



Tableau Server User Guide

4/25/2020

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General Questions

- 1) For any Tableau, data, or dashboard questions please send an email to dhs.csp.research@state.mn.us
 - a. Requests for training on using Tableau Server
 - b. Questions about the data on the dashboard
 - c. Requests for new dashboards
- 2) For Tableau Server security or login questions contact your SSIS admin
 - a. Unable to login
 - b. Password Resets

Requesting Access to Tableau Server

- 1) If not already finished, complete the DHS data privacy training courses below
 - o <https://data-securitytraining.dhs.mn.gov/Account/Login>



Home

Please select a course or assessment by clicking on one of the links below.

Course Name	Assessment Link
Data Security and Privacy (15 Minutes) - Course	Data Security and Privacy (15 Minutes) - Assessment
How to Protect Information (35 Minutes) - Course	How to Protect Information (35 Minutes) - Assessment
Managing Security Information Problems (15 Minutes) - Course	Managing Security Information Problems (15 Minutes) - Assessment
Federal Tax Information (10 Minutes) - Course	Federal Tax Information (10 Minutes) - Assessment
Social Security Administration Information (15 Minutes) - Course	Social Security Administration Information (15 Minutes) - Assessment
Protected Health Information (PHI) (15 Minutes) - Course	Protected Health Information (PHI) (15 Minutes) - Assessment
Data Protection for Supervisors (10 Minutes) - Course	Data Protection for Supervisors (10 Minutes) - Assessment
Data Security for County Staff and Assistors (10 Minutes) - Course	Data Security for County Staff and Assistors (10 Minutes) - Assessment
Data Security for Help Desk and System Administrator (10 Minutes) - Course	Data Security for Help Desk and System Administrator (10 Minutes) - Assessment
Volunteer (15 Minutes) - Course	Volunteer (15 Minutes) - Assessment

- o The following courses are required are to be completed annually:
 - Data Security and Privacy
 - How to Protect Information
 - Managing Security Information Problems
 - Federal Tax Information
 - Social Security Administration Information
 - Protected Health Information (PHI)
 - One of the following:
 - Supervisors – Data Protection for Supervisors
 - Staff – Data Security for County Staff and Assistors

- 2) Once this is complete, you can reach out to your agency SSIS admin/mentor to configure your account for Tableau. The agency admin can use the document below to set up the account.



- Tableau User Access
- Centralized Agenci
- After your administrator configures your account in SSIS Admin, there will be a time delay where your credentials will sync over to the Tableau website.
 - **This is done at midnight, so for new users we would recommend waiting until the next day to attempt to login.**

Important things to remember:

- Your user id to log into Tableau is your SSIS user id prefaced by “county-ssis\”
 - Your password will be the same as that used for SSIS. If you are not an SSIS user, your password will be the temporary password you received when your admin set up the Tableau access. This will expire every 90 days, and you will need to request a new password.
- 3) Once you receive all of your information please log in to the website below to make sure the credentials are working, then use the rest of this guide to begin navigating through the available dashboards.
 - <https://viz.portal.mn.gov/>

Ongoing Password Updates:

- If you are not a regular SSIS user, your Tableau password will expire in 90 days and you will need to have your password reset.
- If you are a regular SSIS user, passwords for Tableau will be the same as SSIS and you will change them regularly, as passwords expire in SSIS every 30 days.

Logging in and General Navigation

- 1) Navigate to Tableau Server in your internet browser (<https://viz.portal.mn.gov/>)
 - a. Google Chrome is the preferred browser
- 2) Enter in your username and password
 - a. Agency user ids will be prefixed with "County-ssis\
 - i. Ex. County-ssis\SSISID



This system is the property of the State of Minnesota. Use of this system without appropriate authority, or in excess of authority, may result in disciplinary action, criminal sanctions and/or other appropriate action. By continuing to use this system, you are representing yourself as an authorized user.

Any activity on this system may be monitored or accessed by the State of Minnesota or other authorized officials at any time. This includes any data created or stored using this system. All such data is subject to the Minnesota Government Data Practices Act. Any identified evidence of possible criminal activity will be provided to appropriate law enforcement agencies.

