

Data Strategy

-IPPS Analytics & Business Intelligence-

Objectives

01 Building A Foundation

Building A Foundation

Help our clients understand fundamental organizational data metrics.

02 Data Driven Culture

Data Driven Culture

Construct a business community from leadership to IPPSsters that responds to action driven data.

03 Business Consultations

Business Consultations

Uncover value in process data driven process improvements and program decision making.

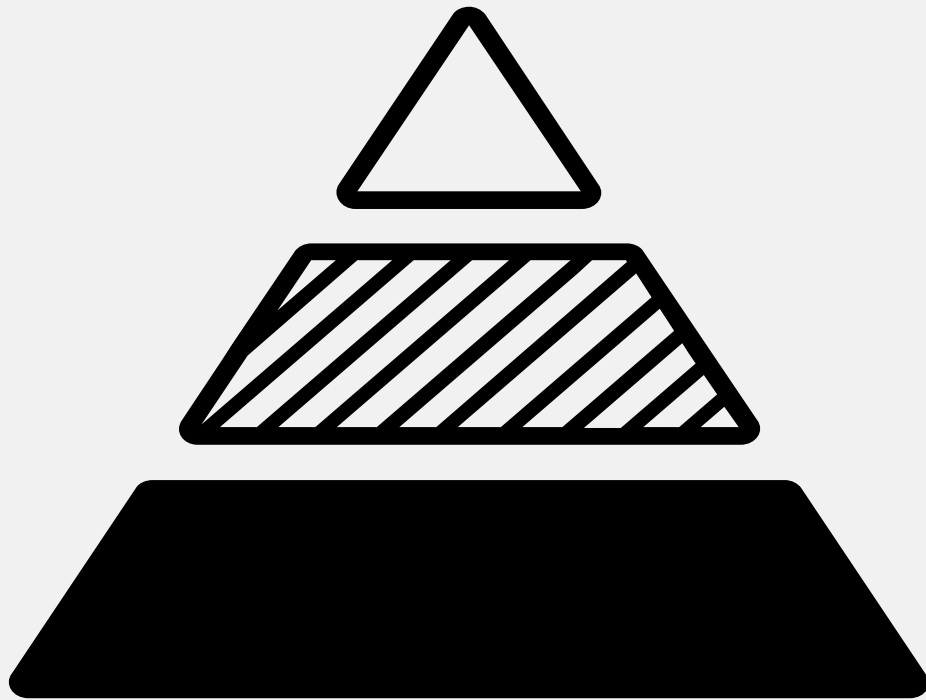
04 Predictive Modeling

Predictive Modeling

Utilize Machine Learning techniques to predict future events and understand complex relationships in data.

Strategy

Road mapping how to achieve objectives.



01

Tier 1 - Monitor

Understanding business wide objectives, goals, and progress.

02

Tier 2 – Strategy

Focusing on unit programs to analyze and develop long-term strategy.

