



# Tableau Server User Guide

For University of San Francisco Staff

Prepared by David Hu

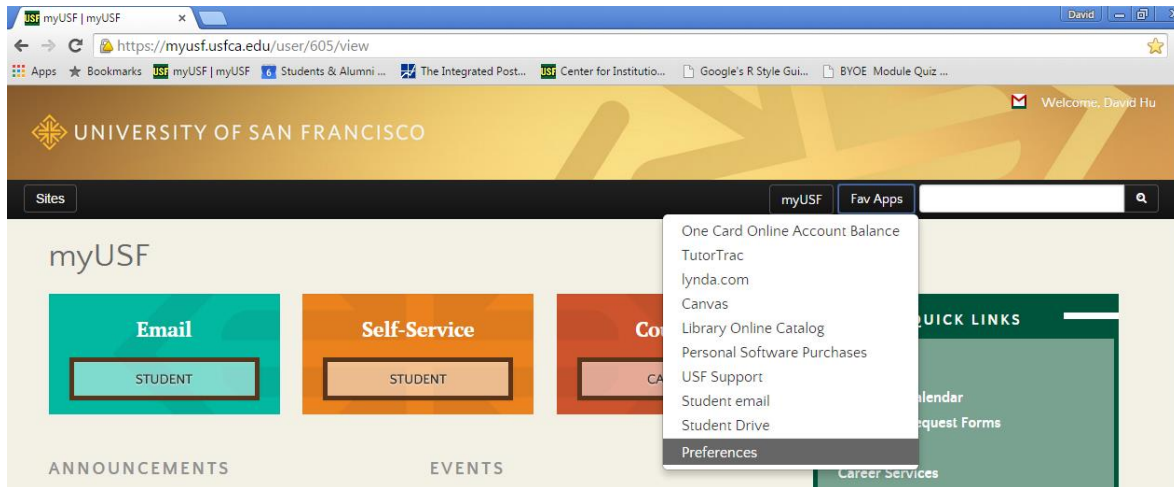
Office of Institutional Analytics

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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.

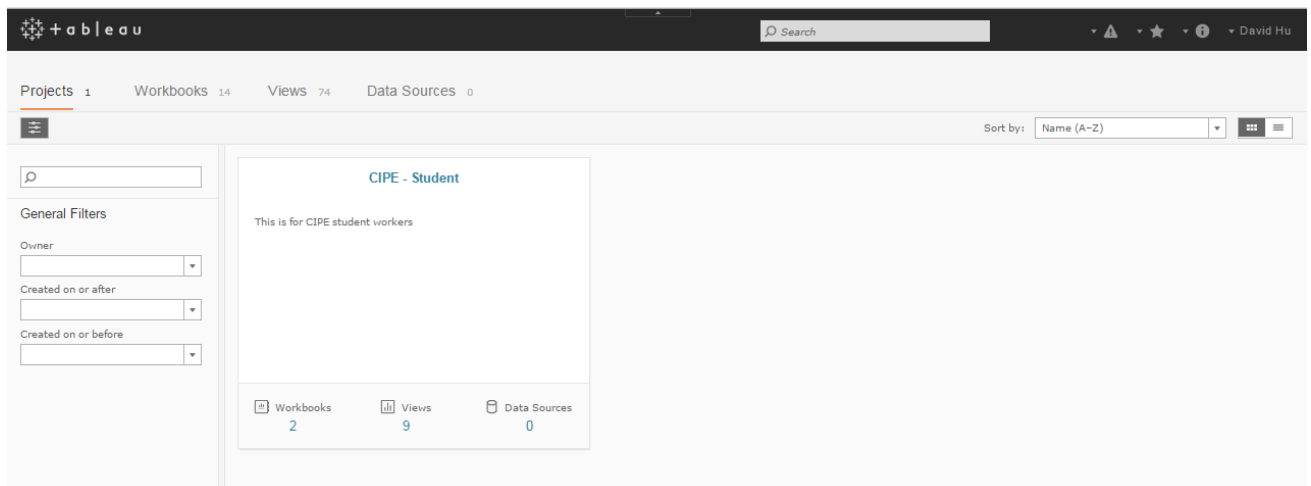


Select the “All Apps” tab to the right of “My Favorite Apps” and then scroll down until Tableau shows up in the title section. Select the star to the left of Tableau and it will go from an empty star into a filled star denoting that it has been added to your favorites.

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.”

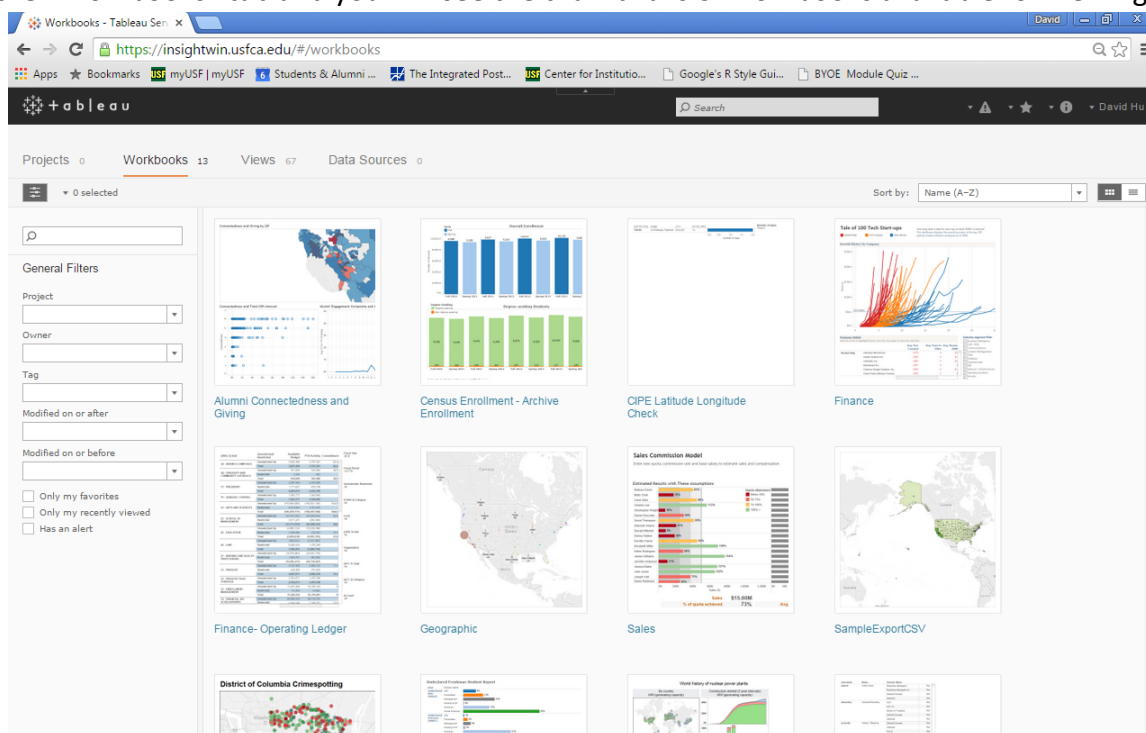


You will have a toolbar on the upper left corner where you can access “Projects”, “Workbooks”, “Views”, and “Data Sources.” Click into a project and you will be able to see all the ongoing workbooks within that project.