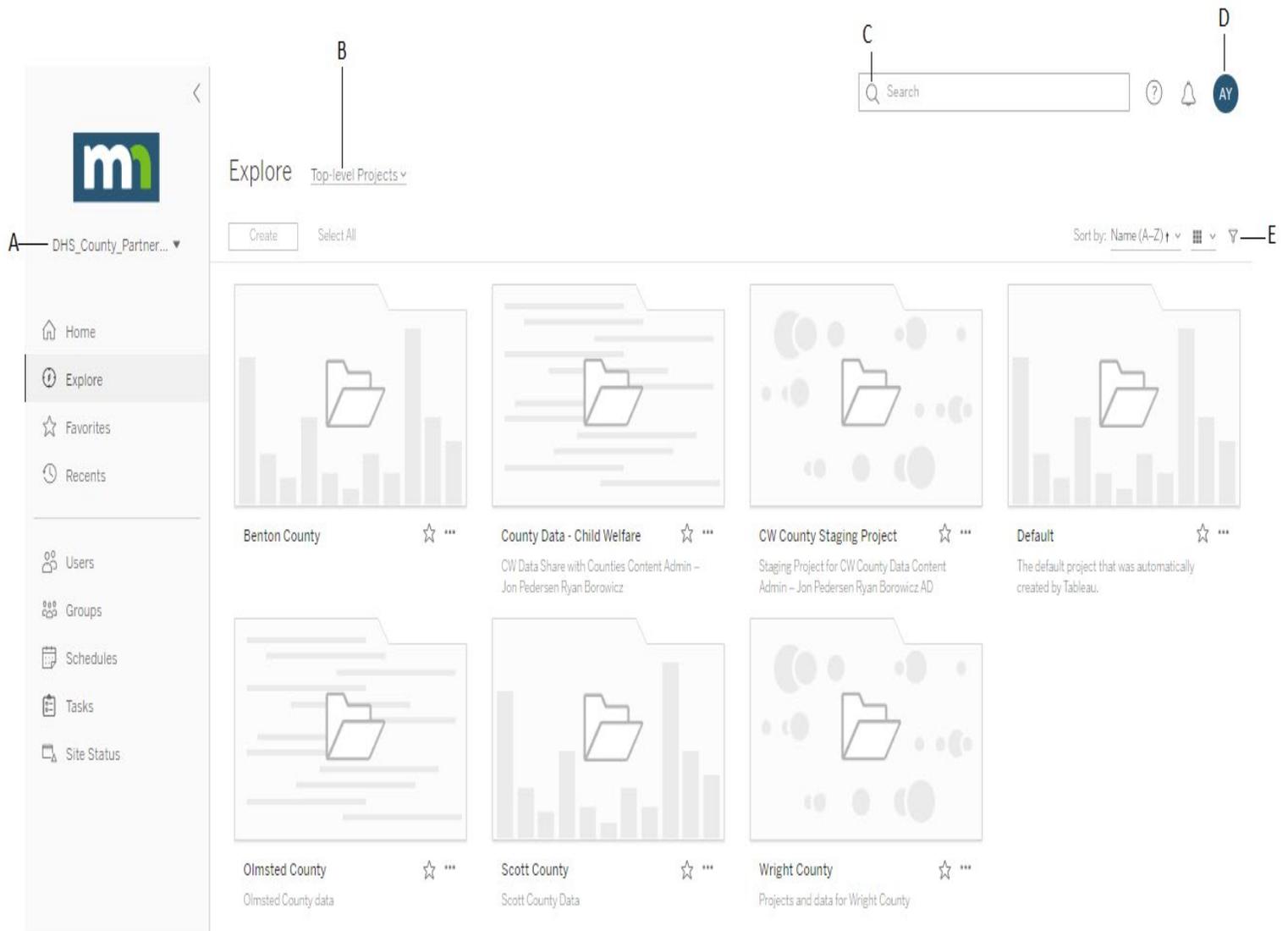
Report suspected violations and unauthorized use to ITS at 651-431-2100 or (Toll Free) 877-767-4647.

The Minnesota Department of Human Services is committed to ensuring accessibility to all users, including people with disabilities. New and updated workbooks and views produced by this system must be accessible and meet the State of Minnesota technology accessibility standard. The standard incorporates the Web Accessibility Guidelines 2.0 and Section 508 of the Rehabilitation Act of 1973. <http://mn.gov/mnit/programs/policies/accessibility/>.

Sign In →

Tableau Training Guide

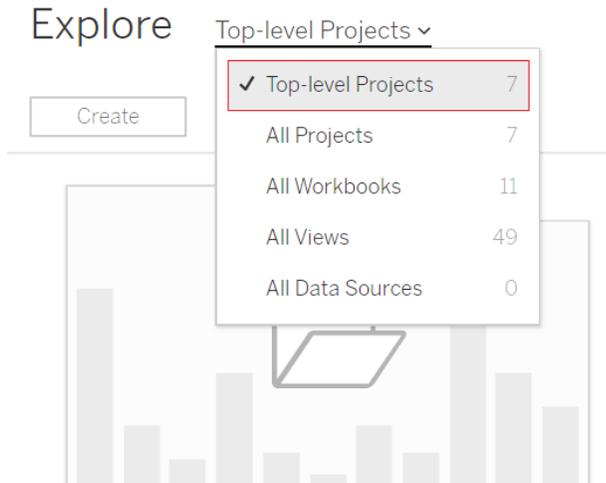
Navigate content



- A - Site picker (available if you have access to more than one site)
- B - Content type menu
- C - Quick search
- D - Your content and settings
- E - Filters

Explore:

You can click on Explore to browse the content within a site. The content type menu defaults to Top-Level Projects.



