

# Tableau Server

## TRAINING WORKSHOP

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THE UNIVERSITY  
*of* NORTH CAROLINA  
*at* CHAPEL HILL

**Slides and Handouts**

**[go.unc.edu/tabserver](https://go.unc.edu/tabserver)**

**So You're a Site Admin  
Now What?**

**[go.unc.edu/tabadmin](https://go.unc.edu/tabadmin)**

# Server vs. Desktop

# Sever vs. Desktop

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SERVER	DESKTOP
Content produced on the <b>web</b>	Content produced <b>locally</b> and <b>shared on the web</b>
Content organized by <b>sites, projects and views</b>	Content organized by <b>files</b>
Security includes <b>2FA</b> and <b>permissions</b>	<b>No security</b> or passwords
Visualizations on UNC Tableau Server <b>cannot be shared publicly</b>	Can share public visualizations on <b>Tableau Public</b>
Some <b>features are limited</b> (especially design)	<b>Full access</b> to all features

# Permission Levels

# Permissions

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Role	Add Users & Projects	Create Data Sources	Create New Content	Save Content	View & Interact	Download Images
Site Administrator Creator	✓	✓	✓	✓	✓	✓
Site Administrator Explorer	✓	✗	✓	✓	✓	✓
Creator	✗	✓	✓	✓	✓	✓
Explorer (can publish)	✗	✗	✓	✓	✓	✓
Explorer	✗	✗	✓	✗	✓	✓
Viewer	✗	✗	✗	✗	✓	✓

# Data in Tableau



# Data in Tableau

## Data Structure

country	year	cases	population
Afghanistan	1999	3745	19987071
Afghanistan	2000	2666	20595360
Brazil	1999	37737	172006362
Brazil	2000	80488	174604898
China	1999	212258	1272915272
China	2000	213766	128042583

variables

country	year	cases	population
Afghanistan	1999	3745	19987071
Afghanistan	2000	2666	20595360
Brazil	1999	37737	172006362
Brazil	2000	80488	174604898
China	1999	212258	1272915272
China	2000	213766	128042583

observations

country	year	cases	population
Afghanistan	1999	3745	19987071
Afghanistan	2000	2666	20595360
Brazil	1999	37737	172006362
Brazil	2000	80488	174604898
China	1999	212258	1272915272
China	2000	213766	128042583

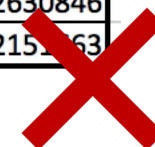
values

Source: [garrettgman.github.io/tidying/](https://garrettgman.github.io/tidying/)

# Data in Tableau

What's wrong with this spreadsheet? How do we fix it?

	A	B	C	D	E
1	Year	Undiagnosed Diabetes		Prediabetes	
2		Proportions	Population estimates	Proportions	Population estimates
3	2000	0.0185	172469	0.1776	1655699
4	2001	0.1156	1077696	0.399	3719729
5	2002	0.0422	393415	0.2897	2700765
6	2003	0.0711	662839	0.2298	2142340
7	2004	0.0319	297392	0.2822	2630846
8	2005	0.0379	353328	0.2308	2151163
9					

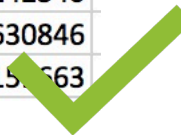


# Data in Tableau

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## Solution

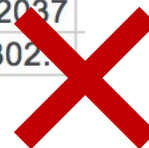
G	H	I	J
Year	Diagnosis Type	Proportions	Population estimates
2000	Undiagnosed	0.0185	172469
2001	Undiagnosed	0.1156	1077696
2002	Undiagnosed	0.0422	393415
2003	Undiagnosed	0.0711	662839
2004	Undiagnosed	0.0319	297392
2005	Undiagnosed	0.0379	353328
2000	Prediabetes	0.1776	1655699
2001	Prediabetes	0.399	3719729
2002	Prediabetes	0.2897	2700765
2003	Prediabetes	0.2298	2142340
2004	Prediabetes	0.2822	2630846
2005	Prediabetes	0.2308	2155563



# Data in Tableau

What's wrong with this spreadsheet? How do we fix it?