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.

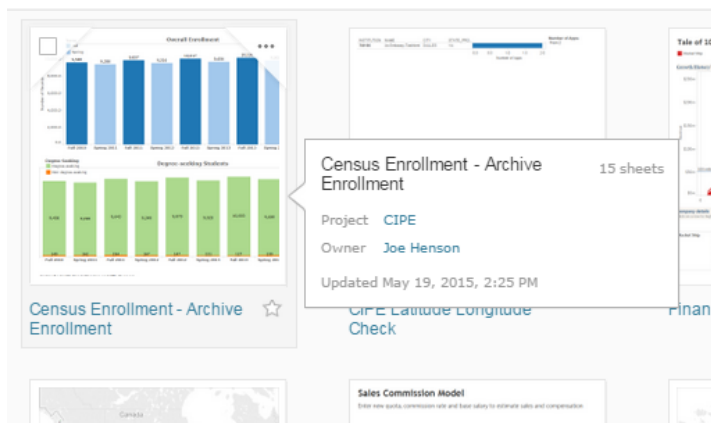
### 3. Viewing Workbooks and Worksheets

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

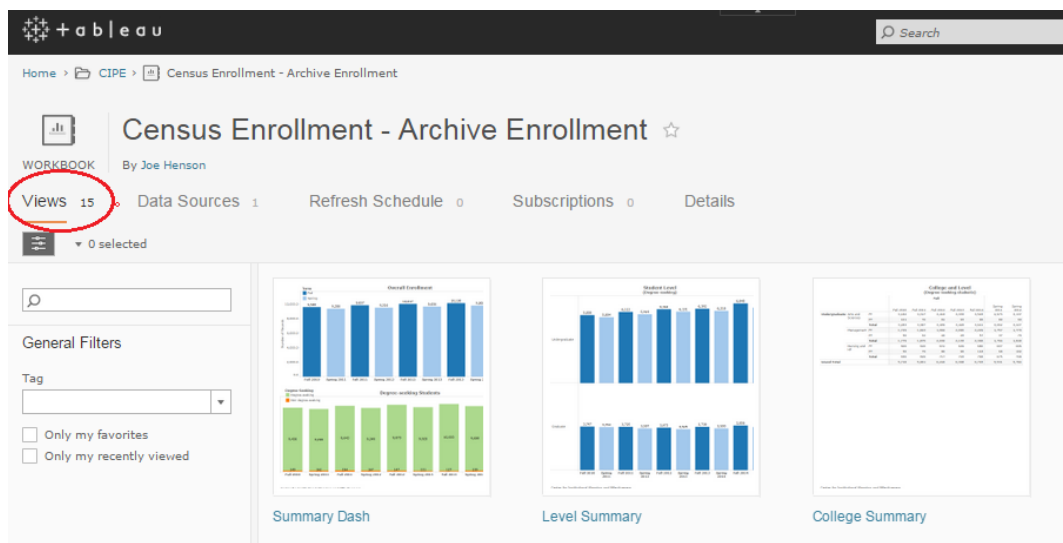


If you know the author or the name of your workbook you can search for it in the “General Filters” search section on the left column of your dashboard.

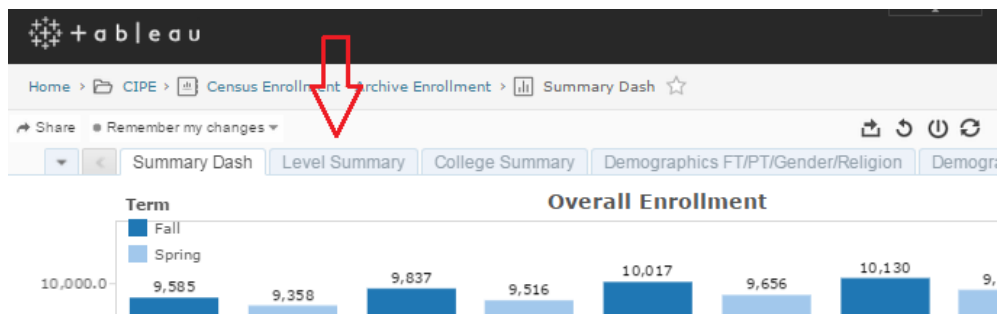
When you hover over a workbook, a data table will show up listing the name of the project, the owner of the workbook, and the last time the workbook was updated. From the image below, you can see that the project was “CIPE” and it was last updated by Joe Henson on May 19<sup>th</sup>, 2015 and 2:25PM.



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.



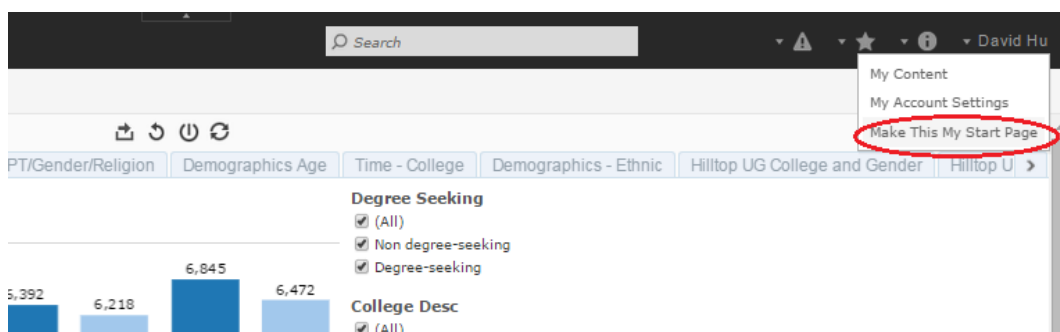
When you click into a view you can also switch between different views by clicking on their names in the tabs near the top of the view



