



UNIVERSITY OF SOUTH ALABAMA

Tableau Data Visualization Platform – Quick Guide

Tableau has been adopted as a software platform by USA for complex data analysis, the creation of powerful visualizations, and the publication of dynamic dashboards. If you are a USA employee (faculty or staff) with a need to analyze and develop visualizations of our University's data, you may reach out to the Office of Institutional Research regarding obtaining access to Tableau. Currently, deans and many administrative leaders have licenses to use Tableau.

With Tableau access, faculty and staff can explore, engage and interact with relevant data to create powerful visualizations and dashboards for later publication. Individual "sandboxes" for exploration have been established to save your projects. This quick guide provides a brief introduction to navigating and using the many features of Tableau.

Guidelines for publication will be provided in the near future; however, users are reminded of their individual Family Education Rights and Privacy Act (FERPA) responsibilities to maintain the security of protected personal information. More information about FERPA can be obtained at <https://www2.ed.gov/ferpa>.

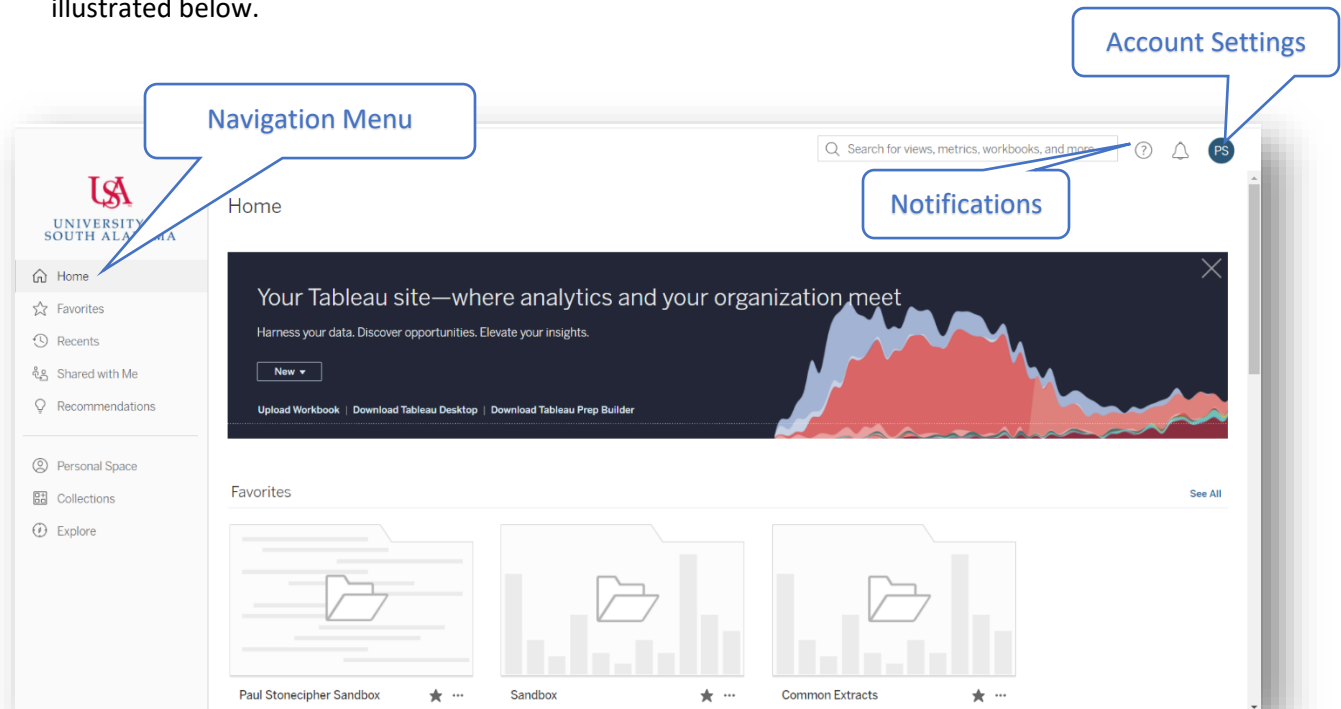
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- To access USA's Tableau site, enter <https://analytics.southalabama.edu/> in the browser address bar
 - Enter your Jag Number and JagNet Password. This is the same login information used to access your JagMail and other USA secured single sign-in platforms such as Banner or PAWS. Once entered, select **Sign In** to view the USA Tableau Home Page.