I	J	K	L	M	N	O	P	Q
	2000				2001			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Revenue	1517	1248	1677	1393	1558	1368	1790	1396
US GDP	12359.1	12592.53	12607.68	12679.34	12643.28	12710.3	12670.11	12705.27
Europe GDP	1728.244	1749.6	1769.259	1789.253	1819.14	1833.713	1845.879	1861.936
CHN GDP	257.6491	290.4375	310.551	352.6953	290.9745	322.9186	342.3183	383.2037
Price Index	246.5	326.4	322.5	321	329.4	329.8	313.3	302



# Data in Tableau

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## Solution

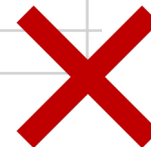
	A	B	C	D	E	F	G
1	Year	Quarter	Revenue	US GDP	Europe GDP	CHN GDP US	Price Index
2	2000	1	1517	12359.1	1728.244	257.6491	246.5
3	2000	2	1248	12592.53	1749.6	290.4375	326.4
4	2000	3	1677	12607.68	1769.259	310.551	322.5
5	2000	4	1393	12679.34	1789.253	352.6953	321
6	2001	1	1558	12643.28	1819.14	290.9745	329.4
7	2001	2	1368	12710.3	1833.713	322.9186	329.8
8	2001	3	1790	12670.11	1845.879	342.3183	313.3
9	2001	4	1396	12705.27	1861.936	383.2037	312.1



# Data in Tableau

What's wrong with this spreadsheet? How do we fix it?

H	I	J	K	L	M	N
App Name	Rating	Reviews	Category	Updated		
Fast Tract Diet	4.4	35	Health & Fitness	8-Aug-18		PAID APPS
Trine 2: Complete Story	3.8	252	Action	27-Feb-15		FREE APPS
sugar, sugar	4.2	1405	Puzzle	5-Jun-18		
Word Search Tab 1 FR	3	1	Puzzle	6-Feb-12		
Photo Editor & Candy Camera	4.1	159	Art & Design	7-Jan-18		
Coloring book moana	3.9	967	Art & Design	15-Jan-18		
U Launcher Lite	4.7	87510	Art & Design	1-Aug-18		
Sketch - Draw & Paint	4.5	215644	Art & Design	8-Jun-18		
Pixel Draw	4.3	967	Art & Design	20-Jun-18		



# Data in Tableau

## Solution

A	B	C	D	E	F
App Name	Type	Rating	Reviews	Category	Updated
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# Data in Tableau

What's wrong with this spreadsheet? How do we fix it?

	A	B	C	D
1	<b>ID</b>	<b>Marital Status</b>	<b>Occupation Industry</b>	<b>Which of the following brands are you familiar with (Select all that apply)</b>
2	1000	Married	Media Relations	Avid; Microsoft; Finale
3	1001	Single	Media Relations	Avid
4	1002	Married	Finances	Avid; Finale; Lavasoft
5	1003	Married	Research and Development	Altavista; Yahoo
6	1004	Single	Human Resources	Microsoft; Sibelius; Chami; Google
7	1005	Divorced	Customer Relations	Avid; Sibelius; Altavista; Microsoft
8	1006	Single	Advertising	Lycos; Adobe; Altavista; Google; Sibelius
9	1007	Married	Advertising	Chami; Macromedia; Borland; Lycos





# Data in Tableau

## Solution

	A	B	C	D	E	F	G
1	ID	Marital Status	Occupation Industry	Brand Familiarity: Adobe	Brand Familiarity: Altavista	Brand Familiarity: Avid	Brand Familiarity: Borland
2	1000	Married	Media Relations	0	0	1	0
3	1001	Single	Media Relations	0	0	1	0
4	1002	Married	Finances	0	0	1	0
5	1003	Married	Research and Development	0	1	0	0
6	1004	Single	Human Resources	0	0	0	0
7	1005	Divorced	Customer Relations	0	1	1	0
8	1006	Single	Advertising	1	1	0	0
9	1007	Married	Advertising	0	0	0	0

# Data in Tableau

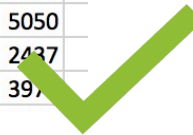
## What's wrong with this spreadsheet? How do we fix it?

[illegible]

# Data in Tableau

## Solution

	A	B	C	D	E	F	G	H
1	Area Name	Total Popula	Under 5 year	5 to 9 years	10 to 14 year	15 to 17 year	18 to 24 year	25 to 34 years
2	Alamance County	151131	9524	9889	10008	6022	15960	17164
3	Alexander County	37198	2209	2337	2388	1519	2670	4390
4	Alleghany County	11155	581	578	658	418	765	1084
5	Anson County	26948	1567	1619	1632	1148	2374	3552
6	Ashe County	27281	1452	1421	1544	884	1771	2963
7	Avery County	17797	773	786	894	606	1739	2206
8	Beaufort County	47759	2781	2995	2946	1805	3393	5050
9	Bertie County	21282	1176	1128	1264	868	1840	2437
10	Bladen County	35190	2131	2165	2351	1470	2771	3971



1. Go to **tableau.unc.edu**
2. Log in with your **ONYEN**
3. Authenticate with **DUO**
4. Select **Staff Training**  
from the menu.