

## Tableau Reporting

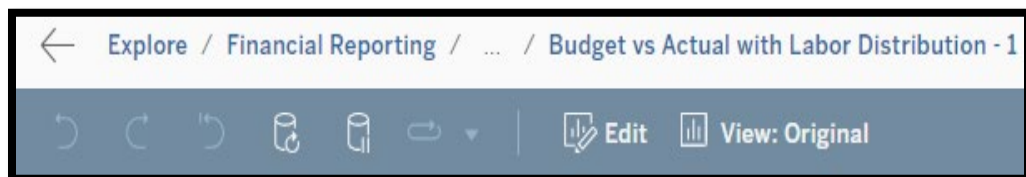
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Access to Tableau Projects must be granted based on your position needs. Please contact the M-G CAFE Business Center @ [cafeanalysts@uky.edu](mailto:cafeanalysts@uky.edu) if you need to request access.

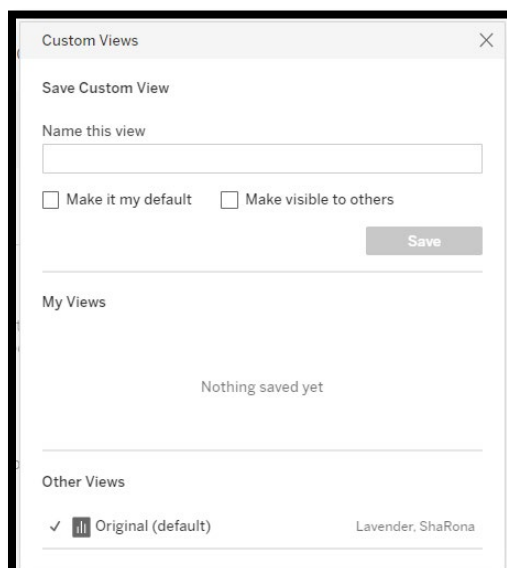
- Use the web address below from your Chrome or Firefox Browser and login using your UK login credentials  
<https://analytics.uky.edu/#/home>
- Be sure to join the Tableau user group in Teams

### 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



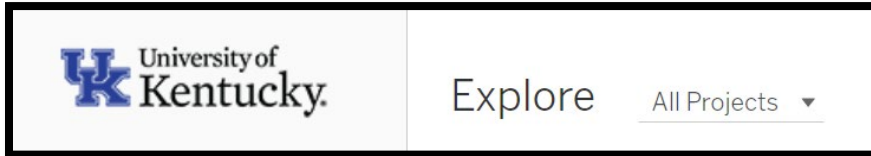
- Name your view and choose visibility.



## Running Reports

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

- To see all available reports → Select all Projects



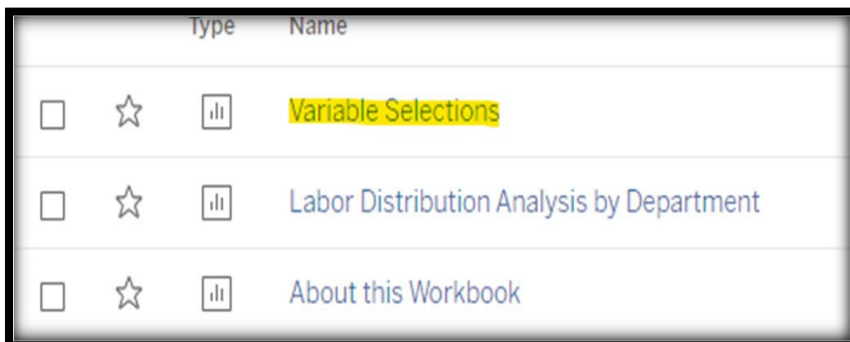
- Select Financial Reporting



- 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.

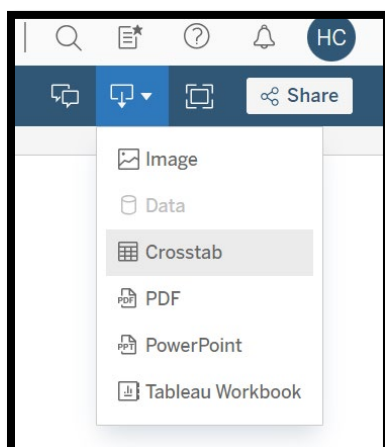
Note: Fiscal Periods are 001 = July, 002 = August, 003 = September, etc



