UNIVERSITY OF WASHINGTON

UW Profiles User Guide

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*Note: This user guide covers information about working with the Tableau **browser** interface. Tableau Desktop information is not included. UW Profiles is accessible from mobile and tablet devices. Some features are not available on these devices.*

Table of Contents

UW Profiles

UW Profiles is a web-based tool that uses visualizations created with Tableau Software. It is designed to provide University decision-makers with a dynamic way to access, explore, and understand University data. UW Profiles makes it easy to search and aggregate data at any level of the organization. These active reports are displayed as a **Tableau Dashboard.**

Accessing Using UW Profiles

UW Profiles Portal

You can access the **UW Profiles** portal by going to the following URL: https://uwprofiles.uw.edu/ (copy and paste in your browser).

The portal is available to anyone with a **UW NetID**. You will be prompted to log in with your **NetID** credentials.

*Note: You can also access **Academic Dashboards and Research Dashboards** through the Business Intelligence Portal for the University's Enterprise Data Warehouse. Peer Dashboards are not available in the BI Portal at this time. Copy and paste the following URL in your browser: https://biportal.uw.edu. Click the **Visualizations** button.*
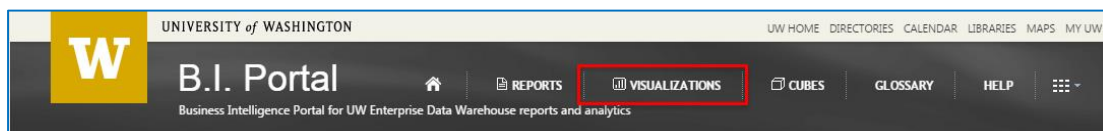
Permission

To access and interact with UW Profiles Dashboards you will need to have rights to **The Enterprise Data Warehouse (EDW)** and the **UW Tableau Server**.

Enterprise Data Warehouse Access
You can use **ASTRA** to check your access.
1. Log in to **ASTRA** using your **UW NetID** and password on the ASTRA website: https://ucs.admin.washington.edu/astra/
2. Click **Show me my authorizations**:
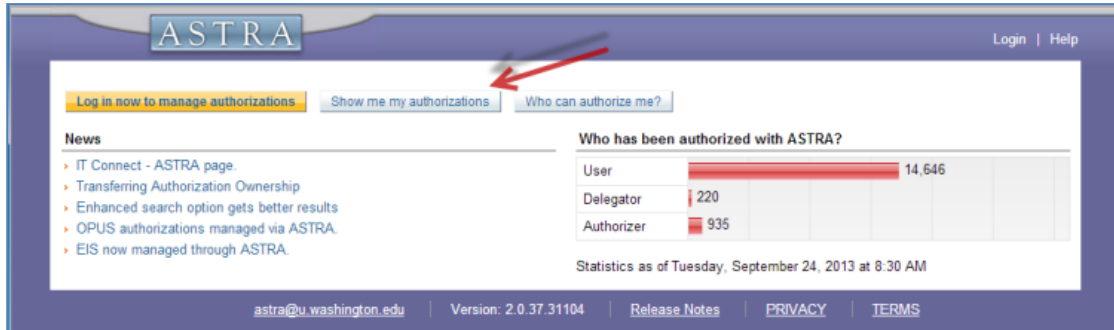
3. Your access level will be displayed.

4. Look under the application column. You have access to Enterprise Data Warehouse data if you see EDW listed. You can also see what role you have. The view above shows access to the EDW in an **Administrator** role.
5. If you need to request new or different access to EDW, visit the **Request Access** page here: http://www.washington.edu/itconnect/work/data/use-data/get-access/request-access/.

Tableau Server
Once you have obtained access to the EDW, access to the **Tableau Server** will follow within 48 hours.

Browsers
Mozilla Firefox or **Google Chrome** are the preferred browsers but UW Profiles Portal and Dashboards perform well in any browser.

Access From Outside UW's Network

If you need to access UW Profiles outside of the UW network, you will need to have **NetID** access through **Virtual Private Network (VPN)**. Information and instructions on setting up VPN are available here:
http://www.washington.edu/itconnect/wares/nebula/connecting-remotely/nebula-vpn-virtual-private-network-service/

