



CHAPTER 2

User Guide - Logging into the Tableau Server and Accessing Community Dashboards

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Periodic Review

Annual or as needed

Revision History

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This document is part of Lake Washington Institute of Technology Standard Operating Procedures Library developed by Research & Grants. The Library provides version history and access to materials and discussions captured during protocol development.

1.0 Scope: The purpose of this guide is to help a user navigate to data dashboards in the Tableau Server.

2.0 Materials/Software/Supplies:

2.1. Computer with Internet access through browser.

2.1.1. Some browsers are more compatible with this software than others. Please use Chrome, if possible.

2.2. Tableau Desktop software

2.3. Tableau server login information.

2.3.1. You must attend training to obtain a log-in to the server.

3.0 Equipment:

3.1. Computer with internet access

4.0 Safety:

4.1. Remember to take frequent breaks from computer use to prevent eye strain!

5.0 Procedure – Log into Your Tableau Account

5.1. If necessary, turn on the computer. If using an LWTech computer, enter your login information.

5.2. Open a browser – we recommend Chrome, if possible.

5.3. Navigate to [LWTech’s data webpage](http://LWTech.edu/data): LWTech.edu/data (Figure 1)

5.4. Scroll down to the category “Dashboards for Employees” and click on the button “Log into your Tableau account”. (Figure 2)

5.5. You will be redirected to the [Tableau log in screen](https://tableau.sbctc.edu/t/lwtech): <https://tableau.sbctc.edu/t/lwtech> (Figure 3)

5.6. Enter the login information (username and password) you received at training (Circled Image in Figure 3).

5.6.1. Username and password are case sensitive

5.7. Select “Sign In” to log into the server

The screenshot shows the LWTech Public Data website. At the top, there is a blue navigation bar with the LWTech logo and various utility links like 'Current Students', 'Faculty & Staff', 'International', 'Foundation', 'Directory', 'Calendar', 'News', and 'Search'. Below the navigation bar, there are main site categories: 'Academic Programs', 'Admissions & Registration', 'Campus Life', and 'About LWTech'. The main content area is titled 'Data' and includes a welcome message. It features several dropdown menus for selecting data categories: 'Enrollment' (with 'Student Enrollment' selected), 'Outcomes' (with 'Credit Attainment', 'Student Completion', 'Completion Rates', and 'Transfer Rates' options), and 'Research & Grants' (with 'Data', 'Reports', and 'Current Institutional Grants' options). A 'QUICK LINKS' section is also present with links to 'Gainful Employment', 'Communications & Marketing', 'Budget Services', and 'Government Relations'.

Figure 1

Student Surveys

- Community College Survey of Student Engagement: 2016 Results
- Community College Survey of Student Engagement: Year-by-Year Trends
- Survey of Entering Student Engagement: 2017 Results
- Survey of Entering Student Engagement: Year-by-Year Trends

Outside Agencies & Research

- State Board for Community and Technical Colleges
- Washington State Employment Security Department
- U.S. Census Bureau
- Georgetown University

Dashboards for Employees

[Log into your Tableau account](#)

Having troubles? Want to set up an account? [Contact IR staff](#) for details.

