

Analytics Open Labs

September 16, 2016

Sign In

Find Chris Thuringer and tell him your link blue id!

We are now using Tagger to track attendance at Open Labs.

Slide decks will be sent to all Open Lab attendees after each session.

Please be sure to sign in each session in order to receive the slide decks.

Open Labs schedule

9:00 AM - This will remain beginner hour presentation and one-on-one analyst sessions

9:30 AM - We will have a presentation targeted at 'consumers' that covers data available on the IRAA website and Tableau Server. You all are more than welcome if it is a topic you are interested in. Depending on turnout, we may be able to keep the rooms separated during the 9:30 session so conversation/analyst sessions can continue.

10:00 AM - We will have a presentation targeted at 'creators' that covers a variety of topics. I am hoping that these presentations last 20 to 30 minutes to allow time for questions on other topics and collaboration after.

Presentations will be announced 4 to 6 weeks out. This is to allow for flexibility in what is covered.

<http://www.uky.edu/iraa/hana-and-tableau-training>

Fall 2016 Analytics Open Labs

9/16/16

9:30 AM - What can be done in Tableau Server vs Tableau Desktop (Craig)

10:00 AM - How to get people in your college to adopt self service (Heidi Hiemstra - College of Nursing)

10/7/16

9:30 AM - Students in my college: How do I count them (Mary Kathryn and Craig)

10:00 AM - IRAA development cycle: What is in STUDENT_TEST these days (Mary Kathryn and Craig)

10/21/16

9:30 AM – Primary Instructors: courses taught, student credit hours, and other metrics (IRAA Team)

10:00 AM – Data governance and usage guidelines; HANA and Tableau permissions; data security issues (IRAA team)

<http://www.uky.edu/iraa/hana-and-tableau-training>

Send suggestions for additional topics to analytics@uky.edu

Tableau v10.0

Tableau Server was upgraded to v10.0 on Tuesday.

It is recommended but not required that Tableau Desktop users upgrade to v10.0.

- Older versions of Tableau Desktop:
 - CAN publish to Tableau Server
 - CAN NOT edit workbooks created or modified in Tableau Desktop v10.0

To upgrade, just download install the latest version of Tableau Desktop from www.tableau.com or <http://www.tableau.com/support/esdalt>. It should be quick and painless!

Tableau Server & Desktop v10.0 - New Features

Most users will only notice superficial updates on both Server and Desktop - new fonts, stylings, etc.

Mac users can connect directly to HANA! Alex Dixon has created step-by-step instructions, available on IRAA website: <http://www.uky.edu/iraa/resources-support>

Student Reports Detail Project

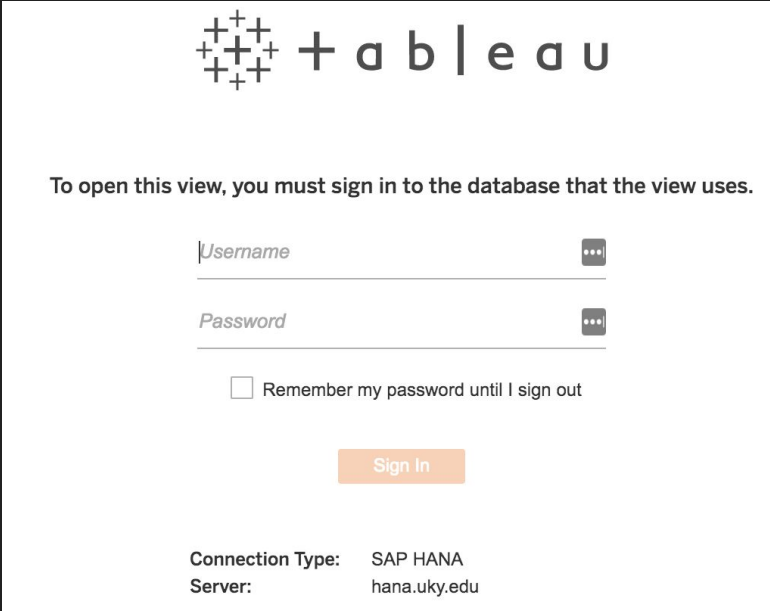
Most workbooks in Student Reports Detail now contain a “Student Detail” worksheet with identifying info.

- Retention Dashboard
 - Student Reports now only has 3 worksheets with the basic numbers
 - The many additional worksheets are still available in Student Reports Detail

Tableau Server v10.0 - Workbook Connection Issues

A lot of workbooks have been getting this error/login screen.

Alex Dixon has the solution!