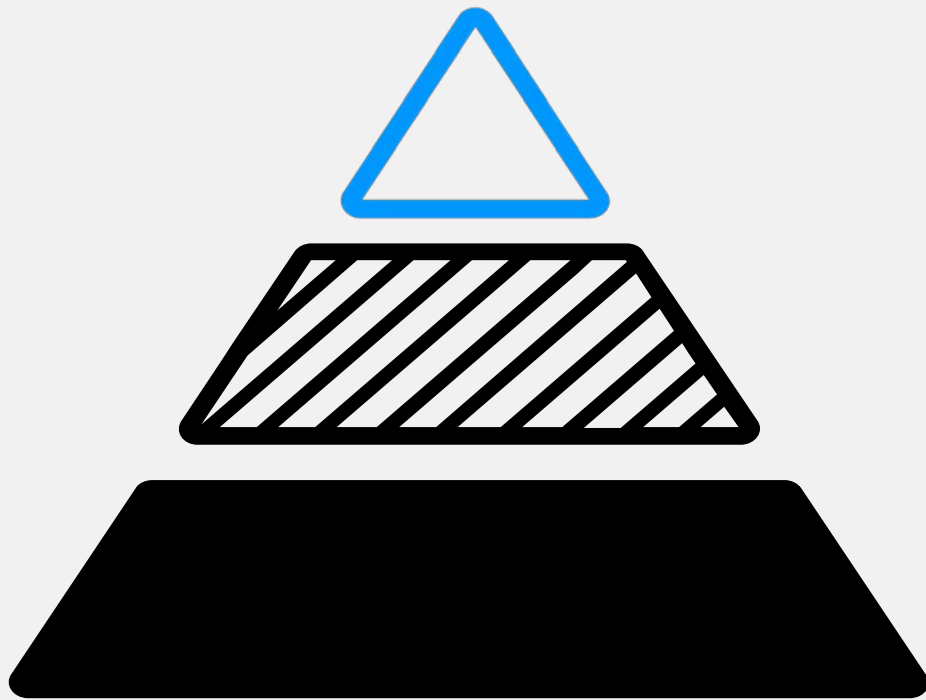
03

Tier 3 – Execute

Holistic operational management to create action triggers and influence output.

Strategy

Road mapping how to achieve objectives.



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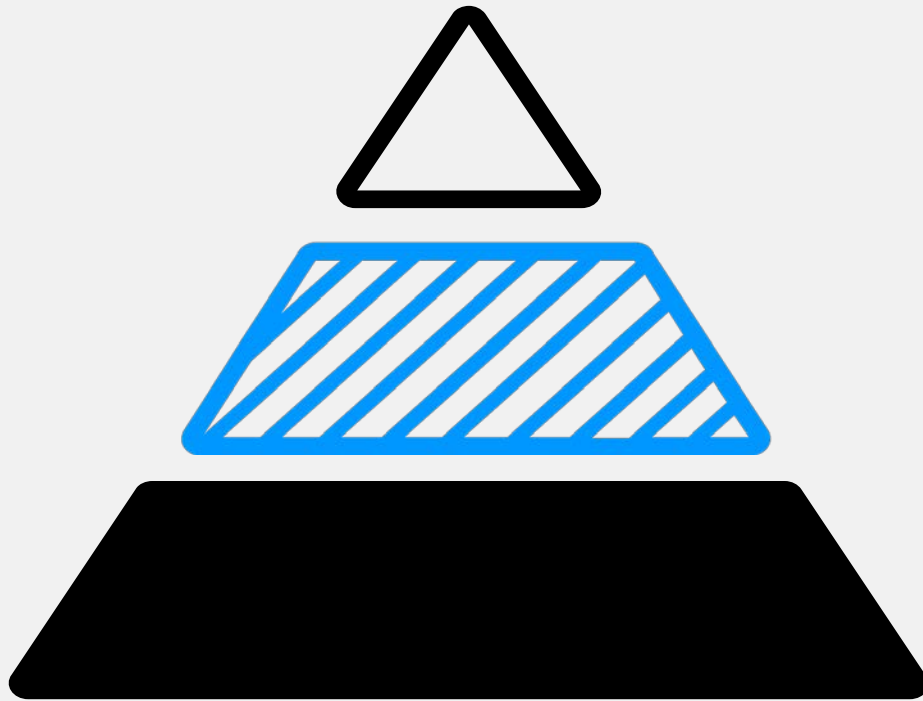
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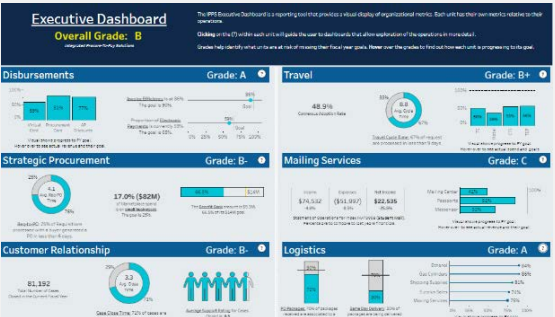


CRM

IPPS values client interaction & feedback in order to continue to support world class education and research.

