



UNSW Library

# Working with Tableau, Alma, Primo and Leganto

# Agenda

- What is Tableau
- Tableau options
- UNSW Tableau
- UNSW's current limitations
- Why UNSW Library uses Tableau
- UNSW library future plans with Tableau
- Demo
- Resources

# What is Tableau

- Powerful tool for data visualisation that can connect to almost any database
- Uses drag and drop

# Tableau options

- Tableau server
  - Self-hosted
  - Tableau-hosted
  - Public (free)
- Tableau desktop
  - Enterprise
  - Public (free)

Tableau Server difference:

<http://sxtatic1.squarespace.com/static/553d5b0ce4b09e094f8e2464/t/555279ede4b0ccb06d6c589c/1431468525834/Tableau+Server+vs+Tableau+Online.pdf>

# UNSW Tableau

- Server: Self-hosted
- Tableau desktop: Enterprise
- 9 dashboards (1 per faculty)
- Sandpit and Production

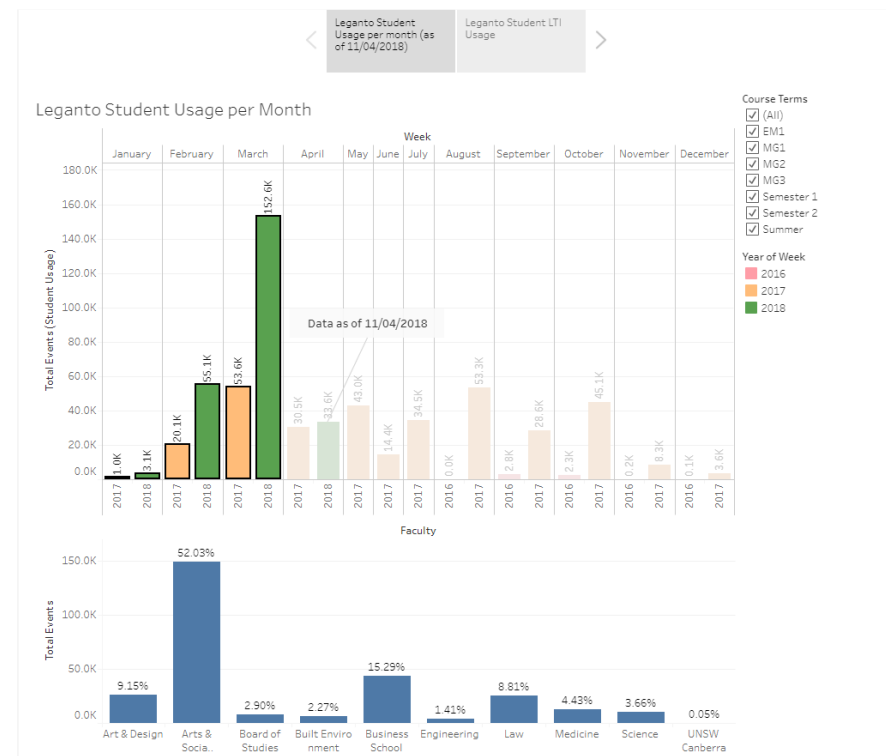
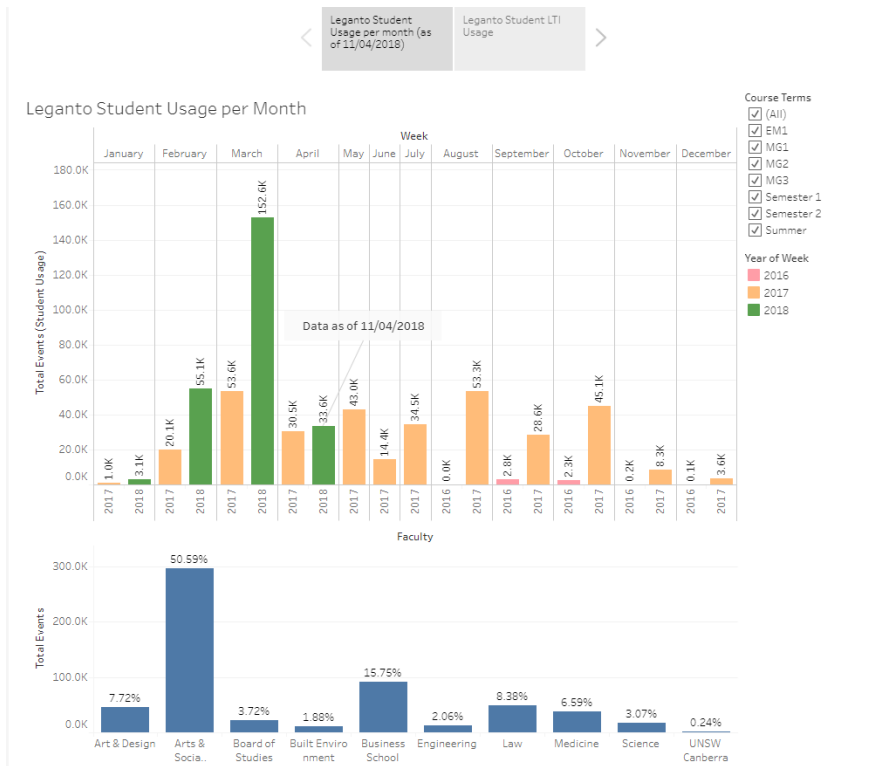
# UNSW's current limitations

