

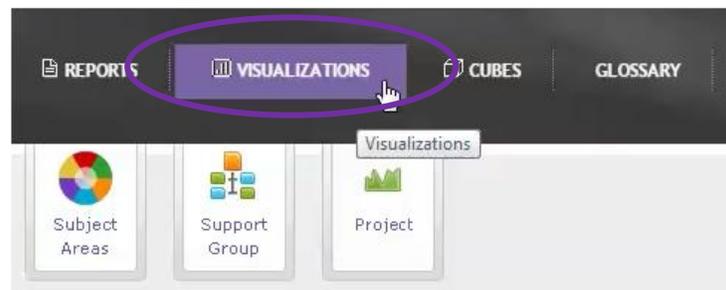
Before You Start

Please read the following policy to familiarize yourself with publishing local or departmental data using Tableau:

https://www.washington.edu/uwit/files/2015/07/DMC_Guideline_1025_Local_Data_on_Tableau.pdf

Publishing Visualizations to the UW Tableau Production Server

When you publish a visualization to the UW Tableau Production Server, your visualization will be listed in the Business Intelligence (BI) Portal under the **Visualizations** tab: <https://biportal.uw.edu/Viz>



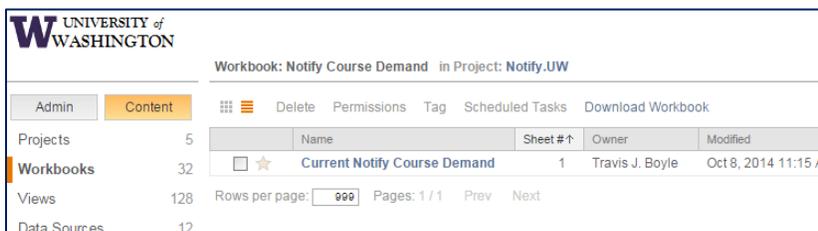
As the University's central Business Intelligence catalog, the BI Portal offers many benefits to end users:

- A single entry point for reports, cubes, and visualizations
- A consistent interface that helps the user preview and learn about the visualization
- A production grade environment set up for performance and high availability
- A high level of security so that your visualization can be exposed to all campus users or to limited number of people

In the BI Portal, each tile represents a workbook. When you create a workbook, make sure you have no more than one view per workbook. You can also publish a **dashboard** which is usually composed of multiple views. If you have more than one dashboard in your workbook, only one dashboard will be displayed in the BI Portal.

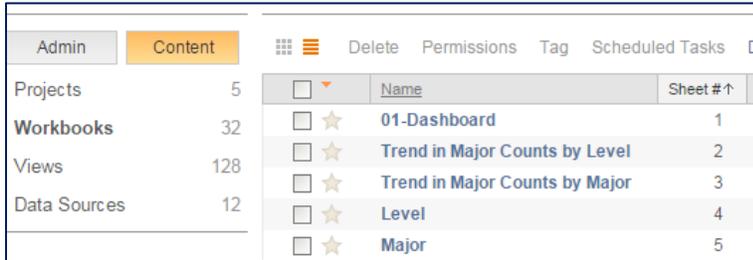
Examples:

Current Notify Course Demand view is displayed:



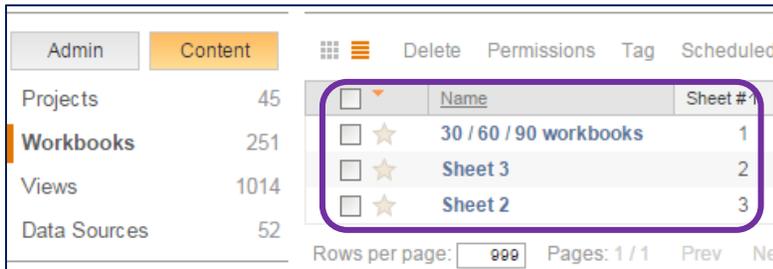
UNIVERSITY of WASHINGTON		Workbook: Notify Course Demand in Project: Notify.UW				
Admin		Content				
		Delete	Permissions	Tag	Scheduled Tasks	Download Workbook
Projects	5	Name	Sheet #↑	Owner	Modified	
Workbooks	32	★ Current Notify Course Demand	1	Travis J. Boyle	Oct 8, 2014 11:15 A	
Views	128	Rows per page: 999	Pages: 1 / 1	Prev	Next	
Data Sources	12					