Client Relationship Management (ASK)

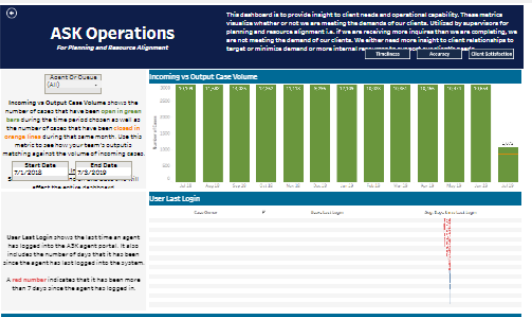
Dashboard Suite



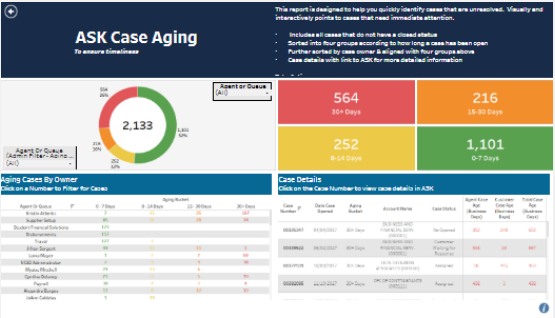
Executive Dashboard: Tier 1



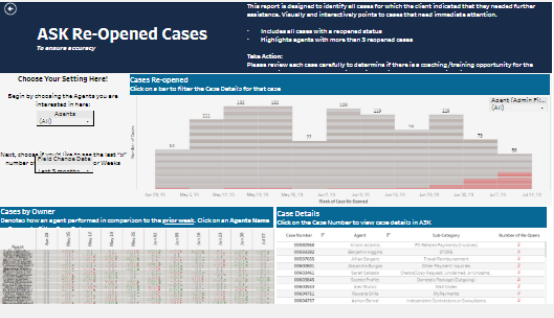
ASK Dashboard: Tier 2



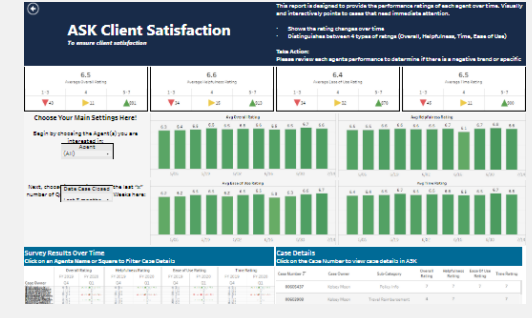
ASK Operations: Tier 3



ASK Case Aging: Tier 3



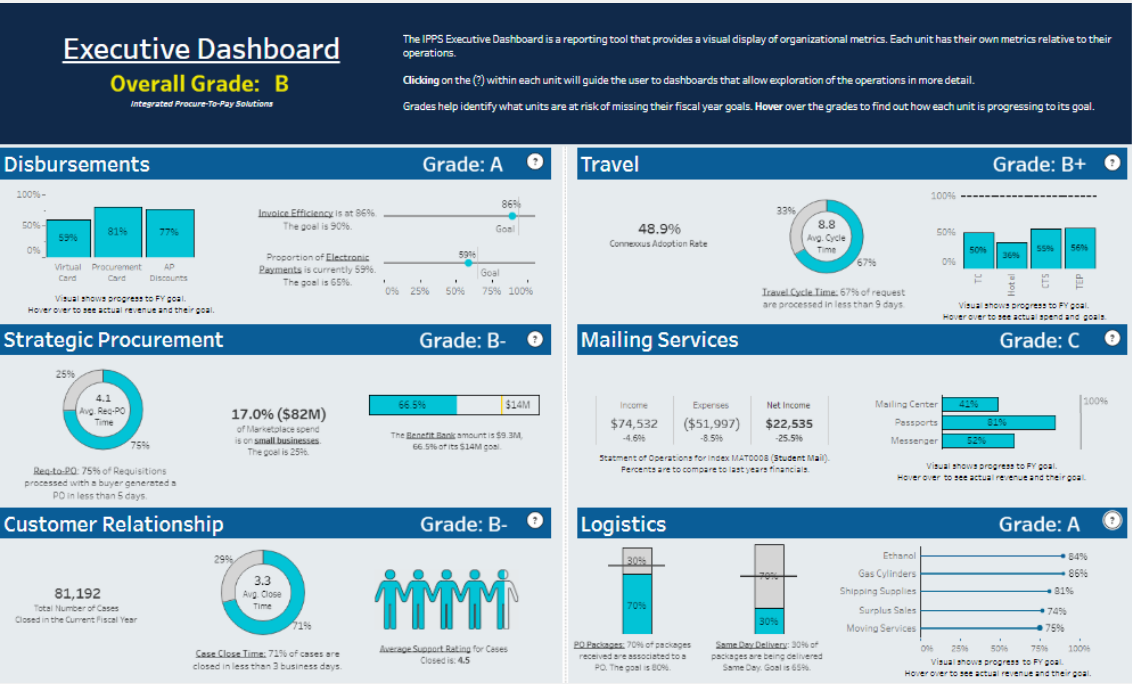
ASK Re-Opened: Tier 3