A screenshot of the Tableau sign-in page. At the top, a blue header bar contains the text "Sign in with your JAG Number and JagNet Password". Below this, there are two input fields: the first is labeled "JAG Number" and has a person icon to its left; the second is labeled "JagNet Password" and has a lock icon to its left. Below the input fields is a red button with the text "Sign In". At the bottom of the page, there is a list of instructions:

- Your Password is the same JagNet Password that you use for JagMail. If you are having issues signing in and have a JagNet recovery method set, click [HERE](#). For additional assistance with your JagNet account or password, please see [JagNet](#).
- Health System users please see [JagNet for Health System Employees](#).
- Please do NOT bookmark this page. Only bookmark the Student or Faculty/Staff Logins page.
- When you are finished using SSO, always Exit and close your browser to protect your privacy.

Home Page

Upon successful entry of your login information, you will be brought to USA's Tableau Home Page, illustrated below.



You have a few different options on how to navigate from the Home Page. Favorite, recent, and recommended projects will appear with thumbnail images of the project below the page banner. Another quick way to find your project is to select **Explore** from the **Navigation Menu**

Explore Page

Content within Tableau is organized in a hierarchical structure similar to a Microsoft Windows folder system.

The screenshot shows the Tableau Explore page for the University of South Alabama. The left sidebar contains navigation options: Home, Favorites, Recents, Shared with Me, Recommendations, Personal Space, Collections, and Explore. The main area displays a list of folders under 'Top-Level Projects'. A search bar at the top right contains the text 'Search for views, metrics, workbooks, and more'. Three callout boxes highlight key features: 'Filter' points to the 'Top-Level Projects' dropdown, 'Search' points to the search bar, and 'Sort' points to the 'Sort By: Name (a-z)' dropdown.

| Type | Name | Actions | Projects | Workbooks | Views | Data sources | Owner | Created |
|--------|-----------------|---------|----------|-----------|-------|--------------|---------------|------------------------|
| Folder | Administration | ... | 0 | 1 | 1 | 0 | Laura Cole | Aug 18, 2021, 1:25 PM |
| Folder | Common Extracts | ... | 0 | 0 | 0 | 4 | Nathan Robins | Apr 8, 2021, 9:30 AM |
| Folder | Production | ... | 4 | 0 | 0 | 0 | Nathan Robins | Apr 13, 2021, 9:56 AM |
| Folder | Sandbox | ... | 1 | 0 | 0 | 0 | Laura Cole | Nov 17, 2021, 2:50 PM |
| Folder | Training | ... | 0 | 2 | 4 | 0 | Laura Cole | Nov 15, 2021, 10:24 AM |
| Folder | Validation | ... | 3 | 0 | 0 | 0 | Laura Cole | Apr 7, 2021, 4:20 PM |

Similar to accessing files in Windows, you may **filter** the visible sections, limiting the options to categories such as “Top-Level Projects,” “All Views,” “All Workbooks” and a variety of other choices. Additionally, users can **search** project names for the item they wish to use. Finally, options can be **sorted** by name, project, data sources, owner, or creation date.

Illustrated below are **search** results for the term “Enrollment.” After entering the desired keyword, **views**, **workbooks**, and **projects** will be displayed associated with the designated keyword.