Figure 2

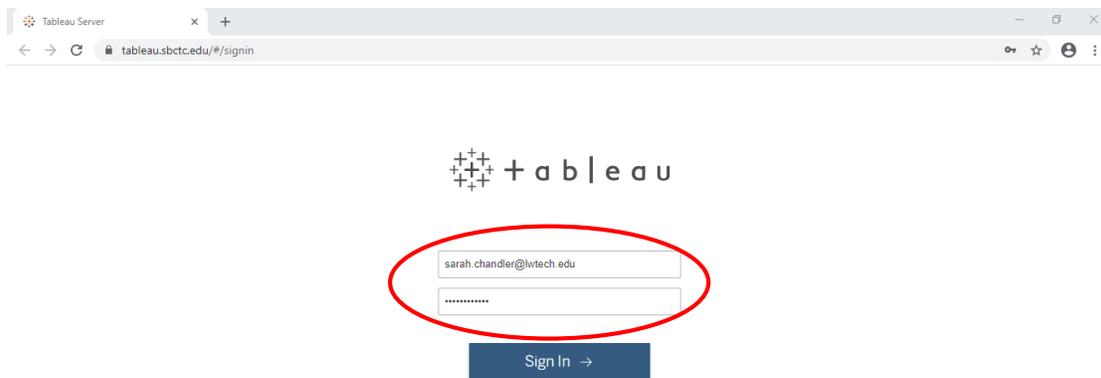


Figure 3

6.0 Procedure – Accessing the Dashboards

6.1. After you have logged in, you will see projects specific to your account. All users have access to four projects: 1) *Core Theme: College Community*, 2) *Core Theme: Pathways*, 3) *Core Theme: Student Achievement*, and 4) *Enrollment*. However, different users have access to different projects, so your screen might look different than your colleague's. Please see Figure 4 for a sample of what you might see.

To set the *Explore Top-level Projects* as your home page (circled in yellow on the left), click on your initials/profile icon in the upper right-hand corner (circled in yellow on the right). Then click “Make This My Homepage.”

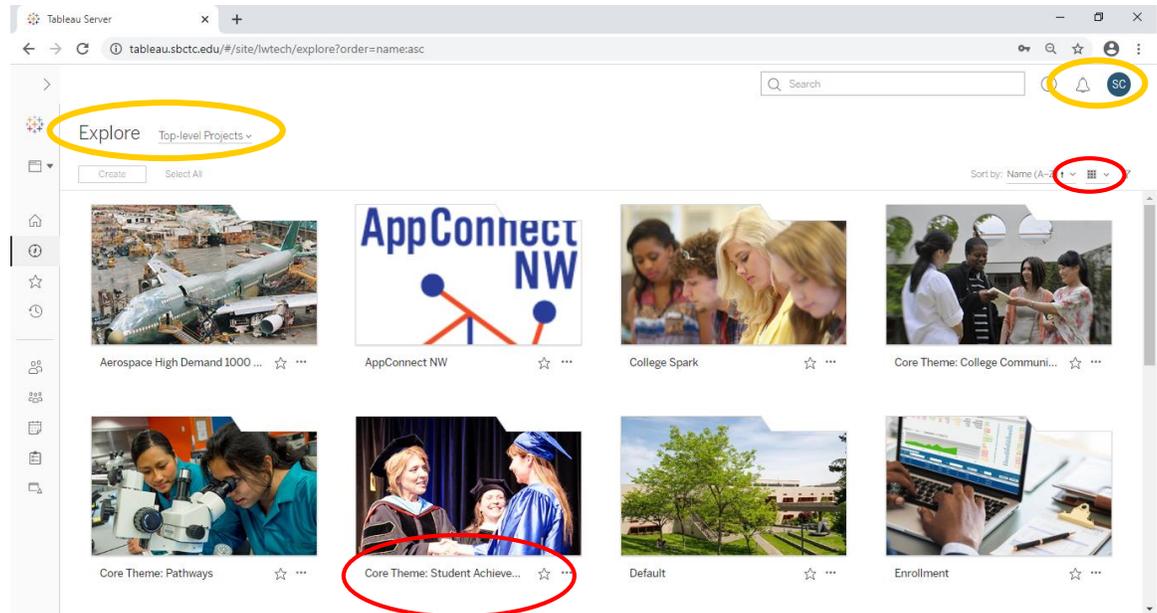


Figure 4

6.2. To interact with data dashboards, click on the project you would like to view. In this case, select *Core Theme: Student Achievement* (Circled image in Figure 4).