ASK Client Satisfaction: Tier 3

IPPS Executive Dashboard

Tier 1: Monitoring



01

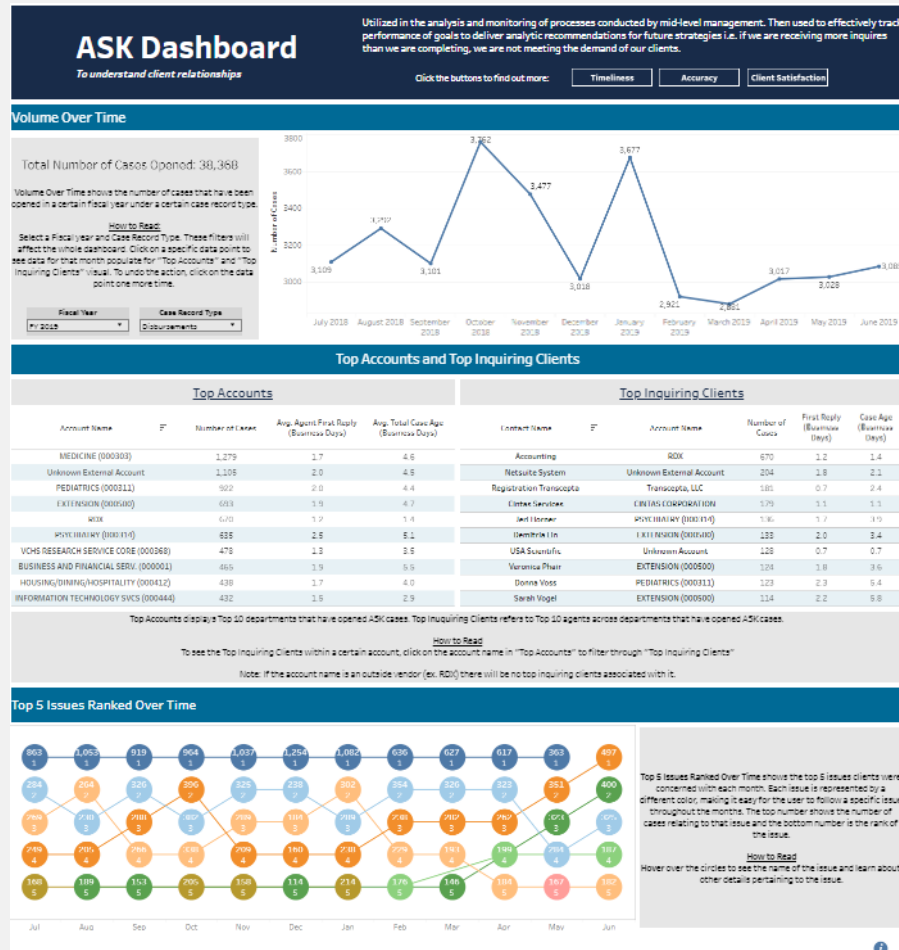
Monitor The Organization
Create goals, measure against goals, and track progress.

02

Leadership View
High-level view to understand the pulse of the organization.

ASK Dashboard

Tier 2: Strategy



01

Focus on Program

Focusing on the overall health of one program within the organization.

