Tableau Users’ Manual

Using Tableau Server to Access the Acorn Institutional Data Warehouse

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Navigation on Tableau Server

Tableau Server Login address: https://idw-bi.ualberta.ca

Definitions:
- Views - Pages that display data in tables or graphs and the display of the information can be change by manipulating elements of the page (e.g. filters)
- Workbooks – contains a group of pages that were developed together from a common data source and can have linked views that are displayed as tabbed views.
- Projects – organizational folders where workbooks can be stored with designated access rights

Projects contain workbooks and workbooks are made up of views.

Accessing a View through the Project screen

The Project screen is what you see the first time you login to the Tableau server. This will be your start page unless you manually change where you want to start (see page 11). To return to this page at any point, click on the UofA logo in the top left corner.

The project page will list all the projects that you have permission to access.

1) Click on the link to the Project you would like to access.

Note* The orange bar next to the “Projects” in the left-hand sidebar indicates that projects are displayed on the screen)
2) This will direct you to a page with a list of all the workbooks that are associated with that project. Click on the workbook that contains the view that you want to see.

(Nota* The orange bar next to the “Workbooks” in the left-hand sidebar indicates that workbooks are displayed on the screen)

3) This page shows links to all the views included in the workbook selected in step 2. Click on the view (image or title) that you wish to look at.
4) This page displays the view you selected. All other views in the workbook are represented by tabs and can be accessed by clicking on the tab (rather than going back to the workbook level).

**Click on + sign near the column header to drill down, e.g. Click on "Reporting Year". The hierarchy designed for this worksheet is: "Reporting Year" -> "View Name" -> Workbook name.**
Modifying the displayed information on a view

The information displayed in a Tableau view can be changed so that you see less information (filtering, keep, exclude, drill up), more information (drill down), reordered (sorting) or highlighted.

Filtering data

1) Click on the upside down triangle on left side of the dropdown filter.
2) Select either one item on the dropdown filter (single value menu) or multiple items (multiple value menu)

**Single value selection**

**Multiple value selection**

Click on boxes of the values to be included or excluded in the table or figure being viewed.
Keep or exclude one or more data cells

1) One data cell
   
   I. Move your mouse over a cell in a table until a tool tip box appears.

   ![Tool tip box](image)

   II. Select “Keep Only” to display only that one cell/value in the displayed table or graph. Select “Exclude” to remove only that one cell/value in the displayed table or graph.

2) Multiple data cells
   
   I. Hold the [Ctrl] key down (or the Command key \([⌘]\) when using a Mac) and then select each cell you want. A tool tip box will pop up when you select each cell.

   II. Once all the cells are selected, click on the “Keep Only” or “exclude” buttons on the tool tip box.

Keep or exclude one or more rows or columns of a table

3) One row/column
   
   I. Select the row header for the row you want to keep or exclude. A tool tip box will pop up when you select the row.

   ![Tool tip box](image)

   II. Select “Keep Only” to display only that row/column in the displayed table. Select “Exclude” to remove only that one row/column in the displayed table.

4) Multiple data rows/columns
   
   I. Hold the [Ctrl] key down (or the Command key \([⌘]\) when using a Mac) and then select each row/column you want. A tool tip box will pop up when you select each row/column.

   II. Once all the rows/columns are selected, click on the “Keep Only” or “exclude” buttons on the tool tip box.
Drill-down or drill-up in a table or graph

The drill-down or drill-up function refers to either expanding or contracting the detail of a particular row or column in a table or Graph

1) **Drill-down**

   I. Move the mouse over a particular row or column. A box with a “+” in it appears over the row or column

   **Fall Headcount**

<table>
<thead>
<tr>
<th>Enrolment Reporting Status</th>
<th>Reporting Year</th>
<th>Undergraduate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Final</td>
<td>2009/10</td>
<td>1,461</td>
</tr>
<tr>
<td></td>
<td>2010/11</td>
<td>1,355</td>
</tr>
<tr>
<td></td>
<td>2011/12</td>
<td>1,367</td>
</tr>
<tr>
<td></td>
<td>2012/13</td>
<td>1,434</td>
</tr>
<tr>
<td></td>
<td>2013/14</td>
<td>1,607</td>
</tr>
</tbody>
</table>

   II. Click on the “+” to drill-down to a level below reporting year. An additional column showing an additional breakdown of reporting year into the student study year appears between reporting year and undergraduate in the table.

   **Fall Headcount**

<table>
<thead>
<tr>
<th>Enrolment Reporting Status</th>
<th>Reporting Year</th>
<th>Study Year</th>
<th>Undergraduate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Final</td>
<td>2009/10</td>
<td>00</td>
<td>204</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Y1</td>
<td>150</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Y2</td>
<td>557</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Y4</td>
<td>470</td>
</tr>
</tbody>
</table>

2) **Drill-up**

   I. Move the mouse over a particular row or column. A box with a “-” in it appears over the row or column.

   **Fall Headcount**

<table>
<thead>
<tr>
<th>Enrolment Reporting Status</th>
<th>Reporting Year</th>
<th>Study Year</th>
<th>Undergraduate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Final</td>
<td>2009/10</td>
<td>00</td>
<td>204</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Y1</td>
<td>150</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Y2</td>
<td>557</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Y4</td>
<td>470</td>
</tr>
</tbody>
</table>
II. Click on the “-” to collapse the column to the left of the reporting year (the column disappears). The column to the right of the “-” gave a more detailed breakdown of the reporting year column (eg. Undergraduate headcount in Y1 for reporting year 2009/10).