6.2.1. Each of the square icons in Figure 4 represents a separate project published to the Tableau Server.

6.2.2. In the upper right-hand corner, you can switch from an icon view to a list view by selecting whichever you prefer. (See circled image in Figure 4)

6.2.3. Click directly on the image corresponding to the project you wish to view.

6.3. After you select the project you would like to interact with, you will see different workbooks associated with that project (Figure 5). In this example, you are viewing all workbooks associated with the project *Core Theme: Student Achievement*.

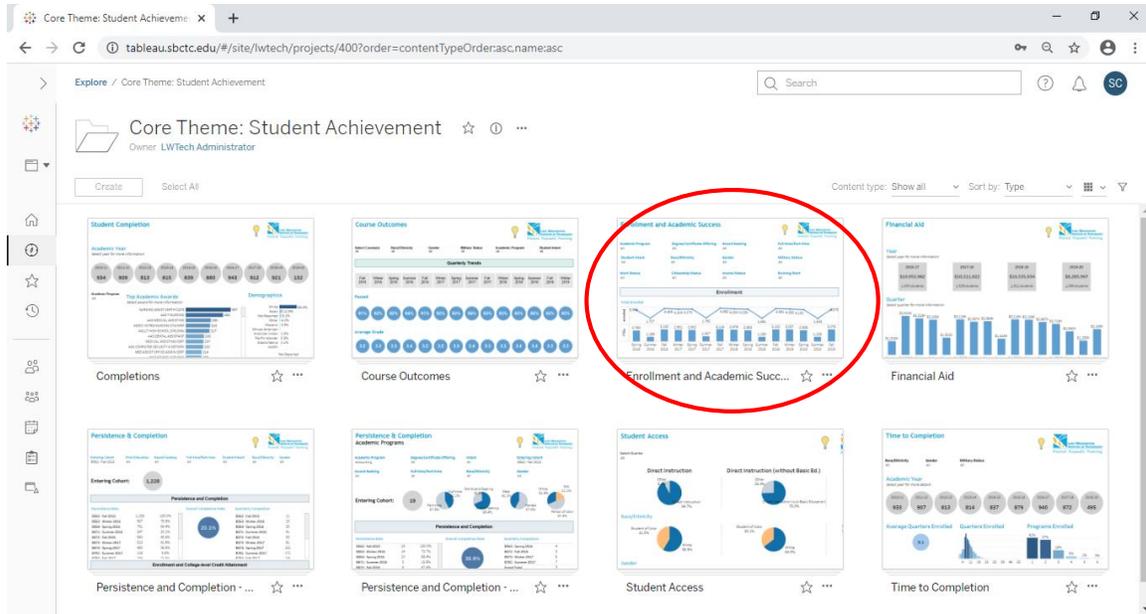


Figure 5

- 6.4.** To view and interact with the data dashboards, select one of the workbooks. For this example, select *Enrollment and Academic Success* (Circled image in Figure 5).
- 6.5.** Clicking on the workbook will bring you to all dashboards related to the workbook *Enrollment and Academic Success* (Figure 6). In this example, there are two dashboards titled *Enrollment and Academic Success* and *Program Information*.
- 6.6.** To view and interact with the dashboard *Enrollment and Academic Success* (Circled image in Figure 6), click on the dashboard thumbnail.
 - 6.6.1.** To view and interact with the dashboard *Program Information*, click on that dashboard thumbnail instead. More information about navigating to the dashboard *Program Information* will be covered in Chapter 3.

