University of California
Tableau User Group (TUG)

Hosted By:
UC Office of the President
Institutional Research & Academic Planning (IRAP)
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Agenda

• Welcome/Introductions
• Tableau Integration with R – Brianna Moore-Trieu
• Tableau Integration with Cognos – Sanketh Sangam
• Tableau Accessibility updates since 10.2 – Ryan Chan
• Q&A
Integration of R with Tableau

• Install R and R Server
  install.packages("Rserve")
  library(Rserve)
  Rserve()

• Connect Tableau to R
  Help menu and select "Manage External Connection". Enter a server name of "Localhost" (or "127.0.0.1") and a port of "6311". Test the connection

• Example of Statistical Analysis in Tableau using R
  Chi-square to check for differences in graduation rates between groups

• Other resources for using Tableau with R
  Integrate Tableau and R White paper
  Clustering
  Logistic Regression
Tableau & Cognos Integration

• Project: Display reference tables in a tabular format

• Challenges: Tableau does not provide horizontal scroll bar in the dashboard for the dimension columns

• Advantages: Tableau allows users to view dashboards without any login account. Cognos helps to create reports with data in desired tabular format
Tableau & Cognos Integration

• Create Cognos report using a generic or guest account
• Embed Cognos report into tableau dashboard using the cognos action URL
• Verify cognos account details and turn off viewer header and toolbar in the action URL
• Publish the dashboard to a webpage
Accessibility in Tableau

• Remember, accessibility benefits everyone!

• **Best Practices:**
  – Keep it simple
  – Titles and captions
  – Additional text
  – Color and contrast

• Not all functions are keyboard navigable. For example, story points are not, but tabs are. Experiment!