Welcome Screen

You will be greeted by a welcome screen with links to a demonstration video, access information, FAQs, documentation, training and contact information. Click the **Close** button to interact with the page beneath.
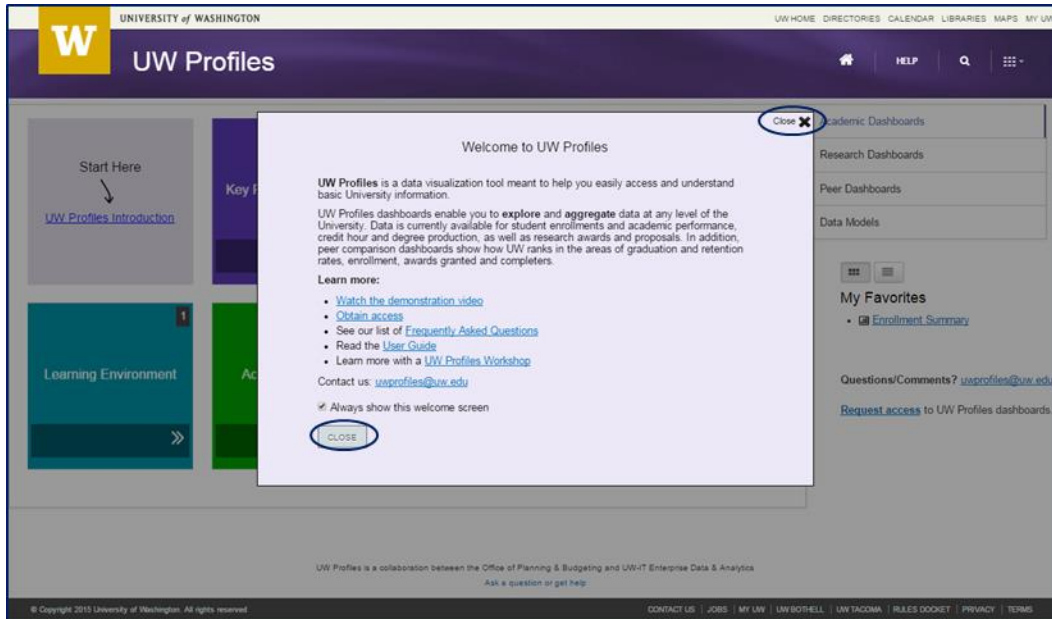
You can explore Academic Dashboards, Research Dashboards, Peer Dashboards and Data Models (see Data Models). **Select** a tile to open dashboards in a particular category from **Academic Dashboards**, **Research Dashboards** or **Peer Dashboards**.
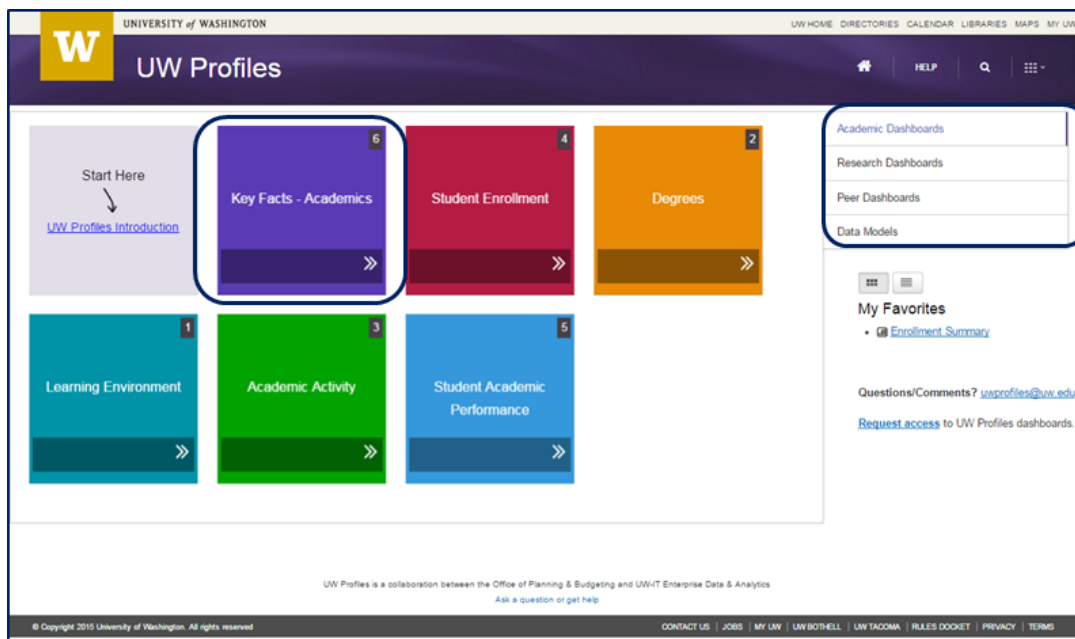
Thumbnails of dashboards will be revealed. Click a thumbnail to open the viz details page.
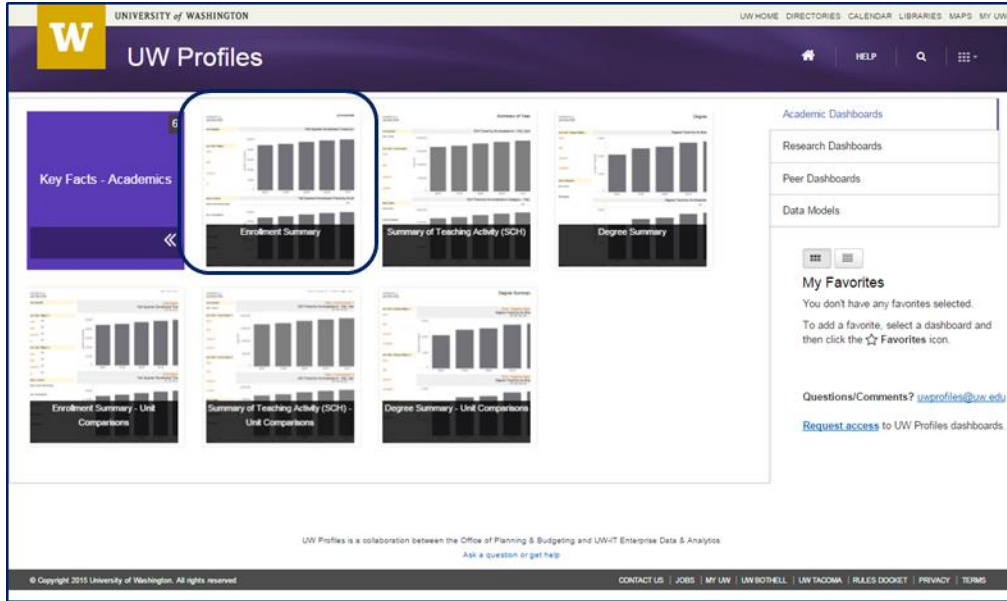

You can also view the dashboards in **list view**.
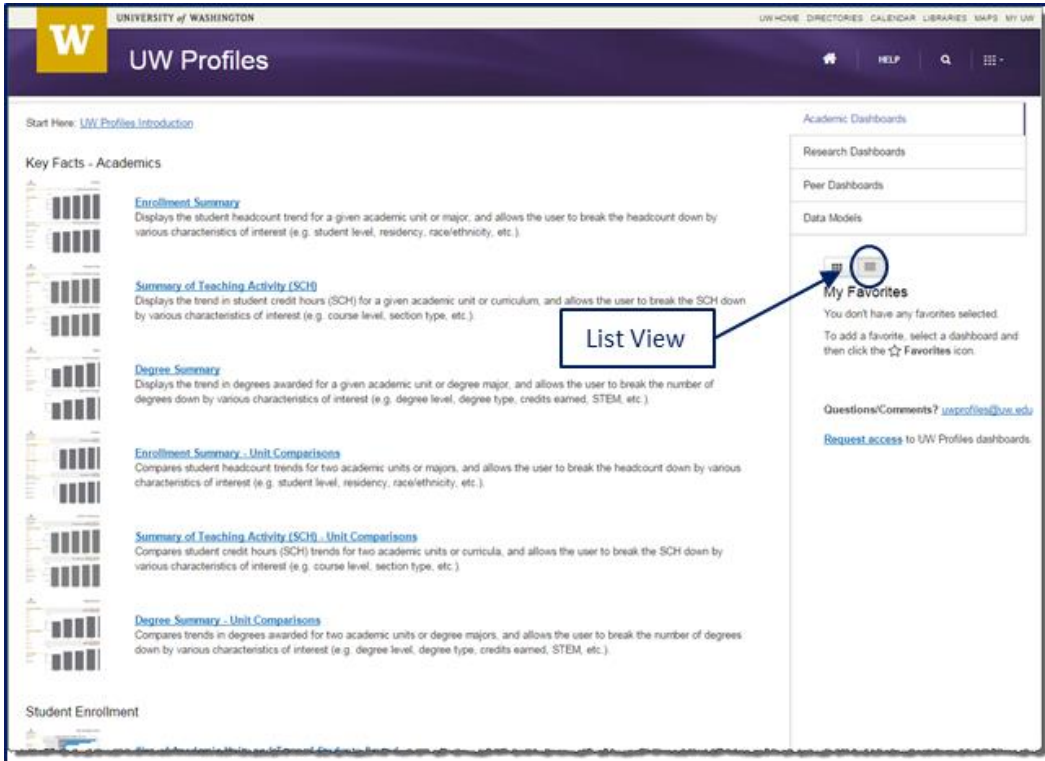
Dashboards

A dashboard is a collection of more than one visualization (viz) or table on a single page. You can compare and modify a variety of data simultaneously among multiple vizzes or tables. The dashboard content consists of two or more vizzes, ranging from area charts, crosstabs, bar charts, geographic maps and others.