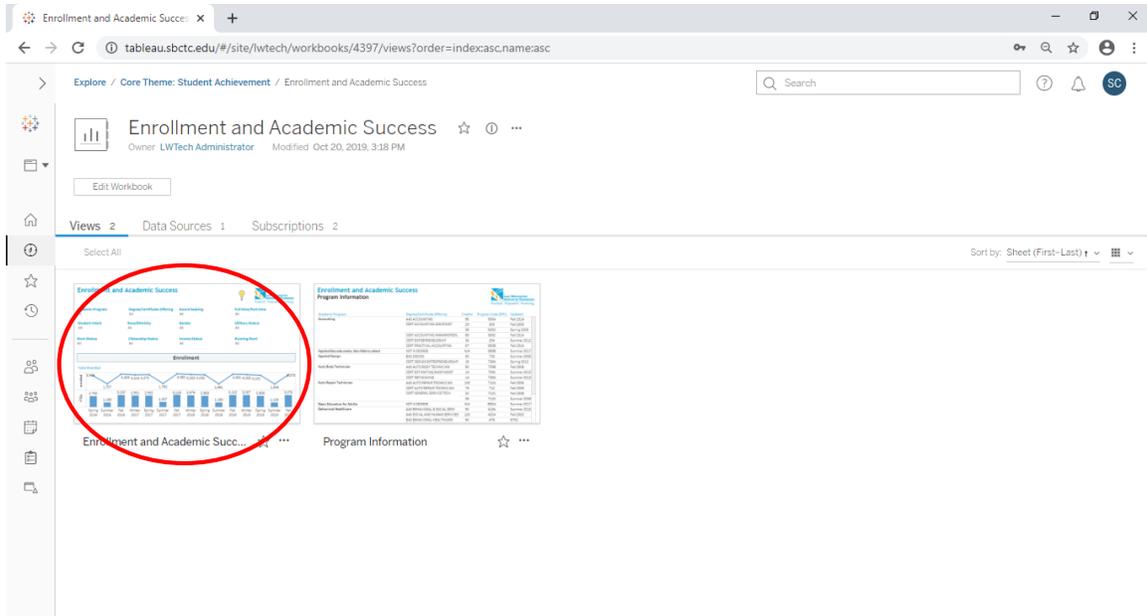


Figure 6

7.0 Changing Your Password

7.1. In the upper right-hand corner, click on your initials and select “My Account Settings” (Figure 7)



Figure 7

7.2. Your name and user information will load. Click “Change Password” to change your password (Figure 8)

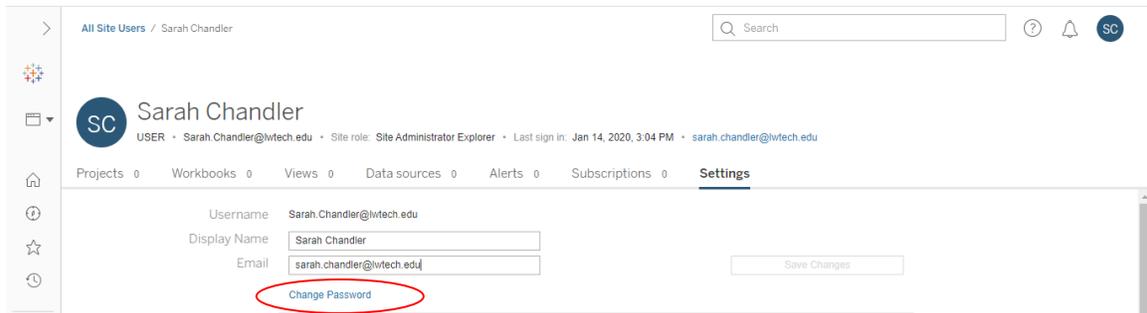


Figure 8

7.2.1. Your password will not automatically update when you change your Windows/LWTEch log-in.

7.3. Enter your new password and select “Save.” Your password is now changed.
(Figure 9)

