

## What's the Buzz All About?

As Tableau rapidly gains popularity across Rutgers University, many people are still left wondering what the “*Tableau buzz*” is all about.

This document will answer all of those burning Tableau questions that you have, but are afraid to ask.

### *Questions such as:*

- [What is it?](#)
- [Is Tableau a company or a product?](#)
- [What Tableau products are being used here at Rutgers University?](#)
- [How much does Tableau cost?](#)
- [Tableau Server vs. Tableau Desktop – which one is right for me?](#)
- [How can I learn how to use Tableau?](#)
- [How do I get access to Tableau?](#)
- [Who do I contact if I need additional Tableau support?](#)

## What is it?



Are you one of the many people who have *never* heard of Tableau? Or, have you heard of Tableau but are not quite sure what it is? If so, then you have come to the right place. This document will give you a brief overview on what this “*Tableau thing*” is all about.

In a nutshell – Tableau is an industry-leading data visualization and analytic tool that helps users see and understand their data more efficiently and effectively. Tableau can be used to easily visualize and explore data, gain quick insights into the business, and ask deeper questions to deliver answers that are more meaningful.

### Useful Links:

[Tableau Homepage](#)

[Tableau Software Wikipedia](#)

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## Is Tableau a company or a product?



It is both. Tableau is the name of the company and the name of the software product suite offered by the company. Below is the list of products that make up the Tableau suite of products:

- [Tableau Server](#) (a.k.a. *Tableau Enterprise* or *Tableau Enterprise Server*): Enterprise-wide reporting and analytic tool that is installed on an on-premise (or cloud-based) server that can be accessed via the web by users across the organization. **Tableau Server** allows users to interact with dashboards and reports to analyze various aspects of your business. **Tableau Server** also enables users to create, publish, and share Tableau dashboards and reports by connecting to, or extracting data from, a large variety of data sources.
- [Tableau Desktop](#): User-based software that is installed on a users' laptop/desktop computer. **Tableau Desktop** enables users to create, publish, and share Tableau dashboards and reports by connecting to, or extracting data from, a large variety of data sources. Dashboards and Reports can be saved locally and shared with other **Tableau Desktop** users, and can also be published and shared on a **Tableau Server** for all Tableau Server users.
- [Tableau Online](#): Subscription based software (*Software-as-a-Service*) that hosted in the cloud. **Tableau Online** enables users to create, publish, and share Tableau dashboards and reports in the cloud by connecting to, or extracting data from, a large variety of data sources.
- [Tableau Prep](#): Software installed on a users' laptop/desktop that enables users to combine, shape, clean and operationalize their data and data flows that can be used in creating, publishing, and sharing Tableau dashboards and reports.

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## What Tableau products are being used here at Rutgers University?



Rutgers is currently invested in **Tableau Server** and **Tableau Desktop** products.

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 the license is currently paid by individual campus/units.

Rutgers is in the process of migrating more users to the **Tableau Server** and away from **Tableau Desktop** licenses to help reduce licensing fees and minimize user license 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 can't be created on **Tableau Server** (please see [Tableau Server vs. Tableau Desktop – which one is right for me?](#) to help determine which Tableau tool is right for you).

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## How much does Tableau cost?



Tableau licensing fees vary based on the various products available within their product suite and based on your type of organization (i.e. Higher Ed pricing vs. Industry pricing differences). Below is a comparison of the licensing fees for each Tableau Product available for Rutgers faculty and staff.

	Tableau Server	Tableau Desktop
<b>License Fees</b>	<p><b>Free</b></p> <p>The Tableau Server license is paid for at the University level.</p>	<p><b>~\$600/year per user</b></p> <p>Tableau Desktop licenses are purchased by your Campus/Unit</p>

You can visit the [Tableau Product Pricing](#) site for more information on other Tableau products.















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## Tableau Server vs. Tableau Desktop – which one is right for me?



The suite of Tableau product offerings has rapidly 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. As a result, it has become increasingly difficult to decide which product is best suited to meet your analytic needs.

Here are some guidelines that will help you determine which product works best for you with the most recent version of Tableau available at Rutgers:

Feature / Functionality	Tableau Server	Tableau Desktop
<b>Creating, editing, publishing, and sharing Workbooks, Dashboards, and Reports</b>	Limited  (~80% features and functionality)	
<b>Connectivity to data:</b>		
<ul style="list-style-type: none"> <li>• Tableau Server Data Sources               <ul style="list-style-type: none"> <li>◦ <i>Automatically refreshed nightly from the Data Warehouse</i></li> </ul> </li> </ul>		
<ul style="list-style-type: none"> <li>• Bring Your Own Data (BYOD)*               <ul style="list-style-type: none"> <li>◦ <i>Local data specific to a Department or Unit</i></li> <li>◦ <i>Budget spreadsheet, Excel, csv's, MS Access database, other Department/Unit specific data sources, etc.</i></li> </ul> </li> </ul>		
<b>Tableau Workbook distribution:</b>		
<ul style="list-style-type: none"> <li>• Publish and share on the Tableau Server</li> </ul>		
<ul style="list-style-type: none"> <li>• Publish and share outside the Tableau Server</li> </ul>		
<b>Interacting, viewing, and exploring data through existing published Workbooks</b>		
<ul style="list-style-type: none"> <li>• Workbooks published on the Tableau Server</li> </ul>		
<ul style="list-style-type: none"> <li>• Workbooks published locally (local computer or share drive)</li> </ul>		

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Please refer to the **Tableau Product and License Decision Guide** document for more details.

\* More recent versions of **Tableau Server** (v.2018x and above) do allow for all possible BYOD data connections.

