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USING TABLEAU FOR GM REPORTING

An End User Guide to Using Tableau for GM Reports at the
University of Mississippi

Table of Contents

Accessing Tableau	3
Entering Variables	3
Grant Summary for Department	3
<i>Grant Summary for Department Tab</i>	3
Changing Tab Views	7
<i>Grant Summary Tab</i>	7
<i>Detailed Grant Expense/Commitments/Budget Report Tabs</i>	8
<i>Payroll Details Tab</i>	9
Page Options	11
Undo	11
Redo	11
Revert	11
Refresh	11
Pause	11
Resume	11
Context Menu	12
Keep Only and Exclude	12
Sorting Values	12
View Data	12
Sorting Alphabetically	13
Saving and Sharing your View	13
Creating a Personalized View	13
Managing Views	14
<i>Public vs Private View</i>	14
<i>Deleting a View</i>	14
<i>Sharing a View</i>	15
<i>Downloading and Printing Views</i>	15
Download Image	15
Download Data	16
<i>Summary Data</i>	16
<i>Full Data</i>	16
Download Crosstab	17
Download PDF	17
Download Tableau Workbook	18

Accessing Tableau

Tableau reports are available through the Analytics tab in myOleMiss. Current GM reports are under the GM Departmental tab of Analytics. In order to generate the report, it must be opened in a new browser window.

Tableau does not work on Safari. You will need to access the reports through Chrome, Firefox, Internet Explorer, or Microsoft Edge.

To get access, go to sap.olemiss.edu/getting-started and fill out the Web Application Access Request Form.

If you have any issues with accessing the reports or with the data in the reports, please contact sap@olemiss.edu and they will direct your issue to the correct person.

Entering Variables

Grant Summary for Department

When you initially log into the Grant Summary for Department Report you will see the blank 'shell' of the report. To see any data in the report, you will need to choose at least one Grant PI Name. Once you select a PI, the report will generate and all other variables will show valid options based on the chosen PI.

Note: The PI must be selected on the Grant Summary for Department tab before the reports within the other tabs can be generated.

Grant Valid To Date	Grant Number	Sponsor Name	Unfunded Cost Share
6/30/2014	12/31/9999	(All)	(All)

Funds Center	Sponsored Program	Grant PI Name	Life Cycle Status
(All)	(All)	(None)	(All)

Grant Summary for Department Tab

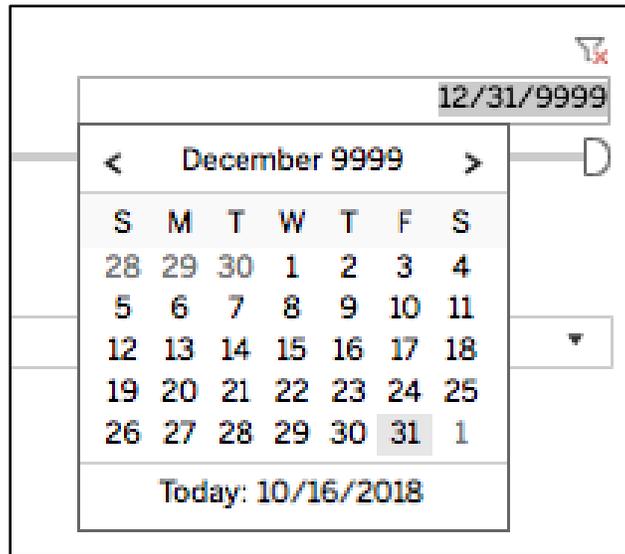
Grant Valid To Date

The Grant Valid To Date variable allows you to choose a range of dates for valid grants. The default is for all valid values in the system.

Grant Valid To Date

6/30/2014 12/31/9999

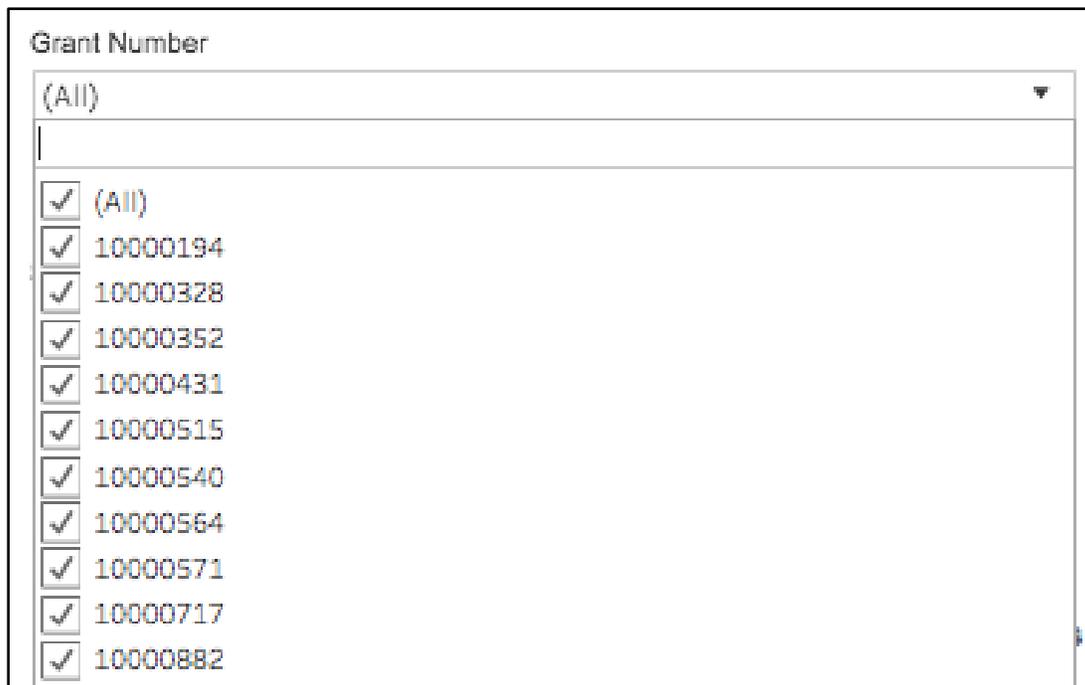
You can change the date range by dragging the slider from either end of the range or by clicking on one of the dates and typing in a new date or choosing from the calendar prompt.



