

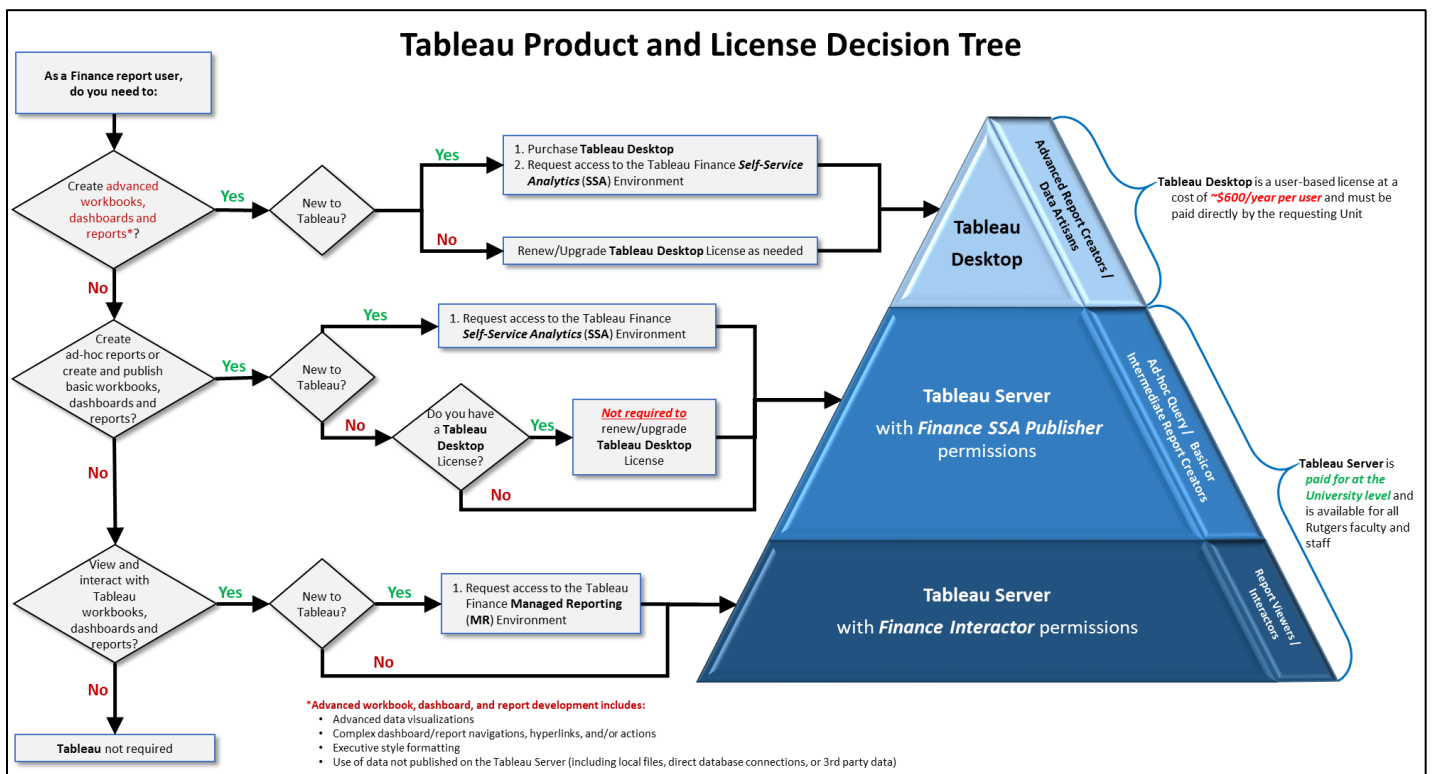
Purpose

This document is intended to provide knowledge and guidance to help make informed decisions about which Tableau product and license is right for each individual throughout the Rutgers Finance reporting community.

