

Tableau Portal Quick Guide v3.0

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Introduction to Tableau

TABLEAU allows authorized users to view reports in an internet browser. You can:

- Use filters to see the data that is relevant to you.
- Export tables/charts into Excel, Word etc.
- Download the underlying data
- Print views and images as PDFs.

Logging on

Signing into Tableau is easy! Use your Tufts User name (UTLN) and your SSO password at this site*:

go.tufts.edu/reports

*Please note that you need to be on campus or connected through [VPN](#) to log into Tableau



Exploring the Tableau Portal

The screenshot shows the Tableau Portal interface. At the top, there is a navigation bar with tabs for Finance, Content, Users, Groups, Schedules, Tasks, and Status. A search icon and a user profile for Daddario, Barbara are also visible. Below the navigation bar, there are navigation tabs for Projects (14), Workbooks (262), Views (1,200), and Data Sources (53). A '+ New Project' button and a '0 selected' indicator are present. A search bar is located on the left. Below the search bar, there are 'General Filters' for Owner, Created on or after, and Created on or before. The main content area displays two report cards: 'Budget & Finance' and 'Budget Center Reports'. A callout box with a red border and a red arrow pointing to the filter icon (G) contains the text: 'We suggest you hide the left filters (G) when looking at a reports.' Other callouts (A, B, C, D, E, F) point to various UI elements: A (Navigation tabs), B (Filtered search), C (Sort options), D (Project/Workbook view option), E (Menus), and F (Tableau site switcher).

A: **Navigation tabs** giving access to Projects, Workbooks and Views

B: **Filtered search** to assist in finding content on the Portal

C: **Sort** options

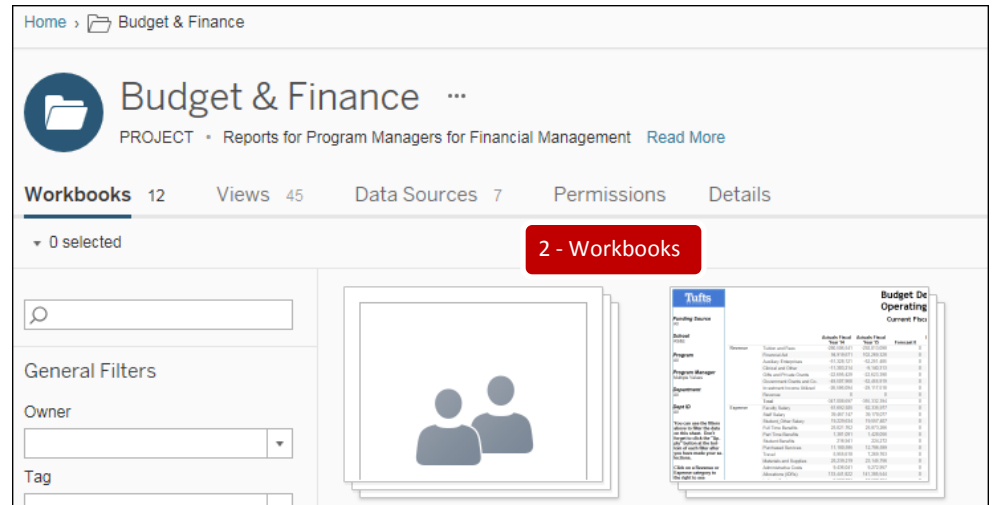
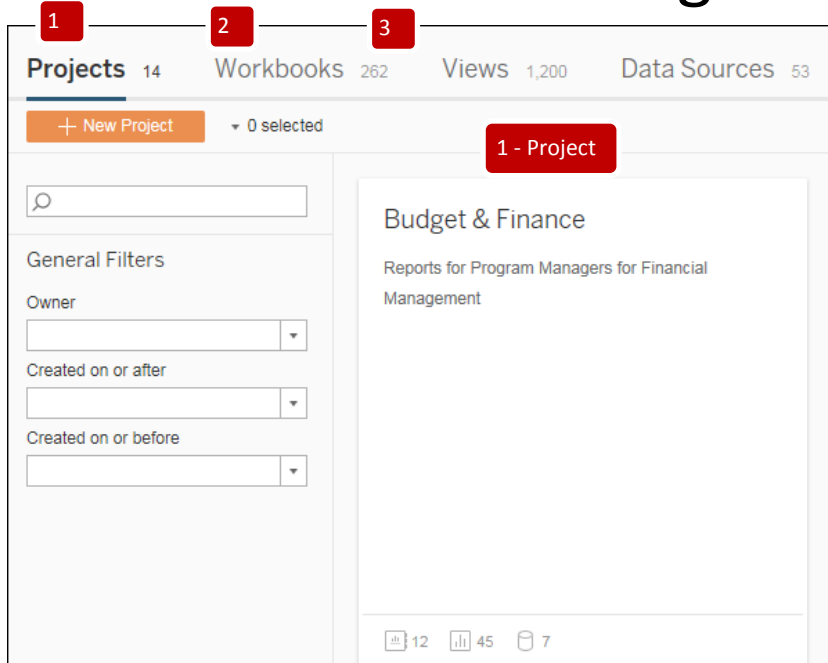
D: Project/Workbook **view option** ( for folder view,  for list view)