## How can I learn how to use Tableau?

Do you  
want  
to learn  
more?



Whether you are a Tableau “*newbie*” or an experienced Tableau developer, there are a variety of external and Rutgers internal Tableau courses, videos, resources, and communities that will provide you with the education you need to get to the next level.

Here is a list Tableau resources that you can to use to guide you on your Tableau journey:

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### External Tableau Training and Education:

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#### [Tableau Learning](#)

The Tableau website hosts many training and education programs from the [Tableau Learning](#) page including:

- **Free Tableau Training:** The [Tableau Free Training Videos](#) site offers many free video tutorials for all levels of Tableau users (Tableau report viewers, explorers, creators, and administrators).
- **Free Tableau Resources:** The [Tableau Community](#) page has a variety of free resources including [Tableau Forums & User Groups](#), [Tableau Public](#), and [Tableau Support](#) for [Tableau Desktop](#), [Tableau Prep Builder](#), [Tableau Server](#), [Tableau Online](#), [Tableau Help](#), and [Tableau Knowledgebase](#) resources.
- **Fee-based Tableau Training:** Tableau offers fee-based training courses via the Tableau website including [Tableau eLearning](#) courses, [Tableau Classroom Training](#) (*In-Person, Live-Virtual, and/or On-Site*), and [Tableau Live Training](#) (including Recorded Live Sessions). Prices vary based on the curriculum offered by Tableau.

#### [Lynda.com](#)

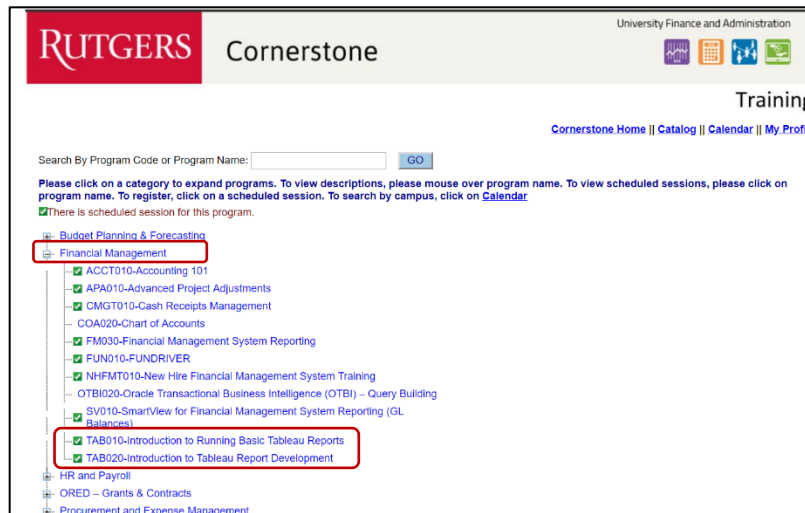
Lynda.com, now a subdivision of LinkedIn, features expert instructors and industry-leading content about business, technology, and creative skills. With thousands of video tutorials and training resources, Lynda.com offers courses in leadership, project management, graphic design, photography, software development, and more. **Tableau training courses can be found on this site.**

**\*\*\* Rutgers University provides free access to Lynda.com for faculty, staff, and students \*\*\***

## Rutgers Internal Tableau Training and Education:

### Cornerstone Course Registration

The *Finance Data Analytics and Reporting Team (Finance DART)* currently offers the following two training courses for Finance report users across all campuses and units via the [Cornerstone Course Registration](#) site:



- **TAB010-Introduction to Running Basic Tableau Reports:**

This 1-hour instructor led course with hands-on computer exercises will provide participants with a basic overview of Tableau and the steps necessary to run a report and download the report results. A short tutorial on how to run the FMS Payroll Distribution report and an explanation of other payroll reports available in Tableau will be given for those participants that have access to payroll information.

We strongly recommend that new Tableau users take the **TAB010** class defined above prior to taking the **TAB020** class defined below.

- **TAB020-Introduction to Tableau Report Development:**

This is an instructor-led three-hour course with hands-on computer exercises for Tableau users. Participants must have approval and access to Tableau prior to registering for the course and should have experience navigating Tableau and running reports. Users should have experience using Oracle Financial Cloud. The course will be taught using **Tableau Server**, so a **Tableau Desktop** license is not required.

Finance DART will continue to offer additional Tableau training courses based on future demand. Please visit the [Finance Cornerstone Training](#) website under the [Financial Management](#) section to see the most recent Tableau training courses available.



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### **Rutgers University Tableau Users Group:**

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The *Rutgers University Tableau Users Group* was 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. We share best practices in using the tool as well as practical discussions about using University data and how we can improve upon our data analytics at the University.

Simply [click here to request access](#) to this group or send an email to [Tableau Users Group](#) if you need more information.

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## How do I get access to Tableau?



Now that you are an expert on what this “*Tableau thing*” is all about, you may be interested in getting access to this new powerful reporting and analytic platform.

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.

For all others, please contact the *Data Management & Analytics* team at [dba@oit.rutgers.edu](mailto:dba@oit.rutgers.edu) for more information.

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### Who do I contact if I need additional Tableau support?



If you are a Finance reporting user who needs additional Tableau Finance Reporting and Analytics support, please contact the *Finance Data Analytics and Report Team (Finance DART)* at [reporting@finance.rutgers.edu](mailto:reporting@finance.rutgers.edu).

For all other non-Finance related Tableau support, please contact the *Data Management & Analytics* team at [dba@oit.rutgers.edu](mailto:dba@oit.rutgers.edu).

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