HOW TO USE the ISAC Research Tools

The ISAC Research Tools can be accessed at www.iowacounties.org under the member resources tab. These tools offer live, interactive access to ISAC data. Through visualizations and dashboards ISAC members are able to view and create customizable reports. This tutorial should help you get started, but please feel free to contact Robin Harlow, rharlow@iowacounties.org or 515.244.7181, at any time with questions.

Data Notes:

Per Capita: is based on the most current available population estimates from the U.S. Census Bureau. The current year is 2014.

Actuals: are based on the County GAAP Financial Report filed with the Iowa Department of Management

Budgeted: are based on the official version of the budget from the Iowa Department of Management.

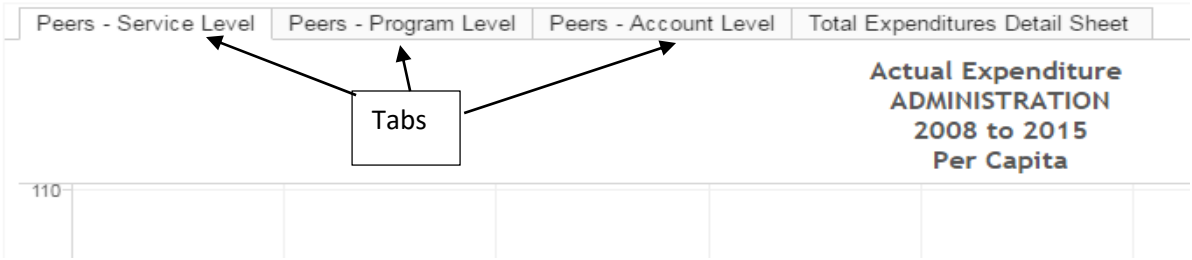
Notations: We are interested in notating data that can be construed as outliers.

Data errors: Please notify us if you feel that there is an error in the data. The data repository contains around 5 to 6 million records. This large number of records will only allow us to do a selective review of the data.

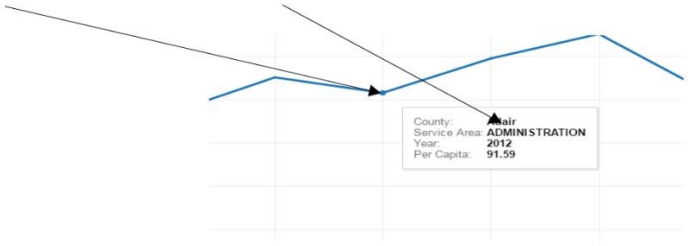
Navigation Help

Tabs

Interactive Reports have different tabs (similar to Excel), which contain different views. Be sure to select the tab that best reflects your question. To move to a different report, just click on the tab.



Hover over data to see more details.

