Drexel's Tableau Data Visualization Platform Quick Guide

Tableau is Drexel's platform for visualizing data and analysis to support decision-making. If you are a Drexel employee (faculty or staff) with a need to access administrative data resources, you may request a free license to access Tableau by contacting anyone in the Office of Institutional Research. Currently all academic department heads, Deans, and many administrative leaders and offices have licenses to use Tableau.
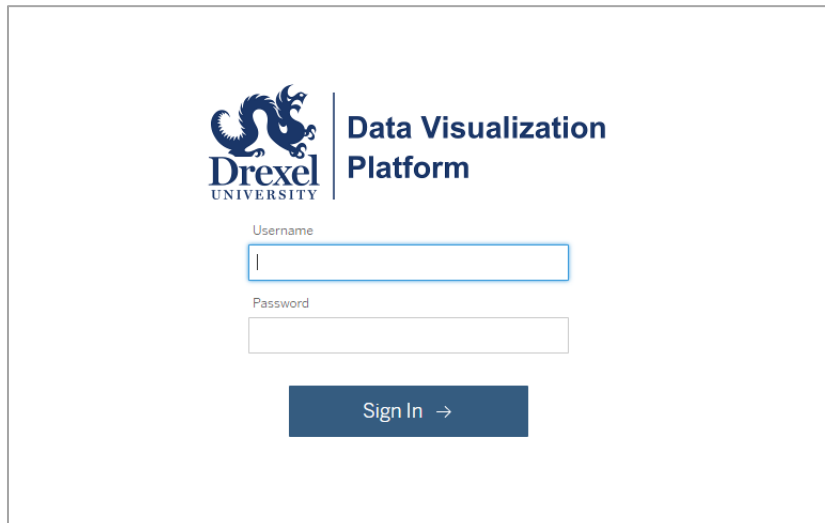
With Tableau access, you can explore, interact with, download, and share published views.

In this quick guide, you will learn how to navigate the platform and use common features.

- Enter in **viz.drexel.edu** in the address bar or use this link: https://viz.drexel.edu/

Login Screen

- Enter in your Drexel One username and password and login

Home Page – View recently opened, favorites, and recommendations

Explore Page – See all the content you have access to

- Content is shown in a hierarchical structure that can be navigated like the file system on your computer.

- Search – Search box at the top of the page can be used to type in keywords and find matching items such as views, workbooks, and projects

Projects – Used to organize the content.

- Projects can contain other (nested) projects in them.
- When you click a project, you will see all the content within it, including nested projects.
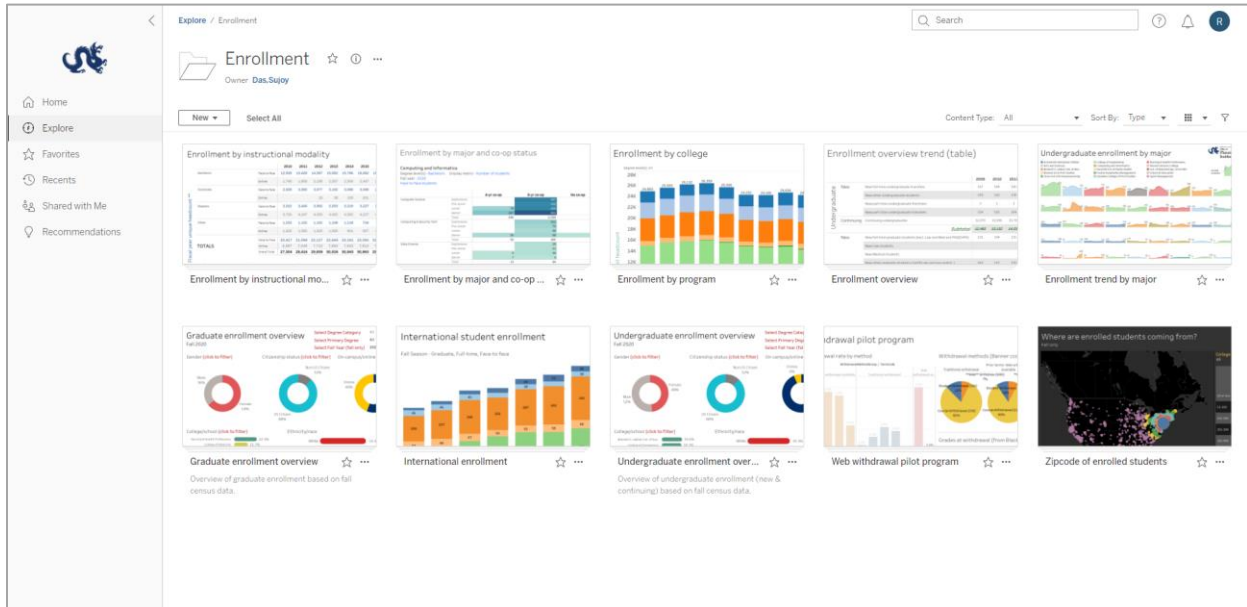
Workbooks