E: **Menus** giving access to help, favorites and user preferences. You sign off from the server using this menu

F: If you have access to more than one Tableau **site** this is where you switch to that site

G: **Filters**  click to hide left filters.

Understanding the Structure of the Portal



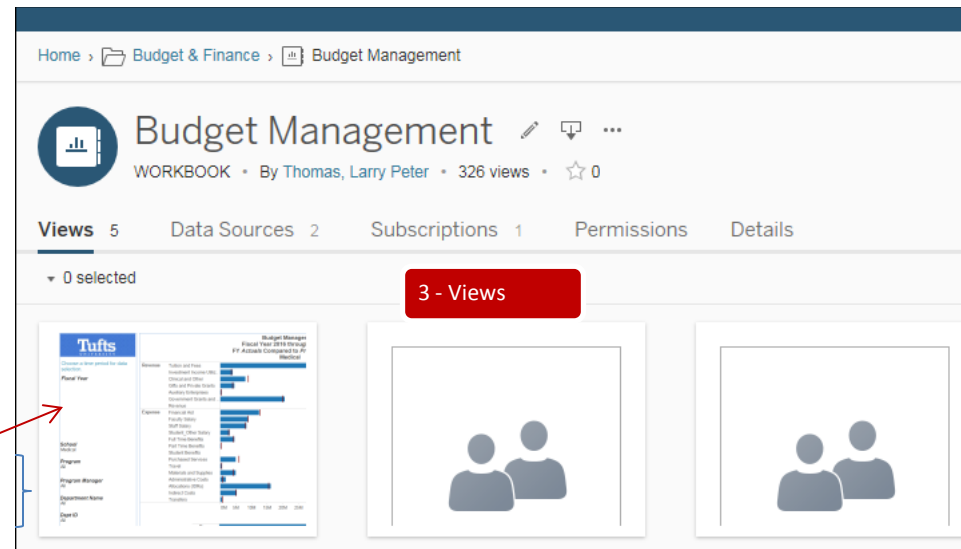
1 - Projects > 2 - Workbooks > 3 - Views

The server is divided into several main **Projects**, which cover broad categories of information (e.g. My Transactions, Budget & Finance)

Projects (1) contain **Workbooks (2)**, which themselves contain individual **Views (3)** – the interactive tables/charts/dashboards that show the information

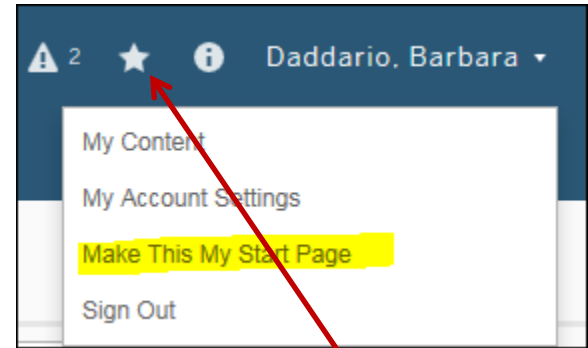
When you click on a project you will see the Workbooks in that Project. Click on the Workbook and you will see the Views in that Workbook. Click on the view and the report will open.

