

Your Tableau site—where analytics and your organization meet

Harness your data. Discover opportunities. Elevate your insights.

Start Exploring



Tableau Server Orientation for Local Agencies

Continuous Quality Improvement (CQI)
Research & Evaluation Unit

Purpose of Presentation

We hope this will support agencies in:

- Understanding Tableau and what it can be used for
- Supporting staff in setting up and maintaining access to Tableau
- Getting access to training & learning resources
- Providing a forum to get questions answered

Poll

- How many people get questions from staff on finding data, locating reports, or accessing Tableau?

What is Tableau?

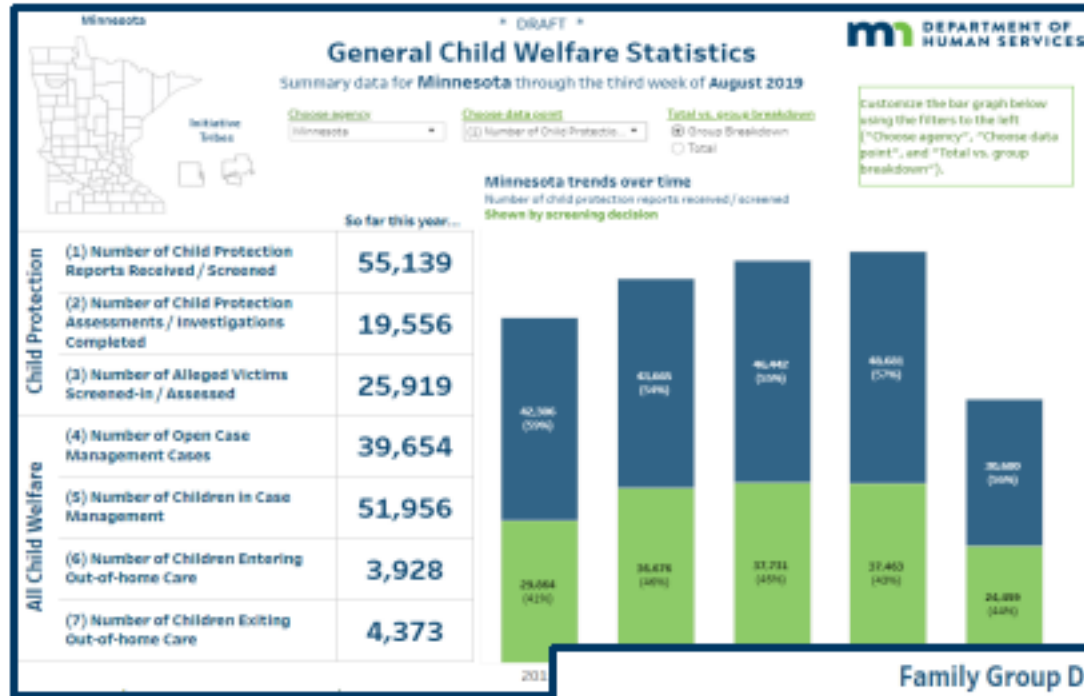
- A data visualization tool that allows the DHS Research & Evaluation team to build dashboards that can be shared in one of two ways:
 - [Minnesota Child Welfare Data Dashboard](#)
 - [Tableau Server](#)
 - Internal DHS & Local Agency Sites
 - Tableau Server Demo Video
 - <https://www.youtube.com/watch?v=2mCG4UifLt4>

Why Use Tableau?