Projects

Projects are basically folders. Workbooks and data sources are published to a specific project as a way to keep them organized and control permissions to content.

Workbooks

Workbooks are the files published from Tableau Desktop. Workbooks include all of the content in the file.

Views

The views are the individual dashboards, stories, and sheets contained in a workbook.

Searching and Filtering

If you're looking for a specific view, you can look in a certain project, workbook, or you can search the filters pane searches or filters the content type you're currently looking at—so here, it's views. For example you can search for the view "Main Trends" and the relevant views that come up. Or you could filter for a specific owner, tags, modified date, etc. There's also the search at the top of the page. This searches across all content – including users, workbooks, views, and data sources.

*Toggle view mode "Grid"

*Toggle view mode "List"

Search

Explore All Views

Create Select All

Sort by: Views (All-time)

Type	Name	Views (All-time)	Workbook	Sheet	Project
<input type="checkbox"/>	(1) Main Trends	799	General Child Welfare Sta...	1	County Data - Child Welfare
<input type="checkbox"/>	(2) Race / Ethnicit...	510	General Child Welfare Sta...	2	County Data - Child Welfare
<input type="checkbox"/>	(1) Maltreatment R...	472	Federal Measures	1	County Data - Child Welfare
<input type="checkbox"/>	(1) Timeliness	419	State Measures	1	County Data - Child Welfare
<input type="checkbox"/>	(2) Caseworker Vi...	407	State Measures	2	County Data - Child Welfare
<input type="checkbox"/>	(3) Race / Ethnicit...	327	General Child Welfare Sta...	3	County Data - Child Welfare
<input type="checkbox"/>	(4) Details / Info	295	General Child Welfare Sta...	4	County Data - Child Welfare
<input type="checkbox"/>	(2) Maltreatment i...	292	Federal Measures	2	County Data - Child Welfare
<input type="checkbox"/>	(3) Foster Care Re...	268	Federal Measures	3	County Data - Child Welfare
<input type="checkbox"/>	(4) Permanency: 1...	266	Federal Measures	4	County Data - Child Welfare

View as: Grid, List

Owner: [dropdown]

Tag: [dropdown]

Modified on/after: [dropdown]

Modified on/before: [dropdown]

Created on/after: [dropdown]

Created on/before: [dropdown]

My favorites

My recents

*Sort by: Name (A-Z)

Search

Explore All Views

Create Select All

Sort by: Name (A-Z)

(1) Main Trends

(1) Maltreatment Recurrence

(1) Timeliness

(2) Caseworker Visits

Order: A-Z, Z-A

Sort: Name, Viewed by users, Workbook, Sheet, Project, Owner, Modified

Modified on/after: [dropdown]

Modified on/before: [dropdown]

Created on/after: [dropdown]

Created on/before: [dropdown]

My favorites

My recents

Using Dashboards

General Child Welfare Statistics
Summary data for Minnesota through the third week of June 2019

Child Protection

(1) Number of Child Protection Reports Received / Screened	43,263
(2) Number of Child Protection Assessments / Investigations Completed	14,926
(3) Number of Alleged Victims Screened-in / Assessed	19,935

All Child Welfare

(4) Number of Open Case Management Cases	38,832
(5) Number of Children in Case Management	49,822
(6) Number of Children Entering Out-of-home Care	2,955
(7) Number of Children Exiting Out-of-home Care	3,118

Minnesota trends over time
Number of child protection reports received / screened
Shown by screening decision

Year	Screened-in	Screened-out	Total
2015	29,864 (41%)	42,322 (59%)	72,186
2016	36,676 (46%)	43,663 (54%)	80,339
2017	37,731 (45%)	46,443 (55%)	84,174
2018	37,463 (44%)	48,640 (56%)	86,103
2019	19,371 (45%)	23,892 (55%)	43,263

*Note: Data point #2 (Number of Child Protection Assessments / Investigations Completed) is based on date the assessment was concluded, whereas data point #1 (Number of Child Protection Reports Received / Screened) is based on the date the report intake was received. Subsequently, #2 is not a subset of #1, although there is overlap in terms of the cases / reports being counted.