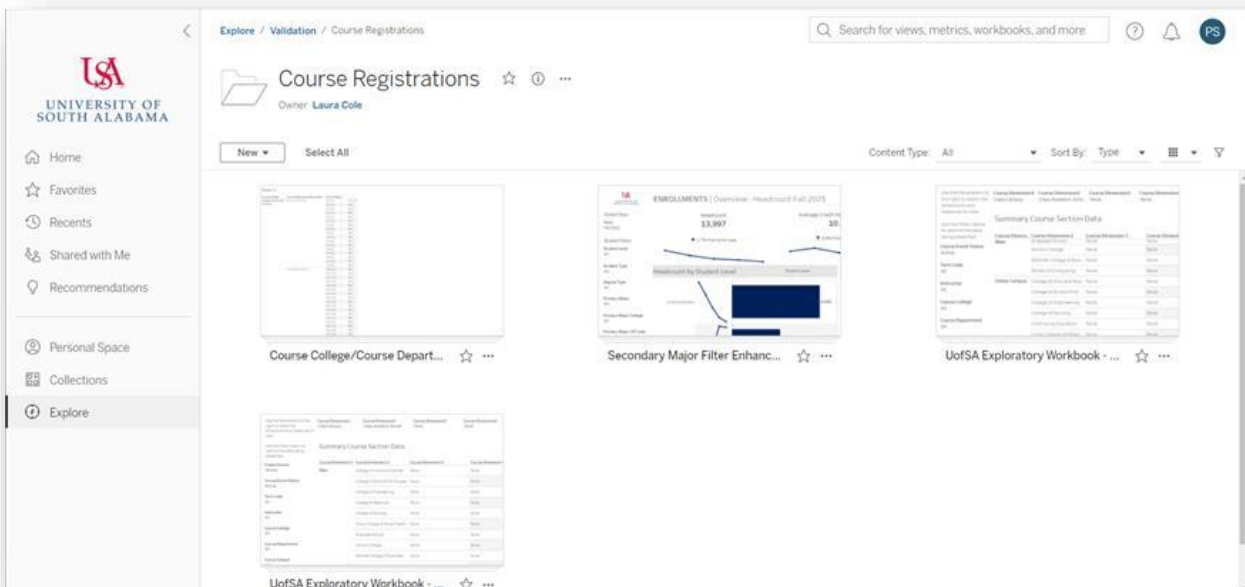
The screenshot shows the Tableau Explore page with the search bar containing the text 'Enrollment'. The search results are displayed in a grid format, showing views, workbooks, and projects. The search bar also includes a 'Press Enter to see all' prompt. The results are categorized into Views (4), Workbooks (1), and Core Development - E... (1). The views section includes 'Enrollment Comparison', 'Freshman Enrollment...', and 'Trend of Freshman En...'. The workbooks section includes 'Enrollment Comparison'. The core development section includes 'Core Development - E...'. The right sidebar shows a list of items with their creation dates.

| Category | Name | Owner | Views | Created |
|-------------------------|-------------------------|---------------|-------|------------------------|
| Views | Enrollment Comparison | Nathan Robins | 96 | Apr 27, 2021, 12:36 PM |
| Views | Freshman Enrollment... | Laura Cole | 0 | Oct 6, 2021, 1:30 PM |
| Views | Trend of Freshman En... | Laura Cole | 0 | Apr 8, 2021, 9:30 AM |
| Views | Enrollment Comparison | Laura Cole | 0 | Apr 27, 2021, 12:36 PM |
| Workbooks | Enrollment Comparison | Laura Cole | 0 | Nov 12, 2021, 9:05 AM |
| Core Development - E... | Core Development - E... | Nathan Robins | 724 | Nov 12, 2021, 9:06 AM |
| | | | | Nov 12, 2021, 9:37 AM |
| | | | | Nov 12, 2021, 9:44 AM |
| | | | | Nov 12, 2021, 9:46 AM |
| | | | | Nov 12, 2021, 9:50 AM |

Projects

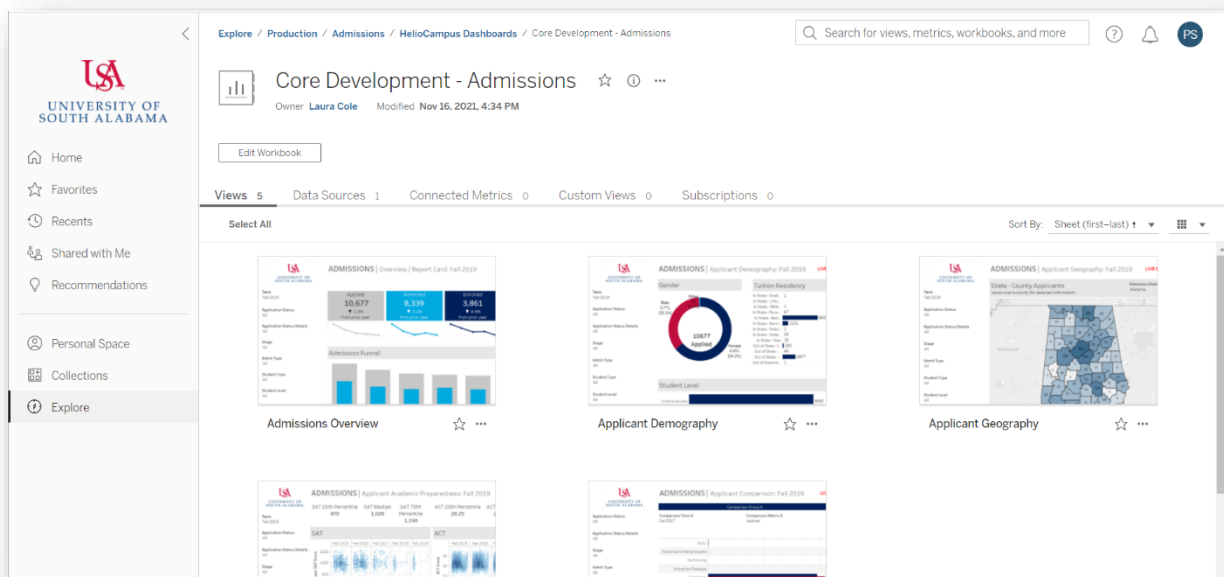
Within Tableau, **Projects** are used to hold and organize related content and to assist in delegation of content access. A project may contain nested or “child” projects of the “parent” project folder as well as related **Workbooks**.