- Shows the views included in the workbook

Views

- Options are displayed in the toolbar at the top for interacting with the view
- Filter data – Filters allow you to limit visible data to specific ranges, regions, and categories
    - There may or may not be filters in the visualization that you can use to get the visualization you want.
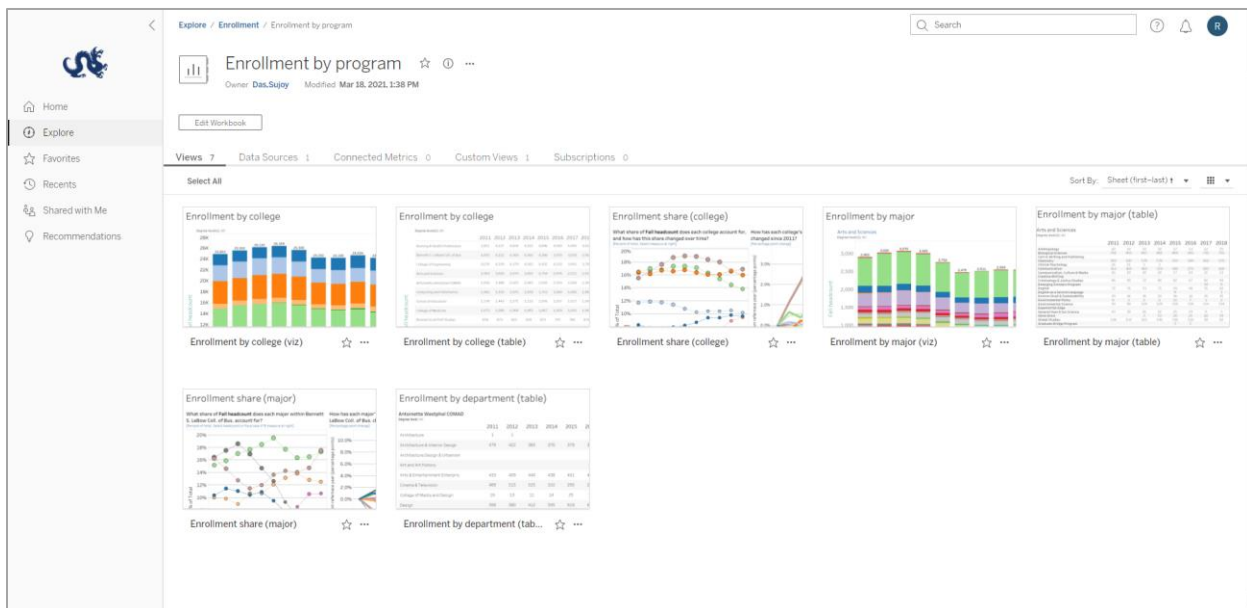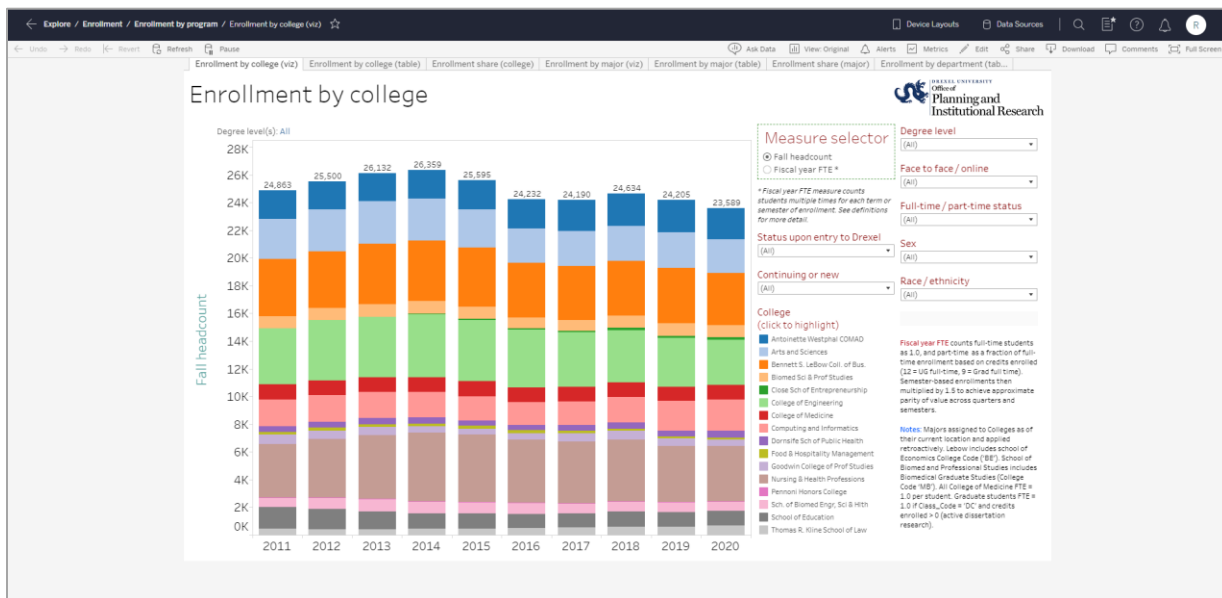   - Filters can come in many different types such as dropdowns, sliders, lists, etc.
- Hovering your mouse over the view's data points can reveal tooltips
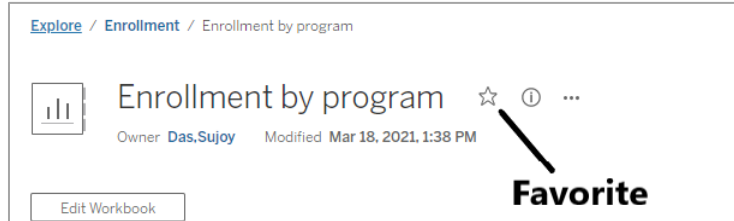
Note: Interacting with a view, using filters/sorting, simply changes how it looks for the moment. The view will always revert the next time you go to it, so feel free to interact!
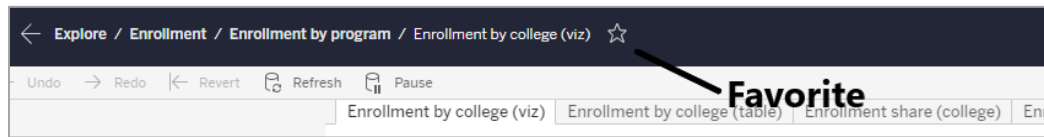
Favorites

