



Report Card 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 redesigned Report Card visualizations and data in a new EDS application called Tableau Server. Topics include:

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

Login

To access the Report Card 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.

Sign In Create an Account

eds System Sign In

Username

Password

Login

Forgot your [username](#) or password?

Request Access

To request access to the Report Card visualizations and data in the Tableau Server application, users should contact the 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:

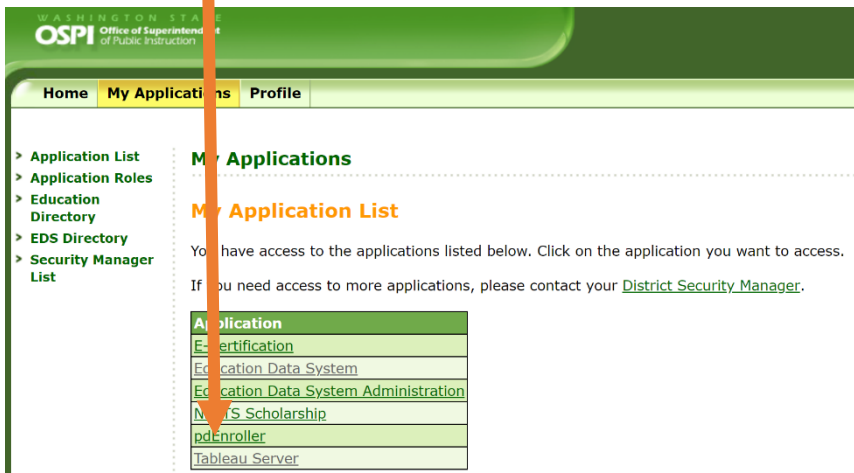
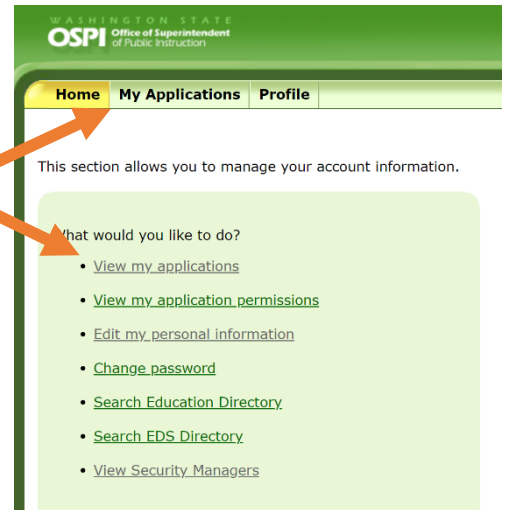


- **Tableau SecureDataPortal-Educator Interactor** – District or School Reports focused around the Educator Equity Data Collection Tool and other Teacher/Staff systems.
- **Tableau SecureDataPortal-Finance Interactor** District, or School Reports focused around school financial information, including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

Users needing access to all three areas of Educator, Finance and Student will need all three user roles assigned to their account.

Navigating to Tableau Server for Report Card

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





Overview

The Start Page will default to this screen. Users will only see all three workbooks if they have all three Tableau User Roles assigned to their account.

Annotations for the Tableau Start Page:

- Site Menu: Points to the Tableau logo and search bar.
- Navigation Menu: Points to the tabs for Projects, Workbooks, Views, and Data Sources.
- Display Options: Points to the 'Sort by' dropdown menu.

The screenshot shows three workbooks: 'ReportCard_DecemberRelease_SI' (638 views), 'Report Card version 1_Finance' (70 views), and 'Report Card - Educator Measures...' (9 views).

Annotations for the Tableau Public View:

- Breadcrumbs: Points to the breadcrumb trail: Home > DataManagement > ReportCard_DecemberRelease_SI > Public View.
- Tool Bar: Points to the toolbar containing Undo, Redo, Revert, Refresh, Pause, View: Original, Subscribe, Share, Download, Comments, and Full Screen.
- Data Display Options: Points to the view selection buttons: Summary, Trend, By Grade, and Detail.

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 Report Card previewing.

Annotations for the Tableau user profile menu:

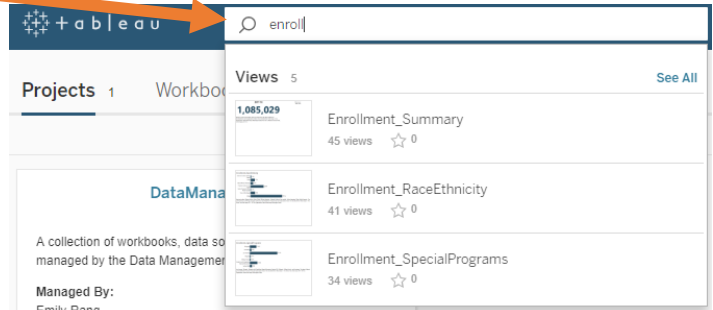
- My Account Settings: Points to the 'My Account Settings' option in the dropdown menu.