#### 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

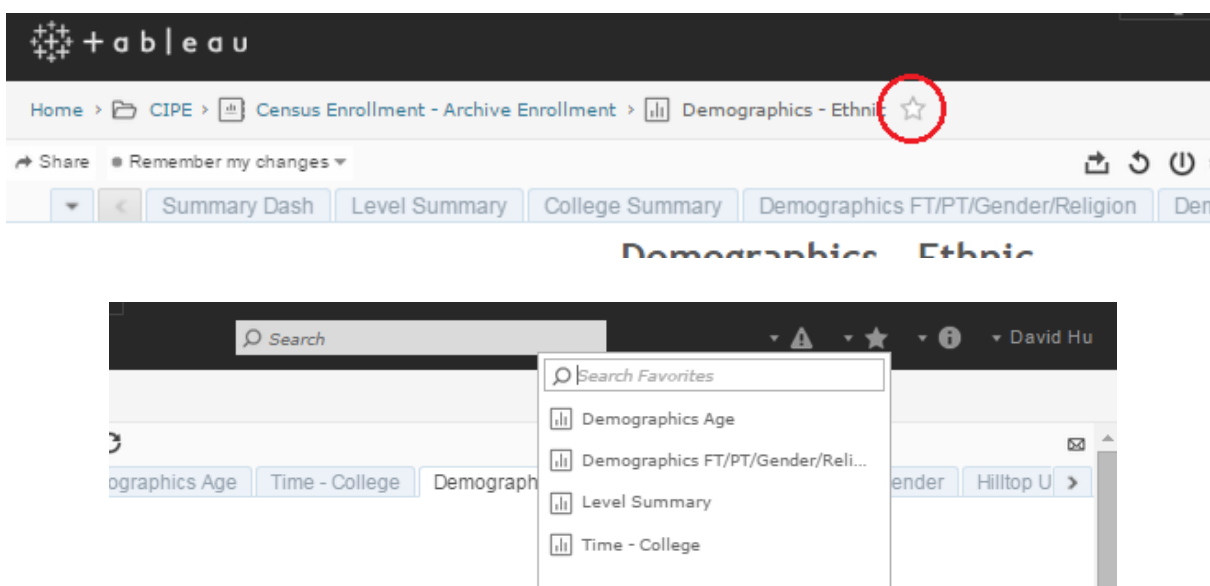
upper right corner and selecting “Make This My Start Page.” Now the view or workbook you selected will be the first thing you see on your dashboard when you access the Tableau server in the future.



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

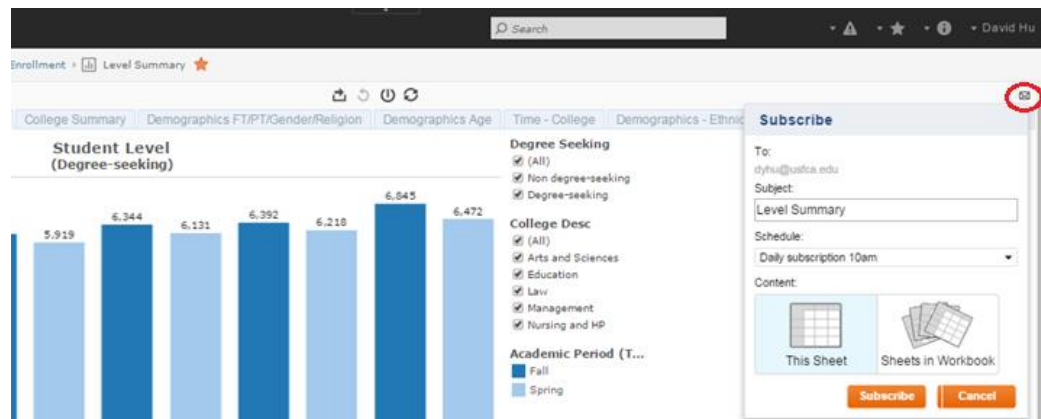
If you have multiple views which you follow up on regularly, you can manage them in your favorites section. Select the empty star next to the name of your view on your path directory to add it to your favorites. To view and manage the favorites you have selected, click on the grey star on the top of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

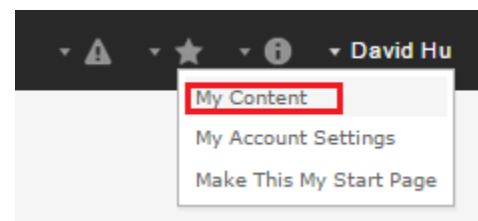
## 7. Managing Subscriptions

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.”

Spring	2015	320.0	26.0	1.0	3.0	2.0	14.0
	2014	299.0	34.0				1.0 18.0
	2013	321.0	36.0		2.0		2.0 10.0
	2012	319.0	25.0				1.0 3.0
	2011	363.0	47.0		5.0		11.0

[Manage my subscription settings](#)



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.

David Hu

USER

local\dyhu

Site role: Interactor

Last sign in: Jul 9, 2015, 10:13 AM

dyhu@usfca.edu

Workbooks0

Views0

Data Sources0

Subscriptions1

Settings

▼ 1 selected

2.▼ Actions

Workbook /

Change Schedule

Change Subject

1.✓ Census

Delete

↑ Subject

Schedule

ent \*\*\* Summary Dash

Daily subscription 10am – Daily at 10:00 AM

Last update

Jul 9, 2015, 10:02 AM

Next update

Jul 10, 2015, 10:00 AM

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.

