

## Tableau Reporting

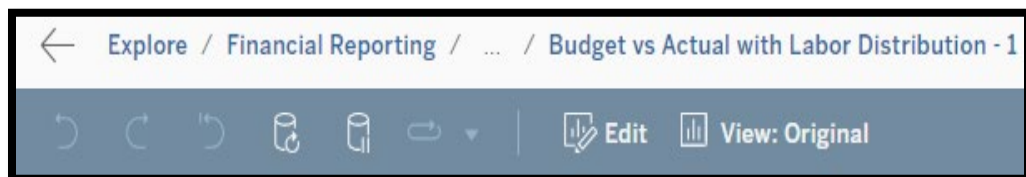
Table of Contents
I. Things to know – <a href="#">pg. 1</a>
II. Running Reports – <a href="#">pg. 2</a>
III. How to Open a View – <a href="#">pg. 3</a>
IV. HR Labor Distribution Reports – <a href="#">pg. 4</a>
V. Other Recommended Reports/Folders – <a href="#">pg. 6</a>

Access to Tableau Projects must be granted based on your position needs. Please contact the M-G CAFE Business Center @ [cafeanalysts@uky.edu](mailto:cafeanalysts@uky.edu) if you need to request access.

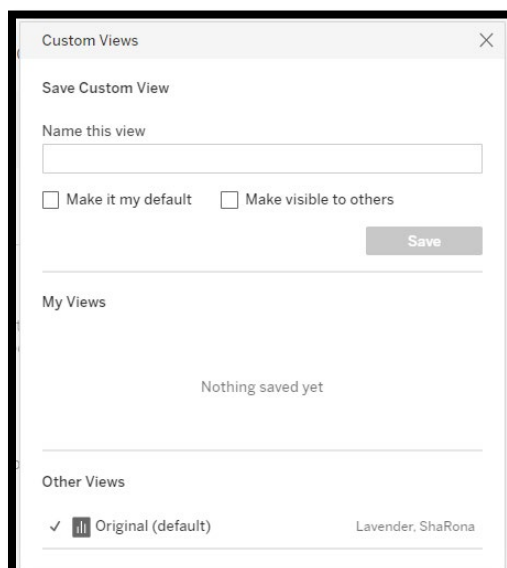
- Use the web address below from your Chrome or Firefox Browser and login using your UK login credentials  
<https://analytics.uky.edu/#/home>
- Be sure to join the Tableau user group in Teams

### Things to know:

- Tableau data is updated nightly, this link will provide you with information regarding the last update <https://analytics.uky.edu/#/workbooks/11818>  
In the event an issue occurs with the nightly update the Analytics Team will provide information in the Tableau user group chat.
- You can save a folder or individual report as a favorite by clicking the star next to the report name. This will designate the report folder or view as a favorite and allow you to easily access the same report in the future.
- You can save a report view with the variables applicable to your department. This will save you time on generating future reports.
  - Select View: Original



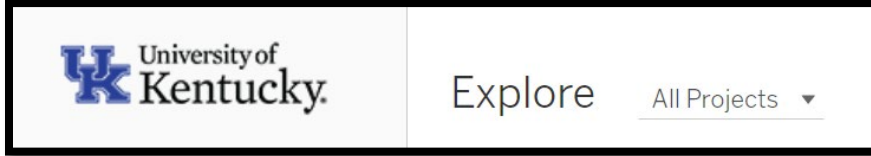
- Name your view and choose visibility.



## Running Reports

Select the **Explore** button in the lefthand menu panel.

- To see all available reports → Select all Projects



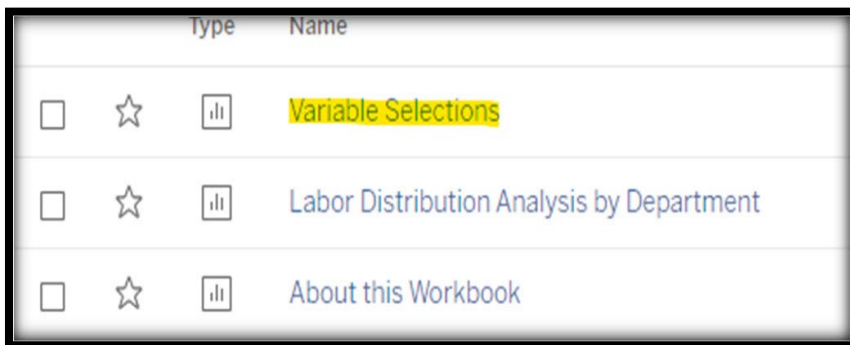
- Select Financial Reporting



- Select Report Folder → Report

- There are many different reports/folders available – select the appropriate report type based on your needs.
- Select **Variable selections**, then enter the appropriate department, cost object, fiscal period, etc.