Note: Since many Grants have a 'Long Living' date of 12/31/9999, using the slider option for the date range may not be useful and you should change the dates by clicking on the shown date and either typing in a new date or selecting it from the calendar prompt.

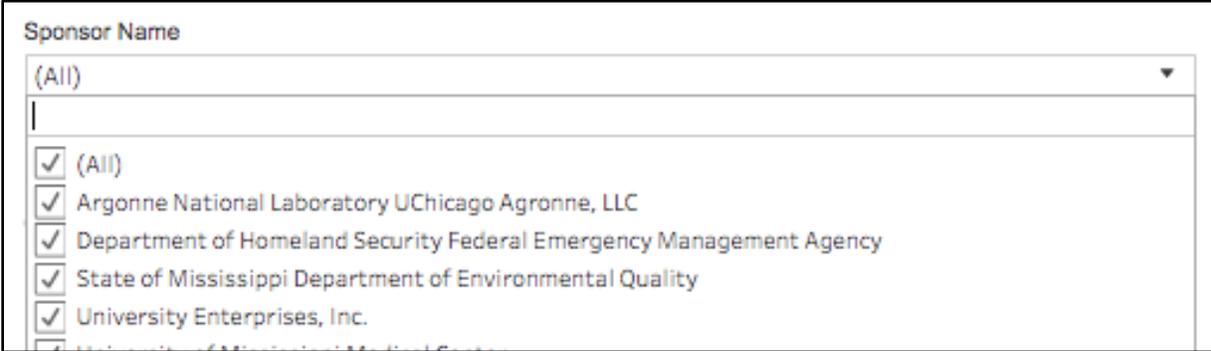
Grant Number

The Grant Number variable is a dropdown that will allow you to select multiple values. The default option is for all grants to be selected.



Sponsor Name

The Sponsor Name variable is a dropdown that will allow you to select multiple values. The default option is for all Sponsors to be selected.

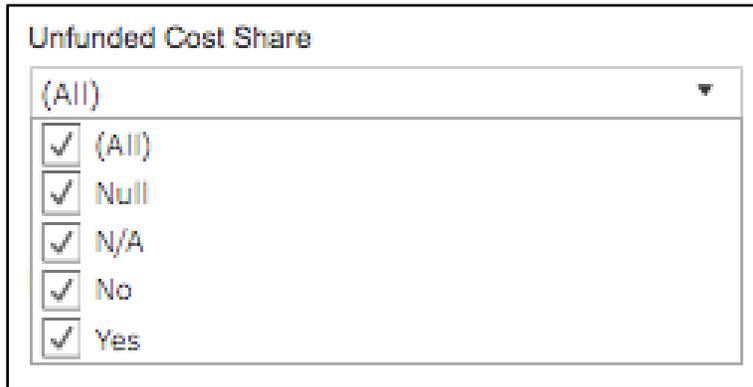


The screenshot shows a dropdown menu titled "Sponsor Name". The current selection is "(All)". Below the dropdown, a list of options is displayed, each with a checked checkbox:

- (All)
- Argonne National Laboratory UChicago Agronne, LLC
- Department of Homeland Security Federal Emergency Management Agency
- State of Mississippi Department of Environmental Quality
- University Enterprises, Inc.

Unfunded Cost Share

The Unfunded Cost Share variable is a dropdown that will allow you to select multiple values. The default option is for all options to be selected. (In SAP, you have the option to choose Yes, No, N/A, or nothing – if there was nothing selected, the value of 'Null' will be shown in the filter.)

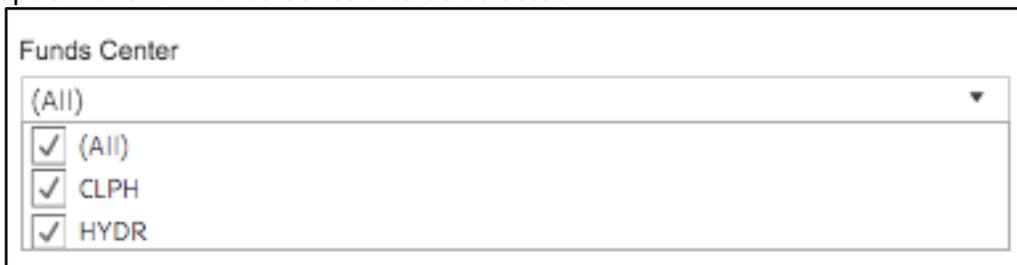


The screenshot shows a dropdown menu titled "Unfunded Cost Share". The current selection is "(All)". Below the dropdown, a list of options is displayed, each with a checked checkbox:

- (All)
- Null
- N/A
- No
- Yes

Funds Center

The Funds Center variable is a dropdown that will allow you to select multiple values. The default option is for all Funds Centers to be selected.