When you open a dashboard details page, you will see a preview. You will need to **click** to interact with the dashboard.
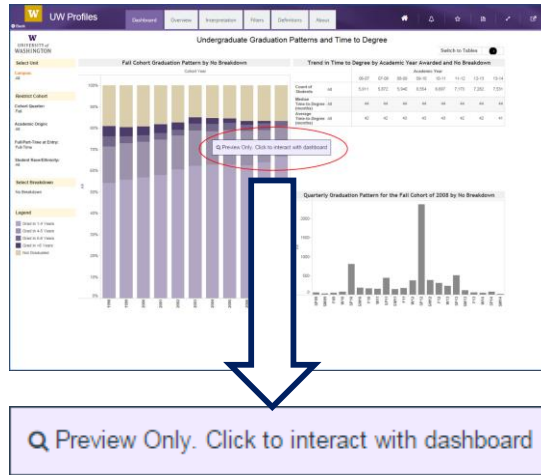

The sample dashboard below displays **Tabs, Filters**, **Legend, Navigation** toolbar, **Switch to Tables.**
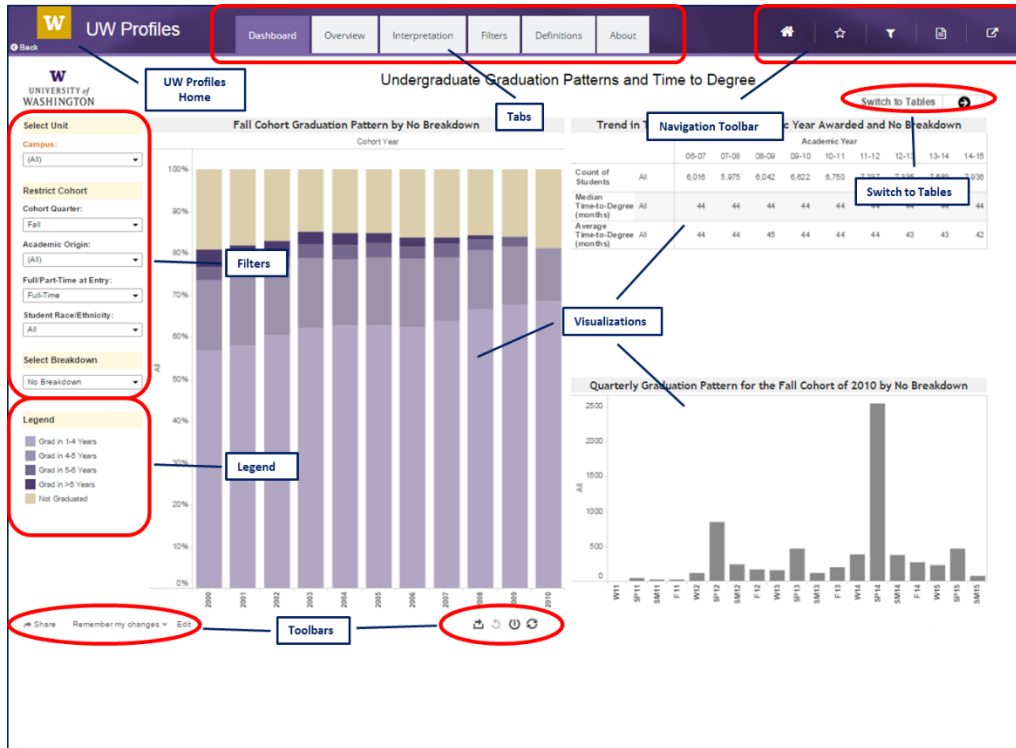
Tabs

Each tab reveals information to help you understand the dashboard in the categories shown below. *Note: all screenshots below are from the **Enrollment Summary**. The contents of the tabs will display information for that particular dashboard.*

| Dashboard | Overview | Interpretation | Filters | Definitions | About |
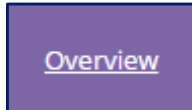
Overview

The **Overview** tab shows a high-level summary of the dashboard, including what measure we are tracking and what time period we are viewing.

Overview

The *Enrollment Summary* dashboard displays the number of students enrolled in a given academic unit or major, and allows the user to break the enrollment down by various characteristics of interest (e.g. student level, residency, race/ethnicity, etc.).

What is the measure we're tracking? The number of *students* registered in a given academic unit or major during the chosen time period and having a given characteristic. Every student count in this dashboard is a count of *unique* students in a given category – however, if a student falls into more than one category, that student is counted in each of the categories in which he or she falls.

The most typical example of this is a student who is registered for two majors: that student will appear in the total count of students for each of the units with which the student's majors are associated, but will only appear once in a university-wide total. Similarly, if the user selects to view data for an entire academic year (fall/winter/spring), a student who changed class from freshman to sophomore will appear once in each category in an enrollment breakdown by class.

What is the period we're looking at? The graphs show census day trend data for the selected quarter(s) since academic year 2006-07. The default reference quarter is fall, but users can choose to view winter, spring or summer (or any combination thereof) instead.

Interpretation

The **Interpretation** tab shows a graph-by-graph interpretation guide. You can read more about how to customize the dashboard in a number of different ways.

Graph-by-Graph Interpretation Guide

Using the Dashboard

Users can customize this dashboard in five ways:

1. by selecting the quarter (or quarters) for which they'd like to see trend data;
2. by selecting the unit or major they are interested in;
3. by restricting the student population displayed;
4. by selecting the attribute according to which enrollment figures are broken down; and
5. by choosing to view the number of students or the proportion of students in a given category.

Instructions highlighted in yellow on the dashboard indicate where each of these five selections can be made. They are described below in more detail:

1. **Selecting a Quarter**– By default, the dashboard shows census day information for fall quarters since academic year 2006-07. However, you can choose to view winter, spring or summer instead, or choose to combine several quarters of interest. This may be helpful if you are interested in viewing total *unduplicated* annual enrollment, for example.

   Note that when more than one quarter is selected, enrollment counts represent the number of students associated with a given academic unit over that range of quarters, and counts each student only once.

