



## Visualizations in Tableau Server – Getting Started Quick Guide

This guide highlights key steps and features to help users get started with their access and preview of OSPI's data in a new Education Data System (EDS) application called Tableau Server. Topics include:

- Login/Requesting Access
- Projects Layout
- Navigating and Downloading Data

### Login

To access the visualizations and data a user must have an EDS account and be assigned the proper user role. If you do not have an EDS account, go to OSPI's Education Data System ([EDS](#)) and choose Create an Account. It is recommended that old accounts are updated with new contact information to avoid the existence and confusion of numerous accounts. For users that support multiple districts, a single account can be linked to numerous districts for easy access.

### Request Access

To request access to the visualizations and data in the Tableau Server application, users should contact the District Data Security Manager (DDSM) of the district they are working with. Each district manages their own security and may have their own unique requirements/process for getting access. This may include but is not limited to, data sharing agreements and security training. Click here for a list of all [DDSMs](#).

Note: Tableau user roles do not provide immediate access once assigned. Users will typically have access the next day.



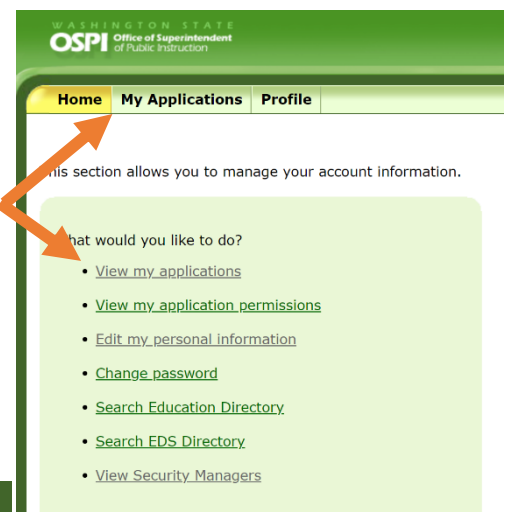
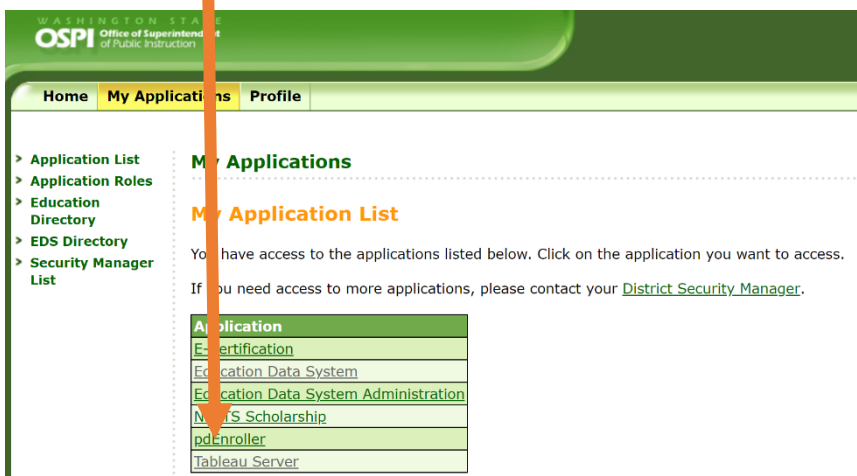
The Tableau Server application contains three security roles with varying levels of access:

- **Tableau SecureDataPortal-Educator Interactor** – District or School Reports focused around the Educator Equity Data Collection Tool and other Teacher/Staff systems.
- **Tableau SecureDataPortal-Finance Interactor** – District, or School Reports focused around school financial information, including but not limited to School Apportionment & Financial Systems (SAFS).
- **Tableau SecureDataPortal-Student Interactor** – District or School Reports focused around Comprehensive Education Data and Research System (CEDARS) and its related sub-systems.

Users needing access to the LAP Data Dashboard should request Tableau SecureDataPortal – Student Interactor.

## Navigating to Tableau Server

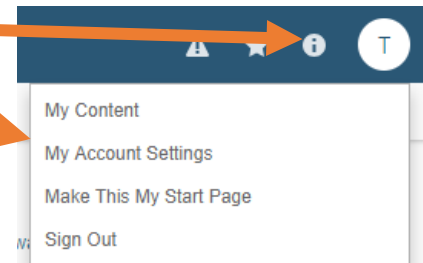
Upon signing into EDS, users can navigate to the Tableau Server by going to **"My Applications"**. Under My Applications, select **"Tableau Server"**.





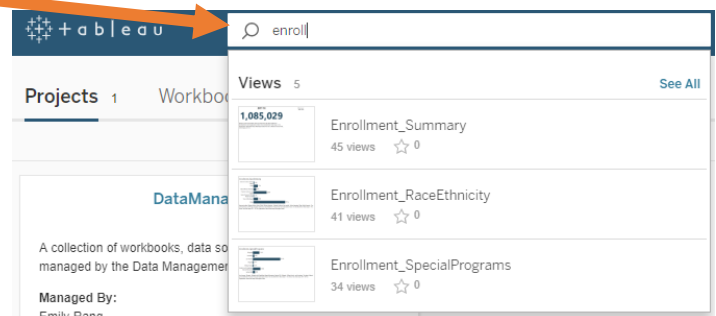
## My Account Settings

Account Settings should not be managed or changed. This section is highlighted because it is **critical** that users do not change their Tableau passwords for any reason. Each user can manage their EDS password to protect their access to Tableau Server for previewing.

