
Overview

Tableau is a dynamic, interactive reporting, business intelligence, data visualization software tool produced by **Tableau** Software. This type of software is used primarily for analysis, prediction and forecasting through the use of interactive visualization via charts, graphs, and other analytic tools – allowing a larger audience to find answers in data.

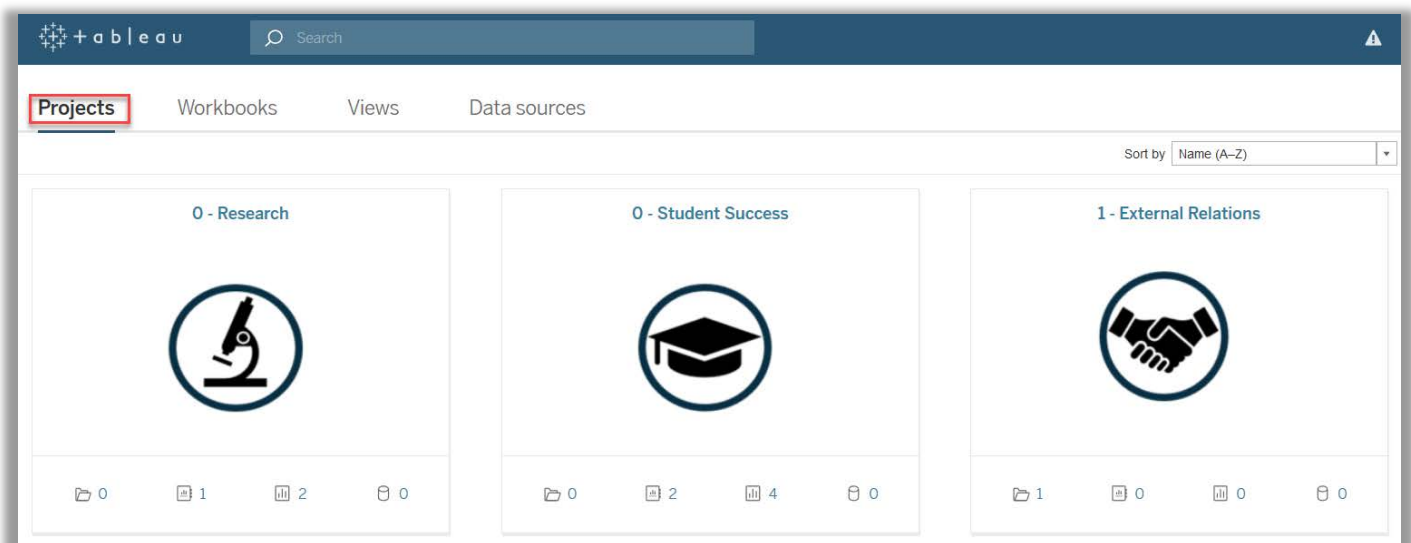
The intention of this document is to serve as a supplemental aid in navigating Tableau. Tableau uses unique verbiage introduced in this document. The **Helpful Links** document provides a link to the Tableau Glossary for additional definitions.

Landing Page Tabs

The main page includes the **Projects**, **Workbooks**, **Views**, or **Data Sources** menus. As you click these options, each page shows related content you can access.

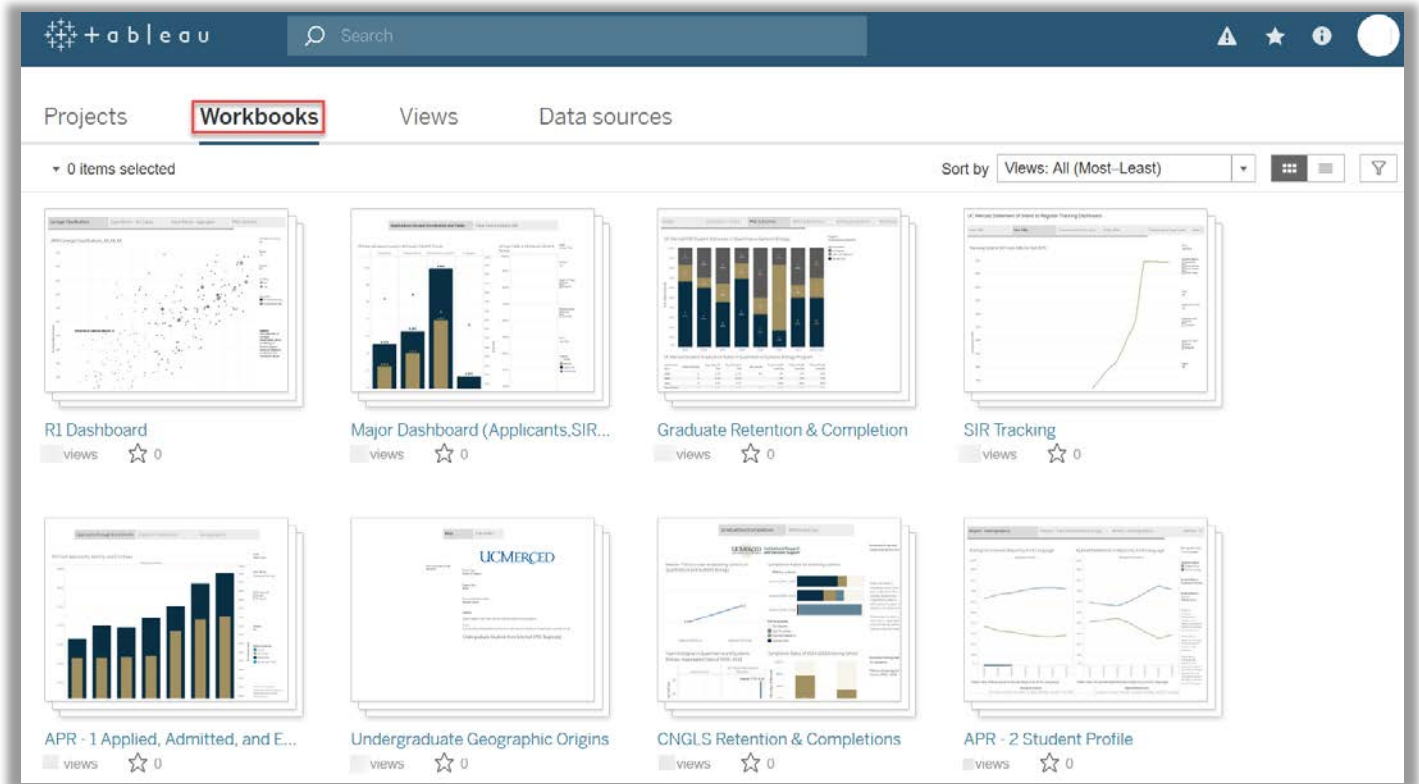
Projects

The **Projects** tab presents the User with the available projects. A **Project** is a folder including the Workbooks, Views, and Data sources in that project.



Workbooks

A **Workbook** is a group of similar Tableau Stories (individual reports). **Workbooks** allows the User to view all workbooks unsorted from the Projects. This feature may be helpful when the User does not know the name of the Project where the Workbook is located.



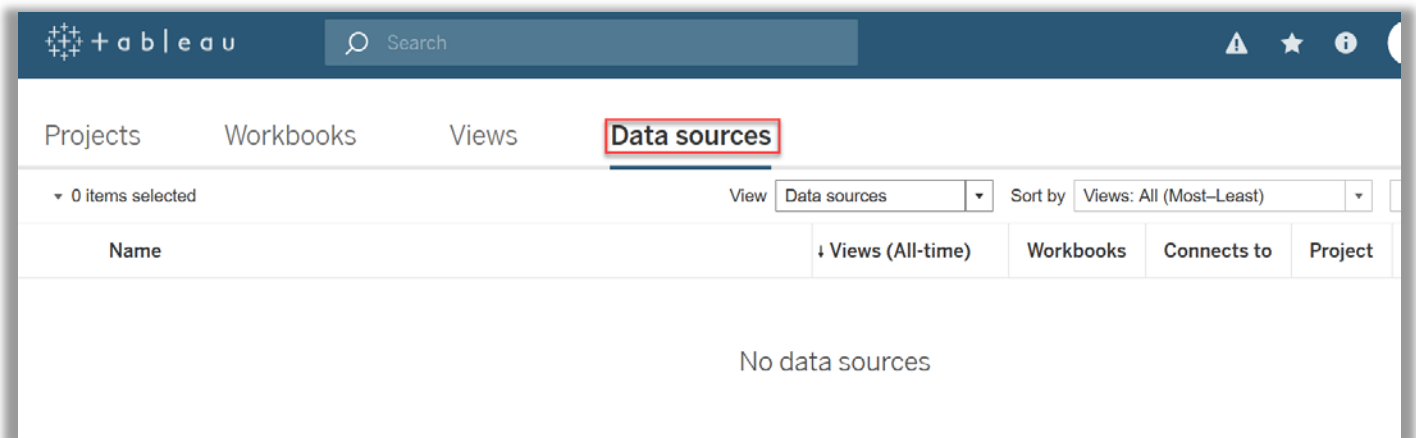
Views

Views are located within Workbooks and are the Tableau Stories. **Views** present all stories available in one place.