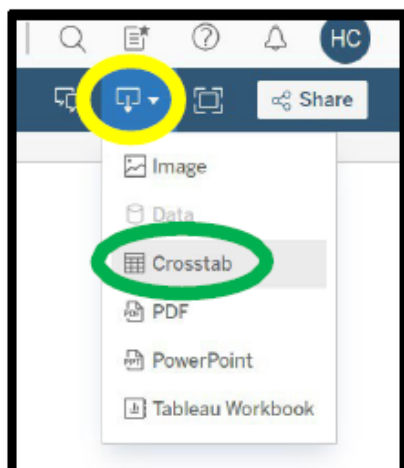
Note: Fiscal Periods are 001 = July, 002 = August, 003 = September, etc



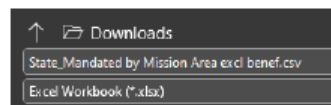
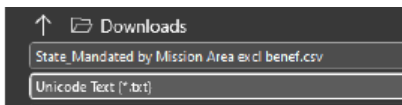
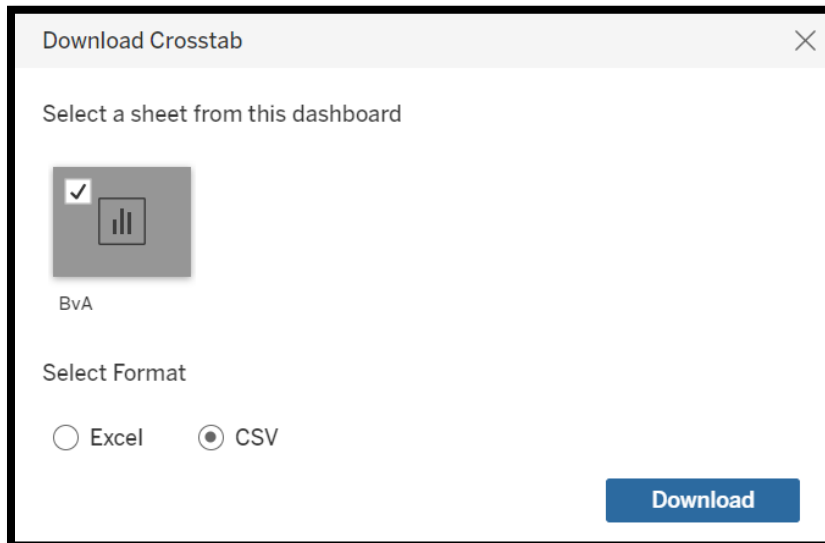
- Enter the applicable filters, such as department number/fund center and then click the **<Execute>** button.



- Select Download → Crosstab → Choose download format.

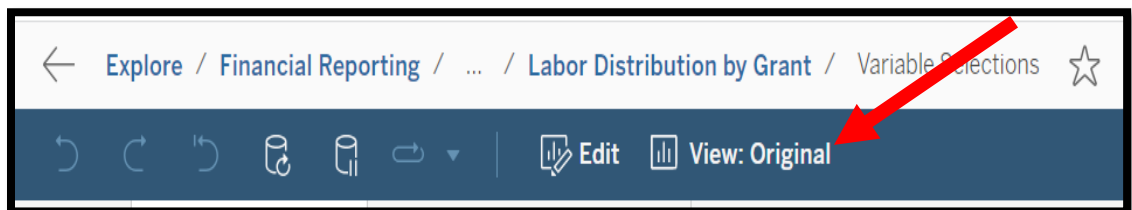


- It's recommended to download in CSV format. CSV will open as an excel file. CSV will open as an excel file. The default file type is Unicode Text When saving the file. **Be sure to change the file "Save as type" to *Excel workbook*.**