- UNSW Tableau server is v10.5.1
- Tableau server requirement for Ex Libris Web Data Connector (WDC) is v2018.1
- In Alma, cannot publish to UNSW server when data comes from Ex Libris WDC
- In Primo, cannot connect to Ex Libris WDC (SalesForce Case 551559)
- Workaround: Analytics data is extracted manually to excel file so that reports can be published to UNSW Tableau server

# Why UNSW Library uses Tableau

- [Criteria of the report can be modified on the fly](#)
- [User friendly interface](#)
- [Easy to share](#)
- [Report can be displayed on top of a report via tooltip](#)

# Criteria of the report can be modified on the fly





# User friendly interface

**ExLibris Analytics**  
Count of Loan by Patron Group

Criteria Results Prompts Advanced

Subject Areas

- Fulfillment
  - Loan
  - Loan Details
  - Loan Policy
  - Loan Circulation Desk
  - Return Circulation Desk
  - Loan Date
  - Due Date
  - Return Date
  - Renewal Date
  - Last Renewal Date
  - LC Classifications
  - Dewey Classifications
  - Item Location
  - Bibliographic Details
  - Patron Detail
  - Borrower Details
  - Preferred Contact Information
  - Loan Operator Details
  - Return Operator Details
  - Physical Item Details

Compound Layout

Title: Count of Loan by Patron Group

Pivot Table

Patron Group	2015	2016	2017	2018
Associate member	96	30	32	24
Community membership	4,535	3,628	3,451	2,239
Internal users	4,092	3,896	3,802	1,318
Postgraduate	58,408	48,712	40,883	15,432
Postgraduate (off campus)	712	544	387	145
Reader	317	127		
Staff	25,857	30,947	28,131	10,834
Staff (off campus)	358	176	198	91
Student (off campus)	1,756	1,430	1,354	628
Undergraduate	76,585	66,723	50,769	19,233

Views: Title, Table, Pivot Table

**Tableau - Counts of Loans by Patron Group**

Data Analytics Pages Columns Rows

Dimensions: Patron Group, Year, Measure Names

Filters: Year

Marks: Automatic

Measures: Count, Number of Records, Measure Values

Count of Loans by Patron Group

Year / Patron Group

2015 2016 2017 2018

Year: 2015  
Patron Group: Undergraduate  
Count: 76,585

Patron Group

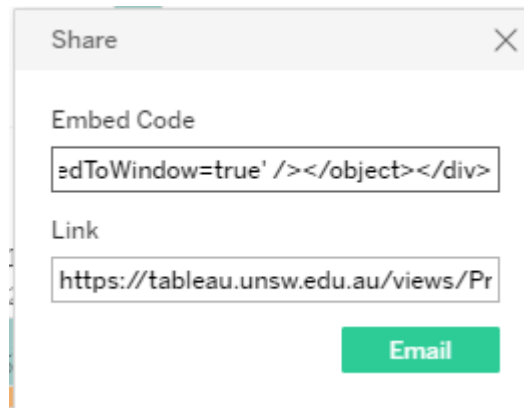
- Associate member
- Community member..
- Internal users
- Postgraduate
- Postgraduate (off ca..
- Reader
- Staff
- Staff (off campus)
- Student (off campus)
- Undergraduate