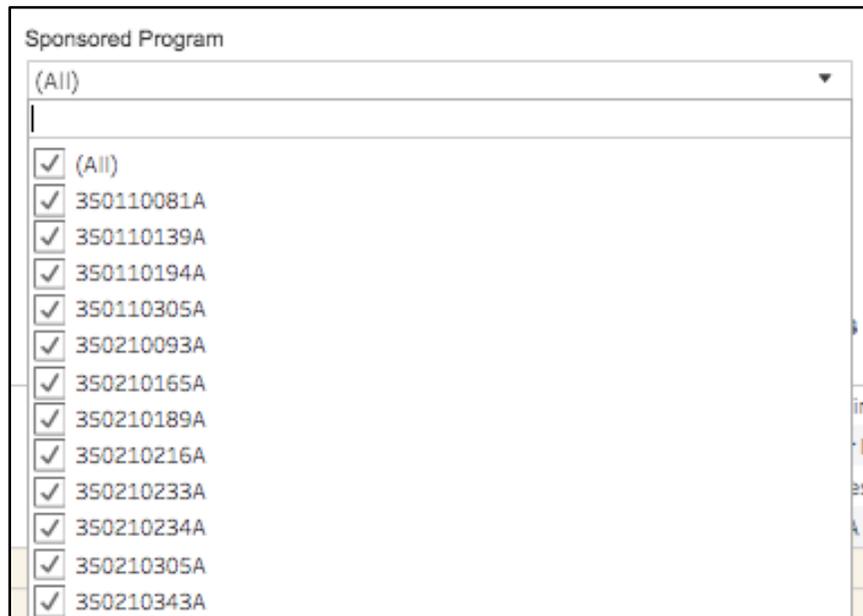


The screenshot shows a dropdown menu titled "Funds Center". The current selection is "(All)". Below the dropdown, a list of options is displayed, each with a checked checkbox:

- (All)
- CLPH
- HYDR

Sponsored Program

The Sponsored Program variable is a dropdown that will allow you to select multiple values. The default option is for all Sponsored Programs to be selected.

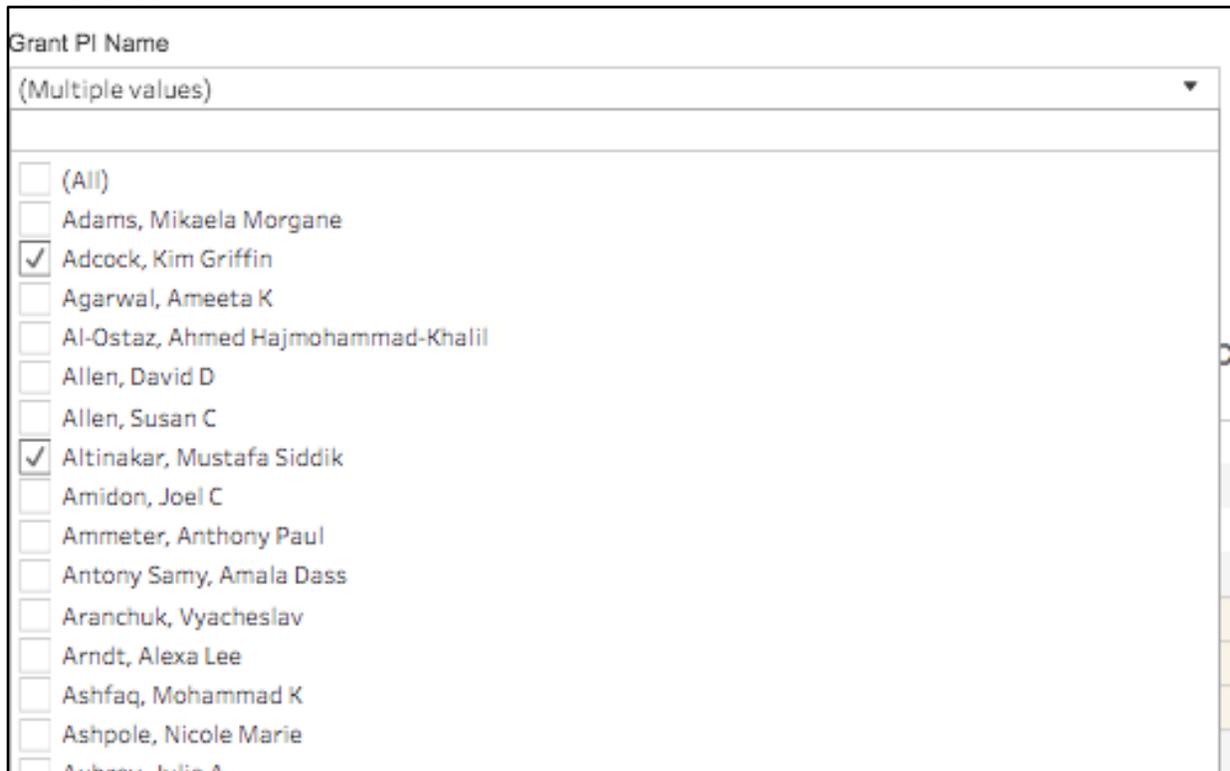


The screenshot shows a dropdown menu titled "Sponsored Program". The current selection is "(All)". Below the dropdown, a list of 14 items is displayed, each with a checked checkbox:

- (All)
- 350110081A
- 350110139A
- 350110194A
- 350110305A
- 350210093A
- 350210165A
- 350210189A
- 350210216A
- 350210233A
- 350210234A
- 350210305A
- 350210343A

Grant PI Name

The Grant PI variable is a dropdown that will allow you to select multiple values. The default option is for no PIs to be selected. In order to view any data in the report, you MUST select a PI from the list.

