# IRDS Tableau User Guide

The office of Institutional Research and Decision Support (IRDS) offers a number of interactive reports, which allow the user to sort, drill down, and display the data to best fit their needs. These reports are published using Tableau software. This user guide will cover the basics of Tableau use, and help you start interacting.

General Information about a Specific Report

Read Me – Many of the Tableau reports include a **Read Me** page that provides an overview of the purpose of the various reports that are included in the various tabs within the report. It may also provide information on where the data is from and when you can expect the reports to be updated.

Hover For Help - This icon is usually located in the upper left corner of a Tableau report. When you hover over the Question mark information (definitions, explanations, notations) specific to the given report will be displayed. It will also include the name of the individual to contact for additional help with a specific report.

Using an Interactive Report: Filters and Functions of a Dashboard

Tabs: Some reports have different tabs across the top of the screen (above the IRDS Icon), which contain different views. Be sure to select the tab that best reflects your question. To move to a different sheet, just click on the tab. Here's an example:
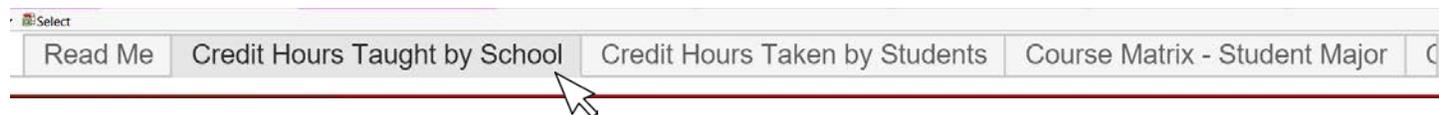
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How to Work with Filters: Interactive reports contain filters, which allow a user to customize the report to fil their specific needs. These filters are located on the left hand side of the report and allow a user to drill down into specific data. Once a filter is selected, the graph/or chart will update to reflect a user's specifications. Filters will not affect the original report and are created for the user's benefit.
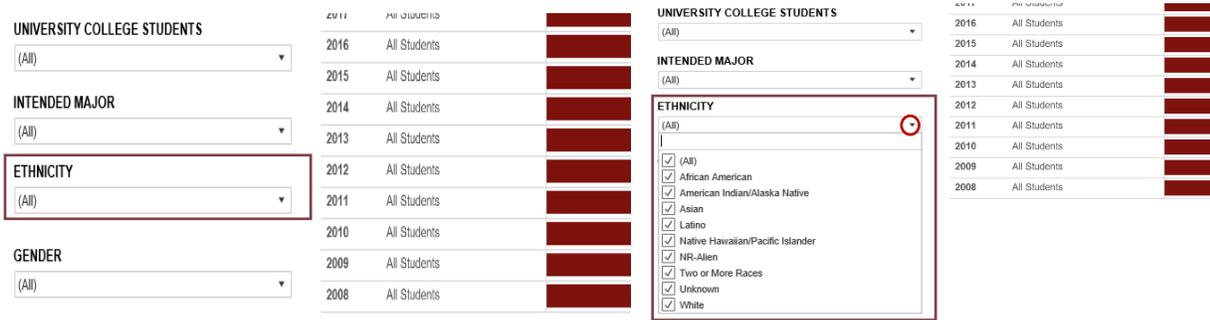
Step 1: *Filters are located on the left margin*

Step 2: *Click on filter triangle to see available options*
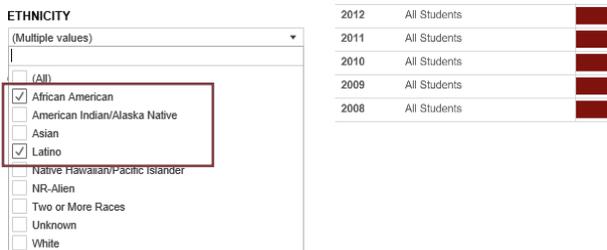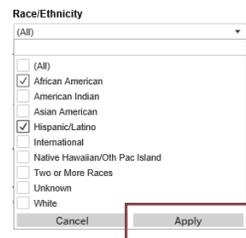
Step 3: *Change the filter to drill down further in the data. Filters also have cream search boxes at the top of bottom of the list of options. Deselect the (All) and then begin typing what you are looking for in the box and then press Enter on your keyboard.*

Step 4: *If an Apply button appears at the bottom of the filter options, select your filters, then click Apply.*