Illustrated below is an example of the “Course Registrations” project with four available workbooks visible.



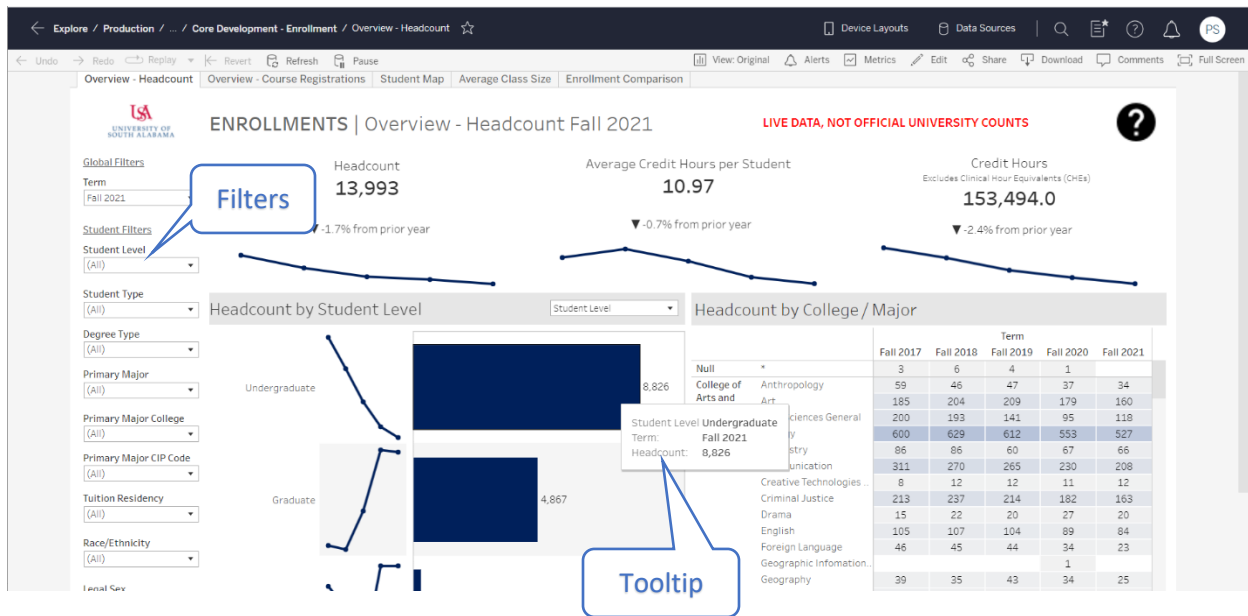
Workbooks

A **Workbook**, within a **Project**, contains one or more sheets (similar to the different Tabs in Microsoft Excel). Each sheet can be a different worksheet, dashboard, or story.



Views

Views are the collections of visualizations that have been developed and integrated into a Dashboard.



Many views will contain **Filters** which may allow a user to drill-down within the data. In the illustration above, for example, a user may change the term selected or filter by student level, degree types, college, primary major and more. For example, changing the Primary Major College will limit the visuals and data presented to just individual college selected.

Additionally, some visualizations will include **Tooltips** which can be viewed by hovering the mouse over the view's data points. In the example above, the Tooltip provides the student level, term, and headcount illustrated in the bar chart.