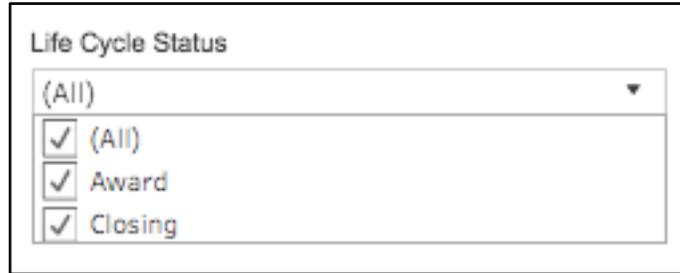


The screenshot shows a dropdown menu titled "Grant PI Name". The current selection is "(Multiple values)". Below the dropdown, a list of 20 names is displayed, each with a checkbox. Two checkboxes are checked:

- (All)
- Adams, Mikaela Morgane
- Adcock, Kim Griffin
- Agarwal, Ameeta K
- Al-Ostaz, Ahmed Hajmohammad-Khalil
- Allen, David D
- Allen, Susan C
- Altinakar, Mustafa Siddik
- Amidon, Joel C
- Ammeter, Anthony Paul
- Antony Samy, Amala Dass
- Aranchuk, Vyacheslav
- Arndt, Alexa Lee
- Ashfaq, Mohammad K
- Ashpole, Nicole Marie
- Aubrey, Julia A

Life Cycle Status

The Life Cycle Status variable is a dropdown that will allow you to select multiple values. The default option is for all life cycle statuses to be selected.



The screenshot shows a dropdown menu titled "Life Cycle Status". The selected option is "(All)". Below the dropdown, there is a list of three options, each with a checked checkbox: "(All)", "Award", and "Closing".

Changing Tab Views

The tabs available in the workbook are shown at the top left of your screen. In order to view the different data sets, you will simply click on the tab you want to view with the mouse.



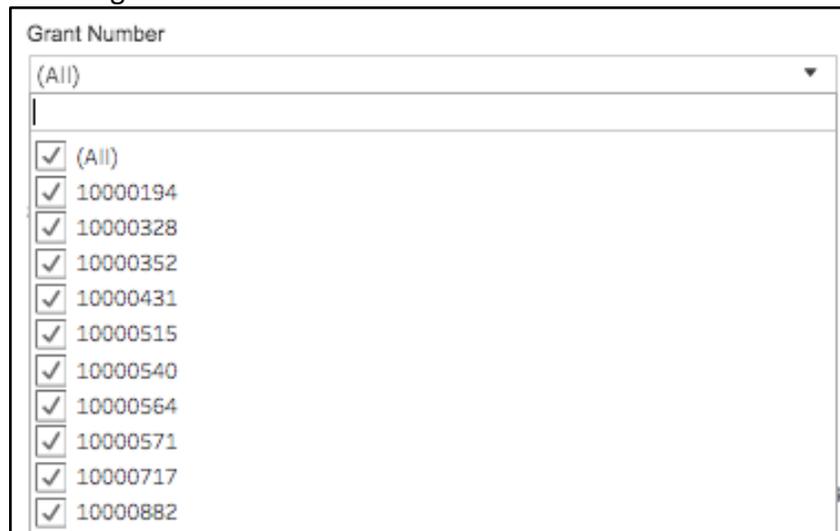
Grant Summary Tab



The screenshot shows a dropdown menu titled "Grant Number". The selected option is "(All)".

Grant Number

The Grant Number variable is a dropdown that will allow you to select multiple values. The default option is for all grants to be selected.



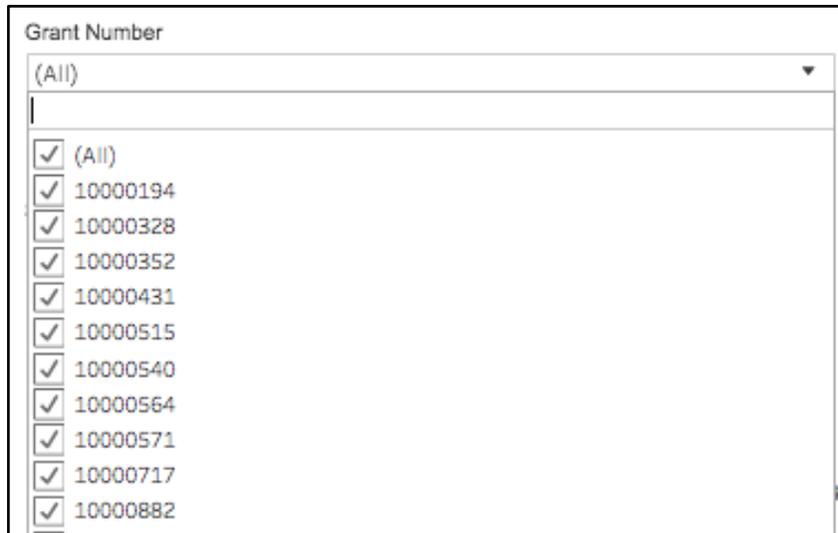
The screenshot shows a dropdown menu titled "Grant Number". The selected option is "(All)". Below the dropdown, there is a list of ten options, each with a checked checkbox: "(All)", "10000194", "10000328", "10000352", "10000431", "10000515", "10000540", "10000564", "10000571", "10000717", and "10000882".

Detailed Grant Expense/Commitments/Budget Report Tabs

Grant Number (All)	Sponsored Program (All)	Sponsored Class (Multiple values)
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Grant Number

The Grant Number variable is a dropdown that will allow you to select multiple values. The default option is for all grants to be selected.



