Tableau Server User Guide

For University of San Francisco Staff

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1. **Linking Tableau to myUSF**
   Once you reach the dashboard of myUSF, click on “Fav Apps” in the upper left hand corner and then select “Preferences” at the bottom of the drilldown.

   Select the “All Apps” tab to the right of “My Favorite Apps” and then scroll down until Tableau shows up in the title section. Select the star to the left of Tableau and it will go from an empty star into a filled star denoting that it has been added to your favorites.

   In the future, you can then access the Tableau server from your myUSF dashboard by simply hitting “Fav Apps.”

2. **Tableau Server Interface**
   When you first log into Tableau your dashboard will look like this. It shows all the ongoing projects you have access too. Since I am a student, I only have access to “CIPE-Student.”
You will have a toolbar on the upper left corner where you can access “Projects”, “Workbooks”, “Views”, and “Data Sources.” Click into a project and you will be able to see all the ongoing workbooks within that project.

Each workbook contains several display sheets known as “Views”. The “Workbooks” tab contains all the workbooks which each contain several “views” inside. It is similar to how an Excel workbook is arranged. The “Views” section contains all sheets as individual displays separate from its workbook for you to access. For our purposes, we will focus on the “Workbooks” tab.

3. Viewing Workbooks and Worksheets

Select the “Workbooks” tab and you will see the thumbnails of workbooks available for viewing.

![Image of workbooks in Tableau]

If you know the author or the name of your workbook you can search for it in the “General Filters” search section on the left column of your dashboard.

When you hover over a workbook, a data table will show up listing the name of the project, the owner of the workbook, and the last time the workbook was updated. From the image below, you can see that the project was “CIPE” and it was last updated by Joe Henson on May 19 th, 2015 and 2:25PM.
Once you click into the workbook, you can see that there are 15 views. They are arranged in a thumbnail display format for you to click through.

When you click into a view you can also switch between different views by clicking on their names in the tabs near the top of the view.

### 4. Setting Your Start Page

Let us say that you have a particular view or workbook you constantly check up on because information on it is updated regularly. Instead of navigating through your workbooks and sifting through views, you can set a specific view or workbook as your homepage by clicking your name on the
upper right corner and selecting “Make This My Start Page.” Now the view or workbook you selected will be the first thing you see on your dashboard when you access the Tableau server in the future.

To restore your start page, hit the Tableau logo in the upper left hand corner and set it as your start page. You can also navigate to a different workbook or view and set that as your new start page by repeating the steps mentioned above.

5. Adding to Your Favorites
If you have multiple views which you follow up on regularly, you can manage them in your favorites section. Select the empty star next to the name of your view on your path directory to add it to your favorites. To view and manage the favorites you have selected, click on the grey star on the top of your dashboard.

6. Subscribing to Workbooks and Views
Suppose you want to get a rundown of your favorite workbooks and views every morning without the hassle of logging into Tableau. To do this, you can choose to subscribe to workbooks of your choice and have updates sent directly to your email.

To do this, enter a view within a workbook and select the little mail logo on the top right corner.
When the mailbox is selected a box will pop-up which lets you customize your subscription settings. The first row lets you set which email you prefer the updates to be sent to. The second row lets you choose the subject of your update. The third row lets you choose when and how often the updates are sent. The fourth row lets you subscribe to updates for the whole workbook or just specific views within the workbook.

7. Managing Subscriptions

To manage your subscriptions from the emails, scroll to the bottom of the email update you received and select “manage my subscription settings.”

Or you can select the drill down next to your name on the Tableau server and select “My Content.”

They will both take you to the same page and allow you to select “Subscriptions.” From there, you check the box next to which summary dashboard you would like to subscribe from then select the drill down for “Actions” which will allow you to change how often emails are sent or change the subject title of the email. Selecting “Delete” will unsubscribe you from the updates; don’t worry, it will not delete the workbook from Tableau.
You can also customize how often you would like to receive email updates about workbooks and views you have subscribed to in the “Subscriptions” area or when you first sign up for a subscription.

8. Viewing and Selecting Data

When you hover over a piece of data, a small data table will pop up and provide a rundown of the data regardless whether the data is in a crosstab or a chart.

