

# CAFE ADMINISTRATIVE USERS' GROUP MEETING

November 10, 2020  
9:00 a.m. – 11:00 a.m.

Via Zoom

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## Agenda Items – Follow-Up Notes

**See Attached Handouts for More Details on All Topics**

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### 1. HR & Payroll

- a. Staff Performance Evaluations
- b. Upcoming Lunch & Learn Series
  - i. Teams Advanced Collaboration – 11/12/20
  - ii. Avoiding Bias in Evaluation Process (for supervisors) – 12/9/20
- c. Retirement Planning Sessions
- d. Flu Season and Free Vaccines
- e. Mentor Program Expansion – all new hires automatically receive an invite to this program
- f. Holidays / Emergency Closing Info
- g. W2s / End of Calendar Year Payroll Coverage
- h. ECRT/Payroll Deadlines
- i. Video Tutorials
- j. Post Doc Scholar Resources Page
- k. Remote I-9 Scheduling
- l. Part-Time Instructor SAP Entry / New QRG
- m. Email Access for Exiting Employees / MyDocs Portal
- n. New Hire Mask / T-Shirt Distribution
- o. Service Awards
- p. Circle of Love
- q. New Resource – QRG for Creating and Using SAP Variants

### 2. Procurement & Travel

- a. CONCUR Expense Types (GLs) – for additional G/L's that are being requested, see the attached list.
- b. Procard Voucher – receipts that are attached to pro card expenses should reflect a zero balance and should include all details relating to the expense.
- c. CONCUR Edit Deadlines
- d. CONCUR – Tableau Reports
- e. CONCUR Resources – on CAFE Business Center web site; link is in the attached handout.

### 3. Research & Grants

- a. SME – Grants Training
- b. FFY '20 Closing
- c. SME – AD419 Training
- d. Grant Resources – on CAFE Business Center web site; link is in the attached handout.

### 4. Finance & Budget

- a. Position Budget Review
- b. FY '20 Fund Balance Update
- c. FY '21 Budget Cut Update

**\*\*NEXT MEETING: February 9, 2021, 9:00am**

<https://cafebusinesscenter.ca.uky.edu>

d. Commitment Update

**5. Miscellaneous**

- a. Analyst Shared Email Address
- b. Equipment Inventory – this year's capital inventory takes place from November 1 – December 15, 2020. The equipment inventory exceptions are all due electronically by January 31, 2021. If questions, please contact Andrew Gehring.

**At 10:00 a.m., we will have guest speakers to present a beginners' guide to Tableau Server.**

**(The Tableau overview power point was presented by Brent Porter and Sharona Lavender. Their presentation is attached to these notes to use a helpful Tableau resource.)**

**\*\*NEXT MEETING: February 9, 2021, 9:00am**

<https://cafebusinesscenter.ca.uky.edu>

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## HUMAN RESOURCES & PAYROLL UPDATES





**STAFF  
PERFORMANCE  
EVALUATIONS -  
2020**

# PREPARATION TIPS

## Update Position Descriptions

If any job duties changed in 2020 please work with your unit HR Admin to submit any updates by November 24.

## Prepare Communication

Consider scheduling a staff meeting to discuss:

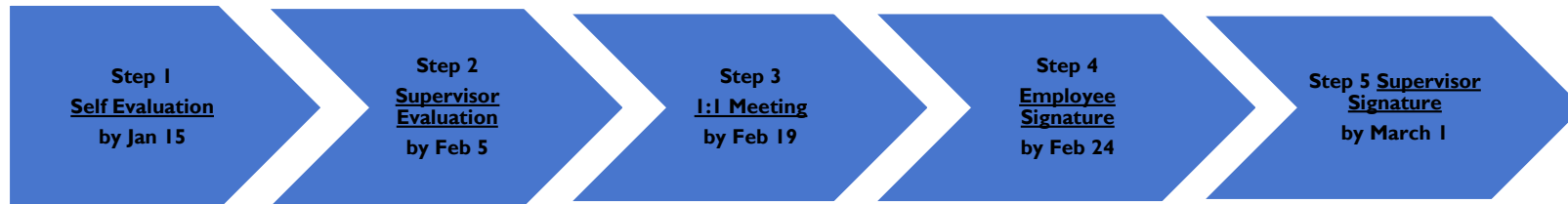
- Unit expectations and timeline
- Browser preferences: Chrome
- You could even show the Participating in Your Evaluation Video.

[HTTPS://CAFEBUSINESSCENTER.CA.UKY.EDU/RESOURCES/HR-PAYROLL/EMPLOYEE-RESOURCES/VIDEO-TUTORIALS](https://cafebusinesscenter.ca.uky.edu/resources/hr-payroll/employee-resources/video-tutorials)

**Pro Tip** – Avoid requesting a supervisor update until after a PE is complete.

# RECOMMENDED TIMELINE

- Self-Evaluations released **December 7**
- The CAFE PE deadline will be **March 1, 2021**



**\*The extension county offices will be using a slightly amended timeline**





Weekly status reports will be provided each week beginning in January.



Score reports will be provided to chairs/department heads in March.



Performance Improvement Plan information will be distributed to applicable supervisors in March.

## Reports

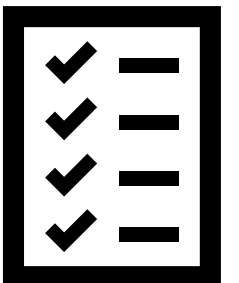
# RESOURCES

- **Employee Resources (CAFE) page:**

<https://cafebusinesscenter.ca.uky.edu/content/EmployeeResources>

- **Supervisor Resources (CAFE) page:**

<https://cafebusinesscenter.ca.uky.edu/content/SupervisorResources>





# TRAINING



**Lunch & Learn** (supervisors):

**Avoiding Bias in the Evaluation Process (Zoom)**

December 9, 2020 – email [christine.Fensin@uky.edu](mailto:christine.Fensin@uky.edu) to rsvp

Note: All Lunch & Learn sessions are recorded and available to view after the session.

[https://uky.az1.qualtrics.com/jfe/form/SV\\_1zRSNo7aqOnmw6l](https://uky.az1.qualtrics.com/jfe/form/SV_1zRSNo7aqOnmw6l)

# RETIREMENT PLANNING SESSIONS

Both **TIAA** and **Fidelity** offer phone/virtual consults.

- TIAA 1-800-842-2252
- Fidelity 1-800-328-6608
- TIAA also offers *Virtual* visits.

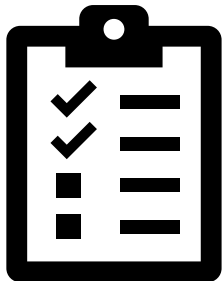
<https://shared.tiaa.org/public/publictools/events/meetingAndSeminar?employerId=1-6BGS-1>

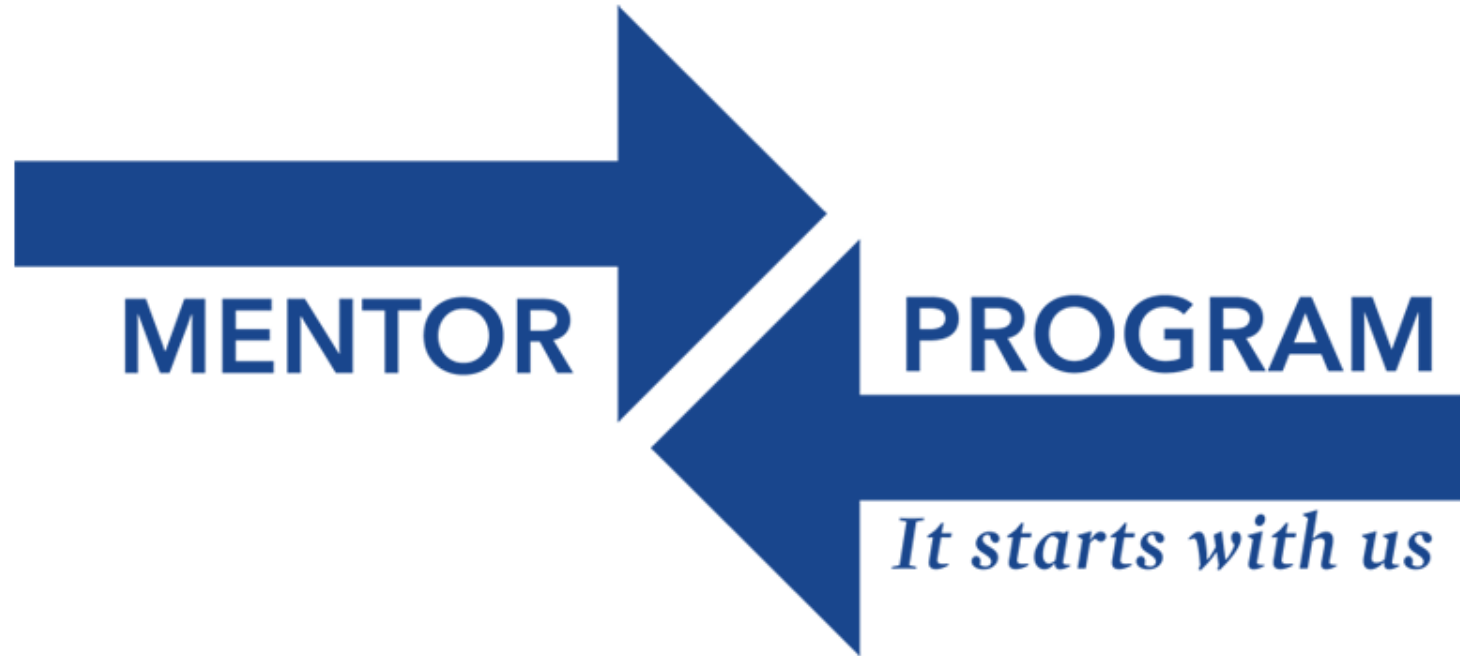


# FLU SEASON & FREE VACCINE

Flu shots are offered for UK employees at UK Retail and other Pharmacy locations. You just need to present your insurance card.