The menu also includes 'My Content', 'Make This My Start Page', and 'Sign Out'.

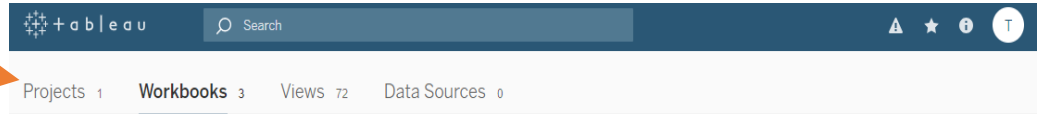


Search Tool

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.



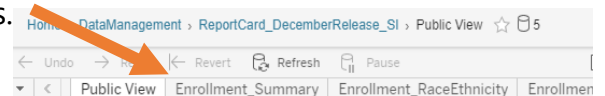
Navigation Menu



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

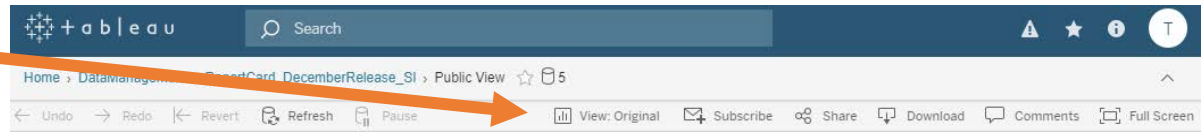
- **Projects** – Parent folder that contains different bodies of work. Currently these are split into three data sets that align with EDS Security Roles:
 - **Educator** – Reports focused around the Educator Equity Data Collection Tool and other Teacher/Staff systems.
 - **Finance** – Reports focused 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

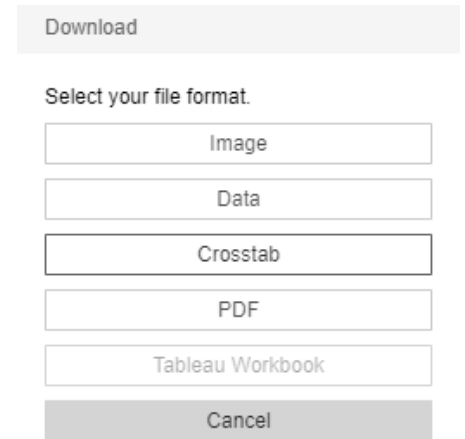


The toolbar appears once the user navigates to a specific View or report. These options aid the user in sharing and communicating their findings. This section highlights the Share and Download features.

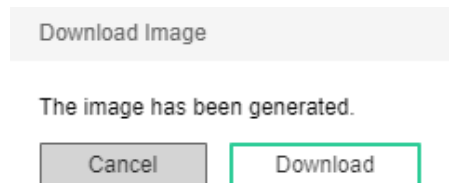
Download



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. For example, statewide data displays will generally only allow the Image and PDF formats to protect student level data. 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.



- **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%	Assessmen	84,407		
4	Smarter Ba	3rd Grade	55.50%	Assessmen	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

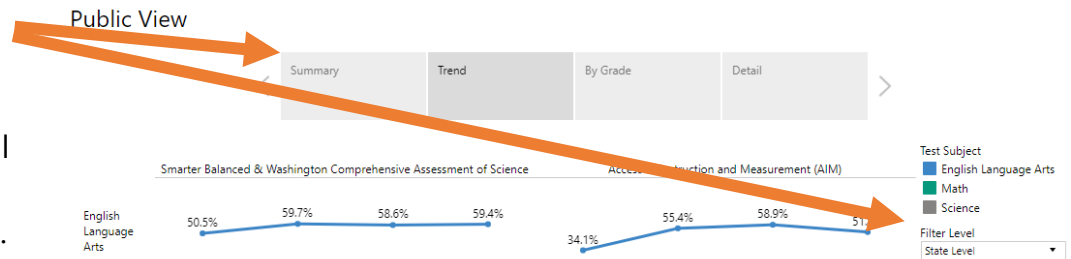
Cancel Create PDF

Data Display Options

Based on the report, additional display options may be available.

Two common Data Display Options include:

- Drill down options, such as the Summary, Trend, By Grade, and Detail.
- Filter options, such as State Level, District Level, or School level.





Support

For general questions about Report Card please contact our Report Card Re-design Team at ReportCardReDesign@k12.wa.us or Katie Weaver Randall, Director, Student Information (360) 725-6356

For specific questions about data, please contact our subject matter experts:

Student – AchievementData@k12.wa.us

Educator – Kaori.Strunk@k12.wa.us

Financial – Vicky.Dyer@k12.wa.us

For data use questions, please contact OSPI's System and School Improvement Office. Travis.Wentworth@k12.wa.us