Analytics Open Labs:
Introduction to Tableau at the University of Kentucky

1 pm - 3 pm
1st & 3rd Friday each month
Overview

- Introductions
- Tableau
  - Tableau Server
  - Tableau Desktop
- Resources on IRAA website
- One-on-one time
Who We Are/What We Do

- The IRAA team makes data available for reporting & analysis

Source Data

Data Warehouse

Integrated data from multiple sources

Reporting & Analysis

The IRAA team makes data available for reporting & analysis

Source Data

Faculty Database

Tagger

... Over a dozen other systems

Data Warehouse

SAP HANA

Reporting & Analysis

www.uky.edu/iraa

analytics.uky.edu
Our 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
Who Are You?

What Do You Do?
Tableau Products

- 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

- Tableau Desktop
  - Data visualization software used to create custom reports to meet analytical needs
  - Costs $1,200 + $300 annual maintenance
Access to Tableau Server

- Visit **Useful Links** at the bottom of our website to [request access](#).
- Area security officer and project owner(s) will sign off on access.
- IRAA will send an email once access has been granted.
Logging into Tableau Server

- Once you have been granted access, there are several ways to get to Tableau Server:
  - Visit analytics.uky.edu
  - Enter from the Interactive Fact Book on our website
  - Receive a direct link to a workbook
- Sign in using Linkblue credentials
  - Those in MC domain, pay attention to special instructions!
Tableau Server Structure

- **Projects** (aka folders) - collections of related reports that can be University wide or College/Business Unit specific
- **Workbooks** - custom-built reports created by IRAA team or Super Users
- **Views** (aka dashboards/worksheets) - tabs within the report containing data visualizations
What Projects Do You Have Access To?

- **Automatic access**
  - **User Resources** - reports related to HANA data elements (codebook), users in Tableau Server, Beginner Workbook, etc.
  - **Employee Reports Miscellaneous** - reports relating to miscellaneous employee information (E-mail generator, etc.)
  - **Research & Sponsored Projects** - reports that help monitor progress in research funding on sponsored projects and grants
  - **Research Data Portal** - reports that summarize research awards and expenditures

- **Request access (requires approval from Project Owner)**
  - Your College/Business Unit project(s)
  - Other projects
Searching in Tableau Server

- Search Bar at the top
  - Scans for search term(s) throughout all of Tableau Server
  - Returns related views, workbooks, data sources
Searching in Tableau Server

- Filter menu on right hand side
  - Must be toggled on
  - Scans within area you are in (ex. only searches in User Resources folder if that's where you are)
  - Offers more search criteria
    - Owner
    - Modified on/after
    - etc.
Navigating to a Report

1. Click on the name of the project folder containing the desired report

2. Click on the name of the report

3. Click on the name of any of the views to start exploring
Favoriting Workbooks

- Star a workbook that you visit often for quick access by clicking on the star icon to the left of it.
- View all starred workbooks using the star located at top right of navigation pane.
Interacting with a Tableau Workbook

- Advancing through tabs
  - Tabs represent different views in the workbook
  - Click on another tab to see that view of the data
  - Works just like an Excel workbook except tabs located at the top

*Visit reference guide on IRAA website to view animated examples*
Interacting with a Tableau Workbook

- Viewing tooltips
  - Hover over a data point in the visualization to see information in the tooltip
  - Generally contains same information in visualization, but possibly more

*Visit reference guide on IRAA website to view animated examples*
Interacting with a Tableau Workbook

- Highlighting data
  - Click on a data point (or ctrl + click multiple data points) to highlight
  - Can also click on names in legend
  - Remaining data points will be grayed out
  - Click any white space to return to normal

*Visit reference guide on IRAA website to view animated examples*
Interacting with a Tableau Workbook

- Using Filters
  - Utilize dropdowns and lists to drill down to a specific data set
  - Multiple filters can be used together
  - Filters will likely affect all visualizations in the view, unless otherwise noted

*Visit reference guide on IRAA website to view animated examples
Making A Personalized View

- Avoid repeatedly setting commonly used filters by making a view
- Set desired filters and click on View
- Name the view and select to make it your default - now filters will be set each time you open the workbook
- Note: this will not change others’ view of the workbook, and you can always return to original view
Downloading a Crosstab to Excel

- In the top right corner, select **Download** then **Crosstab**
- If **Crosstab** is grayed out, click anywhere on the data and try again (Tableau has to be “told” what to download)
- Select **Download** on the dialog box that appears to open the generated Excel file
Downloading an Image/PDF

- Great option for sharing visualizations for meetings, presentations
- In the top right corner, select Download then Image or PDF
- Follow instructions on dialog box then select Download
Sharing a Direct Link

- It is possible to share URL links of workbooks/views with others who have access to the same projects
  - Check for user access [here](https://analytics.uky.edu/#/workbooks/7181/views)
- Copy the browser URL when viewing a workbook or specific view to send to others
  - [https://analytics.uky.edu/#/workbooks/7181/views](https://analytics.uky.edu/#/workbooks/7181/views) - will link to a workbook
  - [https://analytics.uky.edu/#/views/OpenLabsBeginnerWorkbook_1/LineChart](https://analytics.uky.edu/#/views/OpenLabsBeginnerWorkbook_1/LineChart) - will link to a specific view, the Line Chart view
Receiving a Direct Link

- If someone has shared a link to a workbook or view with you, click the link to open the Tableau Server login screen.
- Once Linkblue credentials have been entered, the workbook or view will display.
- Note: you can navigate Tableau Server regularly from that point (go to other projects, etc.).
Want to Build Reports?

- Tableau Desktop allows users to build reports that can be shared on Tableau Server
- Connect up to 40+ data sources (SAP HANA, Excel, etc.)
- Create custom visualizations to interpret data
- License cost: $1,200, annual maintenance fee: $300
- Free **one-year license** for students & faculty!
- Free **14 day trial** for anyone
Resources on IRAA Website

- [www.uky.edu/iraa](http://www.uky.edu/iraa)
- Interactive Fact Book - publicly available data about the students, employees, and finances at the University
- Resources & Support -
  - General info for Tableau Server & Desktop
  - Troubleshooting tips
  - List of Super Users
Recommended Training Links

- Tableau-provided training videos on using Tableau Server
- Requires a sign in - but it’s free!
- For someone in a **viewer** role:
  1. [Getting started](#)
  2. [Interacting with Content](#)
One-on-One Time

- There are several IRAA team members around the room - feel free to ask questions and discuss why you are here/what you’d like to do with Tableau
- 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 - http://www.uky.edu/iraa/contact-us