



## CHAPTER 3

# User Guide – Navigating Data Dashboards

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### Periodic Review

Annual or as needed

### Revision History

Department	Required	Name	Date
Research & Grants	<input checked="" type="checkbox"/>	Grayson Court	9/15/2017
Research & Grants	<input checked="" type="checkbox"/>	Grayson Court	10/27/2017
Research & Grants	<input checked="" type="checkbox"/>	Grayson Court	6/15/2018
Research & Grants	<input checked="" type="checkbox"/>	Sarah Chandler	1/14/2020

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**1.0 Scope:** The purpose of this guide is to help a user navigate within 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 the computer use to prevent eye strain!

## 5.0 Procedure – Viewing the Dashboard

5.1. Please see Chapter 2 for detailed instructions on how to navigate to dashboards, including steps needed to access the workbook *Enrollment and Academic Success* (Figure 1).

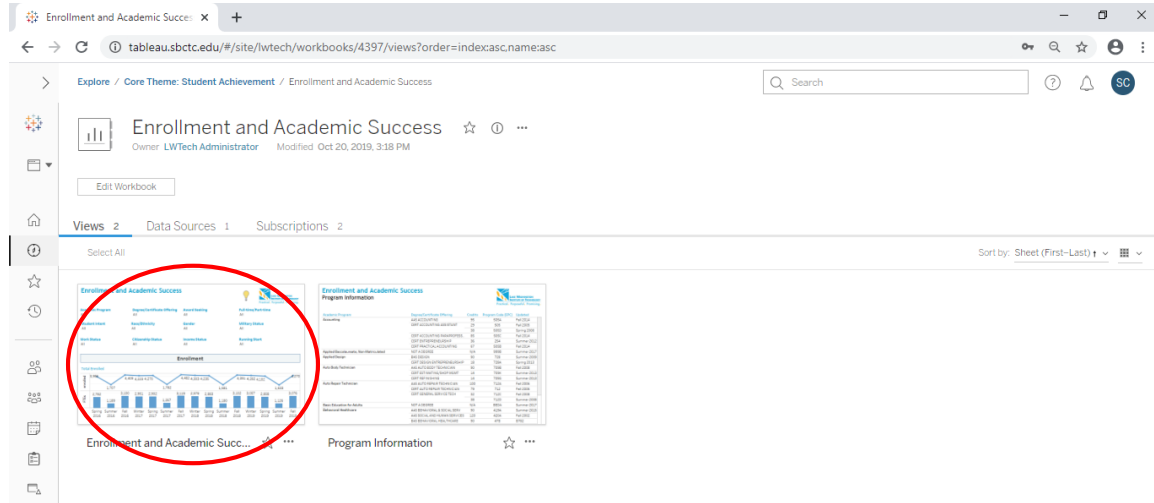
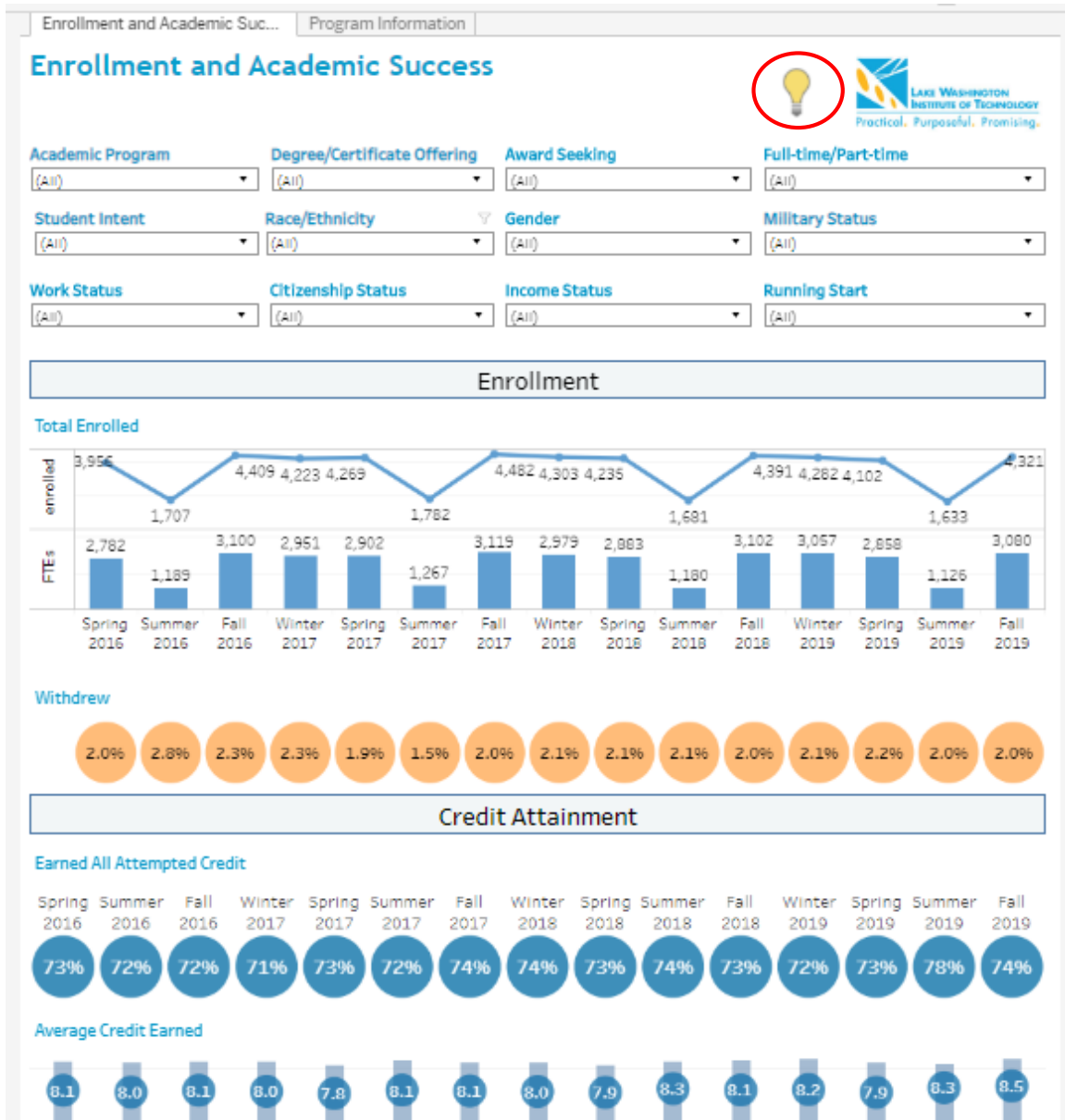