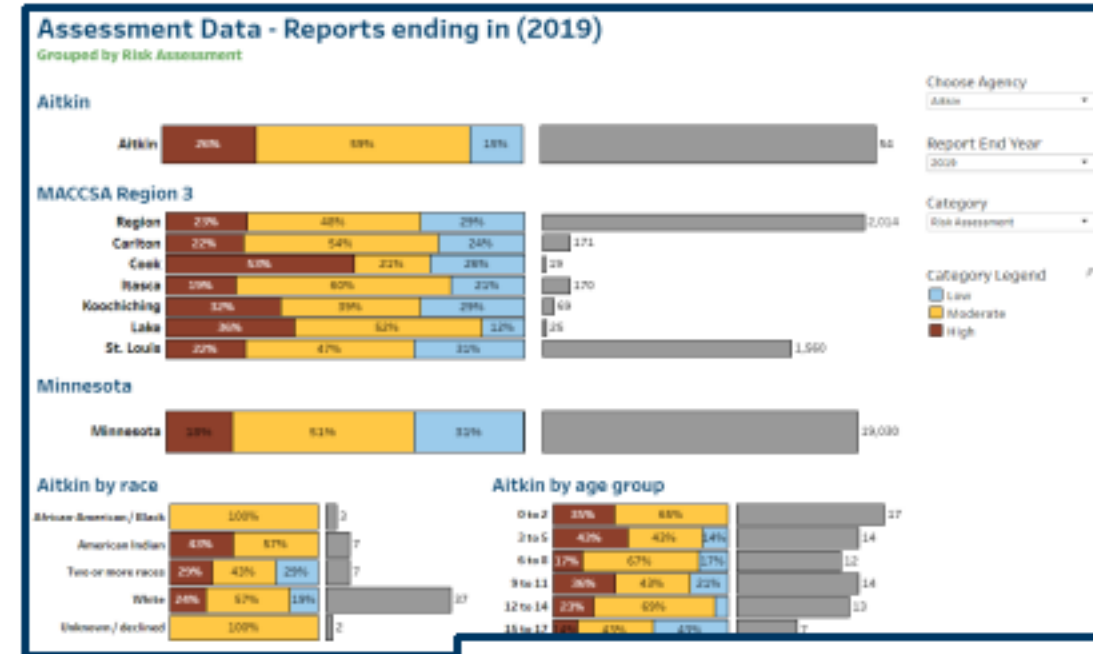
Have staff in your agency ever wanted to:

- See the case level details related to state and federal performance measures on the Minnesota Child Welfare Data Dashboard?
- Present data visuals in local agency board meetings?
- Compare your data to other agencies across the State?
- View trend lines with the ability to disaggregate by a variety of categories?
- Gather data for their grant applications?