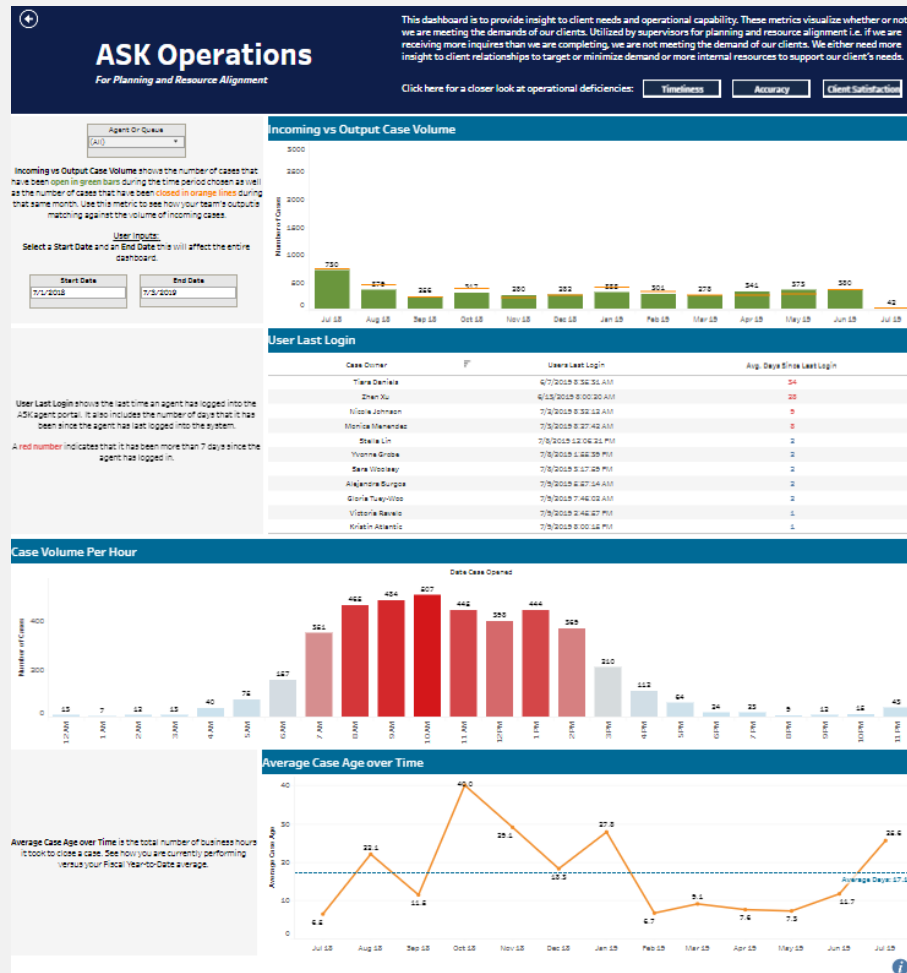
02

Supervisor's Strategize

Analyze data to create strategies to pilot the direction of the program.

ASK Operations

Tier 3: Execution



01

Program's Behaviors

Taking a look at what behaviors are occurring within the program.

