## **TABLEAU USER GROUP** June 11, 2019

### Agenda

#### Welcome

- Contract Changes for Prep Katie
- Tableau training videos link Katie
- New user "How To" documents Kendal
- Every 100 Students dashboard Kendal
- Demo example of pyramid dashboard Jeremy
- Demo of setting permission (SharePoint embedding issues if set permissions to all users) Jeremy
- Set Actions New features with upgrade Sushanth
- Market Basket Analysis Sushanth
- Data Digest Project Nichole
- Tableau Conference Details Taylor

#### **Questions and Closings**

# Contract Changes -Prep

Katie Hendryx

### **Contract Changes - Prep**

#### Now

- Prep License
  - FREE to the University

#### Desktop Licenses

Centrally funded - maintenance fee

#### **July 2020**

- Prep transitions into a Creator License
  - <u>NOT</u> centrally funded
  - \$300 per year per license for 3 years
  - \$630 per year per license in year 4

#### Creator License

- <u>Users</u> will need to budget for the license
- No Prep Keep Desktop Licenses
  - Continued central funding

Salesforce acquired Tableau yesterday and as we know more we will keep you informed.

## Tableau Training Video Links Katie Hendryx

### **FREE Tableau Training Videos**

#### **Free Tableau Videos**

Connecting to D	Data	6	52 MIN
Visual Analytics		13	36 MIN
Dashboards and	d Stories		to MIN
() Getting Started v	with Dashboards and Stories	•	4 MIN
🕑 Building a Dashb	board	•	5 MIN
Dashboard Object	rts	•	4 MIN
Dashboard Form	atting	•	4 MIN
🕑 Dashboard Inter	activity Using Actions	•	5 MIN
🕑 Dashboard Exter	nsions		4 MIN
🕑 Device Designer			5 MIN
Story Points		•	5 MIN

## New User "How To" Documents Kendal Kosta-Mikel

### **How To Documents**

- Started by CoS student employees to document common Tableau practices for new hires
- Variety of topics
  - Conjoin Filters
  - o Hex Map
  - o Sankey
  - Viz in Tooltip
  - Ranked Line Graph
  - Color By filter
  - Sheet Selector Parameter
  - O Format Totals on Stacked Columns
  - Replace Current Data Source with Updated Version

# **Every 100 Students**

### Kendal Kosta-Mikel

# Pyramid Dashboard

### **Jeremy Sheiko**

## Setting Permissions (SharePoint) Jeremy Sheiko

# Market Basket Analysis

#### **Sushanth Janagam**

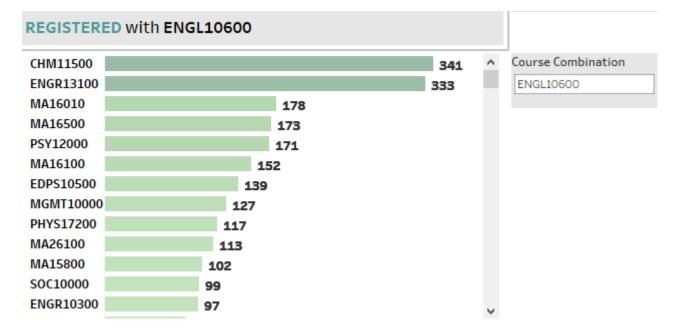
This is not the typical analysis used by supermarket giants as our data doesn't involve customer transactions.

#### The compromise:

We can dynamically answer combination questions. This is the Market basket Analysis we can do in tableau.

Ex: How many students got/didn't get both X and Y. X and Y can be types of Scholarship, Grades, Course Enrollment etc.

### Example



## **341 students Registered for <u>both</u> ENGL10600 and CHM11500**

### Steps:

## Since most of our analysis is around student data, we assume the group is students.

Туре	
Athletic Aid	Abc
Employment & Employme	Abc
Federal Grants	Abc
Federal Loans	Abc
Federal Work Study	Abc
Fee Remissions	Abc
Forgivable Loans	Abc
General University Grants	Abc
Graduate Fellowships & T	Abc
Non-Indiana State Awards	Abc
Private Awards	Abc
Private Loans	Abc
Purdue Loans	Abc
State Awards	Abc
University Incentive Gran	Abc
University Scholarships	Abc