Some views are interactive and allow you to change and adjust datasets according to different factors. For this view, I changed the total headcount to include only degree-seeking students in the College of Arts and Sciences by adjusting the checkmarks in the box.
In a Tableau view, you are able to view a specific record for a piece of data by clicking on the data and then clicking on the crosstab logo when the data table pops up. The record will then open in a separate window for you to view.

The mini-toolbar at the top of your Tableau view allows you to customize your settings for that view. The first logo is the export icon which I will go over in the next section. For now we will focus on the last 3. The logo with the arrow going counter clockwise reverts your data. The power button will pause
updates to that view. The last button checks for any updates to the Tableau view and refreshes it to the latest time it was modified.

9. **Exporting Workbooks and Views**

To export your view into a dataset, select the first icon which will give you 4 export options. The first option exports your view into a still image as-is. This is ideal for PowerPoint presentations and reports.

![Export options](image)

The second option, “Data”, allows you to download the entire dataset that is used. A new window will pop up with two tabs, “Summary” and “Underlying.” The “Summary” window only shows the data that is immediately being used and displayed onto the current Tableau view. Select the “Underlying” tab to view the expanded dataset.

**Summary compared to underlying**
To view the full and expanded data set used, select “Show all columns.”
When you are ready to download the dataset, select “Download all rows as a text file.” It will be downloaded onto your computer as a comma separated file or a “.csv” file.

The third export option is the “crosstab” option which will download the immediate data in your view as a crosstab. The fourth and final option is the “PDF” option which will export the view into a portable document format.

10. Saving and Sharing Workbooks and Views
Say you have a favorite workbook and only want to focus on viewing a specific customized view. You can do this by hitting “Remember My Changes” in the upper left hand corner. So you only want to see high schools in California for my custom view instead of the entire United States. Customize your options on the side by selecting “CA” under state and then hit “Remember My Changes”, name your custom view, and then select “Remember.”
To share this view with other people, select the drill down next to “Original View” and select the title of the customized view you have created. Then select “Share” to the left of the drill down menu. From there you can customize display options, toolbar options, and method of sharing.

11. Using Tableau Maps and Exporting Map Data
   A lot of times you will encounter geographical data in a view. For this example, I am using the “Location Check” view. The blue dots in the map below represent all high schools in the United States.
On Tableau Maps, there is usually some sort of selection bar or parameter that allows you to filter out the data. In this map, there is a selection bar which lets you narrow down each school by state. So let us click on “CA” or California and it will filter out only the schools in California.

Now we only have the schools in California however, we are too far away to see anything of use. To zoom in on Tableau Maps, hover over the left side of the view and a toolbar will show up allowing you to zoom in and out. The faster way would be to hold down Ctrl + Shift and then click and drag over the area you want to see. To zoom in on California, we will use the first method below.
To see the schools in the Bay Area only, we will use the second method shown below. These two can be used interchangeably and are determined by user preference. Some maps will be more advance and will let you filter to see different districts and some maps are more general and only let you filter by country.

Say you want to export a data set containing only information about schools in San Francisco. Let’s use one of the zoom in methods above to see San Francisco only. Hover over the toolbar and select the drill down at the bottom. Different selection tools will show up. They all do the same thing and select data. One is a square selection for detailed organized plots, one is a freeform tool for different geographical boundaries, and one is a circular tool for round geographical boundaries.
Use the square selection tool for this purpose but most of the selection tool will get the same job done. A lot of Tableau is up to ones’ personal choice.

Notice how the selected schools in San Francisco are now highlighted. Right click on any of the dots and you will see a crosstab giving a small summary of the data and it gives you the option to “Exclude All” or “Keep Only”. “Exclude All” will exclude all of the selected schools so when you export your dataset, all schools in California will be listed except the ones in San Francisco. “Keep Only” is the opposite and will preserve only the selected schools so when you export your dataset, only schools within the boundaries of San Francisco will be listed. “Keep Only” is the one we want to use in this example.
Your dataset is now ready for extraction. Export the dataset using the toolbar at the top according to the data exporting methods you have learned above. As you can see below, only schools located in San Francisco are listed in the dataset.

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<th>Institution</th>
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<th>Latitude</th>
<th>Longitude</th>
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