[go.uky.edu/flushot](https://go.uky.edu/flushot)





## MENTOR PROGRAM EXPANSION

EFFECTIVE OCTOBER 30TH THE CAFE MENTOR PROGRAM HAS EXPANDED TO INCLUDE FACULTY.

## Example Entry

Type of Leave	Start Date	End Date
HOLIDAY-Thanksgiving	11/26/2020	11/27/2020
HOLIDAY-Pres Election	11/03/2020	11/03/2020
Type of Leave	Start Date	End Date
HOLIDAY-New Year	01/01/2021	01/01/2021
HOLIDAY-Special	12/28/2020	12/31/2020
HOLIDAY-Christmas	12/25/2020	12/25/2020
HOLIDAY-Special	12/21/2020	12/24/2020



**HOLIDAYS:  
NOVEMBER &  
DECEMBER**

Eligible staff who worked on Labor Day (Sept. 7) can utilize the leave, as a floating holiday, through December. When employees submit the leave request, regardless of which day they plan to utilize the leave, the leave type should be recorded as Holiday-Labor Day.



**HOLIDAYS –  
REMINDER  
ABOUT  
LABOR DAY**

# EMERGENCY CLOSING INFO

Important points include:

- While some employees must still report to work during Plan B, in general, most will be non-designated. Should non-designated employees work during Plan B, they will not receive emergency closing time off to be taken at a later date. However, please review the specific guidelines related to remote work under #7 of the FAQs document.
- Employee designations may also change, based on the needs of the University or individual departments and colleges. It is important to discuss your position and Plan B category with your supervisor.
- If an emergency closing does occur, applicable hourly employees would record that time by selecting the Emergency Closing code on the Timesheet. For your convenience the QRC - Recording Emergency Closing Hours is available on the Employee Resources (CAFE) page.

**Emergency Closing FAQs:** <https://www.uky.edu/hr/hr-home/answers-to-frequently-asked-questions-regarding-emergency-delaysclosures-plan-b>

**University Emergencies policy:** <https://www.uky.edu/hr/policies/university-emergencies>

**Recording Emergency Closing Hours:** [https://cafebusinesscenter.ca.uky.edu/files/qrg\\_-\\_ess\\_emergency\\_closing\\_1.pdf](https://cafebusinesscenter.ca.uky.edu/files/qrg_-_ess_emergency_closing_1.pdf)

- If an employee's **mailing address** has changed, please ask them to update their address. Please note that address changes, for W2 purposes, will need to be made prior to January 8, 2021.
- It is also a good time to verify that their **UK Alert** information is up to date.
- Depending on county of residence, some employees will have 2 W2 documents to print, while others will have 1.
- The UK Benefits Office will be mailing the 1095 benefits forms to applicable employees.
- Employees who have separated will no longer have access to myUK. A hard copy W2 will be mailed to the address listed in SAP. For separated employees, HR Administrators have access to enter address updates as needed.

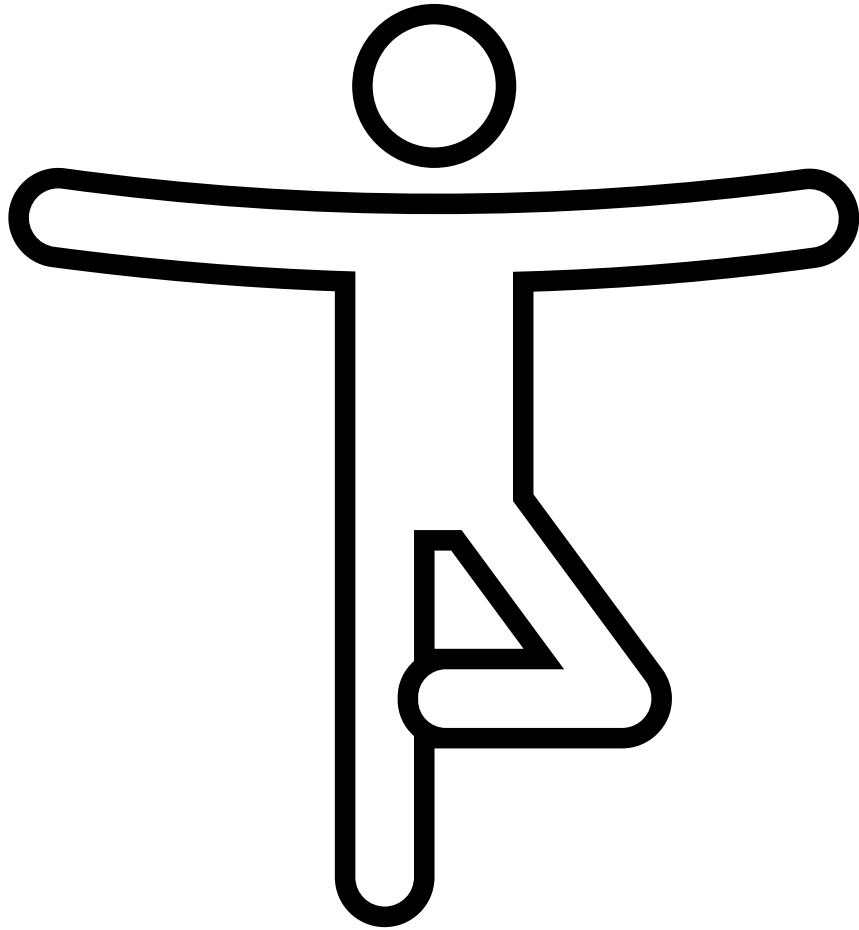
**New** - <https://mydocs.uky.edu/>



## W-2 REMINDERS







STRETCH  
BREAK!

# END OF CALENDAR YEAR PAYROLL COVERAGE

## **BW PP 24 (11/8-11/21/20)**

- Time entry should be recorded by 12:00 EST on Tuesday 11/17/20 to allow supervisors ample time to approve before the Thanksgiving holiday.
- Plan to review time reports on the morning of Thursday 11/19/20.
- The payroll deadline will be 12:00 EST on Monday, 11/23/20.

## **BW PP 26 (12/6 – 12/19/20) – We are requesting that time for PP26 & PPI be recorded at the same time**

- Time entry should be recorded by 12:00 EST on Wednesday 12/16/20 to allow supervisors ample time to approve before the holidays.\*\*
- Plan to review payroll reports the morning of Thursday, 12/17/20.
- Payroll deadline for BW PP 26 is 12:00 EST on Monday, 12/21/20.
- Chris Fensin and Melissa Horton will be working on 12/21 & 12/31 in case you need to reach one of them. Please provide them with your cell phone number, so they can reach you, in the event, they have a payroll question.

## **BW PP 1 (12/20/20-1/2/21) – We are requesting that time for PP26 & PPI be recorded at the same time**

- Time entry should be recorded by 12:00 EST on Wednesday 12/16/20 to allow supervisors ample time to approve before the holidays.\*\*
- Plan to review Timesheet, Unapproved Leave, and Unapproved Time Reports on the morning of Friday, 12/18/20.
- Chris Fensin and Melissa Horton will be working on 12/31/20 in case you need to reach one of them.