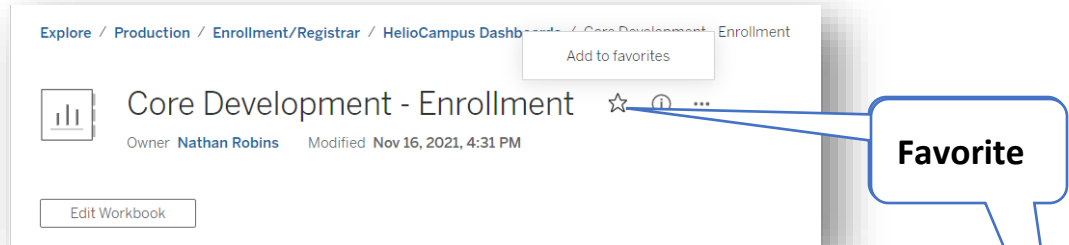
When interacting with views, using the filters or potential sorting options will update the visualizations for the moment. However, the view will always revert to the default set up by the Workbook's creator. Feel free to interact and explore with the data to get to the level of granularity you are interested in exploring without concerns that you might "break it."

Favorites

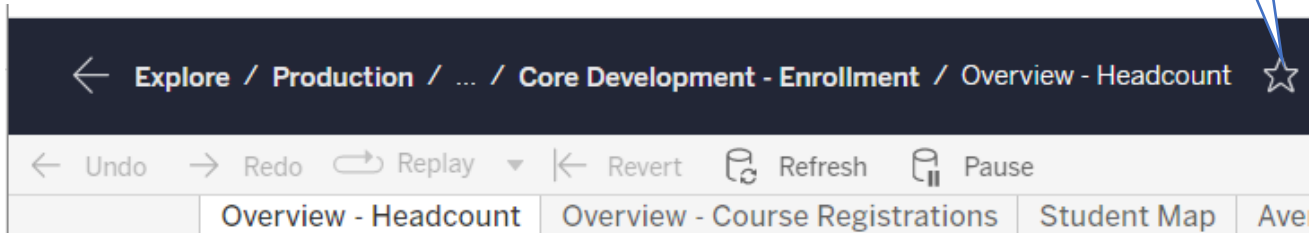
Using **Favorites** is a great way to easily find and retrieve projects, workbooks or views quickly and easily by adding them to your list of Favorites in the **Navigation** panel.

To select a favorite Workbook, click on the white star next to the item's name or file path, as illustrated here:

Workbook:

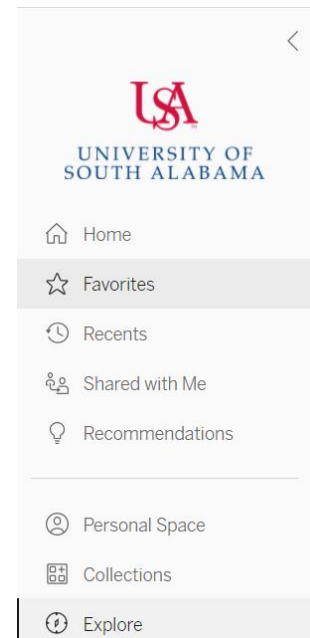
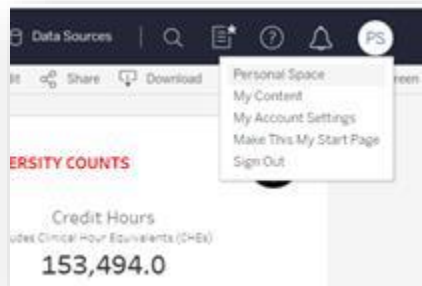


View:



To access your favorited workbooks and views, go to the **Favorites** page from the **Navigation** menu.

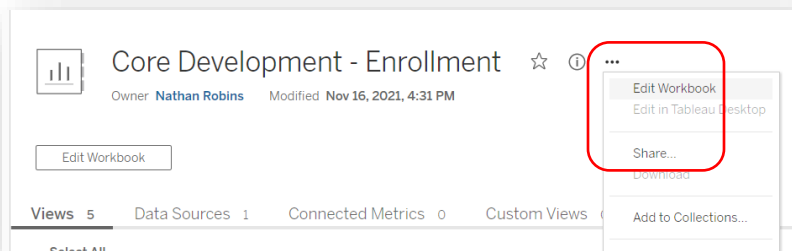
You can also select any page to be the starting page after logging into the site. While viewing the Workbook or View that you want, select the top right button for your content and account settings (usually your initials, "PS" in the example below). From the drop-down menu, select "Make This My Start Page."