2. **Selecting a Unit or Major**– You can customize the dashboard to show only students associated with a particular academic unit, whether at the campus, college, or department level. You can also choose to limit the data further to a specific major or set of majors. Note that the drop-down menus are related to each other, so if you select Bothell under *Campus*, you will only see Bothell departments and majors in the other menus.

3. **Restricting the Cohort –** You may only be interested in enrollment trends for a given set of students (for example, entering undergraduates). The filters available in this section allow you to restrict the student population to the set of interest. The available filters are:

   a. *Student Level Sub-Group:* By default, the dashboard includes all undergraduates, graduates, and professional students. However, you can choose to limit the student population to one of these

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Filters

The **Filters** tab shows a list and explanation of all the filters used in the dashboard.

Filtering Options

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   a. *Student Level Sub-Group*: By default, the dashboard includes all undergraduates, graduates, and professional students. However, you can choose to limit the student population to one of these three groups.
   b. *Tuition/Fee-Based*: This menu allows you to display either *all* students or only students registered in tuition-based or fee-based majors.
   c. *New to Level*: It can be of interest to isolate new students to study emerging trends that may otherwise be overshadowed by the larger continuing student population. By default, the dashboard includes all students, but you can choose to restrict it to students who are new to their level of study at the UW (undergraduate, post-baccalaureate, graduate, etc.).
   d. *Full/Part-Time*: This menu allows the user to study only full-time students or only part-time students.
   e. *STEM Student*: Given the increasing interest in STEM enrollments, this filter allows for the data to be restricted to STEM or non-STEM students only. A student is categorized as STEM if he or she is enrolled in at least one major with a CIP code that is recognized as STEM by the Washington State Office of Financial Management.

   Note that the filters are additive. For example, if you select "Undergraduate" under Student Level and "New" under New to Level, you will see only students who are Undergraduate AND New.

Definitions

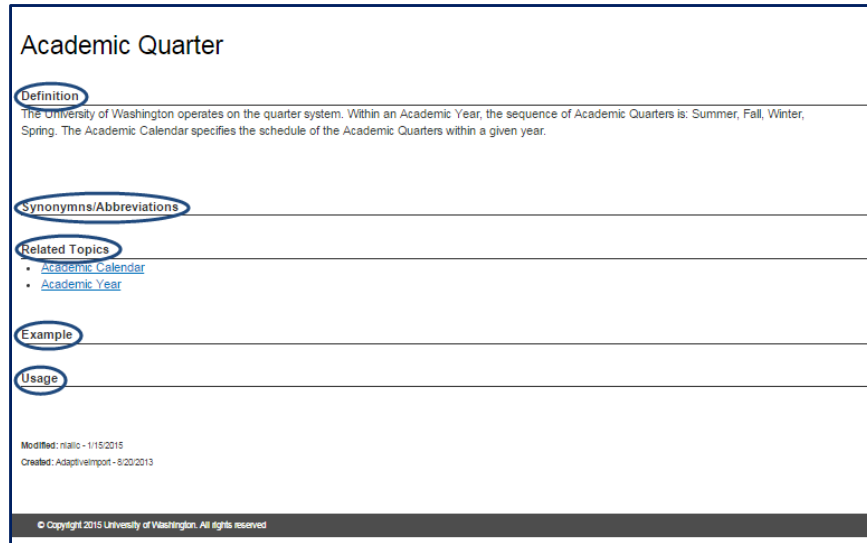The **Definitions** tab shows definitions relevant to the dashboard.

Term Definitions

[Link]

- **Academic Quarter**
  The University of Washington operates on the quarter system. Within an Academic Year, the sequence of Academic Quarters is: Summer, Fall, Winter, Spring. The Academic Calendar specifies the schedule of the Academic Quarters within a given year.

- **Campus**
  Term used to distinguish between UW Seattle, UW Bothell and UW Tacoma. UW units map to these Campuses through the Organization Code.

- **College**
  Conceptually, College refers to the aggregation of one or more academic departments into a broader academic organizational unit, supervised by a Dean. Functionally, College is one component of the hierarchy codified by the Organization Code; in that hierarchy, all units - including administrative ones - are grouped into "Colleges."

- **Cumulative GPA**
  The Cumulative GPA is an average of student grades weighted by the number of credits associated with each grade. It serves as a measure of the student's academic performance since the beginning of the student's studies at a given Student Level. It is expressed on a decimal scale from 0.00 to 4.00. Contrast Cumulative GPA with Term GPA and Degree GPA.

- **Department**
  An organizational unit at the University of Washington. Departments are identified by a unique Organization Code at the seven-digit level.

- **Fee-based**
  A program or course registration for which students are charged "fees" rather than tuition governed by the State Legislature and the Revised Code of Washington (RCW). (Contrast with Tuition-based.)

- **Full-time Student**
  An undergraduate or professional student is considered Full-time if he or she is registered for 12 or more Academic Credits per quarter. A graduate student is considered Full-time if he or she is registered for 10 or more Academic Credits per quarter.

- **Major**
  A major is a specific field of study into which a student matriculates.

- **New to Level**
  A student is considered New to Level in a given quarter if the student enters his or her level of study (non-matriculated/undergraduate/post-baccalaureate/graduate/professional) at the UW in that quarter (or – for fall quarter only – the prior summer). A student is New to Level the first quarter he or she is Enrolled (i.e. registered for at least one class in their new level) on Academic Census Day. This is regardless of campus, student class, or program, meaning that students can only be New to Level once for each level. Currently, New to Level is only used for the UW as a whole. It is possible that, in the future, it will be tracked for each campus (i.e., New to Level at Campus).

- **Part-time Student**
  An undergraduate or professional student is considered Part-time if he or she is registered for fewer than 12 Academic Credits per quarter. A graduate student is considered Part-time if he or she is registered for fewer than 10 Academic Credits per quarter. Contrast with Full-time Student.
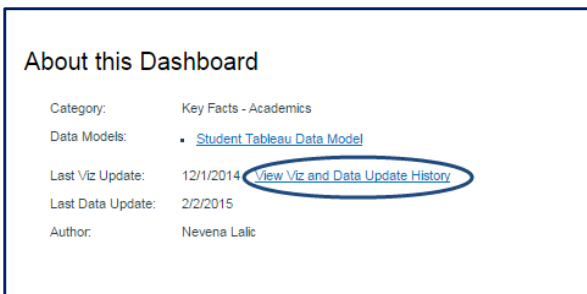
Click one of the links to open the definition details page. Details include:

- Definition
- Synonyms/Abbreviations
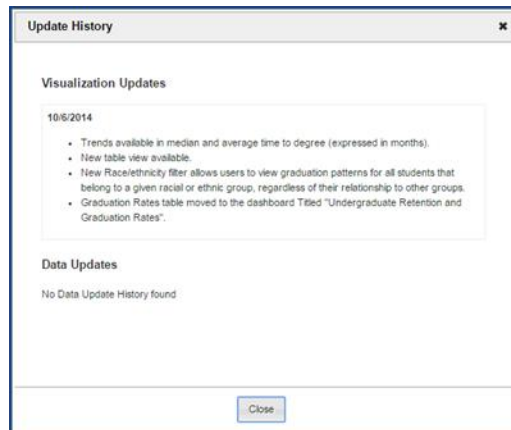- Related Topics
- Example and Usage
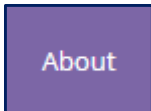
The **About** tab contains update history and a link to the Data Model(s) used to build the dashboard. *Note: Data Models are only available for Academic Dashboards. See* Data Model(s).