## How many students got a combination of X and Y.

#### X and Y are dynamic and in this case let's assume they are AID related.

### Create a parameter, two fields and a Set

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Comment >>

#### **Parameter :** Add from field , select the same **Dimension : TYPE**

Create Parameter

Properties

Name: Type combination

#### **Calculated Field:**

ID MATCH

if [Type]=[Type combination ] then 1 end

#### Set Right Click on ID-> Create Set

Data type:	String	•					
Current value:	Athletic Aid	•			Edit S	et [Als	o contains]
Display format:		~			Name	: Also	contains
Allowable values:	🔿 All 💿 List	O Range			Ge	neral	Condition
List of values					0	None	
Value		Display As	^	Add from Parameter 🔺	0	By field	d:
Athletic Aid		Athletic Aid		Add from Field			
Employment & En	nployment Relat	Employment & Employment		Add from Field		Acad	lemic Period
Federal Grants		Federal Grants		Paste from Clipboard		=	7 0
Federal Loans		Federal Loans				-	U
Federal Work Stu	Jdy	Federal Work Study				Ran	ge of Value
Fee Remissions		Fee Remissions		Clear All			
Forgivable Loans		Forgivable Loans				Min	:
General Universit	ty Grants	General University Grants				Mar	
	Line o Training	Conducto Followships 0 Tesi	× .			Mat	G

ains ondition Top Period Count 0 f Values Load SUM([ID MATCH ])>=1

×

### Create a parameter, two fields and a Set

#### **Calculated Field 2 :**

Type also co	ontains				
IF [Type]	<> [Type	combination ]	] then	[Type]	END

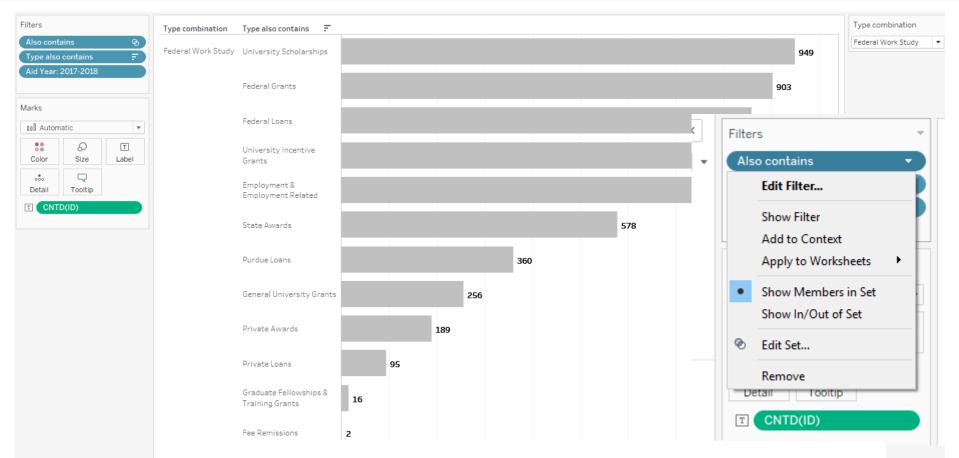
#### We create a parameter so we can have two axis with same fields.

### The calculated field 1 ( ID Match ) is used to flag Id's that have the desired combinations.

Set is created to dynamically filter out the above flagged ID's.

Calculated field 2 ( type also contains ) is used to filter out X-X and Y-Y combinations which are obvious.

