

UC San Diego

TABLEAU RESOURCE SHEET



Q: What is Tableau?

Tableau is a data visualization tool that helps make information from data sources (such as databases and spreadsheets) easy to analyze and understand through interactive and visually appealing dashboards. For more information, please visit tableau.com.

Q: What Do I Do with this Tool?

You can use this tool in a variety of ways. For example, for tracking, reporting, displaying and/or presenting your information in an interactive and comprehensible way. Consider brainstorming the types of questions you would like to answer and the type of information/data you have access to in order to develop data visualizations. For examples of well-executed data visualizations through Tableau, please visit: [Tableau's Data Viz Gallery](#).

Q: How Do I Gain Access to Data?

Depending on your unit, you may have access to various data repositories, including Excel, internal databases, and access to campus Data Warehouse data. Please speak to the appropriate person in your unit/AVC area to learn what data is available to you and how to gain access. Tableau can connect to most data files and has the ability to connect different data sources. For more information on connecting to data sources via Tableau, please visit: [Tableau Online Help: Connect to and Prepare Data](#).

Q: How Do I Get Access to Tableau?

You all have Active Directory permissions to access the Campus Tableau server with **publishing capability** (licensed users) or **reader/viewing capability** (non-licensed users). If you were not provided with a license by SATS/VCSA but would like one, please speak with the appropriate person in your unit/AVC area to receive funding. When you are ready to have a Tableau license installed in your office, submit a tech service request (TSR) to Student Affairs Technology Services (SATS).

Q: How Do I Publish a Dashboard?

You may publish your work via two servers:

- tableau.ucsd.edu (Production)
- tableau-qa.ucsd.edu (QA-draft mode)

The production server is meant for finalized dashboards/workbooks, whereas the QA server is meant for items in draft mode. When publishing, please remember to publish within your respective unit folder(s). Unless you would like to share your work across and outside of campus, please **do not publish to the Public folder**.

Q: What Resources are Available to Help Me with Tableau?

There are a wide of variety of resources available to help you learn how to use and master the software. Below are just several resources at your disposal:

- SATS User Communities | [Tableau User Community](#) (login in with your SSO username and password, select the 'SATS' tab on the upper left hand corner, and then scroll down to 'Tableau User Community' on your left hand corner)
- Training | [Free Tableau training videos](#)
- Listserve | 'Tableau-developer-L' listserv for Tableau users on campus
- Book | Learning Tableau 10 (Second Edition) by Joshua N. Milligan
- Blog-Post | [Your Guide to Become a Tableau Expert](#)
- Handbook | [Introduction to Learning Tableau](#)
- Handbook | [Designing Efficient Workbooks](#)

Q: Who Can I Contact for Further Help with Tableau?

- For service requests regarding viewing permissions for you and/or colleague within a particular department, please submit a [tech service request \(TSR\)](#) to SATS.
- For assistance and customer support with the Tableau software, please contact Business Intelligence from ITS at: busintel@ucsd.edu

In the near future, we would like to connect all Tableau users within Student Affairs to share and collaborate. Please stay tuned!

For questions regarding this resource sheet, and/or to contribute to our working list of Tableau resources, please contact UC San Diego Student Affairs Assessment at sa-assessment@ucsd.edu.