

University of California Tableau User Group (TUG)

Hosted By:

UC Office of the President

01-20-17

Agenda

- Welcome/introductions
- Best practice of the month
 - Using Tableau for Data Governance – Ola Popoola
- Great dashboard of the month
 - UC Employee FTE – Christopher Brooks
- Tip and trick of the month - Ryan Chan (Next month)
- Tableau Server
 - Connecting Tableau to Service Now – Krishna Malipatel – UCOP Data Services
- Next meeting
- Q & A



BEST

PRACTICE

Data Governance (DG)

- Data governance and confidence
- Discover the right data for the right use
- Store data once; apply multiple times
- Centralized data sources
- Shared calculated fields
- Process to approve all centralized data sources, reports and dashboards

Coming Soon to Tableau Server

- Certified Content – Certified & Vetted!

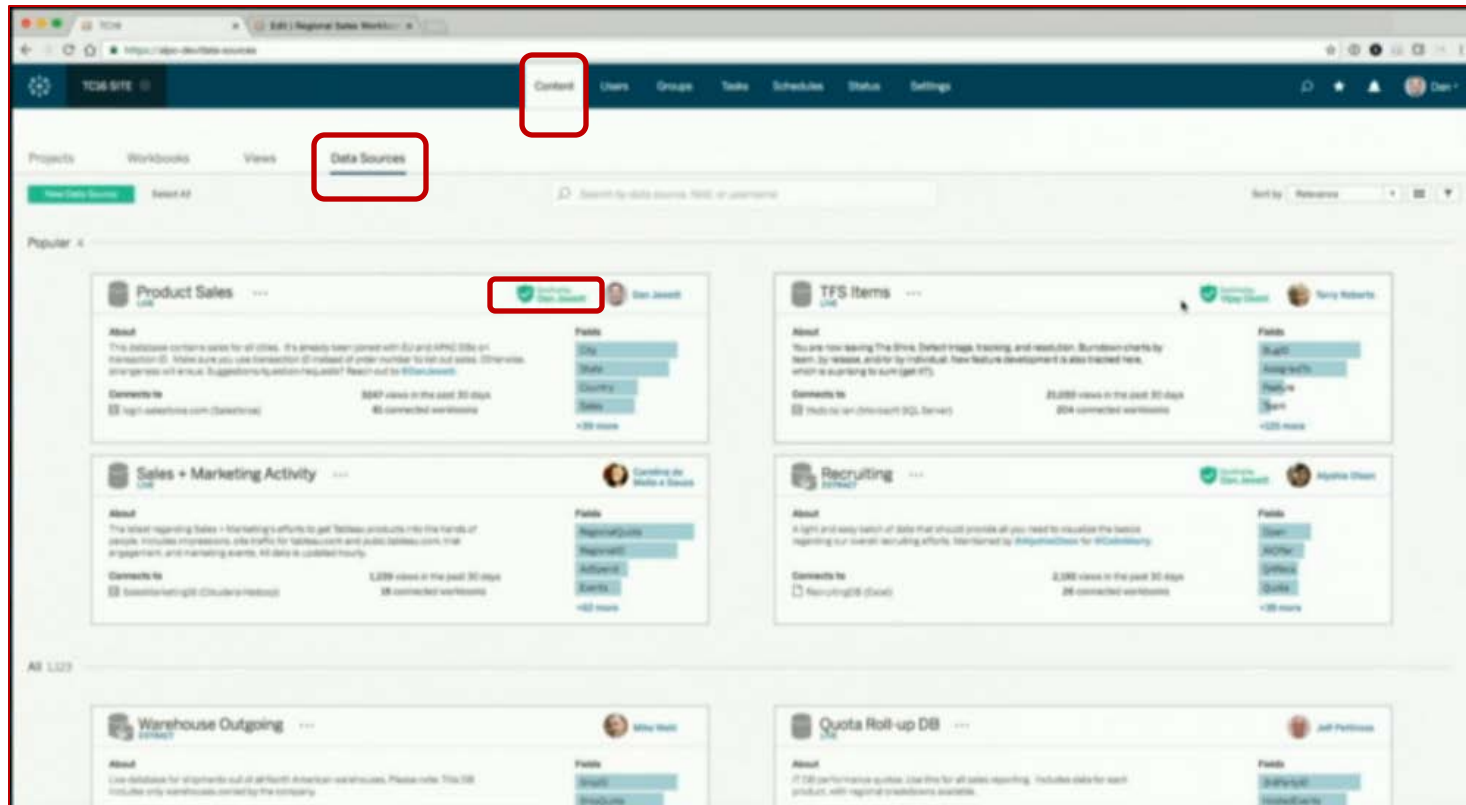



Tableau Server – Data Sources Page

Search by data source, field, or username Sort by Relevant

Data has been certified and vetted by expert in that area!