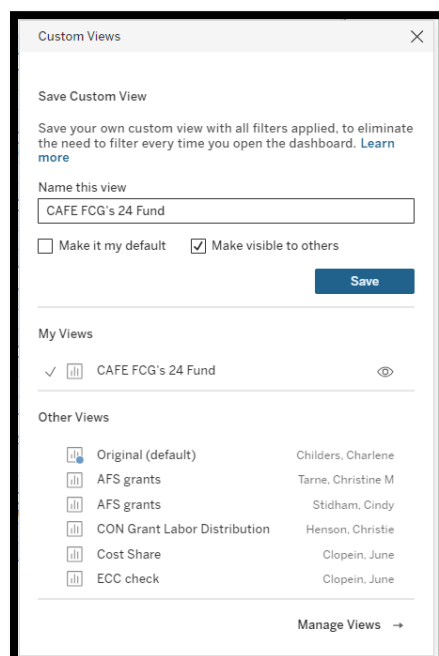


- **How to open a view**

- On the variable screen Select View Original

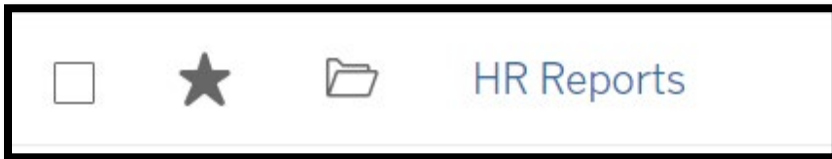


- In the custom views pop-up window, you will see a list of views available for use, including views you have created. Select the view to populate the saved variables. Be sure to select any additional filters based on your needs.



## HR Labor Distribution Reports

- It is important to note that labor distribution reports accessed through the Financial Reporting → HR Reports folder will not include adjustment transactions (Z4, biweekly accruals, etc) these reports are limited to payroll results only.
- **Select HR Reports → Labor Reports**



- There are many different reports available – select the appropriate report type based on account type or department.

### Labor Reports

Owner: Lavender, ShaRona

This folder provides access to view Financial Reports developed by IRADS. For access to view the

★ ⓘ ⋮

New ▾

Select All







			Type	Name
<input type="checkbox"/>	☆			Labor Distribution Analysis
<input type="checkbox"/>	☆			Labor Distribution by Department
<input type="checkbox"/>	☆			Labor Distribution by Funds Center
<input type="checkbox"/>	☆			Labor Distribution by Grant
<input type="checkbox"/>	☆			Labor Distribution by Grant with Cost Share and Pay Category
<input type="checkbox"/>	☆			Labor Distribution by Organizational unit
<input type="checkbox"/>	☆			Labor Distribution by Pay Period
<input type="checkbox"/>	☆			Labor Distribution by WBS element
<input type="checkbox"/>	☆			Labor Distribution Fiscal YTD detail analysis by Department
<input type="checkbox"/>	☆			Labor Distribution PTD detail analysis by Department
<input type="checkbox"/>	☆			Z4_CREATOR

## Federal Capacity Labor Reports View excluding Benefits

- CAFE FCG's 24 Fund

---





### Other Views

 Original (default)	Childers, Charlene
 AFS grants	Tarne, Christine M
 AFS grants	Stidham, Cindy
<input checked="" type="checkbox"/>  CAFE FCG's 24 Fund	Costello, Cristin
 Cost Share	Clopein, June
 ECC check	Clopein, June

## Other Recommended Reports/Folders





























### M-G CAFE - Department Business Officer Reports

Explore / M-G College of Agriculture, Food and Environment -... / M-G CAFE - Department Business Officer Reports

