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
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!
Data has been certified and vetted by expert in that area!
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
Dashboard of the Month

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.

Source: FY 2012 IPEDS Provisional Release Data Downloaded from http://nces.ed.gov/ipeds/gap:
August 20, 2014
Responsibility for data accuracy resides with institution
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

<table>
<thead>
<tr>
<th>Service Focus</th>
<th>Funding Source</th>
<th>Career Status</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Personnel</td>
<td>Academics</td>
<td>39,219.9</td>
<td>40,094.5</td>
</tr>
<tr>
<td>Total</td>
<td>39,219.9</td>
<td>40,094.5</td>
<td>40,620.3</td>
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<tr>
<td>Non-Academic Personnel</td>
<td>Senior Management Group (SMG)</td>
<td>284.1</td>
<td>292.8</td>
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<tr>
<td>Managers (M)</td>
<td>4,269.9</td>
<td>4,427.7</td>
<td>4,451.4</td>
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<td>Senior Professionals (SP)</td>
<td>3,290.0</td>
<td>3,519.7</td>
<td>3,730.6</td>
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<tr>
<td>Professional &amp; Support Staff (PSS) - Non Students</td>
<td>77,914.4</td>
<td>79,721.3</td>
<td>78,817.3</td>
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<td>Student Staff</td>
<td>6,664.0</td>
<td>6,911.4</td>
<td>6,786.6</td>
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<tr>
<td>Total</td>
<td>92,463.5</td>
<td>94,572.8</td>
<td>94,083.0</td>
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<td>Grand Total</td>
<td>131,623.4</td>
<td>134,967.3</td>
<td>134,763.2</td>
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</tbody>
</table>

Data Source: Corporate Personnel Data Warehouse, October Snapshot File

4/10/2017
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

CPU 8
RAM 64 GB
Windows Server 2012 R2

+ UAT is for External Campus users
Tableau 10.0.1 PROD Architecture

CPU 24
RAM 192 GB
Windows
Servers 2012 R2

+ Interactor permission are set for all the users on Prod
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
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**TES Implementations**

- TES Webpage
- UCOP
- Tableau Server
- UCOP
- Database
- Amazon AWS
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Dashboard with Extract

UCOP Tableau Server

Service Now Cloud Database