Figure 1

5.2. In the workbook, select the primary dashboard *Enrollment and Academic Success*. Here you will see enrollment trends and student outcomes, including: number of students enrolled, FTEs (full-time equivalents), withdrawal rates, total credit attainment, average credit attainment, percent earned all attempted credit, and earned 2.0 GPA or above. Please see Figure 2 for a sample of what you might see.



**Figure 2**

**5.3.** To learn more about what the data means, hover over the yellow lightbulb in the top, right-hand corner, highlighted in Figure 2.

**5.3.1.** A pop-out image will show on your screen titled “What does the data mean?” providing additional details of the underlying data that you see on the dashboard. Please see Figure 3 for an example of what you might see.

**5.3.1.1.** For example, low-income students are those who received some form of need-based financial assistance.

5.3.1.2. Additional details will also include how student FTEs are calculated.

For instance, the dashboard calculates FTE enrollment as quarterly FTEs based on credits registered divided by 15.

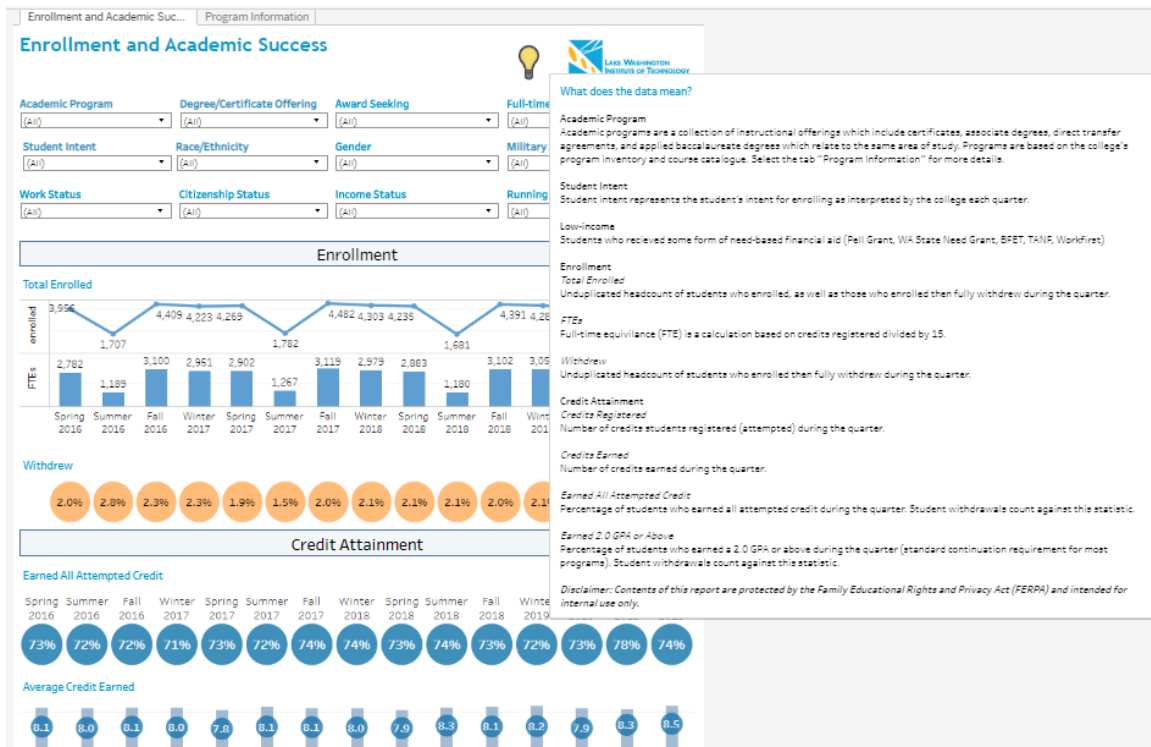


Figure 3

5.4. To view more information about the college's program inventory, select the second tab titled "Program Information". Please see the highlighted tab in Figure 4 for an example.

