

Analytics powered by Tableau

Report Management using Tableau Server features



Reporting Components

The **Data**

The **Schedule**

The **Delivery**

The **Format**

The **Audience**

The **Content**

Tableau Server Features - Interactive

<https://oiaanalytics.acsu.buffalo.edu/t/GDS/views/GrAdmit-Analytics/ProgramYields>

Share - Cut and paste links into email or embedding into webpage.

Not very useful for us due to our current licensing but "There are always alternatives".

Remember my Changes/Original View - customized personal views (ex. MA/MS)

Edit - For licensees with Publish rights they can edit the report on-line

Export – Image (PNG), Data (CSV), Crosstab (CSV), PDF

Refresh Data - Manual refresh of data. Can be automated

Subscription - Get reports emailed to you on a schedule (email demo)

Download - Download entire report and all associated data.

Need Tableau Reader or Desktop to open TWBX format

Comments - Viewers can post comments. Can be turned off

Tags - Keywords that can be used for searching and navigation

Who has seen this view - Server keeps track of who has viewed report.

The **Data**

Source: InfoSource (Oracle), SDR (MS-SQL), Excel, MSAccess, something else

Schedule: Static or Dynamic

Account: Embedded

InfoSource (Oracle) -

<https://oiaanalytics.acsu.buffalo.edu/t/Demo/views/InfoSource-Live/Entity-Hierarchy>

SDR : Strategic Data Repository (MS-SQL) -

<https://oiaanalytics.acsu.buffalo.edu/t/Demo/views/SDR-Live/GrAdmit-Program-Yields>

Excel or Access Database (UBfs) -

<https://oiaanalytics.acsu.buffalo.edu/t/Demo/views/UBfs-Live/Excel-GrAdmit>

Important Tip: Use UNC path not drive letter

https://oiaanalytics.acsu.buffalo.edu/t/Demo/data_connections/357

Data Refresh - Manual or Automated

The **Schedule**

OneTime, Daily, Weekly, Monthly, Semester, Annual

<https://oiaanalytics.acsu.buffalo.edu/schedules>

Subscription

Extracts

The **Delivery**

Interactive - Through our secure Tableau Server or download to Tableau Reader

Email - Subscriptions

Web - Post PDF or PNG to public or secure web site

The **Format**

PDF, Excel, CSV, PNG

The Audience

The Provost, the Deans and the VP's

Interactor Licensing (OIA purchased 25)

<https://oiaanalytics.acsu.buffalo.edu/licensing>

https://oiaanalytics.acsu.buffalo.edu/system_users

Sites: <https://oiaanalytics.acsu.buffalo.edu/sites>

Default - Created at installation. Best used for Testing

Demo - Static reports used for demonstrations purposes only

Provost - Institutional reporting with Group and User Filtering

Graduate Education - Graduate Enrollment reporting with Group and User Filtering

Unit Specific sites - Reports can be produced specific to individual units

Projects: <https://oiaanalytics.acsu.buffalo.edu/projects>

Groups: <https://oiaanalytics.acsu.buffalo.edu/t/GDS/groups>

Users: <https://oiaanalytics.acsu.buffalo.edu/t/GDS/users>

User Filtering with Sets and Groups

<https://oiaanalytics.acsu.buffalo.edu/t/GDS/views/GrAdmit-Analytics/ProgramYields>

Demo with alternate login and Desktop publishing

http://onlinehelp.tableausoftware.com/current/pro/online/en-us/help.htm#publish_userfilters_ex1setting.html

All of UB

Core Licensing

Includes Guest Account for non-UB access

7 billion of your closest friends

Tableau Public (Free and Premium) -

<http://www.tableausoftware.com/public/gallery>

With Free:

Unrestricted Access

Limit to 100,000 records

50 Mb quotas per free account

Excel and CSV data formats only

Users can download report as well as data

Share for email and embedded link

No Service Level agreement - (i.e. features may not be available due to load)

UBCMS Integration

<http://apb.buffalo.edu/data-reports/tableau-analytics/Tableau-Resources/TableauPublic.html>

http://public.tableausoftware.com/views/NewYorkStateIPEDSHigherEdDirectory/HigherEdInstitutionsbyCongressionalDistrict?:embed=y&:display_count=no

