

Tableau Server 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** (when applicable).
- 🕒 Print Views and images as **PDFs**.



Access visual data resources on behalf of The Ohio State University.

 **Public Data - Coming soon!**
(No Login Required)

Public Data provides access to widely available Ohio State institutional data.

 **Secure Data**
(Login Required)

Secure Data provides access to secure institutional data with specific access restrictions.

Logging on to Tableau Server

Only authorized users are able to access Tableau Server. If you wish to view a report and do not have an account, please contact the [BAR Team](mailto:BAR_Team@osu.edu) {CIO-BAR_Reporting@osu.edu} to request access. We will identify the Data Steward for your area. You will need to include your name.#, the Project name and the name of the report you wish to access in your request. You will be contacted by your data steward confirming your access once the authorization process is complete. Tableau Server is integrated with the University's single sign on (SSO) authentication and requires a DUOverification.



Terms of Service

Please read carefully these terms of service ("Terms") before using the site. These Terms also apply to interactive features, reports and downloads that are owned or controlled by Ohio state, and are available through the site or that interact with the site. You agree to these Terms by accessing or using the site. If you do not agree to be bound by all of these Terms, do not use the site.

- I understand that Institutional Data can include specific, granular data that can be used to identify individuals and information about them, among other things. This information is clearly sensitive, often confidential and is protected by federal, state and local laws, including FERPA. It is only provided to employees when needed for completing legitimate job-related responsibilities.
- I will participate in training and re-training related to Institutional Data as needed.
- I will use Institutional Data for the sole purpose of fulfilling legitimate job-related responsibilities, and not for academic research, scholarly publications or other uses.
- I will protect Institutional Data as specified in Ohio State's [Institutional Data Policy](#).
- I will not share any findings outside The Ohio State University without prior approval of the President, Provost or designee.
- I understand that, as a result of unauthorized access or use of Institutional Data that I am responsible for, I may be subject to access restrictions and/or disciplinary procedures in accordance with University procedure.
- I also affirm that I have read and understand the following policies and provisions:
 - [Institutional Data Policy \(IDP\)](#)
 - [Family Education Rights and Privacy Act \(FERPA\)](#)

Disclaimer: By clicking *Proceed to Reports* you agree to the Terms of Service listed above.

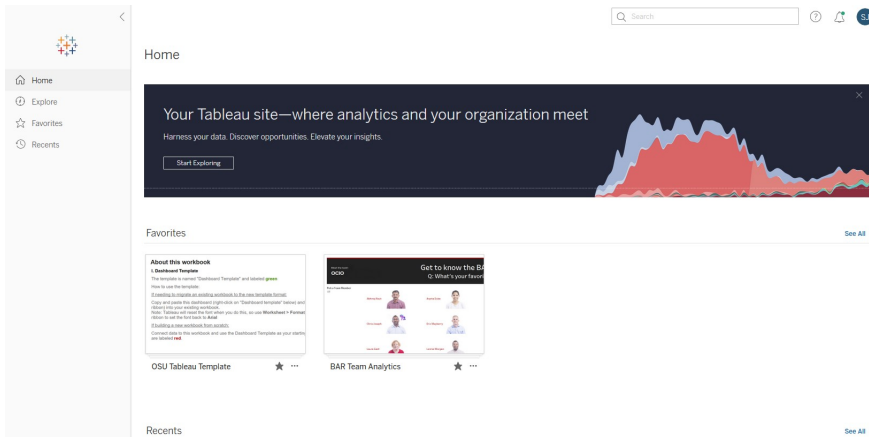
PROCEED TO REPORTS

Resources:

- [Need Help?](#) - Find FAQs, training and contact information

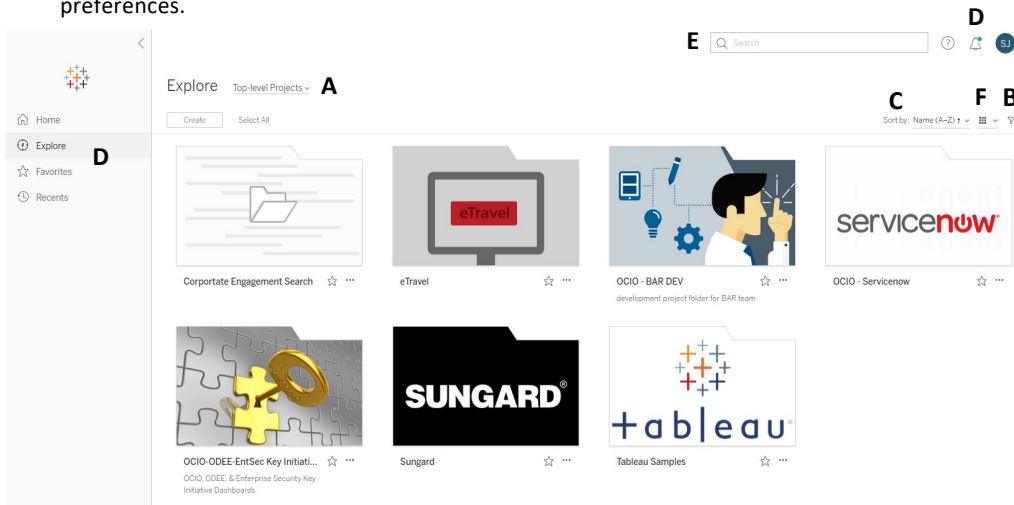
Tableau Server Home Page

This is your home page, click **Explore** or **Start Exploring** to view the server by Projects, Workbooks, etc.



Exploring the Tableau Server Layout

- A:** giving access to Projects, Workbooks and Views.
- B:** Filters to assist in finding content on the server.
- C:** Actions and sort options.
- D:** Menus giving access to help, favorites and user preferences.
- E:** Search box to assist in finding content on the server.
- F:** Thumbnail or List view of content.



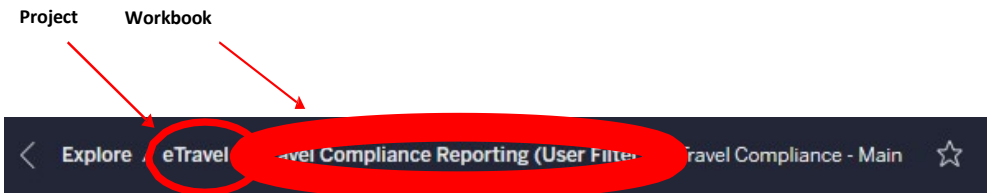
How to use Tableau Server

Understanding the Structure on the Server

Projects > Sub Projects Workbooks > Views

The server is divided into several main **Projects**, which are linked to different areas of the university {College of Engineering, College of Arts & Sciences, etc.}.

Projects contain **Workbooks**, which themselves contain individual **Views** the interactive tables/charts/dashboards that show the information. This structure is visible in the breadcrumb trail that shows your location in the server.



Viewing Workbooks on Tableau Server

It is possible to view the workbooks on Tableau Server in more than one way.

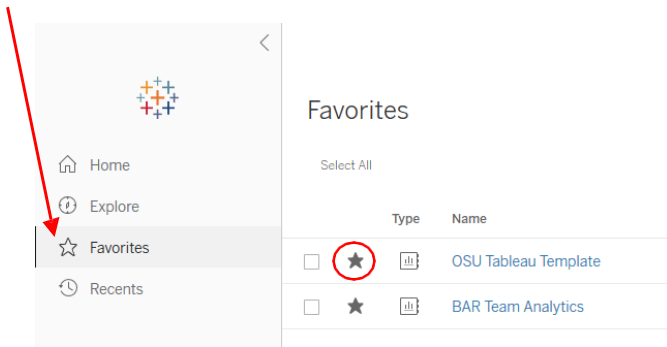
- When a workbook is published, you may be sent a link which will take you to that workbook directly. You will still be required to log in, but the workbook with all its views will then immediately open. This is the most straightforward way of accessing workbooks on Tableau Server, but you may not be able to navigate to different workbooks. Closing the browser completely will log you out from Tableau Server. From time to time, you may receive a login error when trying to login. Try clearing your browsers' cache and restart your browser.

- If you are interested in a suite of reports, you may be sent a link which will take you to a Project or Sub Project containing the relevant reports. Once you have logged in you can then select the workbook in which you are interested by clicking on the name.