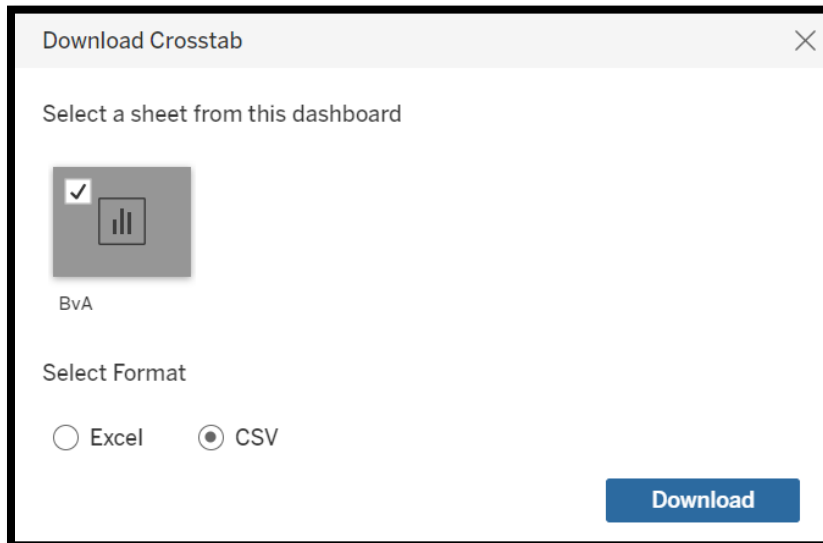
- Enter the applicable filters, such as department number/fund center and then click the **<Execute>** button.



- Select Download → Crosstab → Choose download format.

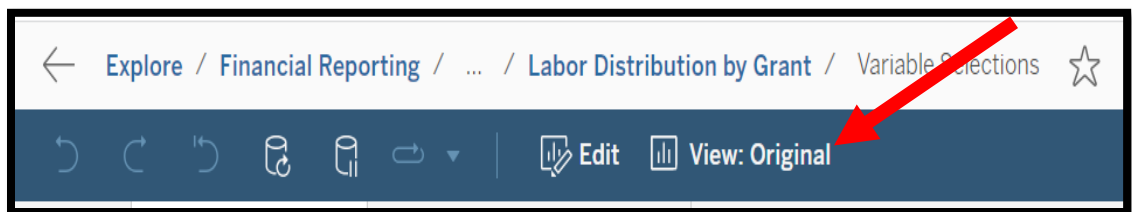


- It's recommended to download in CSV format. CSV will open as an excel file.

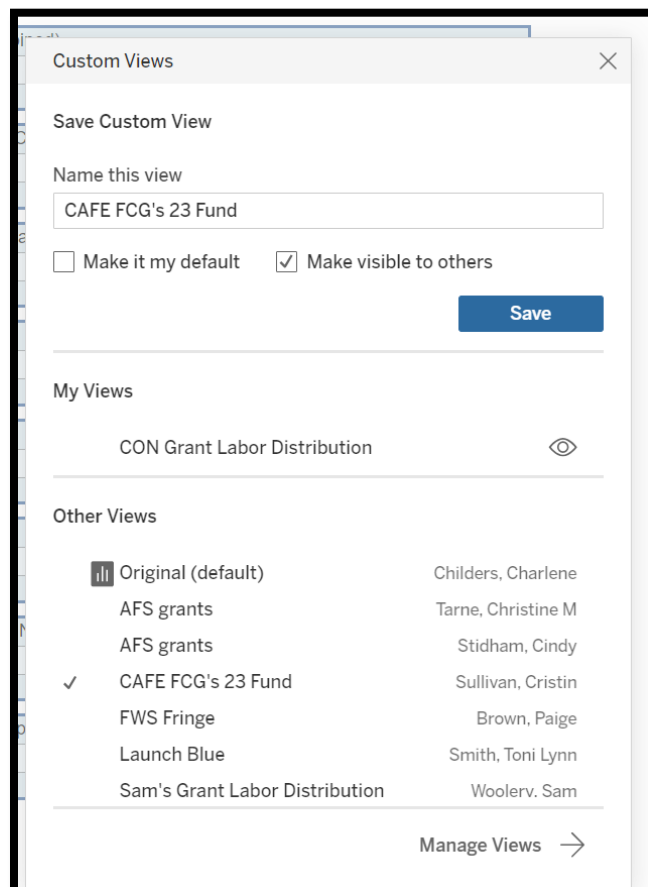


- **How to open a view**

- On the variable screen Select View Original

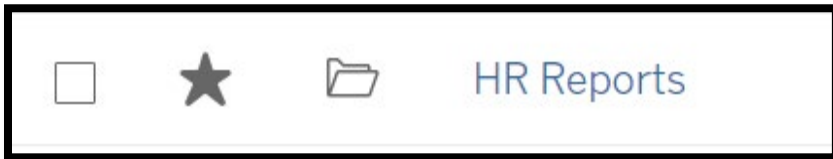


- In the custom views pop-up window, you will see a list of views available for use, including views you have created. Select the view to populate the saved variables. Be sure to select any additional filters based on your needs.