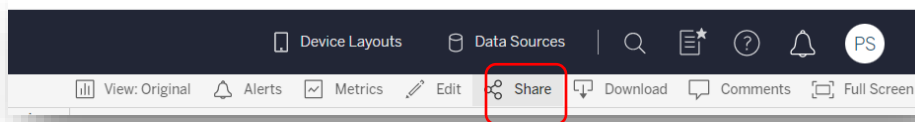
Sharing

Projects, Workbooks, and Views can be shared with other authorized users. Please note, only people with permissions enabled can see items. Additionally, users should be mindful of FERPA guidelines when sharing items from Tableau.

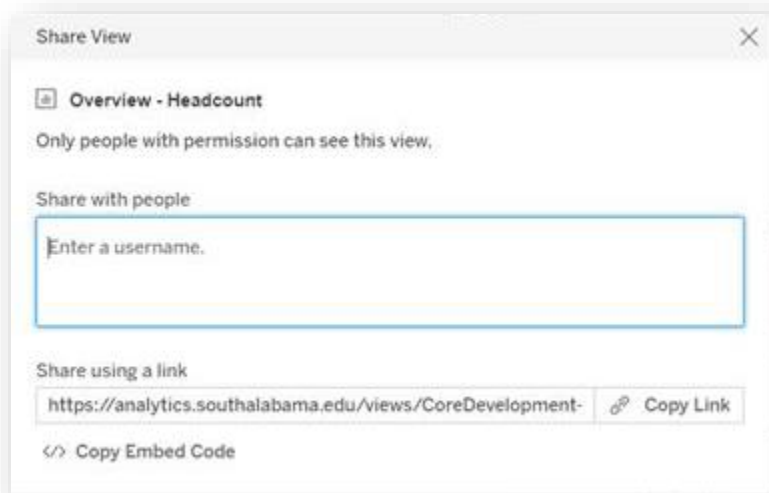
To share a workbook, select the ellipsis (three dots) near the Workbook title, and choose **Share** from the drop-down menu.



To share a view, select **Share** from the tool bar at the top right of the page.

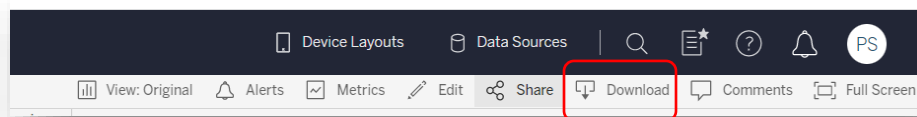


Note: If you want to share a specific view with the filters/sorting applied, a user simply makes those selections first in their view, and then sharing that view with another person.

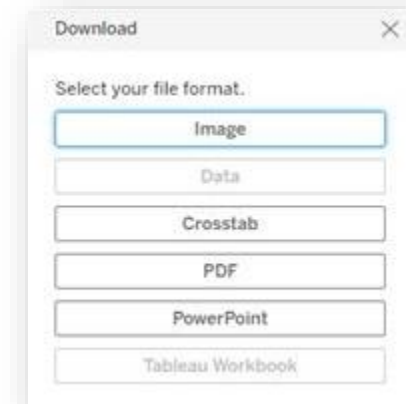


Downloading

Workbooks and views can be downloaded as an image, crosstab, PDF, and even PowerPoint slides. To download, select **Download** from the menu bar at the top right of the page.



Once you select Download, choose the file format you want to download.



Formats Available:

- **Image** – Downloads an image of the view in .png format
- **Crosstab** – Opens a dialog window where you can select to download as a Microsoft Excel (.xlsx) file or as a .csv file.
- **PDF** – Opens a dialog where you can select what to include in the PDF as well as set the scaling, paper size, and orientation of the PDF created.
- **PowerPoint** – after making the selections of what to include in a dialog window, a PowerPoint presentation is created with selected sheets as images within the presentation.

This is just a brief introduction into the capabilities of Tableau and certainly does not cover all the things users can do, depending on your license level. The following resources may help you to make the most out of your experience with this data and visualization platform.

Tableau training videos and tutorials - <https://www.tableau.com/learn/training>

Tableau starter kit - <https://www.tableau.com/learn/starter-kits>

Tableau Knowledge Base - <https://www.tableau.com/support/knowledgebase>

Tableau live online training - <https://www.tableau.com/learn/series/live-training>

Tableau virtual instructor-led Training - <https://www.tableau.com/learn/classroom>