: Full screen mode. To exit full screen press Esc key.

: Download. Export an image, PDF, or crosstab representing the data points present in the view.

: Share. Gives you the web address of this view.

: Subscribe. We will discuss subscribing in details in the Subscriptions section.

: Revert option is used to essentially undo everything you have done to the view since loading the page.

: Refresh data to get the view to reflect the latest data in the source driving this view.



: Favorites: if there are some views or workbooks that you use regularly, you can add these to your favorites.



: Comments. You may have the ability to add comments on a specific view.



: Alert. We will discuss Alert in details in the Data Alerts section.



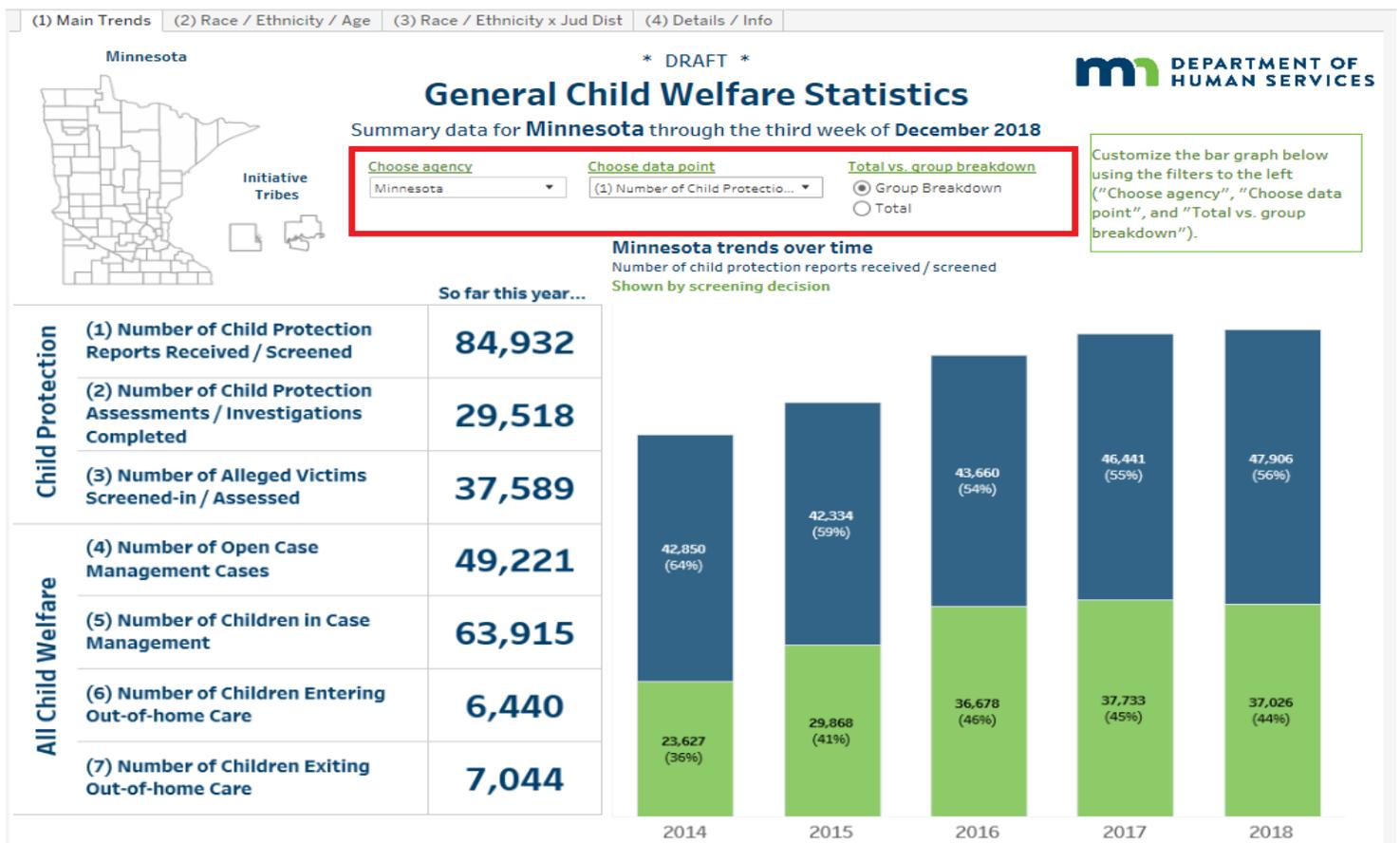
: Undo. Reverses the most recent action in the workbook.