Examples of Data Currently Available on Tableau

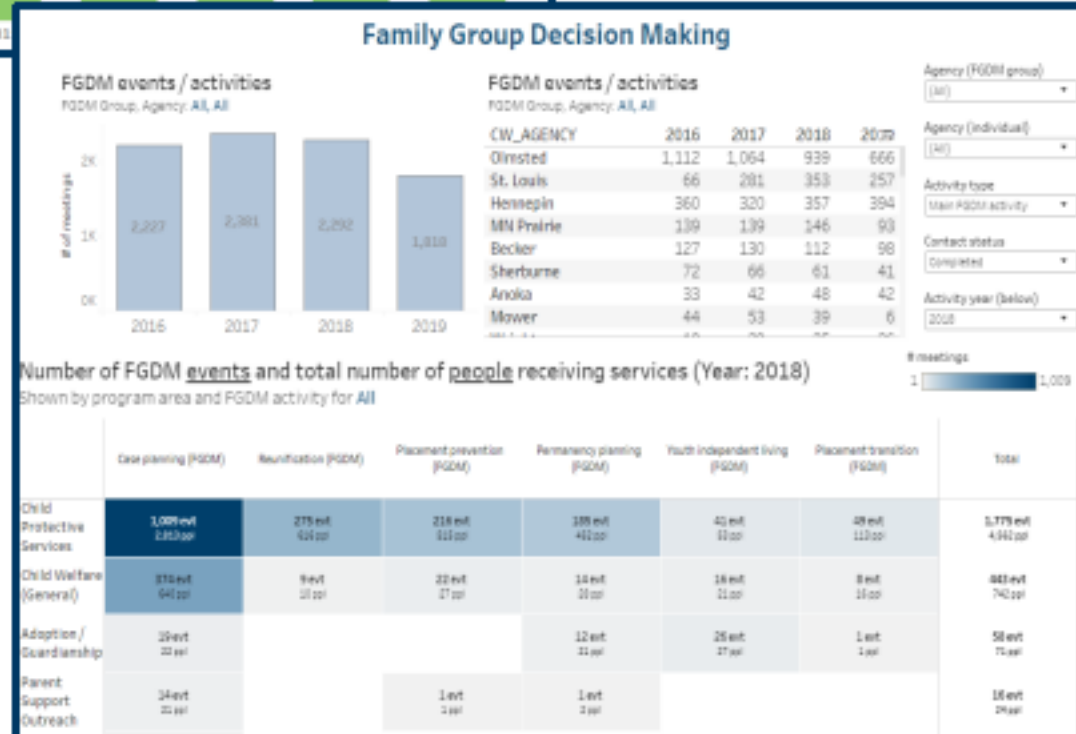


General Child Welfare Statistics

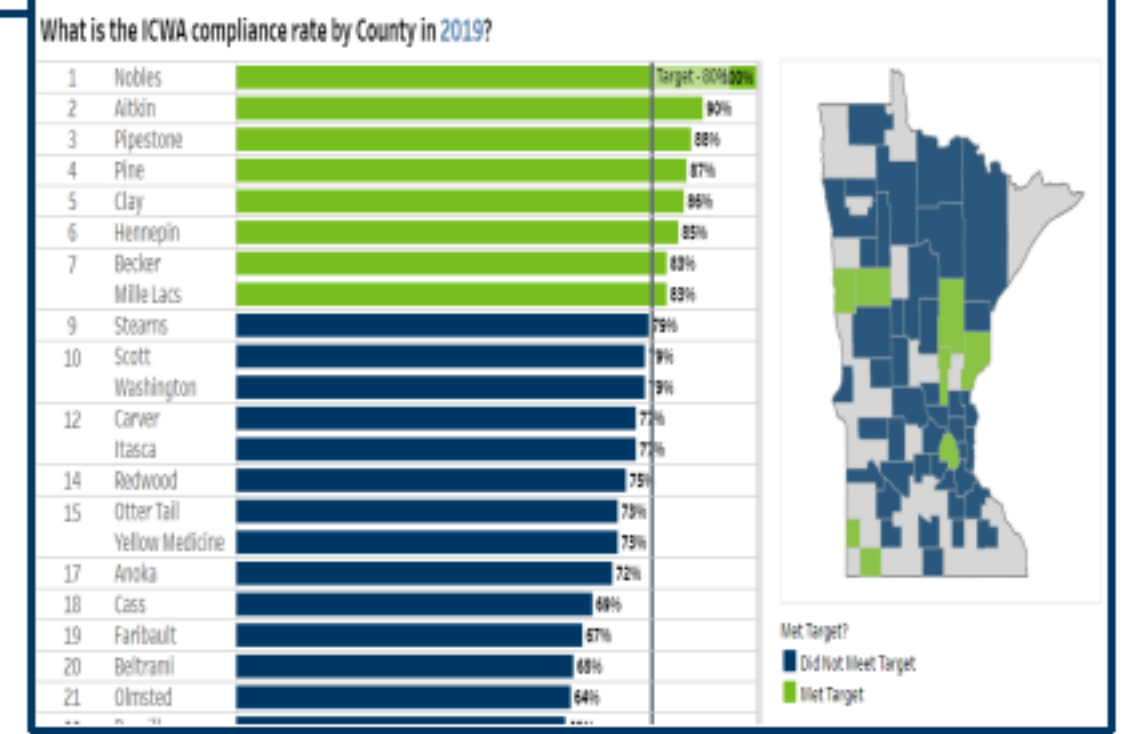


Regional Technical Assistance

Family Group Decision Making



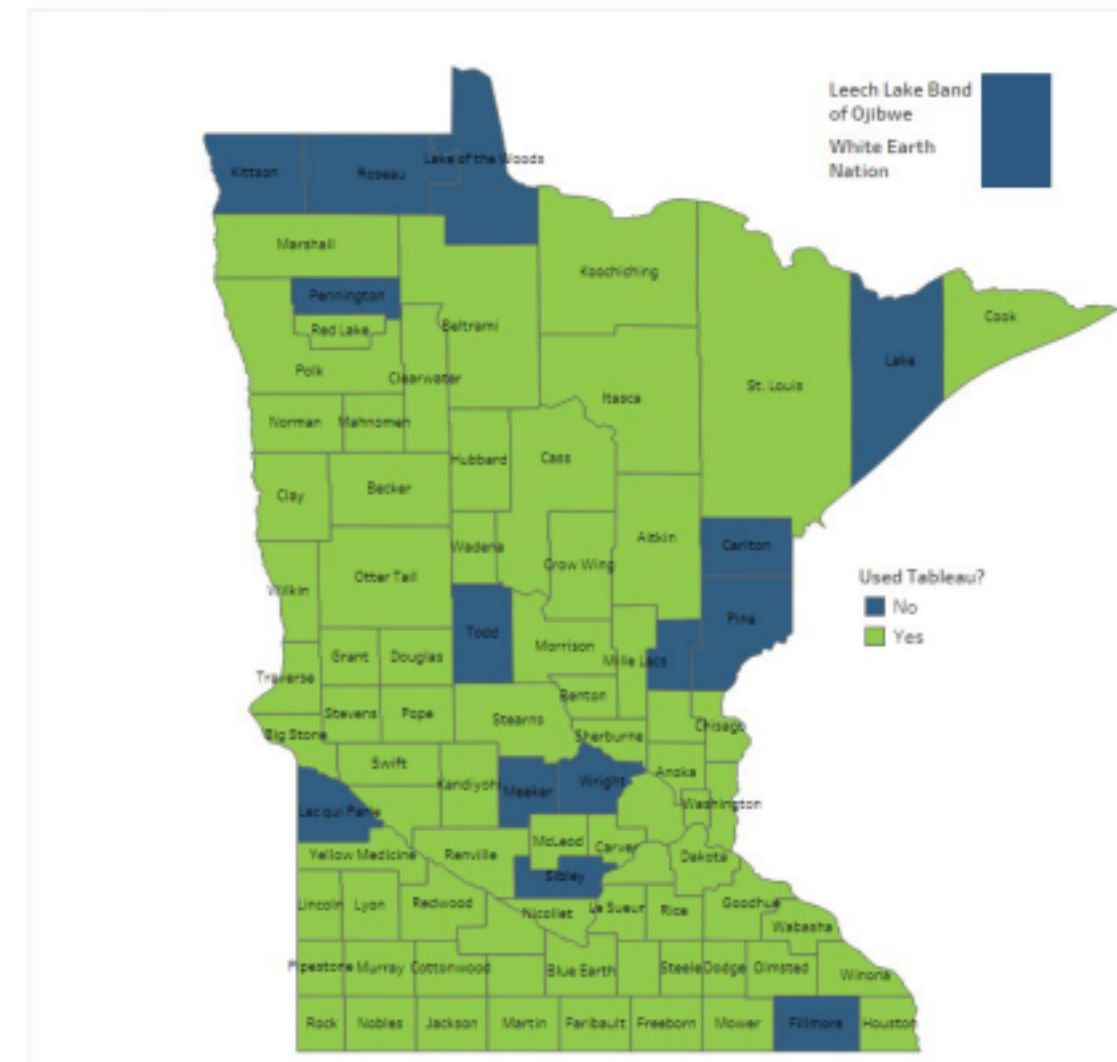
ICWA/MIFPA Case Review



Implementation Background

- We sent out an initial communication to supervisors/directors in September of 2018.
- The majority of agencies have now logged in at least once, with a smaller number being frequent users.