TFS Items LIVE ...


Certified by Vijay Doosta

About
You are now leaving The Shire. Defect triage, tracking, and resolution. Burndown charts by team, by release, and/or by individual. New feature development is also tracked here, which is suprising to sum (get it?).

Connects to
thfdb.tbl.lan (Microsoft SQL Server)

21,050 views in the past 30 days
204 connected workbooks

Fields
BugID
AssignedTo
Feature
Team
+125 more



Recruiting EXTRACT ...

Certified by Dan Jewett

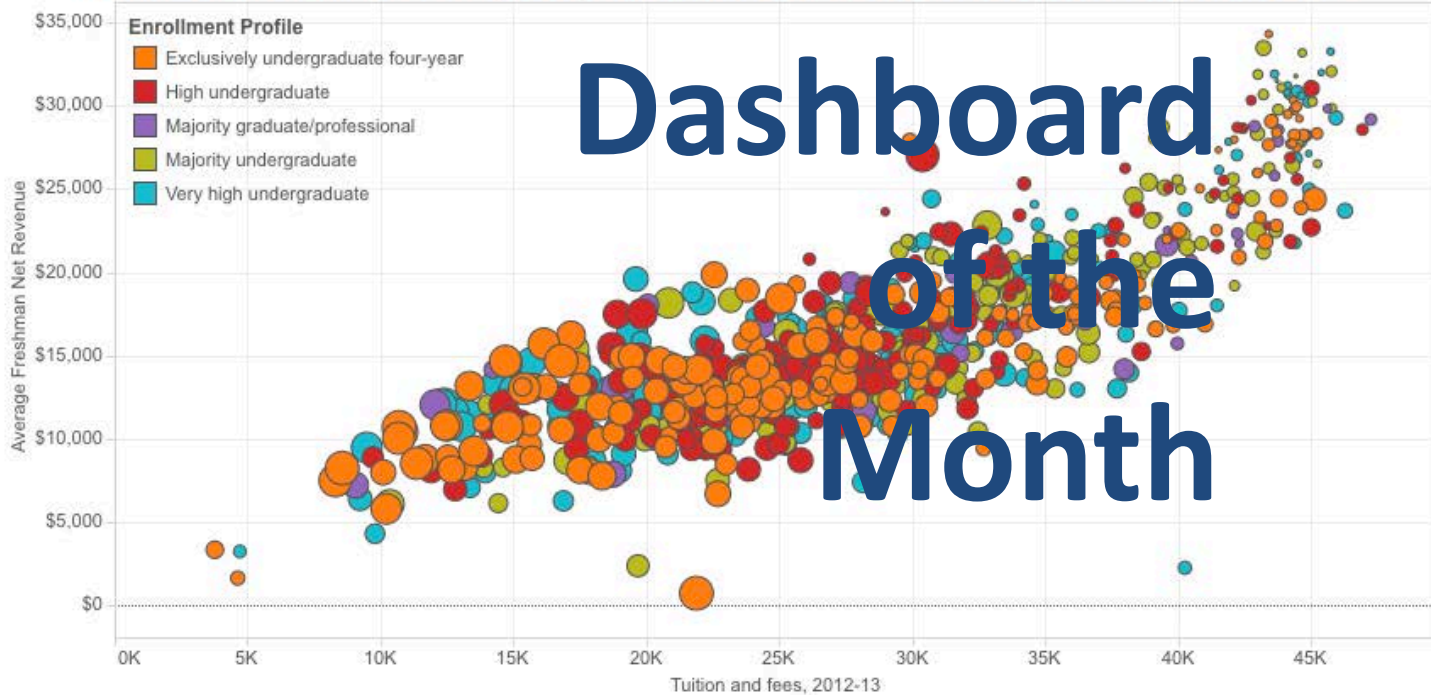
About
A light and easy batch of data that should provide all you need to visualize the basics regarding our overall recruiting efforts. Maintained by @AlyshiaOlsen for @ColinMerry.