: Redo. Repeats the last action you reversed with the Undo button.

Drill Down and Actions

Here is a published dashboard called General Child Welfare Statistics and the view selected is “(1) Main Trends”. You can interact with the information that’s on the dashboard, including using filters that the author has set up. For example, you can choose the “Choose agency” filter to select the agency you wish to view.



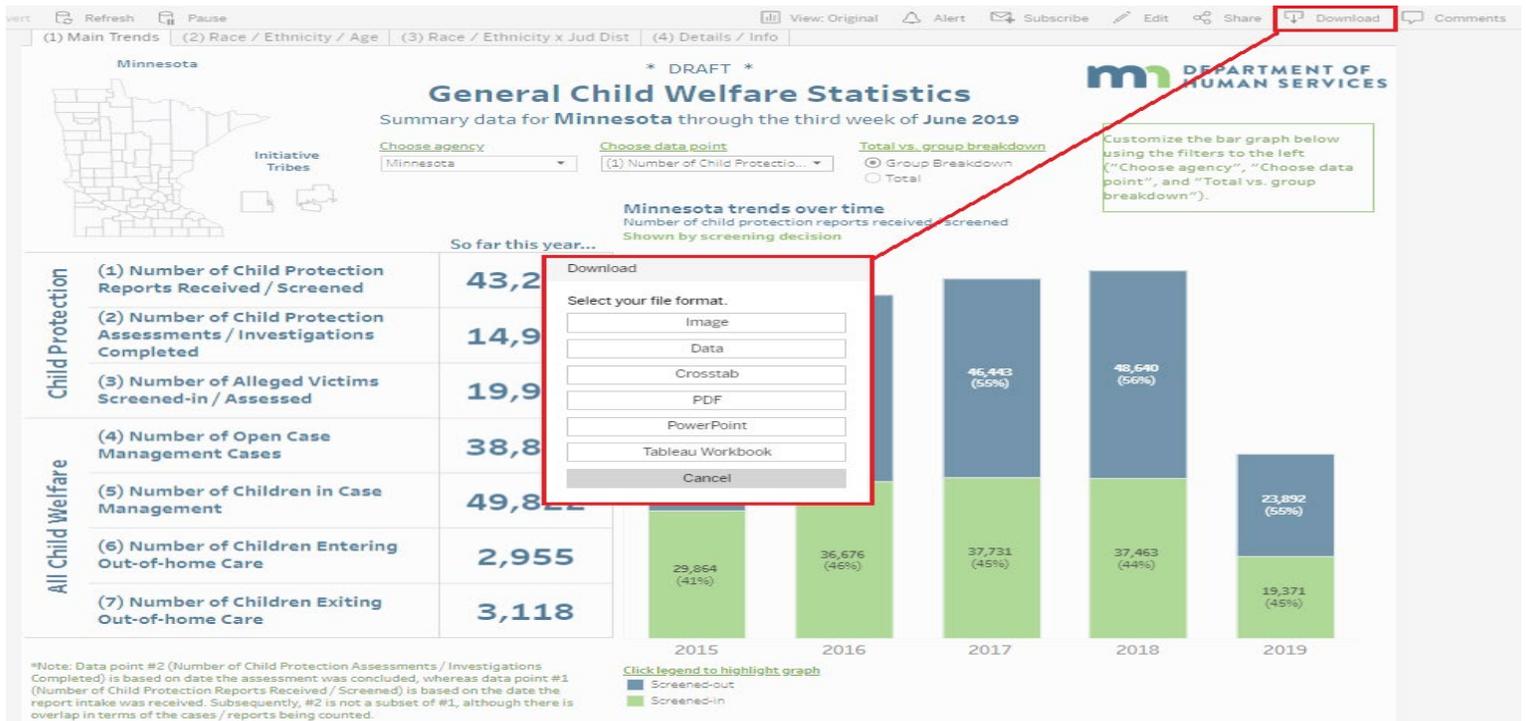
Tooltip

Many reports have a tooltip associated with data points on graphs or tables. If you hover your mouse over the mark you will see additional information that is called "Tooltips". If you use your mouse and the control key to select several marks you can then choose to 'Keep Only' those items selected or 'Exclude' the selected marks to further filter the data that you are viewing.



Download & Export

You may be able to download things like the image, underlying data, or a local copy of the workbook to your machine and do some additional analysis in Tableau Desktop. Click the download icon to select your option.



