

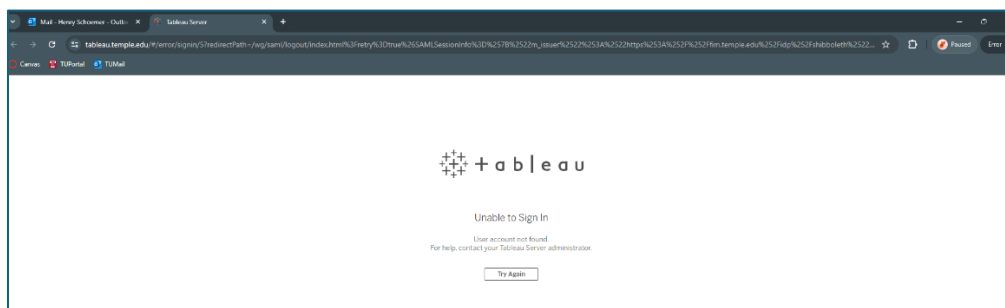
Tools, Tips and Troubleshooting Research Data on Tableau

REV: 9/24/2024

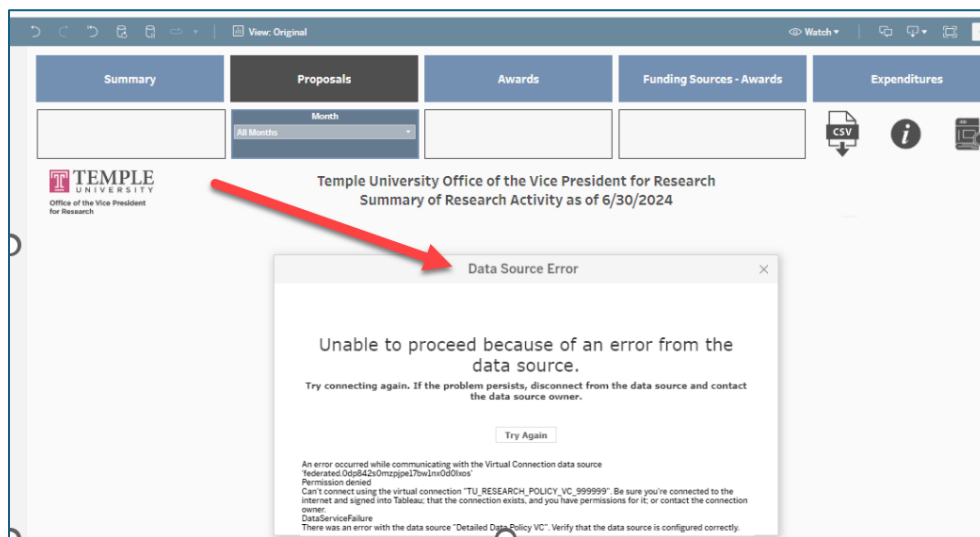
<https://tableau.temple.edu> Is the site to be used for Tableau Reports. That site can also be accessed via the [TUportal](#).

Trouble Shooting Research Tableau:

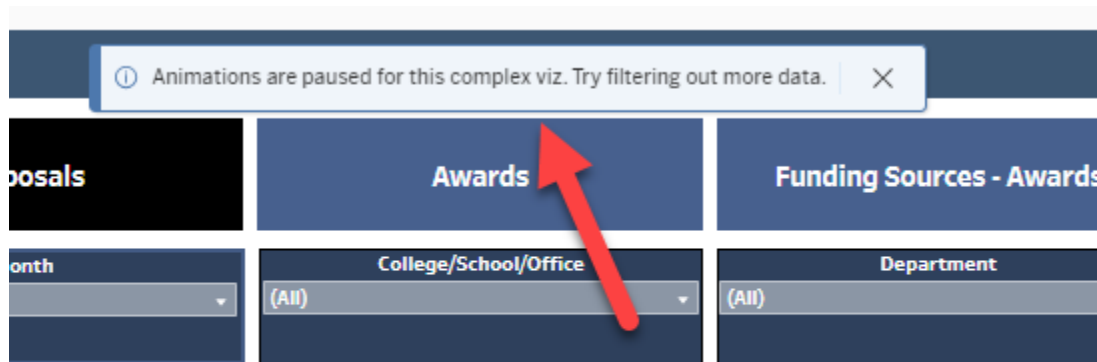
1. If you see the error message below, then you need to contact Tableau Administrator at Temple to have a License provisioned for you at Tableau@temple.edu . Provide the administrator with your name, department and Accessnet login name.



2. If you see this error after moving from the Summary Dashboard to any of the other dashboards, you don't have Permission to view detailed School Data. Only Department Administrators DA1-DA3, Department Heads and Module Administrators in the ERA system have permission to view this data in Tableau.