Data Sources

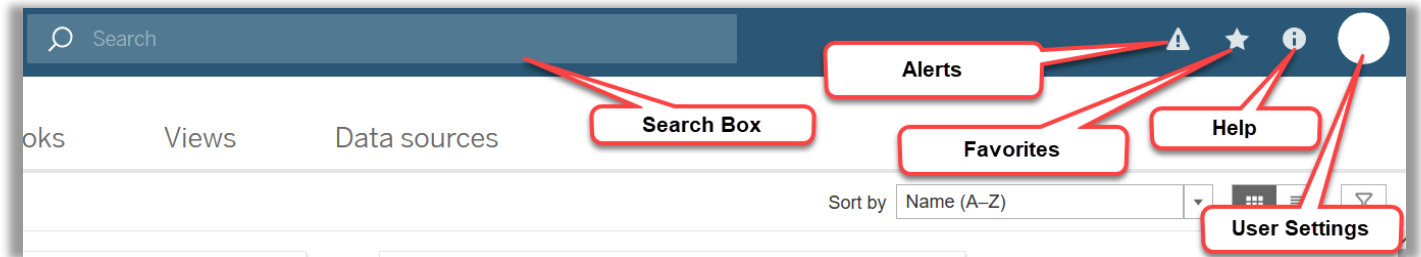
A **Data Source** is the source of the data used for the Tableau Story (report).



Note: The data is not downloadable, but it is the source file that the Tableau Story is built with.

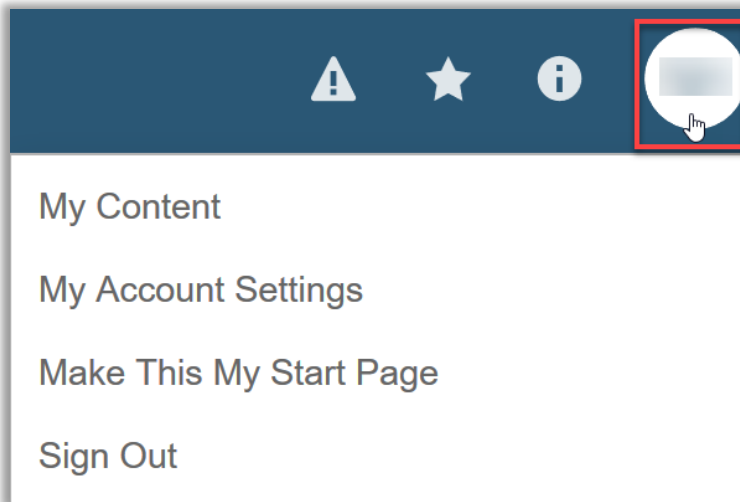
Landing Page Quick Access Icons

The landing page contains quick access icons for the User's convenience.



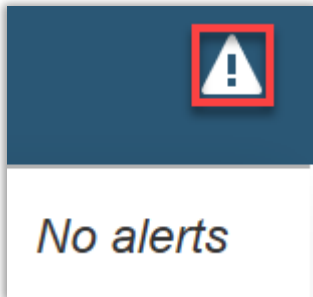
User Setting

Clicking the circle with the User's initials will display the User's setting menu. This menu has different options for Users including the ability to access subscriptions.

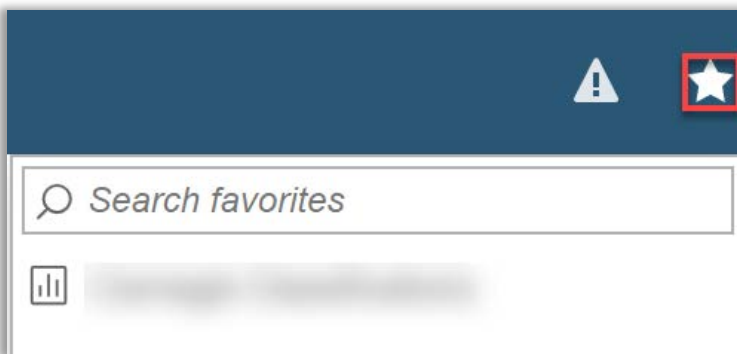


- **My Content** allows Users to access Stories to which they have subscribed.
- **My Account Settings** allows Users to change their display name, email address, language and email notifications.
- **Make This My Start Page** Changes the start page of the website to a page of the User's choice.
- **Sign Out** Signs the User out of the system.

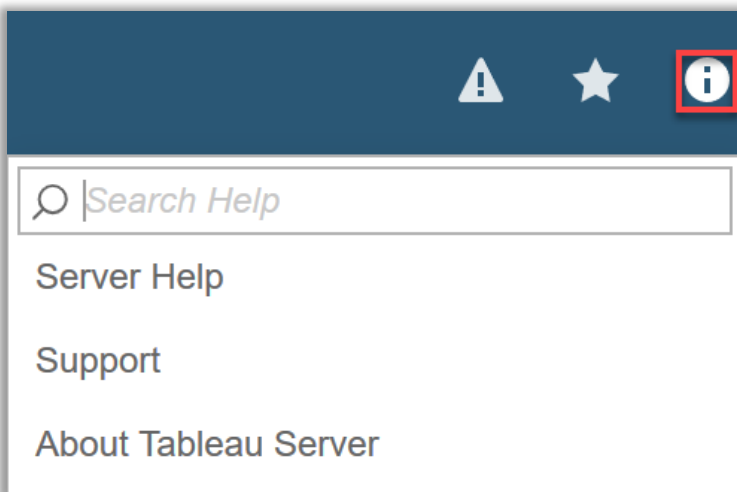
Selecting the triangle with the “!”, or **Alert** icon will display alerts regarding the server’s capacity. This feature is for Tableau Administrators.



Selecting the Star, or **Favorites** icon will display the User’s list of favorite Stories and provides an option to search the User’s favorites list.



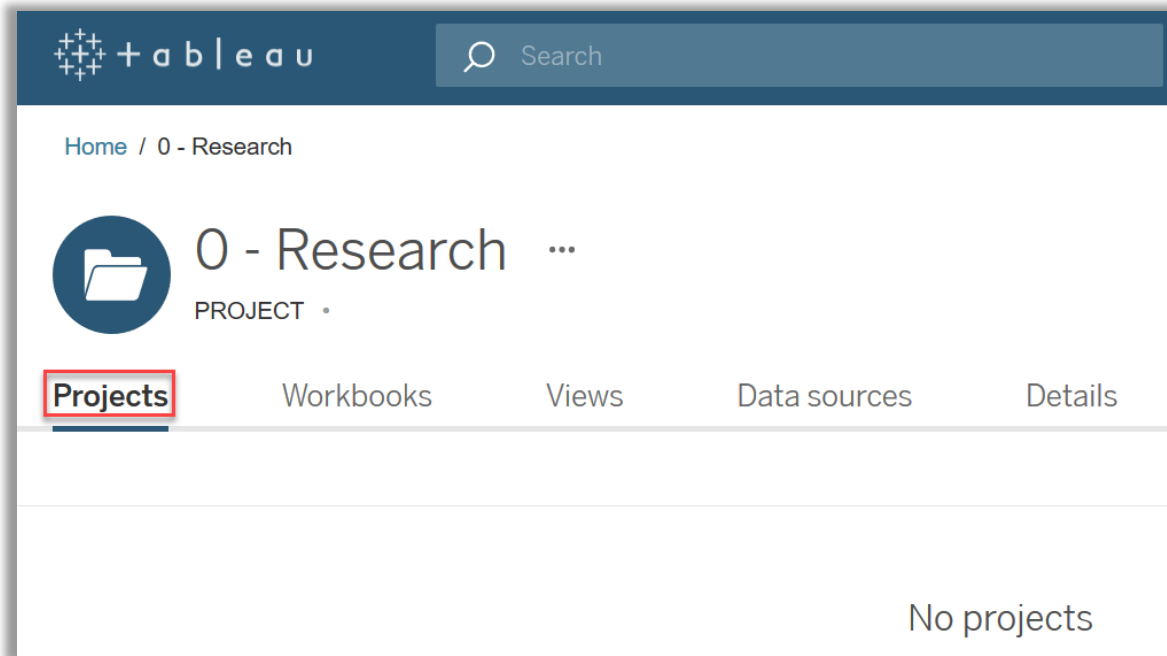
Selecting the circle with the “i”, or **Information** icon will display options to search Tableau’s Help topics.