# ECRT DEADLINES

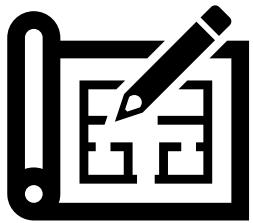
## ECRT

- ECRT FY21 Quarter I Pre-Review Oct 20 – Nov 9
- ECRT FY21 Quarter I Confirmation Nov 10 – Dec 8



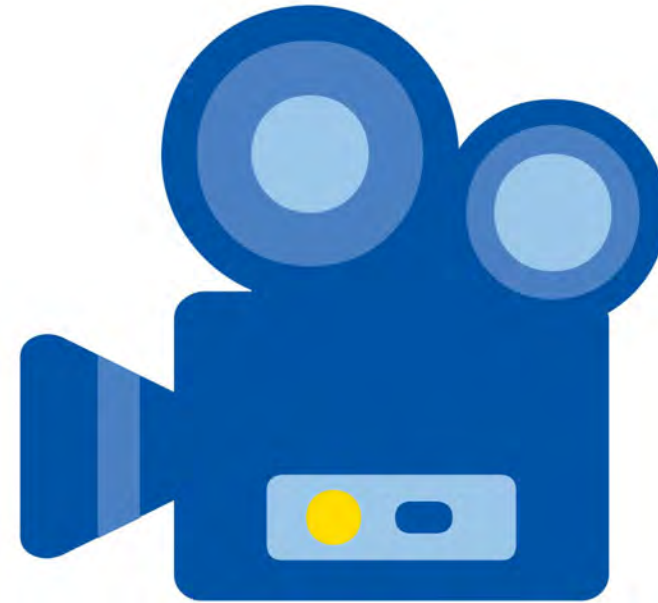
# PAYROLL EARLIEST RETRO DATE

- Payroll Earliest Retro date will reset on November 23, 2020 for BW, and the ERD date will change to 9/27/2020
- Payroll Earliest Retro date will reset on November 16, 2020 for MO, and the ERD date will change to 10/1/2020



# VIDEO TUTORIALS – NEW ADDITIONS

- [SAP - Adding Favorites](#)
- [How to Participate in Your Performance Evaluation](#)
- [Time Entry/Leave Tips & System Messages](#)
- [Microsoft Teams](#)



## Video Tutorials

<https://cafebusinesscenter.ca.uky.edu/resources/hr-payroll/employee-resources/video-tutorials>

## Resources

[Post Doc Scholar New Hire Checklist](#)

[Post Doc Scholar Exit Checklist](#)

[Post Doc Scholar FAQs](#)

[Summary of AR 5:1](#)

## Forms

[Absence Record](#)

[Notice of Appointment Form](#)

## Benefits & Enrichment Opportunities

[Benefits Eligibility Grid](#)

[Benefits Summary](#)

[Coffee Hour](#)

[Graduate School Resources](#)

[Orientation](#)

[Society of Post Doc Scholars](#)

## Contact Information

Office of Postdoctoral Affairs - Graduate School 859-257-2302

To request a leave tracker please email [agbusinesscenter@uky.edu](mailto:agbusinesscenter@uky.edu)

# POST DOC SCHOLAR RESOURCE PAGE

## REMOTE I-9 SCHEDULING @ SCOVELL HALL

- Advise the new hire of which documents will be needed, and ask him/her **to set up an appointment** to go to Scovell Hall to complete the I-9.
- Appointments can be scheduled at: [www.uky.edu/hr/i9](http://www.uky.edu/hr/i9)
- The link has been added to the IES section of the CAFE HR Administrator site.



LUNCH & LEARN: MICROSOFT  
TEAMS ADVANCED  
COLLABORATION

- November 12<sup>th</sup>
- RSVP:  
[christine.Fensin@uky.edu](mailto:christine.Fensin@uky.edu)





# PTI SAP ENTRY

- QRG – PTI SAP Entry:

[https://cafebusinesscenter.ca.uky.edu/files/qrg\\_-\\_part\\_time\\_instructors\\_sap\\_entry\\_-\\_101220.pdf](https://cafebusinesscenter.ca.uky.edu/files/qrg_-_part_time_instructors_sap_entry_-_101220.pdf)

- **Pro Tip:** Canvas access is granted **as soon as the assignment is entered in SAP.**
- Therefore, it is very important to coordinate the PES/I-9 process in a timely manner to allow the PTI **early Canvas** access for course preparation purposes.

# EMAIL & SOFTWARE ACCESS FOR EXITING EMPLOYEES

<https://mydocs.uky.edu/>

[Need help](#) 😊

## myDocs Self-Service Document Portal

Welcome to the myDocs self-service document portal where you may access and download official documents such as tax forms and unofficial transcripts. All documents are in PDF format.

### Documents Available:

- Student 1098T
- Student Unofficial Transcript
- Employee W-2
- Employee Pay stubs

### Former students, faculty, and staff

To access the document portal you will have to answer a few questions to verify your identity.

[Get Started](#)

### Current students, faculty, and staff

Log in using your current linkblue and password. You'll may also be asked to verify your identity utilizing Two-Factor Log-In.

[Login with linkblue](#)

# NEW HIRE MASK DISTRIBUTION



- Each week new hire masks are distributed
- CAFE employees receive two masks

## T-SHIRT DISTRIBUTION

- The UK Appreciation Day t-shirts for off campus orders were delivered to the CAFE Business Center on October 6<sup>th</sup>.
- All shirts have been sorted and delivered to the area coordinators for distribution. The coordinator for your area have made arrangements for delivery to each unit.
- We had 1,081 off campus t-shirt orders this year!



# SERVICE AWARDS



- College of Agriculture, Food and Environment recognizes staff employees with service awards to commemorate and acknowledge milestones for varying years of service to the University. Staff employees completing 5, 10, 15, 20, 25, 30, 35, 40, 45 and 50 years of regular employment with the University during **calendar year 2020** are eligible to receive their service award.
- Coordinators should return the order to Melissa Horton by
- **November 18.**



The University of Kentucky's  
*Circle of Love*

SPONSOR A CHILD THIS HOLIDAY SEASON

Follow this link:

<https://docs.google.com/spreadsheets/d/1ULEz64cNZ-mMiJxOW6HIIUHYIcEsCNqLz0Lhs25Q2KA/edit?usp=sharing>

November 1st- December 4th

Choose a school and shop gifts from their Amazon Wishlist! All gifts will be mailed directly to the schools you selected. If you would like to make a monetary donation, feel free to buy an amazon gift card through the Amazon link or send it by mail to their mailing address.

## **QRG – Creating & Using SAP Variants**

<https://cafebusinesscenter.ca.uky.edu/content/hr-administrator-resources>



**NEW  
RESOURCE -  
CREATING SAP  
VARIANTS QRG**



QUESTIONS?



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NOVEMBER 2020 USER'S GROUP



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PROCUREMENT & TRAVEL



## CONCUR EXPENSE TYPES - GL

- Submitted request to add 25 additional Expense Types to report
- Use QRC for Exception Purchase – Expense Type Exception Purchase GL 540364
  - Do not use a random expense type if you cannot find the appropriate expense type
  - Once Exception Purchase is used – you must edit the following month to the correct GL

## PROCARD VOUCHER

- Required to be **UPLOADED** – when pre-approval over \$500 exists
- Not required to be uploaded, but cardholder should submit to proxy for all expenditures under \$500
  - Document provides vital information for proxy to correctly create expense reports

## CONCUR EDIT DEADLINES

- Expense reports should be created, submitted and posted through all levels by the 15<sup>th</sup> of the month following the expenditure.
- One report should be submitted per cardholder per month if transaction count is less than 50 per month

## CONCUR – TABLEAU REPORT

- CONCUR Expense Report
  - Report to review pending and posted general and travel expense reports
- CONCUR Procard Transactions
  - Report to view pending and posted Procard transactions
- Each report can be filtered on posted/not-posted to SAP. Can also filter for reports that have been deleted and will not be submitted.

## CONCUR - RESOURCES

- CAFE Business Center Resources
  - <http://cafebusinesscenter.ca.uky.edu/content/travel-faqs-and-quick-reference-guides>

## RESEARCH & GRANTS

## SME – GRANTS TRAINING SERIES

- The Foundation – 8/20
- Awards Management – 9/17
- Awards Management – 10/15
- **Advanced Topics – 11/19**
- **CGO Topics – 12/17**
- All class times – 1:30-3:30PM
- ZOOM – Login information to be sent prior to class dates with presentation slides
- **Registration** (Use your AD login and password)
  - <https://acsg.uky.edu/webapps/register/>
  - *Includes suggested topics from survey in the spring.*
  - *Collaborative effort between the College Analysts and the College CGOs*

## FEDERAL FISCAL YEAR END – FY20

- Fiscal Year ended September 30<sup>th</sup>
- October – final edits by unit to clean up expense charges, final CONCUR postings, and posting accruals.
- November – finalize any remaining edits, final review for potential accruals due to CONCUR delayed postings to new fund. Complete all transactions and close the books.
- December - submit final report to NIFA for FFY20. Begin pulling and scrubbing data for AD-419 web app and update AD-419 training.
- January – AD-419 training and departmental completion of data input. ADR and CAFE Analyst review of AD-419 data. Submit REEport (AD-419) to NIFA at the end of January.

## SME – AD-419 TRAINING

- January 5<sup>th</sup> – 10AM-NOON
- Invite to follow

## GRANTS - RESOURCES

- CAFE Business Center Resources
  - <http://cafebusinesscenter.ca.uky.edu/grant-resources>



## FINANCE & BUDGET



## POSITION BUDGET REVIEW

- Position data will be sent in January; deadline to return will be included in details
- Request to review and provide updates to any 1018 position distributions
- Reminder FY21 budget cuts should be reviewed position by position to ensure accuracy and completeness.