- If you see this error after opening up Tableau, the system is building the cache for your session, hit refresh or navigate to another dashboard, it should be fine.

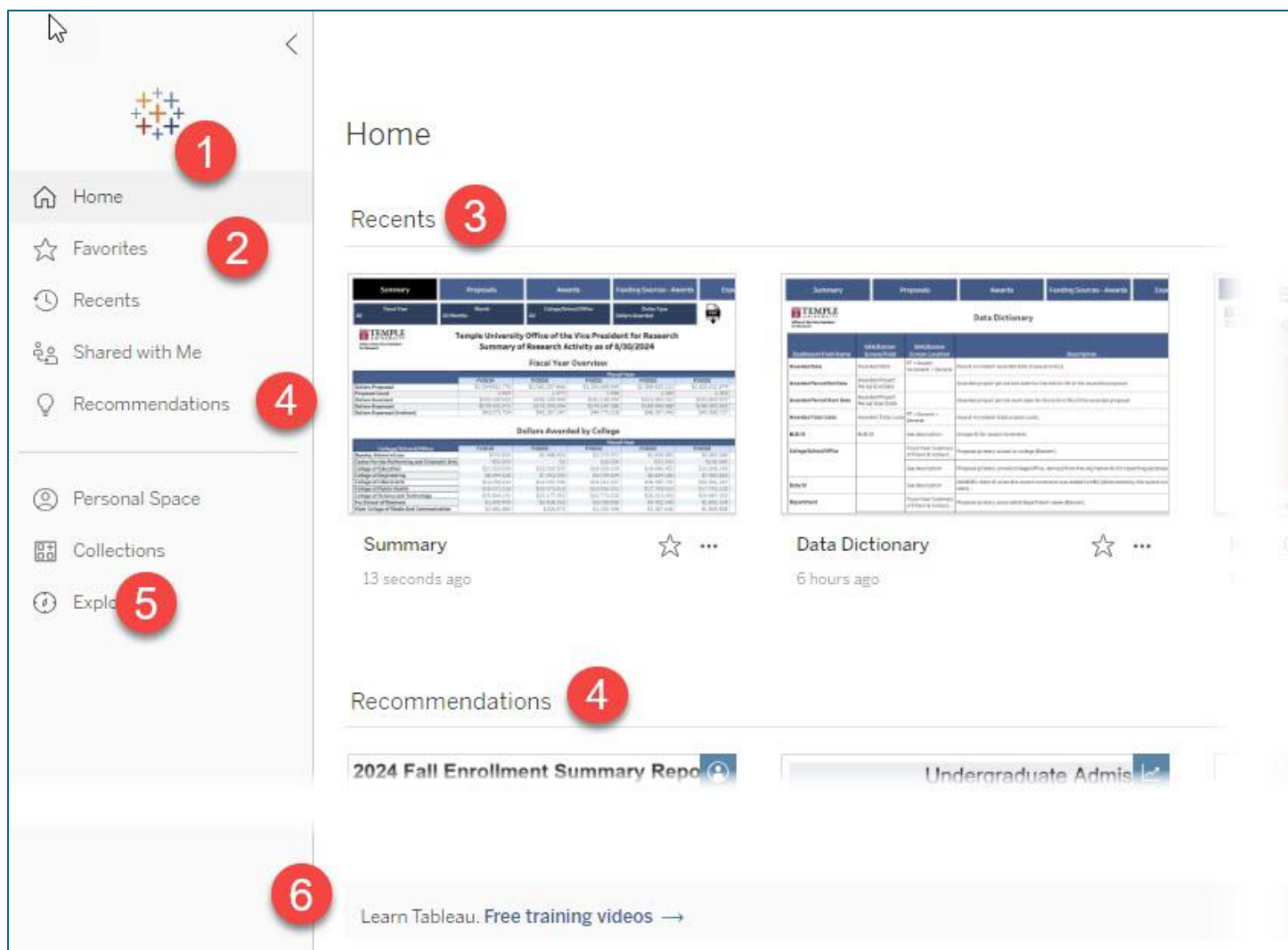


Temple University Office of the Vice President for Research Summary of Research Activity as of 6/30/2024

Tableau Tools and Tips:


Getting Started: Using the Tableau website:

- The Tableau Home after initial login:



1. Both the icon and the **Home** menu items return you to the **Home** screen in Tableau.
2. You can go directly to your list of **Favorites** if you “starred” them already, without using the **Explore** menu item.
3. The **Recent** section of the screen shows the last dashboards accessed by you as well as when, in time, you last visited them.
4. **The Recommendations** section displays the Dashboard Views seen by people with similar viewing habits as yours.
5. The **Explore** menu item functions like **File Explorer** in Windows PCs, allowing you to browse for **Dashboards** within **Folders** on the Tableau web site. **NOTE:** This is a good starting point to find **Dashboards** and mark them as your **Favorites**.
6. **Learn Tableau** contains free training videos for those interested in learning more about using Tableau.
7. Clicking on the top right icon gets you into your Account Profile where you can designate your start page that shows whenever you login to Tableau:





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Summary of Research Activity as of 6/30/2024

Fiscal Year Overview

	Fiscal Year			
	FY2019	FY2020	FY2021	FY2022
Dollars Proposed	\$1,054,51,778	\$1,062,257,866	\$1,205,609,542	\$1,068,321,111
Proposal Count	1,454			1,111
Dollars Awarded	\$192,330,003			\$211,400,000
Dollars Expensed	\$179,001,071			\$194,399,000
Dollars Expensed (Indirect)	\$43,75,704			\$48,399,000

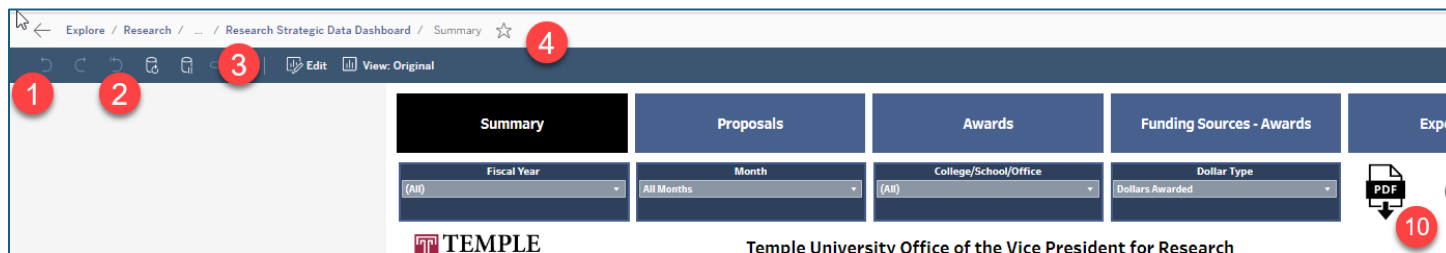
Dollars Awarded by College

Make This My Start Page

You will land on this page after sign in.

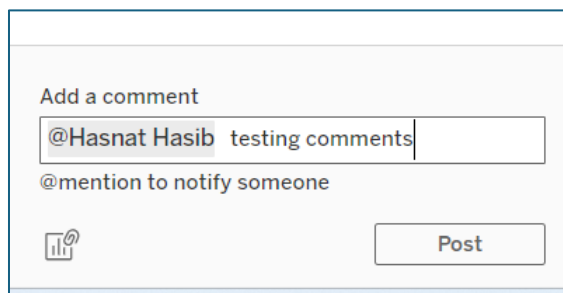
Cancel
OK

b. How to use the menu bar within Tableau:



1. This icon will undo just your last action.
2. This icon will reset your view. Use this to reset the dropdown filters on the screen for Fiscal Year, Proposals, Awards, and Funding sources.

3. The names with forward slashes at the top of screen represent where you are in the folder structure of Tableau along with the Dashboard name. Click on any part of that structure to go to different places on the Tableau server or simply click on Explore in the first position to Explore all of Tableau at Temple that you have access too.
4. This star allows you to click it to save as your favorite dashboard. Similar to a bookmark in a web browser.
5. **Watch** menu item allows you to subscribe to get email snapshots of the view. (We currently don't use the Metrics and Alert options in that menu).
6. Click on this pad with a star to see your favorites menu. (Your Tableau bookmarks).
7. For these two icons, you can place comments and mention someone with the comment for follow up with the *@Name* where you replace name for the progressive search of the person you want as you type their name out. The second icon allows you to choose a download format for the dashboard you clicked into for selection.



The image shows a screenshot of a Tableau comment box. At the top, it says "Add a comment". Below that is a text input field containing "@Hasnat Hasib testing comments". Underneath the input field is a smaller text input field with the placeholder "@mention to notify someone". At the bottom left of the box is a share icon (a document with a plus sign), and at the bottom right is a "Post" button.

8. Clicking on this box icon allows you to use the full screen for viewing and then click again to reduce.
9. Clicking on the **Share** icon gives you two options:
 - a. You can **Share with People** by progressive search of the person(s) you want to share with as you type their name out, then click the name in the results to save it in the selection. Much like outlook email. NOTE: Recipients must have [ERA permissions](#) to view the data.
 - b. Or you can **Share using a Link** by just copy and pasting the link into an email or document, etc. NOTE: Recipients must have [ERA permissions](#) to view the data.