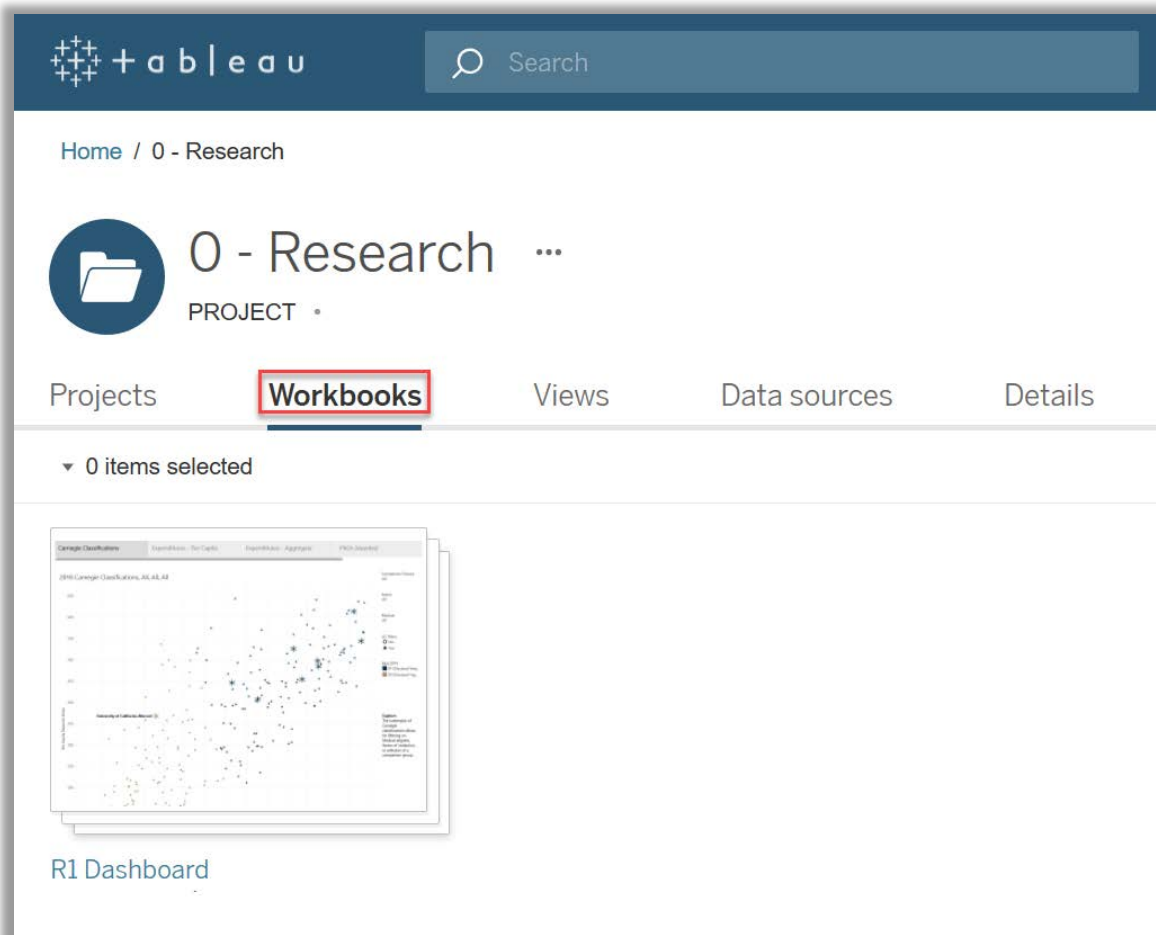
Project Tabs

Within the Project (folder) are tabs that organize the Stories (reports).

The **Projects** tab will display any sub Projects (folder within a folder).



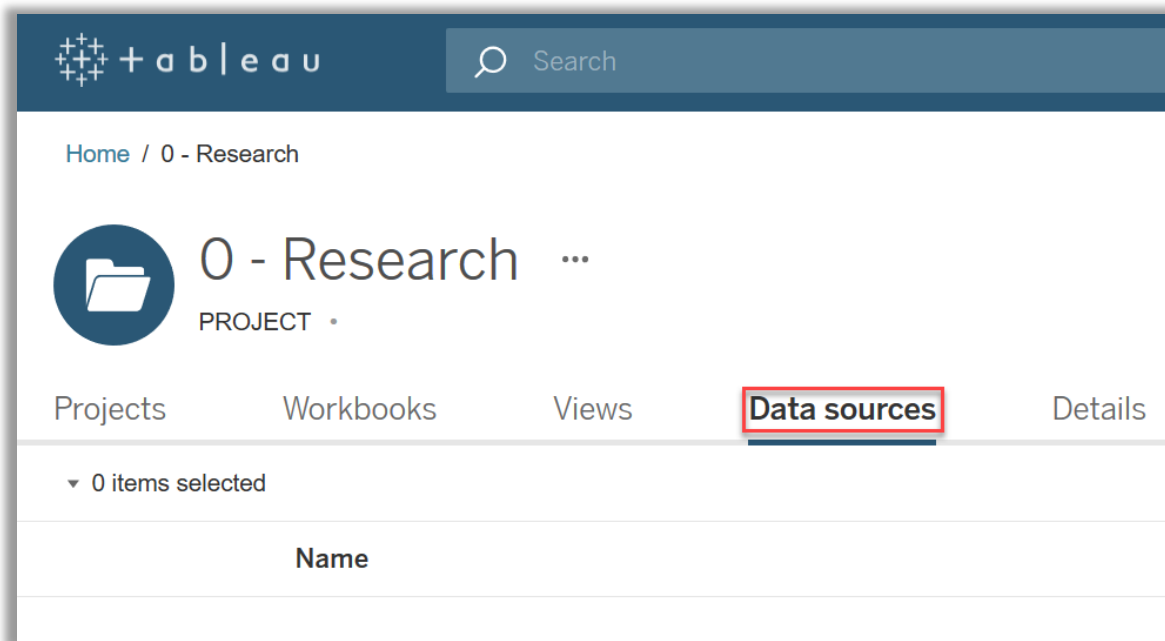
The **Workbooks** tab displays the Workbooks within the selected Project.



