Tableau

Introduction

The Tableau workspace is a powerful and fast growing data visualization tool. Tableau simplifies raw data into easily understandable visual formats. Users can analyze data and create various forms of dashboards and worksheets quickly and easily. With its easy navigation and configuration tools, Tableau allows users to visualize all their data in one central location.

Launch Tableau

1 Select the **Tableau Reporting and Self-Service** Tab from the bottom of the NYSERDA Launch page.
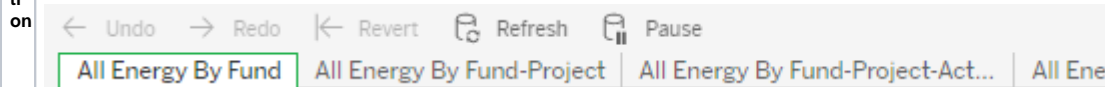
Office 365	Our Guiding Principles: Recognize a Colleague	Performance Measurement and Reporting	Policies, Procedures, and Reference Guides	Tableau Reporting and Self-Service

2 One the next screen, select either **Production** or **Self-Service**.

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Tableau Reporting and Self-Service

- **Production**
- **Self-Service**

| **Production**	The Production environment in Tableau gives users view/read-only access to all if its visualizations. Users can filter workbooks and vi: which they can save for later use. However, users cannot edit the data or visualizations beyond setting filters. Users can access a project report/workbook or dashboard directly through Tableau (as shown in **Tableau**) or through **Dashboard Ce Launch Page**. Once a user chooses and enters a dashboard, they can switch between different tabs of the workbook, similar to how Excel Workbook.
	← Undo → Redo ⊢ Revert Refresh Pause
	All Energy By Fund | All Energy By Fund-Project | All Energy By Fund-Project-Act... | All Ene
Self-Service	All users have web-edit access through the Self-Serving environment, where they can edit Tableau data and visualizations however th without affecting the original Tableau articles. To visualize data in different formats, click on **Show Me** and it proposes different types

3 Regardless of which option you choose, you'll be brought to Tableau's home page.
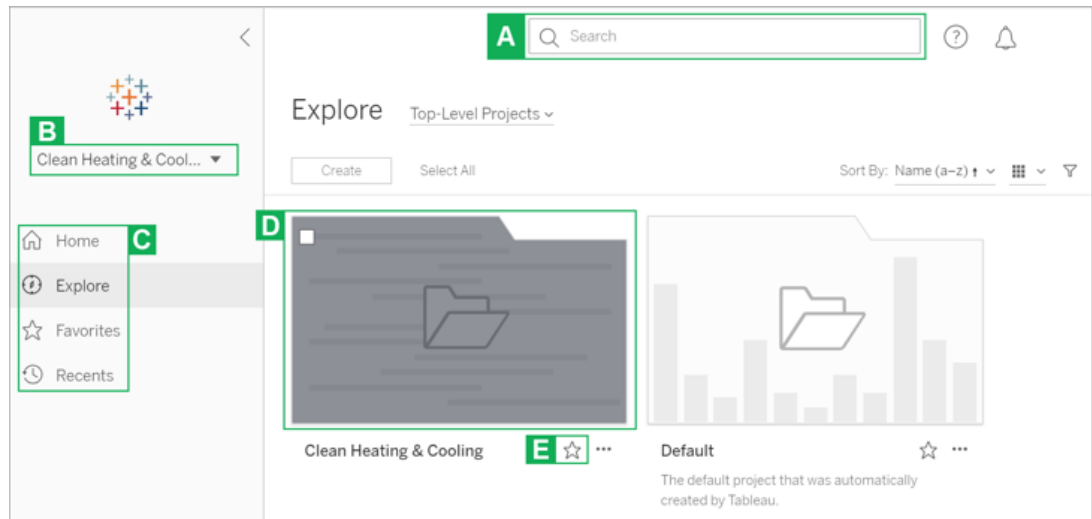
Letter	Function	Description
A	Search	Use the search engine to locate reports and sites within Tableau.
B	Site Selection	If you selected the wrong site when logging into Tableau Production, you can use this drop-down to navigate to other Tableau sites.
C	Controls	Use these controls to navigate between different Tableau views.
D	Report Folders	The folders shown in this section contain the varied reports and views stored in each Tableau site.
E	Favorite	Clicking this icon below any report folder or view will save the access link in your **Favorites** control option in the left hand navigation pane for easier access in the future.

Related Materials

Tableau: Visualization Tools

Tableau: Filters

Tableau: Sharing Data with External Stakeholders

Tableau: Downloading Tableau Data

Tableau: Self-Service Workspace Area

Tableau: The Pace of Commitment and Expenditure Report

Request Support

Tableau general users have read-only access to all dashboards and visualizations. Users can otherwise edit data as needed without making any changes to original visualizations in the Self-Service environment, which is a sandbox for further data analysis.

To access certain functionalities, detailed below, users must submit an IT Service Request Ticket to gain the correct permissions and software for the use-case.