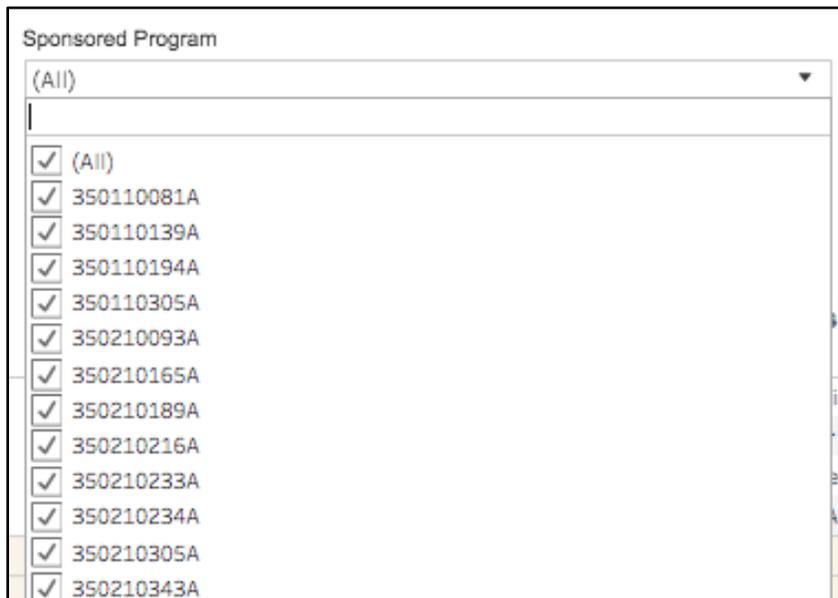
Grant Number

(All)

- (All)
- 10000194
- 10000328
- 10000352
- 10000431
- 10000515
- 10000540
- 10000564
- 10000571
- 10000717
- 10000882

Sponsored Program

The Sponsored Program variable is a dropdown that will allow you to select multiple values. The default option is for all Sponsored Programs to be selected.



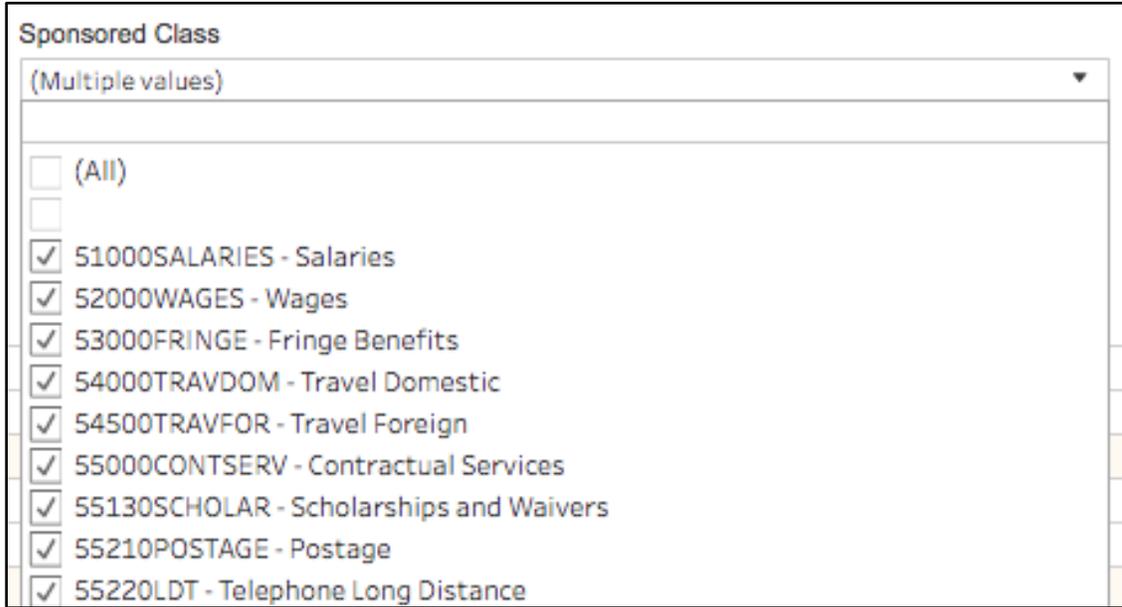
Sponsored Program

(All)

- (All)
- 350110081A
- 350110139A
- 350110194A
- 350110305A
- 350210093A
- 350210165A
- 350210189A
- 350210216A
- 350210233A
- 350210234A
- 350210305A
- 350210343A

Sponsored Class

The Sponsored Class variable is a dropdown that will allow you to select multiple values. The default option is for appropriate Sponsored Classes for that tab to be selected. (On the Expense and Commitment Tabs, you would *not* want to select 40000REV, 40009TFR, 47000AGENCYREV, 79000FAREC, or 80000UNALLOW)



The screenshot shows a dropdown menu titled "Sponsored Class". The current selection is "(Multiple values)". Below the dropdown, there is a list of options, each with a checkbox:

- (All)
- 51000SALARIES - Salaries
- 52000WAGES - Wages
- 53000FRINGE - Fringe Benefits
- 54000TRAVDOM - Travel Domestic
- 54500TRAVFOR - Travel Foreign
- 55000CONTSERV - Contractual Services
- 55130SCHOLAR - Scholarships and Waivers
- 55210POSTAGE - Postage
- 55220LDT - Telephone Long Distance

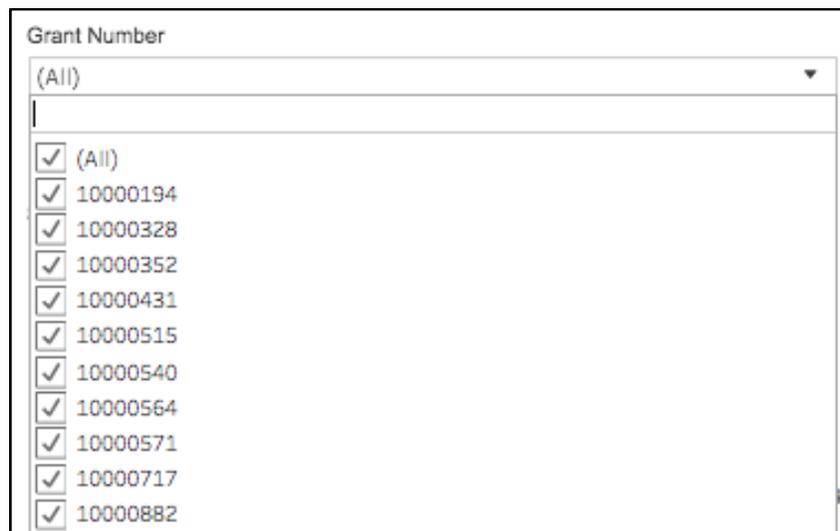
Payroll Details Tab



The screenshot shows two dropdown menus side-by-side. The first is labeled "Grant Number" and has "(All)" selected. The second is labeled "Sponsored Program" and also has "(All)" selected.