## 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**



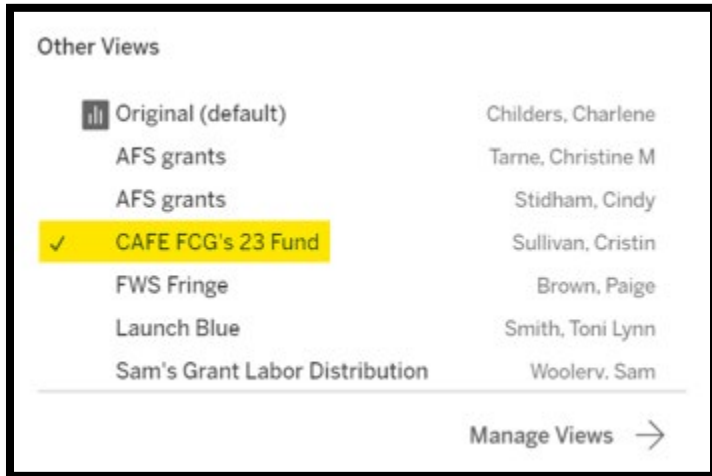
- There are many different reports available – select the appropriate report type based on account type or department.

A screenshot of a folder named 'Labor Reports'. The folder owner is 'Lavender, ShaRona'. A description states: 'This folder provides access to view Financial Reports developed by IRADS. For access to view the...'. Below the description are buttons for 'New' and 'Select All'. A table lists various report types and names.

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 23 Fund



[https://analytics.uky.edu/#/views/  
LaborDistributionbyGrant\\_16388029213310/  
VariableSelections/3c46e3ad-f08e-4526-8bc9-ef513e7f629e/  
CAFEFCGs23Fund?:iid=1](https://analytics.uky.edu/#/views/LaborDistributionbyGrant_16388029213310/VariableSelections/3c46e3ad-f08e-4526-8bc9-ef513e7f629e/CAFEFCGs23Fund?:iid=1)

## Other Recommended Reports/Folders

### Budget vs Actual with Labor Distribution – 1

### Budget vs Actual with Labor Distribution report descriptions and quick links

The screenshot shows a web interface for a University of Kentucky analytics workbook. The breadcrumb trail is: Explore / Financial Reporting / HR Reports / Budget vs Actual Reports / Budget vs Actual with Labor Distribution - 1. The workbook title is "Budget vs Actual with Labor Distribution - 1" with a star icon and a refresh icon. The owner is Lavender, ShaRona, and it was modified on Mar 3, 2023, 10:14 AM. A description notes updates for fiscal years 08/16/2021 and 08/20/2021. There is an "Edit Workbook" button. Below the title, it shows "Views 14", "Data Sources 2", "Connected Metrics 0", "Custom Views 0", and "Subscriptions 0". A "Select All" button is present above a table of reports.

Type	Name
<input type="checkbox"/> <input type="checkbox"/>	Variable_Screen
<input type="checkbox"/> <input type="checkbox"/>	Budget vs Actual
<input type="checkbox"/> <input type="checkbox"/>	Detail
<input type="checkbox"/> <input type="checkbox"/>	Encumbrance Detail
<input type="checkbox"/> <input type="checkbox"/>	Labor Distribution Details
<input type="checkbox"/> <input type="checkbox"/>	Budget Entry Doc Details
<input type="checkbox"/> <input type="checkbox"/>	Actual Details
<input type="checkbox"/> <input type="checkbox"/>	Actual YTD detail with vendor
<input type="checkbox"/> <input type="checkbox"/>	Actual by Period detail with vendor
<input type="checkbox"/> <input type="checkbox"/>	Actual - Period Breakout
<input type="checkbox"/> <input type="checkbox"/>	Labor distribution detail analysis by Department
<input type="checkbox"/> <input type="checkbox"/>	Labor distribution analysis by Department
<input type="checkbox"/> <input type="checkbox"/>	Actual Detail with Period Breakout
<input type="checkbox"/> <input type="checkbox"/>	About this Workbook

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
<input type="checkbox"/> ☆	Additional Views
<input type="checkbox"/> ☆	Archive Reports
<input type="checkbox"/> ★	Grant Budget Item Detail
<input type="checkbox"/> ☆	Grant Expenditures by award characteristics (KPI)
<input type="checkbox"/> ☆	Grant Ledger - PI GL Account Detail
<input type="checkbox"/> ★	Grant Ledger - PI Sponsored Class Detail
<input type="checkbox"/> ★	Grant Ledger - PI Summary
<input type="checkbox"/> ★	Grant Ledger Report
<input type="checkbox"/> ☆	Grant Ledger- PI Executive Summary
<input type="checkbox"/> ★	Grant Line Item Detail
<input type="checkbox"/> ☆	Grant Management Reports Quick Links
<input type="checkbox"/> ☆	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
<input type="checkbox"/> ☆	Variable Screen Grant Ledger Report
<input type="checkbox"/> ☆	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 Subscri