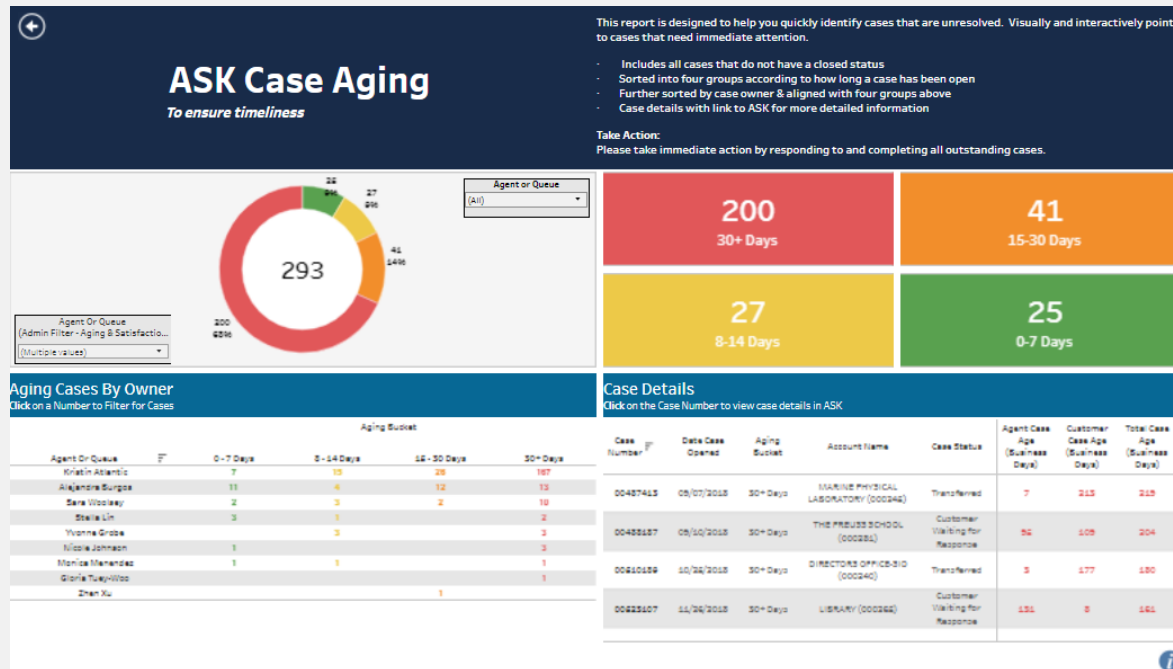
02

Managing Workload

Helping Managers understand the operation on a day-to-day basis.

ASK Operations

Tier 3: Execution



01

Goal 1: Timeliness

Ensure that Clients are receiving responses from Agents in a timely manner.

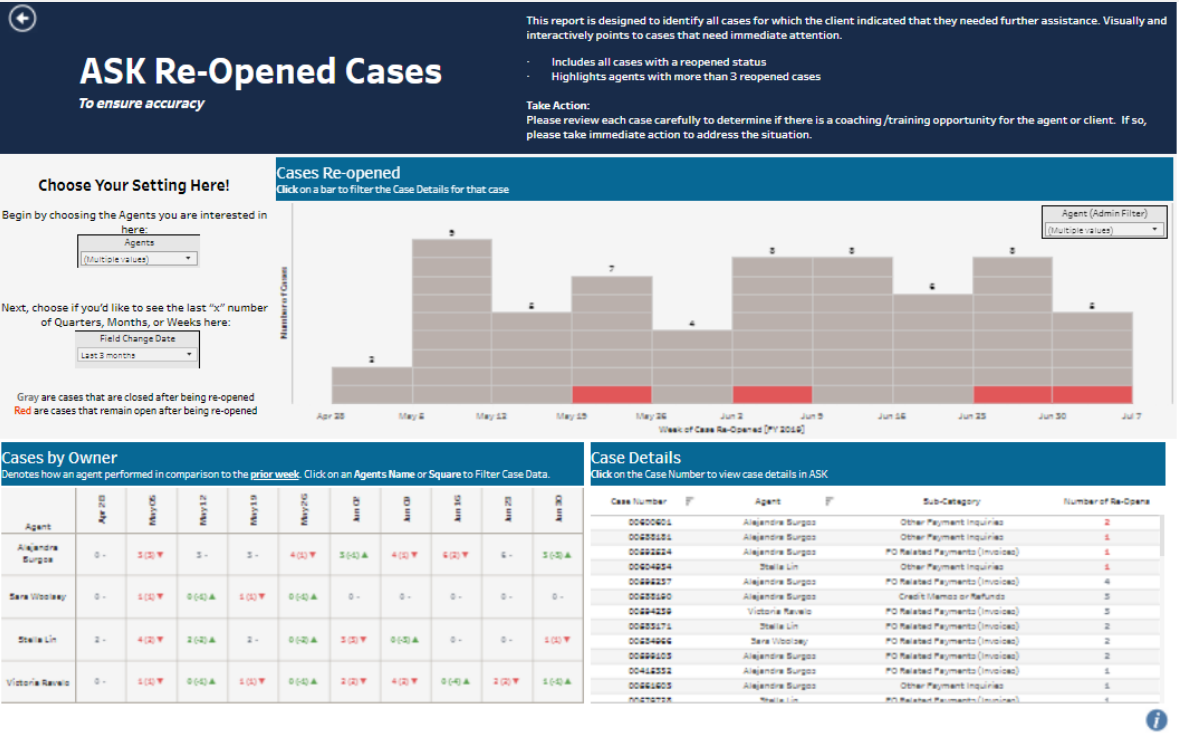
02

Agent Action!