Grant Number

The Grant Number variable is a dropdown that will allow you to select multiple values. The default option is for all grants to be selected.

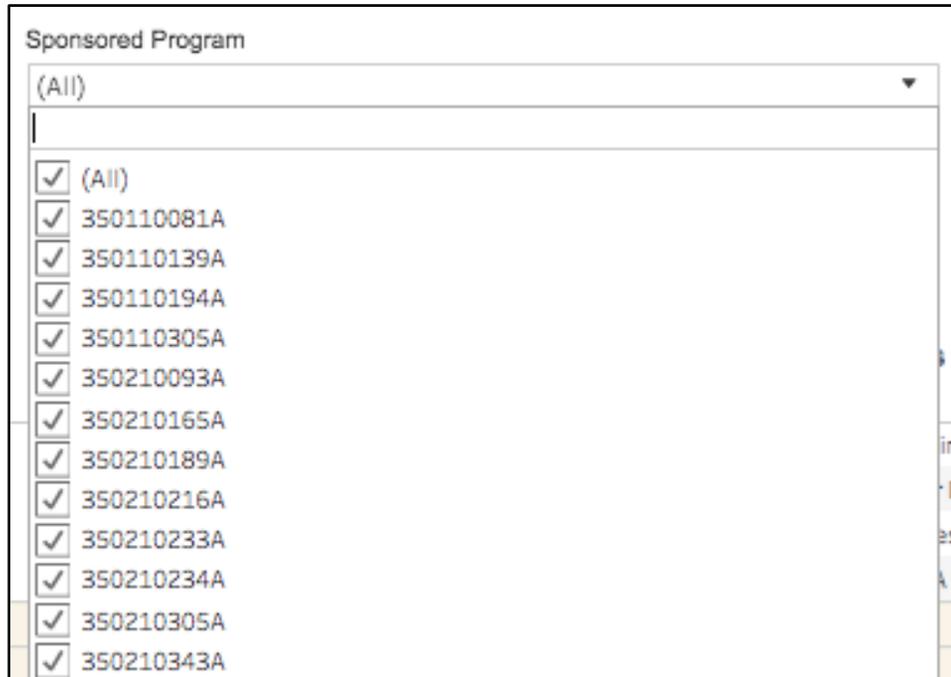


The screenshot shows a dropdown menu titled "Grant Number". The current selection is "(All)". Below the dropdown, there is a list of options, each with a checked checkbox:

- (All)
- 10000194
- 10000328
- 10000352
- 10000431
- 10000515
- 10000540
- 10000564
- 10000571
- 10000717
- 10000882

Sponsored Program

The Sponsored Program variable is a dropdown that will allow you to select multiple values. The default option is for all Sponsored Programs to be selected.



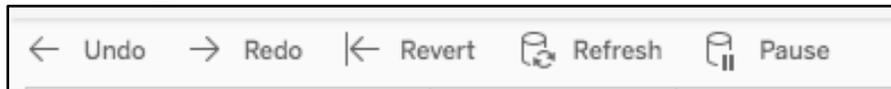
The image shows a screenshot of a web form element titled "Sponsored Program". It features a dropdown menu with a small downward arrow on the right side. The dropdown is currently open, displaying a list of 14 items. Each item has a small square checkbox to its left, and all of these checkboxes are checked with a black checkmark. The items in the list are: "(All)", "350110081A", "350110139A", "350110194A", "350110305A", "350210093A", "350210165A", "350210189A", "350210216A", "350210233A", "350210234A", "350210305A", and "350210343A".

Selected	Sponsored Program
<input checked="" type="checkbox"/>	(All)
<input checked="" type="checkbox"/>	350110081A
<input checked="" type="checkbox"/>	350110139A
<input checked="" type="checkbox"/>	350110194A
<input checked="" type="checkbox"/>	350110305A
<input checked="" type="checkbox"/>	350210093A
<input checked="" type="checkbox"/>	350210165A
<input checked="" type="checkbox"/>	350210189A
<input checked="" type="checkbox"/>	350210216A
<input checked="" type="checkbox"/>	350210233A
<input checked="" type="checkbox"/>	350210234A
<input checked="" type="checkbox"/>	350210305A
<input checked="" type="checkbox"/>	350210343A

Page Options

The Navigation Ribbon in the top left of your page will allow you to Undo / Redo any sorting or filters, refresh the data, or change how the report refreshes / updates.

Original View of the Navigation Ribbon



'Pause' changes to 'Resume' after choosing 'Pause'



Undo

The ← Undo button will remove your last edit (filter, sort, etc.)

Redo

The → Redo button will replace the last thing you used the Undo option for

Revert

|← Revert will remove all changes to the workbook and take you back to the original document.

NOTE: Using Revert from a Saved view will take you back to the original Saved View. (Setting up a Saved View is discussed in the “Saving and Sharing your View” section of this How To.)

Refresh

The Refresh button will refresh the data in the workbook – either with new data from the server, or if you have automatic updates Paused.