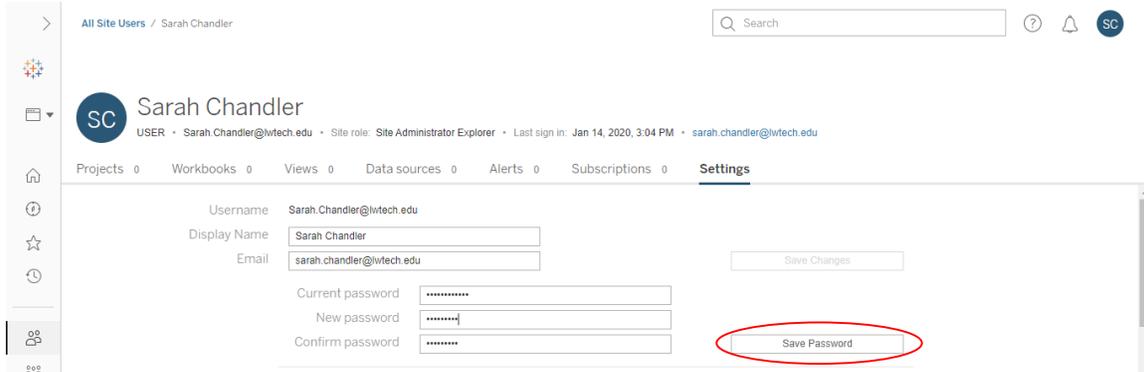


Figure 9

8.0 Procedure – Logging off the Server

8.1. Always log off the server when you have completed your work/analysis. To do this, click on your initials in the upper right-hand corner and select “Sign Out” in the menu provided (Figure 10).

8.2. Once you select “Sign Out”, you will be redirected back to the original log in screen (Figure 11). You are now logged off the server.

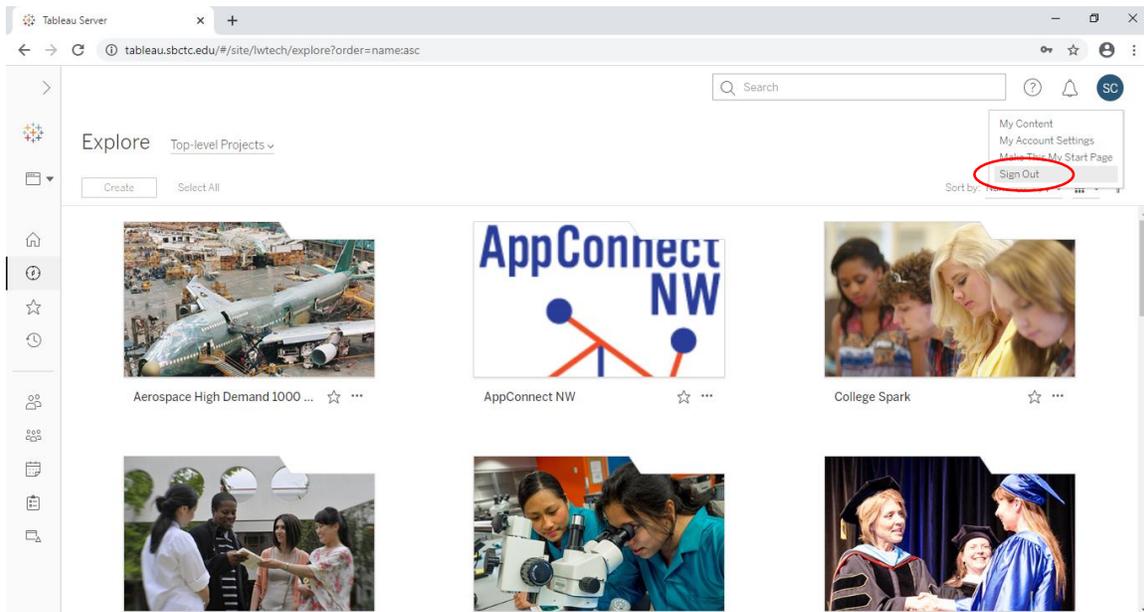


Figure 6

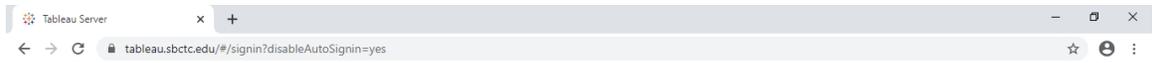


Figure 7