

# Tableau User Guide for the CanWaCH Analytics Portal



## *What is Tableau? How can it help you get started with data visualization?*

The **CanWaCH Analytics Portal** is powered by Tableau.

Tableau is a data visualization software. The purpose of this user guide is to provide an overview of Tableau's free software and how it can be used to support your work in global health.

CanWaCH's Tableau files are open source and available to download with no limitations. Every chart, graph and image can be printed and exported independently. Additionally, all the code and custom calculations<sup>1</sup> are included to help users replicate the same chart types using any data set.

## How to get started

Tableau offers two free options: **Tableau Reader** and **Tableau Public for Desktop**. Both options are **free to access** and include one slide with all visuals which are identical to those displayed in the **CanWaCH Analytics Portal** as well as each unique visual on its own independent slide.

For new users, **Tableau Reader** enables you to share a single high-resolution visual from the CanWaCH Analytics Portal that is customizable for any format.

For advanced users, **Tableau Public for Desktop** is available to help you dig into the unique steps and calculations used to create every visual in the CanWaCH Analytics Portal.

## What is the difference?

### OPTION ONE: Tableau Reader

For new users, **Tableau Reader** enables you to share a single high-resolution visual from the CanWaCH Analytics Portal that is customizable for any format.

Tableau Reader is the only free option that allows the user to Print and Export the visuals in high-resolution and a variety of formats. Tableau Reader also allows you to "Print to PDF" for a single image. (see *Visual 1* below)

However, there are limits to Tableau Reader's functionality. It does not allow you to build visuals, display calculations or allow you to learn Tableau. It is meant as a presentation tool and to help users print high-resolution images.

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<sup>1</sup> Disclaimer: The CanWaCH Analytics Portal is a bespoke build with multiple custom calculations. CanWaCH is not responsible for incorrect reproductions of the visuals.

## OPTION TWO: Tableau Public for Desktop

For advanced users, **Tableau Public for Desktop** is available to help you dig into the unique steps and calculations used to create every visual in the CanWaCH Analytics Portal.

**Tableau Public for Desktop** is the only free option that allows the user to explore and learn Tableau. The software is closest to the paid version. It enables the user to view and edit custom calculations, data joins and features in the Tableau workbook. However, there are limits to Tableau Public for Desktop's functionality. It does not allow the user to Print or Export the visuals in any format.

## A step-by-step guide for accessing visuals from the CanWaCH Analytics Portal in Tableau

### OPTION ONE: Tableau Reader

**STEP ONE: Download a free version of the desktop software Tableau Reader.**

Click the "download now" orange button.

