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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

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

<table>
<thead>
<tr>
<th>Course Name</th>
<th>Assessment Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Security and Privacy (15 Minutes) - Course</td>
<td>Data Security and Privacy (15 Minutes) - Assessment</td>
</tr>
<tr>
<td>How to Protect Information (95 Minutes) - Course</td>
<td>How to Protect Information (95 Minutes) - Assessment</td>
</tr>
<tr>
<td>Managing Security Information Problems (15 Minutes) - Course</td>
<td>Managing Security Information Problems (15 Minutes) - Assessment</td>
</tr>
<tr>
<td>Federal Tax Information (10 Minutes) - Course</td>
<td>Federal Tax Information (10 Minutes) - Assessment</td>
</tr>
<tr>
<td>Social Security Administration Information (15 Minutes) - Course</td>
<td>Social Security Administration Information (15 Minutes) - Assessment</td>
</tr>
<tr>
<td>Protected Health Information (PHI) (15 Minutes) - Course</td>
<td>Protected Health Information (PHI) (15 Minutes) - Assessment</td>
</tr>
<tr>
<td>Data Protection for Supervisors (10 Minutes) - Course</td>
<td>Data Protection for Supervisors (10 Minutes) - Assessment</td>
</tr>
<tr>
<td>Data Security for County Staff and Assistors (10 Minutes) - Course</td>
<td>Data Security for County Staff and Assistors (10 Minutes) - Assessment</td>
</tr>
<tr>
<td>Data Security for Help Desk and System Administrator (10 Minutes) - Course</td>
<td>Data Security for Help Desk and System Administrator (10 Minutes) - Assessment</td>
</tr>
<tr>
<td>Volunteer (15 Minutes) - Course</td>
<td>Volunteer (15 Minutes) - Assessment</td>
</tr>
</tbody>
</table>

   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 Agencies.pdf]

- 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/](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/](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
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.

![Explore with Top-level Projects menu open]

**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.

*Togglle view mode “Grid”*
*Toggle view mode “List”

<table>
<thead>
<tr>
<th>Type</th>
<th>Name</th>
<th>Views (All-time)</th>
<th>Workbook</th>
<th>Sheet</th>
<th>Project</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>(1) Main Trends</td>
<td>799</td>
<td>General Child Welfare Studies</td>
<td>1</td>
<td>County Data - Child Welfare</td>
</tr>
<tr>
<td>1</td>
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<td>General Child Welfare Studies</td>
<td>2</td>
<td>County Data - Child Welfare</td>
</tr>
<tr>
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<td>(3) Maltreatment R...</td>
<td>472</td>
<td>Federal Measures</td>
<td>1</td>
<td>County Data - Child Welfare</td>
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<tr>
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<td>State Measures</td>
<td>1</td>
<td>County Data - Child Welfare</td>
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<tr>
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<td>407</td>
<td>State Measures</td>
<td>2</td>
<td>County Data - Child Welfare</td>
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<tr>
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<td>General Child Welfare Studies</td>
<td>3</td>
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<tr>
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<td>General Child Welfare Studies</td>
<td>4</td>
<td>County Data - Child Welfare</td>
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<tr>
<td>1</td>
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<td>Federal Measures</td>
<td>2</td>
<td>County Data - Child Welfare</td>
</tr>
<tr>
<td>1</td>
<td>(3) Foster Care R...</td>
<td>268</td>
<td>Federal Measures</td>
<td>3</td>
<td>County Data - Child Welfare</td>
</tr>
</tbody>
</table>

*Sort by: Name (A-Z)
Using Dashboards

### General Child Welfare Statistics

**Summary data for Minnesota through the third week of June 2019**

**Choose agency**: Minnesota  
**Choose data point**: Number of Child Protection Reports Received / Screened

- **(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
- **(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

**Minneapolis trends over time**

Number of child protection reports received / screened. Shown by screening decision.

**Click legend to highlight chart**

- Screened-out
- Screened-in

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- **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.
To share this view with colleagues, click on the ‘Share’ button and copy and paste the link into an email.

**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.

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
*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
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.

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.

* DRAFT *

**General Child Welfare Statistics**

Summary data for **Minnesota** through the third week of June 2019

**Choose agency**
- Minnesota

**Choose data point**
- Number of Child Protection

**Total vs. group breakdown**
- Group Breakdown
- Total

**Minnesota trends over time**

Number of child protection reports received/screened

Shown by screening decision

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**Account Settings Page**

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

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Here you can

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**My Account Settings**

- Make This My Start Page
- Sign Out

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