



# Tableau Quick User Guide

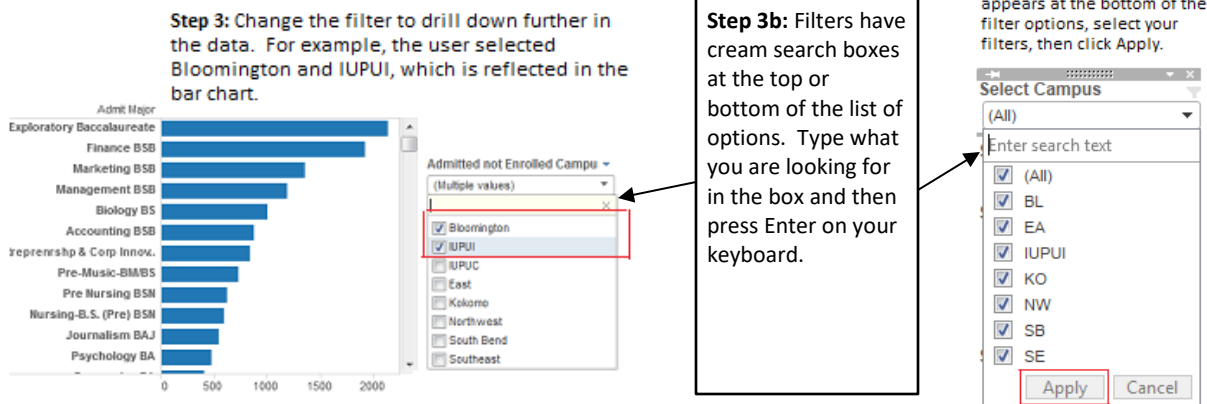
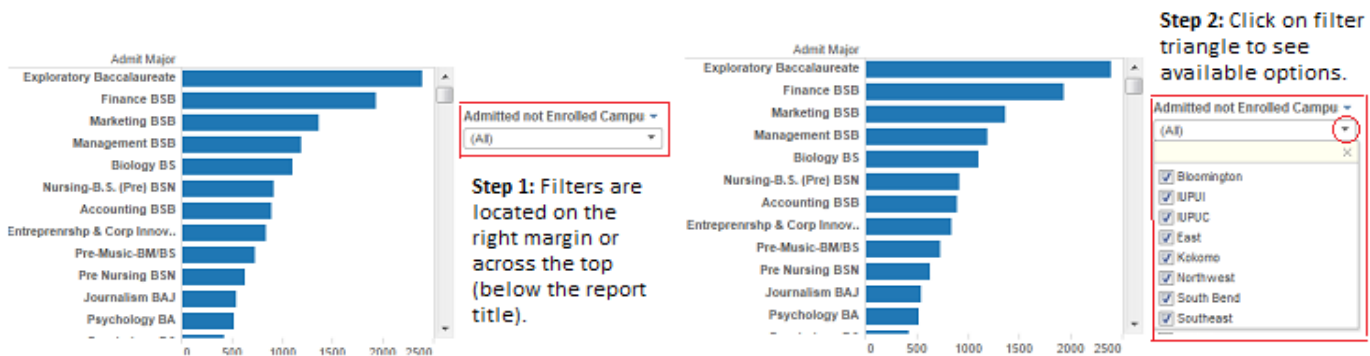
The Institutional Analytics (IA) [Finding Data website](#) offers a number of interactive reports, which allow the user to sort and display the data to best fit their needs. These reports are published using Tableau software. This quick user guide will cover the basics of Tableau use, and help you start interacting!