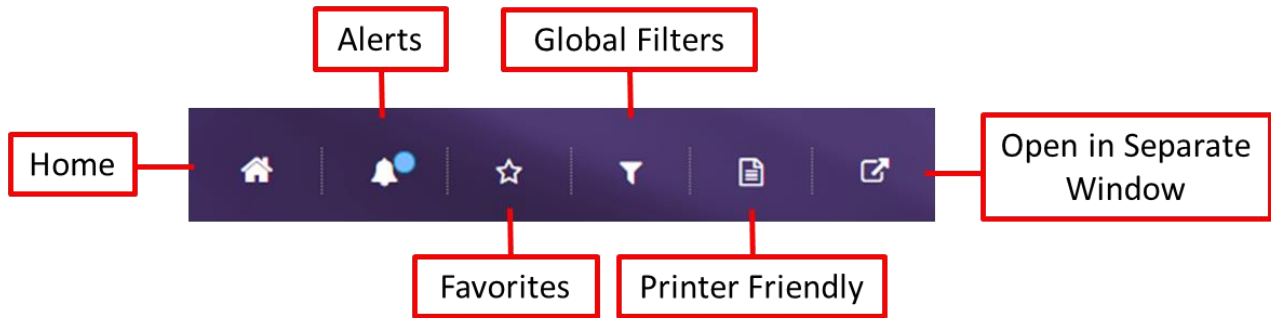Click the **View Viz and Data Update History** link to see a screen with updates.

When you open **Update History,** you will see a comprehensive list of the latest updates.

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Toolbars

Home

Click the Home button to return to the UW Profiles main page. You will be returned to the Dashboard page, in the list or the tile view.

Alerts

A colored dot on the Alerts button will be displayed if there are announcements or changes to a dashboard. Click the **Alert** button to show the alert. Click the **Close** button to close the alert.
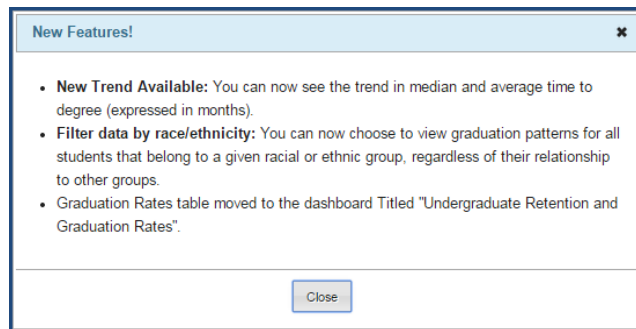
There are different levels of color coded alerts:

Blue = Notification
Yellow = Warning
Red = Critical Warning

The alert background title bar color will change color accordingly and the colored dot on the alert button will disappear once the Alert is read. The Alert content will still be visible after the Alert is read. You can click the button to re-read the contents.

Global Filters

Global filters allow you to filter data globally, across all *Academic Dashboards*. Click the Global Filter button to reveal the filter selections. The filter button will be displayed in gold when there is a filter applied.

Once you apply any of the filters, they will be active in all of the Academic Dashboards you select in the future.
*Note: A filter must exist within the dashboard in order for the global filter selections to be applied. Click the **Apply Filter** button to activate the filter. Click the **Clear Filter** button to clear the filter.*
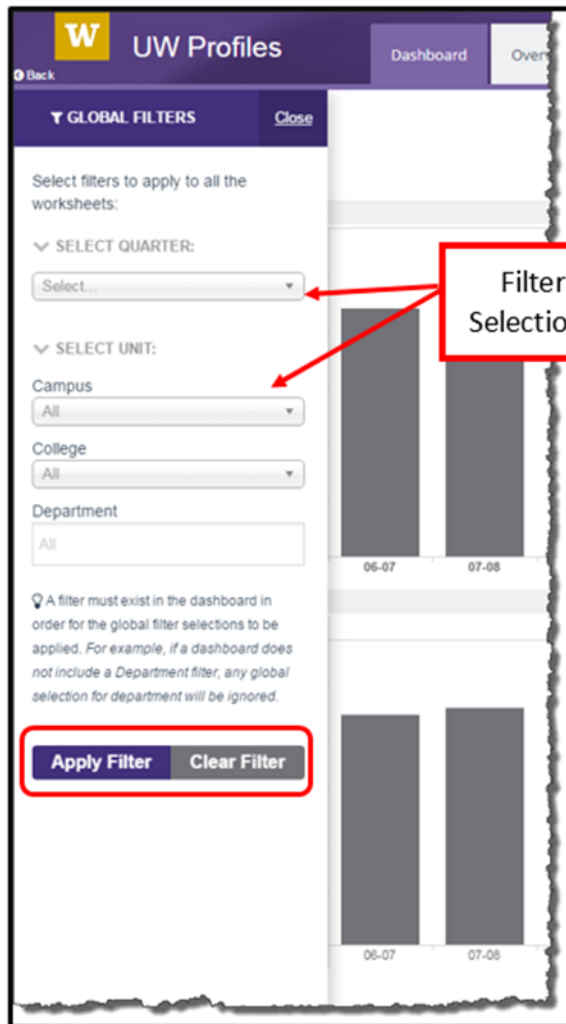
Favorites

You can save favorite dashboards by clicking the **Favorites** button on the **Dashboard Details** toolbar. A yellow star shows that this dashboard has been chosen as a favorite.

Printer Friendly Overview 📄

Click the Printer Friendly Overview Button to generate a printer-friendly summary, suitable for a handout or presentation.

Open dashboard in separate window ↗
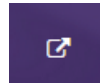
Click this button to open the dashboard in a separate window.
Note: This option takes you out of the UW Profiles Portal and directly to the UW Tableau Server.