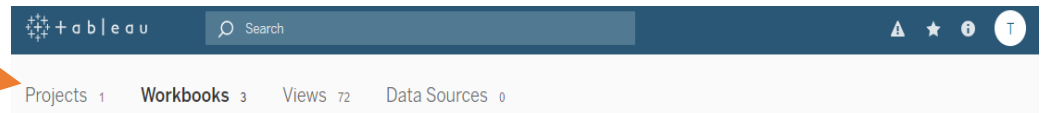


## Search Tool

The Search tool is able to find content based on text found in the project name, title, view owner, or other metadata. In the example below, by typing "enroll" the Search tool was able to recommend various enrollment reports.



## Navigation Menu



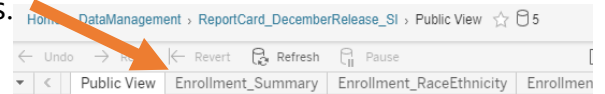
The Navigation Menu will change based on the user's location and access. From the Starting Page there are four sections:

- **Projects** – Parent folder that contains different bodies of work. Currently these are split into three data sets that align with EDS Security Roles:
  - **Educator** – Reports focused around the Educator Equity Data Collection Tool and other Teacher/Staff systems.
  - **Finance** – Reports focused around school financial information, including but not limited to SAFS.
  - **Student** – Reports focused around CEDARS and its related sub-systems.
- **Workbooks** – Exist within a Project, containing their own Views and Data Sources.
- **Views** – Reports or data displays.

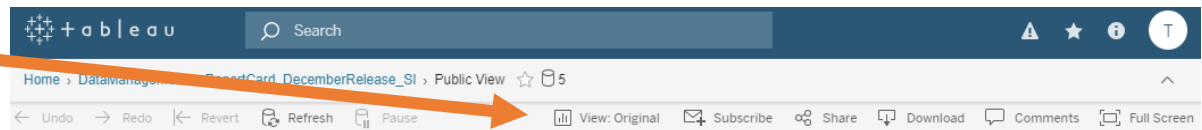


- **Data Sources** – Records that indicate where the data populating the various Views came from and when they were last updated.

As the user navigates to a specific View or report, the Navigation Menu changes to display all the views within the Workbook of the selected View. This provides quick access to similar or related data displays.

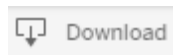


## Toolbar



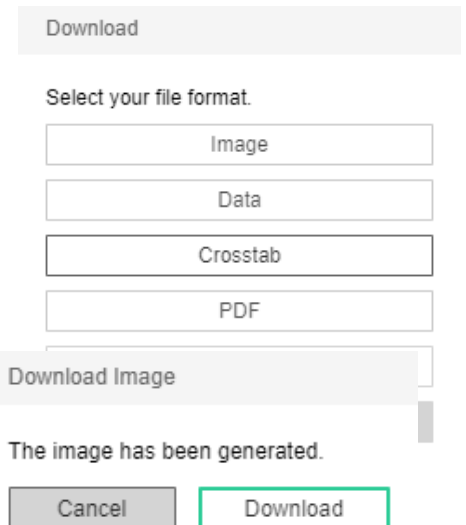
The toolbar appears once the user navigates to a specific View or report. These options aid the user in sharing and communicating their findings. This section highlights the Share and Download features.

## Download



Users can download their favorite data displays in the format that best meets their needs. The availability of these file formats depend on the data display. Please see the file format definitions and examples below:

- **Image** – This option produces a (.png) photo file. Recommended for adding data displays to documents or presentations.





## Office of Superintendent of Public Instruction Chris Reykdal, State Superintendent

All students prepared  
for post-secondary pathways,  
careers, & civic engagement.

- **Data** – This option produces a Tableau pop-up window containing the raw data. Notice that some of the columns are suppressed and can be added to this display. Additionally, this data can be downloaded to (.csv) text file. These files can be large and may take some time to download.

Summary **Full data**

Showing first 200 rows.  
[Download all rows as a text file](#)

☐ Show all columns

AggregationLevel ProficiencyAnnual	Display Level	Districtname	Dynamic Student Filter	Grade Level	Organization Name	School Name	Schoolyear	Test Admin
ExcludeFromDistrict	Level 1	Federal Way School District	ExcludeFromDistrict	8th Grade	Washington State	Internet Academy	2017-18	Smarter Balanced
ExcludeFromDistrict	Level 1	Quilcene School District	ExcludeFromDistrict	3rd Grade	Washington State	Partnership for Excellence in Alternative Remote Learning	2017-18	Smarter Balanced

- **Crosstab** – This option produces a (.csv) text file that can be opened with and saved as an Excel Workbook. Depending on the Excel version, this file will automatically open through Excel.  
*Recommended:* when saving this file, change the Save As to an Excel Workbook.

	A	B	C	D	E	F	G
1					2017-18	2017-18	2017-18
2					English Lan Math		Science
3	Smarter Ba	3rd Grade	55.50% Assessment		84,407		
4	Smarter Ba	3rd Grade	55.50% Assessment		46,898		
5	Smarter Ba	3rd Grade	55.50% Percent Pa		55.60%		

- **PDF** – This option produces a (.pdf) file. There are some options for the user to customize the download layout such as, Scaling, Paper Size, and Orientation. This format is recommended for printing copies of the data display.

Download PDF

Include  
This Story

Scaling  
Automatic

Paper Size  
Letter

Orientation  
Portrait

Cancel Create PDF