## FY20 FUND BALANCE UPDATE – STATE & MANDATED

- Assumptions
  - Fund balances will be returned from PBO around February 2021
  - 6% PBO tax will remain
- New for FY20 Fund Balances (to receive in FY21)
  - 5% College tax
- Make effort to reduce expenditures to accommodate for unforeseen changes to fund balance returns.

## FY21 BUDGET CUT UPDATE

- FY21 Budget Cut Process – non-recurring
  - Departments with remaining NRCR cuts: the amount will be deducted from your fund balance after the PBO tax, but before the College tax.
  - The amount of the NRCR cut is the amount your unit will need to identify for the RCUR cut in FY22.
    - Utilize your unit's analyst to assist in evaluating data, running reports and assisting with planning; if needed. Make sure to use the position budget review process as a step to identify current position budgets rather than the initial unit budget review provided in July.



## COMMITMENT UPDATE

- Few commitments remain to be funded before we pause funding. Remaining commitments will be funded after the FY20 fund balance is returned from the PBO.
- Funding position-related commitments before operating-related commitments.

## MISCELLANEOUS

## ANALYST SHARED EMAIL ADDRESS

- [cafeanalysts@uky.edu](mailto:cafeanalysts@uky.edu)
- Will be used:
  - General monthly reports, reminders and financial operations deadlines.
  - If you email directly or reply to the email, it will be monitored by the analyst group and myself.
  - This is not to replace direct communication with your unit's analyst, but to streamline outgoing communication with a college-wide audience.

## EQUIPMENT INVENTORY

- Upcoming Training: November 11<sup>th</sup> @ 10:30AM via ZOOM

## G/L's Requested in Concur

530120	Animal Care Services
530122	Commercial/Oth Servi
530149	Promotional Items
530170	Participant Support
530190	Visiting Speaker Pay
530501	Official Guest Expen
531202	Duplicating
531306	Propane Gas
532010	Beverages for Resale
532025	Prepared Food-Resale
533023	M&R Building-Paint
533024	Exterminating
533026	M & R Ag Housing
533045	Garbage Disposal Ext
535027	Uniform&Linen Rental
540303	Ag Supply - Seeds
540304	Ag Supply-Fertilizer
540314	Compon Parts for CPE
540319	Electrical Supplies
540320	Electronic Supplies
540323	FS Utensils&Supplies
540326	Indus&Print Shop Sup
540336	Plumbing&Heat Supply
540353	Chemicals/herbicides

# Analytics Open Labs

Introduction to Tableau at the University  
of Kentucky

# Agenda

1. IRADS Introductions
2. Tableau Server
3. Tableau Server Access
4. Logging into Tableau Server
5. Tableau Server Navigation
6. Structure of Tableau
7. Interacting with Tableau
8. Downloading Data
9. Available Resources
10. Additional Training Options

1

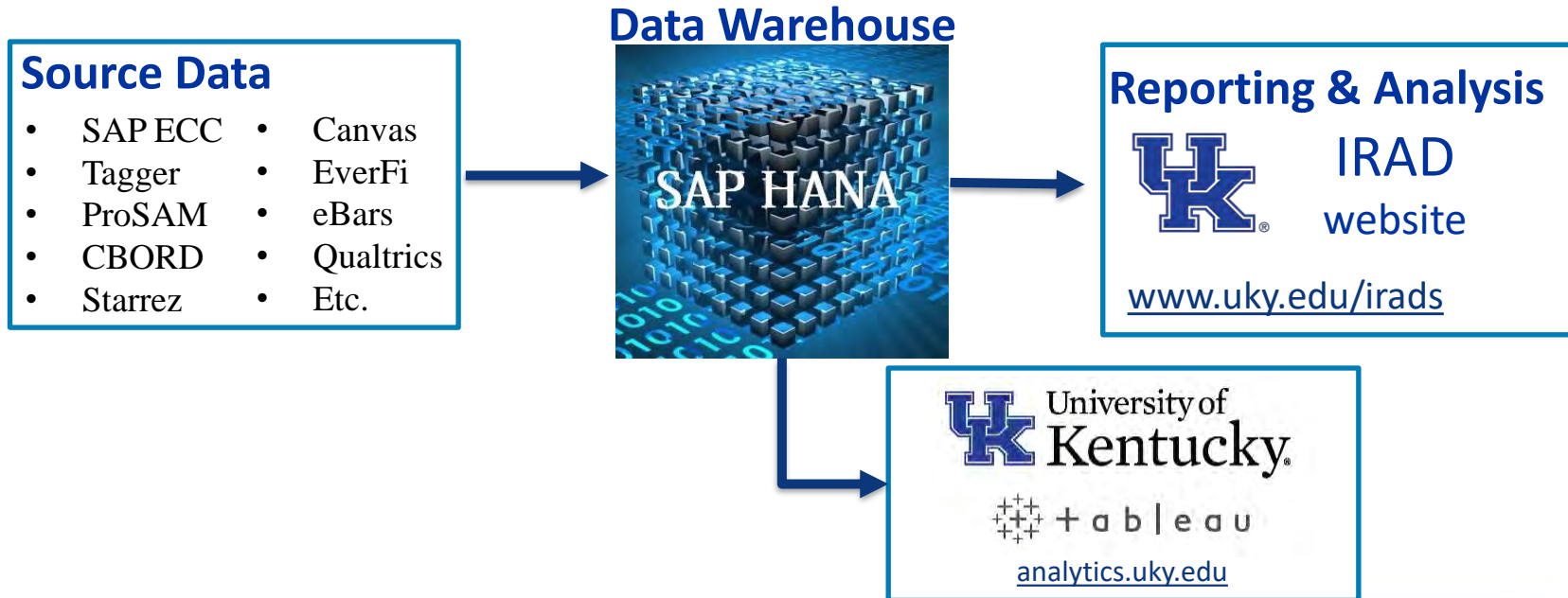
# IRADS Introduction

# IRADS Introduction

- Who we are?
  - Institutional Research, Analytics and Decision Support (IRADS)
- What we do?
  - Provide reliable, accurate and defensible information for University Students, Faculty, Staff and Administrators in order to meet regulatory reporting requirements, provide data to external organizations and supply Colleges and Departments the necessary information to effectively conduct institutional business.

# Data

- There are 30+ sources of data being brought into HANA Analytics.
- We make data available for reporting & analysis





# IRADS Areas of Data

## Finance & Administration

- Financial Management
- General Ledger
- Accounts Payable
- Financial Accounting
- Housing
- Dining
- Research

## Student Success

- Enrollment
- Degrees
- Admissions
- Retention & Graduation
- Tagger
- Academic Alerts
- Student Financial Aid

## Human Resources

- Faculty & Staff Headcounts
- Faculty & Staff Salary
- Faculty Database
- Instructional Faculty
- Labor Distribution
- Identity Management



2

# Tableau Server

# Tableau Server

- Web-based platform that houses reports available for University affiliates
- Free! - only requires access form to get set up
- This option satisfies most of our users' data needs

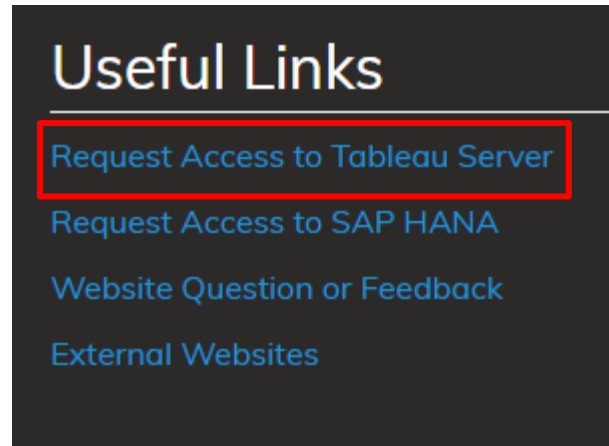


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## **Tableau Server Access**

# Requesting Access to Tableau Server

- Visit **Useful Links** at the bottom of our website to [request access](#)
- Area Security Officer (ASO) and project owner(s) will sign off on access
- IRADS will send an email once access has been granted



# Tableau User Access

- There are different types of access granted:
  - Tableau Server Access
    - This access allows users to view and download reports
  - Tableau Desktop Access (aka, Super User)
    - This access allows users to view, download, create and publish reports
    - Access to Tableau Desktop
  - Administrator Access
    - This access allows users the ability to perform view all workbooks, download, create and publish reports
    - Access to Tableau Desktop

# Tableau Server Access

## What Projects Do You Have Access To?

- **All Users**
  - All Tableau Server users have access to reports related to HANA data elements.
    - See details in [All Users Access Workbook](#)
  - Open Labs Beginner Workbook
    - See details in [Open Labs Beginner Workbook](#)
- **Addition Access Needed**
  - Additional access requires approval from Project Owner or the College/Business Unit project(s)