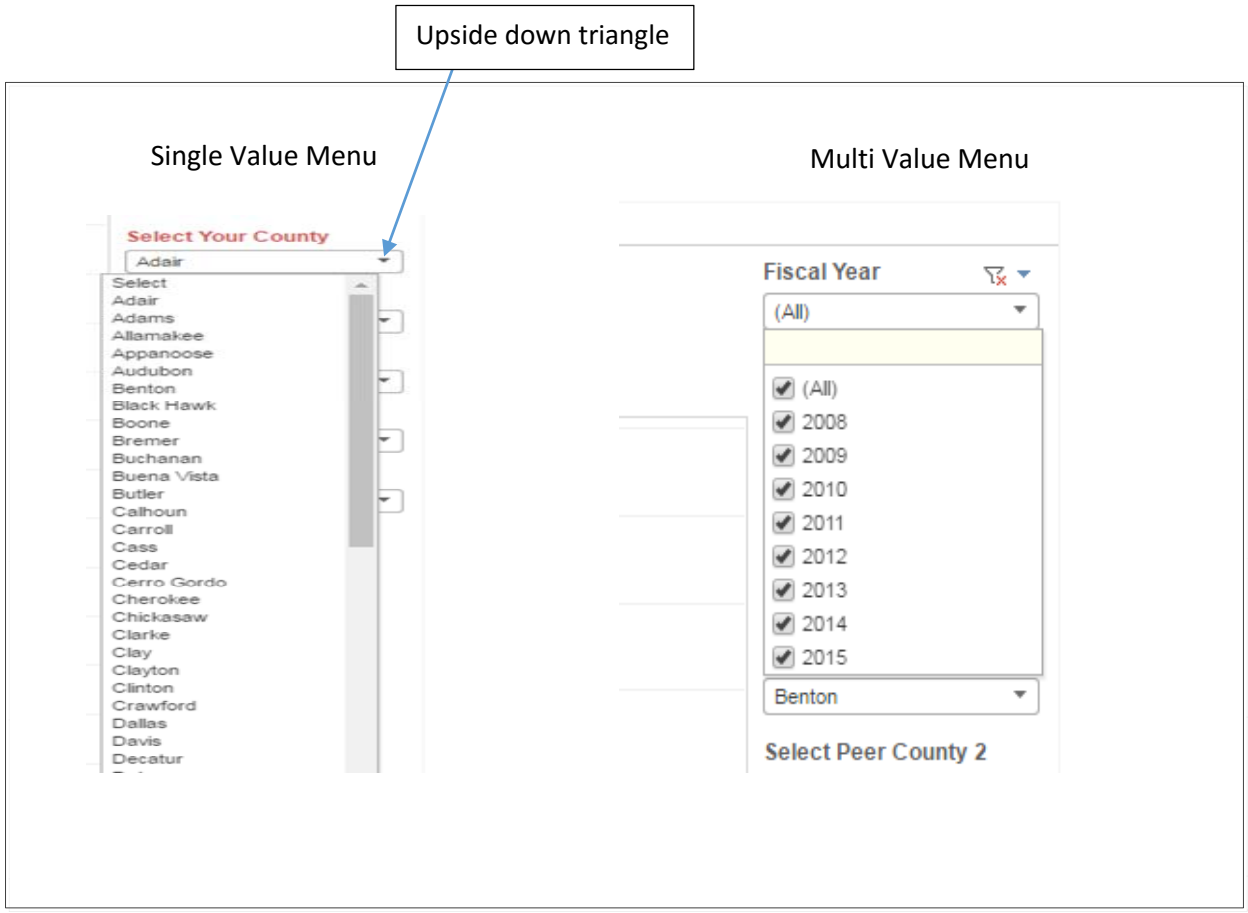


Modifying the Displayed Information on a View

The information displayed in a Tableau view can be changed so that you see less information (filtering, keep, exclude, drill up), more information (drill down), reordered (sorting) or highlighted.

Filtering data

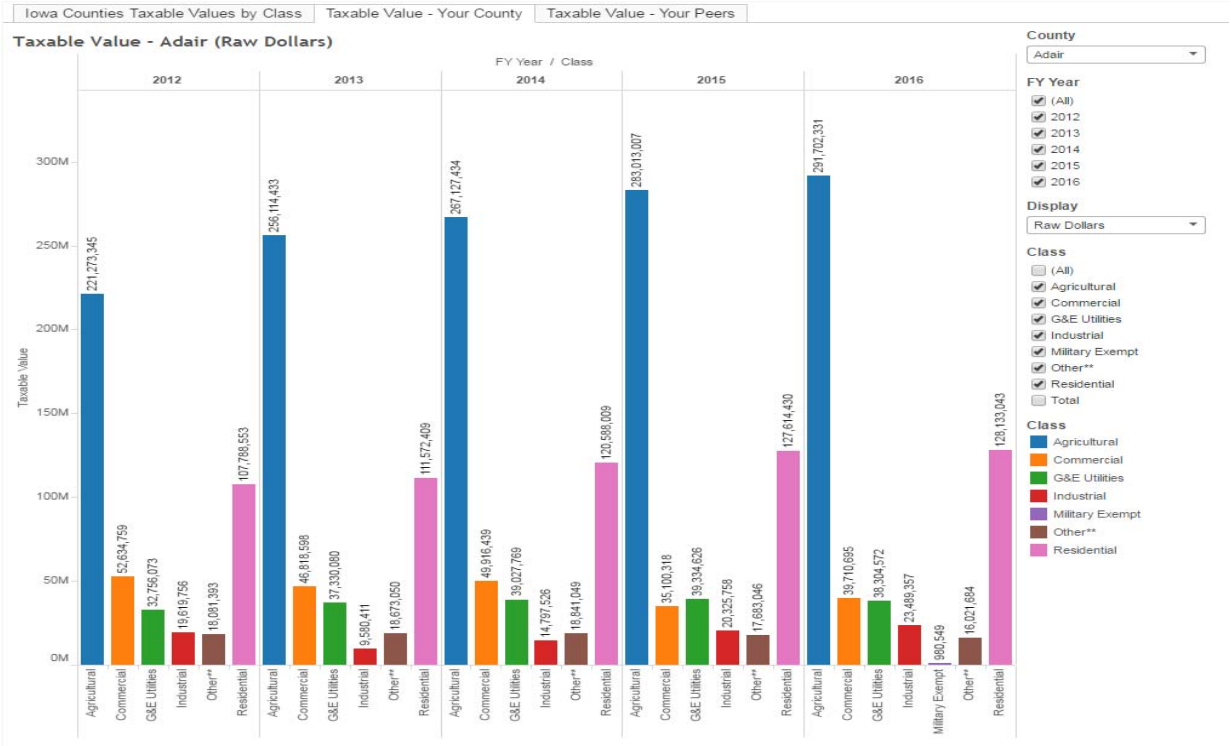
1. Click on the upside down triangle on left side of the dropdown filter.
2. Select either one item on the dropdown filter (single value menu) or multiple items (multiple value menu)