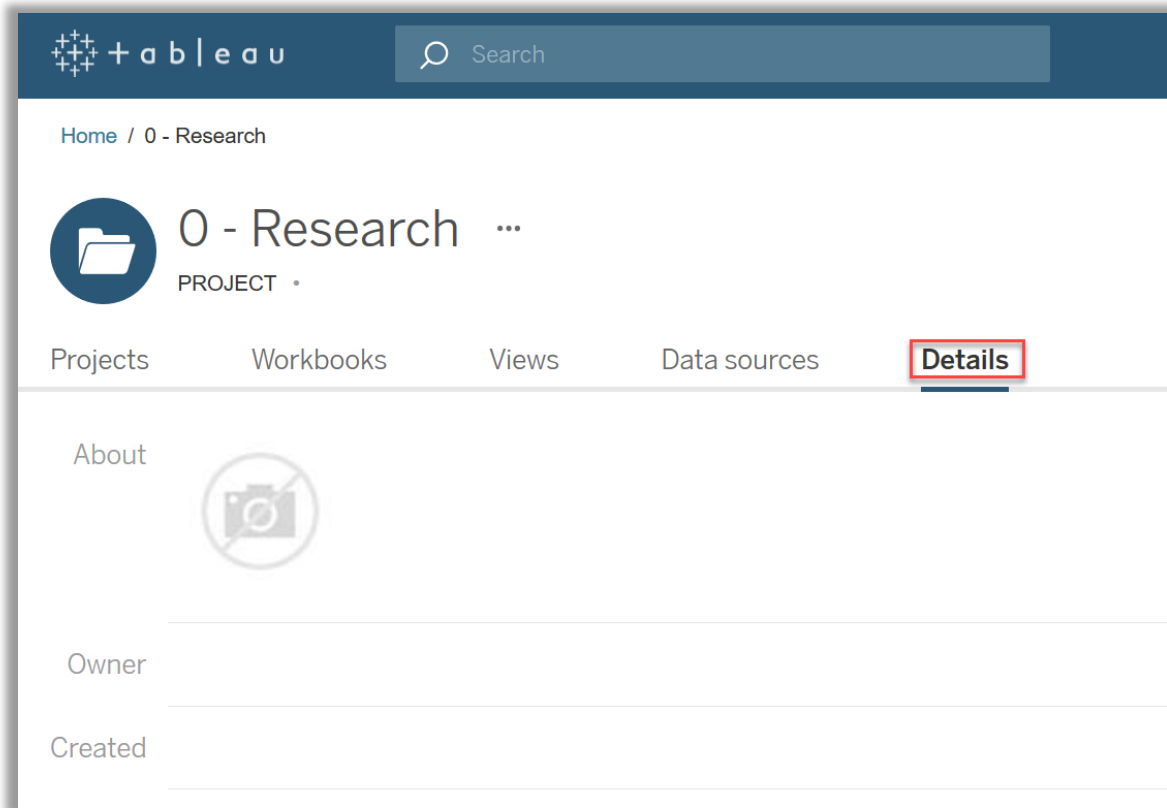
The **Views** tab will display the various Views included in the Project selected.

The screenshot shows the Tableau interface for a project named "0 - Research". At the top, there is a dark blue header with the Tableau logo and a search bar. Below the header, the breadcrumb "Home / 0 - Research" is visible. The main content area features a folder icon and the text "0 - Research PROJECT". Below this, there are four tabs: "Projects", "Workbooks", "Views" (which is highlighted with a red box), and "Data sources". Under the "Views" tab, it says "0 items selected". Two preview cards are shown below, each displaying a scatter plot. The first card is titled "Carnegie Classifications" and shows a scatter plot with a legend on the right. The second card is titled "Carnegie Scenarios" and shows a similar scatter plot with a legend on the right.

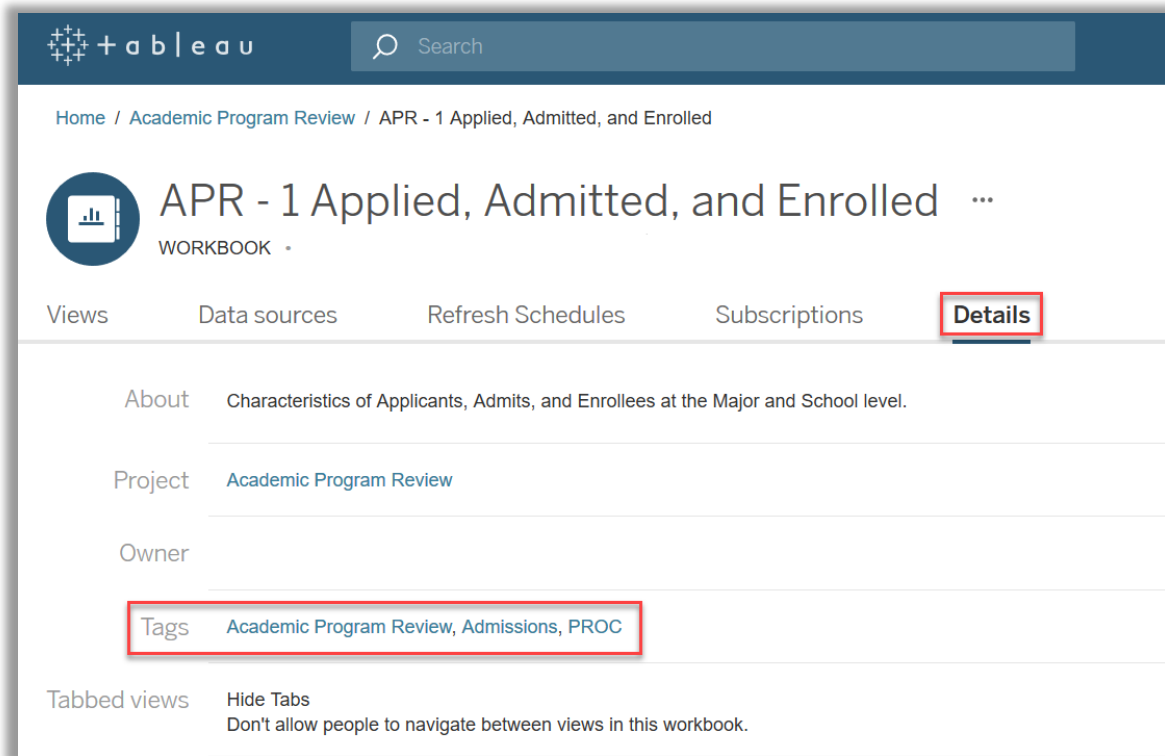
The **Data sources** tab will display the data sources for the Project selected.



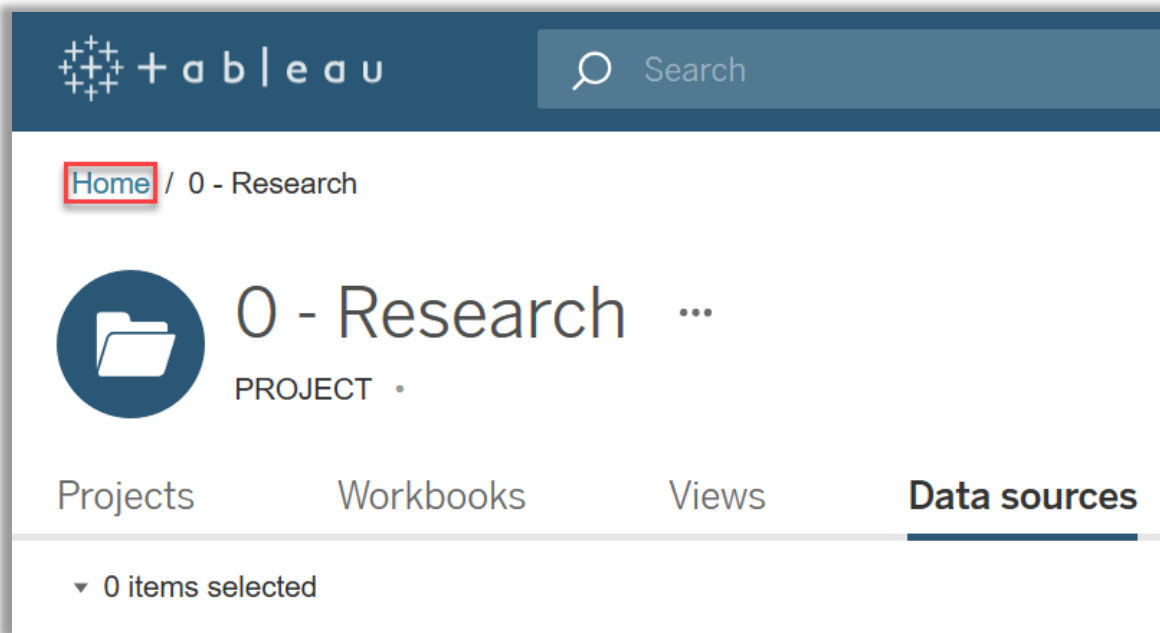
The **Details** tab will display the details of the Project including the Owner of the Project and the date the Project was created.



When selected in the Workbook, the **Details** tab will display the details of the Workbook similar to the details of the Project, but with added information regarding the tags of the Workbook.