Which agencies have used Tableau?



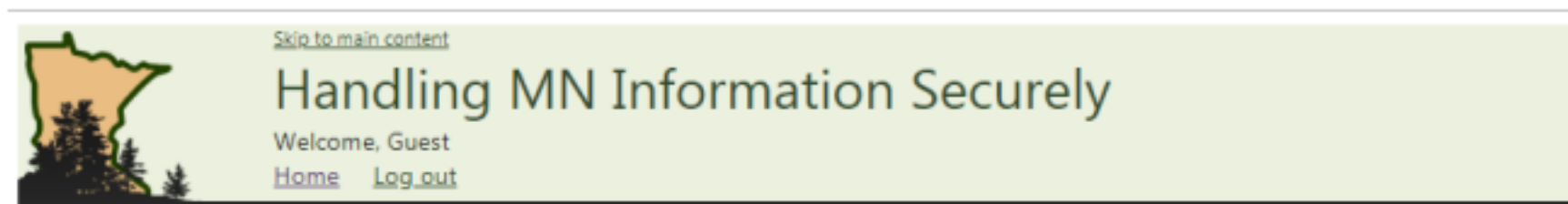
We want to acknowledge and take accountability for the rollout process not being the smoothest. We're doing our best to try and resolve these issues. The completion of agency SSIS centralization should help to make the process more streamlined moving forward.

Knowledge Checkpoint

- Does anybody have questions about what the Repository is and how SSIS data is sent from the local agencies to the State?

Prior to setting up users for Tableau

- Users should have completed DHS data privacy training
 - <https://data-securitytraining.dhs.mn.gov>



Home

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

Course Name	Assessment Link
Data Security and Privacy (15 Minutes) - Course	Data Security and Privacy (15 Minutes) - Assessment
How to Protect Information (35 Minutes) - Course	How to Protect Information (35 Minutes) - Assessment
Managing Security Information Problems (15 Minutes) - Course	Managing Security Information Problems (15 Minutes) - Assessment
Federal Tax Information (10 Minutes) - Course	Federal Tax Information (10 Minutes) - Assessment
Social Security Administration Information (15 Minutes) - Course	Social Security Administration Information (15 Minutes) - Assessment
Protected Health Information (PHI) (15 Minutes) - Course	Protected Health Information (PHI) (15 Minutes) - Assessment
Data Protection for Supervisors (10 Minutes) - Course	Data Protection for Supervisors (10 Minutes) - Assessment
Data Security for County Staff and Assistors (10 Minutes) - Course	Data Security for County Staff and Assistors (10 Minutes) - Assessment
Data Security for Help Desk and System Administrator (10 Minutes) - Course	Data Security for Help Desk and System Administrator (10 Minutes) - Assessment
Volunteer (15 Minutes) - Course	Volunteer (15 Minutes) - Assessment

Data Security Considerations

- We are currently making summary data available to all users. For sensitive identifying information (i.e. name, date of birth, etc.), we are restricting access to within your own agency.
- Security is not set up in the same way as SSIS so if you have concerns about staff accessing certain types of data, please reach out to us prior to setting them up for Tableau.

Tableau User Types

- Existing & New SSIS users (Supervisors, Staff, etc.)
 - For these users you will configure their accounts for Tableau in SSIS Admin using the process on the next slide.
 - Their passwords will be managed through SSIS and will be the same for Tableau
- Non-SSIS users (Directors, etc.)
 - For these users, we will be creating SSIS accounts with the checkbox enabled for Tableau, but they won't be actively logging into SSIS to reset their passwords so their password will be the temporary password