Hover

You can hover your mouse over any mark (chart element) or point in the plot area to see more information. For example, by hovering over the **1998** column below, you can see **Student No Breakdown, Cohort Year and % of Cohort Grad in 1-4 Years**.
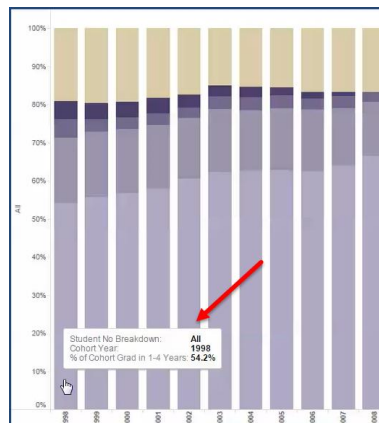
You can also hover over navigation buttons to show tooltips. The image below shows a **Show More Values** option.
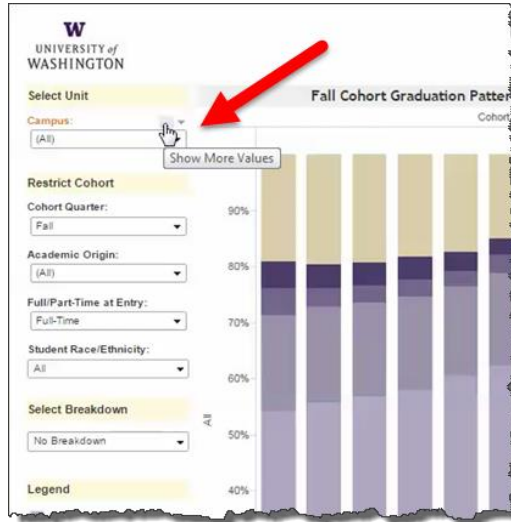
The image below shows a **Sorting** icon when the mouse is hovered near a breakdown.
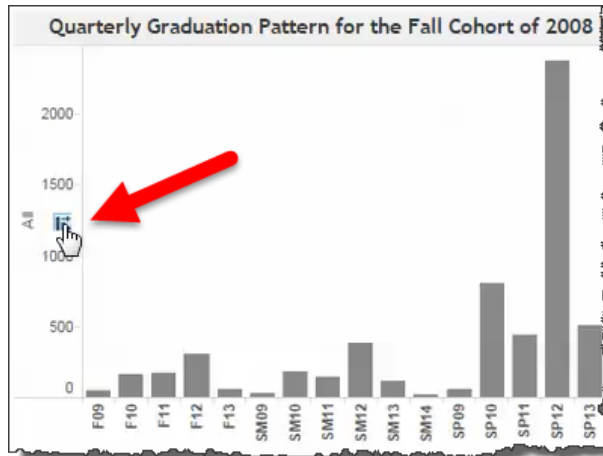
Filters

Filters are available for filtering views in a dashboard. By selecting a filter on the left panel, the dashboard will display data based on the filter selection.
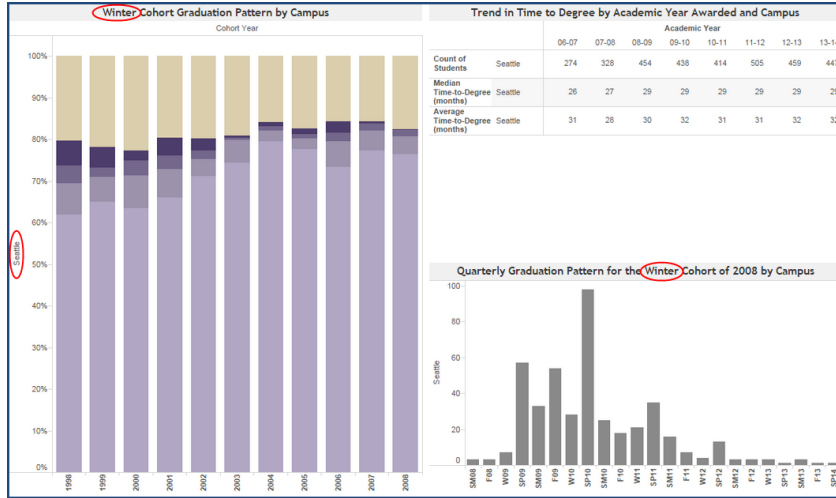
Filter by **Campus:**
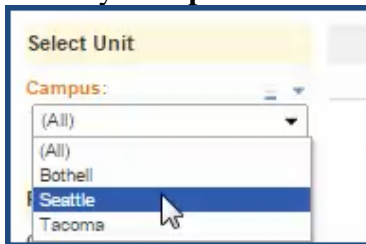
Filter by **Cohort Quarter:**
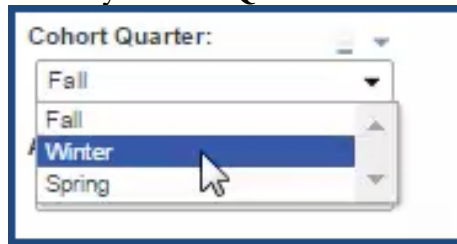
The dashboard will reflect the choices you made in the filters:

Zoom and Pan

To help you navigate views of maps, a toolbar appears when you mouse over a map in a dashboard. The toolbar lets you zoom in and out; zoom and center; select a rectangular, radial or lasso area; and return the map to its initial state. You can also **pan** by using the mouse.

Dashboard Toolbar

The UW Profiles Toolbar contains four buttons: **Export**, **Refresh**, **Pause/Resume** and **Revert All**.

Export

You can export a view as an image or PDF. You can also export the data as a crosstab or comma-separated value (.csv).

Select an option on the **Export** menu from the toolbar:
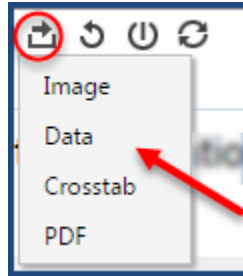
Export Image

When you export an **Image**, you will see this pop-up window. Click **Download** to download an image of your view.
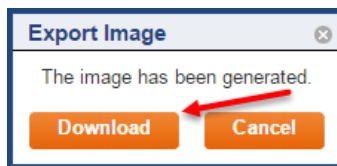
Export Data

When you export data, you will see a summary of the data in your view.

| AcademicYear	Main Breakdown	Measure Label	AGG(NumberOfStudents)	AGG(Percent of Students)	AGG(Student Measure)	ATTR(AcademicQuarter)
14-15	All	Number of Students	54,670	100.0%	54,670	Fall
13-14	All	Number of Students	53,072	100.0%	53,072	Fall
12-13	All	Number of Students	51,568	100.0%	51,568	Fall
11-12	All	Number of Students	50,738	100.0%	50,738	Fall
10-11	All	Number of Students	49,931	100.0%	49,931	Fall
09-10	All	Number of Students	48,870	100.0%	48,870	Fall
08-09	All	Number of Students	47,377	100.0%	47,377	Fall
07-08	All	Number of Students	45,405	100.0%	45,405	Fall
06-07	All	Number of Students	44,225	100.0%	44,225	Fall