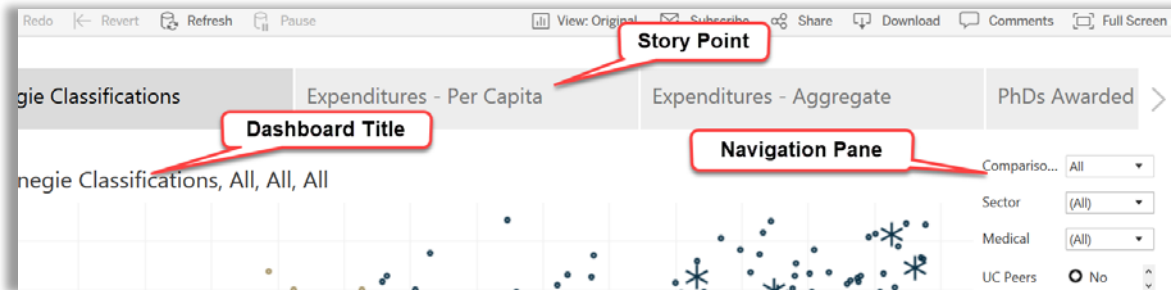


Anywhere within Tableau, selecting **Home** will direct the User back to the home page.

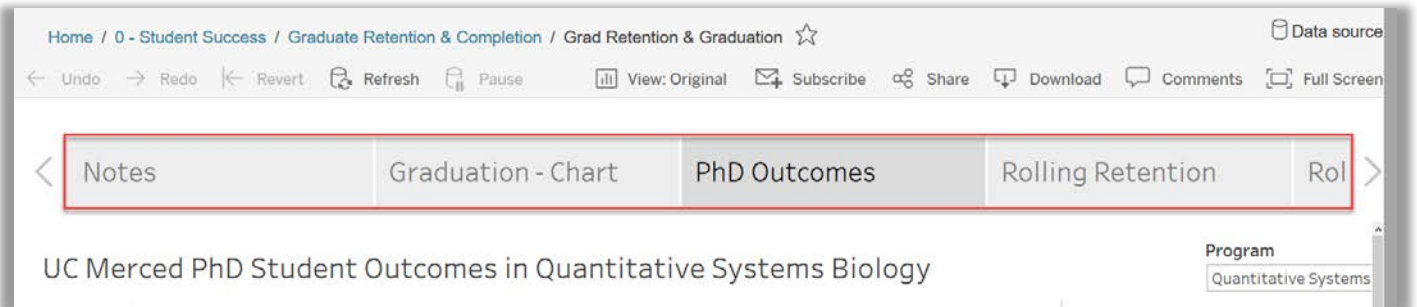


Viewing the Stories

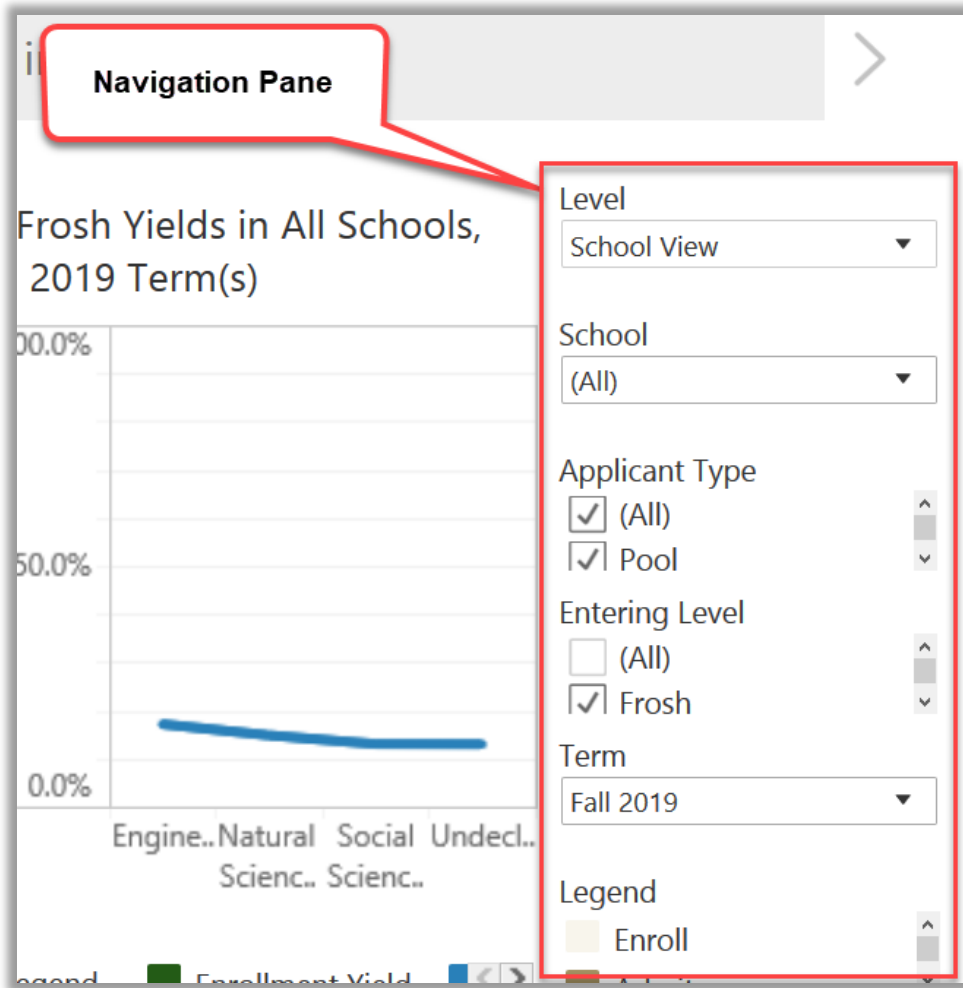
Each Story presents different options to view the data presented. These options are available via the **Story Points**. The **Navigation Pane** allows Users to filter and hone in the data.



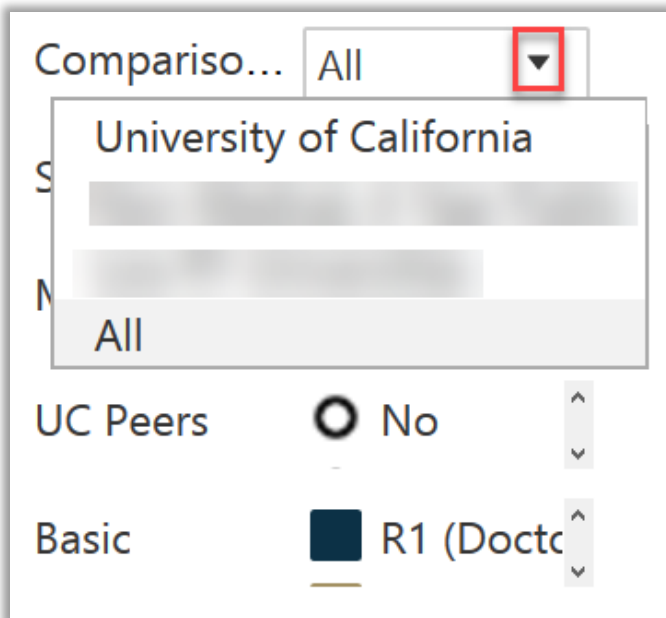
The various **Story Points**, or tabs, allow the User to change the Story displayed. A Story Point captures a particular point, selecting the desired **Story Point** will present the Story described.