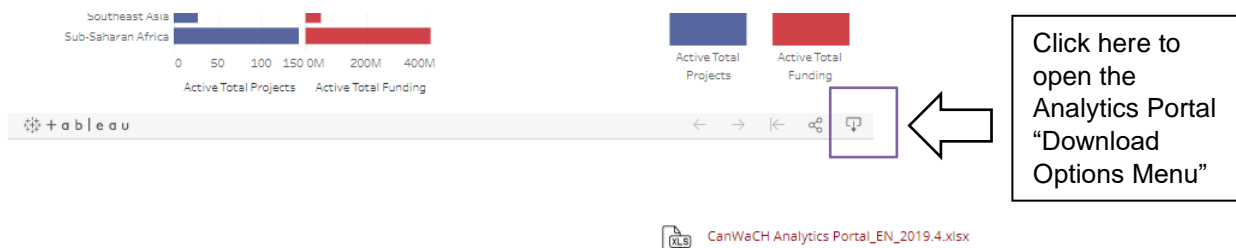
#### Visual 1



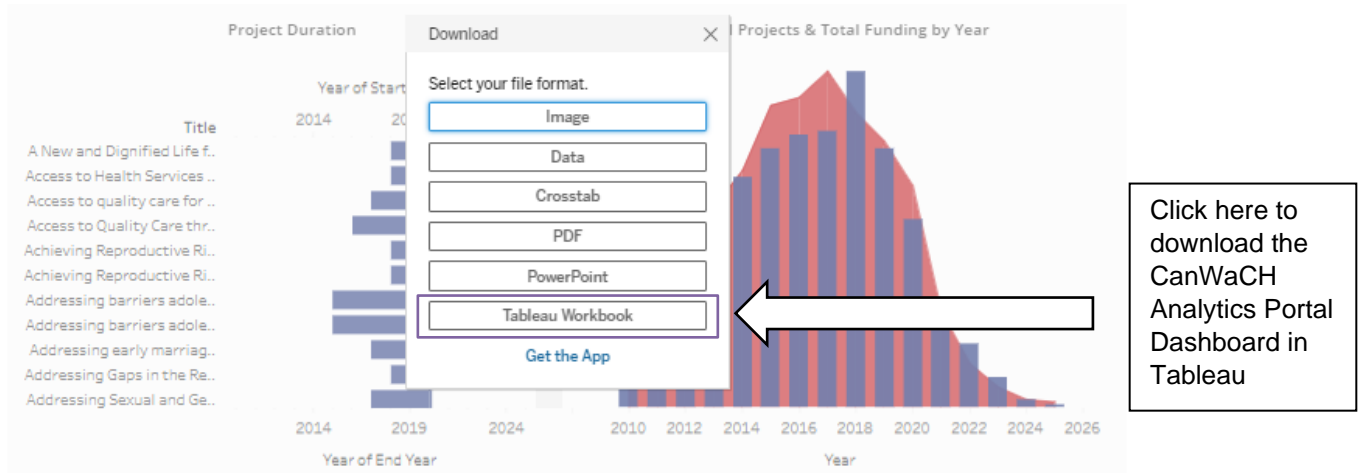
**STEP TWO: Download the CanWaCH Tableau Workbook**

Once Tableau Reader is installed, download the CanWaCH Tableau Workbook. This is found in the **CanWaCH Analytics Portal** and visible at the bottom of the page. See *Visual 2* and *Visual 3* for further instructions.