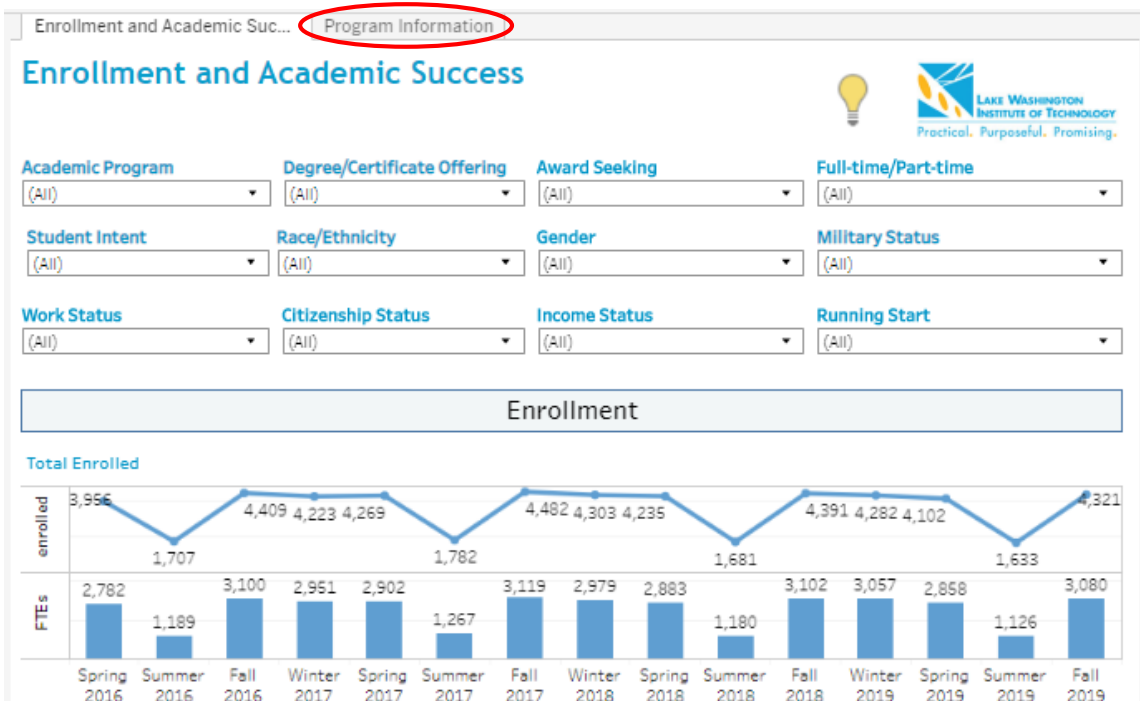


Figure 4

5.5. You will be re-directed to the college’s program inventory titled *Enrollment and Academic Success: Program Information*.

5.5.1. Please see Figure 5 for an example. This dashboard provides detailed information about each academic program offered at the college, including: name of academic program, name of degree or certificate track within the program, credits within the program, the date when the program underwent curriculum revision and was entered into our software management system (*labeled here as ‘Updated’ as it is the earliest record we have in the database*), and the educational program code (EPC) associated with the degree/certificate track.

5.5.1.1. Please note: A program may have been updated since the date given in the dashboard; however, the entry might not have been updated in the database. If you think the date is incorrect, please let Cathy Copeland or Sarah Chandler know. (Please see highlighted area in Figure 5).

Academic Program	Degree/Certificate Offering	Credits	Program Code (EPC)	Updated
Accounting	AAS ACCOUNTING	95	505A	Fall 2014
	CERT ACCOUNTING ASSISTANT	29	505	Fall 2005
		38	505D	Spring 2008
	CERT ACCOUNTING PARAPROFESS..	85	505C	Fall 2014
	CERT ENTREPRENEURSHIP	36	254	Summer 2012
	CERT PRACTICAL ACCOUNTING	67	505B	Fall 2014

Figure 5

5.6. Select the tab “Enrollment and Academic Success” to return to the primary dashboard.

### 6.0 Procedure – Filtering the Dashboard

6.1. In order to learn more about a specific program, select the filter “Academic Program”. Please see Figure 6 for an example.