## USING AN INTERACTIVE REPORT: FILTERS AND FUNCTIONS OF A DASHBOARD

**Tabs:** Some reports have different tabs across the top of the screen (above the IU 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:

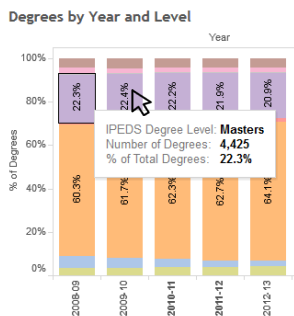


**How to Work with Filters:** Interactive reports contain filters, which allow a user to customize the report to fit their specific needs. These filters allow a user to drill down into specific data. Once a filter is selected, the graph will update to reflect a user's specifications. Filters will not affect the original report and are created for the user's benefit.

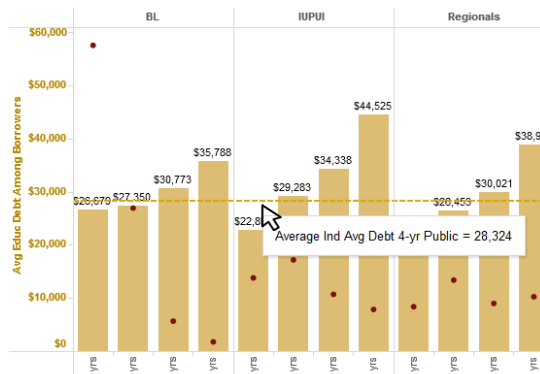


**Tool Tips:** Hover over graphs, reference lines, blue circles next to filters, and red information icons to see more details.

### Graph



### Reference Line

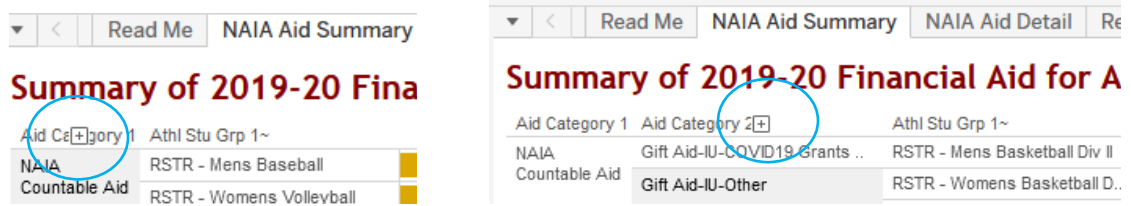


### Blue Circle

**Degree Institution:**  
At IUPUI students can receive degrees from either IU or Purdue University  
IU: Represents the degree was awarded from Indiana University.  
PU: Represents the degree was awarded from Purdue University.

Hovering over a blue circle will display a definition of that option.

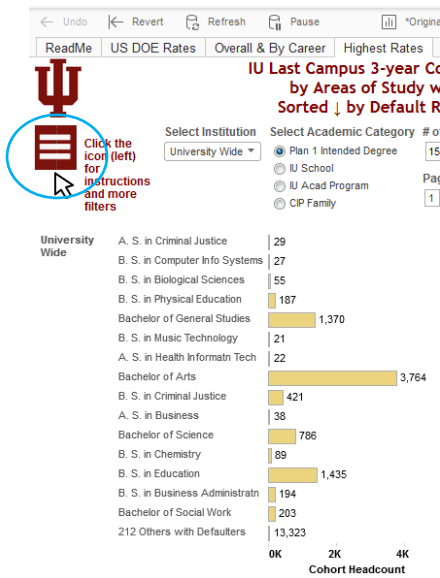
**Show or Hide Sub-Category Columns:** In some dashboards, you can show or hide additional category columns to further break down the data. To show or hide a sub-category column, hover over the column header to see if a plus (+) or minus (-) sign appears in the middle of the column header text. If so, you can click on the plus or minus to show or hide the sub-category column to the right of this column.