Fields
Open
MOffer

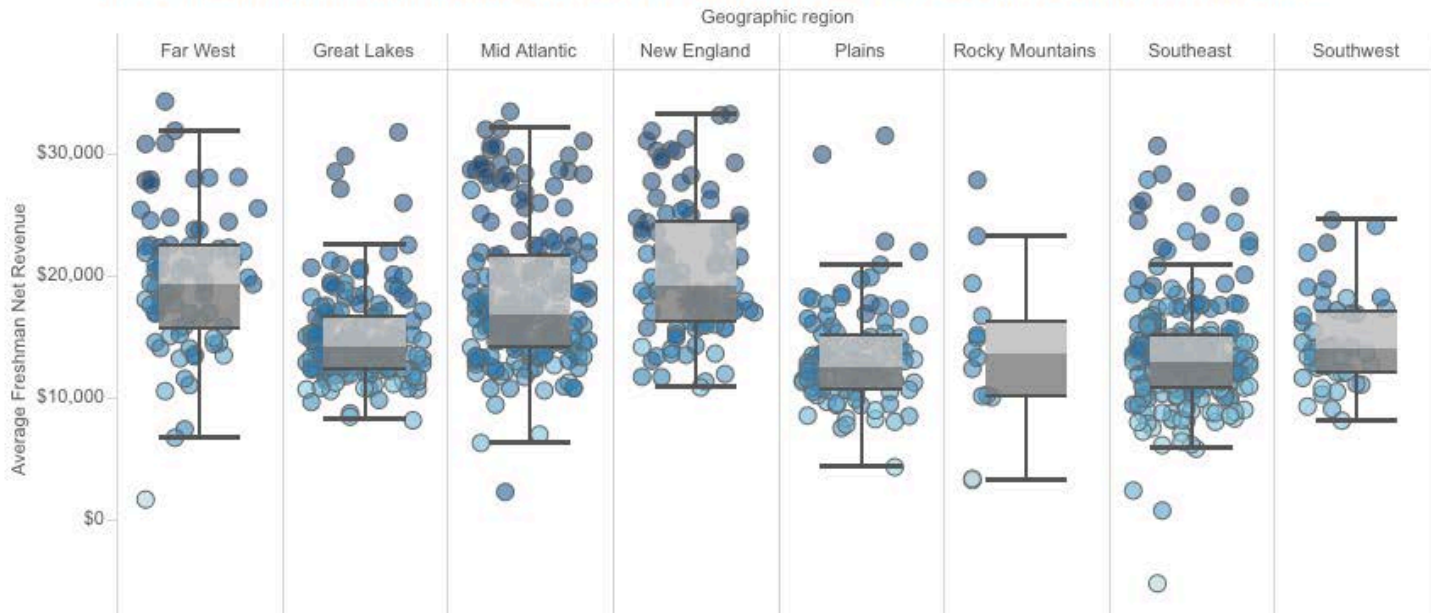
Reasons to Certify

- Benefits of vetting and certifying content
 - IT
 - Proper joins
 - Proper security and access privileges
 - Performance optimization
 - Standard calculations
 - Business
 - Confidence that data is trustworthy
 - Accurate

Tuition and Net Revenue Scatter, 2012; Size shows percent of freshmen with Pell. Hover for details.



Net Revenue Per Freshman, Fall 2012; color shows Tuition with Dark Blue High. Click on Region Name to filter above.