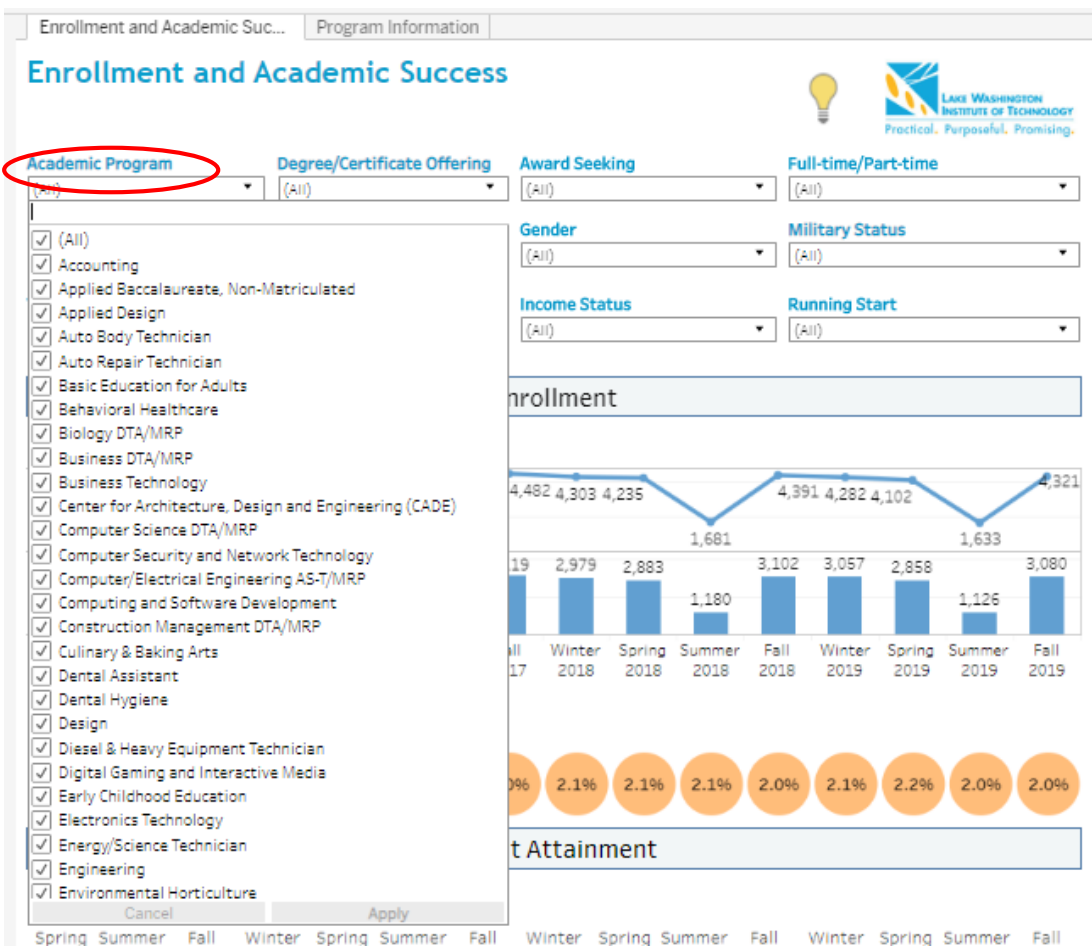