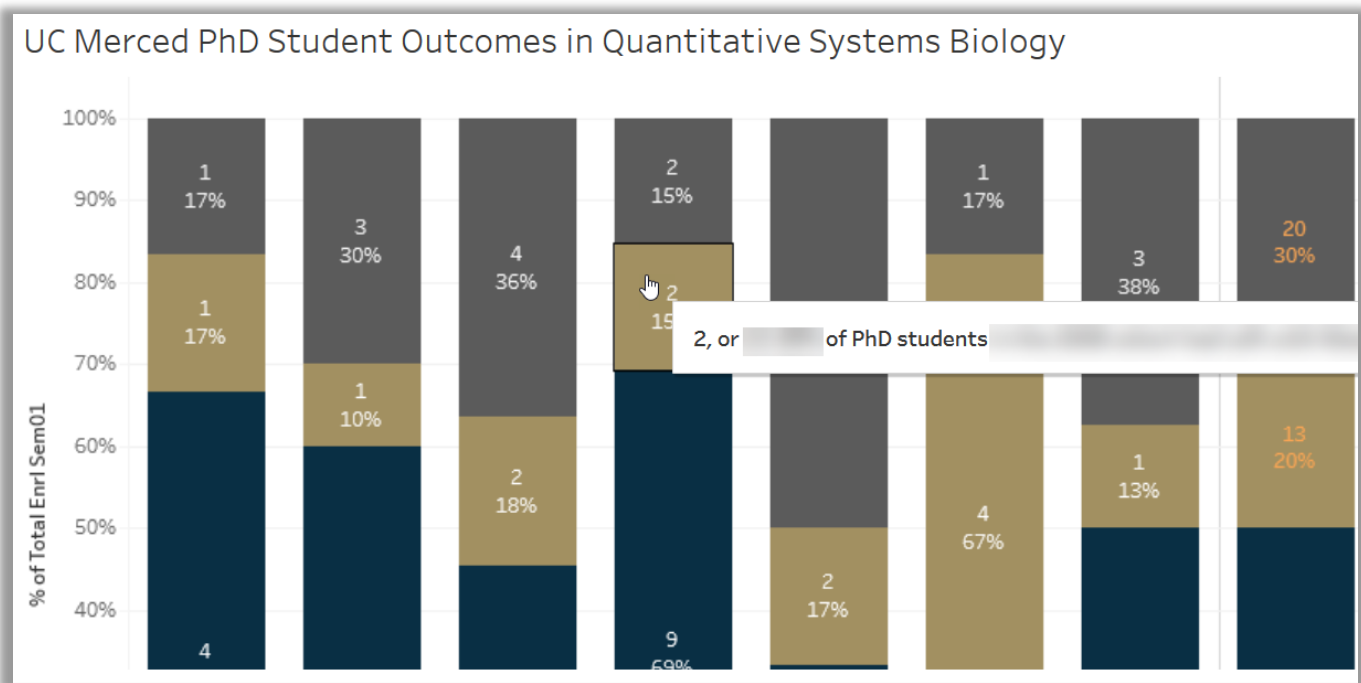
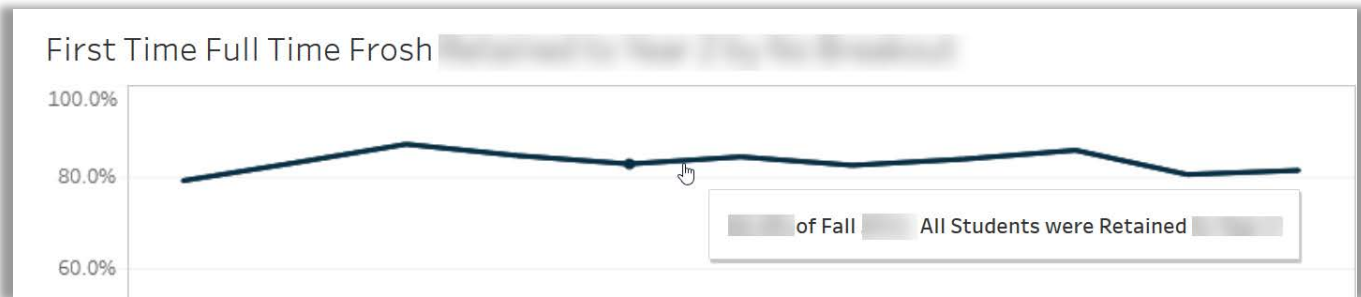
The **Navigation Pane** presents different options for filtering and honing the data. The options in the pane vary depending on the Story.



The drop downs in the Navigation Pane will provide the filtering options available for each section.



Hovering over the chart illustration, or data, will display a dialog box explaining the information provided within that specific illustration.



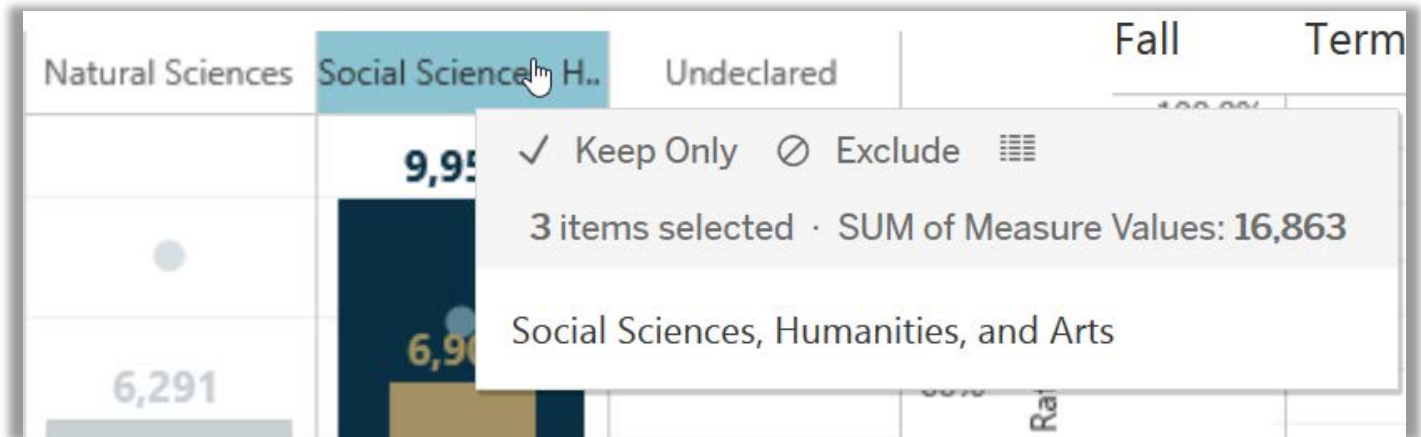
UC Merced Student Graduation Rates in Quantitative Systems Biology Program

Cohort Year Num	Cohort Size (N)	Avg. Years To Phd	Avg. Terms To Phd	4 or Less %	5 Years % (All cohorts)	6 Years % (All cohorts)	7 Years % (All cohorts)
1	12	6.00	11.75	8%	8%	17%	33%
2	6	5.00	10.00		17%	17%	17%
3	8				50%	50%	50%
Grand Total	26			4%	23%	27%	35%

Cohort Year Num: 2
 Avg. Years To Phd: 5.00

Note: Dashboard Titles will also populate with selections made in the navigation pane to orient the user to the information in the visual.

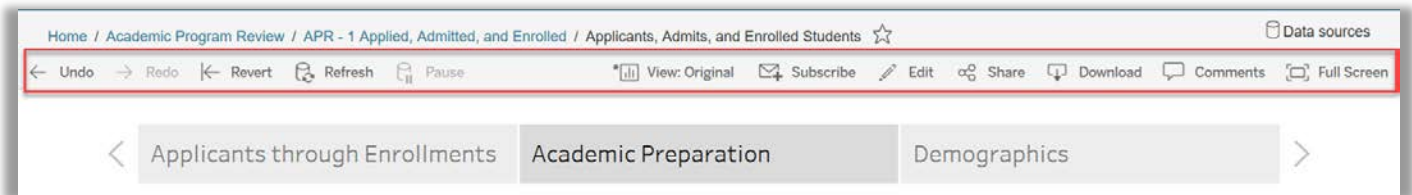
Clicking on a column header will display options available to that specific column. The option to **Keep Only** will only display the data for that column. The option to **Exclude** will exclude the selected column and will only display the other columns. The **Items Selected** displays the number of items (types of data) in the selected column. The **SUM of Measure Values** displays the total number of data in the selected column.



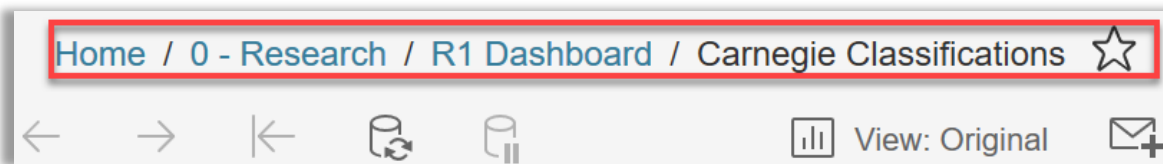
Note: Clicking the revert or undo button will undo the "Keep Only" or "Exclude" action, returning the Story to the original view.