Parameters functions the same as filters but instead of drilling down into the data they will provide a distinctly different view of the data.
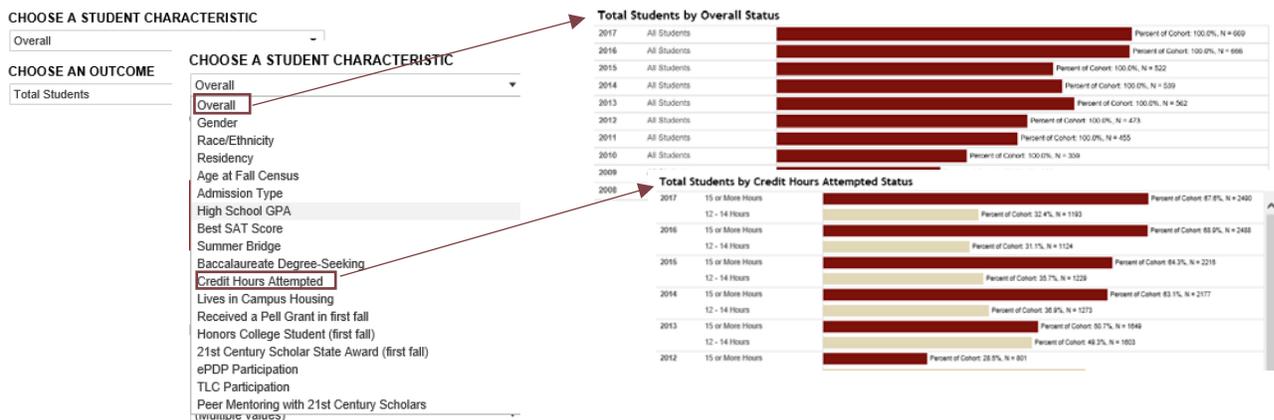
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Tool Tips: Hover over **graphs, reference lines**, and **numerical values** to see more details.
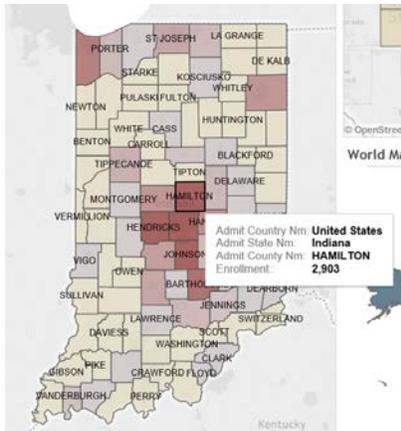
Unduplicated Headcount by Career

|	FALL 2008	FALL 2009	FALL 2010	FALL 2011	FALL 2012	FALL 2013	FALL 2014	FALL 2015	FALL 2016	FALL 2017
Undergraduate	20,390	20,926	21,202	21,235	21,379	21,569	21,777	21,217	21,001	20,870
Graduate	5,035	4,315	4,346	4,377	4,250	4,186	4,207	4,168	4,149	4,318
Doctoral-Practice	2,637	2,718	2,738	2,790	2,792	2,789	2,839			
Doctoral-Research	502	564	606	643	697	766	793			
Graduate Special	703	667	631	484	441	338	326			
Undergrad Special	1,033	1,193	1,043	1,001	892	840	748	768	747	740
Grand Total	30,300	30,383	30,566	30,530	30,451	30,488	30,690	30,105	29,804	29,790

Acad Term: **FALL 2014**
Career: **Graduate**
Undup Headcount: **4,207**
% of Total Enrollment: 13.71%

Highlighting: When you click on a graph or a legend for a graph, all of the graphical elements that are associated with that data point will be highlighted. To remove the highlighting, click again (sometimes twice) on the same graphical element. In other instances, clicking on an element may act as a filter on an adjacent table or may cause an additional, more detailed report to become visible.

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Hierarchical or Nested Data Views – Hierarchical views allow you to drill down to additional data within a larger category, i.e. School – Program—Plan. This can be done by hovering over a column title until you see a (+) and then clicking on it to expand the data. The reverse is accomplished by clicking on the (-).

Hover over the title and click the (+) to Expand

School...	Fall 2008	Fall 2009	Fall 2010
Fairbanks Sch of Public Health			
Herron School of Art and Design	909	945	908
Kelly School of Business	2,513	1,645	1,672
Lilly Fam Sch of Philanthropy			
R.H. McKinney School of Law	994	991	
Sch of Health of Rehab Schiences	211	217	
Sch of Informatics & Computing	660	696	
School of Continuing Studies	1,033	1,047	
School of Dentistry	672	706	
School of Education	1,648	1,717	
School of Engr & Tech-Purdue	2,523	2,657	
School of Journalism	182	210	
School of Liberal Arts	1,926	1,976	
School of Library and Information Sci	326	329	

Hover over the title and click the (+) to Expand

School...	Academic Program...	Fall 2008	Fall 2009	Fall 2010
Fairbanks Sch of Public Health	Grad Sch - Public Health			
	Public Health Graduate			
	Public Health Professional			
	Public Health Undergraduate			
Herron School of Art and Design	Herron Art Grad Nondeg			
	Herron Art Graduate	37	49	46
	Herron Art Undergraduate	872	896	862
Kelly School of Business	BL/IN Kelley Direct Bus Grad	916		
	BL/IN Kelley Direct Bus Grad..	37		
	Bus Grad Accountancy Nondeg	1	1	1
	Business Grad Accountancy	159	181	189
	Business Grad Nondeg	25	17	33
	Business Graduate	334	378	317

Other Functions: Tips & Tricks

BUTTONS: These are located above or below an interactive report. See below for what they do, and how you can use them:

For reports that require CAS authentication to access, you will find some additional functionality available.