Workbooks	Views	Data Sources	Subscriptions	Settings
0	0	0	2	
▼ 0 selected				
Workbook / View	Subject	Schedule	Last update	Next update
<input type="checkbox"/> Location Check	Location Check	Daily subscription 10am – Daily at 10:00 AM	Never	Aug 5, 2015, 10:00 AM
<input type="checkbox"/> Missing Latitude Longitude	Missing Latitude Longitude	Daily subscription 10am – Daily at 10:00 AM	Never	Aug 5, 2015, 10:00 AM

Subscribe

To: dyhu@usfca.edu

Subject: Location Check

Schedule: Daily subscription 10am

Daily subscription 10am

Monday morning

Test - 15 Minutes

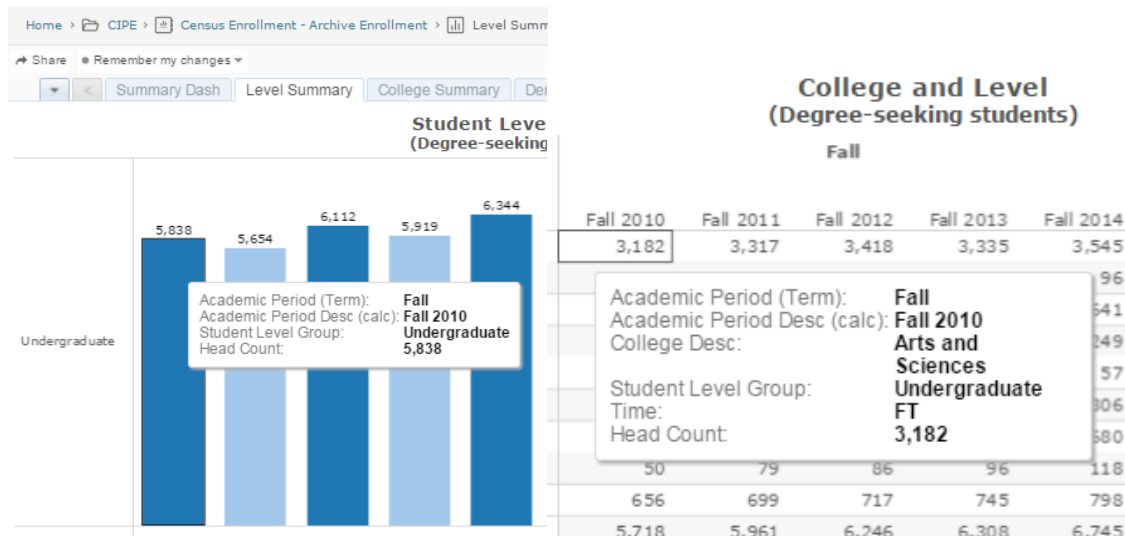
Weekday mornings

Weekdays at 9 a.m.

Subscribe Cancel

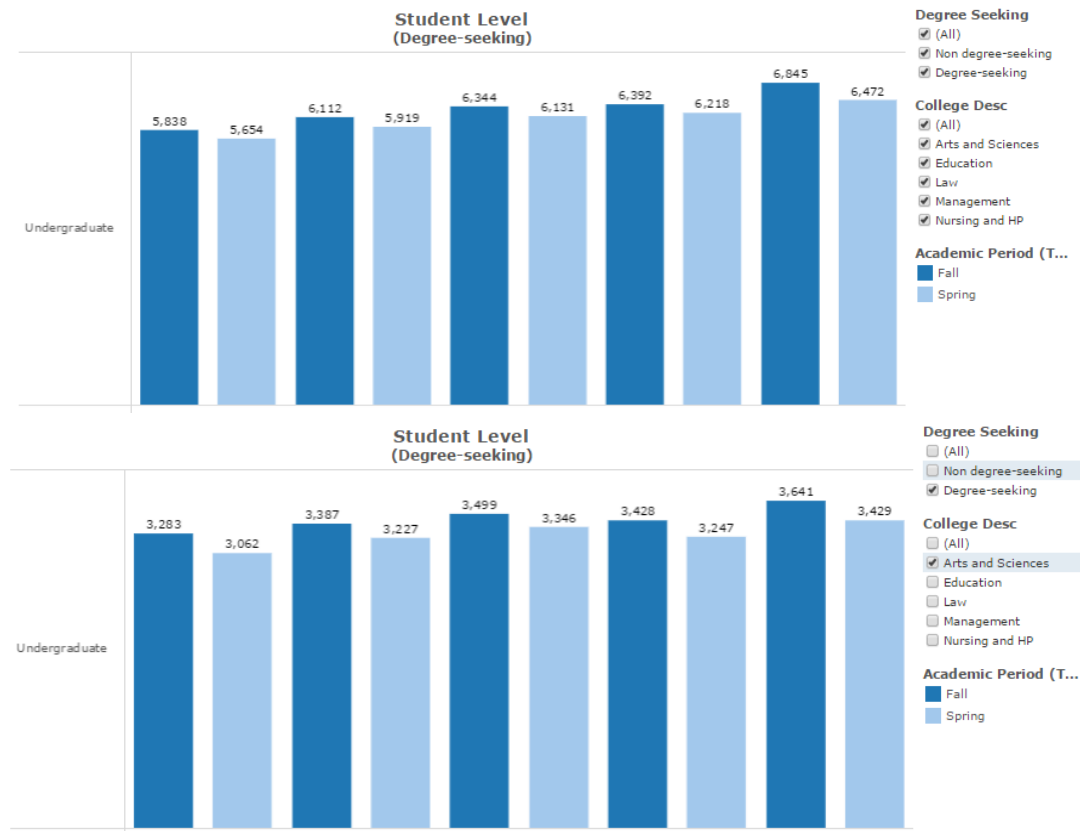
## 8. Viewing and Selecting Data

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.

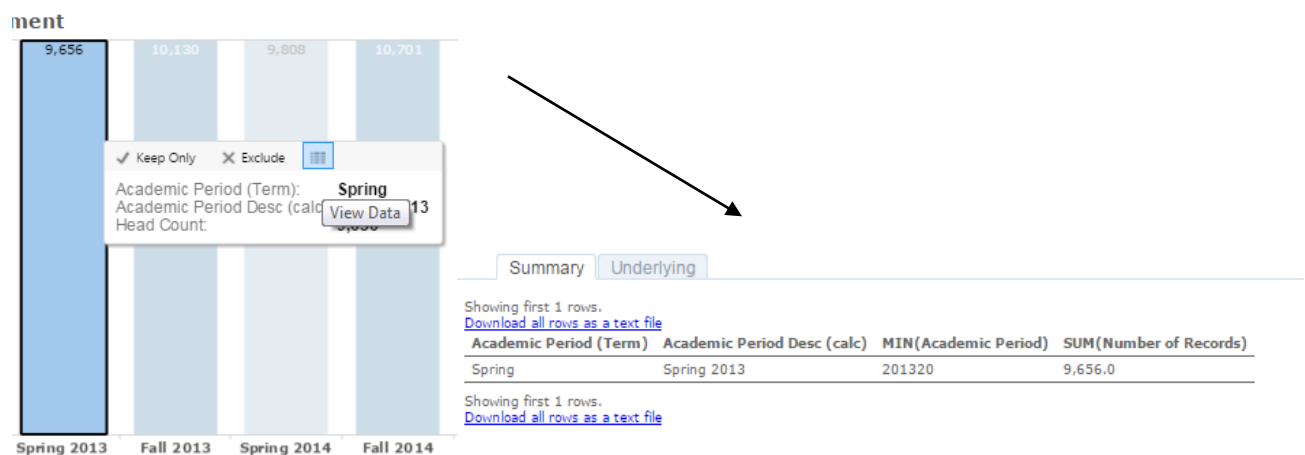


Some views are interactive and allow you to change and adjust datasets according to different factors. For this view, I changed the total headcount to include only degree-seeking students in the College of Arts and Sciences by adjusting the checkmarks in the box.