Story Menu Options

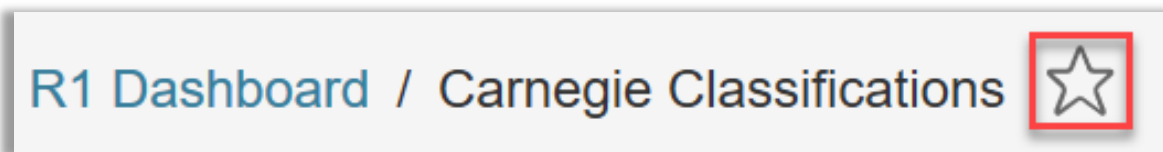
Above the Story Points are options that can be utilized while viewing the Stories. For detailed information on the functionality of the icons refer to the **Icon Glossary**.



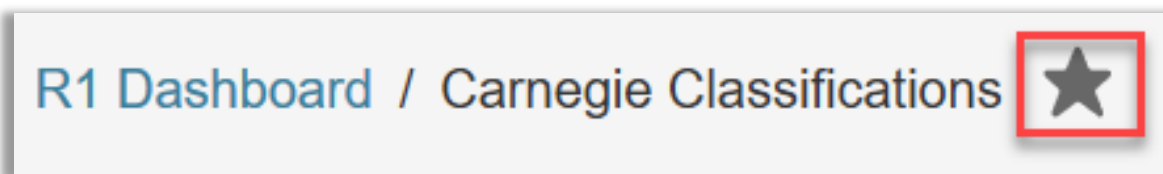
The breadcrumbs can be utilized to navigate back through the Project or to the home screen.



Clicking the star next to the Story title will add the Story to the User's favorites.



When the Story is marked as a favorite, the star will become solid.



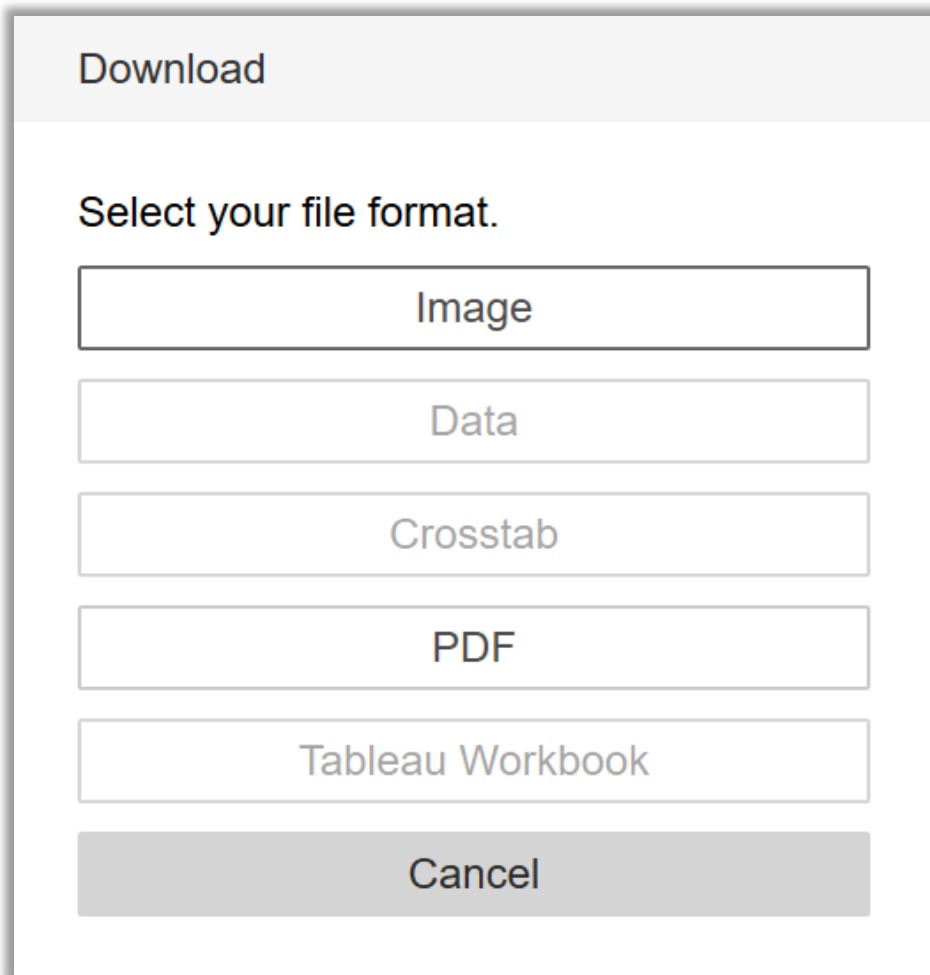
Downloading Stories

Stories can be downloaded for sharing or saving.

Selecting **Download** allows the User to export the Story, either as an image or PDF.

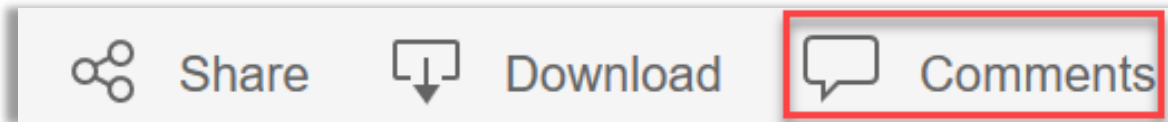


After selecting **Download**, a popup menu will display allowing Users to select the desired format. Selecting **Image** downloads what the screen is currently displaying, much like a screenshot. Selecting **PDF** will download the entire Story.