#### Visual 2



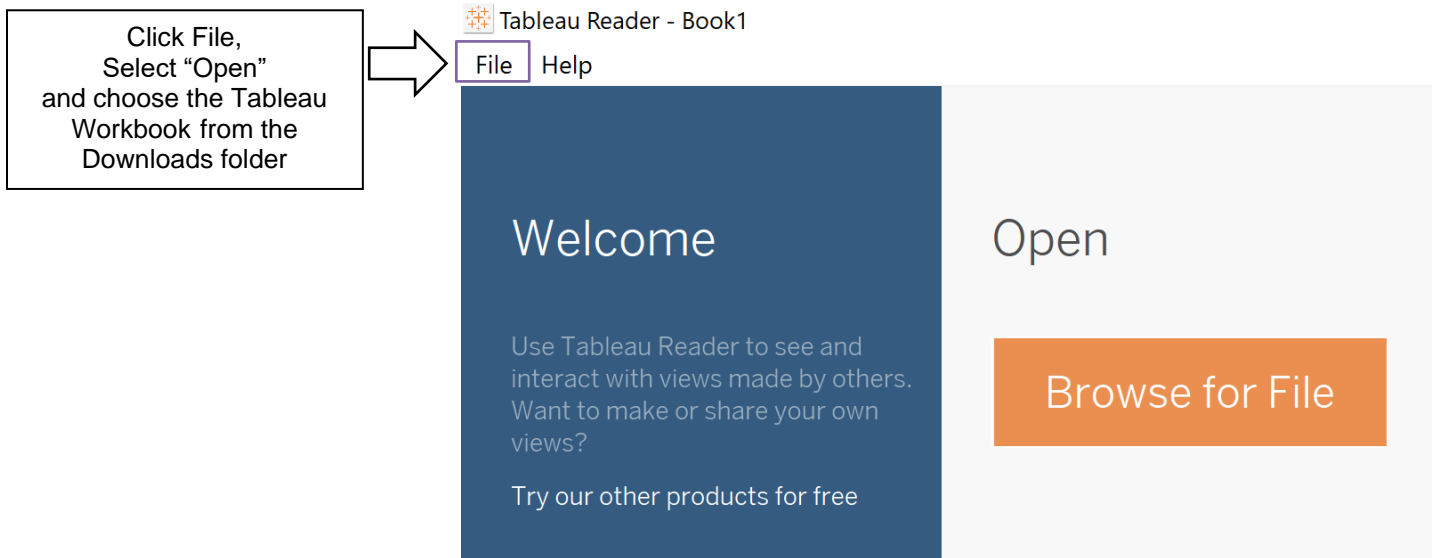
### Visual 3



### STEP THREE: How to open the CanWaCH Analytics Portal Dashboard in Tableau

Once the file is downloaded, the file should automatically open in Tableau Reader 2020.1. If the file does not automatically open, locate "Tableau Reader 2020.1" in the start menu on a PC or the finder menu on a Mac and open the program.

### Visual 4



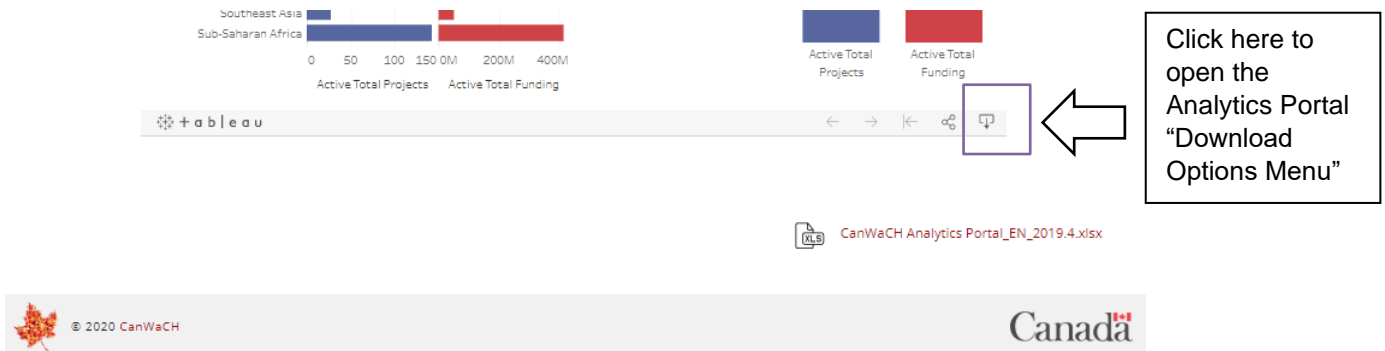
## OPTION TWO: Tableau Public for Desktop

### STEP ONE: Download a free version of Tableau Public for Desktop

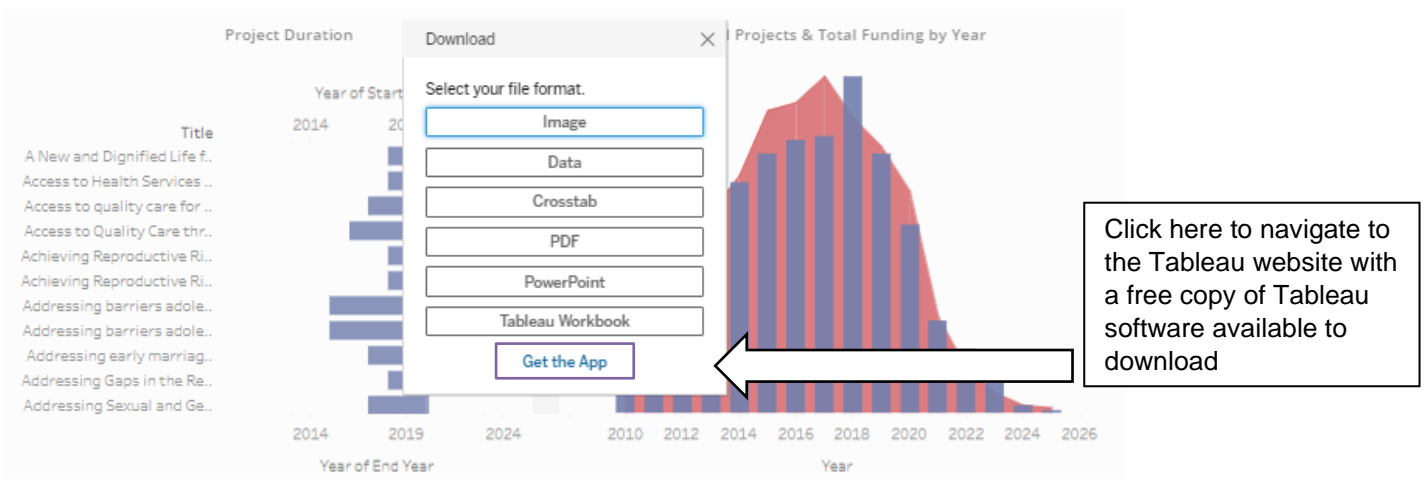
Downloading a free version of Tableau Public for Desktop can be directly done by accessing the **CanWaCH Analytics Portal** and selecting “download options menu” (see *Visual 6* below).

