Martin-Gatton College of Agriculture, Food and Environment | **Business Center**

Tableau Reporting

Access to Tableau Projects must be granted based on your position needs. Please contact the M-G CAFE Business Center @ 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.
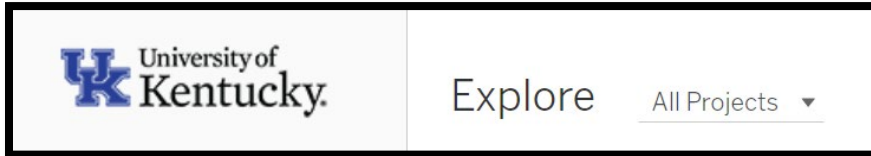 - Select View: Original
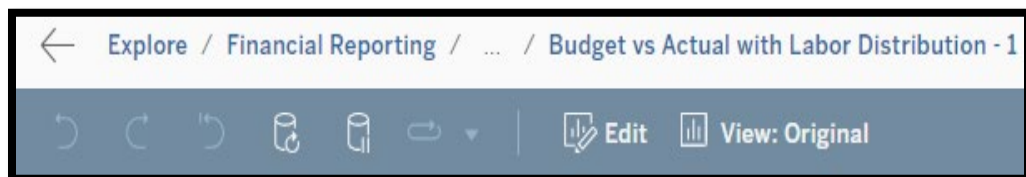
  - Name your view and choose visibility.
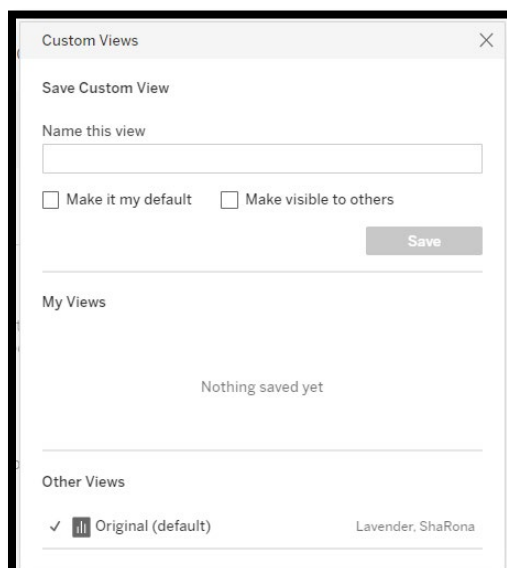
Running Reports