Data is set up to tell Agents where to focus their efforts.

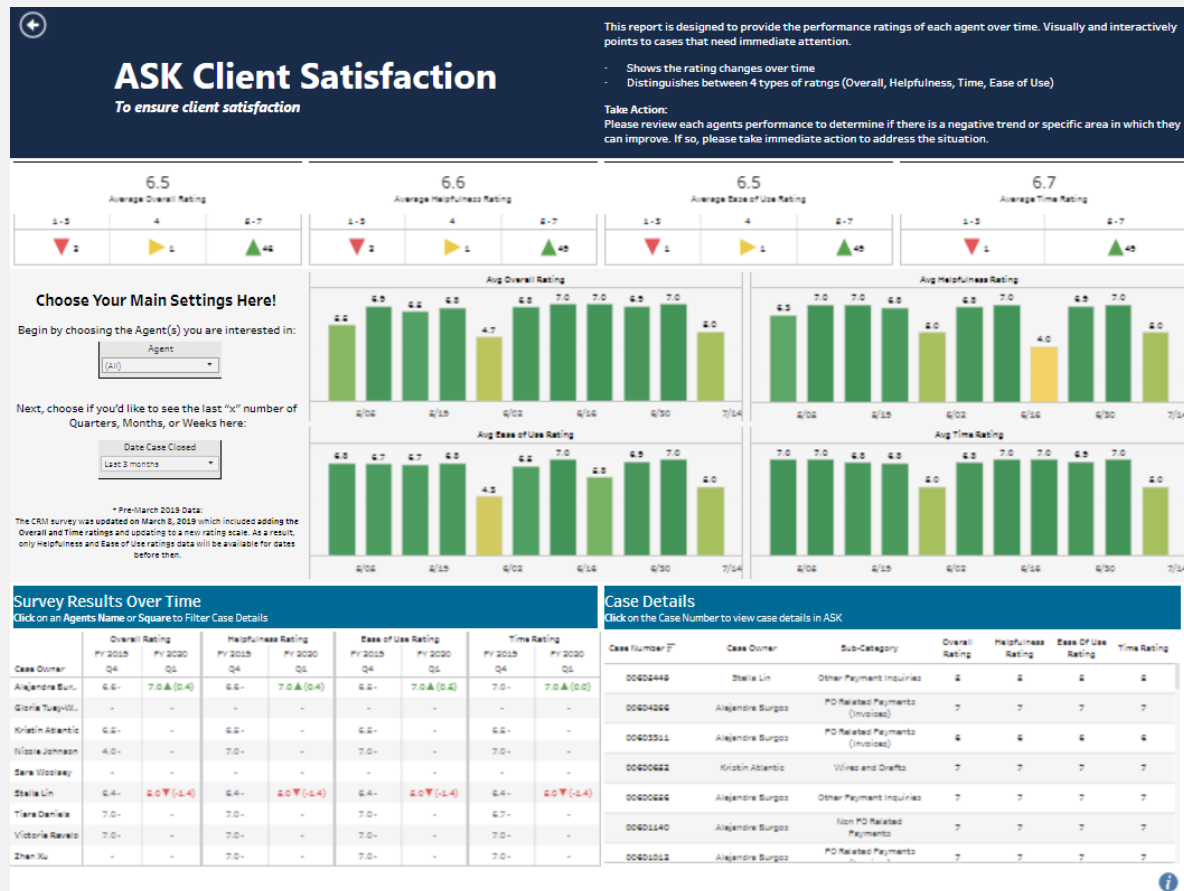
ASK Operations

Tier 3: Execution



ASK Operations

Tier 3: Execution



01

Goal 3: Client Satisfaction

Understand how Clients view our service.

