Who is this guide aimed at?	Users of Tableau Server, including Senior Leaders, HR Managers, and Athena SWAN Coordinators.
How to use this guide	This guide will explain how to access and navigate around Tableau Server. It will also describe how to interact with the data displayed in the dashboards.

1. Gaining Access

All the Tableau reports require you to have **(a) an Oxford Single Sign-On (SSO) and (b) to be registered for access to Tableau Server**. If you attempt to access a report for which you do not have appropriate permissions, you will receive an error message. If you have forgotten or have an expired Oxford password, you can reset this here: https://webauth.ox.ac.uk/.

All users of PeopleXD / HR Reporting (Recruitment and/or People Management) will automatically be given access to Tableau Server to view HR KPI reports. If you are not a People XD / HR Reporting user, but would benefit from access to these reports, please refer to the https://hrsystems.admin.ox.ac.uk/request-access-to-tableau webpage.

Once access has been granted, you can log in to Tableau Server.

> ### Data Protection and Your Responsibilities
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> It is your responsibility to ensure that any reports or data downloaded is held in accordance with the General Data Protection Regulation (GDPR; 2018) by following with the University's guidance on Data Protection and complying with the University's Information Security Policy.

2. Exploring the Server

It is possible to view the workbooks on Tableau Server in more than one way. When a workbook is published, you may be sent a link which will take you to that workbook directly. You will still be required to log in, but the workbook with all its views will then immediately open. Alternatively, you can navigate to workbooks from the Tableau Server **Home** page (see below).
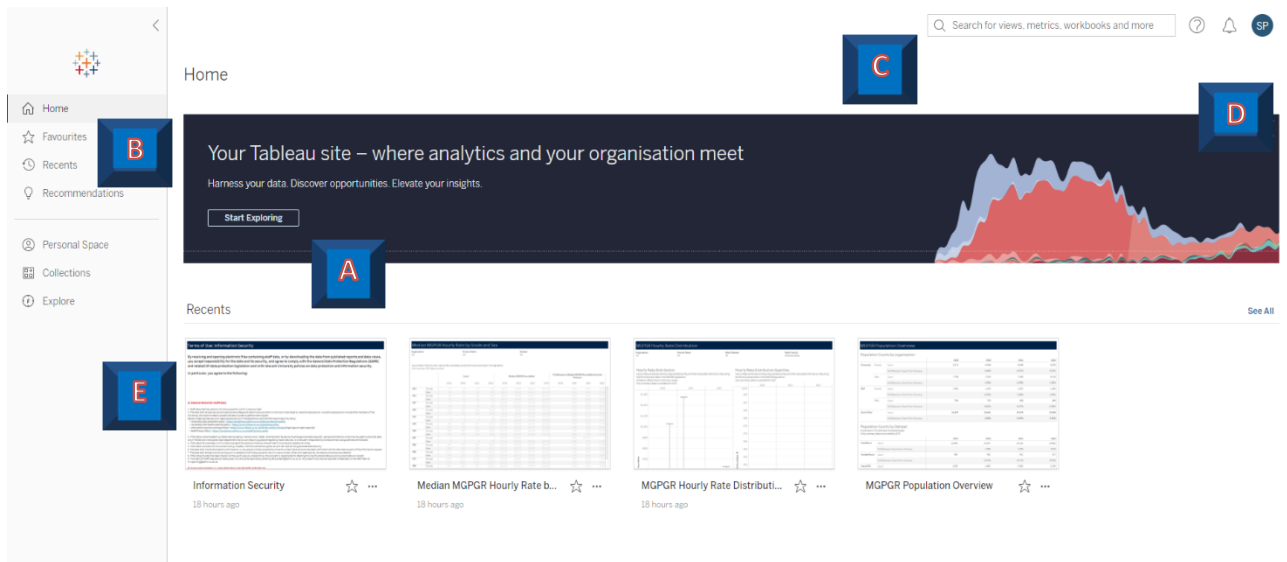
A: The **Start Exploring** navigation button will take you to the available projects, workbooks and views.