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.
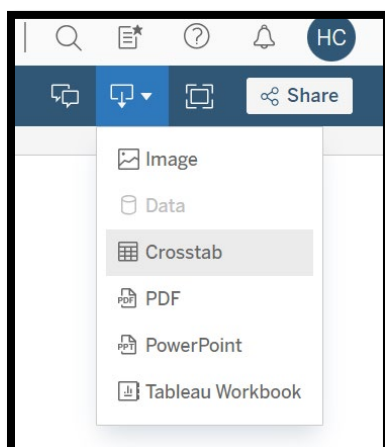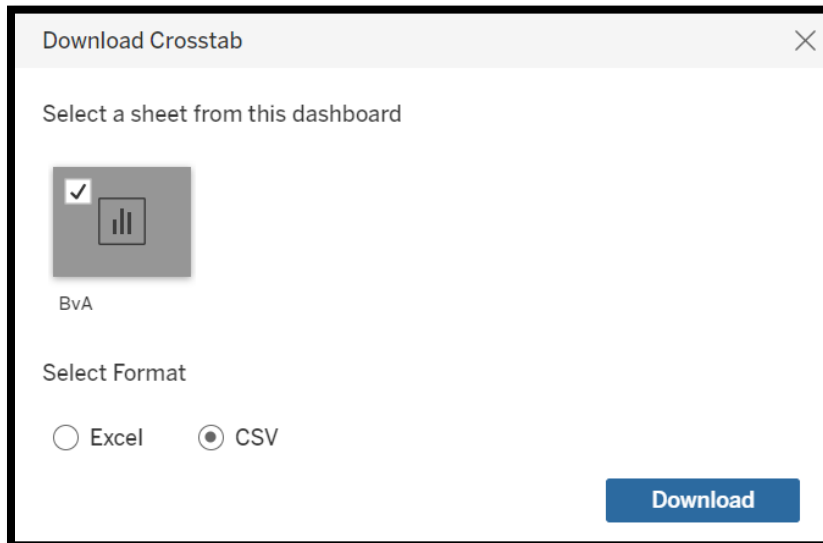   Note: Fiscal Periods are 001 = July, 002 = August, 003 = September, etc
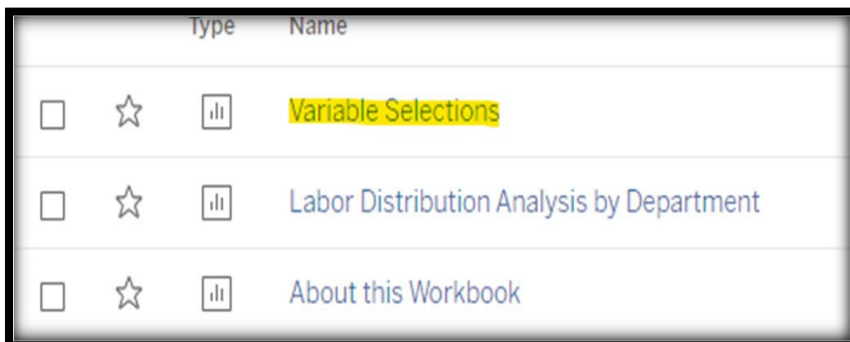
    - Enter the applicable filters, such as department number/fund center and then click the **<Execute>** button.

    - Select Download → Crosstab → Choose download format.

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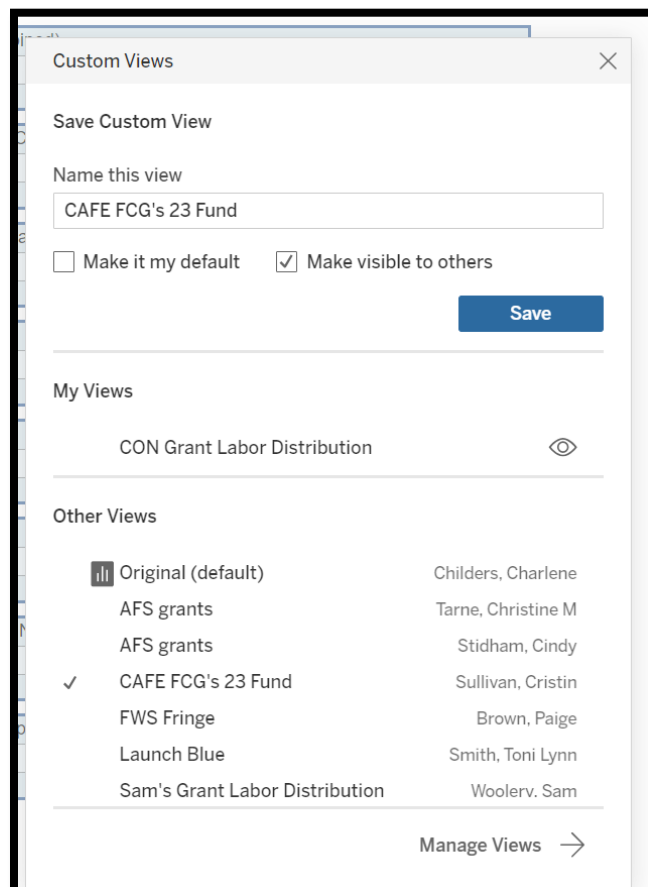