Important Tips:

How to delete a Tableau Public Workbook

<http://www.tableausoftware.com/public/community/help#delete-workbooks>

iPad App access <http://itunes.apple.com/ca/app/tableau-mobile/id434633927?mt=8>

Tableau Server Features - Non-Interactive

TabCMD -

http://onlinehelp.tableausoftware.com/current/server/en-us/help.htm#tabcmd_cmd.htm

<http://kb.tableausoftware.com/articles/knowledgebase/installing-tabcmd>

<http://kb.tableausoftware.com/articles/knowledgebase/using-tabcmd>

C:\Program Files (x86)\Tableau\Tableau Server\8.0\extras\TabcmdInstaller.exe

Can be run from any computer and scheduled with "Task Scheduler"

Use to automate reports

Generate a PDF, CSV or PNG of a single view or entire workbook

Deliver via email with "Blat" (email demo)

Post to web site

Create Sites, Projects and Groups

Add users and assign to groups

Schedule Data Extracts with "refreshextracts" - **Yet to be tested and deployed**

```
"c:\Program Files (x86)\Tableau\Tableau  
Server\8.0\extras\Command Line Utility\tabcmd" export -s  
https://oiaanalytics.acsu.buffalo.edu --no-certcheck -u  
<account> -p <password> -t Demo "GrAdmit-  
Analytics/InternationalBalloonMap" --pdf --pagelayout  
landscape -f "E:\Analytics\Tableau\Jobs\GrAdmit-Analytics-  
International-Balloon-Map"
```

```
"c:\Program Files (x86)\Tableau\Tableau  
Server\8.0\extras\Command Line Utility\tabcmd" createsite  
"Graduate Education" -r GDS -s  
https://oiaanalytics.acsu.buffalo.edu --no-certcheck -u  
<account> -p <password>
```

```
"c:\Program Files (x86)\Tableau\Tableau  
Server\8.0\extras\Command Line Utility\tabcmd" creategroup  
PRV -s https://oiaanalytics.acsu.buffalo.edu --no-certcheck -u  
<account> -p <password> -t PRV
```

```
"c:\Program Files (x86)\Tableau\Tableau  
Server\8.0\extras\Command Line Utility\tabcmd" addusers EDS  
--users EDS-Users.CSV --no-complete -s  
https://oiaanalytics.acsu.buffalo.edu --no-certcheck -u  
<account> -p <password> -t GDS
```

Additional Resources

OIA Analytics powered by Tableau

<http://apb.buffalo.edu/data-reports/tableau-analytics.html>

Tableau use in Higher Education

Berkeley Office of Planning and Analysis

<http://opa.berkeley.edu/statistics/DashboardUnderGradGraduationRates.html>

http://public.tableausoftware.com/shared/FQ5C8WTFS?:display_count=yes

Cornell Institutional Research & Planning

<http://irp.dpb.cornell.edu/>

Utah State Office of Analysis, Assessment and Accreditation

IPEDS Peers Dashboard -

http://usu.edu/aaa/dashboard_analysis.cfm

National Survey of Student Engagement -

http://usu.edu/aaa/nsse_paged.cfm

2012 Tableau Customer Conference (select sessions)

Educations Showcase: How 3 Institutions are advancing their Missions

<http://www.tableausoftware.com/tcc12conf/videos/institutions-advancing-missions>

The 5 Most Influential Visualizations of All Time

<http://www.tableausoftware.com/tcc12conf/videos/5-influential-visualizations>

Understanding Table Calculations: Top 10 Great Examples

<http://www.tableausoftware.com/tcc12conf/videos/table-calc-examples>

Tips & Tricks for Beginners

<http://www.tableausoftware.com/tcc12conf/videos/tip-tricks-beginners>

Additional Resources

Tableau Higher Education group

<http://community.tableausoftware.com/groups/higher-education>

Viz of the Day

<http://www.tableausoftware.com/public/community/viz-of-the-day>

Community Ideas Forum

<http://Community.tableausoftware.com/community/ideas>

LinkedIn Groups

Tableau Software Fans and Friends

Visual Analytics

EDUCAUSE