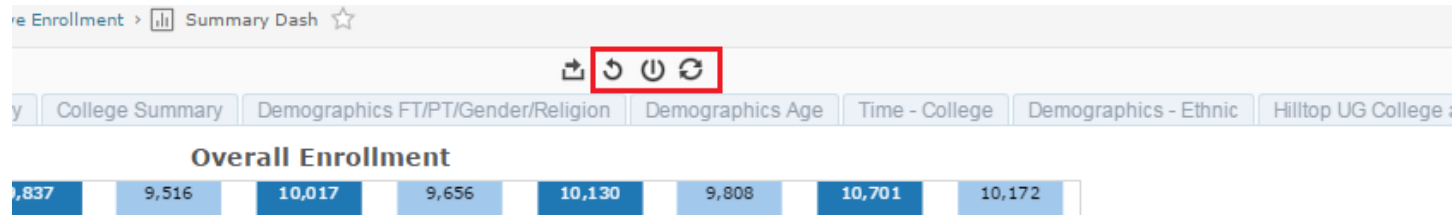


In a Tableau view, you are able to view a specific record for a piece of data by clicking on the data and then clicking on the crosstab logo when the data table pops up. The record will then open in a separate window for you to view.



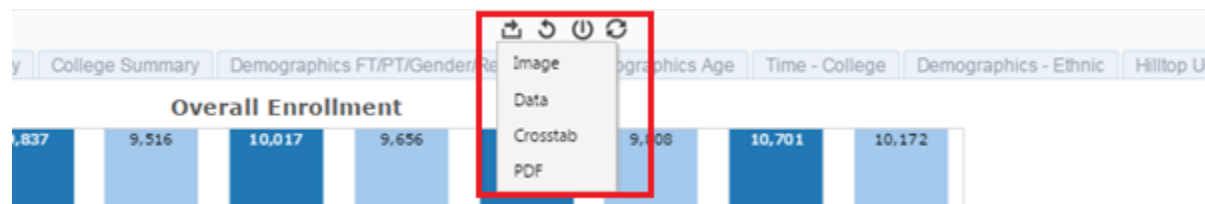
The mini-toolbar at the top of your Tableau view allows you to customize your settings for that view. The first logo is the export icon which I will go over in the next section. For now we will focus on the last 3. The logo with the arrow going counter clockwise reverts your data. The power button will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



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



View Data - Google Chrome

<https://insightwin.usfca.edu/vizql/w/CensusEnrollment-ArchiveEnrollment/v/>

Summary Underlying

Showing first 10 rows.  
[Download all rows as a text file](#)

Academic Period (Term)	Academic Period Desc (calc)	MIN(Academic Period)	SUM(Number of Records)
Spring	Spring 2015	201520	10,172.0
Spring	Spring 2014	201420	9,808.0
Spring	Spring 2013	201320	9,656.0
Spring	Spring 2012	201220	9,516.0
Spring	Spring 2011	201120	9,358.0
Fall	Fall 2014	201440	10,701.0
Fall	Fall 2013	201340	10,130.0
Fall	Fall 2012	201240	10,017.0
Fall	Fall 2011	201140	9,837.0
Fall	Fall 2010	201040	9,585.0

Showing first 10 rows.  
[Download all rows as a text file](#)

View Data - Google Chrome

<https://insightwin.usfca.edu/vizql/w/CensusEnrollment-ArchiveEnrollment/v/>

Summary Underlying

Showing first 200 rows.  
[Download all rows as a text file](#)

☐ Show all columns

Academic Period	College Desc	Academic Period (Term)	Academic Period Desc (calc)	Degree Seeking
201040	Education	Fall	Fall 2010	Degree-seeking
201240	Management	Fall	Fall 2012	Non degree-seek
201120	Education	Spring	Spring 2011	Degree-seeking
201220	Education	Spring	Spring 2012	Degree-seeking
201120	Arts and Sciences	Spring	Spring 2011	Non degree-seek
201120	Arts and Sciences	Spring	Spring 2011	Non degree-seek
201120	Arts and Sciences	Spring	Spring 2011	Non degree-seek
201120	Arts and Sciences	Spring	Spring 2011	Non degree-seek
201220	Management	Spring	Spring 2012	Non degree-seek
201040	Management	Fall	Fall 2010	Degree-seeking
201040	Management	Fall	Fall 2010	Degree-seeking
201040	Management	Fall	Fall 2010	Degree-seeking
201120	Management	Spring	Spring 2011	Degree-seeking
201120	Management	Spring	Spring 2011	Degree-seeking
201040	Education	Fall	Fall 2010	Degree-seeking
201140	Education	Fall	Fall 2011	Degree-seeking
201120	Education	Spring	Spring 2011	Degree-seeking

To view the full and expanded data set used, select “Show all columns.”

Summary Underlying

Showing first 200 rows.  
[Download all rows as a text file](#)  
☒ Show all columns

Academic Period	AGE	Age Range	Athlete Ind	Athlete Sport	Athlete Sport Second	Attempt Hours	Birth Date	Block Schedule	Campus Code	Campus Desc	Campus Primary Courses	Category	Category Desc	Census Ind	Citizenship Type	Citizenship Type Desc	Class	Class Desc
201040	Null	unsp	0	Null	Null	3	Null	Null	M	Hilltop	Null	Null	Masters	Null	Y	Citizen	GM	Graduate (Masters)
201240	Null	unsp	0	Null	Null	5	Null	Null	M	Hilltop	Null	e_other	Bachelors	Null	Y	Citizen	FR	Freshman
201120	Null	unsp	0	Null	Null	3	Null	Null	M	Hilltop	Null	b_master	Masters	Null	Y	Citizen	GM	Graduate (Masters)
201220	Null	unsp	0	Null	Null	3	Null	Null	M	Hilltop	Null	b_master	Masters	Null	Y	Citizen	GM	Graduate (Masters)
201120	Null	unsp	0	Null	Null	4	Null	Null	M	Hilltop	Null	e_other	Bachelors	Null	Null	Null	FR	Freshman
201120	Null	unsp	0	Null	Null	4	Null	Null	M	Hilltop	Null	e_other	Bachelors	Null	Null	Null	FR	Freshman
201120	Null	unsp	0	Null	Null	4	Null	Null	M	Hilltop	Null	e_other	Bachelors	Null	Null	Null	FR	Freshman

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.