- **How to open a view**
   - On the variable screen Select View Original
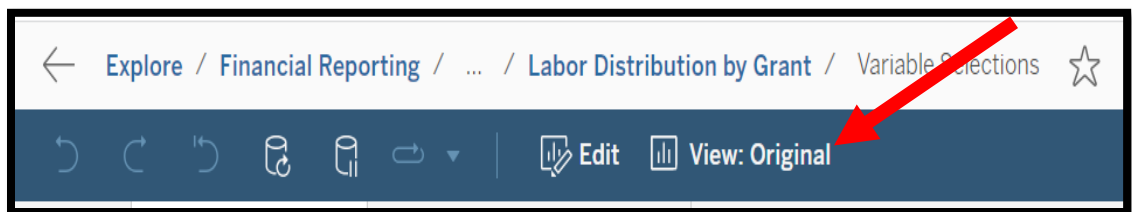
    - In the custom views pop-up window, you will see a list of views available for use, including views you have created. Select the view to populate the saved variables. Be sure to select any additional filters based on your needs.

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**

☐ ★ 🗁 HR Reports
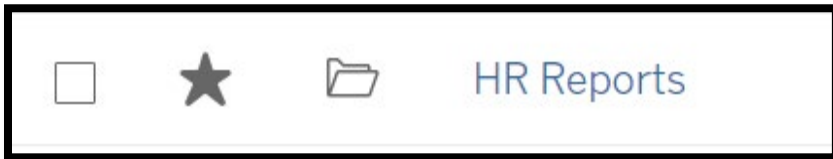
☐ ★ 🗁 Labor Reports

- 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
☐	☆	📊	Labor Distribution Analysis
☐	☆	📊	Labor Distribution by Department
☐	☆	📊	Labor Distribution by Funds Center
☐	☆	📊	Labor Distribution by Grant
☐	☆	📊	Labor Distribution by Grant with Cost Share and Pay Category
☐	☆	📊	Labor Distribution by Organizational unit
☐	☆	📊	Labor Distribution by Pay Period
☐	☆	📊	Labor Distribution by WBS element
☐	☆	📊	Labor Distribution Fiscal YTD detail analysis by Department
☐	☆	📊	Labor Distribution PTD detail analysis by Department
☐	☆	📊	Z4_CREATOR

Federal Capacity Labor Reports View excluding Benefits

- CAFE FCG's 23 Fund
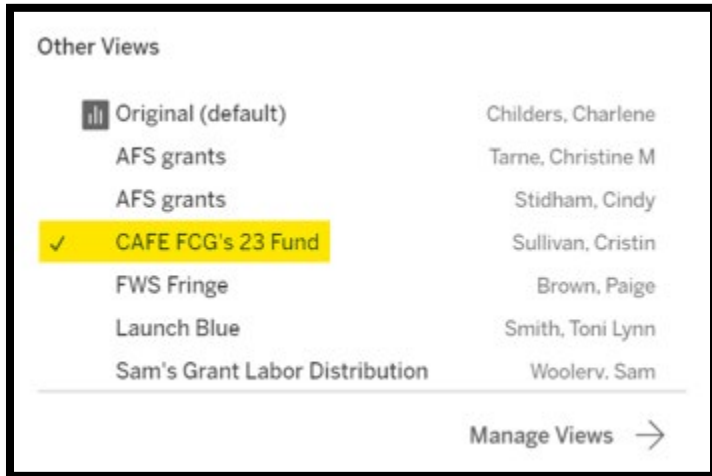
https://analytics.uky.edu/#/views/
LaborDistributionbyGrant_16388029213310/
VariableSelections/3c46e3ad-f08e-4526-8bc9-ef513e7f629e/
CAFEFCGs23Fund?:iid=1

Other Recommended Reports/Folders

[Budget vs Actual with Labor Distribution – 1](#)

[Budget vs Actual with Labor Distribution report descriptions and quick links](#)

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All Grants Management Reports

Grant Ledger Report

![UK Martin-Gatton College of Agriculture, Food and Environment | Business Center](logo)

Grant Line Item Detail

Grant Ledger – PI Summary

![Martin-Gatton College of Agriculture, Food and Environment | Business Center](logo)

[Concur Travel and Expense Management Reports](link)

[Report Quick Reference Guide](link)