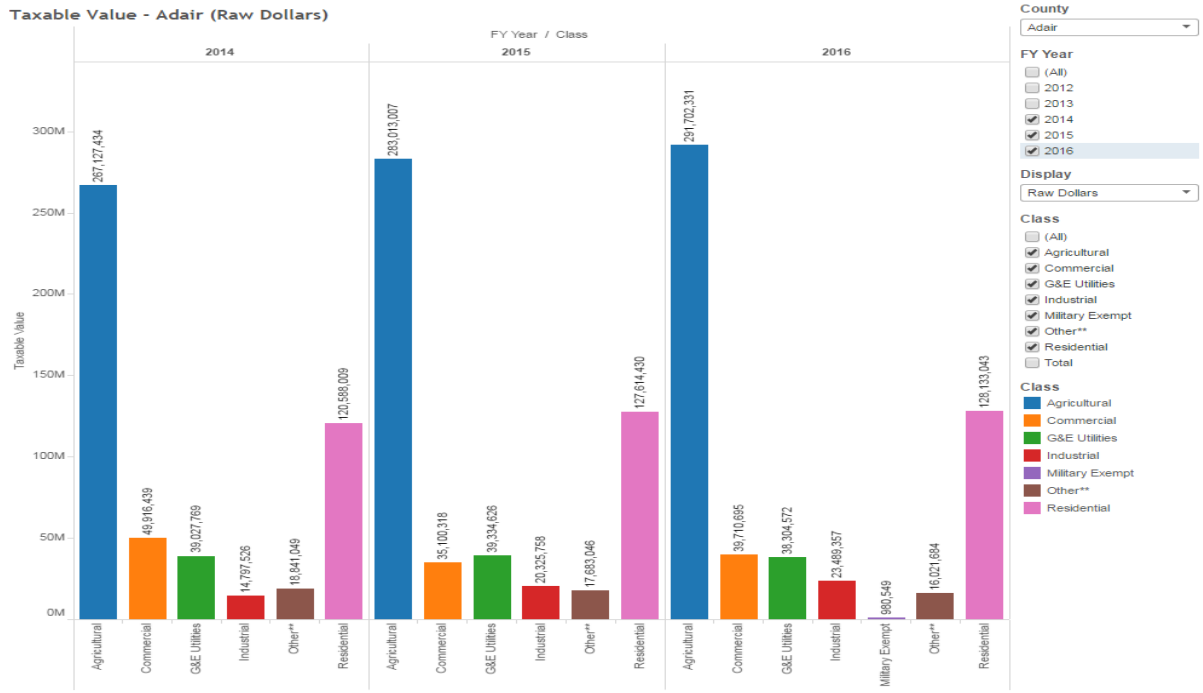
Each screen will allow the user to build their own views by modifying the options (filters) on the screen. In most cases, these filters will appear on the right side of the screen.

Below is an example of reducing the years from five years of data to three years of data

Five years:



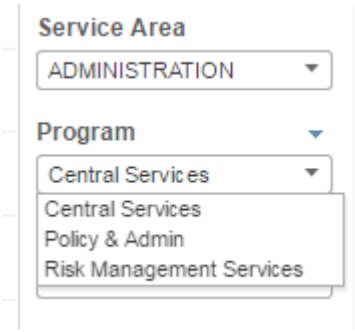
Three years:



Removing years or other filters may de-clutter the graph. Play around. You can't break anything and you can reset any view. (See the section on **Resetting and removing changes to Views**.)

