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

- Faculty Database
- Tagger
- Over a dozen other systems

Data Warehouse

- Integrated data from multiple sources

Reporting & Analysis

- IRAA website: www.uky.edu/iraa
- University of Kentucky: 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 Navigation

- With the 2019 version of Tableau Server, users can utilize a new 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
- 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 Server Terminology

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** (all users receive)
  - User Resources - reports related to HANA data elements (codebook), users in Tableau Server, Beginner Workbook, etc.
  - Other projects - see a detailed list in [Tableau Server](#)

- **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, projects
Searching in Tableau Server

- Filter menu on right hand side
  - Must be toggled on
  - Scans within area you are in (i.e. only searches in User Resources folder if that's where you are)
  - Offers more search criteria
    - Owner
    - Modified on/after
    - etc.
Favoriting Workbooks or Views

- 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.
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*
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 personalized 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](#)
- 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/iraq
- 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