Accessing New Proposal and Award Reports in Tableau

Link:
https://tableau.umsystem.edu/views/NewAwardsandProposals/NewProposalsbyWeek?:showAppBanner=false&:display_count=n&:showVizHome=n&:origin=viz_share_link

Important Note: When off campus, users must be signed on to the Virtual Private Network (VPN) to view reports on UM System's Tableau Server.
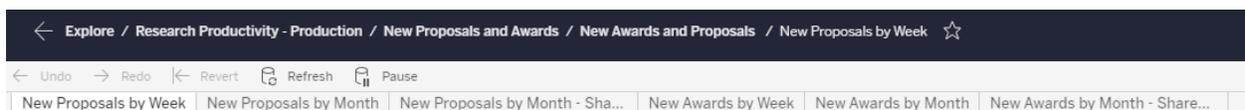
The purpose of these reports is to showcase recent efforts by investigators to secure external funding.

When prompted, enter your university credentials, including your domain name before your userID.

There are six reports available to view. You can use the tabs across the top of the screen to navigate among them.

New Proposals by Week: This report is based on the due date that is entered in the PeopleSoft Grants module. Using the filters at the right of the screen will allow you to choose proposals with a due date in the past day, week, month or year. Additional filters allow the search to be narrowed by the college submitting the proposal and the PI name. Proposals must be marked as "Submitted" in the PeopleSoft Grants Module in order to appear in this report.

New Proposals by Month: This report pulls the same data as the New Proposals by Week report, but covers a longer time frame. Use the filters to the right of your screen to select month and fiscal year. The report header will update to the month and fiscal year that you select. You may select multiple months, but only one fiscal year at a time. For example, if you want to view calendar year 2019 proposals, you must run the report twice: once for January-June FY19 and then for July-December FY20.

New Proposals by Month – Shared Credit: This report pulls the same data and employs the same filters as New Proposals by Month, but adds all investigators and their shared credit percentages as they appear in the PeopleSoft Grants Module.

New Awards by Week: This report is based on the date that the project budget is finalized in the PeopleSoft Grants module. Using the filters at the right of the screen will allow you to choose awards with a journal date in the past day, week, month or year. Additional filters allow the search to be narrowed by the college managing the award and the PI name. Only awards that are in their first budget period in PeopleSoft Grants Module appear on this report.

New Awards by Month: This report pulls the same data as the New Awards by Week report, but covers a longer time frame. Use the filters to the right of your screen to select month and fiscal year. The report header will update to the month and fiscal year that you select. You may select multiple months, but only one fiscal year at a time. For example, if you want to view calendar year 2019 awards, you must run the report twice: once for January-June FY19 and then for July-December FY20. An additional filter is added to this report to allow users to select the budget period.

New Awards by Month – Shared Credit: This report pulls the same data and employs the same filters as New Awards by Month, but adds all investigators and their shared credit percentages as they appear in the PeopleSoft Grants Module.

Downloading and Sharing Reports:

There are multiple options in the upper right hand corner of your screen. Share and Download are the most commonly used.

Share allows users to send others a link to the reports. The Share option will bring up the below pop up:
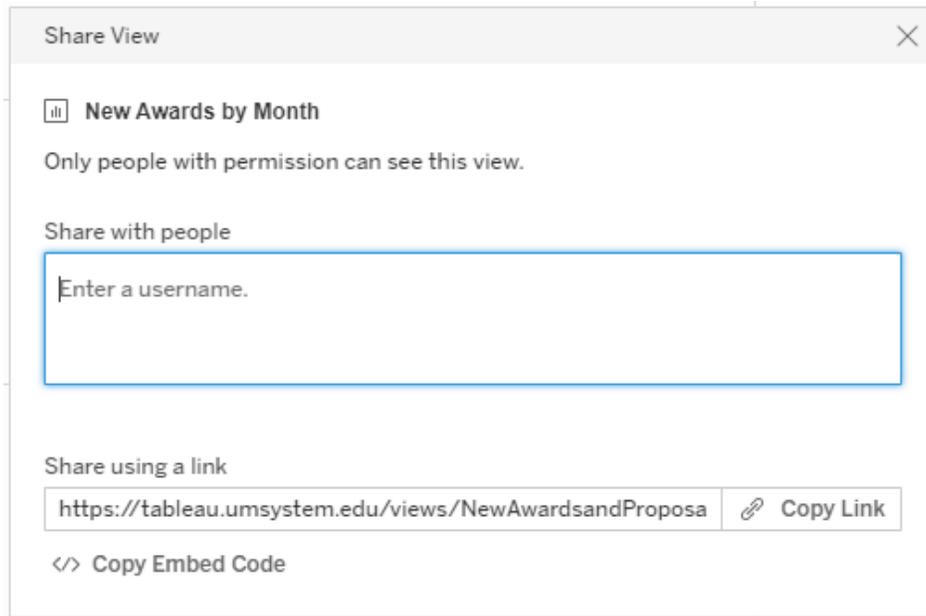
The pop up lets you know which report you're sharing, and gives you the option to copy the link for pasting to your communication, or send an email containing the link directly from Tableau Server. It's important to note that in order to view the report, the individual with whom the link is shared must have access to Tableau server. Most MU faculty and staff have access. If they do not have access, email mucompintel@missouri.edu to request access.

There are multiple format options for downloading the report. Crosstab downloads the data in Excel format, which allows for additional sort and filter options. The PDF option is the format that we have historically emailed to all faculty, chairs and deans. Either option allows users to email the report in an easy to read format, which will be helpful for users who don't have the ability to access Tableau Server.