Export Crosstab

When you export a **Crosstab**, you will see this pop-up window. Click **Download** to generate a **.csv** file. You can open a .csv file in **Microsoft Excel, Access or other application**.
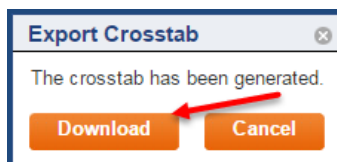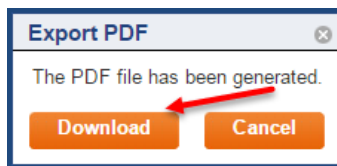
Export PDF

When you export a PDF, you will see this dialog box. Make your selections and then click **Export**.
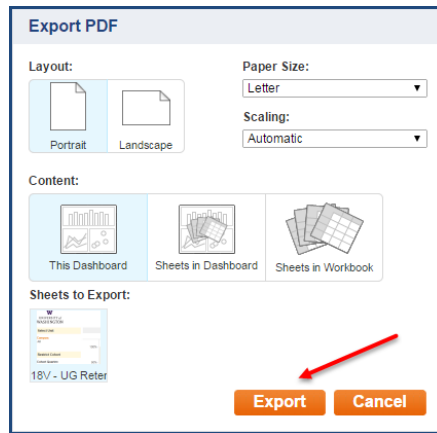
Click **Download**.

Revert All

You can revert any changes you have made, such as filter or sort, and restore the view to how it was originally published.

Pause Automatic Updates

As you interact with the view in your browser, a query is sent to the data source to update the data in the view. If you are working with a dense view containing a lot of data or a very large data source, the automatic update may take a long time. To avoid waiting for the screen to refresh each time you change a selection, you can click **Pause Automatic Updates** on the toolbar. This allows you to make several selections without having to wait for the refresh.

*Note: The dependent filters will not update while **pause** is selected.*

Resume Automatic Updates

When you are finished making selections and are ready for the view to refresh, click **Resume Automatic Updates** using the same toolbar button. You only have to wait for a single query to the data source to retrieve all your changes at once.

Refresh Data

If the data source has changed, the view will reflect those changes the next time you load the page. You may need to manually update the view using the **Refresh Data** button on the toolbar.

When you refresh the data, you clear any cache that may exist. The latest data from the data source will be refreshed. This option is different than the **Pause Automatic Updates** option, which may still load the view based on cached data. Depending on the size of your data source and the view, refreshing the data may take longer than other queries operating on cached data.

Sharing

You can choose to share original views or your customized views with others by clicking the **Share** button. You can copy and paste a link to add to an email message. Or copy and paste the URL to embed the dashboard in your website or send the link in an email message.

Note: The recipient or viewer of these links will need to have the UW NetID permissions mentioned in the
Access section above.
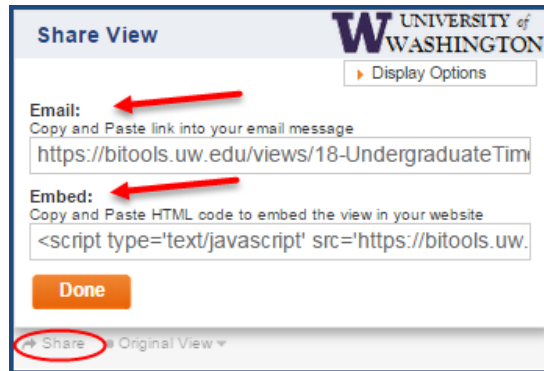
Remembering Changes (saving your customized views)

You can save any filter or breakdown settings you have made in your dashboard. Click **Remember my changes** and then enter a name for your view. Click **Remember** to save the view. Next time you visit this dashboard, you will find your saved view in the same location.

Name your view and click **Remember**:
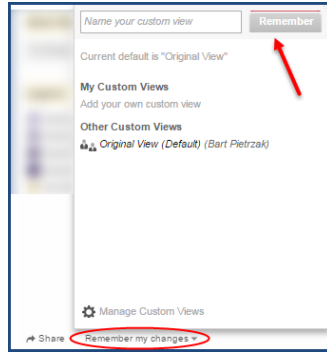
To revert to the original view, click **Original View**:
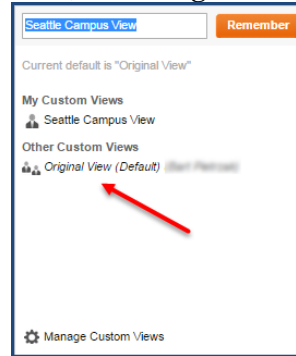
UW Profiles Data Models for Academic Dashboards

You can download the **data models** used to create the **Academic Dashboards**.

> *Important: You will need to have **Tableau Desktop Software** installed and you will need sufficient **ASTRA permissions** (see [Accessing Using UW Profiles](#) section above). **FiscalTech** and **PayrollCoordinator** roles do not have access. Users in this group will need to apply for another role to see student data.*

From the home page, click the **Data Models** tab.
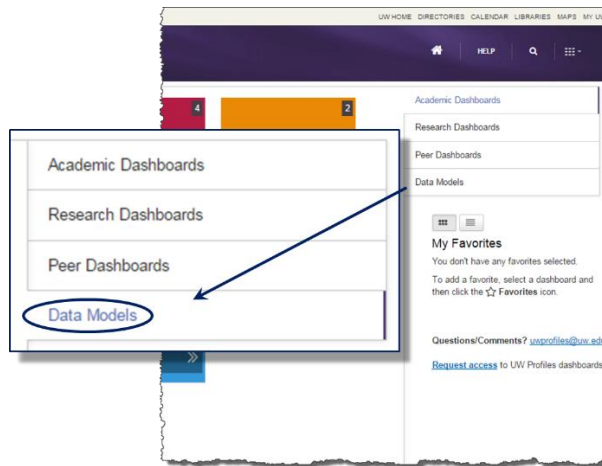
Data Model Page

You can see the data models in tile view or list view by clicking the view buttons.