<https://insightwin.usfca.edu/vizql/w/>

Summary Underlying

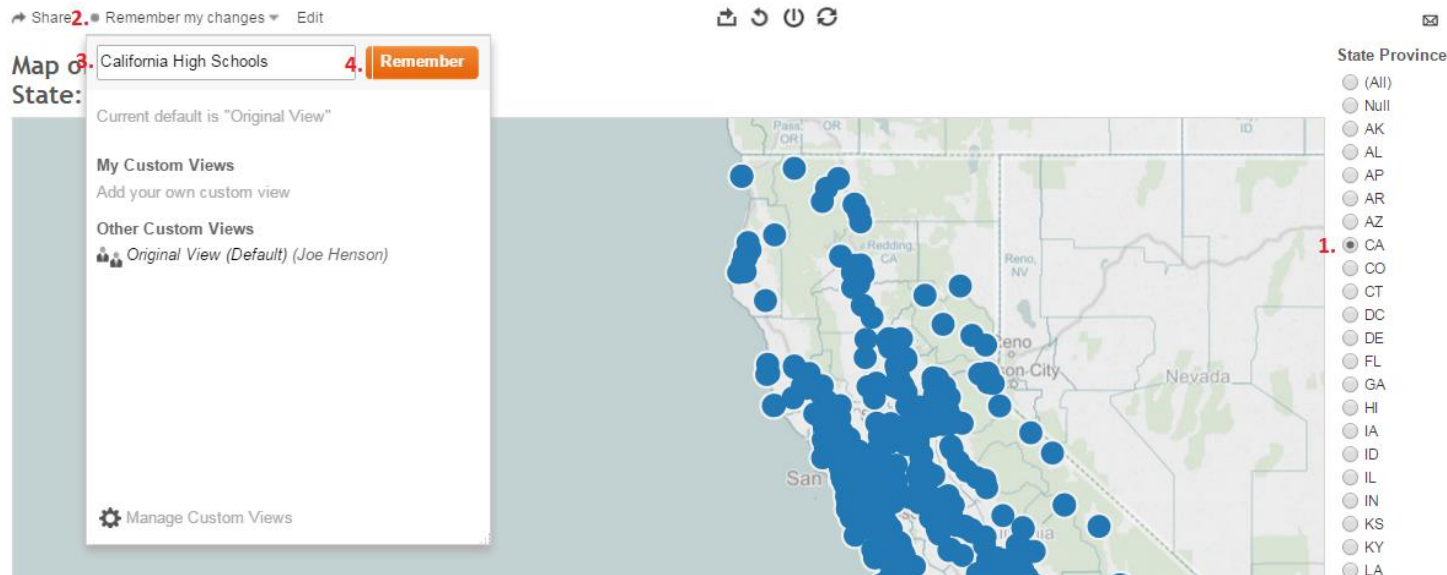
Showing first 200 rows.  
[Download all rows as a text file](#)  
☒ Show all columns

Academic Period	AGE	Age Range	Athlete Ind	Athlete Sport	Athlete Sport Second
201040	Null	unsp	0	Null	Null

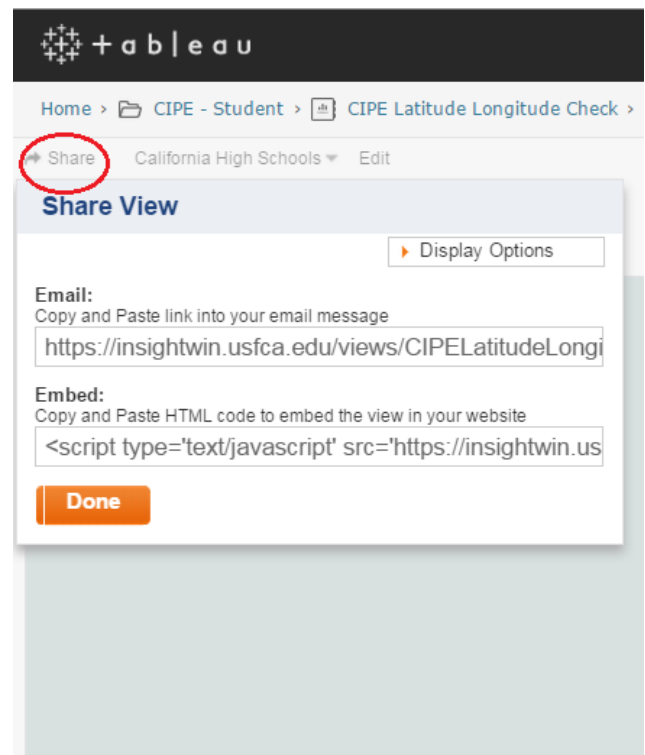
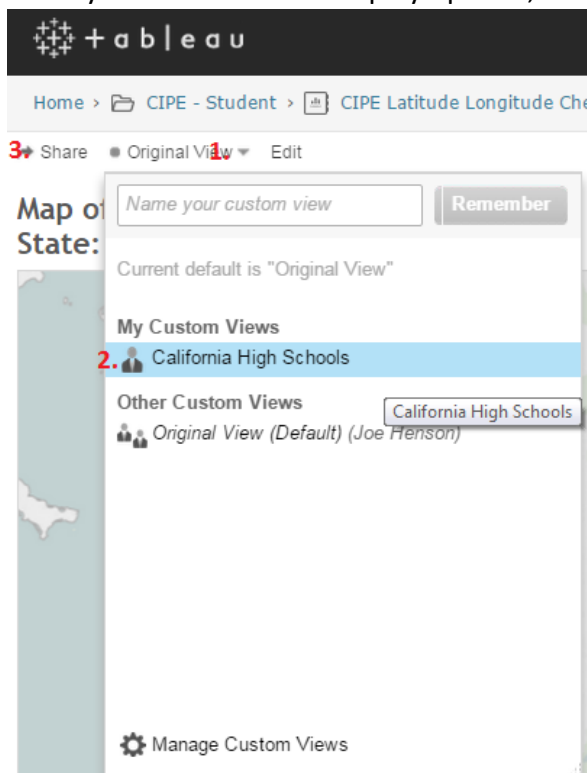
The third export option is the “crosstab” option which will download the immediate data in your view as a crosstab. The fourth and final option is the “PDF” option which will export the view into a portable document format.