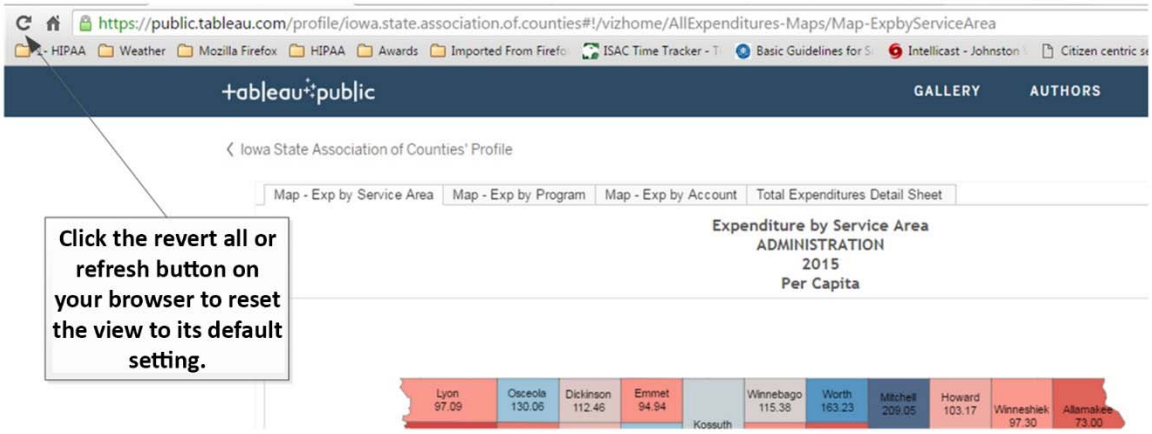
Cascading Filters

Most filters are cascading in nature. This means that the sub filters will only contain choices that are relevant to the choice above. As in the example below, selecting “Administration” as a service area will only let you select either “Central Services,” “Policy & Admin,” or “Risk Management Service.”



Resetting and Removing Changes to Views

Resetting the view to the original view can be done using the revert all or refresh button.



Please Note: You can “unselect” any given county by selecting the “select” from the list of counties. This will remove the county and its information from the view.

Downloading data from Tableau

Tableau allows for the download of summary data. Here's how:

Almost everything we publish is a "dashboard." These dashboards are usually made up of multiple "worksheets." You can only download one worksheet at a time.

1. On the webpage, click within the worksheet (i.e. in the graph or cross tab). The options to download "Data" or "Crosstab" will not appear unless you do this!
2. At the bottom of the page, is an Export icon that looks like this . Click on it.
3. Selecting **Crosstab** will create a .csv document that can be opened in Excel.
4. Selecting **Data** will bring up a screen where you can see the data with a link to download all rows as a text file, once again it will be a .csv file that can be opened in Excel. You may need to click around in charts to get the right data. I find that clicking on the title of the top left column can get you the complete dataset.

Printing the entire dashboard is possible by selecting "PDF." We have designed the dashboards to fit legal-sized paper in landscape layout.

Tabs containing the word "detail" indicate that the tab is purely a worksheet. We have developed this method in order to provide some data in formats that are more easily printed or formatted for download into your spreadsheet program.

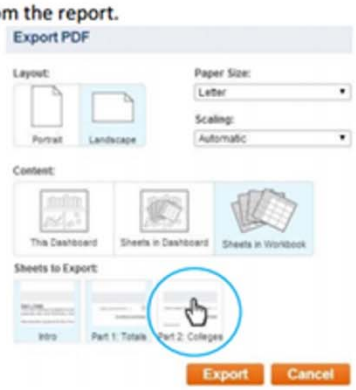
How to Print

You can quickly print all or part of a workbook using the PDF command on the export tool button. You can select your PDF orientation, paper size, and choose whether to print the entire workbook or selected sheets.

1 Select the PDF Option
From the Export toolbar button, select **PDF**.

2 Choose a Layout and Paper Size
Select either a **Portrait** or **Landscape** orientation and a Paper Size.

3 Select Sheets
Choose whether to print the entire workbook, dashboard or only certain sheets. Clicking the highlighted thumbnail for a sheet excludes it from the report.



4 Print the PDF
Click OK, then in the Export PDF dialog box, click download. Your PDF displays, ready to be printed.