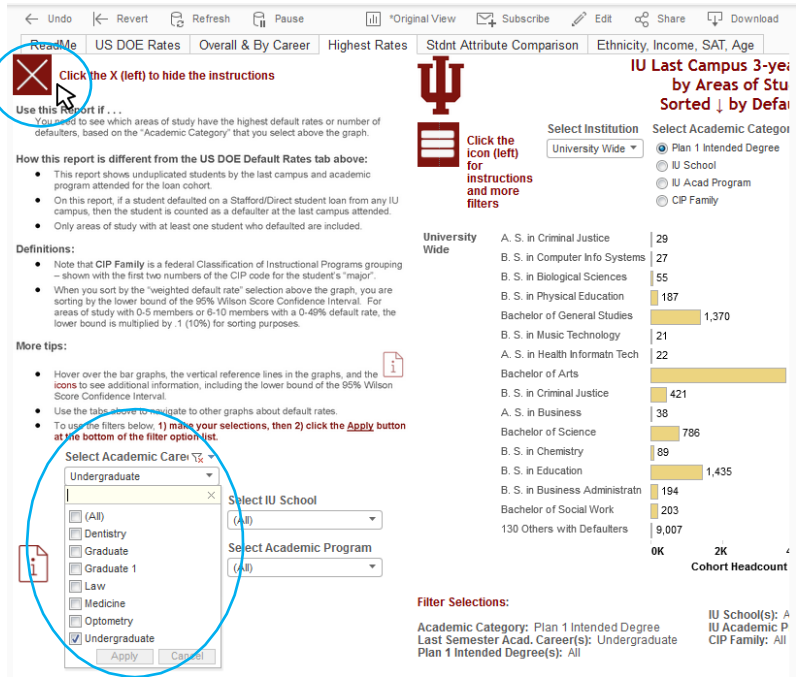
**Highlighting:** When you click on a graph or a legend for a graph, all of the graphical elements that are associated with that data point will be highlighted. To remove the highlighting, click again (sometimes twice) on the same graphical element.

**Menu Icon (Hidden instructions and filters)**

Some reports will have a **menu icon in the upper left**. Clicking on this opens an additional sheet showing instructions and/or additional filters.



After selecting your filters, be sure to click on the **X icon in the upper left** to collapse the additional sheet, so that you can see the entire set of report graphs that reflect your filter selections.



## OTHER FUNCTIONS: TIPS & TRICKS

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



**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 filters). (You may need to click a 2<sup>nd</sup> 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 the 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.



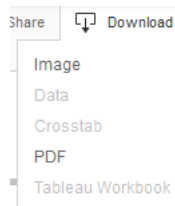
**PAUSE/RESUME:** As you interact with a report, you may find the report takes some time to update any changes made with a filter. Use the “Pause” button to pause those changes from occurring as you update the filters. Once you have selected all filters you desire, click the “Resume” button to have the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

## HOW TO PRINT

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.

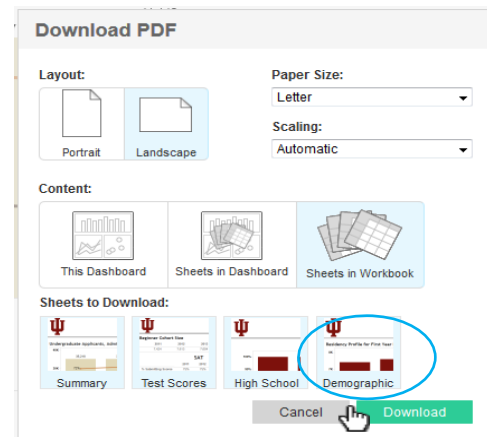
### 1 Select the PDF Option

From the Download toolbar button, select **PDF**.



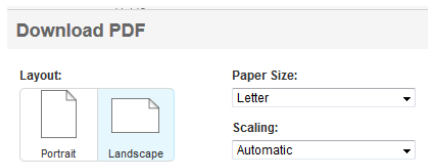
### 3 Select Sheets

Choose whether to print the entire workbook, dashboard or only certain sheets. Clicking the highlighted thumbnail for a sheet excludes it from the report.



### 2 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.

## 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 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 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. [Tableau](#) has a website with training video links and tutorials.

For additional questions, please [contact Institutional Analytics](#).