Data Visualization: Using Tableau to Analyze Library Services and Value

Nicole Colello

Jennifer L. Murray
University of North Florida, jennifer.murray@unf.edu

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Data Visualization: Using Tableau to Analyze Library Services and Value

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Why Tableau?

• Formed Discovery and Delivery Assessment team in the Access Services unit (Circulation, Reserve, Inter-Library Loan)

• Have many systems that don’t talk to each other

• Numerous statistics kept by numerous staff using numerous tools

• Tool to easily connect, view and blend data elements → Tableau!

• Libraries Innovation Fund allowed us to purchase desktop licenses
Benefits of using Tableau

• Informed decision making
  • Drive improvement of services
  • Create workflow efficiencies
  • Aid in direction of future services

• Connect to a wide variety of data sources (Access, Excel, MS SQL, Oracle...)

• Visualize your data - tell a story

• Interact with your data

• Easy to learn and use
Data Visualization process example

1. Extract loan data out of Aleph (Run SQL reports on server)
2. Extract patron data out of Aleph (Run SQL reports on server)
3. Extract Doc Del data out of ILLiad and format (Excel spreadsheets)
4. Format in Excel
5. Create tables (from Excel spreadsheets) in Access database that is connected to student data (Student data is an Oracle database accessed via Access)
6. Create tables and queries to combine data as needed
7. Combine needed queries in Excel
8. Connect Excel spreadsheet to Tableau
9. Create Tableau reports to visualize the data
Demo

- **Circulation Events**
  - Source: Aleph SQL report (.txt file) → Tableau

- **Library Services Data & Institutional Data**
  - Average GPA of students who have used Aleph and/or ILLiad
  - Who is using and not using our services (Aleph and/or ILLiad)
  - Source: Aleph SQL reports, Excel spreadsheets, Access database

- **Borrowing and Doc Del for e-delivered materials**
  - Source: Access database
Next Steps

• Combine data from multiple systems within the Libraries

• Combine Library data with UB systems such as InfoSource

• Explore how else we might benefit from Tableau

• Goal to use Tableau across the UB Library units
THANK YOU!

Nicole Colello (ncolello@buffalo.edu)
Jennifer Murray (jlmurray@buffalo.edu)