Share

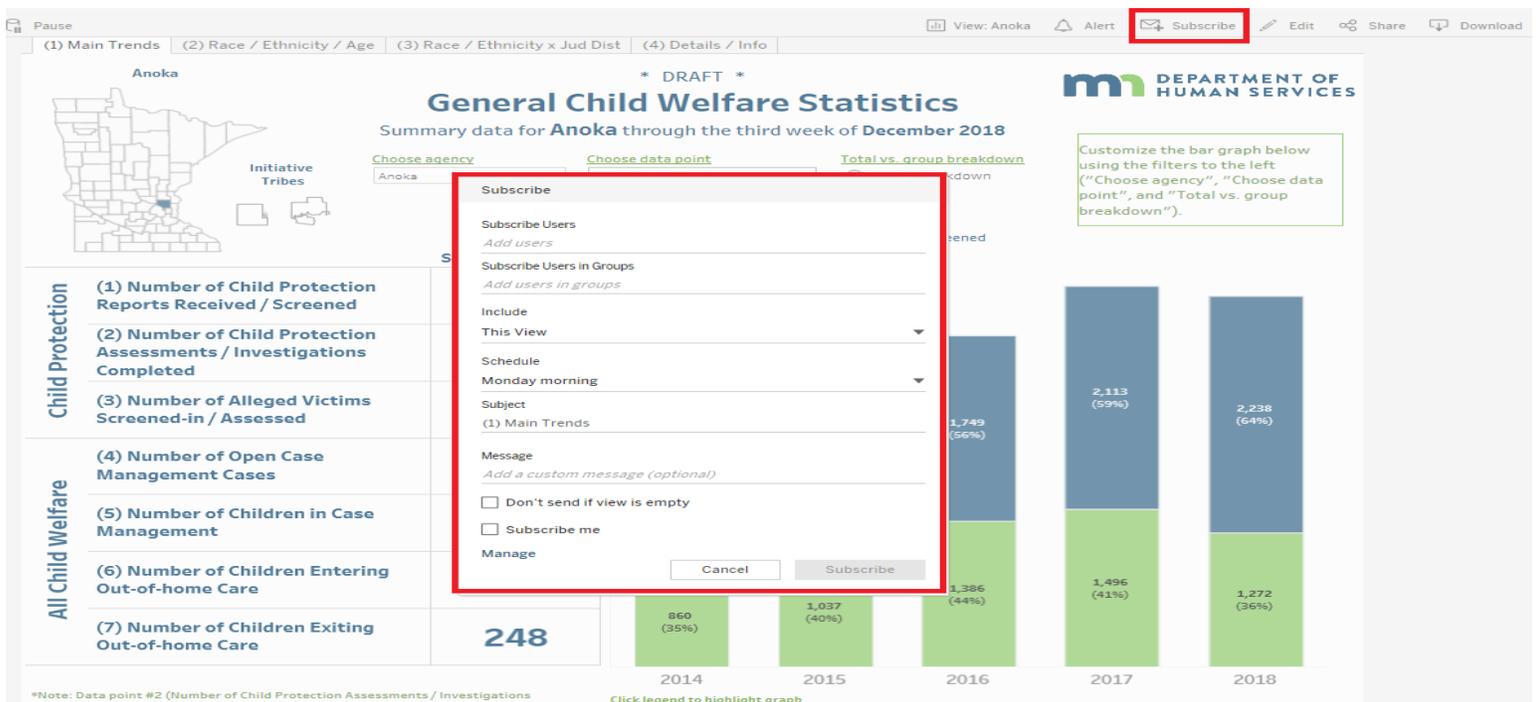
To share this view with colleagues, click on the 'Share' button and copy and paste the link into an email or other document.



Subscriptions

You know this dashboard is updated frequently, and you want to stay on top of the changes. You can set up a subscription to this content by clicking the envelope icon. This will send regular emails of the content. The email will contain a static image of the workbook at that time, and a link to the live version.

You can choose to subscribe a user, such as ourselves or another person, or, you can subscribe users in specific groups—this will respect the individual permissions of each user in the group. You can choose to include just the view or the entire workbook, set different schedules, give the email a subject line, and a message. Note that only certain users are able to subscribe others or groups.



Data Alerts

If there's a view that you want to have alert yourself if a specific threshold is passed, you can create an alert. Simply click on the numeric axis that's relevant to the threshold, then click the alert icon, and fill out the options for the condition, threshold, and email subject. Also set the frequency, and who to send it to.

The screenshot shows a Tableau Server dashboard with two stacked bar charts and a 'Create Alert' dialog box. The top chart, 'Screening decision by race / ethnicity (2018)', shows data for various racial and ethnic groups. The bottom chart, 'Screening decision by age of child (2018)', shows data for different age groups. The 'Create Alert' dialog is open, showing the configuration for an alert based on the 'Number of cases' metric.