How to Interact



Carnegie Rollups
Make selection(s)
Click Apply

(Multiple values) ▼

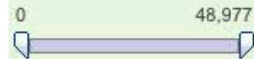
Religious Affiliation
Make selection(s)
Click Apply

(All) ▼

Freshmen with Pell Percent



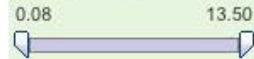
Undergrad Enrollment



Admit Rate



Draw Rate (Market Power)



Source: FY 2012 IPEDS
Provisional Release Data
Downloaded from
<http://nces.ed.gov/ipeds/dat>

August 20, 2014

Responsibility for data accuracy resides with institution

UC Employees FTE

Changes in staffing levels at UC reflect growth in enrollment, research activity and health science services have been accompanied by a long term-trend toward increased professionalization of the workforce. Between 2007-08 and 2015-16, enrollment grew by 15%, research expenditures (through 2014-15) grew by an inflation-adjusted 9% and medical center expenditures (through 2014-15) grew by an inflation-adjusted 46%. Additional information on staffing trends at UC can be found in the Topic Brief "Employee Trends at UC: Focus on Staff" http://www.ucop.edu/institutional-research-academic-planning/files/employee_trends_at_UC.pdf

Service Focus		Funding Source		Career Status			Location			
(All)		(All)		(All)			(All)			
		OCT2007	OCT2008	OCT2009	OCT2010	OCT2011	OCT2012	OCT2013	OCT2014	OCT2015
Academic Personnel	Academics	39,219.9	40,094.5	40,620.3	41,726.1	41,669.9	41,986.2	42,425.4	43,177.5	44,489.1
	Total	39,219.9	40,094.5	40,620.3	41,726.1	41,669.9	41,986.2	42,425.4	43,177.5	44,489.1
Non-Academic Personnel	Senior Management Group (SMG)	284.1	292.8	290.1	196.2	192.6	183.7	173.7	171.8	170.2
	Managers (M)	4,260.9	4,427.7	4,451.4	4,573.5	4,755.6	5,033.3	4,956.3	5,441.7	5,679.2
	Senior Professionals (SP)	3,290.0	3,519.7	3,735.5	3,832.5	4,018.0	4,251.3	4,734.9	4,728.8	5,103.0
	Professional & Support Staff (PSS) - Non Students	77,914.4	79,721.3	78,817.3	78,669.5	79,606.6	81,168.4	81,887.3	84,007.3	86,589.6
	Student Staff	6,654.0	6,911.4	6,788.6	7,172.4	7,429.0	7,463.8	8,119.2	8,462.3	8,546.4
	Total	92,403.5	94,872.8	94,083.0	94,444.2	96,001.8	98,100.4	99,871.4	102,811.9	106,088.4
Grand Total		131,623.4	134,967.3	134,703.2	136,170.3	137,671.7	140,086.6	142,296.9	145,989.3	150,577.5