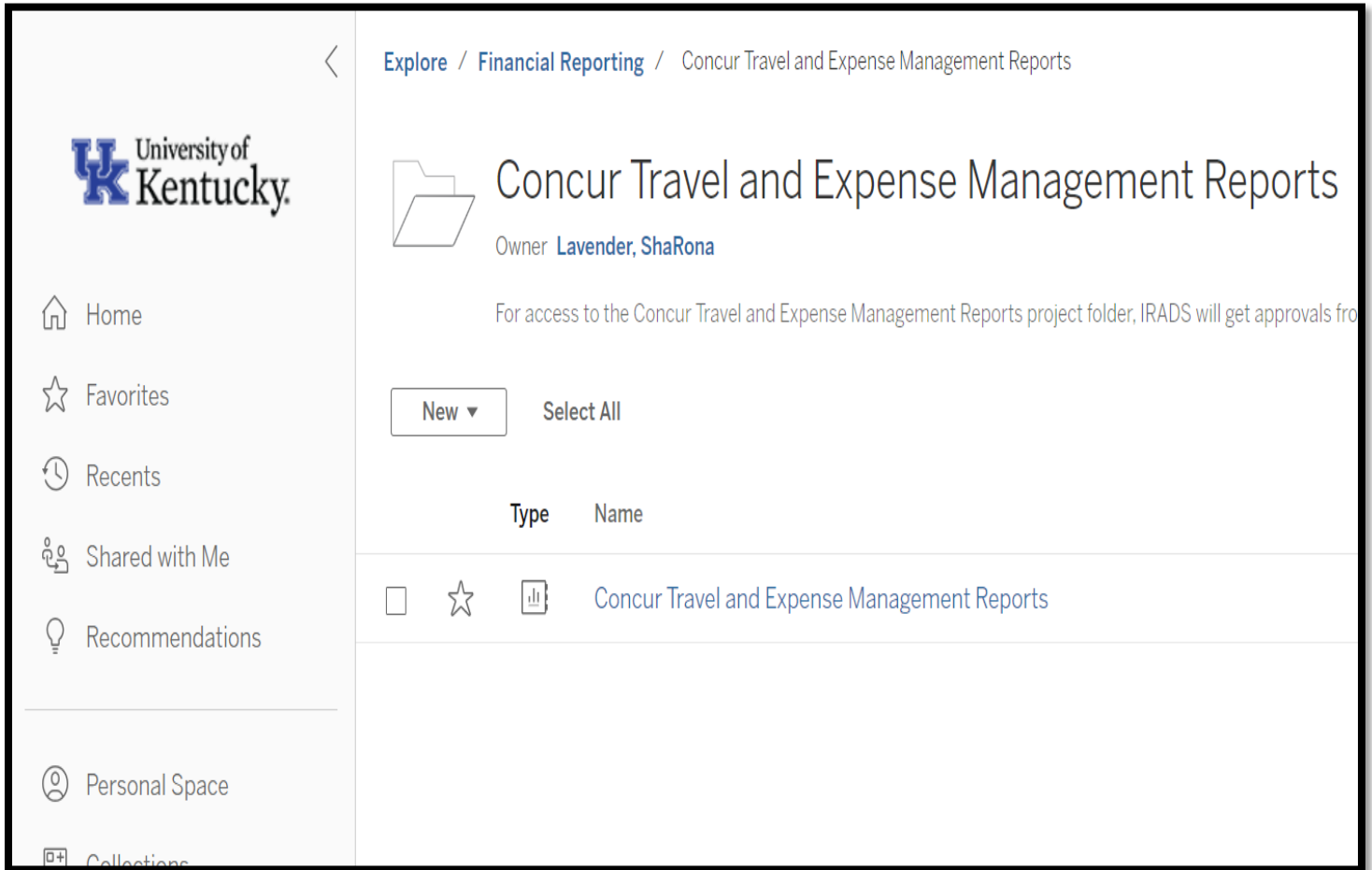
Select All

	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 shows a OneDrive interface. On the left is a navigation pane with the University of Kentucky logo and options: 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 'Lavender, ShaRona'. A note states: 'For access to the Concur Travel and Expense Management Reports project folder, IRADS will get approvals from'. Below the note are buttons for 'New' (with a dropdown arrow) and 'Select All'. A table lists the folder:

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