

University of California Tableau User Group (TUG)

Hosted By:

UC Office of the President

10-14-16

Agenda

- Welcome/introductions
- Housekeeping
- A neat functionality
 - Dashboard Actions – Ryan Chan
- A Couple of useful design practices
 - Making dashboards that are irresistible – Tip #1
- Feedback on a viz in development
 - California Public School List – Jungwon Huh
- Useful tableau resources
- Great dashboard of the month
 - Gregory Boyer
- Next meeting
- Q & A

Audience First

- Who are your audience?
- What do they need to know?
- What do they already know?

Think in terms of:

1. Role
2. Workflow
3. Data Comfort & Skills
4. Business & Data Expertise

<http://universityofcalifornia.edu/infocenter/admissions-source-school>

	Questions	Implication
Role	<p>What decisions do they make?</p> <p>What questions do they need answered?</p>	Structure the information to make it super easy to answer high priority questions.
Work flow	<p>In what context will they be reviewing the dashboard?</p> <p>What information are they using on a daily basis?</p> <p>How much time do they have to review the numbers?</p>	The form and information display needs to fit into an existing work flow. For example, an on-the-road sales person may need information delivered to her BlackBerry, not designed for an online wide-screen monitor.
Data comfort and skills	<p>How sophisticated are they with using data?</p> <p>Are they proficient in Excel?</p> <p>Do they enjoy digging into the numbers?</p>	The dashboard's level of detail and analytical capabilities should match the audiences' comfort zone.
Business and data expertise	<p>How familiar are they with the key performance metrics?</p> <p>Do they understand where the data comes from?</p> <p>Are they familiar with internal company or industry terminology?</p>	This determines the need for embedded explanations and use of natural language.

Tableau Resources

- **Tableau Training Videos**
- Free online training provided by Tableau.
- <http://www.tableau.com/learn/training>

- **Tableau White Papers**
- White papers provide a simple high-level introduction to BI, Tableau, and how it can improve your business.
- <http://www.tableau.com/learn/whitepapers>

- **Tableau Webinars**
- On-demand and upcoming free webinars.
- <https://www.tableau.com/learn/webinars/>

- **On-going UC Discussions**
- Looking into Slack and other options for maintaining an on-going discussion

Surrounding User Groups

- **Berkeley Tableau User Group**
 - <http://www.meetup.com/Berkeley-Tableau-Meetup/>
- **San Francisco Bay Area Tableau User Group**
 - <http://www.meetup.com/San-Francisco-Bay-Area-Tableau-User-Group-SFBATUG/>
- **San Diego Tableau User Group**
 - <https://community.tableau.com/groups/san-diego>

Next Meeting

- 11/11/2016
 - Neat functionality
 - Making dashboards that are irresistible – Tip #2
 - Feedback on a viz in development
 - Useful resources
 - Great dashboard of the month