This document is targeted for the following audiences:

- ❖ Campus, Unit, or Department Finance leaders who approve **Tableau Desktop** software purchases
- ❖ Experienced Finance Tableau report creators whose **Tableau Desktop** license is up for renewal
- ❖ New Finance Tableau users who will be responsible for creating, publishing, and sharing Tableau workbooks, dashboards, and reports
- ❖ Finance Tableau users who only desire or need to interact with Tableau workbooks, dashboards, and reports already published on the **Tableau Server**

Below is a high-level decision tree that can act as a guide when making a decision on which Tableau Product and License is right for each Tableau user across the Rutgers Finance reporting user community.



If you are new to Finance Tableau reporting, please visit the [UCO Forms Repository](#) to request the appropriate Tableau access that meets your needs.

Background

In recent years, Tableau has rapidly gained popularity and has become the *unofficial* standard tool for data visualization and analytics for many users throughout Rutgers University. The number of **Tableau Desktop** license purchases has grown at a fast pace due to increase awareness of Tableau and its capabilities. The proliferation of these licenses quickly produced a large inventory comprised of multiple versions of **Tableau Desktop** software installations throughout the University. In addition, these **Tableau Desktop** license purchases were made using multiple Rutgers Tableau user accounts making Tableau license management difficult for the Tableau Account Managers. To further complicate matters, the introduction of the University-wide **Tableau Enterprise Server (Tableau Server)** environment in 2016 made it challenging for users to determine which Tableau product they should be using - **Tableau Server** or **Tableau Desktop**. As a result, users have been questioning *if, when, how, and why* they should renew or purchase **Tableau Desktop** licenses.

The following topics provide in-depth comparisons between **Tableau Server** and **Tableau Desktop** that can be used to provide guidance when making a decision regarding which Tableau product and license is right for you and/or your Finance Tableau community:

- [User Type Comparison](#)
- [Product License Cost Comparison](#)
- [Tableau Server vs. Tableau Desktop Feature / Functionality Comparison](#)
- [Finance User Tableau Access and Support Information](#)

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User Type Comparison Details

The suite of Tableau product offerings has changed over time, and will continue to evolve in future software releases. Each new Tableau software release includes new and improved product features and functionality. The current version of **Tableau Desktop** and **Tableau Server** products share most of the same features and functionality for creating workbooks, dashboards, and reports. However, there are some key differences that need to be factored into the decision making process to determine which type of user needs which product.

The user type profiles outlined below can act as a guide to help determine which Tableau product aligns best with each type of user.

User Type	Skill Level	Typical User Profile Description	Tableau Product Recommendation
Report Creator / Data Artisan	Advanced / Experienced	<ul style="list-style-type: none"> ❖ Responsible for creating, publishing, sharing workbooks, dashboards, and reports at the University or Campus/Unit level that require: <ul style="list-style-type: none"> • Advanced data visualizations • Complex dashboard/report navigations, hyperlinks, and/or actions • Executive style formatting • Bring Your Own Data (BYOD) - Use of data not published on the Tableau Server including local files, direct database connections, or 3rd party data) 	<p>Tableau Desktop</p>
Ad-Hoc Query / Report Creator	Basic to Intermediate	<ul style="list-style-type: none"> ❖ Responsible for creating ad-hoc queries for quick analysis for individualized use ❖ Responsible for creating, publishing, and sharing basic workbooks, dashboards, and reports for local audience (department or functional area level) 	<p>Tableau Server with Publisher Permissions</p>
Report Interactor / Information Consumer	Tableau Functional Knowledge	<ul style="list-style-type: none"> ❖ Responsible for exploring data, gaining quick insights into the business, and asking questions to deliver answers that are more meaningful within the users functional area of responsibility 	<p>Tableau Server with Interactor Permissions</p>

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Product License Cost Comparison

Rutgers is currently invested in **Tableau Server** and **Tableau Desktop** licenses. The **Tableau Server** is an enterprise-wide web-based reporting environment that can support an unlimited number of users who can access dashboard and report content published on the server. **Tableau Desktop** is a software that is installed individually on PCs/laptops and must be paid directly by the requesting Unit.

