

AR | FORUM 2017

Easing Headaches from Repetitive Reporting:
Automating Reports with Tableau

G. Marc Turner

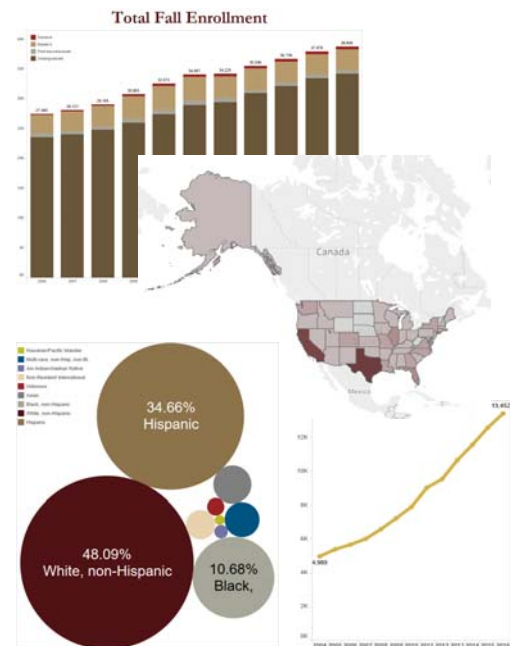
TEXAS STATE
UNIVERSITY*The rising STAR of Texas*

MEMBER THE TEXAS STATE UNIVERSITY SYSTEM

AR FORUM 2017

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

TEXAS STATE
UNIVERSITY
The rising STAR of Texas

AF FORUM 2017

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.

TEXAS
STATE
UNIVERSITY
The rising STAR of Texas

AF FORUM 2017

Changes in Reporting

- The audience changed
- The number of reports increased
- The nature of the reports changed
- The “urgency” changed



TEXAS
STATE
UNIVERSITY
The rising STAR of Texas

AFR FORUM 2017

Our Goal

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



TEXAS
STATE
UNIVERSITY
The rising STAR of Texas

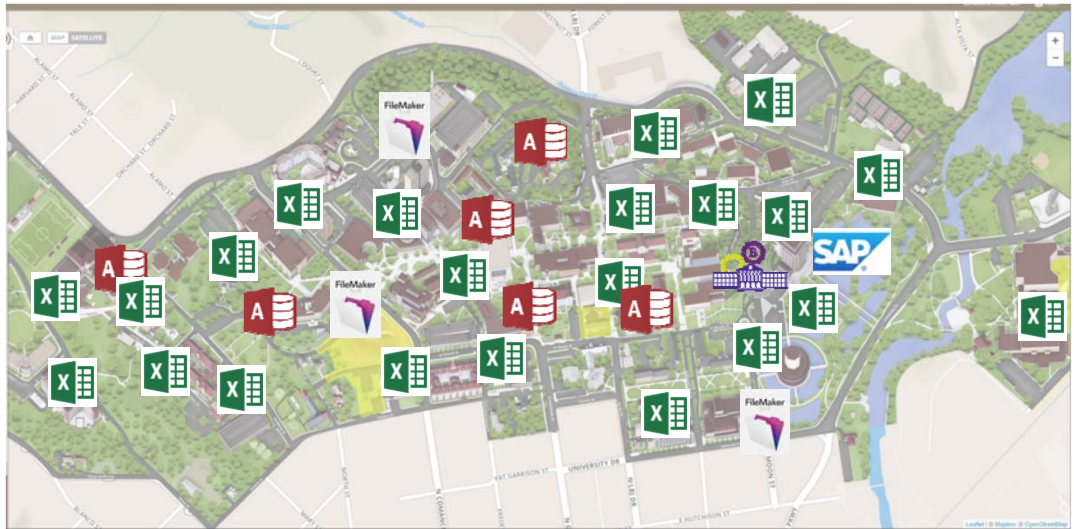
AFR FORUM 2017

Obstacles & Challenges - Staffing



TEXAS
STATE
UNIVERSITY
The rising STAR of Texas

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**

AFR FORUM 2017

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







TEXAS
STATE
UNIVERSITY
The rising STAR of Texas




AFR FORUM 2017

Some Tableau Pros and Cons

Pros

-  Allows multiple data sources
-  Short learning curve
-  Strong support community
-  Easy Refresh Process

Cons

-  Cost
-  Unfamiliar report format
-  Perception of "Magic Bullet"

TEXAS
STATE
UNIVERSITY
The rising STAR of Texas

AR FORUM 2017

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

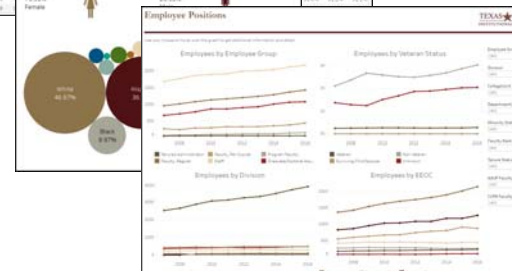
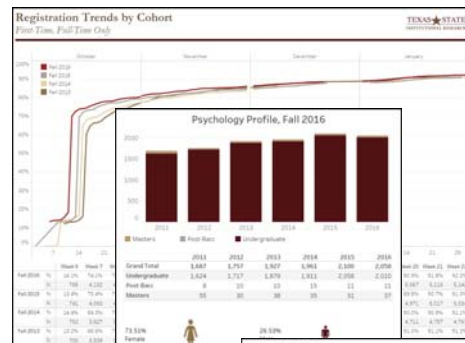
- Write SQL (in Tableau)
- Import Data
- Format
- Schedule Refresh

TEXAS
STATE
UNIVERSITY
The rising STAR of Texas

AR FORUM 2017

Some Examples

- Registration and Retention
- Employee Diversity
- Others



TEXAS
STATE
UNIVERSITY
The rising STAR of Texas

AFR FORUM 2017

Realized and Future Advantages

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



TEXAS
STATE
UNIVERSITY
The rising STAR of Texas

AFR FORUM 2017

Continuing Obstacles

- Report Proliferation
- The “Kitchen Sink” Dilemma
- Data Structure and Accuracy



TEXAS
STATE
UNIVERSITY
The rising STAR of Texas

AFR FORUM 2017

Things to Take Away

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



TEXAS
STATE
UNIVERSITY
The rising STAR of Texas

AFR FORUM 2017

Questions



TEXAS
STATE
UNIVERSITY
The rising STAR of Texas

AF FORUM 2017

REMINDER

Please remember to submit
your evaluation through the
MyForum app

TEXAS
STATE
UNIVERSITY
The rising STAR of Texas