4

## **Logging into Tableau Server**



# Logging into Tableau Server

- Once you have been granted access, there are several ways to get to Tableau Server:
  - Visit [analytics.uky.edu](https://analytics.uky.edu)
    - Enter from the Interactive Fact Book on our website
- Sign in using Linkblue credentials



Sign in with your linkblue account

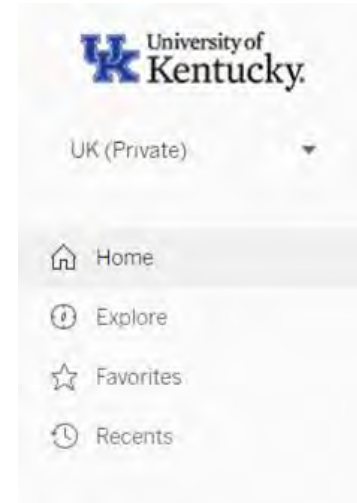
Sign in

5

# Tableau Server Navigation

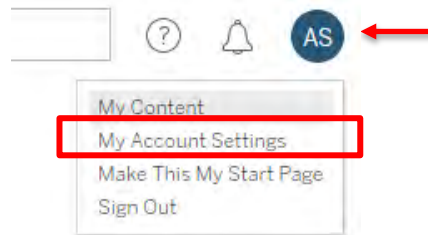
# Tableau Server Navigation

- Users can utilize the navigation pane with the following tabs:
  - **Home** - a brief overview of favorites, recents and what others are viewing
  - **Explore** - a listing of all projects, workbooks, views (similar to old Tableau Server landing page)
  - **Favorites** - any workbook or view you have favorited
  - **Recents** - your 12 most recently visited views



# Tableau Server Navigation

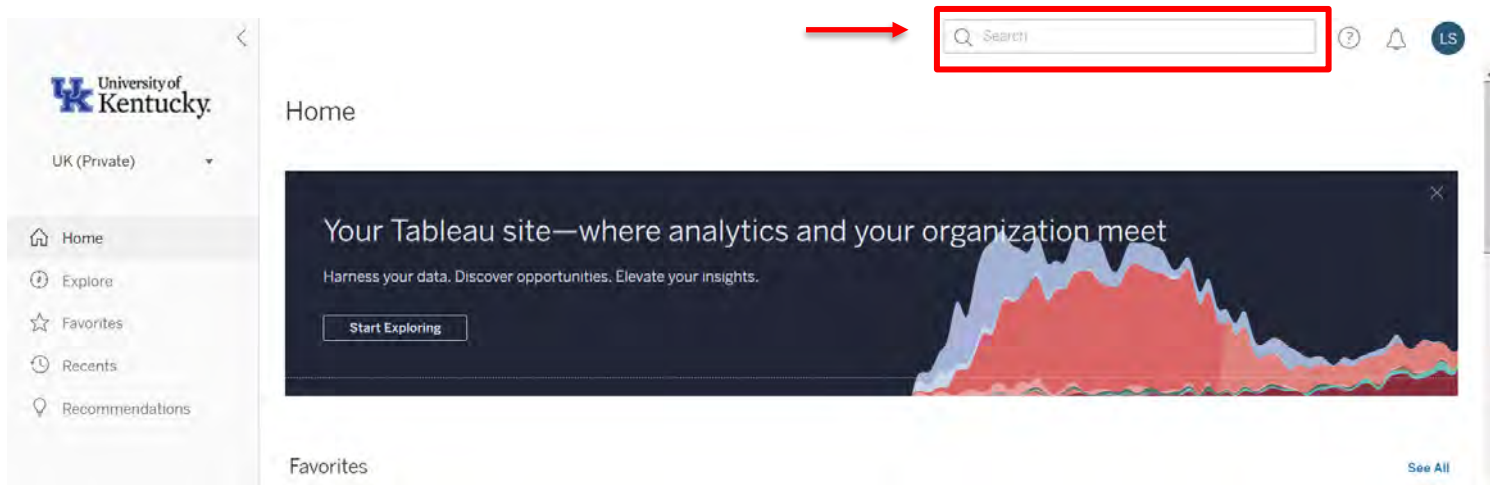
- You can choose to make any of the tabs your start page for when you log in
  - While on the desired tab, click on your initials in the top right corner and select **Make This My Start Page**



# Tableau Navigation

## Tableau Search Options

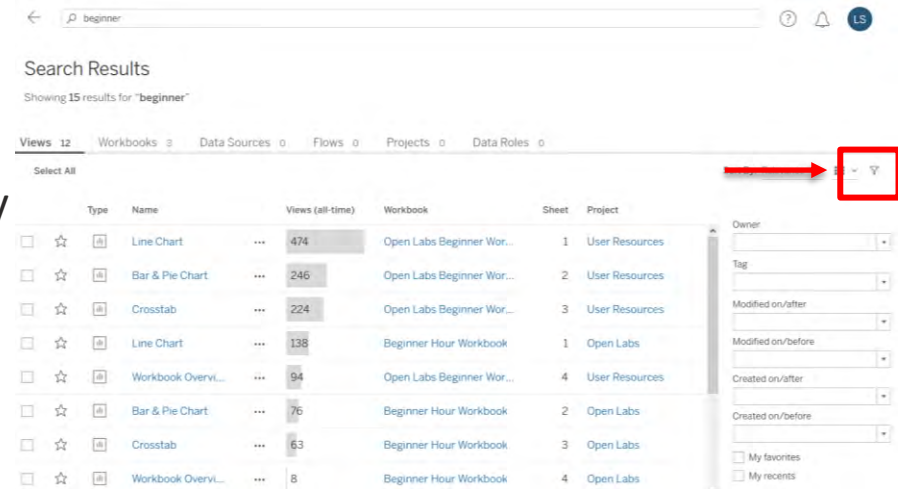
- Search Bar at the top of the Tableau Server screen
  - Scans for search term(s) throughout all of Tableau Server



# Tableau Navigation

## Tableau Search Options

- Filter menu on right hand side
  - Must be toggled on
  - Scans within area you are in (i.e. only that's where you are)
  - Offers more search criteria
    - Owner
    - Modified on/after
    - etc.



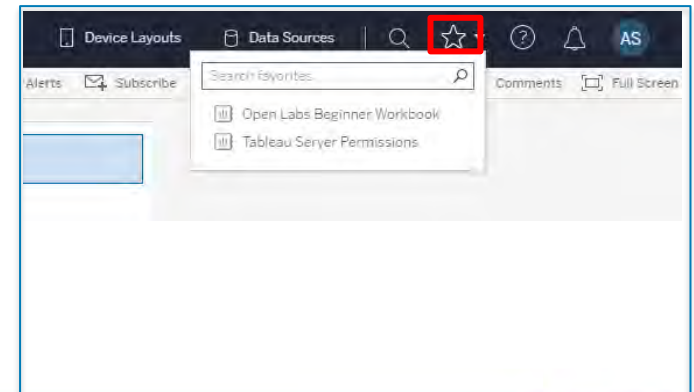
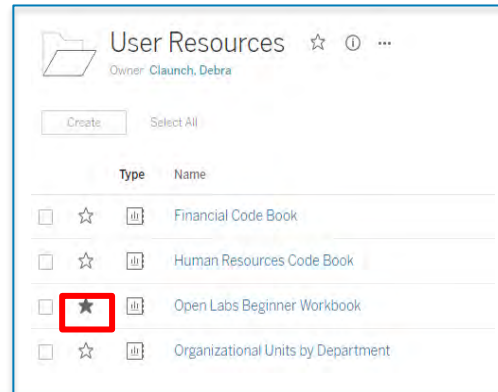
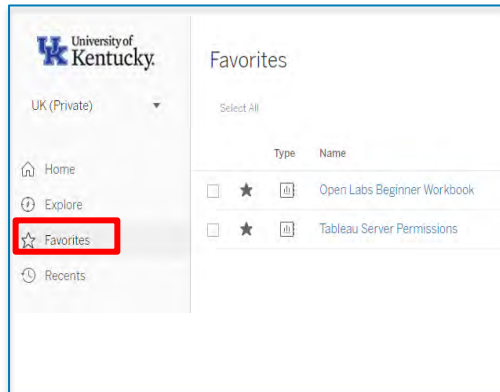
The screenshot shows the Tableau search interface. At the top, there is a search bar containing the text 'beginner'. Below the search bar, the text 'Search Results' is displayed, followed by 'Showing 15 results for "beginner"'. A navigation bar shows 'Views 12', 'Workbooks 3', 'Data Sources 0', 'Flows 0', 'Projects 0', and 'Data Roles 0'. Below this is a table of search results with columns for Type, Name, Views (all-time), Workbook, Sheet, and Project. The table lists several items, including 'Line Chart', 'Bar & Pie Chart', and 'Crosstab'. To the right of the table is a filter menu with a dropdown arrow, which is highlighted with a red box and a red arrow pointing to it. The filter menu includes options for 'Owner', 'Tag', 'Modified on/after', 'Created on/after', and 'Created on/before', along with checkboxes for 'My favorites' and 'My recents'.