Highlight Year: Highlight Year

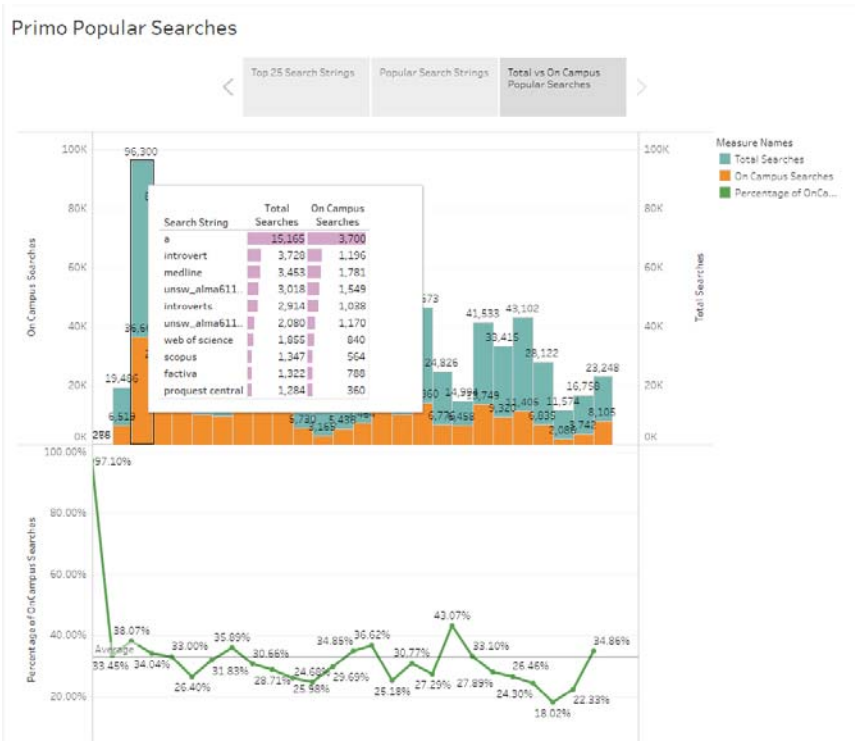
Data Source: Count of Loans by Patron Group

38 marks 1 row by 38 columns SUM(Count): 498,950

# Easy to Share



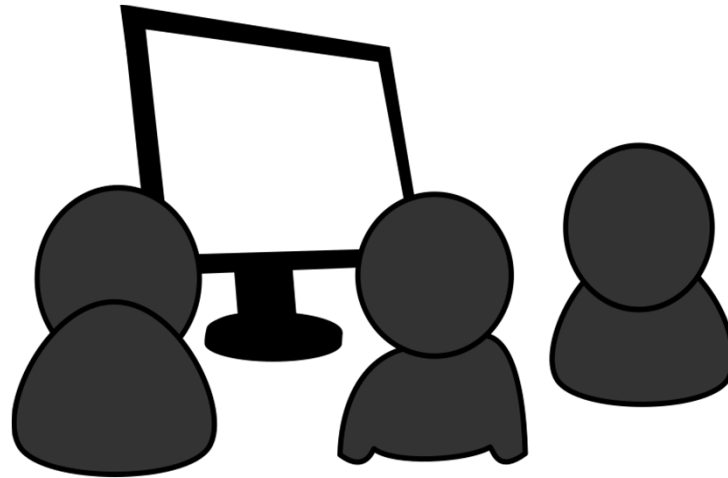
# Report can be displayed on top of a report via tooltip



# UNSW library future plans with Tableau

- Join data sources together
- Identify correlation in data
- Capture user stories

# Demo



# Resources

- <https://developers.exlibrisgroup.com/blog/Tableau-Web-Data-Connector-for-Ex-Libris-Analytics>
- Greg Davis of Iowa State University, Presentation at ELUNA 2018: *Extending Alma Analytics Analysis with Tableau Vizzes*
- ALMA-L/Primo-L/Analytics

# Questions?



Contact: Sabrina Alvaro, email: [s.alvaro@unsw.edu.au](mailto:s.alvaro@unsw.edu.au)