Once you have clicked on the download button, you will be prompted to select a file format (see *Visual 8* below). Select “Get the App”. This will navigate you to Tableau Public for Desktop webpage, where you will be prompted to enter your e-mail address and select “Download the App” (see *Visual 9* below). A free copy of Tableau software will be available to download.

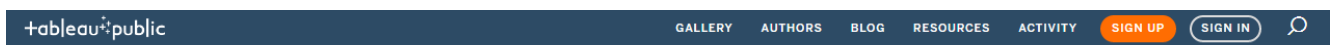
Visual 6



Visual 7



Visual 8



### You'll be exploring in minutes

Create interactive graphs, stunning maps, and live dashboards in minutes. Save your viz to your Tableau Public profile, and share it anywhere on the web. Anyone can do it, it's that easy—and it's free.

Enter your email address

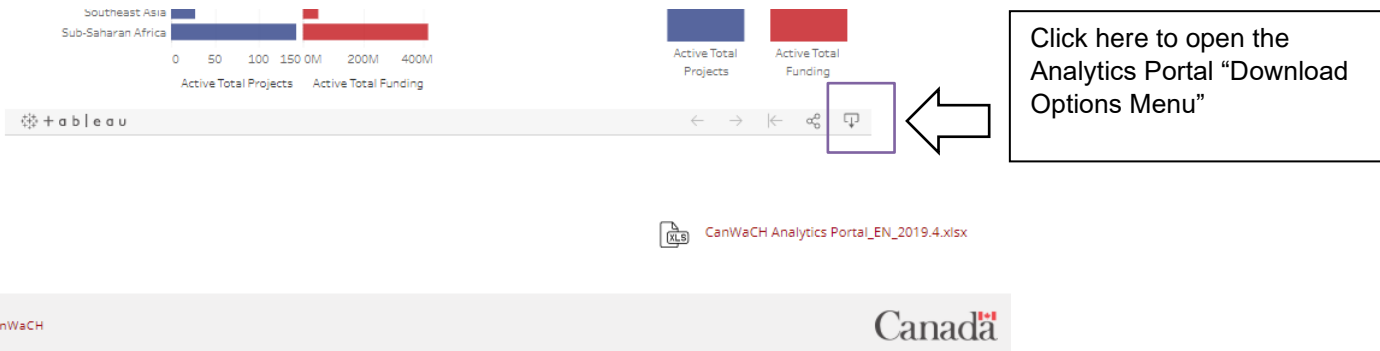
2020.1 Available for Windows and Mac | System Requirements

Enter your e-mail address & download the APP to install the free version of Tableau Public Desktop