Type	Name	Views (all-time)	Workbook	Sheet	Project
Line Chart		474	Open Labs Beginner Wor...	1	User Resources
Bar & Pie Chart		246	Open Labs Beginner Wor...	2	User Resources
Crosstab		224	Open Labs Beginner Wor...	3	User Resources
Line Chart		138	Beginner Hour Workbook	1	Open Labs
Workbook Overvi...		94	Open Labs Beginner Wor...	4	User Resources
Bar & Pie Chart		76	Beginner Hour Workbook	2	Open Labs
Crosstab		63	Beginner Hour Workbook	3	Open Labs
Workbook Overvi...		8	Beginner Hour Workbook	4	Open Labs

# Tableau Navigation

- **Marking a Workbook or View as ‘Favorite’**

- Star a workbook or view that you visit often for quick access by clicking on the star icon to the left of it
- View all starred workbooks using the favorites tab located on the navigation pane on the left OR the star icon when looking at a view





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## **Structure of Tableau**



# Structure of Tableau

## Projects(folders)

Collection of related reports that can be University wide or College/Business Unit Specific

## Workbooks

Custom built reports created by IRADS or Super Users

## Views

Are the individual dashboards, stories and sheets contained within a workbook.

# Projects

The screenshot shows the 'Explore' page in the University of Kentucky Analytics tool. A dropdown menu is open under 'Top-level Projects', listing 'Top-level Projects' (150), 'All Projects' (33), 'All Workbooks' (2,954), 'All Views' (12,601), and 'All Data Sources'. A blue callout bubble points to this menu with the text: 'Projects area collections of similar files' and 'Like a folder'. Below the menu is a table of project folders with columns for Type, Name, Projects, Workbooks, Views, Data sources, Owner, and Created.

Type	Name	Projects	Workbooks	Views	Data sources	Owner	Created
Folder	Analytics Community of Practice	0	3	21	0	Claunch, Debra	Oct 5, 2016 9:22 AM
Folder	Academic Excellence Strategic Communication	0	24	58	3	Claunch, Debra	May 18, 2017 7:32 AM
Folder	Accounts Receivable Aging Committee	0	1	10	0	Formash, Crista G	Aug 17, 2018 2:19 PM
Folder	Admissions and Registrar	0	21	52	0	Claunch, Debra	Jul 11, 2018 8:55 AM
Folder	Analytics Community of Practice	0	58	274	0	Burr, Stephen	Feb 11, 2014 8:16 AM
Folder	Athletics - CATS	0	7	21	0	Claunch, Debra	Feb 6, 2017 3:04 PM
Folder	Athletics - Ticket Office	0	3	3	0	Claunch, Debra	Jul 28, 2015 8:02 AM
Folder	Auxiliary Services	0	7	15	0	Claunch, Debra	Oct 10, 2017 3:26 PM
Folder	Auxiliary Services - Administration	1	6	18	0	Claunch, Debra	Nov 13, 2017 7:52 AM
Folder	Business Officer Reports	1	5	45	0	Claunch, Debra	Jun 20, 2017 12:44 PM
Folder	Campus Safety	0	4	54	0	Burr, Stephen	Nov 10, 2014 11:09 AM
Folder	Career Advising	0	3	4	0	Claunch, Debra	Nov 17, 2016 7:50 AM
Folder	CARES	0	11	29	0	Claunch, Debra	Mar 15, 2016 11:21 AM
Folder	CATS SeeSafety	0	6	33	0	Recktenwald, Adam J	Mar 11, 2015 4:31 PM
Folder	Center for Clinical and Translational Science (CCTS)	0	1	3	0	Claunch, Debra	Aug 15, 2016 11:47 AM
Folder	Center for the Enhancement of Learning and Teaching (CELT)	0	7	23	1	Claunch, Debra	Feb 20, 2017 3:35 PM
Folder	College of Agriculture, Food and Environment	0	21	105	2	Burr, Stephen	Nov 20, 2013 2:23 PM

# Workbooks

Workbooks are custom built reports created by IRAA or Super Users

Like Excel Workbooks

	Views (All-time)	Sheets	Size	Project	Owner	Modified
Sections	157	1	4377 KB	College of Arts & Sciences	Wilson, Raegan	Aug 18, 2017 10:32 AM
%Earned Hours AS	12	2	551.6 KB	College of Arts & Sciences Dean	Hedge, Jesse	Apr 19, 2017 1:37 PM
100 - 200 Level Courses Taught by TAs and Part-Time Faculty	6	1	128.6 KB	College of Communication and Infor...	Lane, Derek R	Dec 1, 2014, 2:49 PM
1098T	7	2	146.0 KB	Student Account Services - Administr...	Fornash, Crista G	Jan 30, 2019, 11:25 AM
1098T Email Address	7	1	519.1 KB	Student Account Services - Administr...	Fornash, Crista G	Jan 31, 2019, 5:24 PM
1098T Enrollment Report	8	1	442.3 KB	Student Account Services - Administr...	Shanks, Tina L	Dec 6, 2017, 11:28 AM
17-18 Awards	67	1	304.1 KB	Financial Aid - Administration	Wiggins, Nimmi	Mar 19, 2018, 3:58 PM
1G-Chellgren Lunch	29	1	288.6 KB	Undergraduate Education	Thuringer, Christop...	Apr 29, 2015, 4:10 PM
1st Spring to 2nd Fall Retention by UK GPA	35	2	587.9 KB	Analytics Community of Practice	Rudick, Craig S	Jan 5, 2017, 1:22 PM
1st Year Student Courses and Instructors	14	4	445.6 KB	User Reports	Thuringer, Christop...	May 21, 2019, 10:36 AM
2015-2020 Strategic Plan Metrics - internal version	155	5	122.7 KB	Strategic Planning	Albers, Shelby D	Oct 15, 2018, 11:40 AM
2015-2020 Strategic Plan Metrics - website version	16	5	117.2 KB	Strategic Planning	Albers, Shelby D	Sep 24, 2018, 1:52 PM
2016 COC	186	4	1.4 MB	Student Affairs	Thuringer, Christop...	Jul 26, 2016, 2:31 PM
2016 COC v2	55	3	1.3 MB	Undergraduate Education	Thuringer, Christop...	Jul 7, 2016, 3:53 PM
2016 COC v2	86	4	1.4 MB	Student Affairs	Thuringer, Christop...	Aug 3, 2016, 11:45 AM
2016 IPEDS HR SUBMISSIONS	6	13	21.1 KB	ITS AA Test	Alexander, Bob	Mar 27, 2017, 4:39 PM
2017 COC	7	4	481.9 KB	Student Affairs	Blevins, Justin A	Sep 14, 2017, 2:58 PM

# Views

Views are a single sheet in a workbook

Like a sheet in Excel

The screenshot shows the University of Kentucky analytics dashboard. On the left is a navigation sidebar with 'Home', 'Explore', 'Favorites', and 'Recents'. The main area is titled 'Explore' and shows a list of views. A dropdown menu is open over the 'All Views' entry, showing a count of 12,681. The main table lists various views with columns for 'Views (All-time)', 'Workbook', 'Sheet', 'Project', 'Owner', and 'Modified'. A blue callout box points to the 'All Views' entry in the dropdown menu.

	Views (All-time)	Workbook	Sheet	Project	Owner	Modified
...	1	Parking and Transportation ...	14	ITS Advanced Analytics - ...	Claunch, Debra	Sep 29, 2016, 12:01 PM
...	11	AT & CA View Dependencies	1	ITS AA Test	Rudick, Craig S	Jun 30, 2015, 12:01 PM
...	51	HANA Metrics	1	ITS AA Test	Burr, Stephen	Jun 4, 2014, 10:34 AM
...	13	High Level Travel Report	7	Sydney	Conner, Whitney A.	Jul 15, 2019, 8:36 AM
...	7	Graduation Timing	14	Undergraduate Education	Rudick, Craig S	Jul 10, 2015, 10:32 AM
...	9	Graduation Timing	13	Undergraduate Education	Rudick, Craig S	Jul 10, 2015, 10:32 AM
...	15	Graduation Timing	12	Undergraduate Education	Rudick, Craig S	Jul 10, 2015, 10:32 AM
...	16	Global Dynamics Enrollmen...	11	International Center	Blevins, Justin A	Jul 15, 2019, 3:30 AM
...	9	IT Requests Workbook	6	Student Affairs	Starkey, Mary Kath...	Jul 15, 2019, 12:12 AM
...	2	verify jaynas CATS 2017 vie...	4	ITS AA Test	Lindstrom, Adam F	Feb 24, 2017, 6:16 PM
...	2	verify jaynas CATS 2017 vie...	5	ITS AA Test	Lindstrom, Adam F	Feb 24, 2017, 6:16 PM
...	1	verify jaynas CATS 2017 vie...	6	ITS AA Test	Lindstrom, Adam F	Feb 24, 2017, 6:16 PM
...	1	verify jaynas CATS 2017 vie...	7	ITS AA Test	Lindstrom, Adam F	Feb 24, 2017, 6:16 PM
...	5	IT Requests Workbook	10	Student Affairs	Starkey, Mary Kath...	Jul 15, 2019, 12:12 AM
...	1	verify jaynas CATS 2017 vie...	8	ITS AA Test	Lindstrom, Adam F	Feb 24, 2017, 6:16 PM
...	0	LLP Selection	17	College of Engineering - A...	Theakston, Robert H	Jun 9, 2017, 9:25 AM
...	27	Percent_Change	2	ITS AA Test	Thuringer, Christop...	Jul 15, 2019, 12:31 AM



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## **Interactive with Tableau**

# Tableau Views

- There are four different views for the workbook shown below.