Type	Name	Owner	Modified
Archive	Archive	Springer, Jordan A.	Feb 27, 2019, 3:03 PM
Travel Compliance Reporting	Travel Compliance Reporting	Springer, Jordan A.	Jun 13, 2019, 9:37 AM
Travel Compliance Reporting (User Filter)	Travel Compliance Reporting (User Filter)	Springer, Jordan A.	Jun 13, 2019, 3:21 PM
Legacy Travel Payments	Legacy Travel Payments	Springer, Jordan A.	May 22, 2019, 12:03 PM

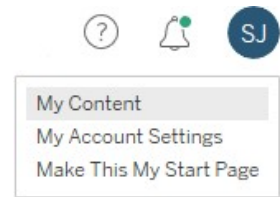
Finding the Relevant Workbook or View

If you do not have a link for the workbook that you wish to view, it is possible to search Tableau Server for specific workbooks. When you have logged on, the menus to the left and at the top help you navigate. Projects: these are collections of workbooks belonging within a specific area. Workbooks: these are a collection of views. Click on a workbook name to see the views available. Views: individual dashboards (tabs), which contain tables, graphs and so forth. Filters and Searching: you can use the search box at the top of the screen to type in the information you are looking for. You do not need to know the actual name of the workbook. You can also filter by specific Projects. Favorites: if there are some views or workbooks that you use regularly, you can add these to your favorites by clicking on the star next to the name of the view or workbook. These can then be accessed from the menu at the left of the screen.



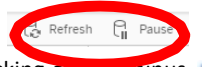
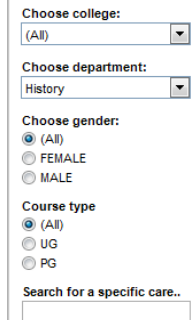
Personalizing your Tableau

You can personalize the way Tableau Server looks to you. If you are only interested in a particular group of example Undergraduate Admissions or Annual reports, you can navigate to these reports using the filter criteria. Click on your name at the top of the screen to 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.



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. If the display is empty, it is likely that your filter choices return no information.
- Pause Automatic Updates:** Every time you update a filter the data in the view refreshes. This can be time consuming if you are making lots of changes. By clicking the 'Pause' button located on the tool bar you can make all your filter choices then click on the 'Refresh' button. The data in the view will refresh with all the new filters.
- Hierarchies:** Some columns or rows are hierarchical. By clicking on the minus or plus buttons you are able to drill in or out to see more or less data.



The image shows two side-by-side Tableau views. The left view is titled 'Hours by Course Name' and shows a table with columns for Department, FY13, and FY14. The right view is also titled 'Hours by Course Name' and shows a table with columns for Department and Course Description. Both views have filters for Fiscal Term (All, S1-Summer, S2-Autumn, S3-Spring).

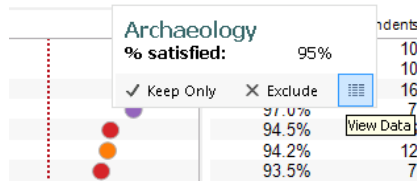
Department	FY13	FY14
ACEL	3,942	4,504
AEDE	9,363	10,422
Animal Science	12,136	12,679
Bus Tech		15

Department	Course Description
ACEL	Research
	Internship
	Data Analysis
	Oral Exp in Agri

How to Use Tableau Server

(<https://tableau.osu.edu>)

- o 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. If you use your mouse and the control key to select several marks you can then choose to **'Keep Only'** those items selected or **'Exclude'** the selected marks to further filter the data that you are viewing. Additionally, by clicking on the **'View Data'** button you can see all the records that are used to build the view; these can then be downloaded into a CSV file. Not all views will have this feature available. If you select an entire column of data, additional icons appear in the tooltip. These enable you to change the sort order of the data, but will react differently depending upon how the initial view was constructed.



Department	FY13	FY14	FY15	FY16	FY17
ACEL	3,942	4,504	4,764	4,952	5,347
AEDE	9,363	10,422	11,664	11,176	11,067
Animal Science	12,136	12,679	12,805	13,738	13,480
Bus Tech					
CT					

Some reports also have hover tooltips where additional, contextual information can be found.

Note on Qualifications Data:

A-levels:
 The information on A-level qualifications used in this report has been transmitted to Oxford by UCAS via ABL (Awarding Body Linkage). The data is verified by the awarding bodies and is the same as used in the confirmation exercise each August. The dataset only includes A-levels taken in the year preceding, or the year of, entry. Therefore, there may be applicants who took A-levels prior to this who will be excluded from this dataset. There may also be applicants who took one or more A-levels early who will not have a complete record in this dataset. For this reason, any students who achieved less than 3 A-levels will be excluded to minimise the inclusion of any applicants where A-levels were

- o One Click Sort:** You can also amend the way in which the data is sorted in the view by hovering over the top of the column or row you wish to sort by and clicking the sort icon. Again, the way in which the view was constructed will determine how this sort function displays.

