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Research Activity information on Tableau Server

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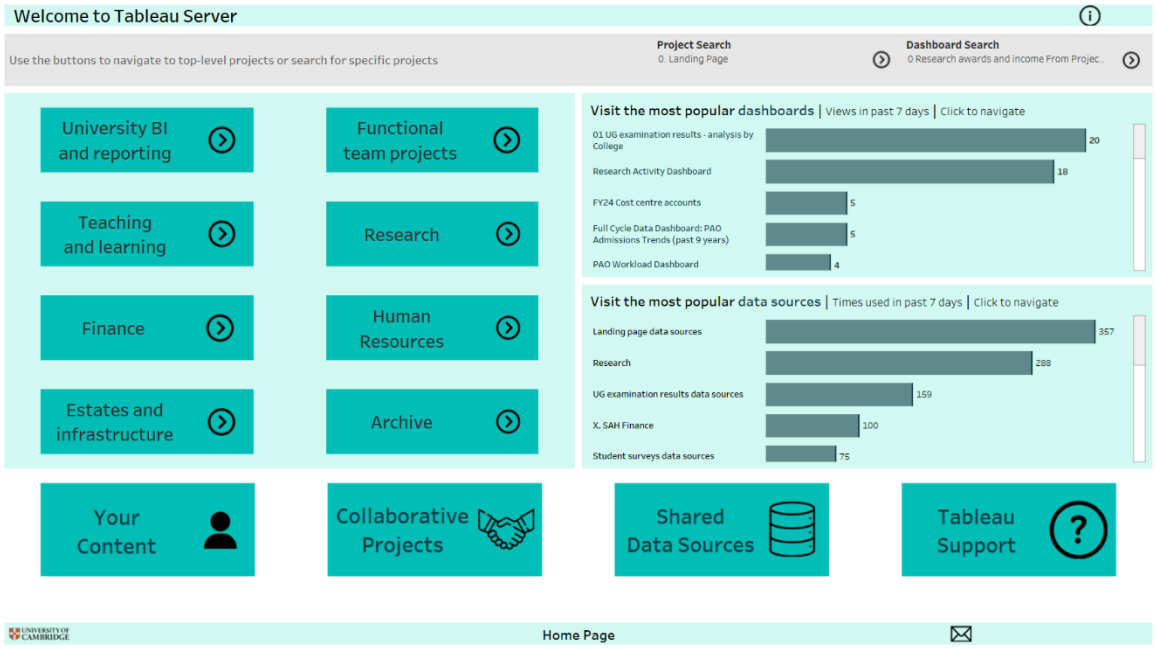
Did you know that Research Activity information is available on Tableau Server?

- Research activity information on Tableau Server: valuable but underused.
- Viewer numbers are low, but many of those viewers access the reports frequently.
- We want your feedback and ideas for improvement.



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What is Tableau Server?

Tableau Server is the University's secure platform for sharing interactive dashboards, visual analytics, and curated data sources.

Tableau Roles:

- **Viewer role**: Allows access to view dashboards shared with you. Ideal for staff who only need to consume visual insights.
- **Explorer role**: Provides access to both dashboards and curated data sources. Enables you to create custom views and build your own analyses using existing data sources. Recommended for analysts and users who need more flexible interaction with data.

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What does ‘research activity information’ mean?

A collection of data sources and reports that provide insights into:

- Research applications and awards
- Project expenditure
- Remaining research budgets

Pulled from key university systems:

- Worktribe – grant management
- X5 – former costing and pricing tool
- CUFS – financial data

  Note: uses GMS data, not general ledger

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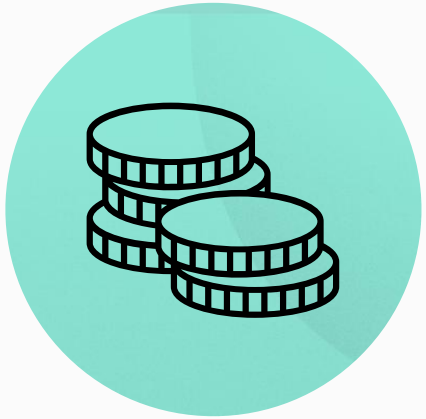
What data sources are available on Tableau Server?