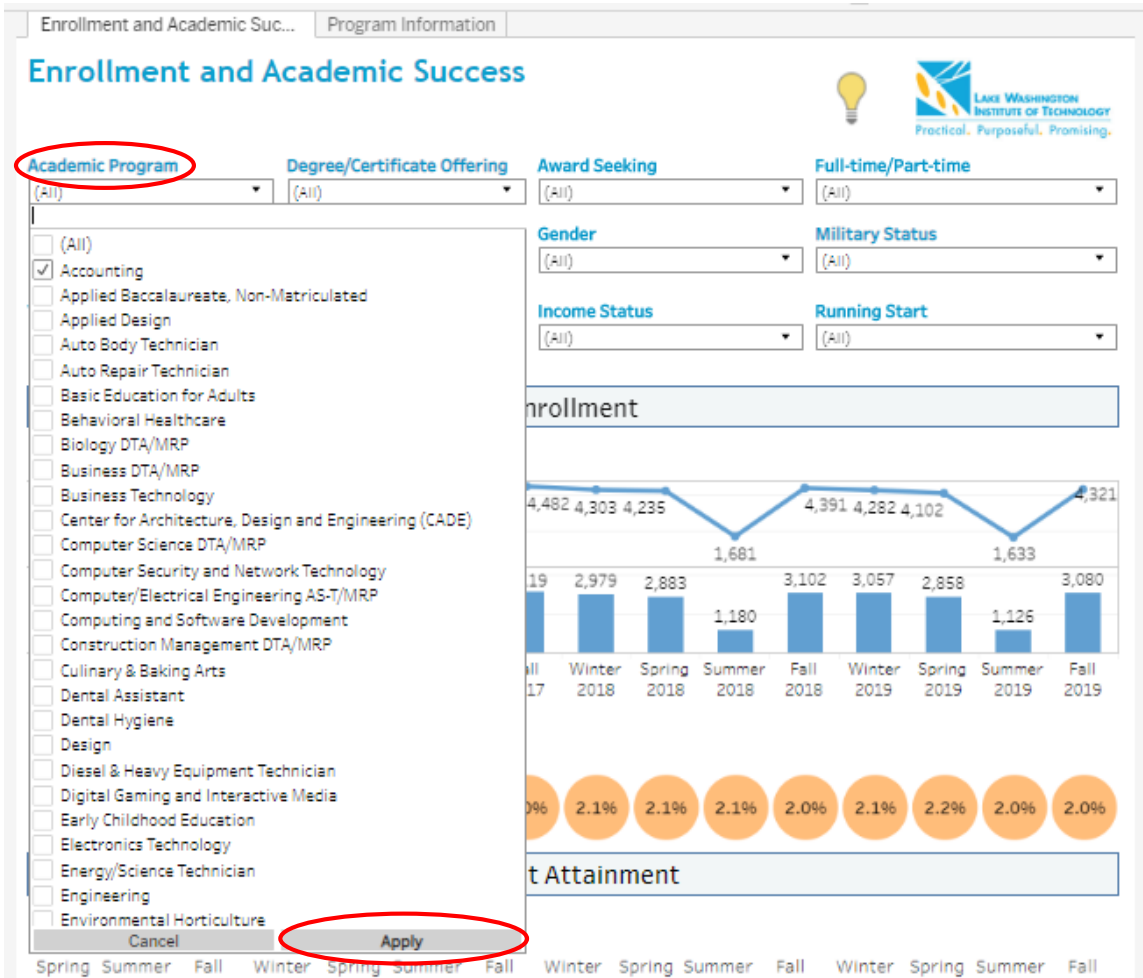