Initial Setup - Setting up existing SSIS users for Tableau access

- 1) Log on to SSIS Admin and select Lists from the Windows toolbar.
- 2) Select User Search.
- 3) Enter User First name and/or Last name.
- 4) Click Search.
- 5) Click Credentials to grant access to Tableau through Active Directory.
 - **Note:** Tableau uses Active Directory to manage user access. Active Directory is linked through SSIS and is designed so agencies can create user accounts without contacting the state for assistance .
 - **Important:** Ensure the Agency Name and Owning Agency matches. If a different agency fills in the Owning Agency field, the SSIS User ID chosen for this user is a duplicate. Click in the SSIS User ID field and clear out the data and tab out of the field. Enter a new SSIS User ID and tab out of the field again. Repeat this until the Agency Name and Owning Agency match. There is an option in the Action Menu to Suggest User IDs, if needed.
- 6) Click in the box to place a checkmark for Tableau Access
- 7) The user will be synced overnight to Tableau



Adobe Acrobat
Document

Initial Setup - Setting up new users for Tableau access – Regular SSIS Users

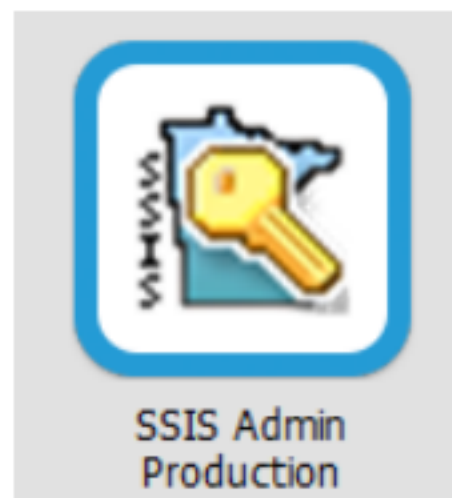
- 1) Complete regular steps you would do to set up a user for SSIS
- 2) Additionally, perform the steps specific to Tableau listed in the last slide to click on the Tableau checkbox in “Credentials”
- 3) If the Active Directory Logon was just created, a password reset email must be sent
- 4) Access Action and select Reset Password to send a secure email to the user containing a password to access SSIS
- 5) The temporary password will expire once the user logs into SSIS and changes it
- 6) After the user changes their password in SSIS, the new password will work in Tableau, as well as Horizon/Citrix

Initial Setup - Setting up new users for Tableau access – Non-SSIS Users

- 1) Perform basic setup required to save the new user.
- 2) After clicking on Credentials, only select the “Tableau Access” checkbox.
- 3) If the Active Directory Logon was just created, a password reset email must be sent
- 4) Access Action and select Reset Password to send a secure email to the user containing a password to access SSIS
- 5) Since the user won't be logging into SSIS to change the password, the temporary password will remain their password for Tableau. This password will expire every 90 days since they won't be accessing SSIS to reset it monthly, so these users will need to reach out to their agency admins/mentors to reset their password and provide a new temporary password.

After Initial Setup - Process to sync SSIS credentials to Tableau after initial setup

- 1) After the users are created or modified to have the Tableau checkbox selected under Credentials, those users will get picked up by the nightly Tableau sync process (occurs at midnight) to add the users to Tableau.
 - **Until this occurs, users will not be able to log in to Tableau, so make sure to wait until the next day to have users log in.**



SSIS Admin

A screenshot of the Tableau Groups/Users interface. The left sidebar shows navigation options: Home, Explore, Favorites, Recents, Users, and Groups. The main area displays a table of groups with columns for Name, Domain, Users, and Minimum Site Role. The table lists several groups, including 'All Users' and several 'HIS_App_Tableau_...' groups.

Name	Domain	Users	Minimum Site Role
<input type="checkbox"/> ALL All Users	local	553	
<input type="checkbox"/> HIS_App_Tableau_Akita_int	county-ssis.co.dhs	2	Explorer
<input type="checkbox"/> HIS_App_Tableau_Anoka_int	county-ssis.co.dhs	5	Explorer
<input type="checkbox"/> HIS_App_Tableau_Decatur_int	county-ssis.co.dhs	3	Explorer
<input type="checkbox"/> HIS_App_Tableau_Bethel_int	county-ssis.co.dhs	2	Explorer
<input type="checkbox"/> HIS_App_Tableau_Denton_int	county-ssis.co.dhs	5	Explorer