The screenshot displays the Tableau interface for a workbook titled "Open Labs Beginner Workbook". The left sidebar shows navigation options: Home, Explore, Favorites, Recents, and Recommendations. The main content area shows the workbook details, including the owner "Albers, Shelby D." and the modification date "Apr 5, 2019, 9:28 AM". Below the workbook title, there is a table of views. The table has columns for "Type", "Name", and "Views (all-time)". Four views are listed: "Line Chart" (474 views), "Bar & Pie Chart" (246 views), "CrossTab" (225 views), and "Workbook Overview" (95 views). Red arrows point to the view icons for each of these four views.

Type	Name	Views (all-time)
Line Chart	Line Chart	474
Bar & Pie Chart	Bar & Pie Chart	246
CrossTab	CrossTab	225
Workbook Overview	Workbook Overview	95

# Data Sources

- The Data Sources provide the source in which the information is retrieved from.

The screenshot displays the 'Open Labs Beginner Workbook' interface. The left sidebar shows the University of Kentucky logo and navigation options: Home, Explore, Favorites, Recents, and Recommendations. The main content area shows the workbook title 'Open Labs Beginner Workbook' by Shelby D. Albers, modified on April 5, 2019. Below the title is an 'Edit Workbook' button. The 'Data Sources' tab is active, showing a table of data sources. The table has columns for 'Type', 'Name', 'Connects to', and 'Data is'. Three data sources are listed:

Type	Name	Connects to	Data is
[Icon]	Open Labs - ACTIVE ...	Open Labs - ACTIVE_MAIN_ASSIGNMENTS_ANNUAL_SNAPSHOT (EMPLOYEE ACTIVE_MAIN_ASSIGNMENTS_ANNUAL_SNAPSHOT) (EMPLOYEE).hyper (Dat...	Live
[Icon]	Open Labs - ENROL...	Open Labs - ENROLLED_STUDENTS_CPE_IPEDS (STUDENT ENROLLED_STUDENTS_CPE_IPEDS) (STUDENT).hyper (Data/Datasources)	Live
[Icon]	Open Labs - Travel ...	Open Labs - Travel Expenses.hyper (Data/Datasources)	Live

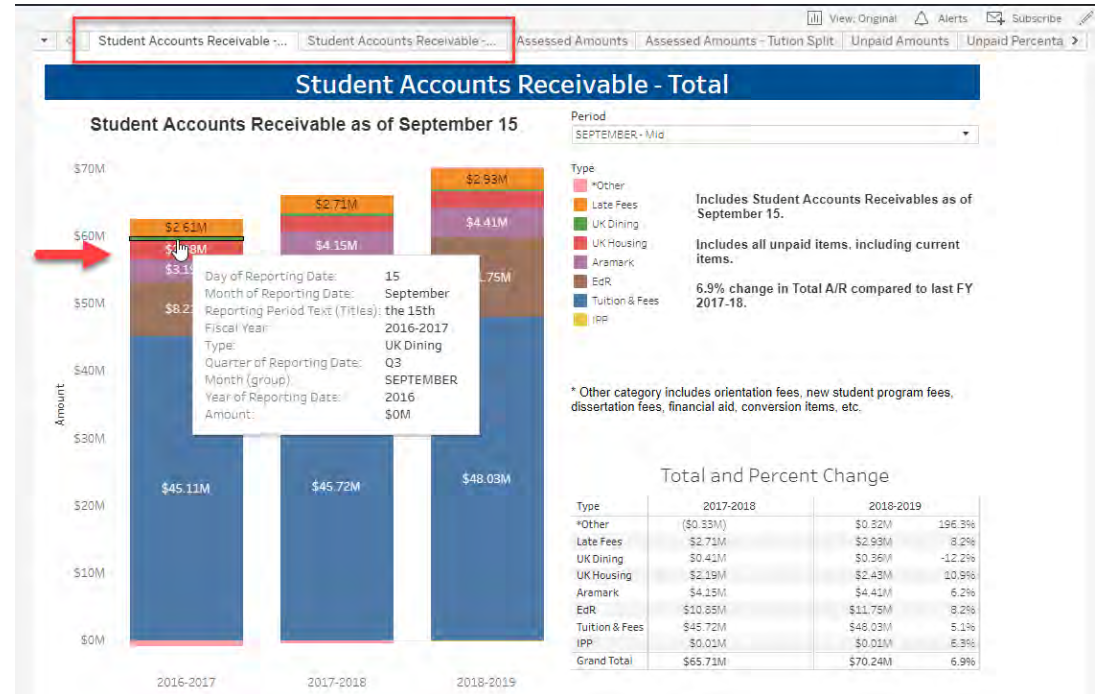
# Interacting with Tableau Workbooks

## Tabs

- Navigate to views like sheets in Excel

## Hover

- Hover over data points to see additional information
- This is called a tooltip and data displayed is customizable when creating the workbook

