

Navigating the Tableau Server

Tableau Server Hierarchy:

1. Site – A collection of users, groups, workbooks, and dashboards that are separated from other content on the Tableau Server. At Colgate, we designed sites to align with Divisions across the University.
2. Projects – a collection of data and content for organizational consumption. At Colgate, we designed projects to align with the various departments within a division.
3. Workbooks – User developed content for consumption. Workbooks may contain one or more views or dashboards.
4. Dashboards – A collection of views which allows the user to compare a variety of data simultaneously.

You may have access to multiple sites and multiple workbooks within a site/project.

Here's a snapshot of the sites available to me when signing in directly to tableau.colgate.edu:



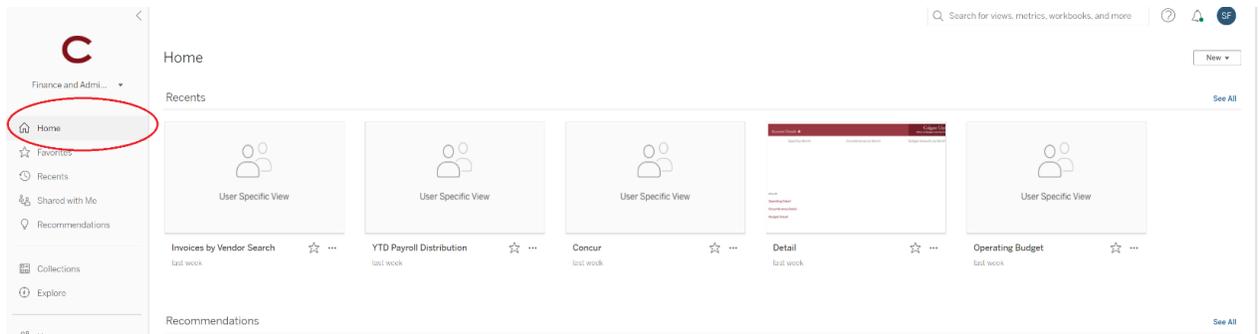
COLGATE
UNIVERSITY



Select a Site

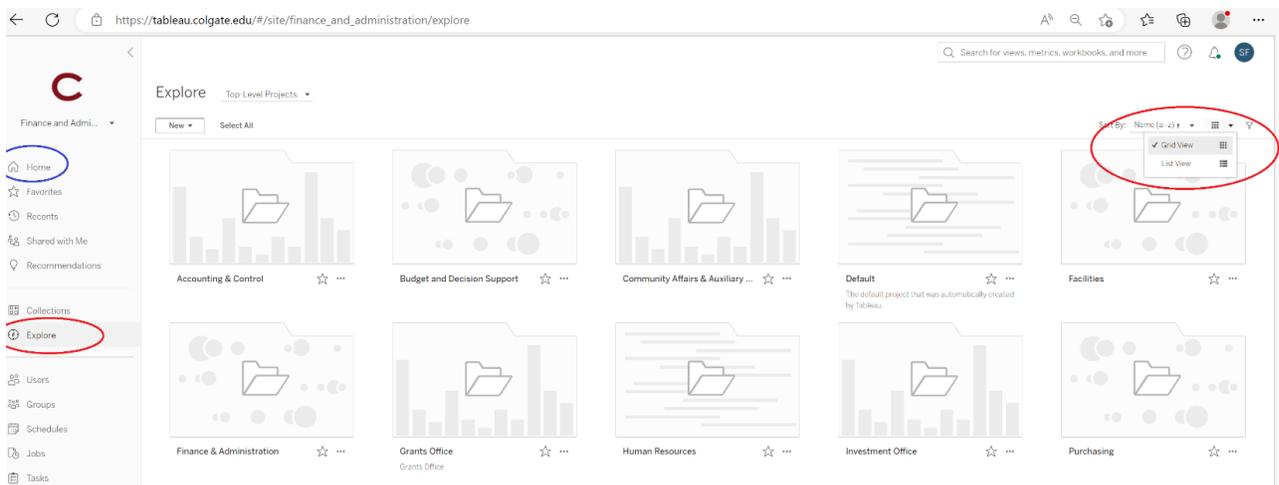
- ACADEMICS
- Advancement
- Colgate
- COVID-19
- ENROLLMENT DATA
- Finance and Administration
- ITS
- Office of Admission and Financial Aid
- Office of Institutional Analysis
- Tableau User Group (TUG)
- Vaccinations

I've selected the Finance and Administration site. Upon entering the site, you will be brought to the Home page. The Home Page displays recently accessed dashboard as well as Recommendations.



I've now clicked on the Explore button to see the current Projects within this site. Please note, you can use the Change View Mode icon to the right of the page to change to a list view.

