Easing Headaches from Repetitive Reporting: Automating Reports with Tableau

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About Texas State

- Fall enrollment of 38,808 students
  - 41% increase over past 10 years
- All 50 states + DC
  - Predominantly Texas and California
- Hispanic Serving Institution
  - Increased 137% in past 10 years
About our Office

10 Years Ago

• Campus of 27,486

• Staff of 6

• Focus on Academic Affairs

Today

• Campus of 38,808
  • Plus system office requests

• Staff of 8

• Focus on Academic Affairs
  • Plus Finance, Equity & Access, Athletics, etc.

Changes in Reporting

• The audience changed

• The number of reports increased

• The nature of the reports changed

• The “urgency” changed
Our Goal

• Rapid development and updates
• Flexible
• Easy to use
• Easy to understand
• Platform independent
• Quick to Access

Obstacles & Challenges - Staffing
Obstacles & Challenges – Multiple Systems

Things we wanted

☐ Ability to **reuse existing code**

☐ Ability to **schedule data refreshes**

☐ Ability to **easily modify reports**

☐ Ability to **quickly explore data**
Things we wanted

- Ability to reuse existing code
- Ability to schedule data refreshes
- Ability to easily modify reports
- Ability to quickly explore data

Our Solution

Some Tableau Pros and Cons

<table>
<thead>
<tr>
<th>Pros</th>
<th>Cons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allows multiple data sources</td>
<td>Cost</td>
</tr>
<tr>
<td>Short learning curve</td>
<td>Unfamiliar report format</td>
</tr>
<tr>
<td>Strong support community</td>
<td>Perception of “Magic Bullet”</td>
</tr>
<tr>
<td>Easy Refresh Process</td>
<td></td>
</tr>
</tbody>
</table>
The Development Process (in General)

**The Past**
- Write SQL (SQL Developer)
- Export Data
- Manipulate Data (SPSS)
- Publish to Access
- Connect to Excel
- Format Excel
- Publish
- Repeat

**Today**
- Write SQL (in Tableau)
- Import Data
- Format
- Schedule Refresh

Some Examples
- Registration and Retention
- Employee Diversity
- Others
Realized and Future Advantages

• Reusable Code
• Faster report updates
• Flexible Report Functionality
• Shared/Common Data Sources

Continuing Obstacles

• Report Proliferation
• The “Kitchen Sink” Dilemma
• Data Structure and Accuracy
Things to Take Away

- Streamline the process
- Leverage technology
- Realize changes in report usage

Questions
REMINDER

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