01-Dashboard is displayed in the BI Portal because it is a dashboard that contains multiple views:



Category	Count	Name	Sheet #
Projects	5		
Workbooks	32	01-Dashboard	1
Views	128	Trend in Major Counts by Level	2
Data Sources	12	Trend in Major Counts by Major	3
		Level	4
		Major	5

BI Portal will not display any visualizations, since this workbook has more than one view:



Category	Count	Name	Sheet #
Projects	45		
Workbooks	251	30 / 60 / 90 workbooks	1
Views	1014	Sheet 3	2
Data Sources	52	Sheet 2	3

Connectivity

Database as Your Data Source

You will need to make sure that **NetID\a**, the Tableau service account, has access to your data source.

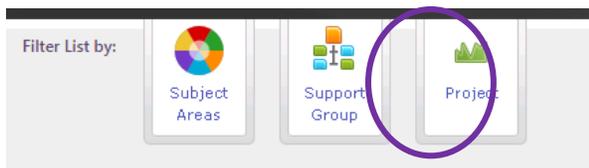
Whether you are using a live connection or a Tableau extract, NetID\a will need access. We recommend basic **READ** permissions to read only those structures necessary to use data for your visualizations. This account is used to provide data for your visualization.

Microsoft Excel Spreadsheet as Your Data Source

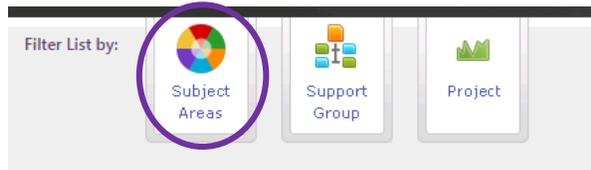
You will need to make sure that **NetID\a**, the Tableau service account, has access to the file directory where your Excel file is stored. Published visualizations will not function correctly unless the NetID\a Tableau service account has access to these files. Data source files can be on a network shared drive.

Metadata

You will need to provide **metadata** for each of your visualizations. The Tableau Server administrator will ask you to provide the **Name of the Author** of the visualization and the **Name of the Group** responsible for the content of the dashboard/view. This name will also be used to direct any questions or comments about the dashboard or visualization and for the **Support Group** filter in the BI Portal.



Specific **Subject Area** for the filter under Subject Areas (Research, University Advancement, Service & Resources, Financial Resources, Human Resources or Academics):



You will also need to provide the following:

-
- Date of the publication
- Title of your visualization
- Summary description
- Short description
- Search keywords/tags

Schedule

If you are using a data **extract** and need to refresh your data on a predefined schedule, provide the frequency rate: daily, monthly or quarterly.

Please Note: We may need to alter the time of the refresh if there are time conflicts between other processes on the server.

Project Name and Permissions

You will need to provide the following in order to set proper permissions:

- Name of the Project Space (usually the name of your unit or department)
- Contact person for your project space
- A list of users who will have access to your visualizations

Color Palette

All dashboards will need to comply with the University's color palette standards. You can find information on how to use UW defined color palette:

<https://canvas.uw.edu/courses/873898/pages/color-palettes-uw-and-customized>

Documentation

To help users understand, interpret and use your visualization, we require the following documentation for all dashboards and visualizations (examples in Appendix A):

- Overview of the dashboard
- Interpretation
- Filters used

Communication Plan

Please communicate the rollout of your published Tableau visualizations or dashboards to your unit or department. If you are rolling out dashboards that impact the entire University, please contact the EDA Communications group to create a communication plan: eda-training@uw.edu

Appendix

Overview Tab

In the Overview tab, provide a general description of the main function of the dashboard or visualization. What is the main intent of the dashboard? What is the purpose of your dashboard?