Tableau Groups/Users

Users logging in to Tableau the next day

- 1) Navigate to the following link to access Tableau - <https://viz.portal.mn.gov/>
- 2) Enter the credentials below to login:
 - User – The user ids to log into Tableau are the SSIS user id prefaced by “county-ssis\
 - Ex. County-ssis\RDB
 - **NOTE: Actually the word county, not your agency name**
 - Password
 - For regular SSIS users – Same as SSIS password
 - For non-SSIS users – Latest temporary password received



This system is the property of the State of Minnesota. Use of this system without appropriate authority, or in excess of authority, may result in disciplinary action, criminal sanctions and/or other appropriate action. By continuing to use this system, you are representing yourself as an authorized user.

Any activity on this system may be monitored or accessed by the State of Minnesota or other authorized officials at any time. This includes any data created or stored using this system. All such data is subject to the Minnesota Government Data Practices Act. Any identified evidence of possible criminal activity will be provided to appropriate law enforcement agencies.

Report suspected violations and unauthorized use to ITS at 651-431-2100 or (Toll Free) 877-767-4647.

The Minnesota Department of Human Services is committed to ensuring accessibility to all users, including people with disabilities. New and updated workbooks and views produced by this system must be accessible and meet the State of Minnesota technology accessibility standard. The standard incorporates the Web Accessibility Guidelines 2.0 and Section 508 of the Rehabilitation Act of 1973. <http://mn.gov/mnit/programs/policies/accessibility/>.

Sign In →

Ongoing Password Maintenance

- Regular SSIS Users
 - Passwords will always be the same as it is for SSIS
- Non-SSIS Users
 - After initial setup these users will have received a temporary password that will be their Tableau password since they wouldn't have gone into SSIS to change it
 - After 90 days Active Directory will disable this password so the users won't be able to log in to Tableau. Users would then need to send an email to their agency admins/mentors to reset their password, and they would need to use the new temporary password for Tableau. This will require them to always remember the latest temporary password for Tableau use.
 - **Question for the group: What do you think is the best approach to make life easier for these users?**

Tableau Roadmap

Initial Plan

- Setup access for supervisors / directors
- Provide case level details for the federal and state performance measures

Current Work

- Onboarding new users
- Building a variety of dashboards covering different topics
- Using the dashboards as part of Regional Technical Assistance

Long-Term

- Real-time data and dashboards
- Transitioning of internal dashboards to agency Tableau site
- Region/Agency specific dashboard requests

What training/documentation is currently available?

- Tableau Server User Guide
- Tableau Server Training Video
- Agency Admin Guide for setting up users for Tableau

For access to any of these resources please contact dhs.csp.research@state.mn.us.

Our hopes

- This is a completely optional tool with no federal or state requirements tied to its use. Outside of the initial time it takes to learn, we are hoping that this will reduce rather than add to staff workload. We'd like to build a collaborative relationship around how we can learn about your data needs, identify and connect with data contacts at your agency, better understand what would be meaningful for you, and ultimately how we can better support you in using data to continuously improve practice.
- Seeking engagement
 - Try out Tableau, send us your feedback, and let us know what would be useful to your work
- Understanding where Tableau and data fit within our broader Continuous Quality Improvement (CQI) Process

Who to Contact with Questions?

- Login/Password Related Questions
 - We are hoping with this additional information agency admins/mentor will be able to assist users in setting up their accounts for Tableau and addressing login/password issues. If you have any additional questions please reach out to the SSIS Help Desk at dhs.ssishelp@state.mn.us or the Research team at the email below, and we will be happy to help.
- Dashboard/Data Related Questions & Feedback
 - Contact the DHS Research Team at dhs.csp.research@state.mn.us

Q & A

Thank You!

Please contact the CQI - Research and Evaluation Unit with any questions at:

- DHS.CSP.Research@state.mn.us