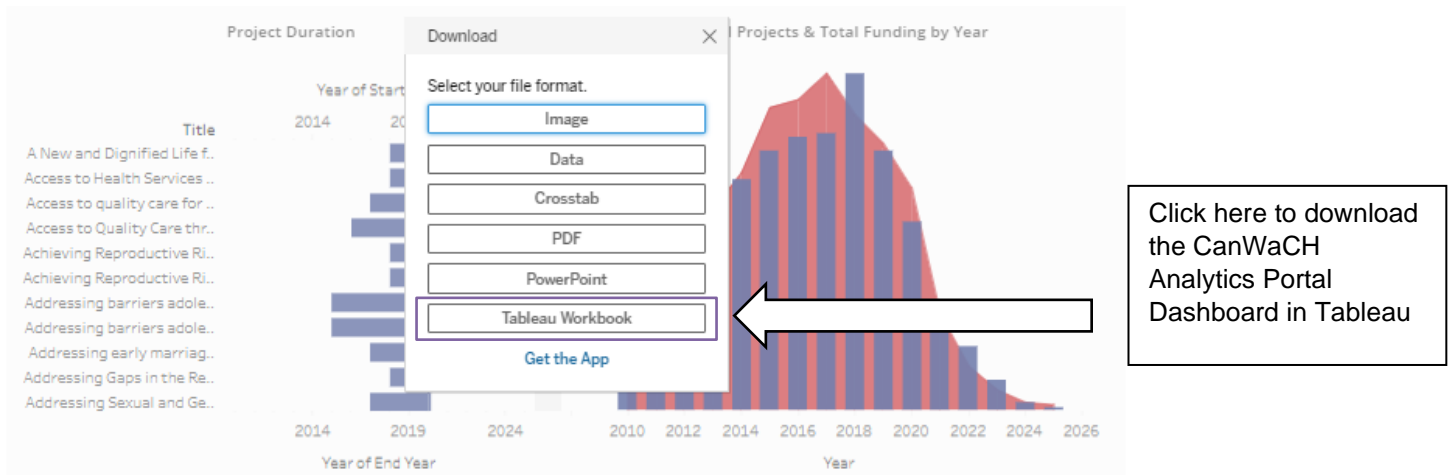
## STEP TWO: Download the CanWaCH Tableau Workbook

Once Tableau Public for Desktop is installed, download the CanWaCH Tableau Workbook. This is found in the **CanWaCH Analytics Portal** and visible at the bottom of the page.

### Visual 9



### Visual 10

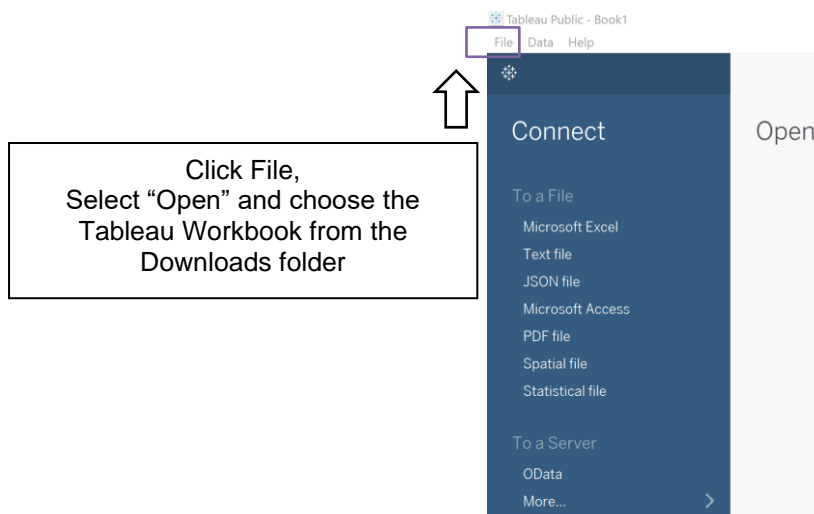


## STEP THREE: How to open the CanWaCH Analytics Portal Dashboard in Tableau Public Desktop

Once the file is downloaded, the file should automatically open in Tableau Public Desktop.

If the file does not automatically open, locate "Tableau Public 2020.1" in your start menu on a PC or the finder menu on a Mac and open the program.