Data Source: Corporate Personnel Data Warehouse, October Snapshot Files

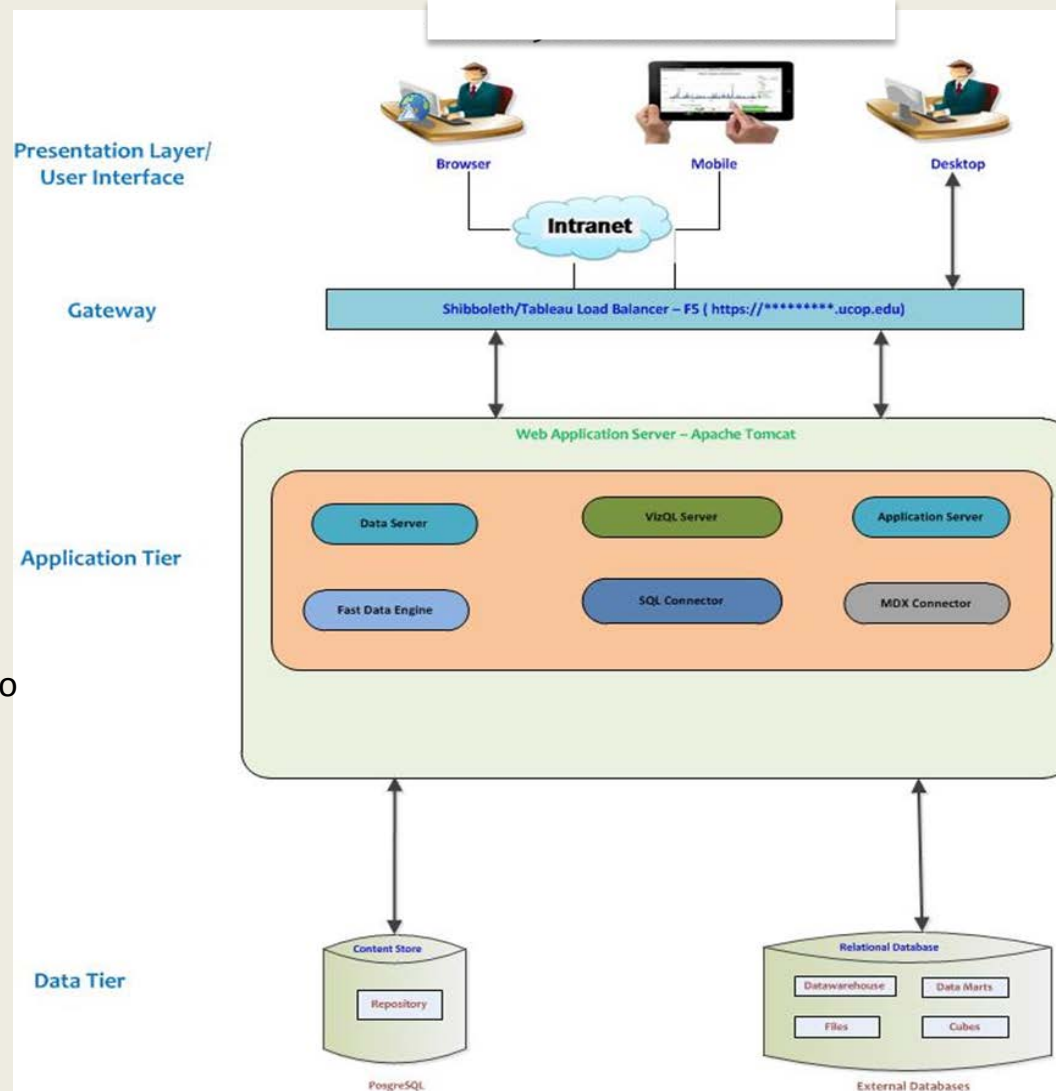


Tips &
Tricks

Tableau Server Architecture, Security and Implementation



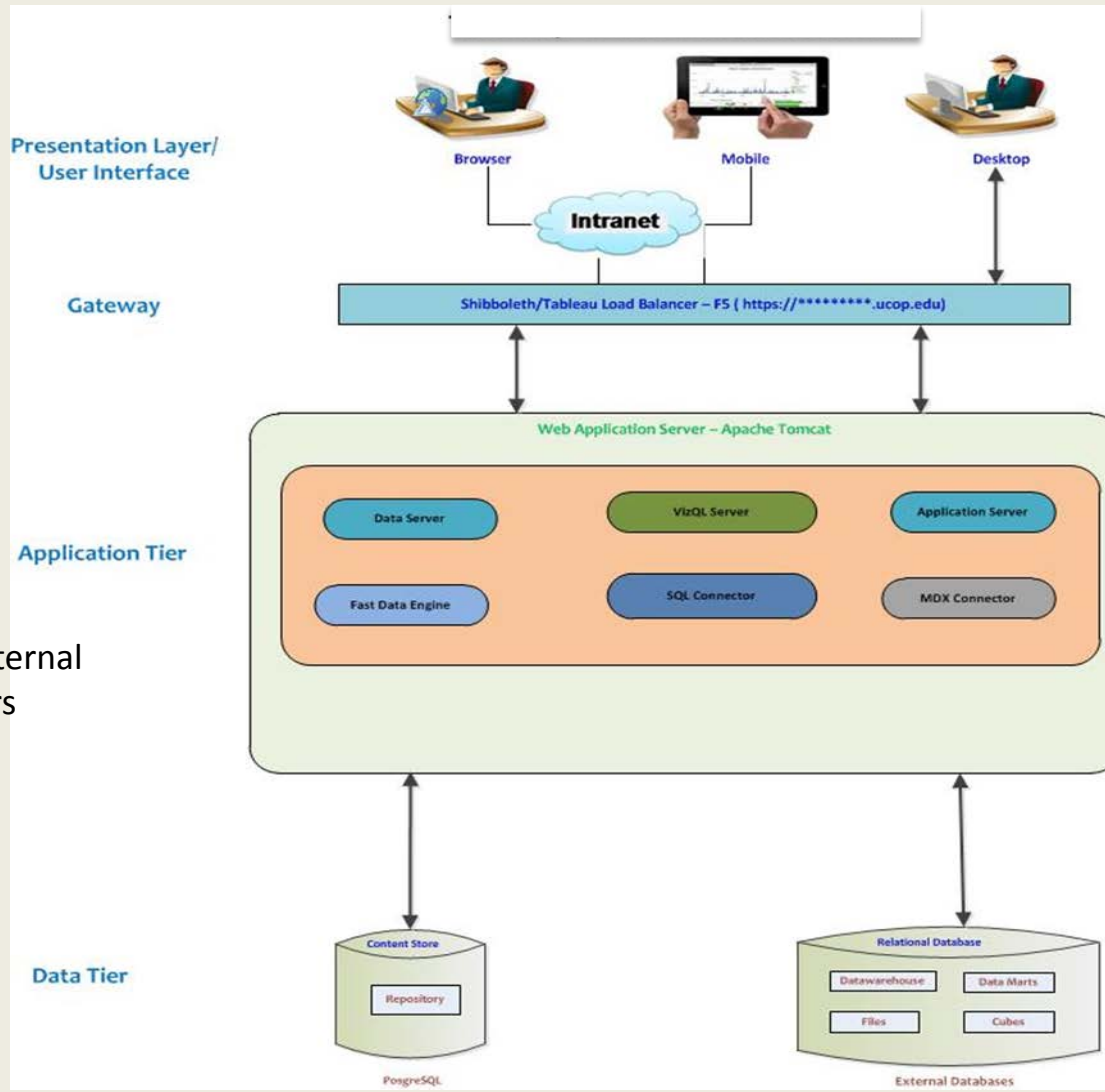
Tableau 10.0.1 QA Architecture



+ QA Server is internal to UCOP Users

CPU 8
RAM 64 GB
Windows Server
2012 R2

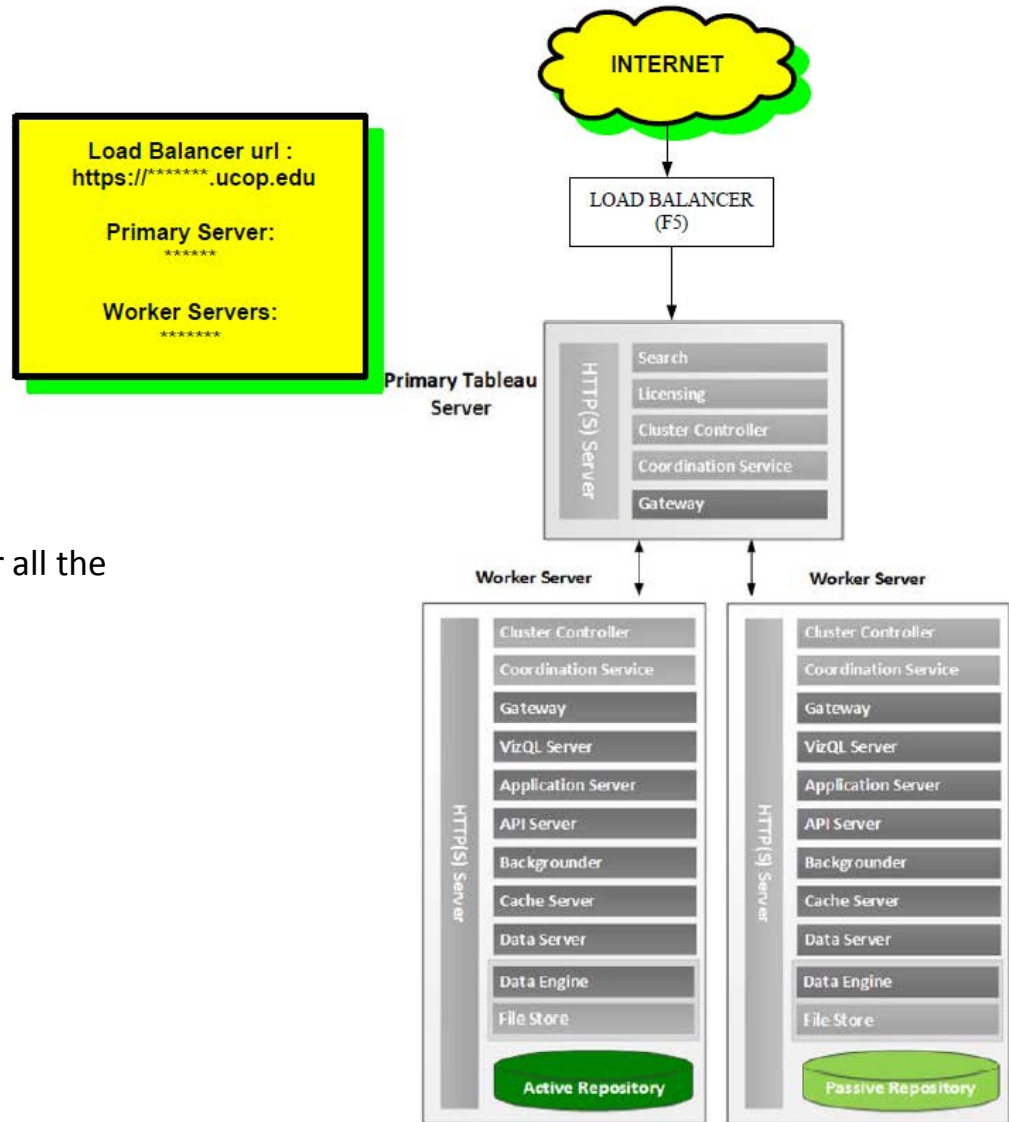
Tableau 10.0.1 UAT Architecture



+ UAT is for External Campus users

CPU 8
RAM 64 GB
Windows Server
2012 R2

Tableau 10.0.1 PROD Architecture



+ Interactor permission are set for all the users on Prod

CPU 24
RAM 192 GB
Windows
Servers2012 R2

UCOP Tableau Security



1. Define Sites