- You can favorite a workbook or a view to easily find data important to you
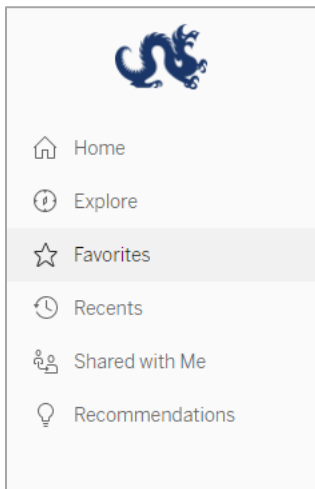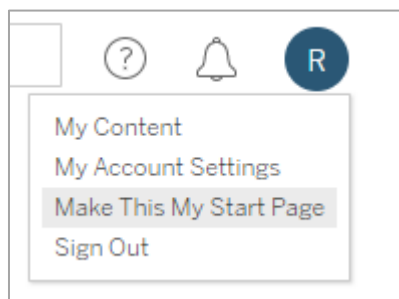 - **Workbook:**

  - **View:**

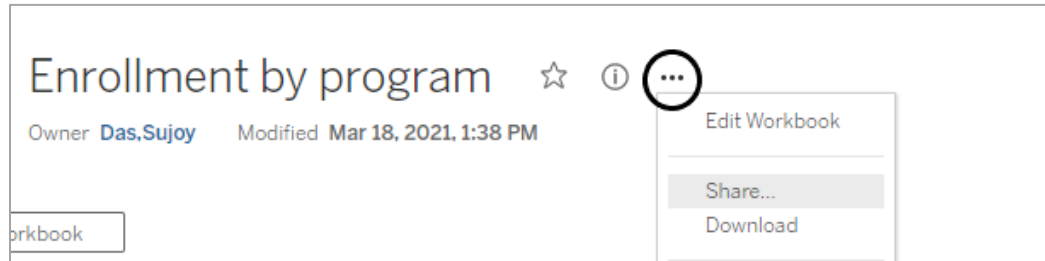- To access your favorited workbooks and views, go to the Favorites page from the navigation menu