Department	FY13	FY14	FY15	FY16	FY17
ACEL	3,942	4,504	4,764	4,952	5,347
AEDE	9,363	10,422	11,664	11,176	11,067
Animal Science	12,136	12,679	12,805	13,738	13,480

- o Customizing Your View:** Some views may have a lot of different filter options and you may only ever be interested in data for a particular subset of information. Once you have chosen your filters, it is possible to save this customized version of the view. You can set up multiple customized versions of a view and then share these with other users. Select the relevant filters then click on **'View: Original'** button. Give your view a name and click the **'Save'** button. This view will always be available to you when you log into Tableau Server. If you wish to share this customized view, click on the **'Make it Public'** box.

Hours by Course

Summer Term Only

Make it my default

Make it public

My Views

Nothing saved yet

Other Views

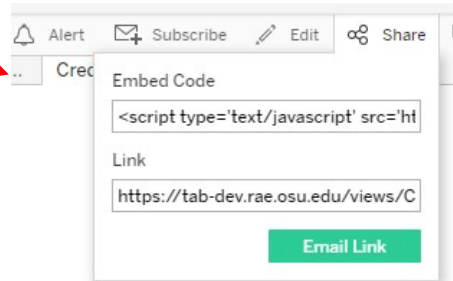
Original (default) Mayberry, Eric

Manage

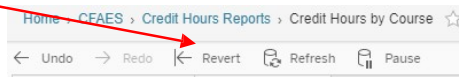
How to Use Tableau Server

(<https://tableau.osu.edu>)

To share this customized view with colleagues, click on the 'Share' button and copy and paste the link into an email or other document.

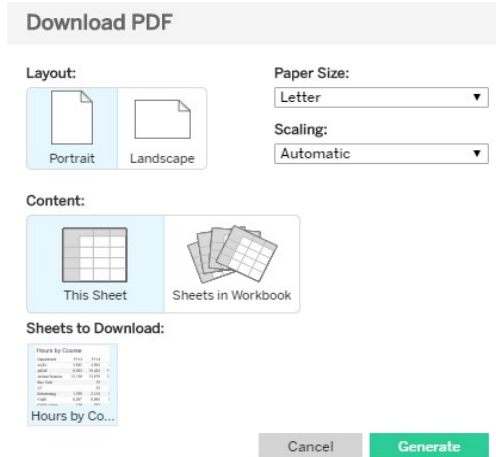
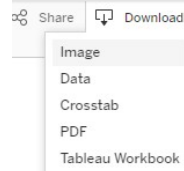


- **Resetting Filters:** If your filter choices have become confusing, or you wish to return to the original view of the data, you can use the 'Revert' button located on the tool bar. The tool bar is located at the top of the view, under the breadcrumb trail.



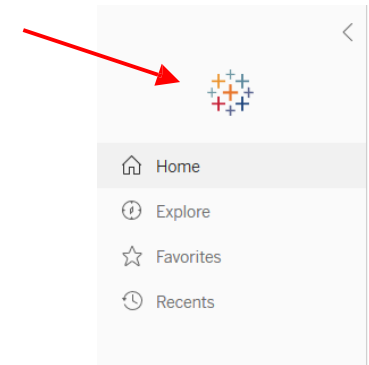
Going Further with your Data

- **Export Data:** As well as viewing the data (described above under tooltips) 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.
- **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.
- **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. Clicking the highlighted thumbnail for a sheet excludes it from the export.



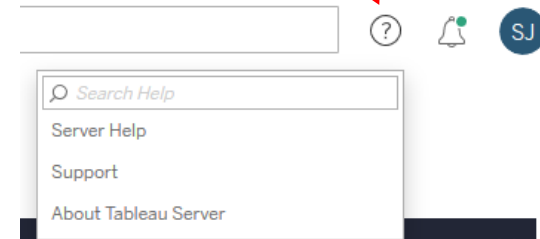
Return to Home Page

- After you have finished exploring a workbook, you may wish to return to the Tableau Server home page to open a new report; this can be done by clicking on the Tableau icon in the top left of the screen.



Need More Help?

When you are logged in to Tableau Server, there is an information icon link towards 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 visit the



[BAR Team site](#) where you can find more tips and our contact information.

We welcome your feedback. For any questions, comments or requests for changes and enhancements, please contact the [BAR Team](#).