ALWAYS start with the first view of any workbook.



Start Page and Favorites

Start Page- If you are only Interested in a particular group of reports, for example My Transactions, you can navigate to these reports and then select **'make this my start page'** from this menu. The next time you log in you will start from this point. You can return to this screen and change your personal options at any time.

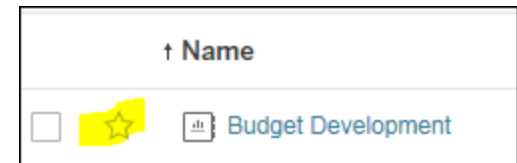
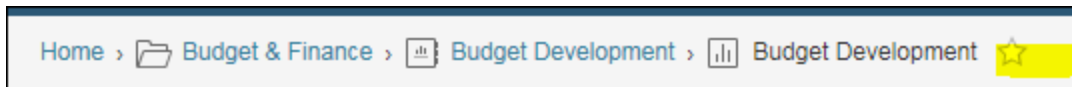


There are various ways to add **Favorites**.
Click on the Star

- From the Folder View
- After you open the Workbook
- From the List View



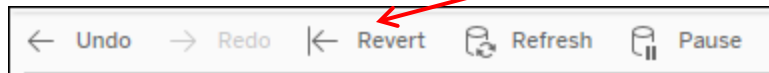
Click the Star to view your favorites



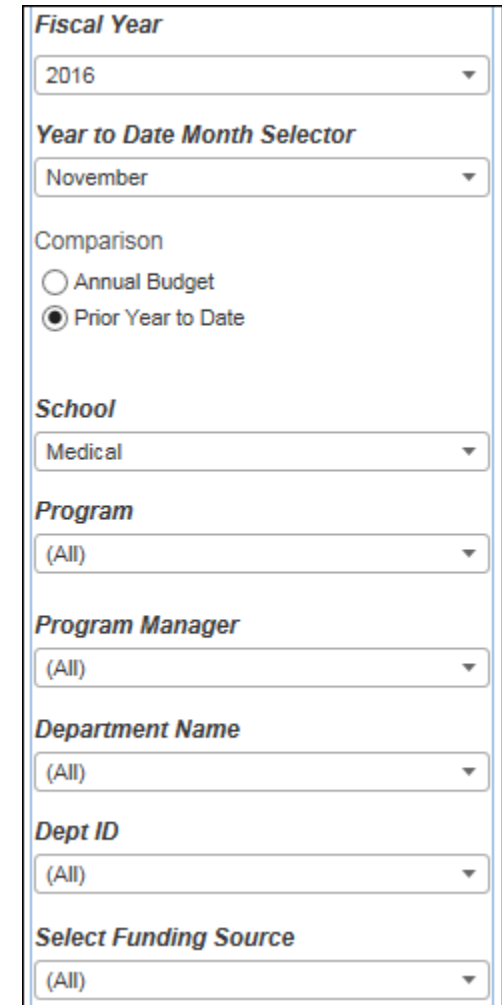
Interacting with the Views

Filtering Data: Most Views contain filters, generally located to the left of the view, that allow you to select just the data in which you are interested; for example you may only wish to see data for a particular year, division, college or exam etc. Select the options that you want from the filters and the view will automatically update (you may need to click apply to update on some filters). If the display is empty, it is likely that your filter choices return no information.

Resetting Filters: If your filter choices have become confusing, or you wish to return to the original view of the data, you can use the 'Revert' button located on the tool bar.