Pause

Choosing the Pause option will allow you to make several changes without the workbook refreshing. You can then hit Refresh or Resume to get the updated details. If you are adding several Accounts to the initial report, pausing the updates will speed up this process.

Resume

Choosing Resume will let the report refresh any time you make a change.

Context Menu

Clicking on an item in the details will allow the context menu to show. From this menu, you can do things like Filter, Sort, or export data.

Contractual Services	78,152.77	0.
Equipment	40,855.85	4,699.
Travel		
Total		
Fringe Benefits		
Salaries		
Wages	40,863.29	0.

✓ Keep Only ✕ Exclude   

4 items selected · SUM of Measure Values: 156,306

Contractual Services

Keep Only and Exclude



Choosing Keep Only will filter the data to only that particular item. Exclude will keep all values except the chosen item. This feature is useful for adding filters that are not available through variable options. The only way to remove these filters is to choose the Revert or Undo option at the top left of the page.

Sorting Values



The Sort options will sort based on the Sum of the Values of the selected group. This does not sort the selected data alphabetically.

View Data



The View Data option will create a pop up that shows you the details behind that specific section of data. This has the same functionality as the 'Download Data' option discussed in the Downloading and Printing Views Section of this How To document. The difference in the two options is that this option only downloads the highlighted data; whereas the page option downloads all data in that tab.

Sorting Alphabetically



In order to sort a column alphabetically, you will need to hover over the column heading and you will see a sort option pop up. Clicking this will sort the data in that column alphabetically.

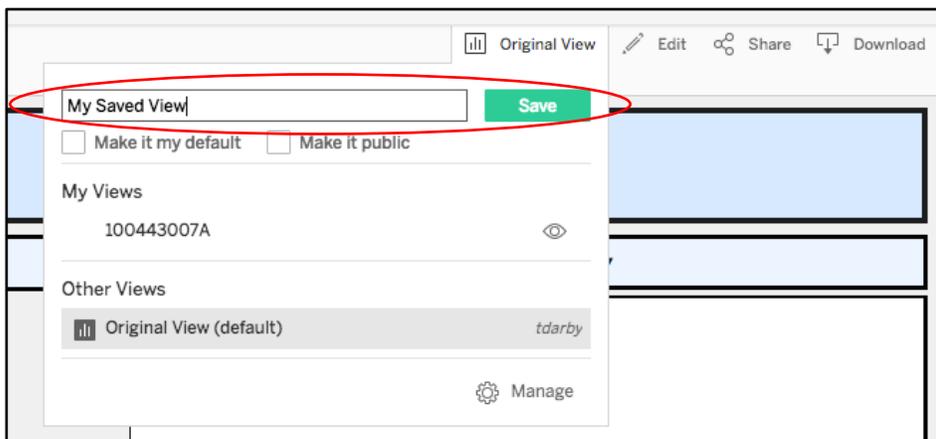


Saving and Sharing your View

If you manage multiple Accounts, you can create a view that will always have your account numbers saved. This way you do not have to enter the numbers every time you go to the report. You have the ability to save this view just for yourself, or to share the view with others that may need to see the same information.

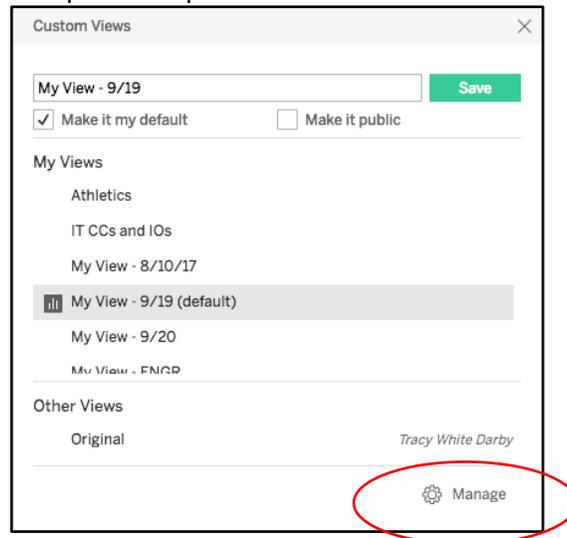
Creating a Personalized View

In the top right corner of your window, there is an image of a chart. If you click on this, you can enter a name, choose if you would like it to be your default view, and choose to make it public.



Managing Views

If you choose to Manage your view, you can Edit the name, Delete the view, or make it Public or Private. Choose the 'Manage' option at the bottom of the View menu and then you can choose to edit, delete, or make public vs private.



Public vs Private View

If your view is set to Public, then the view with your settings will be accessible for **all** users of the report.

If it is set to Public, there will be an eye visible next to the name of the report.

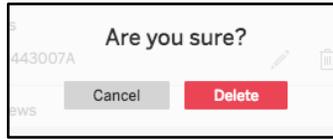


Deleting a View

If you decide that your saved view is no longer needed, you can delete the view by clicking on the trashcan icon.



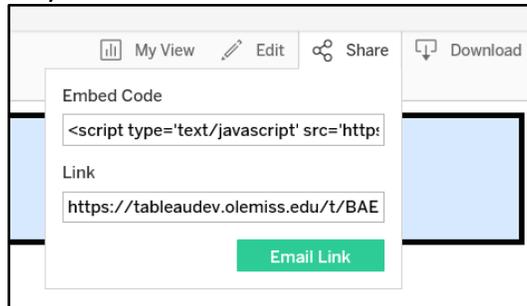
You will then be prompted if you are sure you want to delete.