Download: This button allows the user to export the report and its data.

- PDF: A user can download the current dashboard or the entire report as a PDF, allowing you to print what you see.
- Image: This allows a user to save an image of the current graph with the selected filters applied. (You made need to click the report a 2nd time.)
- Data (restricted): The data feeding the report will open in a new window. This data can then be downloaded as a text file.
- Crosstab (restricted): Transfer data from the dashboard into Excel by selecting any of the data from the report.

Revert: This button allows the user to clear all filters and view the original report.

Pause/Resume: As you interact with a report, you may find the report takes some time to update any changes made with a filter. Use the "Pause" button to pause those changes from occurring as you update the filters. Once you have selected all filters you want, click the "Resume" button to have the report update.

View: Once you have applied all the filters you need to see the specific data selection click View and provide it with a name i.e. "Biology". You will then be provided an opportunity to set this view as you default view.

How to Print

This will allow the report to open to these specific settings each time you login to the report.

You can quickly print all or part of a workbook using the PDF command on the Download toolbar button. You can select your PDF orientation, paper size, and choose whether to print the entire workbook or selected sheets.

1 **Select the PDF Option**
from the Download toolbar button, select **PDF**.
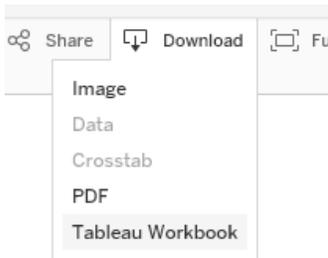
2 **Select Sheets**
Choose whether to print the entire workbook, dashboard, or only certain sheets. Clicking the highlighted thumbnail for a sheet excludes it from the report.
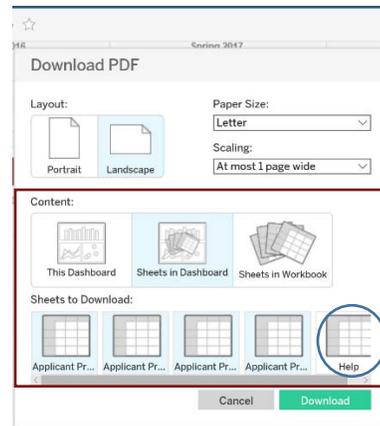
3 **Choose a Layout and Paper Size**
Select either a Portrait or Landscape orientation and a Paper Size.
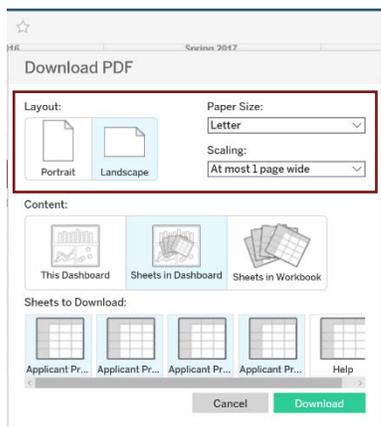
4 **Print the PDF**
In the Download PDF dialog box, click download. After a few seconds, another Download PDF dialog box will appear. Click download again to download and print your PDF

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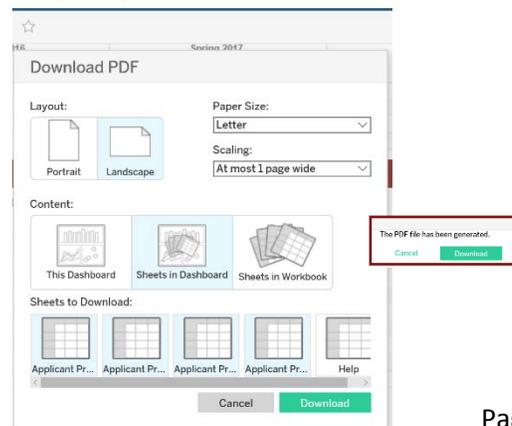
FAQs: Frequently Asked Questions

- **Can I "break" a dashboard/alter the data permanently?**

  No. The interactive report that is published online is intended for community use. No matter how many filters or changes you make, the original report and data will not be affected.

- **Can I access the data behind the interactive report?**
  This depends on the report. If the report is public then the data is not available. For reports requiring CAS authentication the answer is "possibly". If available, you will use the "Download" button and select "data," the data will then download into Excel. If you do not see "data" as an option, try selecting data elements within the report first, then click the "Download" button. Many reports will not grant access to data for security purposes, unless you work in a specific IU office.

- **Are there any other Tableau-related resources available?**
  Yes. UITS and Tableau (requires registering) have websites with training video links and tutorials.

For additional questions, please contact IRDS by email: IRDS@IUPUI.edu