Below is a comparison of the licensing fees for each Tableau Product available for Rutgers faculty and staff.

	Tableau Server	Tableau Desktop
License Fees	<p style="background-color: yellow; text-align: center;"><i>Paid for at the University level</i></p> <p>Tableau Server is available for all Rutgers faculty and staff</p>	<p style="background-color: yellow; text-align: center;"><i>~\$600/year per user</i></p> <p>Tableau Desktop licenses must be paid directly by the requesting Unit</p>

Rutgers is in the process of migrating more users to the **Tableau Server**, which has many benefits including reducing the cost of **Tableau Desktop** licenses fees and user management complexities. Although the majority of the Tableau user community are (or will be) **Tableau Server only** users, there are still a number of users who will continue to require **Tableau Desktop** to be able to create more complex and comprehensive dashboards and reports that may not be created on **Tableau Server** (see section [Tableau Server vs. Tableau Desktop Feature / Functionality Comparison](#) for more details).

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Finance User Tableau Access and Support Information

Tableau Access Request:

If you are a Finance reporting user who wants access to Tableau Finance Data Analytics and Reporting, please visit the [University Controllers Office FINANCIAL REPORTS AND ANALYTICS ACCESS FORMS \(TABLEAU\)](#) to request the Tableau access that meets your needs.

Tableau Support Information:

If you are a Finance reporting user who needs additional Tableau Finance Reporting and Analytics support, please contact your local Campus/Unit Tableau Content Manager ([List of Tableau Content Managers](#)) or the *Finance Data Analytics and Report Team (Finance DART)* at reporting@finance.rutgers.edu.

Tableau Training:

Below is a list of the external and internal Rutgers Tableau courses, videos, resources, and communities that will provide you with the education you need to get to the next level:

External Training:

- The Tableau website hosts many training and education programs from the [Tableau Learning](#) page.
- [Lynda.com](#)* (now a subdivision of LinkedIn) features expert instructors and industry-leading content about business, technology, and creative skills including Tableau training courses.

Internal Rutgers Training:

- [TAB010-Introduction to Running Basic Tableau Reports:](#) This is a 1-hour instructor led course with hands-on computer exercises will provide participants with a basic overview of Tableau.
- [TAB020-Introduction to Tableau Report Development:](#) This is a 3-hour is an instructor-led three-hour course with hands-on computer exercises to educate Tableau users on basic Tableau dashboard and report development.
- ***Rutgers University Tableau Users Group:*** A Rutgers community established to encourage knowledge sharing of the product to help teams meet others at the University who also use Tableau and how they use it.

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*Note Rutgers University provides free access to [Lynda.com](#) for faculty, staff, and students

Tableau Desktop Features *Not* Available With Tableau Server

Below is a list of **Tableau Desktop** features and functionality that are not available in the current version of **Tableau Server** here at Rutgers.

1. **Dashboard Actions** can only be created in Tableau Desktop
 - **Dashboard Actions** enable the report creator to include *Filters, Highlighting, Go to URL, Go to Sheet, Change Parameter, and Change Set Values* functionality in a dashboard
2. Tableau Desktop provides the following analytic capabilities not found in Tableau Server
 - Forecast and Cluster features
 - Trend Line editing
3. More robust Tooltip editing and formatting including the ability to create Tableau “**Viz in a tooltip**” which allows the report creator to add a view within the Tooltip
4. Ability to double click on a worksheet title to edit it
5. Ability to specify formatting at the dashboard level or worksheet level
6. More robust data source editing

New features and enhancements related to *Web Authoring* and *Interacting with Views on the Web* are listed in [What's New in Tableau for Users](#) and [Web Authoring and Tableau Desktop Feature Comparison](#).

For topics related to *Web Authoring* and *Interacting with Views*, see [Using Tableau on the Web](#).

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