### Visual 11

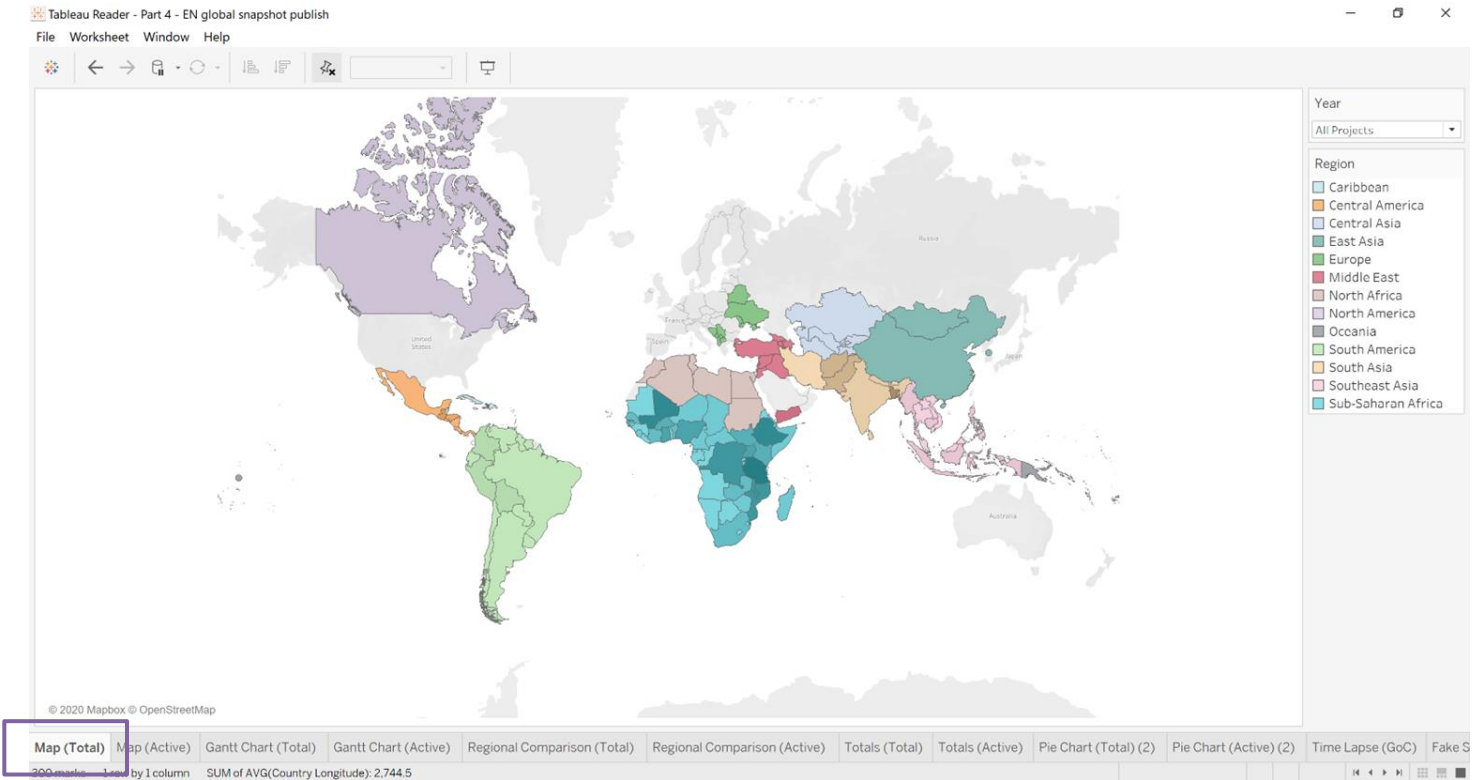


# BONUS: How to use “Print to PDF” in Tableau Reader

## STEP ONE: How to access and print a single unique visual

In Tableau reader, navigate to the sheet (tab) with the visual you want to print (see visual #5). On your select tab with your visual, navigate to the File, and select “Print to PDF” (see visual #6).

### Visual 12



Click on the Visual you want to Print

### Visual 13

Navigate to File,  
select “Print to PDF”