B: There is a menu on the left hand-side of the screen, to allow you to navigate to the **Home** page; to **Favourites**; **Recent** projects, workbooks and views; and **Recommended Views** based on those trending in the organisation in the past week.

If there are some views or workbooks that you use regularly, you can add these to your **Favourites** by clicking on the star next to the name of the view or workbook. These will then be accessible via the **Favourites** menu on the left-hand side of the homepage.

C: There is a **Search** bar to assist in finding content on the server.

D: There is navigation to the **Help** menu, **Notifications** and **Your Account**.

E: Recent projects, workbooks and views that have been opened will be visible here.

3. Understanding the Structure on the Server

The server is divided into **projects** which cover broad categories of information, for example HR data is in the project HR Data Mart - Restricted. Projects contain **workbooks**, for instance 'HRI-1997 Staff Turnover', which themselves contain individual **views** – the interactive tables/charts/dashboards that show the information, for instance 'Annual Turnover by Division and Role' is one of the views available in this workbook. This structure is visible in the breadcrumb trail that shows your location on the server.
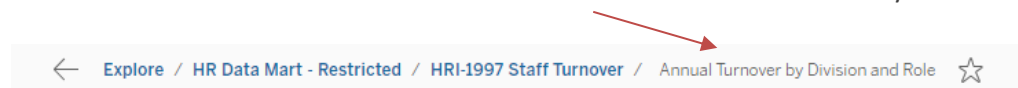
4. Interacting with the Views

Once you have navigated to the view you are interested in, you will see all the views within the workbook as tabs along the top which you can click through. Each workbook has an Information Security view, also, often a Data Definitions or Welcome view, which provide information about the underlying dataset and the groupings used within the workbook.

There are common ways of interacting with the data that is displayed, described below.

- **Tooltips:** Many views have a tooltip that displays additional information when you hover your mouse over a mark.

- **Filtering:** Most views contain filters that allow you to select just the data in which you are interested; for example, you may only wish to see data for a particular year, division etc. If the display is empty, it is likely that your filter choices return no information. You can also select several marks while holding down the control key so that the tooltip option appears to 'keep only' or 'exclude' the selected marks further filtering your view.

- **Sorting:** You can amend the way in which the data is displayed in the view by hovering over the top of the column or row you wish to sort by and clicking the sort icon.


- **Resetting the view**: If your filter choices have become confusing, or you wish to return to the original view of the data, you can use the **Revert** button located on the tool bar at the top of your view.

5. Downloading Data or Views

- **Downloading Data:** As well as viewing the data (described above under **Tooltips**) you can also export or download the data visible on the dashboard into Excel directly using the **Data,** or **Crosstab** option which summarises the data like a pivot table. To download the data, click into the data table or visualisation to select it, then click the download button, and select **Data**. Not all views will have these features available due to the confidential or sensitive nature of the data.

- **Downloading Views as an Image or PDF:** Clicking on the **Image** option will export any view as a .png image which can then be imported into other applications such as Word. Alternatively, you can download the view as a PDF file using the **PDF** option. Select either **Portrait** or **Landscape** orientation and a **page size**. You can choose whether to download the **current view, specific sheets from the dashboard or specific sheets from the workbook.**

- **Downloading Views into PowerPoint:** Clicking on the **PowerPoint** option will export any view as a .pptx file. You can choose whether to download the **current view, specific sheets from the dashboard or specific sheets from the workbook**.
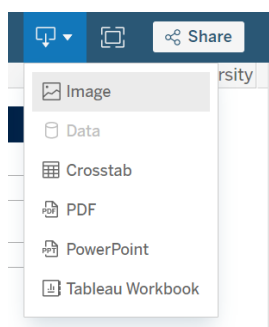
6. Need more help?

If you have any difficulties accessing HR data on Tableau Server or if you have any questions, comments or requests for changes and enhancements, please contact hr.reporting@admin.ox.ac.uk.