# Community Data Program

## Tableau as Member Service

*by Jamie Carrick*

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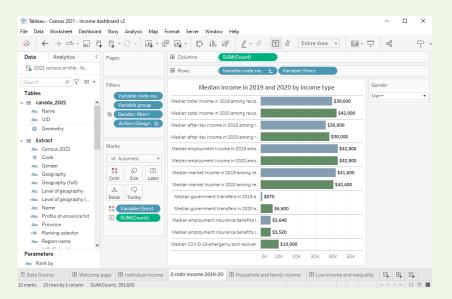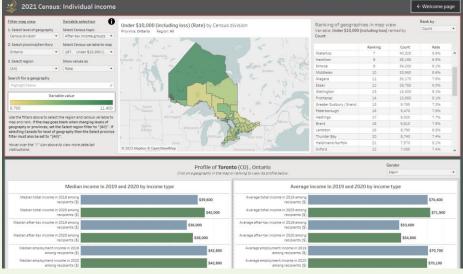
# What is Tableau?

- Data visualization and analysis platform
- Software for building and sharing interactive infographics and data tools (dashboards)

# Versions of Tableau

- Tableau Desktop
    - Premium Tableau software used to create dashboards
    - Requires annual or monthly subscription fee ("Creator" subscription)
    - Available at a discount for non-profit organizations through [TechSoup](#)
    - Includes Tableau Prep
- Tableau Public
    - Free software for creating dashboards, saving and embedding online
    - Offers most of the functionality of Desktop with a few key limitations:
        - Limit on number of rows in data sources
        - Dashboards must be saved to the cloud where they become publicly available. Anyone with the link can view and share it.
- **Tableau Reader**
    - Free software used to open and interact with Tableau Dashboards
    - Opens Tableau Packaged Workbooks (.twbx files)
    - Can't be used to create or edit dashboards
    - How we intend for CDP members to use our dashboards

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# Other versions of Tableau

For sharing dashboards:

- Tableau Cloud
    - Mainly for organizations sharing dashboards internally
    - Monthly or annual fee
    - Only registered users with "Viewer" subscription can view dashboards on Tableau Cloud
- Tableau Embedded Analytics
    - Significant cost, dependent on factors such as number of users
    - Secure, customizable embedding with support from Tableau

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# Tableau for CDP members

- Creating Tableau Dashboards for CDP members, with goal of reaching "Modest Capacity Users"

- Growing library of dashboards available in the CDP catalogue

- Dashboards present data from the Census and other sources, covering all of Canada at varying levels of geography

- Tableau training and support for CDP members

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# CDP Tableau Dashboards

- Housing Dashboard

- Community Recovery Dashboard

- IMDB ICARE Dashboard

- Village of 100, 2021 Dashboard

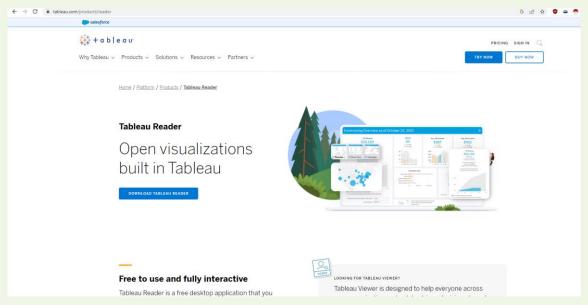- 2021 Census Profile Dashboards

- And more..

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# How to use CDP Tableau Dashboards
## Installing Tableau Reader

- Tableau Reader is all you need to access and use our Tableau data products
- Free software
- Tableau Reader can be downloaded here: https://www.tableau.com/products/reader
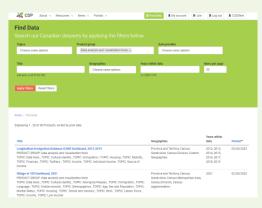
# How to use CDP Tableau Dashboards
## Finding Tableau dashboards in the CDP catalogue

- There are currently ~30 dashboards available to CDP users
- To find dashboards:
  - Interactive Infographics and Dashboards Portal (currently under construction)
  - Catalogue – *Data analysis and visualization tools* product group
- Dashboards are all in Packaged Workbook (.twbx) format, openable in Tableau Reader
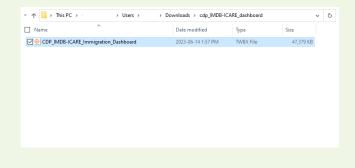


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# How to use CDP Tableau Dashboards
## Steps for opening Tableau Packaged Workbooks

1. Install Tableau Reader
2. Find and download a dashboard from the CDP catalogue
   - Same steps as downloading any other data product
3. Unzip the .zip file that is downloaded containing the packaged workbook file
4. Double-click to open the packaged workbook file in Reader OR open Tableau Reader, click File > Open and select the packaged workbook file

# How to use CDP Tableau Dashboards
## Using Tableau Dashboards

- The instructions vary by dashboard
- Dashboards contain instruction and are designed to be intuitive to use
- Select geographies and apply filters
- Most dashboards contain a welcome page and links to data sources
- If you have specific questions, email us at information@communitydata.ca

# Demonstration
## Housing Dashboard - Version 1

- [Available here](#)
- Interactive data storytelling tool focused helping users to understand and tell stories about housing in their communities
- Guides users through a selection of housing indicators from sources including Statistics Canada and CMHC
- Offering questions and relevant information to help with interpretation of the data
- The data in this dashboard is available for provinces and territories, census divisions and/or census subdivisions, and covers all of Canada. The availability of levels of geography varies by data source.

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