Number of child protection reports received / screened
Screening decision by race / ethnicity (2018)

Race / Ethnicity	Blue (%)	Green (%)	Number of cases
African-American / Black	45%	55%	12,979
American Indian	48%	52%	5,382
Asian / Pacific Islander	47%	53%	1,468
Hispanic (any race)	52%	48%	8,531
Two or more races	49%	51%	10,513
Unknown / declined	73%	27%	13,589
White	57%	43%	45,987

Screening decision by age of child (2018)

Age Group	Blue (%)	Green (%)	Number of cases
0 through 2	45%	55%	17,404
3 through 5	53%	47%	17,958
6 through 8	54%	46%	20,352
9 through 11	54%	46%	18,967
12 through 14	59%	41%	16,066
15 through 17	60%	40%	13,262
18 and older	90%	10%	237

Create Alert Configuration:

- Send email if 'Number of cases' is:
- Condition: Above or equal to
- Threshold: 56000
- Condition not currently true
- Subject: Data alert - (2) Race / Ethnicity / Age
- When the condition is true, send email: Daily at most
- Recipients: Al-Hajiby, Yousif x
- Recipient name or username: [Empty]
- Create Alert button

Custom Views

You also can choose to create a custom view of the dashboard, essentially remembering these interactions, by clicking where it indicates that the view is the original. This way, you can come back to the specific configuration of this view, keeping an eye on the problem area. Let's name this "Anoka" and you can share our custom view by making it public, so others can see the insight that you have found as well.

