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
  Grant Summary for Department Tab ........................................................................... 3

Changing Tab Views ......................................................................................................... 7
  Grant Summary Tab ...................................................................................................... 7
  Detailed Grant Expense/Commitments/Budget Report Tabs ....................................... 8
  Payroll Details Tab ...................................................................................................... 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
    Public vs Private View ............................................................................................... 14
    Deleting a View ......................................................................................................... 14
    Sharing a View ........................................................................................................... 15
    Downloading and Printing Views .............................................................................. 15
  Download Image ........................................................................................................... 15
  Download Data ............................................................................................................. 16
    Summary Data ........................................................................................................... 16
    Full Data ................................................................................................................... 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 date 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 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.
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.

**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.)

**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.
**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 Dropdown](image)

**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.

![Grant PI Name Dropdown](image)
**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.

![Life Cycle Status](image)

**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.

<table>
<thead>
<tr>
<th>Grant Summary for Department</th>
<th>Grant Summary</th>
<th>Detailed Grant Expense Report</th>
<th>Detailed Grant Commitments</th>
<th>Detailed Grant Budget Report</th>
<th>Payroll Details</th>
</tr>
</thead>
</table>

**Grant Summary Tab**

![Grant Number](image)

**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](image)
Detailed Grant Expense/Commitments/Budget Report Tabs

<table>
<thead>
<tr>
<th>Grant Number</th>
<th>Sponsored Program</th>
<th>Sponsored Class</th>
</tr>
</thead>
<tbody>
<tr>
<td>(All)</td>
<td>(All)</td>
<td>(Multiple values)</td>
</tr>
</tbody>
</table>

**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.

**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 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)

![Sponsored Class Dropdown]

**Payroll Details Tab**

<table>
<thead>
<tr>
<th>Grant Number</th>
<th>Sponsored Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>All</td>
</tr>
</tbody>
</table>

**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 Dropdown]
**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.
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 \leftarrow Undo button will remove your last edit (filter, sort, etc.)

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

Revert
\leftarrow 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.

<table>
<thead>
<tr>
<th>Contractual Services</th>
<th>78,152.77</th>
<th>0</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equipment</td>
<td>✓ Keep Only</td>
<td>✗ Exclude</td>
</tr>
<tr>
<td>Travel</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>4 items selected • SUM of Measure Values: 156,306</td>
<td></td>
</tr>
<tr>
<td>Fringe Benefits</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salaries</td>
<td>Contractual Services</td>
<td></td>
</tr>
<tr>
<td>Wages</td>
<td>20,864.21</td>
<td>0</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Commitment Item Desc</th>
<th>Profit Center</th>
<th>Text</th>
<th>Trans Date</th>
<th>Type of Charge</th>
<th>AGG(Amount)</th>
</tr>
</thead>
</table>

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.

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

Do you want to open or save Budget Report.twb from tableaudev.olemiss.edu?

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.