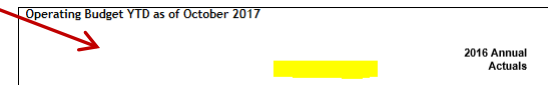
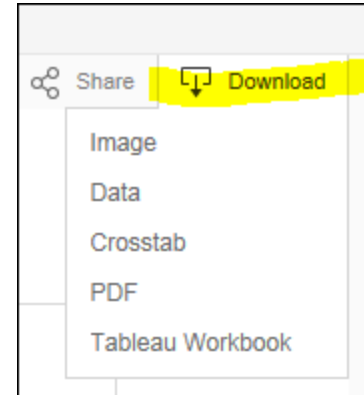
Tooltips: Many reports have a tooltip associated with data points on graphs or tables. If you hover your mouse over the mark you will see additional information in the Tooltip.

A vertical filter panel with the following sections: 'Fiscal Year' with a dropdown menu showing '2016'; 'Year to Date Month Selector' with a dropdown menu showing 'November'; 'Comparison' with two radio buttons, 'Annual Budget' (unselected) and 'Prior Year to Date' (selected); 'School' with a dropdown menu showing 'Medical'; 'Program' with a dropdown menu showing '(All)'; 'Program Manager' with a dropdown menu showing '(All)'; 'Department Name' with a dropdown menu showing '(All)'; 'Dept ID' with a dropdown menu showing '(All)'; and 'Select Funding Source' with a dropdown menu showing '(All)'. A red bracket on the left side of the panel groups the 'Fiscal Year' and 'Year to Date Month Selector' sections.

Going further with your Data

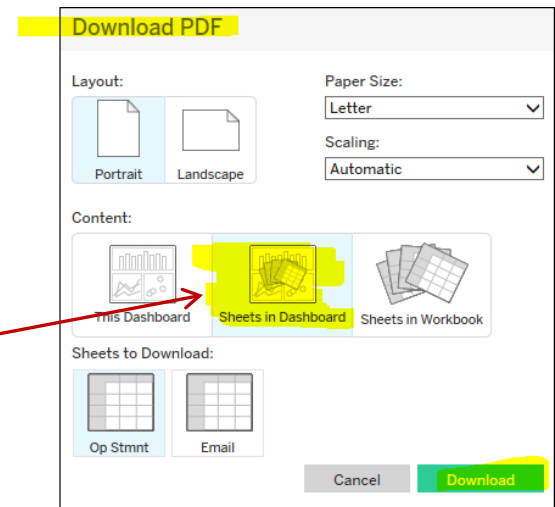
Export Data:* As well as viewing the data, you can also export the underlying data into Excel directly using the 'Data' or 'Crosstab' options, where crosstabs summarizes the data like a pivot table. Not all views will have these features available due to the confidential or sensitive nature of the data.

*Depending on where clicked on the report you may not see the Crosstab option under download. If you do not see the cross tab option click in blank space near the crosstab on the report. Try to download again and you should see the Crosstab.



Copy / Export Images and Views: Clicking on the 'Image' option will export any view as an image which can then be imported into other applications such as Word or an e-mail.

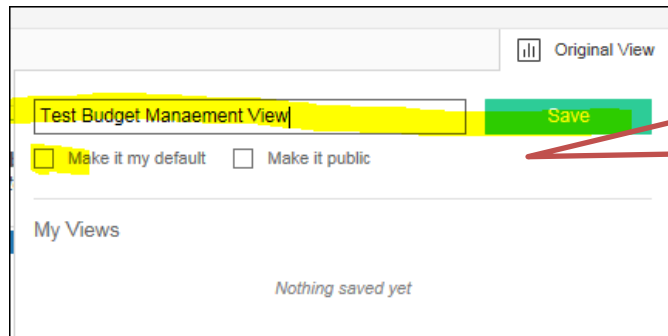
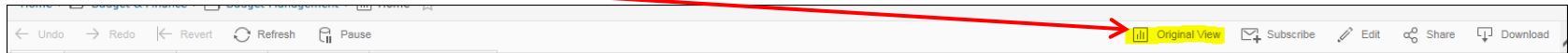
Printing the View: You can publish the view as a PDF file using the Print to PDF option. Select either Portrait or Landscape orientation and a paper size. You can choose whether to print the entire workbook, dashboard or certain sheets. If a dashboard extends beyond what you can see on your screen, printing the Dashboard will only show what you can see on the screen in the PDF. To see the entire dashboard in the PDF, the Sheets in Dashboard option should be chosen and the relevant worksheets selected