Sharing a View

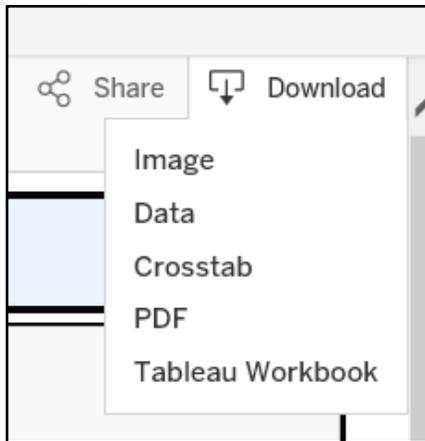
To share your saved view – you can click on Share in the top right of your screen. Here you will see Link and a button that will bring up your Outlook email.

NOTE: If you have a signature in your email, the link may be below your signature – you will need to move the link manually.



Downloading and Printing Views

Below are the options that will display when you choose 'Download'. Depending on the settings for that tab, some options may be grayed out.



Download Image

Download Image will give you just the image of what you currently see on your screen – if there is data not shown (due to needing to scroll) you will not get this information in the download.

Download Data

Download Data will create a pop up that gives you the option to download the Summary Data or the Full Data.

Summary Data

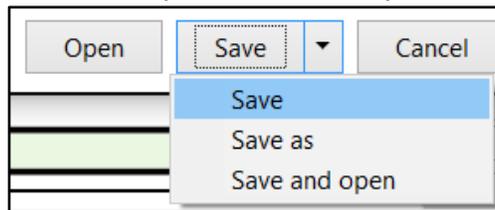


The Summary Data download will give you just the data shown in the report, not the details behind the data (i.e. – Document Number)

Clicking on 'Download all rows as text file' may prompt you to Open or Save the file depending on your browser version. It may not give you any prompt and just save the file to your Downloads folder.



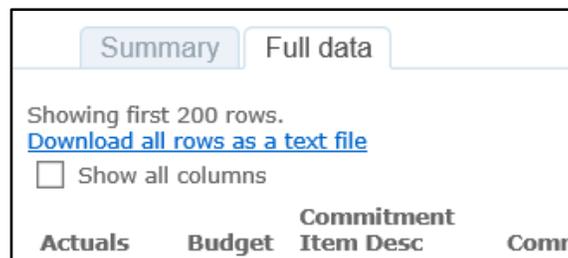
You can choose to save as, or save and open from the drop down on the Save option.



Opening the data (or saving and then opening) will open the file in Excel.

	A	B	C	D	E	F	G
1	Commitme	Profit Cent	Text	Trans Date	Type of Ch	Amount	
2	Equipment	10044300	Latitude 1	#####	Commitme	-1698	
3	Fringe Ben	10044300	Payroll for	#####	Actual	-10870.9	
4	Salaries	10044300	Payroll for	#####	Actual	24450.0	

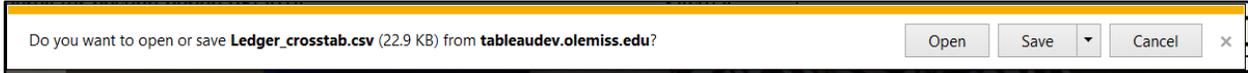
Full Data



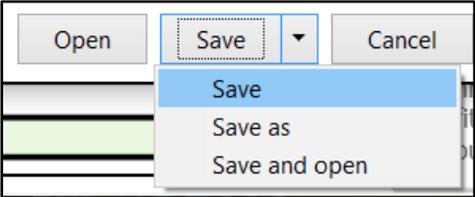
The Full Data download will give you the same options as the Summary Download, except you will be able to see all of the details behind the summary records. You can also choose to 'Show all columns' which will show you columns that are included in the data set, but not related to the current tab.

Download Crosstab

Download Crosstab exports the data as shown on the screen as a .csv file. This is very useful if you want to do filters or a Pivot Table in Excel. Choosing to Download Crosstab will give you the option to Open or Save.

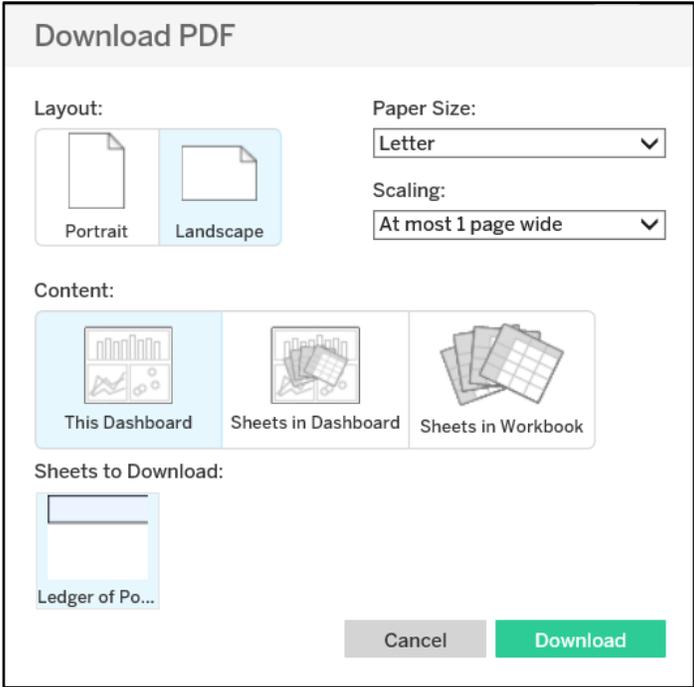


You can choose to save as, or save and open from the drop down on the Save option.



Download PDF

Download PDF is similar to Download Image except it allows you to download all sheets in the workbook at one time, specific sheets, or just the active sheet. You will only get what you see on the tab – you will not get any information that would need to be scrolled to see.



Download Tableau Workbook



Download Workbook will prompt you to Open or Save a copy of the workbook file. You will need the Tableau Desktop tools in order to open this file.

Note: This option may not be available for all users.