Creating New Datasets and/or Dashboards in Tableau

A user is ecouraged to use the Dashboard Requirements template as a resource to think about the commen questions and the different features Tableau has, to help clearify the requirements needed for the Data Maps and Visualizations Team to generate the dashboard.
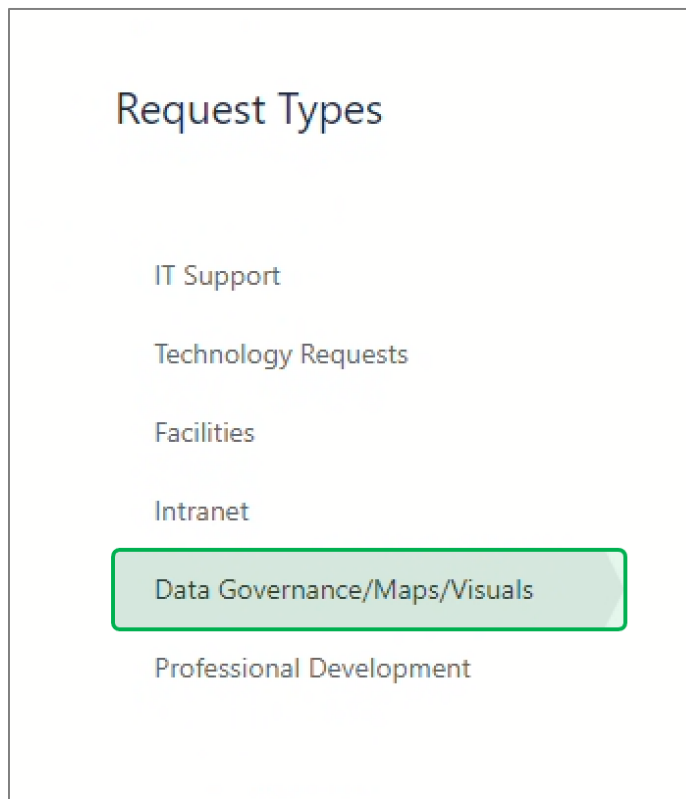
You should expect the **Data Maps and Visualizations Team** to reach out to schedule a discovery conversation upon submitting the ticket.

① Click on **Service Desk (IT & Facilitaties)** panel through the NYSERDA Launch Page.

② Scroll down on the page and click on the **Data Governance/Maps/Visuals** tab on the left.

Request Types

IT Support

Technology Requests

Facilities

Intranet

Data Governance/Maps/Visuals

Professional Development

③ Within the **Data Governance/Maps/Visuals** tab, select the **Data Sets, Maps and Visualizations** ticket type.

Request Types

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Professional Development

Request Project Lead Updates
To add or remove Project Leads to an existing External SharePoint Site.

Ask a Data Governance Question
If it's not any of these options or you just have a general question for Data Governance

Share Data With External Parties
Requires Data Governance approval. Share data with external parties via an external SharePoint site, SFTP or web link.

Information Asset Identification Worksheet
Classify the Confidentiality, Integrity, and Availability (CIA) of an Information Asset for approval by the Information Owner and Information Security Officer

Request a New Document Library or SharePoint List
Add a new document library or SharePoint list to an existing site.

Data Sets, Maps and Visualizations
Request assistance with Open NY data sets, GIS maps or report visualizations

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④ If the **Dashboard Requirement Template** was leveraged, drag and drop the template within the **Attachment** box.

Data Sets, Maps and Visualizations
NYSERDA Service Desk   ✕

Summary

Description *(optional)*

Attachment *(optional)*

📎 Drag and drop files, paste screenshots, or browse

Formatting Help   Create   Cancel

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⑤ Click **Create** at the bottom when complete to submit the ticket.

Request Tableau Desktop Software Access

(1)   Click on **Service Desk (IT & Facilitaties)** panel through the NYSERDA Launch Page.

(2)   Scroll down on the page and click on the **IT Support** tab on the left.

Request Types

IT Support

Technology Requests

Facilities

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Professional Development

③ Within the **IT Support** tab, select the **Software** Ticket Type.

Information Security
Report incidents, phishing attempts, URL filtering issues, URL access issues, website scans, and portable media scans

Email
Trouble sending, receiving or configuring email

Automation
Get help with automating processes such as Seamless Docs or Jira Workflows

Software
Help install, troubleshoot, or use a supported application

Hardware
Report issues with hardware devices such as physical damage or inability to charge

Ask a Question
If it's not any of these options or you just have a general question for IT

④ Click **Create** at the bottom when complete to submit the ticket.

Additional Resources

Tableau Learning

Tableau has a compilation of video tutorials, practical training, and documentation that users may use to better understand how to navigate through different Tableau functions. These are accessible through the **Learning** tab on the Tableau website, tableau.com. (This is a direct link to the Tableau website, NOT the Tableau Application.)

Data Plus Science Website

In addition to the Knowledge Base, you can access more Tableau Training by going to dataplusscience.com and accessing the **Tableau Reference Guide** in the **Learn More** section.