- + Define Sites for the respective Teams/Groups
- + --QA & UAT Sites are defined for Developers depending upon their ownership
- + --On Production Sites are defined based on the Audience/user base
- + Secure way of allowing different teams to define their own content
- + Provide Site Administrator Access to QA Server

2. Define Project within Sites

- + Define individual projects
- + Project is nothing but a folder which holds the visualizations/workbooks
- + Security can be define on individual projects

3. Define Groups/Roles

- + Server Administrator, Site Administrator, Publisher, Interactor, Viewer
- + Define Groups for the Project security
- + Add individual users to the groups instead of adding users separately
- + Membership is determined by site Administrators

Tableau UCOP Implementation & Support

Implementations

1. UC Info Center

- * <http://universityofcalifornia.edu/infocenter>
- * Embedded in Native Application

2. TES

- * <https://visualizedata.ucop.edu>
- * <https://qa.visualizedata.ucop.edu>
- * Integrated with AWS Data store in real-time

3. Dashboard with Extract Service now Data

4. Security implementation with in Dashboard.

5. Tableau Integration with SharePoint

Tableau UCOP Implementation & Support

TES Implementations

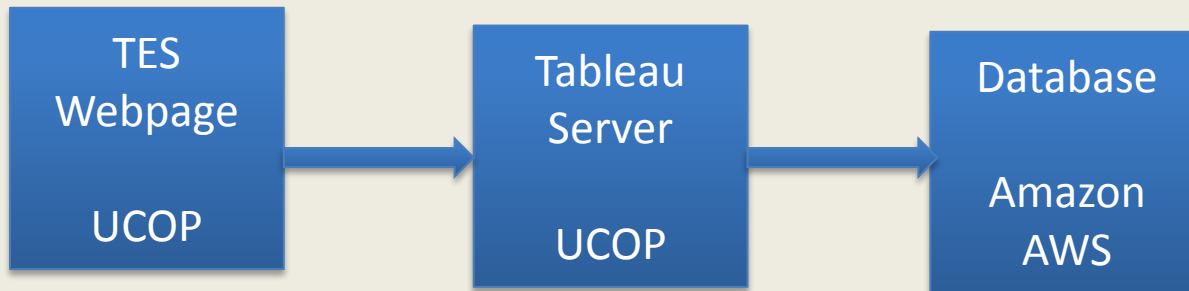


Tableau UCOP Implementation & Support

Dashboard with Extract