Applications

Activations



Expenditure

Remaining Budget

Actual (Planning categories)

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What can I do with the Tableau Server data sources?

- Guided analytics using the Research Activity dashboard
- Tableau Explorer role – build your own dashboards using the published data sources
- The legacy Yellow Book report is also available on Tableau Server

Support is available!

- Submit enquiries via self-service: Tableau support
- Join our weekly Tableau drop-in sessions for live support. Open to all Tableau users, ideal for questions, feedback, or help with visualisation challenges.
- Booking and upcoming dates: Book a drop-in session

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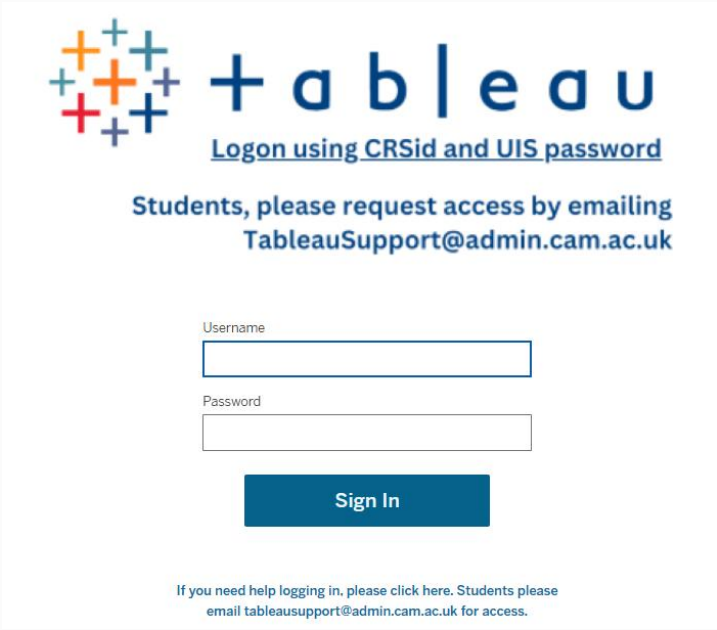
How to access

- Go to the University of Cambridge Tableau Server: https://tableau.blue.cam.ac.uk/
- Enter your CRSID in the Username and your UIS password. Do **not** use a full email address.
- Search for the dashboard you want or click through the menu options.
- Not just research activity information!



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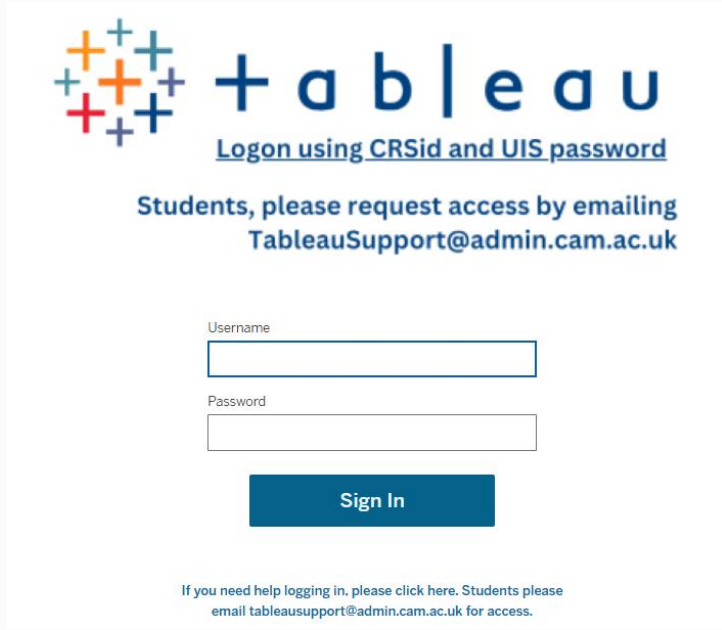
Type of access

- Default viewer access is granted to all staff members of the University and Colleges just by logging in to Tableau Server.
- Exception: Staff from TES and University partner institutions may not have automatic access; please raise a request if needed: Tableau Server access issues
- For access to specific dashboards or visibility of fields restricted by School: Content access update request
- For publishing permissions, or to request a change of role to Explorer, raise a support request: Site role update request



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Thank you!

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Business Information and Strategic Insights

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