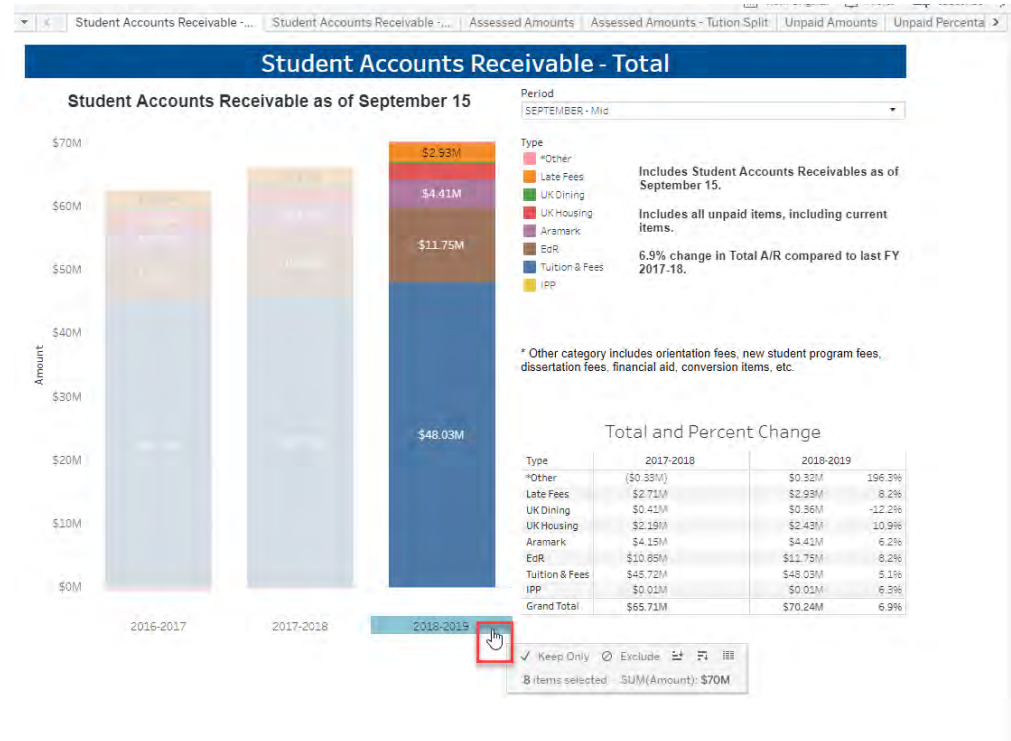




# Interacting with Tableau Workbooks

## Highlighting

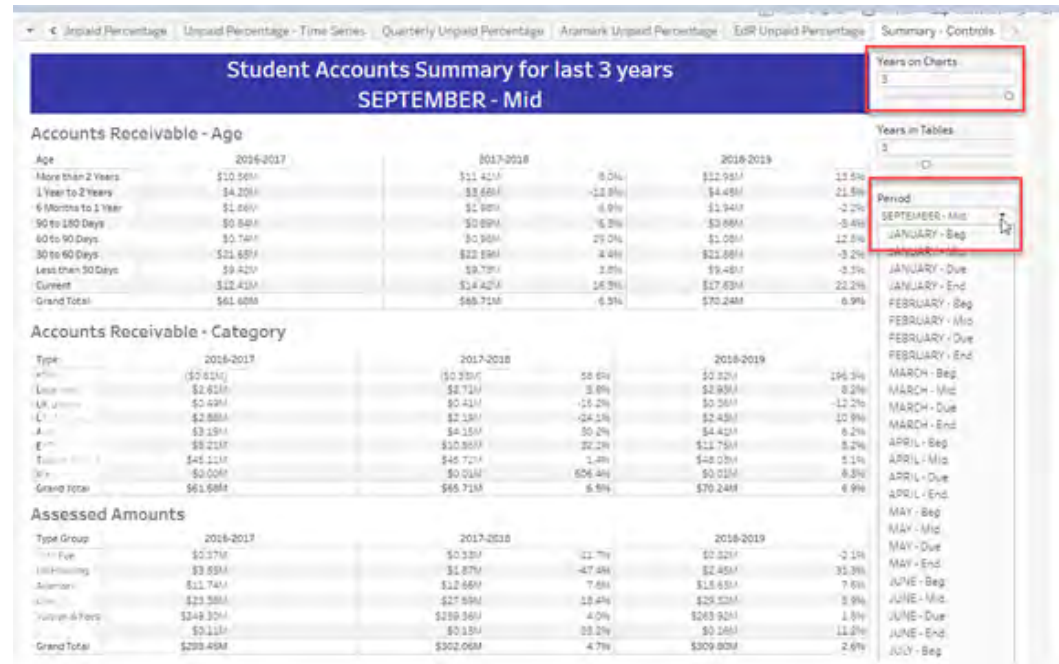
- Click any data point to highlight it (Ctrl + to select multiples)
- Remaining data is grayed out
- Click in any white space to return to normal



# Interacting with Tableau Workbooks

## Filtering

- Use dropdowns and lists to drill into a specific data set
- Other filters can look like radio buttons or sliders





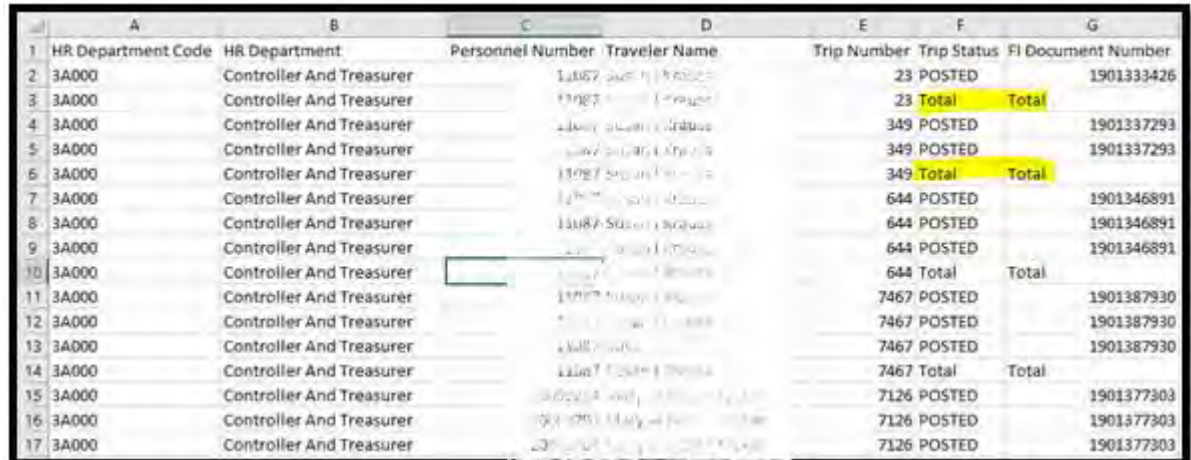
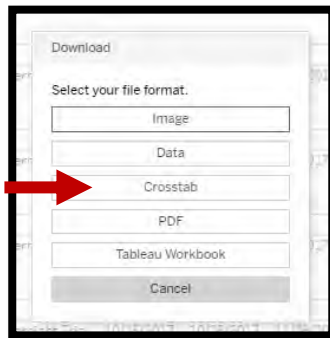
8

## **Downloading Data**

# Download to Excel

## Download to 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.



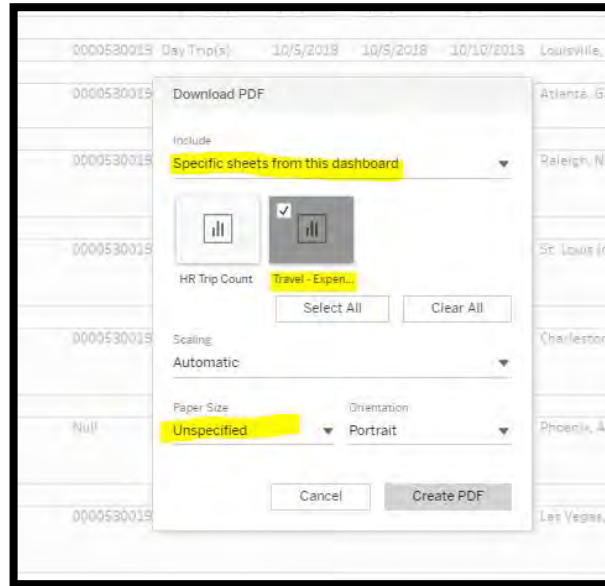
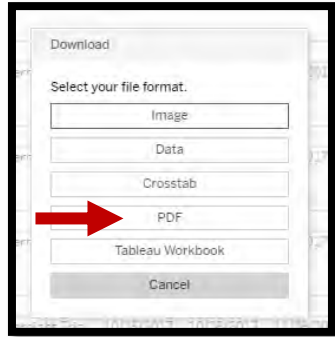
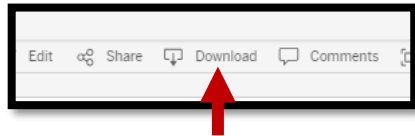
A screenshot of a Tableau data table. The table has columns: HR Department Code, HR Department, Personnel Number, Traveler Name, Trip Number, Trip Status, and FI Document Number. The data is organized into rows, with some rows representing subtotals. The subtotal rows are highlighted in yellow. A red arrow points from the 'Download' button in the previous image to the 'Crosstab' option in the dialog box, and another red arrow points from the dialog box to the data table.

	A	B	C	D	E	F	G
	HR Department Code	HR Department	Personnel Number	Traveler Name	Trip Number	Trip Status	FI Document Number
1							
2	3A000	Controller And Treasurer	11057 Susan E Arbus		23	POSTED	1901333426
3	3A000	Controller And Treasurer	11087 Susan E Arbus		23	Total	Total
4	3A000	Controller And Treasurer	11064 Susan E Arbus		349	POSTED	1901337293
5	3A000	Controller And Treasurer	11067 Susan E Arbus		349	POSTED	1901337293
6	3A000	Controller And Treasurer	11087 Susan E Arbus		349	Total	Total
7	3A000	Controller And Treasurer	11077 Susan E Arbus		644	POSTED	1901346891
8	3A000	Controller And Treasurer	11087 Susan E Arbus		644	POSTED	1901346891
9	3A000	Controller And Treasurer	11064 Susan E Arbus		644	POSTED	1901346891
10	3A000	Controller And Treasurer	11067 Susan E Arbus		644	Total	Total
11	3A000	Controller And Treasurer	11077 Susan E Arbus		7467	POSTED	1901387930
12	3A000	Controller And Treasurer	11067 Susan E Arbus		7467	POSTED	1901387930
13	3A000	Controller And Treasurer	11067 Susan E Arbus		7467	POSTED	1901387930
14	3A000	Controller And Treasurer	11067 Susan E Arbus		7467	Total	Total
15	3A000	Controller And Treasurer	11067 Susan E Arbus		7126	POSTED	1901377303
16	3A000	Controller And Treasurer	11067 Susan E Arbus		7126	POSTED	1901377303
17	3A000	Controller And Treasurer	11067 Susan E Arbus		7126	POSTED	1901377303

# Download to Excel

## Download to PDF

- Include: Specific sheets from this dashboard
- Paper Size: Unspecified



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## **Additional Resources**

# Additional Resources

## Additional Tableau Training Resources

- [Getting Started with Tableau Server](#)
- [Interacting with Content on Tableau Server](#)

## UK Resources

- Tableau Server resource page (<http://www.uky.edu/iraa/tableau/>)
- Open Labs ([www.uky.edu/irads](http://www.uky.edu/irads))
- Reach out ([analytics@uky.edu](mailto:analytics@uky.edu))

A large blue circular graphic is positioned at the top of the slide, partially cut off by the top edge. The number 10 is centered within this blue area.

10

## **Additional Training Options**



# Additional Trainings/Questions

- If you are interested in becoming a Super User for your College or business unit, please send an email to IRADS ([analytics@uky.edu](mailto:analytics@uky.edu))
  - We will collect some information from you and schedule additional trainings.
- If you have questions later:
  - Reach out to the super user(s) within your College or business unit
  - Set up a time to chat with one of our analysts at the next Open Labs session by filling out our contact form - [www.uky.edu/irads](http://www.uky.edu/irads)



**Thank you for your time!**