Objectives

Building A Foundation
Help our clients understand fundamental organizational data metrics.

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

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

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

Road mapping how to achieve objectives.

Tier 1 - Monitor
Understanding business wide objectives, goals, and progress.

Tier 2 – Strategy
Focusing on unit programs to analyze and develop long-term strategy.

Tier 3 – Execute
Holistic operational management to create action triggers and influence output.
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Holistic operational management to create action triggers and influence output.
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
Tier 1: Monitoring

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

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.
Tier 3: Execution

**Program’s Behaviors**
Taking a look at what behaviors are occurring within the program.

**Managing Workload**
Helping Managers understand the operation on a day-to-day basis.
Goal 1: Timeliness
Ensure that Clients are receiving responses from Agents in a timely manner.

Agent Action!
Data is set up to tell Agents where to focus their efforts.
Goal 2: Accuracy
Enforce accuracy in the responses from Agents to our Clients.

Agent Action!
Data is set up to tell Agents where to focus their efforts.
ASK Operations

Tier 3: Execution

Goal 3: Client Satisfaction
Understand how Clients view our service.

Agent Action!
Data is set up to tell Agents where to focus their efforts.
Mobilize Data
Leveraging Tableau Server

01 Multiply Your Dashboards
Leverage Views to create multiple versions of the same dashboard!

02 Subscribe Your End Users
Build a user base that will utilize your data.

03 Send Alerts
Send dashboard audience alerts if action needs to be taken.

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

```python
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
```
Thank you!
Ryan Chan – Ryan.Chan@ucop.edu