Custom Views

Custom Views: If you regularly look at certain workbooks and find you need to make the same changes each time you open the workbook, you can create custom views that "remember" your changes. Each time you open a custom view, it displays the information you want to see. You can then share custom views with other Tableau Server users who have permission to see the original view.

Open a workbook and make the changes you want to save. For example, modify filters, sorting, or zoom level. Click *Original View on the toolbar and enter a name for your custom view



Enter a name for this view. If you want this to be your default view check the "Make it my default" box. Don't forget to Save.

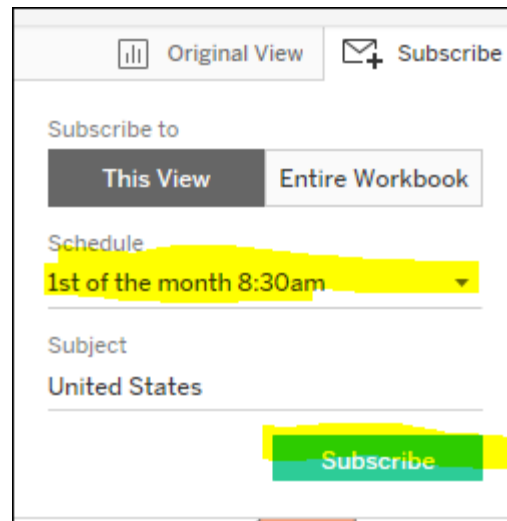
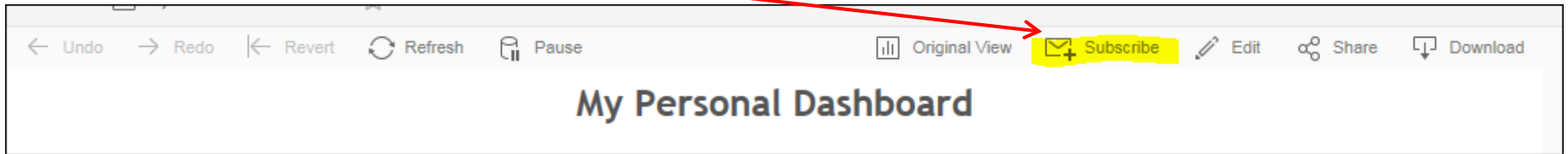
Your custom view is always displayed with the saved changes. Click a different view in the list to display it. The currently selected view is indicated by a gray background

Your custom view does not change the original, but is related to it. If the original view is updated or republished, your view is also updated. If the original view is deleted from the server, your custom view is also deleted.

Report Subscriptions

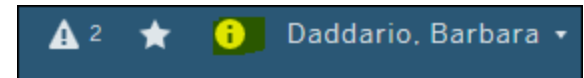
Subscriptions: Tableau Server will send an e-mail to your email address at regular intervals, always with the most recent data. Get all the important information you need, right in your inbox. If you do want to interact with the dashboard, you can click into the email to go to Report.

Open a workbook, and then click **Subscribe** in the toolbar in the upper right corner.



Help

When you are logged in to Tableau Server, there is a help link at the top right hand corner of the screen. This opens up a new window with more details that could help you get the answers that you need.



If this does not resolve your problem, and for any other difficulties with Tableau, please contact financereports@elist.tufts.edu

We welcome your feedback. For any questions, comments or requests for changes and enhancements, please contact financereports@elist.tufts.edu