Sorting data
Sorting allows you to reorder rows in a table based on the values found in one column. When you hover over a table column a triangular shaped image appears (made up of 3 horizontal bars).

To order the column from highest to lowest values, click on the icon that looks like an upside-down triangle at the right corner of the column header.

<table>
<thead>
<tr>
<th>Reporting Year</th>
<th>Undergraduate</th>
<th>PhD</th>
<th>Masters</th>
<th>Other GS</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009/10</td>
<td>1,461</td>
<td>70</td>
<td>92</td>
<td>23</td>
</tr>
<tr>
<td>2010/11</td>
<td>1,355</td>
<td>80</td>
<td>84</td>
<td>8</td>
</tr>
<tr>
<td>2011/12</td>
<td>1,367</td>
<td>74</td>
<td>69</td>
<td>6</td>
</tr>
<tr>
<td>2012/13</td>
<td>1,434</td>
<td>69</td>
<td>75</td>
<td>8</td>
</tr>
<tr>
<td>2013/14</td>
<td>1,607</td>
<td>63</td>
<td>76</td>
<td>5</td>
</tr>
</tbody>
</table>

The sort reorders all the rows in based on the sort order of the column. Therefore, the reporting year order results in the non-sequential order (2009/10; 2010/11; 2013/14; 2012/13; 2011/12). Also notice that the sort icon now remains visible indicating that a sort was done on this column.

Highlighting
Highlighting changes the brightness of parts of a table or figure which makes them stand out more in the view.

**Highlighting in tables**
- Highlight a row or column by selecting it’s header
- Highlight a cell by selecting the cell

**Highlighting in figures**
- Highlight a value in a graph by selecting the element in the graph (e.g. a bar in a chart or a colour in a stacked bar chart.
- Highlight a value in a graph by selecting the value in a colour legend for the figure.
*(note – the highlight selected items icon next to the legend title should be selected first and appear grey in order for it to work)*
**Resetting and removing changes to Views**

Remove the last change to a view or all the changes

Click back arrow to undo last modification (e.g. filter or keep only selection)

Click the revert all button to return the View to it's default settings

**Remembering and saving information**

**Remember my settings**

When you leave a Tableau view, all the changes that you made (e.g. filters, highlights, drill-downs etc.) are lost.

*To save your setting:*

Click on “remember my settings” in the top left section of the screen. Type in what you want to call the custom view in the field at the top of the drop-down menu. You can save multiple different configurations for a view and call them whatever makes sense to you.

The name of the “Remember my Settings” menu changes to “Original View” once you have saved your first custom view

**Change custom views:**

Edit the saved views by clicking “Manage custom views” on the “Original View” menu. You can either delete a custom view or publish it so everyone with access to the workbook can access the custom view you created.
Exporting data

Method 1 – Downloads whole table

1. Click on the “Export” icon found on the top centre of the page.
2. Select cross-tab data. A download prompt appears asking if you want to download a text file that can be viewed in excel.

You can also use the export icon to export the view as either an image or a pdf file.

Method 2 – Downloads data for selected rows or columns only

1. Click on all the row or column headers of the data you want to download. Select the “View data” icon from the Tool Tip pop-up screen.

2. A pop-up windows appears with a table that has all the data that you selected. At the top and bottom of the table you will find a link that says “download all rows as a text file”. The download file appears as a text file with each row corresponding to a row in the table and a comma between each value in a row (comma delimited). This file can easily be imported into excel for additional analysis.

Printing

WARNING - If you try to print a view using the print function (button or key-stroke) the output may have part of the graph cut off.

1. Click on the “Export” icon found at the top, centre of the page and save as a pdf with the following page size and scaling settings:
2. Open and print the pdf

Improving Navigation

Display of Workbooks and views
You can display workbooks and views as thumbnails (small images of the workbook) or as a lists.

- Thumbnails – works better if you are looking for information displayed in a particular way (table or graph)
- Lists – works better if you have a lot of workbooks or views and you need to display them as a list to get them all displayed on the page.

Set start page
1. Navigate to the page (project, workbook or view) that you want to start on when you first login to Tableau server.
2. Click on the “Account” menu in the top left corner of the screen and select “Make this my start page”

**Favorites**

**Add a Favorite**

- Thumbnail view - Move your over the workbook or view image. Click on the faint outline of a star next to the name on the tool tip that appears.
- List view - click on this star next to the workbook or view to make it a favorite.

**Navigating to Favorite** - Go to the “Favorite” drop-down menu and selecting the favorite that you want.

**Remove a Favorite** – Click on the yellow star next to the workbook or view name (list view). In the thumbnail view click on the star that appears next to the name on the images tool tip.

**Advance searching**

You can do advance searches by using the “Filter” panel on the left side of the screen. Search by:

- Content found in the name of workbooks or information in a view.
- Filter by selecting a project, owner, tag, date or favorite. This displays all the workbooks or views associated with the selection. For example, selecting an owner will display all workbooks and views that are owned by a particular owner.
- You can add multiple filters. For example, you can have it display all the workbooks in “student” projects that have content related to “retention”.