The screenshot shows a Tableau dashboard titled "Enrollment Summary" with a "View" button and an "Add to Favorites" icon. Below the title is a navigation bar with tabs for "Overview", "Tech Info", "Interpretation", "Filters", and "User Feedback". The "Overview" tab is selected, displaying the following text:

Overview

The **Enrollment Summary** dashboard displays the number of students enrolled in a given academic unit, and allows the user to break the enrollment down by various characteristics of interest (e.g. degree level, residency, race/ethnicity, etc.).

What is the measure we're tracking? The number of *students* registered in a given academic unit during the chosen time period and having a given characteristic. Every student count in this dashboard is a count of *unique* students in a given category – however, if a student falls into more than one category, that student is counted in each of the categories in which he or she falls.

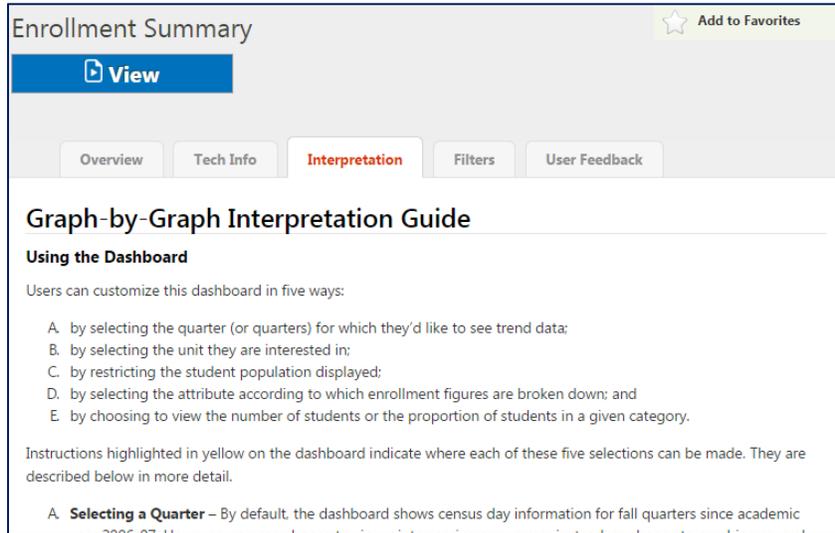
The most typical example of this is a student who is registered for two majors: that student will appear in the total count of students for each of the units with which the student's majors are associated, but will only appear once in a university-wide total. Similarly, if the user selects to view data for an entire academic year (fall/winter/spring), a student who changed class from freshman to sophomore will appear once in each category in an enrollment breakdown by class.

What is the period we're looking at? The graphs show census day trend data for the selected quarter(s) since academic year 2006-07. The default reference quarter is fall, but users can choose to view winter, spring or summer (or any combination thereof) instead.

Are all students included? By default, the dashboard only displays students who are registered in major programs that are tuition-based. However, users can choose to view all students or only students registered in fee-based major programs.

Interpretation Tab

In the Interpretation tab, tells the end user how to interpret the data being displayed in the dashboard:



The screenshot shows the 'Enrollment Summary' dashboard with the 'Interpretation' tab selected. The page title is 'Enrollment Summary' and there is an 'Add to Favorites' button. A 'View' button is also present. The navigation tabs are 'Overview', 'Tech Info', 'Interpretation', 'Filters', and 'User Feedback'. The main content area is titled 'Graph-by-Graph Interpretation Guide' and contains the following text:

Using the Dashboard

Users can customize this dashboard in five ways:

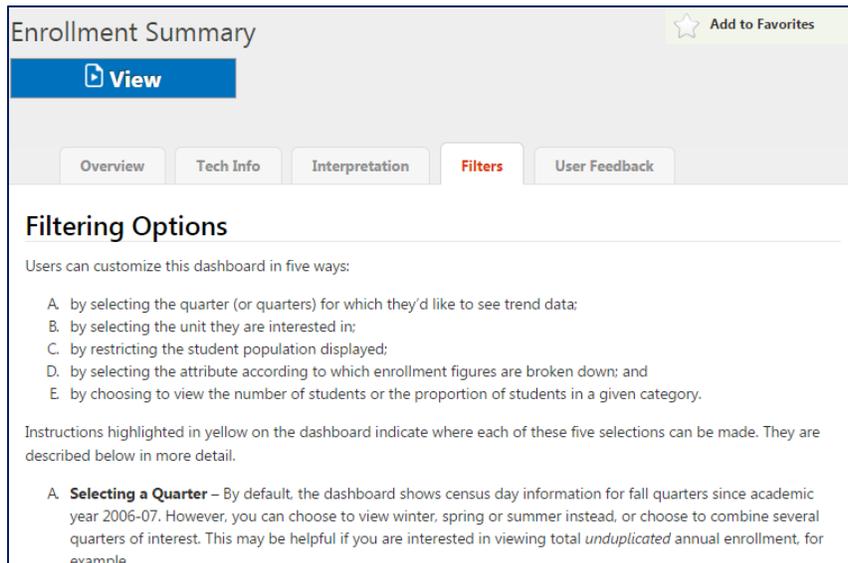
- A. by selecting the quarter (or quarters) for which they'd like to see trend data;
- B. by selecting the unit they are interested in;
- C. by restricting the student population displayed;
- D. by selecting the attribute according to which enrollment figures are broken down; and
- E. by choosing to view the number of students or the proportion of students in a given category.

Instructions highlighted in yellow on the dashboard indicate where each of these five selections can be made. They are described below in more detail.

A. **Selecting a Quarter** – By default, the dashboard shows census day information for fall quarters since academic

Filters Tab

In the Filters tab, describe all filters and their functions:



The screenshot shows the 'Enrollment Summary' dashboard with the 'Filters' tab selected. The page title is 'Enrollment Summary' and there is an 'Add to Favorites' button. A 'View' button is also present. The navigation tabs are 'Overview', 'Tech Info', 'Interpretation', 'Filters', and 'User Feedback'. The main content area is titled 'Filtering Options' and contains the following text:

Users can customize this dashboard in five ways:

- A. by selecting the quarter (or quarters) for which they'd like to see trend data;
- B. by selecting the unit they are interested in;
- C. by restricting the student population displayed;
- D. by selecting the attribute according to which enrollment figures are broken down; and
- E. by choosing to view the number of students or the proportion of students in a given category.

Instructions highlighted in yellow on the dashboard indicate where each of these five selections can be made. They are described below in more detail.

A. **Selecting a Quarter** – By default, the dashboard shows census day information for fall quarters since academic year 2006-07. However, you can choose to view winter, spring or summer instead, or choose to combine several quarters of interest. This may be helpful if you are interested in viewing total *unduplicated* annual enrollment, for example.

Definitions Tab

In the Definitions tab, provide all business terms used in the visualization:

 View

Overview

Interpretation

Filters

Definitions

User Feedback

Tech Info

Term Definitions

- **New/Incoming Student**

A student is considered "new" or "incoming" in a given quarter if the student enters his or her level of study (non-matriculated/undergraduate/post-baccalaureate/graduate/professional) at the UW in that quarter (or – for fall quarter only – the prior summer). [SDB Detail](#): A student is "new" or "incoming" in the first quarter in which that student is coded with either: Class 1 through 4, Class 5, Class 6, Class 8 or Class >=11.

- **Pre-Baccalaureate**

This category includes students registered in major programs that are open to matriculated undergraduate students but do not lead directly to a bachelor's degree (e.g. pre-science). [SDB Detail](#): Majors are included if (Major Level = 0 and Student Class <=5).

- **Bachelor**

This category includes students registered in major programs that lead to a bachelor's degree. [SDB Detail](#): Majors are included if Major Level = 1.

- **Master**

This category includes students registered in major programs that lead to a master's degree. [SDB Detail](#): Majors are included if Major Level = 2 and Major Type ≠ 0.

- **Certificate or Other**

This category includes students registered in graduate certificates and programs that fit between a master's and a doctorate level (e.g. educational specialist). [SDB Detail](#): Majors are included if Major Level = 3 and (Major Type = 5 or Major Type = 9).

- **Practice Doctorate**

This category includes students registered in major programs that are open to doctoral students and are practice-oriented. [SDB Detail](#): Majors are included if (Major Level = 3 or Major Level = 4) and Major Type = 3.