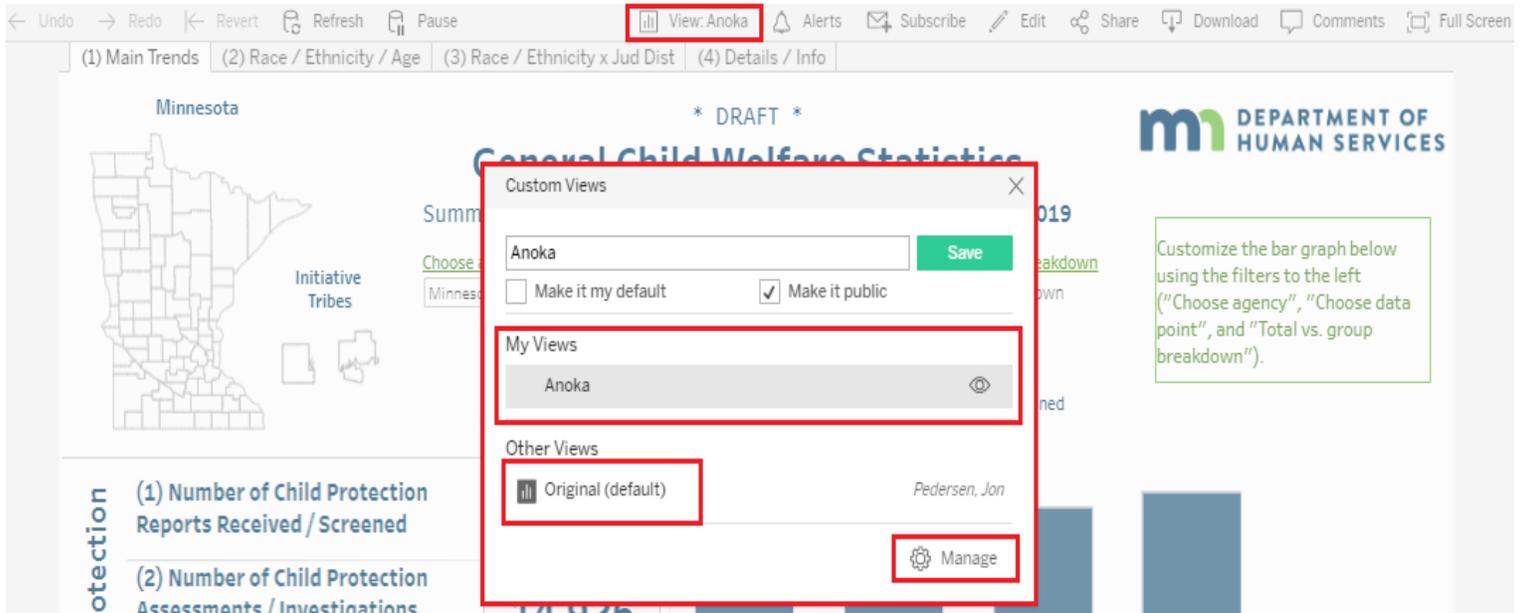
Custom view options

Make it public: Others can see your custom view

Make it my default: You are the only one who can see the custom view

The screenshot displays the Tableau Server interface. At the top, a navigation bar includes 'Undo', 'Redo', 'Revert', 'Refresh', 'Pause', 'View: Original', 'Alerts', 'Subscribe', 'Edit', 'Share', 'Download', 'Comments', and 'Full Screen'. Below this, a dashboard for Minnesota is visible, featuring a map of Minnesota and a bar chart. A 'Custom Views' dialog box is open in the center, titled '* DRAFT *'. The dialog contains a text input field with the name 'Anoka', a 'Save' button, and two checkboxes: 'Make it my default' (unchecked) and 'Make it public' (checked). A red arrow points to the 'Save' button. Below the dialog, a list of 'Other Views' shows 'Original (default)' selected. The background dashboard includes a map of Minnesota and a bar chart with a legend. A text box on the right side of the dashboard reads: 'Customize the bar graph below using the filters to the left ("Choose agency", "Choose data point", and "Total vs. group breakdown").'

*You can toggle between this view and the original view very easily, and it's easy to manage our views.



Manage your Custom Views



: Rename the View



: Delete the custom view



: Toggle to make the view private or public

*Delete Custom Views: View: Original → Manage → Delete

General Child Welfare Statistics
Summary data for **Anoka** through the third week of **December 2018**

Choose agency: Anoka
Choose data point: (1) Number of Child Protection Reports Received / Screened
Total vs. group breakdown: Group Breakdown, Total

Child Protection

- (1) Number of Child Protection Reports Received / Screened
- (2) Number of Child Protection Assessments / Investigations Completed
- (3) Number of Alleged Victims Screened-in / Assessed

Child Welfare

- (4) Number of Open Case Management Cases: 2,290
- (5) Number of Children in Case Management: 2,935
- (6) Number of Children Entering Case Management: 2,113 (59%)

Custom Views Manage

My Views

- Anoka (star icon)

Other Views

- Original (default) - Pedersen, Jon

Done

Customize the bar graph below using the filters to the left ("Choose agency", "Choose data point", and "Total vs. group breakdown").

Favorites

If this content is something we want to be able to come back to easily and often, we can click this star to make it a favorite. All our favorites are in the menu at the upper right.

Explore / County Data - Child Welfare / General Child Welfare Statistics / (1) Main Trends ☆

View: Anoka Alerts Subscribe Edit Share Download Comments Full Screen

(1) Main Trends (2) Race / Ethnicity / Age (3) Race / Ethnicity x Jud Dist (4) Details / Info

General Child Welfare Statistics
Summary data for **Minnesota** through the third week of **June 2019**

Choose agency: Minnesota
Choose data point: (1) Number of Child Protection Reports Received / Screened
Total vs. group breakdown: Group Breakdown, Total

Minnesota trends over time

Customize the bar graph below using the filters to the left ("Choose agency", "Choose data point", and "Total vs. group breakdown").

Return to Home Page

After you have finished exploring a workbook, you may wish to return to the Tableau Server home page to open a new report; this can be done by clicking on the file path icon in the top left of the screen.

Minnesota * DRAFT *
General Child Welfare Statistics
Summary data for Minnesota through the third week of June 2019

Choose agency: Minnesota
Choose data point: (1) Number of Child Protectio...
Total vs. group breakdown: Group Breakdown, Total

Minnesota trends over time
Number of child protection reports received / screened
Shown by screening decision

Customize the bar graph below using the filters to the left ("Choose agency", "Choose data point", and "Total vs. group breakdown").

Account Settings Page

Here you can see the published content (if relevant), and manage things like alerts and subscriptions.

Explore Top-level Projects v

Search

My Content
My Account Settings
Make This My Start Page
Sign Out

Benton County ☆ ...
County Data - Child Welfare ☆ ...
CW County Staging Project ☆ ...



Al-Hajiby, Yousif

USER • PWYXA01 • Site role: Site Administrator Explorer • Last sign in: Sep 17, 2019, 8:54 AM • Yousif.Al-Hajiby@state.mn.us

- Projects 0
- Workbooks 0
- Views 0
- Data sources 0
- Alerts 0
- Subscriptions 0
- Settings**

Username	PWYXA01
Display Name	Al-Hajiby, Yousif
Email	<input type="text" value="Yousif.Al-Hajiby@state.mn.us"/>

Save Changes

Saved Credentials

Clear All Saved Credentials...

ServiceNow ITSM	Add
Anaplan	Add
Google Ads	Add
Intuit QuickBooks Online	Add
Marketo	Add
Oracle Eloqua	Add
Box	Add
Dropbox	Add
Google Drive	Add
OneDrive	Add
Snowflake	Add