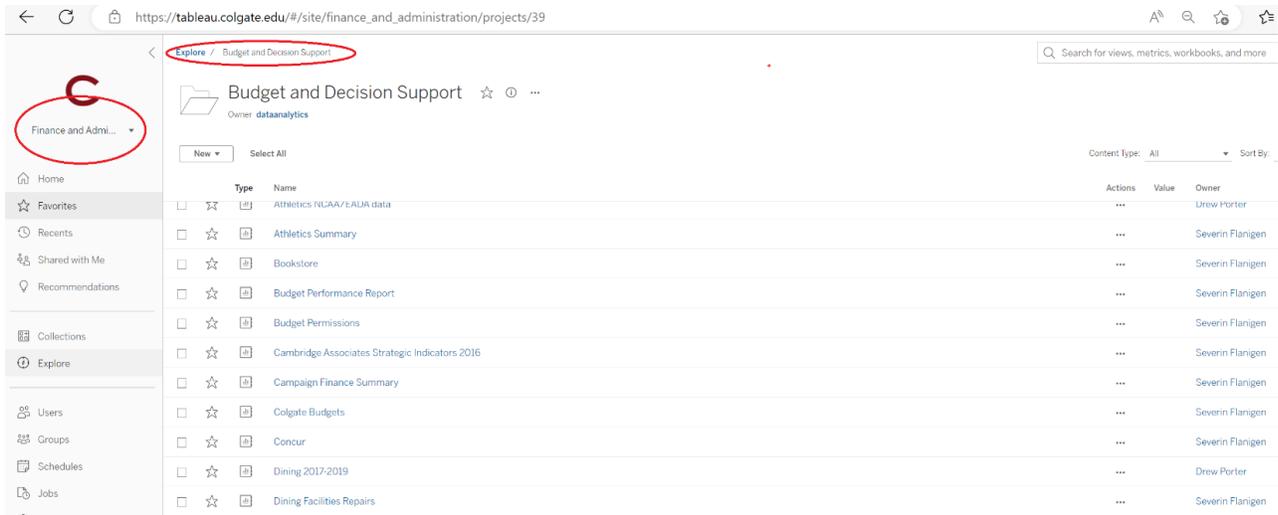
Grid View:



List View:

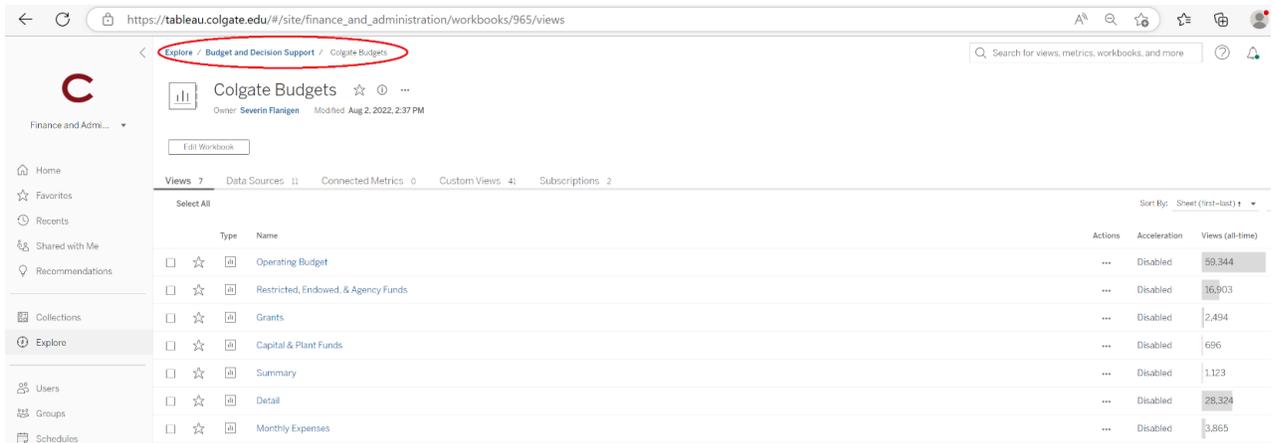
Type	Name	Actions	Projects	Workbooks	Views	Data sources	Owner	Created
📁	Accounting & Control	...	0	5	10	1	Severin Flanigan	Jun 5, 2018, 1:44 PM
📁	Budget and Decision Support	...	0	44	120	31	dataanalytics	Jul 5, 2017, 1:09 PM
📁	Community Affairs & Auxiliary Services	...	0	1	2	1	Severin Flanigan	Oct 21, 2019, 2:36 PM
📁	Default	...	0	0	0	0	Drew Porter	Jul 5, 2017, 12:44 PM
📁	Facilities	...	0	5	8	1	Severin Flanigan	Feb 26, 2018, 3:25 PM
📁	Finance & Administration	...	0	3	7	0	Severin Flanigan	Apr 13, 2018, 1:05 PM
📁	Grants Office	...	0	2	4	1	Tim Borfritz	Mar 30, 2021, 2:54 PM
📁	Human Resources	...	0	17	39	2	Severin Flanigan	Jul 19, 2017, 4:42 PM
📁	Investment Office	...	0	2	11	0	dataanalytics	Jul 5, 2017, 4:16 PM
📁	Purchasing	...	0	1	1	0	Severin Flanigan	Apr 18, 2018, 4:29 PM

Let's explore the Budget and Decision Support project. Permissions are granted at a workbook/dashboard level, so what you see may be different than what I'm displaying here. Tableau informs the user where they are on the servers. You can see that I'm on the Finance and Administration site and the Budget and Decision Support project.



Now, we'll go into the workbook, Colgate Budgets. The navigation path shows the user where they are on the server. You can use the navigation path to move back to the Budget and Expense content or back further to the project listing by clicking on Explore.

There are seven Views (or dashboards) in this workbook. This workbook uses eleven data sources to bring the content to the dashboard(s). You can use the navigation path to move back to the Budget and Expense content or back further to the project listing by clicking on Explore.



Let's click on the *Operating Budget* to learn a little more about the Tableau Server environment.

Note the navigation path continues to show the user where they are on the site. There will be a star immediately to the right of the network path that allows users to make the dashboard a favorite. This creates a link to the dashboard from the Favorites section.

The icons in the blue ribbon section allows the user to Undo an action, Redo an action, Reset the View, Refresh data to the view, Pause Refresh, and you can even create your own customized views. We'll dive deeper into this feature in the training. Users can also download a pdf or the data if they choose to.