 **M-G CAFE - Department Business Officer Reports**   

Owner **Hardin, Jason J.**

**New** ▾ **Select All**

	Type	Name
<input type="checkbox"/>		 M-G CAFE All Funds Summary
<input type="checkbox"/>		 M-G CAFE BvA Excluding Benefits - State, Mandated, Federal Only
<input type="checkbox"/>		 M-G CAFE EFNEP Excluding Retirement
<input type="checkbox"/>		 M-G CAFE Encumbrance Detail
<input type="checkbox"/>		 M-G CAFE FCG Excluding Benefits
<input type="checkbox"/>		 M-G CAFE Fixed Price Residual inc benefits
<input type="checkbox"/>		 M-G CAFE HR Clearing including benefits
<input type="checkbox"/>		 M-G CAFE Income Supported including benefits
<input type="checkbox"/>		 M-G CAFE Reconciliation Reports for Cost Centers Only
<input type="checkbox"/>		 M-G CAFE Restricted including benefits
<input type="checkbox"/>		 M-G CAFE State/Mandated ex Bene by Mission Area
<input type="checkbox"/>		 M-G CAFE State/Mandated excluding benefits
<input type="checkbox"/>		 M-G CAFE UKRF (VPR Supported Bus Area 0201) including benefits
<input type="checkbox"/>		 SBA Expense Categories

All Grants Management Reports

Explore / Financial Reporting / FI Financial Accounting / Grants Management

**Grants Management** ★ ⓘ ...  
Owner: Lavender, ShaRona

This folder provides access to view Financial Reports developed by IRADS. For access to view the reports, please send an email to EAaccess@uky.edu. Access is approved by the super... [read more](#)

New ▾ Select All

Type	Name
Folder	Additional Views
Folder	Archive Reports
File	Grant Budget Item Detail
File	Grant Expenditures by award characteristics (KPI)
File	Grant Ledger - PI GL Account Detail
File	Grant Ledger - PI Sponsored Class Detail
File	Grant Ledger - PI Summary
File	Grant Ledger Report
File	Grant Ledger - PI Executive Summary
File	Grant Line Item Detail
File	Grant Management Reports Quick Links
File	Primary Grant and Their Related Grants

Grant Ledger Report

Explore / Financial Reporting / FI Financial Accounting / Grants Management / Grant Ledger Report

**Grant Ledger Report** ★ ⓘ ...  
Owner: Lavender, ShaRona Modified: Sep 8, 2023, 10:09 AM

7/18 – Updated current expense, zd docs and filters. 7/25/23 – Updated cumulative expenses 8/2/23

Edit Workbook

Views 2 Data Sources 1 Connected Metrics 0 Custom Views 18 Subsc...

Select All

Type	Name
File	Variable Screen Grant Ledger Report
File	Grant Ledger Report

Grant Line Item Detail

Explore / Financial Reporting / FI Financial Accounting / Grants Management / Grant Line Item Detail

**Grant Line Item Detail** ★ ⓘ ...

Owner **Childers, Charlene** Modified **Jul 19, 2023, 2:13 PM**

3/25/22 – Added "Fund" as a variable and to report body 4/8/22-Added Doc Type Description, Fiscal

Edit Workbook

**Views 3** Data Sources 1 Connected Metrics 0 Custom Views 4 Subscri

Select All

	Type	Name
<input type="checkbox"/> ☆		Variable Sheet
<input type="checkbox"/> ☆		Grant Line Item Detail
<input type="checkbox"/> ☆		About this workbook

Grant Ledger – PI Summary

Explore / Financial Reporting / FI Financial Accounting / Grants Management / Grant Ledger - PI Summary

**Grant Ledger - PI Summary** ☆ ⓘ ...

Owner **Lavender, ShaRona** Modified **Aug 31, 2023, 12:43 PM**

7/18/2023 – Added current expenses, zd documents and changed filters 7/25/23 – Updated cumulative ex