Figure 6

**6.2.** Once you select the filter, you will see all programs offered at the college. Select “All” to remove all programs, select “Accounting”, then select the button “Apply” (See circled images in Figure 7).

**6.2.1.** Click to the side of the dashboard to collapse the drop-down menu.



**Figure 7**

**6.3.** The dashboard will now be updated to reflect students only enrolled within the Accounting program. Please see Figure 8 for an example.

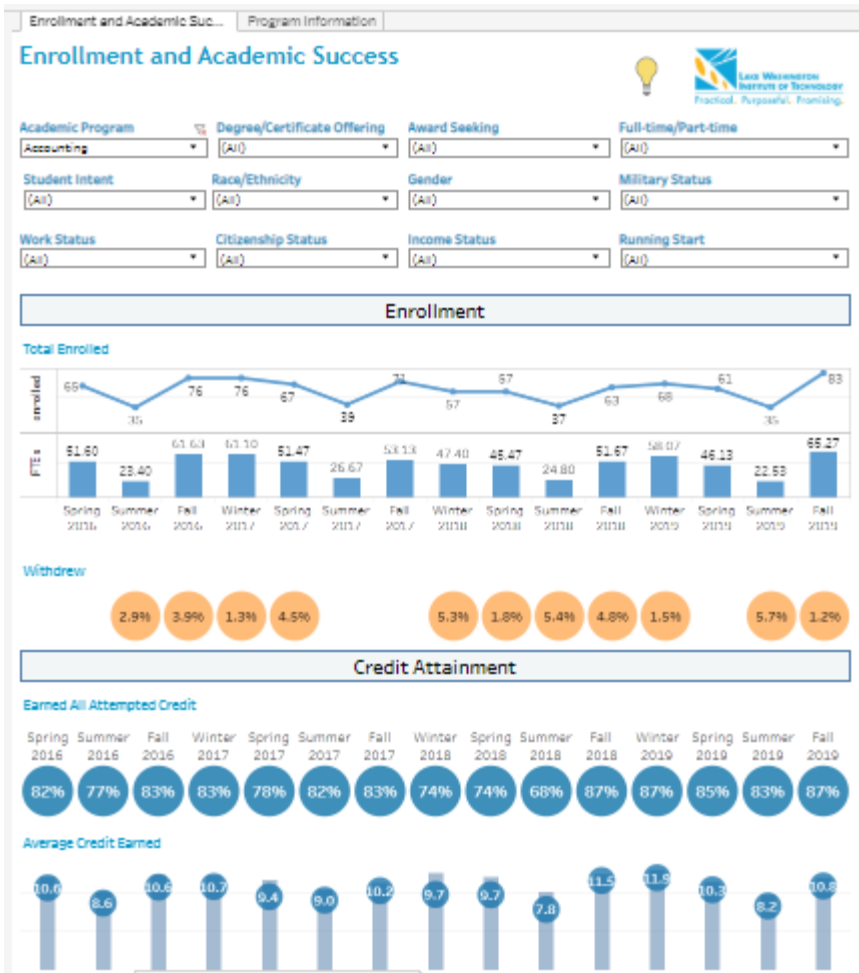


Figure 8

6.4. To refresh the dashboard to its original view, click the back arrow, highlighted in Figure 9 (called “Revert” in Tableau).

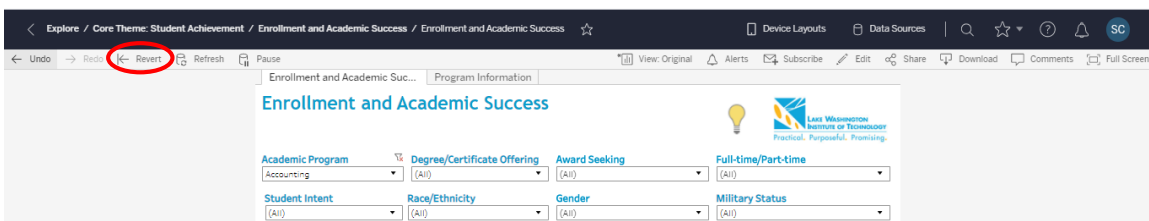
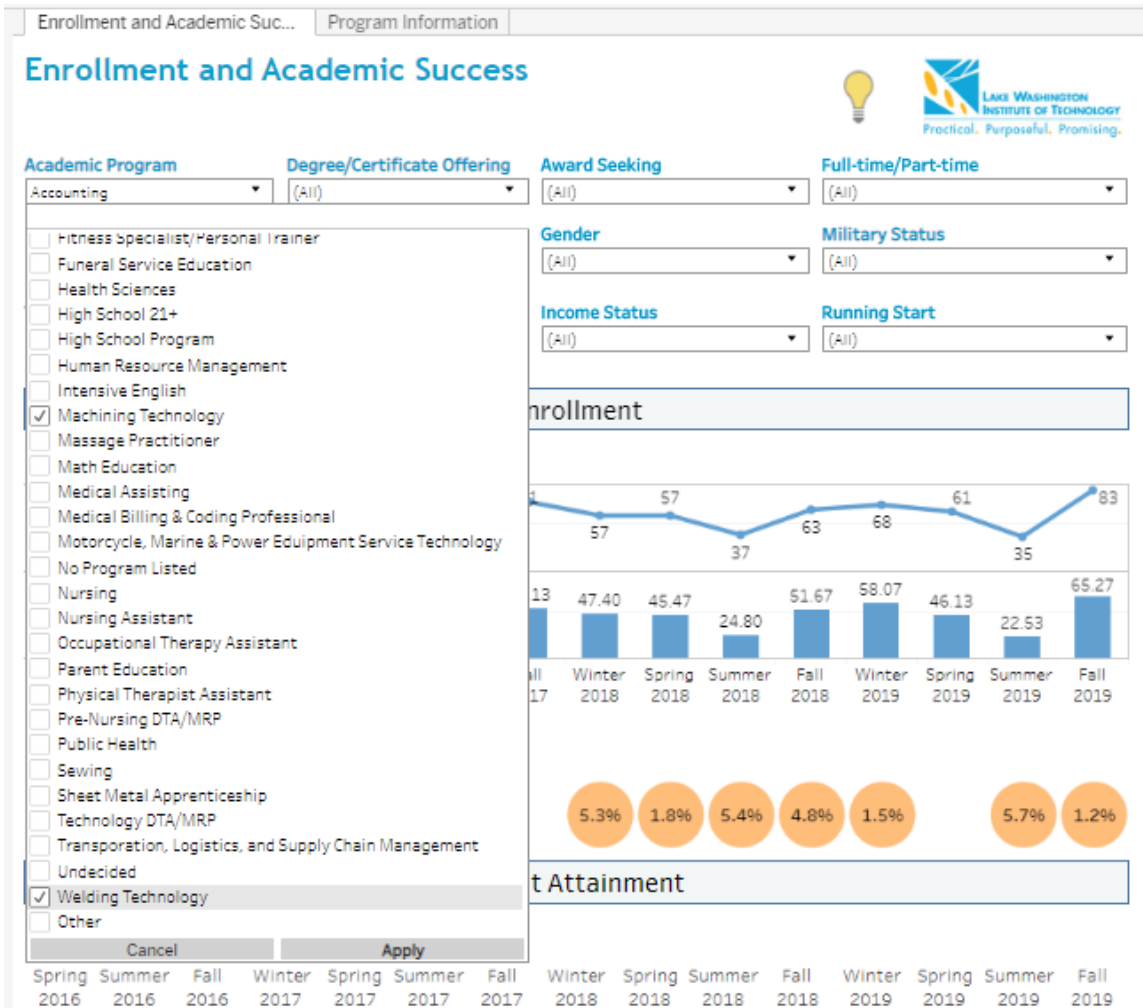