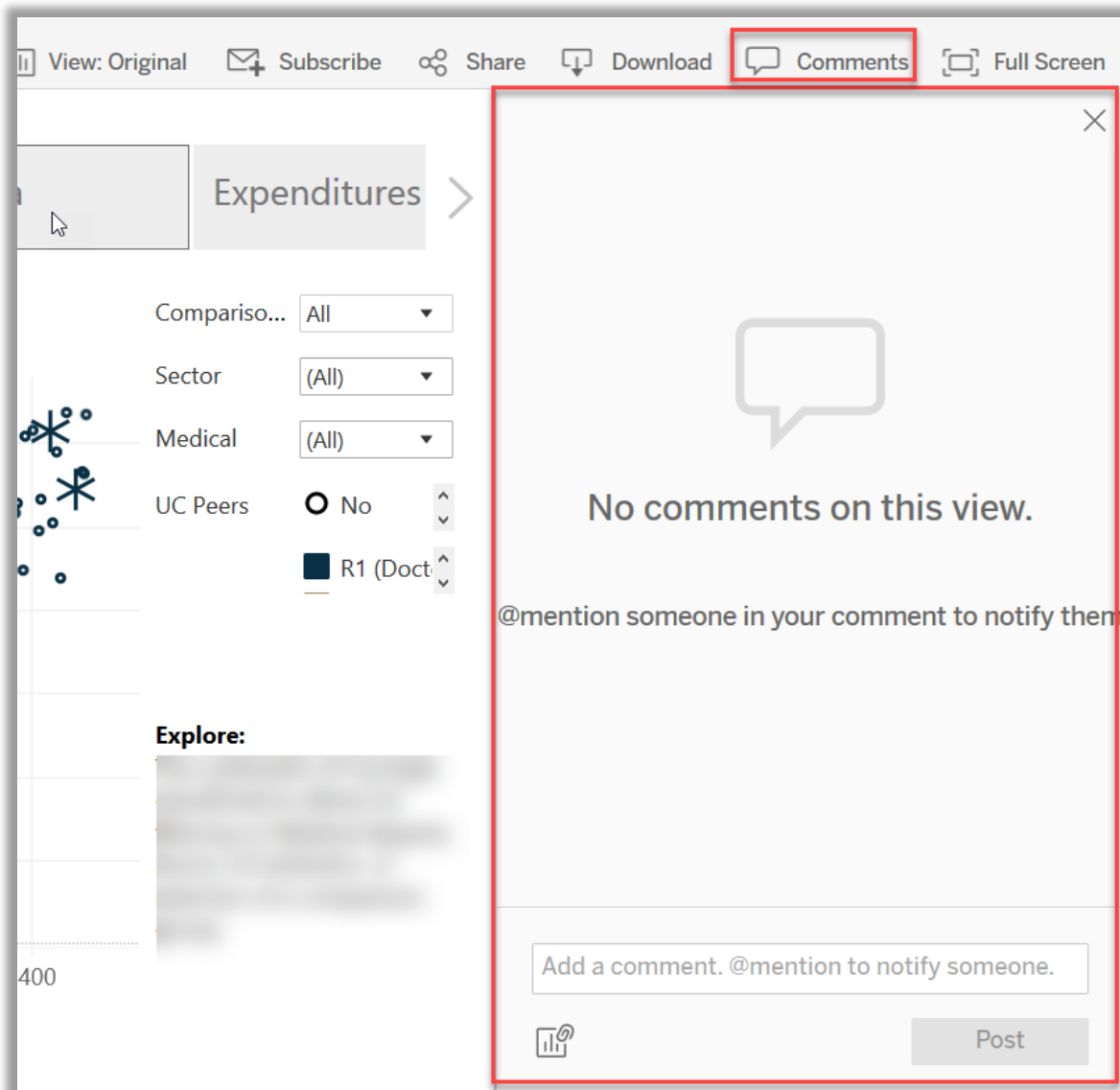


Commenting on Stories

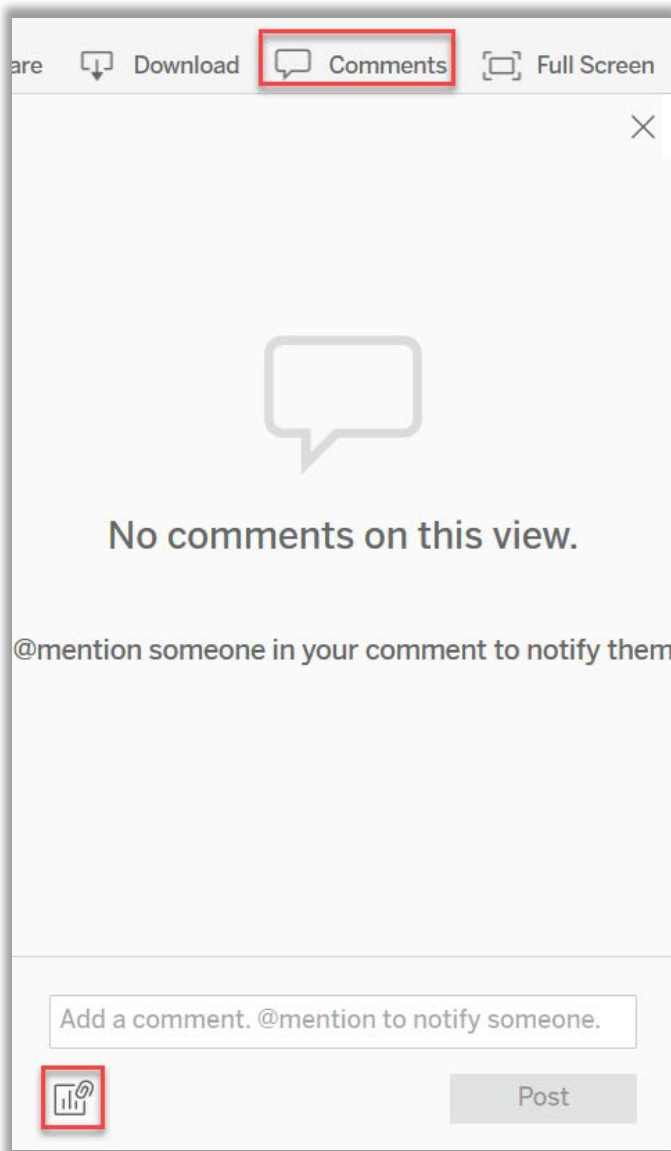
Selecting **Comments** opens a side panel for Users to comment on Stories.



Other Users provisioned access to the content can be mentioned with @Username formatting.



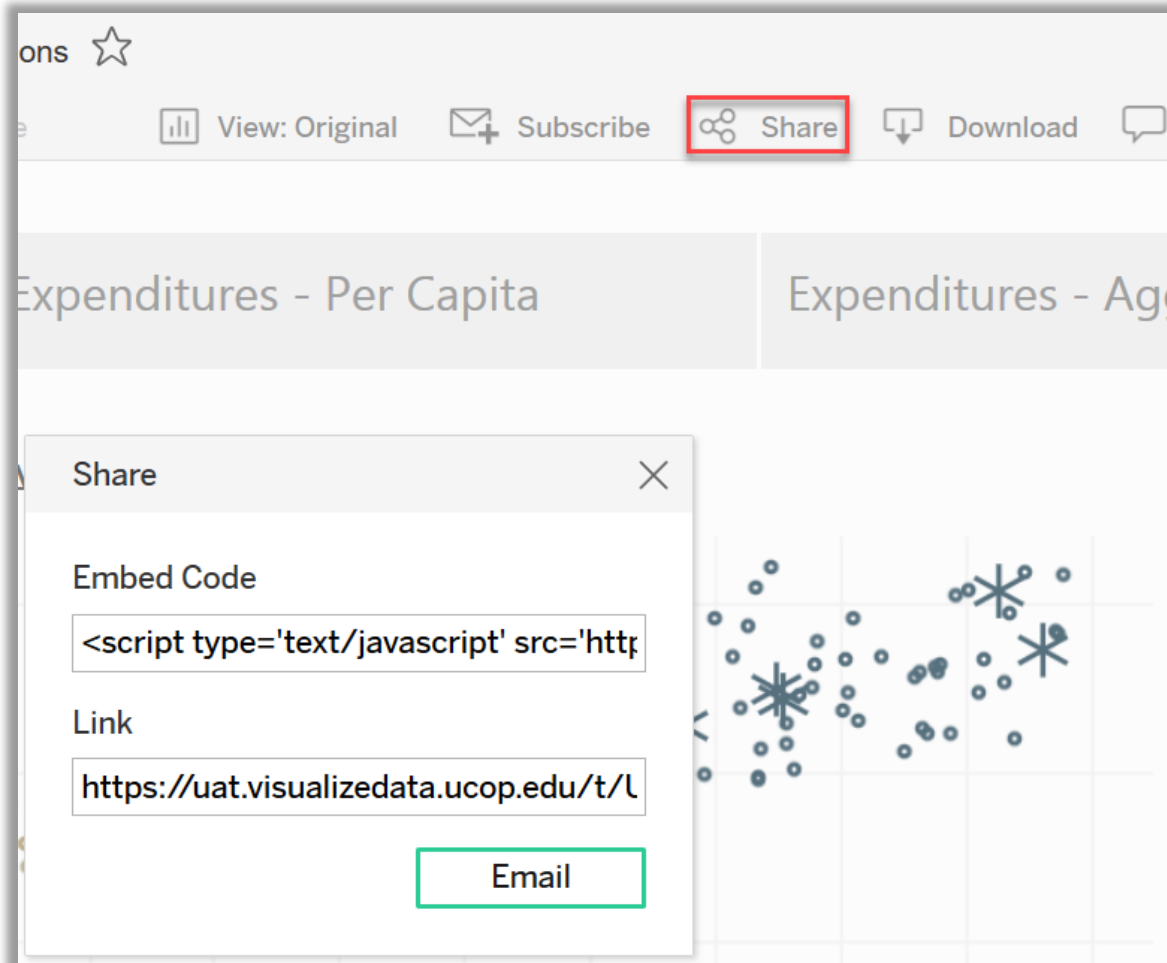
Selecting the attachment icon at the bottom of the Comments pane adds a snapshot of the Story to the comment.



Sharing Stories

Stories are also able to be shared with other Tableau Users by selecting the Share option.

Selecting **Share** provides a pop up that allows Users to share the Story (with those who have the same access provisioning) either by embedded code or via a direct link.



Note: Sharing will only work for other Users provisioned access to the content.

Signing Out

To sign out of Tableau click on the User Settings and click **Sign Out**.