The image shows a Tableau login screen with the following elements:

- Tableau logo at the top center.
- Message: "To open this view, you must sign in to the database that the view uses."
- Username input field with a dropdown arrow.
- Password input field with a dropdown arrow.
- Checkbox: "Remember my password until I sign out" (unchecked).
- Orange "Sign in" button.
- Connection details at the bottom:
 - Connection Type: SAP HANA
 - Server: hana.uky.edu

Tableau Server - downloading data

- Any data available on a Tableau Server report can be downloaded to Excel.
 - 'Crosstab' is usually a better option than 'Data' - but try them out to see what you prefer!
- On a Dashboard, the 'Data' and 'Crosstab' options might be grayed out of the Download menu.
 - Simply click on the worksheet you want to get data from and the options should re-appear!
 - Because a Dashboard can have more than one worksheet with different data, Tableau doesn't know which data you want until you select a worksheet.

Menu found in upper right of Tableau Server

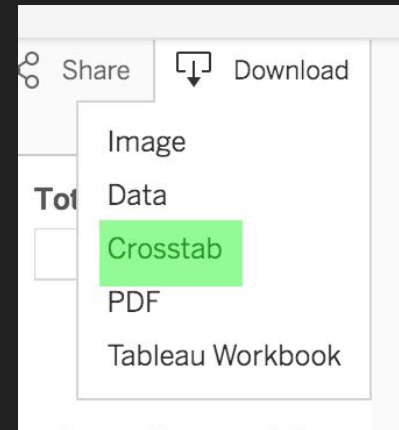


Tableau Server edit options

<http://kb.tableau.com/articles/knowledgebase/server-desktop-web-edit-differences>

Using Web Edit in Tableau Server

users who have **Web Edit** capability for a workbook can click the **Edit** menu to make changes to the view.

Tableau Training

Getting Started with Tableau Server (4 min)

<http://www.tableau.com/learn/tutorials/on-demand/getting-started-tableau-server>

Interacting with Content on Tableau Server (3 min)

Web Authoring (3 min)

<http://www.tableau.com/learn/tutorials/on-demand/web-authoring-server?signin=36dbc8144a9acd0351778d752fff8d0c>

What can you do in Tableau Server

- Create, edit, rename, duplicate, and clear sheets
- Connect to and blend published data sources.
- Edit workbook formatting.
- Use **Show Me** to create views.
- Change aggregation of measures in the view. Change the default aggregation of measures in the Data pane.
- View underlying data (via tooltips).
- Create and edit calculated fields.
- Create and edit table calculations, and use quick table calculations.
- Use the **Analytics** pane to drag reference lines, trend lines, and other objects into the view.
- Use data highlighting.
- Show labels, totals, and subtotals.
- Show and hide cards for captions, filters, and highlighters.
- Change the view size.
- Add, modify, and remove filters (shown as **Quick Filters**), and edit a quick filter layout. (**General**, **Wildcard**, **Condition**, and **Top** tabs are not available.)
- Filter across published data sources.
- Change the data type of fields.
- Duplicate, hide, or rename a field.
- Drag fields to different mark types in the **Marks** card.
- Convert a discrete field to continuous or vice versa. This option is available for measures and date dimensions.
- Show hidden fields, and remove fields from the view.
- Convert measures to dimensions or vice versa.
- Create groups by selecting marks in the view and then clicking Group Members (paperclip) in the tooltip for that selection.
- Use sets (not create).
- Use parameters (not create).
- Swap X and Y axes.

What can you NOT do in Tableau Server

General differences between web authoring and desktop authoring

- Web authors can create new workbooks only from data sources published to Tableau Server, and can connect to published data sources only.
- Data model editing is not supported on the server.
- Stories cannot be created or modified on the server.
- Actions from a right-click menu are not available for all items in the workspace.

Tableau Server Editing - Template Workbooks

The biggest limitation of Tableau Server is that you cannot create a new workbook.

You can edit an existing workbook.

Use the existing Student Reports as templates!

Tableau Server Editing - Copying and Overwriting Workbooks

For workbooks in IRAA projects (e.g., Student Reports, Student Reports Detail, Provost & Deans), you should **NOT** have permissions to overwrite workbooks!

For workbooks in your own College/Unit project, you **CAN** overwrite the workbook.

Most often use the “**Save As**” option to create a new copy of the workbook. You should be able to make a copy in your own College/Unit project.

Tableau Server Editing Summary

There are lots of useful things you can do to create and edit reports in Tableau Server (without buying a Desktop license)!

There are lots of detailed things you can **NOT** do to edit reports in Tableau Server.

If you're new to Tableau, try the web editing first until you outgrow it!