## 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.”

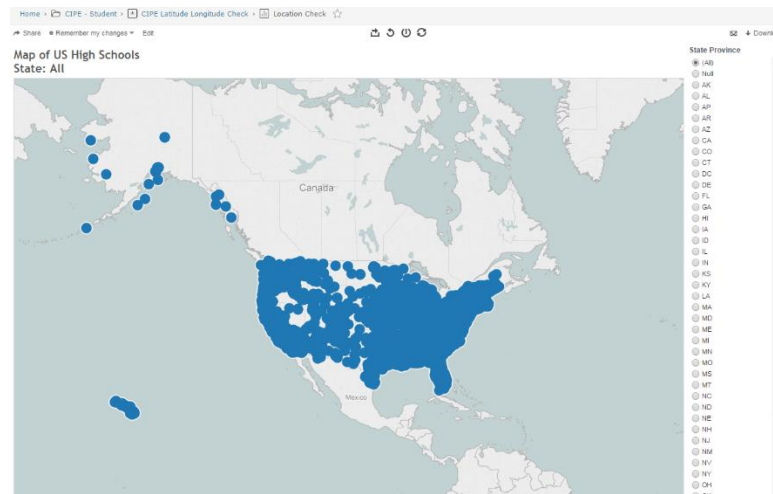


To share this view with other people, select the drill down next to “Original View” and select the title of the customized view you have created. Then select “Share” to the left of the drill down menu. From there you can customize display options, toolbar options, and method of sharing.

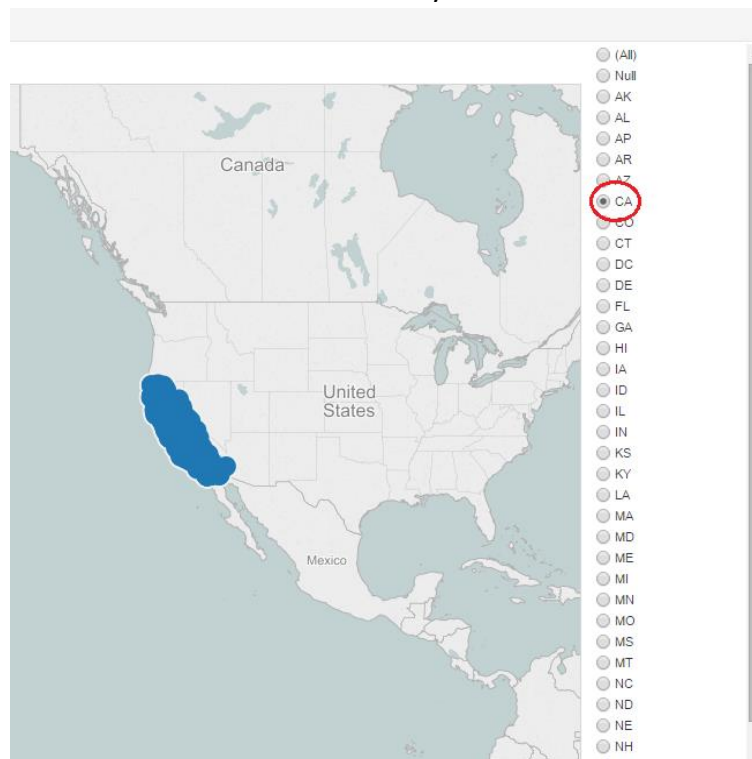


## 11. Using Tableau Maps and Exporting Map Data

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.

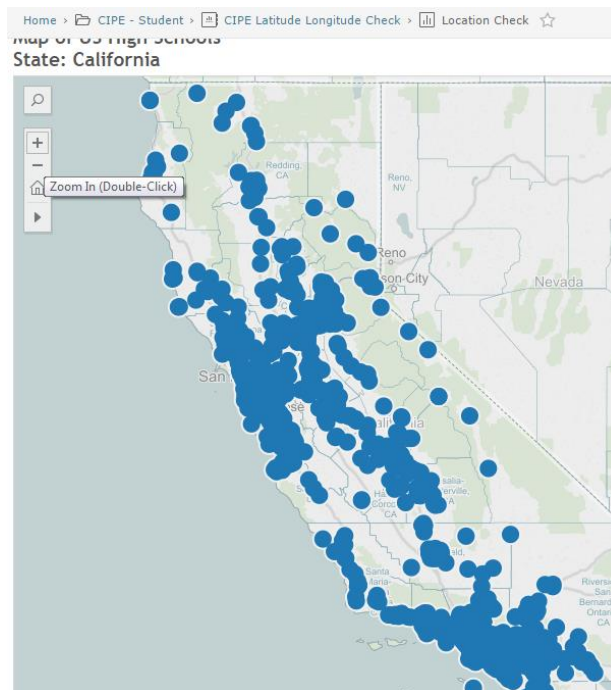


On Tableau Maps, there is usually some sort of selection bar or parameter that allows to you to filter out the data. In this map, there is a selection bar which lets you narrow down each school by state. So let us click on “CA” or California and it will filter out only the schools in California.

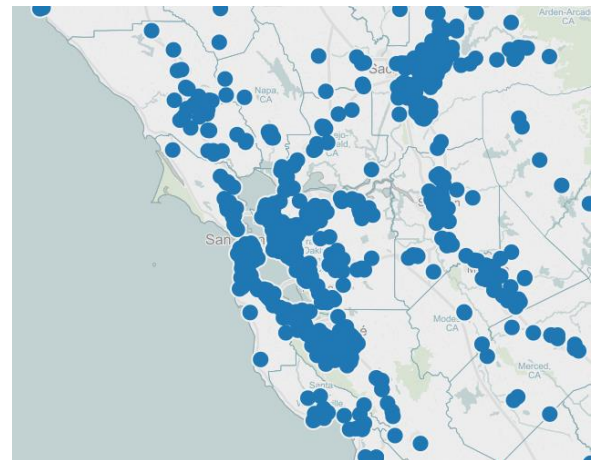
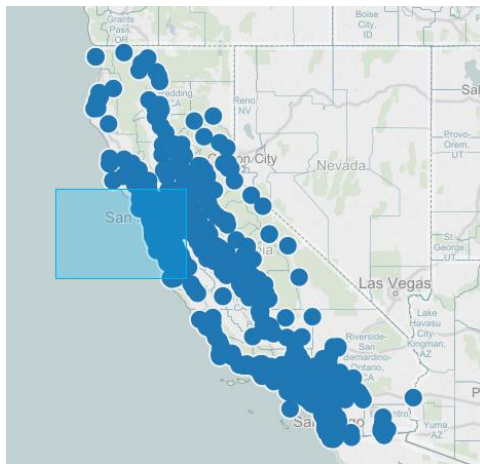