Edit Workbook

**Views 2** Data Sources 1 Connected Metrics 0 Custom Views 29 Subscripti

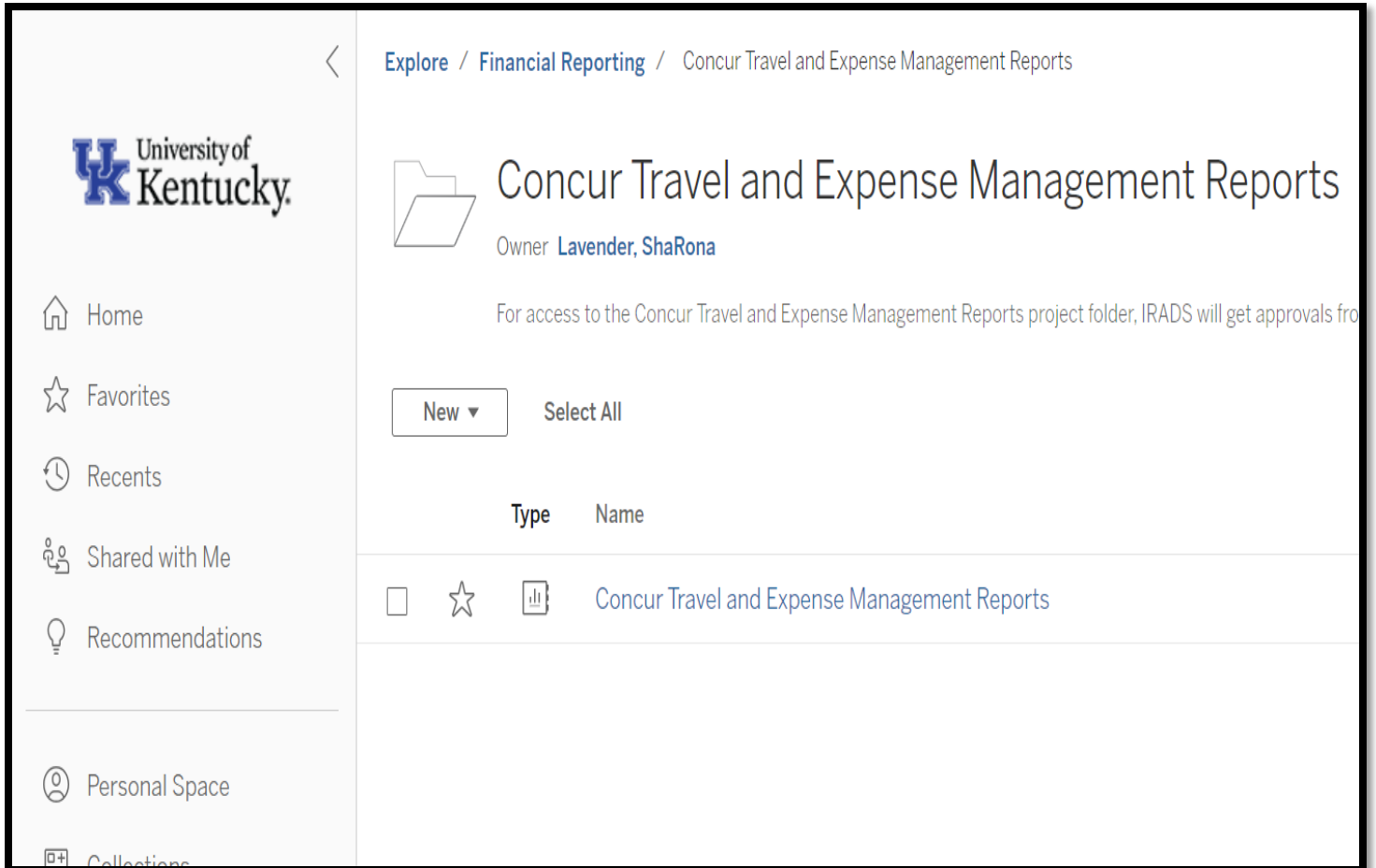
Select All

	Type	Name
<input type="checkbox"/> ☆		Variable Screen Grant Ledger - PI Summary
<input type="checkbox"/> ☆		Grant Ledger - PI Summary





## [Concur Travel and Expense Management Reports](#)

### [Report Quick Reference Guide](#)



The screenshot displays a OneDrive interface. On the left is a navigation pane with the University of Kentucky logo and menu items: Home, Favorites, Recents, Shared with Me, Recommendations, Personal Space, and Collections. The main area shows a breadcrumb path: Explore / Financial Reporting / Concur Travel and Expense Management Reports. Below this is a folder icon and the title 'Concur Travel and Expense Management Reports', with the owner listed as 'Lavender, ShaRona'. A note states: 'For access to the Concur Travel and Expense Management Reports project folder, IRADS will get approvals from'. Action buttons for 'New' and 'Select All' are visible. A table lists the folder with columns for 'Type' and 'Name'.

	Type	Name
<input type="checkbox"/>  		Concur Travel and Expense Management Reports