### Implementation

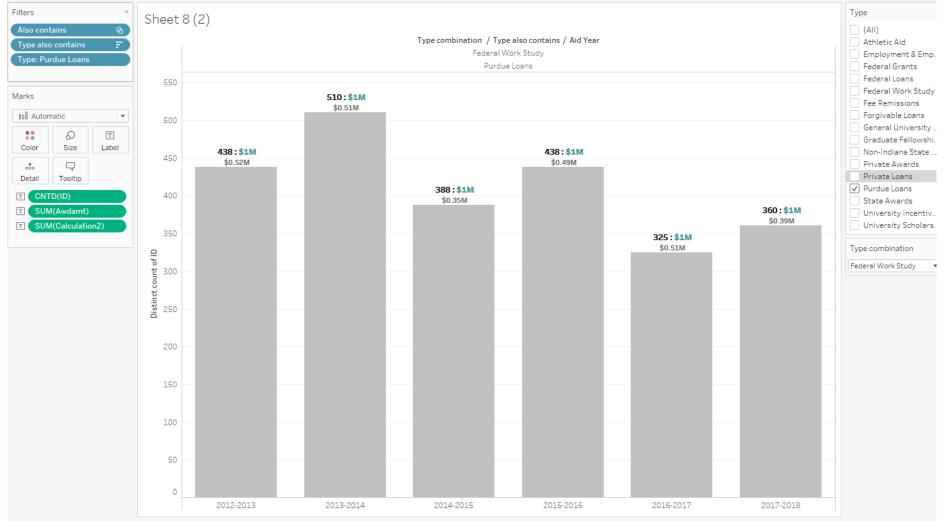


#### **360 Students received both Federal Work Study and Purdue Loans**

### **Further implementation 1:**

Pages	iii Columns CNTD(ID)							
	E Rows	n Type also contains	s 🖅					
Filters	Type combi Type also contains							Type combination
Also contains 📀	Federal University Scholarships Work Study						<b>949 : \$5M</b> \$0.91M	Federal Work Study 🔻
Aid Year: 2017-2018	Federal Grants						03 <b>: \$5M</b> \$0.94M	
Marks	Federal Loans					858 : \$ \$0.81		
Color Size Label	University Incentive Grants					<b>806 : \$2M</b> \$0.93M		
Detail Tooltip	Employment & Employment Related					<b>799 : \$3M</b> \$0.71M		
T       CNTD(ID)         T       SUM(Awdamt)         T       SUM(Calculation2)	State Awards				578:\$4M \$0.58M			
	Purdue Loans			<b>360:\$1M</b> \$0.39M				
	General University Gran	5	<b>256 : \$1M</b> \$0.26M	Calculation2				×
	Private Awards		189: <b>\$1M</b> \$0.20M	{ FIXED [ID] ,[A:	id Year]: sum (if [Type]	=[Type combination ]	then ([Awdamt]) en	a) }
	Private Loans	<b>95 : \$1M</b> \$0.09M						
	Graduate Fellowships & Training Grants	16:\$0M \$0.0 <b>360</b>		nts rec	eived b	nth		
	Fee Remissions	2: <b>\$0</b> M						
		reae	rai W0	ILK ZIN	dy ( \$0.3	SAW1 9		
		Dure		no (¢4				
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				ΙΙΟ ΙΨΙ				

### **Further Implementation 2**



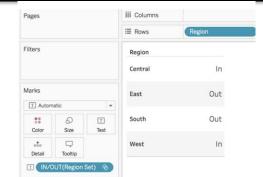
**Trends of Custom User combinations** 

# Set Actions - New Features With Upgrade

Susanth Janagam

### **SETS**

SETS are a way to custom group things in an Organization.



They are categorized into two: IN SET , OUT of SET

We had an option of custom defining the set by conditions. Ex: IF Profit > \$10,0000 then IN SET.

What if USER is given the power to custom group?

Tableau has recently released **SET ACTIONS**, this is deemed to be the most powerful feature since LOD's.

### **How to create SET ACTIONS?**

For this example, we are using one sheet to group other sheets. There are ways to group and use actions with in each sheet.

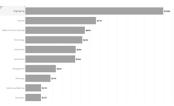


#### We need a dimension based on which we want to group the TARGET. Example : Merit based Need Vs Non Merit based Need.

**Target Sheet:** 

#### We need a dimension that groups based on SOURCE.

Example : Colleges



### **Creating Set**

Dimensions III P	•	Aid Year: 2017-2	2		Sheer o
Abc Federal Fund Id Abc Fund Abc Fund Detail Code Abc Fund Need Indicator Abc Fund Source		Type Marks Add to Sheet			Engineeri Scier
Abc Fund Source Desc Abc Fund Title Abc Fund Type Abc Fund Type Desc		Show Filter Duplicate Rename Hide			Health & Human Scienc Technolo
		Aliases Create	F		Calculated Field
		Transform Convert to Measure	•	Ø	Group Set
Measures		Change Data Type	×	-	Parameter

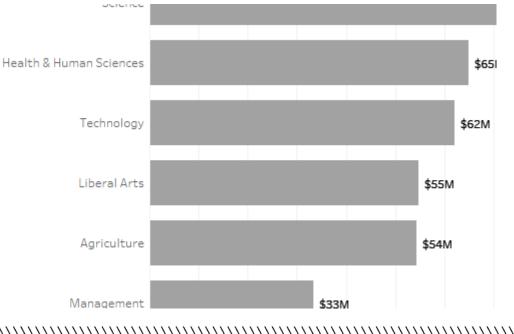
#### Here, Source sheet dimension or Merit/Need indicator should be used to create the set.