02

Agent Action!

Data is set up to tell Agents where to focus their efforts.

Mobilize Data

Leveraging Tableau Server



View: Original



Alert



Subscribe



Edit



Share

01

Multiply Your Dashboards

Leverage Views to create multiple versions of the same dashboard!

03

Send Alerts

Send dashboard audience alerts if action needs to be taken.

02

Subscribe Your End Users

Build a user base that will utilize your data.

04

Involve Program Managers

Program managers are key to the success of your dashboards.

Summary

01. Identify Objectives

02. Devise a Strategy

03. Find a Program

04. Build Action Dashboards

05. Disperse Information



Exporting from Tableau to Print Documents

A selection of options

Ryan Chan, UCOP

UC Tableau User Group, July 12, 2019

Problem statement

- Tableau is a great online interactive tool, but the default image export settings result in poor print-quality files.
- Here are some strategies we have employed to get graphics out of Tableau.
- We hope others can suggest more as well.

Methods

- Copy Image from Tableau Desktop (BAD)
- Export PNG, BMP or JPG from Tableau Desktop (BAD)
- Export EMF from Tableau Desktop (good most of the time)
- Print to PDF from Tableau Desktop (good, but cannot put into MS Office)
- Export hi-res PNG from Tableau Server (good)
- Use the Tableau API (good, but advanced)

Copy Image from Tableau Desktop

- This will give you a screen-resolution image. This is ok if you just need a screenshot, but will not print or scale well.

Export PNG, BMP or JPG from Tableau Desktop

- You cannot choose what resolution to export from Tableau desktop, so the resulting image will also be only screen-quality and not print or scale well.

Export EMF from Tableau Desktop

- This will create a “vector” image, meaning that it can scale to any size.
- Beware: if your dashboard is especially complex, or uses unusual fonts, the EMF may not render correctly. We have had issues with words turning upside down, etc.

Print to PDF from Tableau Desktop

- This will create a vector file.
- Unlike an EMF, you cannot insert this image into an MS Office document without losing the vector quality.

Export a hi-res PNG from Tableau Server

- Requires Tableau server.
- Simply append `?:pixelratio=n` to your URL
- `http://[server name here]/#/views/[workbook name here]/[workbook name here]?:pixelratio=1` (any value 1 to 10)
- Typically we use 3 or 4 to get a PNG that works well for typical documents. If you are going to print a poster or such, you can increase the size.

Use the Tableau API

- You need to create an API account on the server.
- Reference the API documentation [here:](https://onlinehelp.tableau.com/current/api/rest_api/en-us/REST/rest_api_ref.htm#query_view_image)
https://onlinehelp.tableau.com/current/api/rest_api/en-us/REST/rest_api_ref.htm#query_view_image
- I recommend Postman to help develop your API calls, and Python to create a script

Sample Script

```
import requests
import shutil

ids=['dfb9282d-20d7-4ce9-93ba-0e80f493fbf1']

campuses=['Berkeley','Davis','Irvine','Los Angeles','Merced','Riverside','San Diego','Santa Barbara','Santa Cruz']

for campus in campuses:

    counter=3
    for id in ids:
        url = "https://qa.visualizedata.ucop.edu/api/3.0/sites/a6e0e455-757e-4d4e-b1bd-c952652f8cb6/views/"+id+"/image?vf_Campus%20Parameter="+campus

        querystring = {"resolution":"high","":"",""}

        headers = {
            'X-Tableau-Auth': "MASKED",
            'cache-control': "no-cache"
        }

        response = requests.request("GET", url, headers=headers,
                                     params=querystring,stream=True)

        with
open('C:\\Users\\rchan\\Documents\\campus\\'+campus+str(counter)+'.png','wb') as
out_file:
            shutil.copyfileobj(response.raw, out_file)
            counter+=1
```

A dark blue square graphic is positioned on the left side of the slide, partially overlapping the blue background.

Thank you!

Irvin Palacios – ipalacio@ucsd.edu

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Thank you!

Ryan Chan – Ryan.Chan@ucop.edu