- You can also set the Favorites page to be the starting page when you login to the site
  - Click on the top right button for your content and account settings and hit "Make This My Start Page"

Sharing

- Share: projects, workbooks, and views
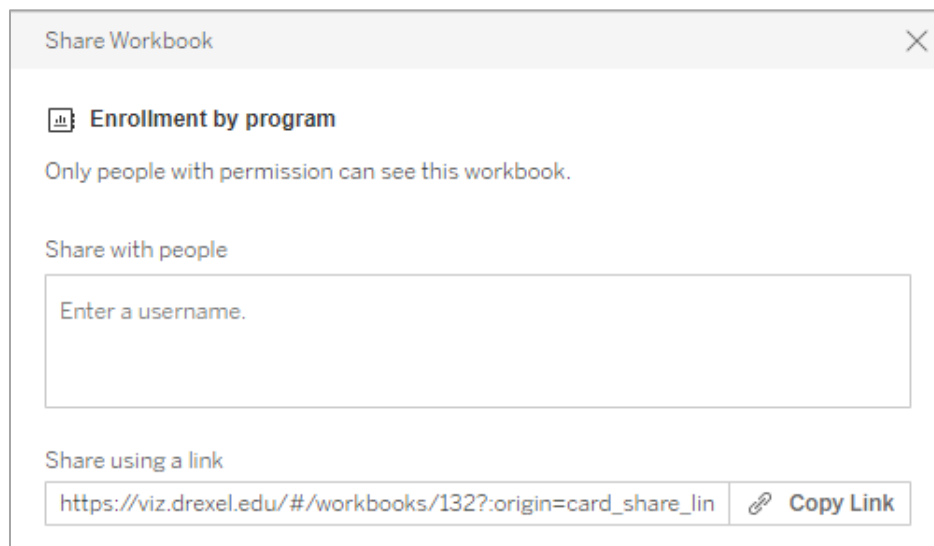 - **Workbook:**

  - **View:**
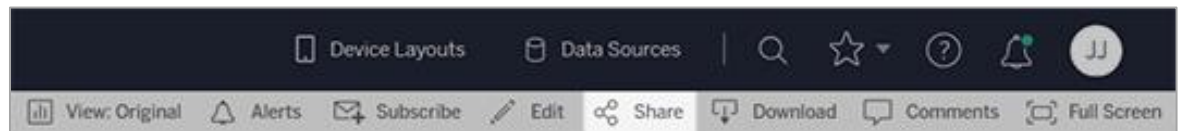
Note: If you want to share a specific view with filters/sorts applied to other users, you can do that by applying the filters/sorting first in the view and then sharing.

- Options for sharing:
  - Share by entering your colleagues' usernames
  - Share by using a link

    Note: Sharing can only be done with users who have access to Tableau
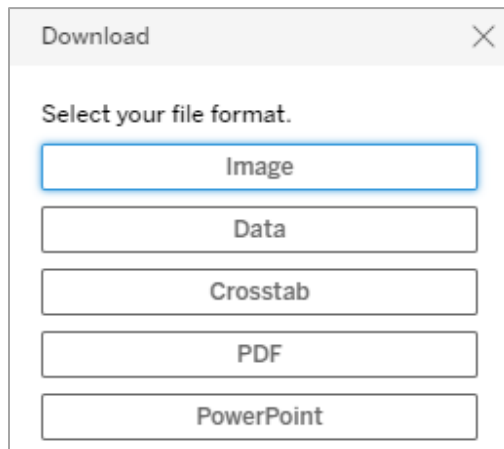
Downloading

- Download: workbooks and views

- Once you hit download, choose the file format you want to download.

- Download File Formats Available to viewers
    - **Image** – Downloads an image of the view in .png format
    - **Crosstab** – Opens a dialog window where you can select to download as a .csv or Microsoft Excel .xlsx
    - **PDF** – Opens a dialog window where you can select specific sheets, scaling, paper size, and orientation and then downloads as PDF
    - **PowerPoint** – Downloads selected sheets as images on individual slides in a PowerPoint presentation.

For more details about what you can do with the platform, see below:

What is a Tableau Site

Navigating Tableau Site

What you can do with a Tableau Web View

Downloading Views and Workbooks