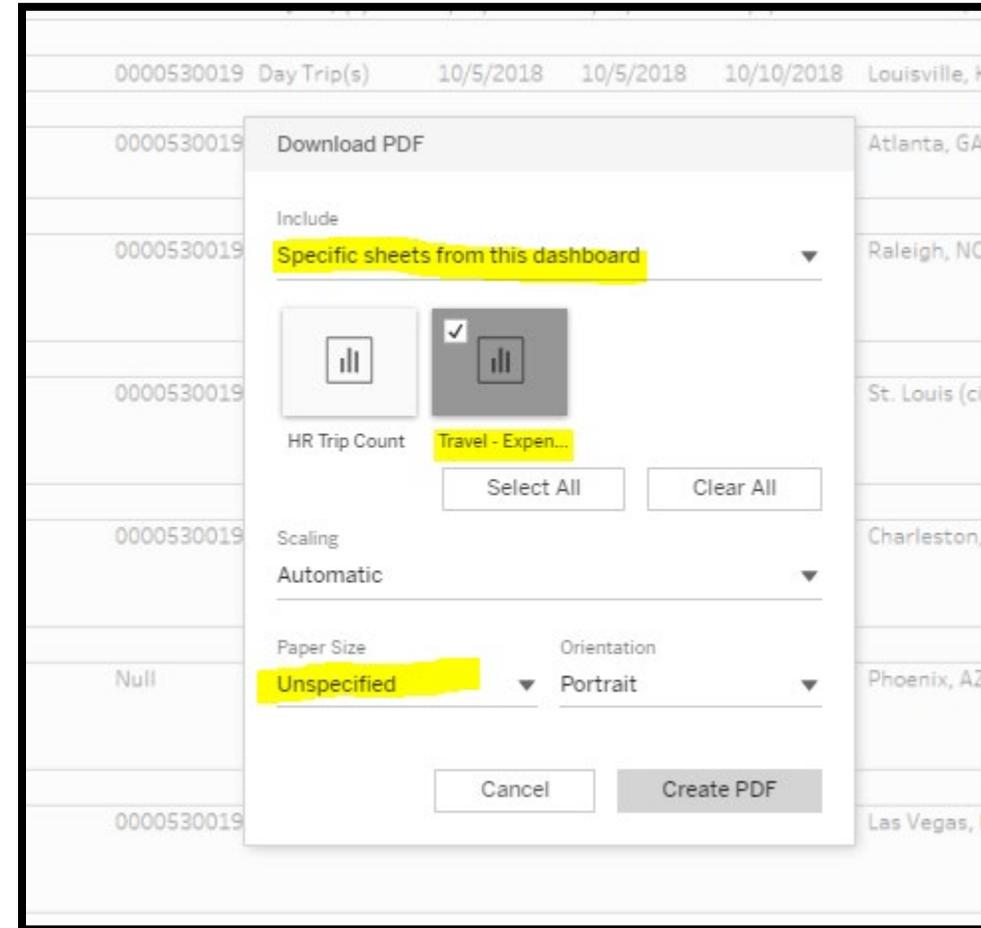
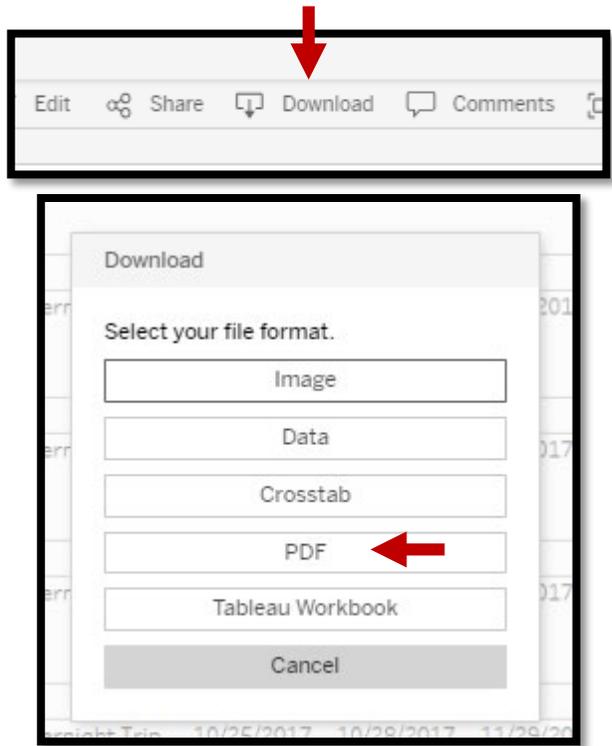
- Download > Crosstab. If Crosstab is grayed out, click inside the data table. Then go to Download and Crosstab should be an option
- Note that Subtotal rows are included. Filter them out if not needed.



	A	B	C	D	E	F	G
1	HR Department Code	HR Department	Personnel Number	Traveler Name	Trip Number	Trip Status	FI Document Number
2	3A000	Controller And Treasurer	11087	Susan I Krauss	23	POSTED	1901333426
3	3A000	Controller And Treasurer	11087	Susan I Krauss	23	Total	Total
4	3A000	Controller And Treasurer	11087	Susan I Krauss	349	POSTED	1901337293
5	3A000	Controller And Treasurer	11087	Susan I Krauss	349	POSTED	1901337293
6	3A000	Controller And Treasurer	11087	Susan I Krauss	349	Total	Total
7	3A000	Controller And Treasurer	11087	Susan I Krauss	644	POSTED	1901346891
8	3A000	Controller And Treasurer	11087	Susan I Krauss	644	POSTED	1901346891
9	3A000	Controller And Treasurer	11087	Susan I Krauss	644	POSTED	1901346891
10	3A000	Controller And Treasurer	11087	Susan I Krauss	644	Total	Total
11	3A000	Controller And Treasurer	11087	Susan I Krauss	7467	POSTED	1901387930
12	3A000	Controller And Treasurer	11087	Susan I Krauss	7467	POSTED	1901387930
13	3A000	Controller And Treasurer	11087	Susan I Krauss	7467	POSTED	1901387930
14	3A000	Controller And Treasurer	11087	Susan I Krauss	7467	Total	Total
15	3A000	Controller And Treasurer	20002204	Mary M Fister-Tucker	7126	POSTED	1901377303
16	3A000	Controller And Treasurer	20002204	Mary M Fister-Tucker	7126	POSTED	1901377303
17	3A000	Controller And Treasurer	20002204	Mary M Fister-Tucker	7126	POSTED	1901377303

# 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](mailto:analytics@uky.edu))

- **About TRIP Reimbursement**

- Contact Travel Services at 859-257-5437 or email [trip@uky.edu](mailto:trip@uky.edu)