Now we only have the schools in California however, we are too far away to see anything of use. To zoom in on Tableau Maps, hover over the left side of the view and a toolbar will show up allowing you to zoom in and out. The faster way would be to hold down Ctrl + Shift and then click and drag over the area you want to see. To zoom in on California, we will use the first method below.

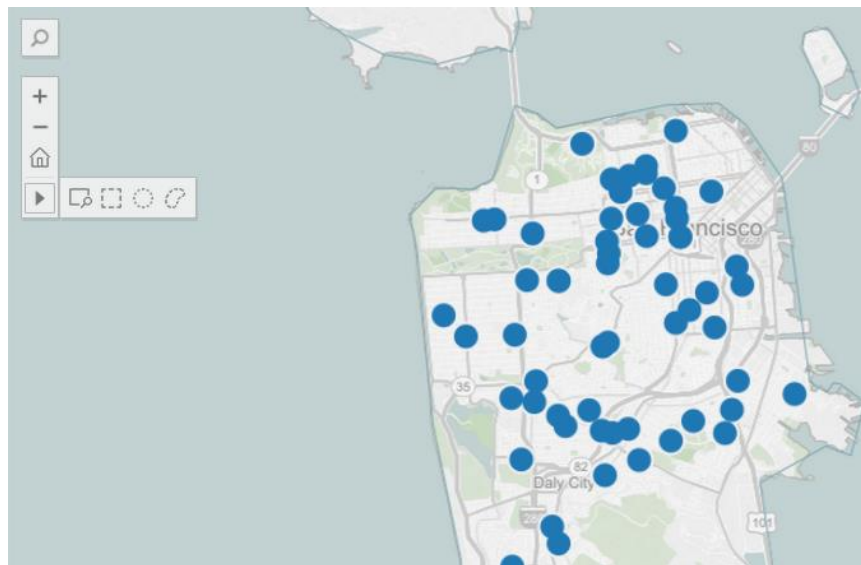




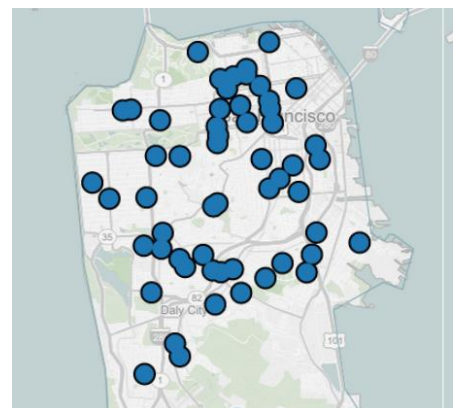
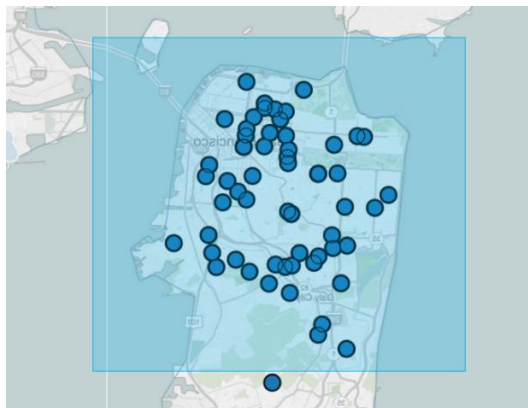
To see the schools in the Bay Area only, we will use the second method shown below. These two can be used interchangeably and are determined by user preference. Some maps will be more advance and will let you filter to see different districts and some maps are more general and only let you filter by 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.

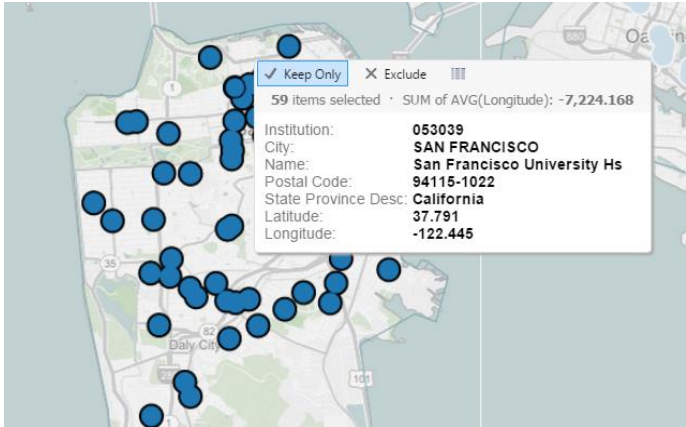


Use the square selection tool for this purpose but most of the selection tool will get the same job done. A lot of Tableau is up to ones' personal choice.



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.

Institution	City	Name	Postal Code	State Province	Latitude	Longitude
W4487	SAN FRANCISCO	Metropolitan Arts	94110	California	37.73229	-122.382
54515	SAN FRANCISCO	San Francisco Inte	94110-342	California	37.77529	-122.422
54497	SAN FRANCISCO	Fei Tian Academy	94103-510	California	37.76723	-122.402
54448	SAN FRANCISCO	San Francisco Flex	94102-122	California	37.78775	-122.411
54439	SAN FRANCISCO	Academy Of Arts /	94131-161	California	37.74531	-122.449
54047	SAN FRANCISCO	City Arts And Tech	94112	California	37.72351	-122.461
53985	SAN FRANCISCO	Bay School Of San	94129	California	37.80079	-122.456
53961	SAN FRANCISCO	Leadership Public	94110	California	37.75529	-122.419
53959	SAN FRANCISCO	Xcel Academy	94122	California	37.76335	-122.464
53884	SAN FRANCISCO	June Jordan Schoc	94112	California	37.71951	-122.425
53159	SAN FRANCISCO	Stamps School	94115	California	37.70205	-122.420