Figure 9

6.5. You can select more than one program at a time as shown Figure 10. The Academic Program will say “Multiple Values” so that you know more than one program is selected.







**Figure 10**

**6.6.** To view only full-time students enrolled within the combination of programs (or single program if you choose), click on the filter “Full-time/Part-time” and select “Full-time enrolled (12+ credits)” (highlighted in Figure 11). The dashboard will change again to reflect only full-time students enrolled in the Machining and Welding programs. Please see Figure 11 for an example. You will notice that the data points for all categories have changed again to reflect the new group of students.

Enrollment and Academic Suc... Program Information

## Enrollment and Academic Success

Practical. Purposeful. Promising.

<b>Academic Program</b> (Multiple values)	<b>Degree/Certificate Offering</b> (All)	<b>Award Seeking</b> (All)	<b>Full-time/Part-time</b> (All) (All)
<b>Student Intent</b> Professional/Technical Progr...	<b>Race/Ethnicity</b> (All)	<b>Gender</b> (All)	Full-time enrolled (12+ credits) Part-time enrolled (<12 credits)
<b>Work Status</b> (All)	<b>Citizenship Status</b> (All)	<b>Income Status</b> (All)	<b>Running Start</b> (All)

Enrollment

**Figure 11**

**6.7.** To interact with the dashboard further, you can hover over graphs and data points to learn more about the data you are viewing.

**6.8.** To return to the original view (all programs with no filters selected), click on the button “Revert” near the top of the dashboard. The dashboard will completely refresh and return to its original view that you first saw.

**6.8.1.** Hint: Selecting “Revert” is a good method to clear your selections and filters to reset the dashboard.

**6.9.** You are now ready to explore new information as the dashboard is reset.

## 7.0 Contacts for troubleshooting

**7.1.** If you have any trouble with this procedure, please contact Cathy Copeland or Sarah Chandler for assistance.

**7.1.1.** Their emails are [cathy.copeland@lwtech.edu](mailto:cathy.copeland@lwtech.edu) and [sarah.chandler@lwtech.edu](mailto:sarah.chandler@lwtech.edu).