Create Set	>
Name: Fund Need Indicator set	
General Condition Top	
Select from list      Custom value list      Use all     Enter search text	
Merit Need	
All None	Exclude
Summary	
Field: [Fund Need Indicator]	
Selection: Selected 0 of 2 values	
Wildcard: All	
Condition: None	
Condition, None	
Limit: None	

### **Using the set**

#### Drag the set on to the TARGET SHEET into Color. IN SET ( Whatever User Clicks ) = **BLUE** OUT SET ( Remaining) = Grey Since we didn't set any actions yet, all the colleges in TARGET are in grey color.

larks		v
00 Automatic		•
	Ð	Т
Color	Size	Label
	$\Box$	
Detail	Tooltip	
	und Need Indiac	ator Set) 🛛 🖉
T SUM(Awd	lamt)	



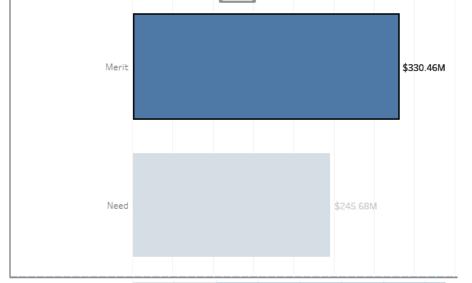
### **Set Actions in Dashboard**

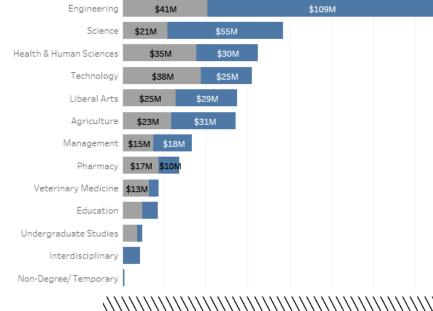
Edit Set Action	×
Name: Set1 Source Sheets	·
<ul> <li></li></ul>	Run action on:
⊘ Fund Need Indiacator Set     ✓	learing the selection will: ) Keep set values ) Add all values to set ) Remove all values from set OK Cancel
	OK Cancel

#### Put both the SOURCE and TARGET sheets on the dashboard.

Steps: Dashboard -Actions-Add Action -Change Set Values.

### Implementation:





The bottom half is split between merit and need based on our selection.

As mentioned before, **BLUE: IN SET** (MERIT based Aid)

https://tableau.itap.purdue.edu/views/SetActionsE xample/Dashboard1?iframeSizedToWindow=true&: embed=y&:showAppBanner=false&:display\_count= no&:showVizHome=no

# Data Digest Project

#### **Nichole Ramirez**

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### Data Digest Improvement Project

What's going to change?

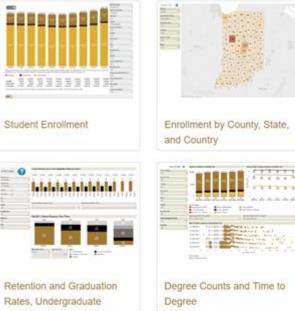
Accessibility Transparency Functionality

**Technical feedback on functionality** 

#### Tableau Users Group: Evaluate current dashboards and new demos

#### Want to provide feedback? Contact:

nramire@purdue.edu -ordatadigest@purdue.edu



Improvement Team: Ottlie Webb Kendal Kosta-Mikel Nichole Ramirez

# 2019 Tableau Conference

### **Taylor Stayback**

### **2019 Tableau Conference**

### \$600 DISCOUNT CODE: VEGASTC19EDU

#### Prices increase August 16



# Community Feedback and Questions

# THANKYOU

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#### WE ARE PURDUE. WHAT WE MAKE MOVES THE WORLD FORWARD.

EA/EOU