Tile View:
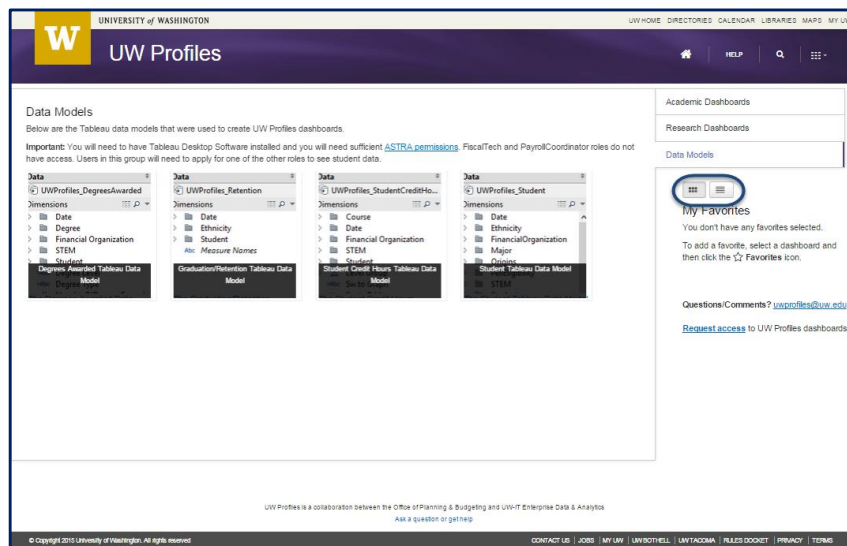
List View
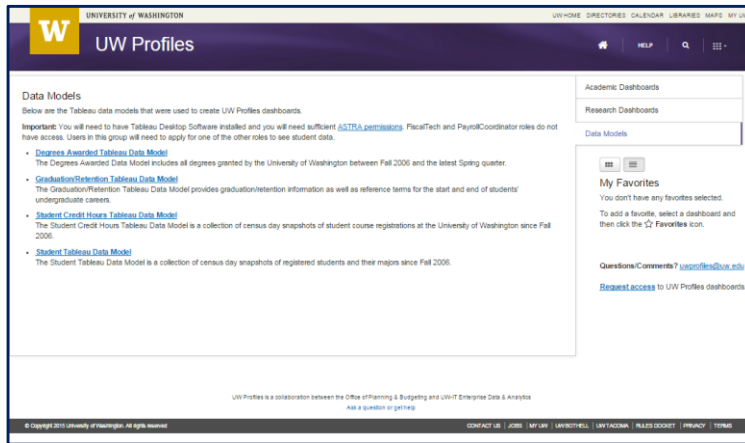
Click a data model tile or a data model link to view the **detail page.**

Data Model Detail Page

An alert button will be displayed to the right of the data model title if there are announcements or changes to a data model.

There are different levels of color coded alerts:

> **Blue** = Notification
> **Yellow** = Warning
> **Red** = Critical Warning

Click the **Download** button to download the data model. Click the **Data Model Wiki Page** link to read more detailed technical information. Click the **Add to Favorites** button to add this data model to **Favorites**.
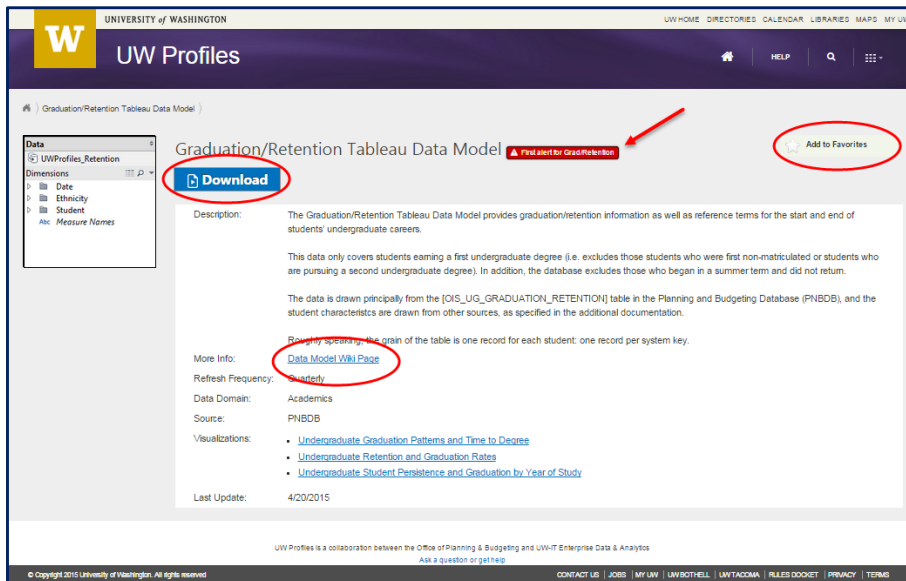
Data Model Wiki Page

The wiki page contains detailed information, including **Definitions** and **Source** tables.

Note: **Field Name** *is the name of the field in the data model and* **Definition** *is specific to UW Profiles.*

Add to Favorites – Data Model

You can add any of the **Data Models** to your list of favorites, along with any of the other dashboards you may have also added. Your list of favorites will be on the home screen and will have unique icons for dashboards or data models:
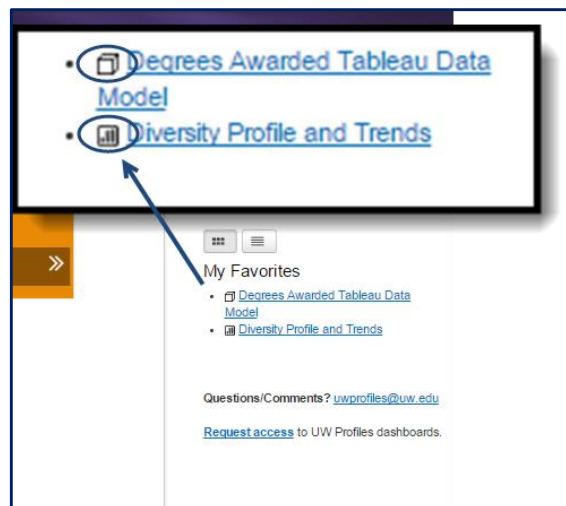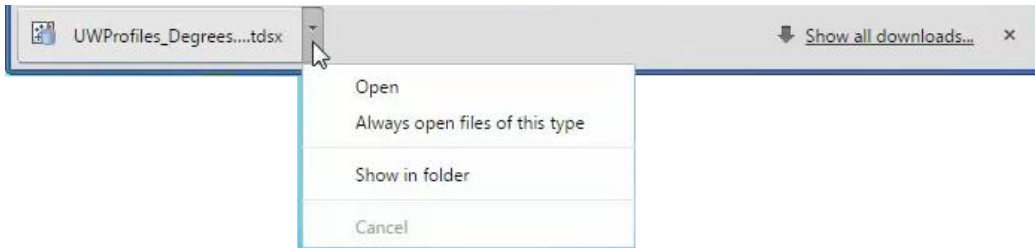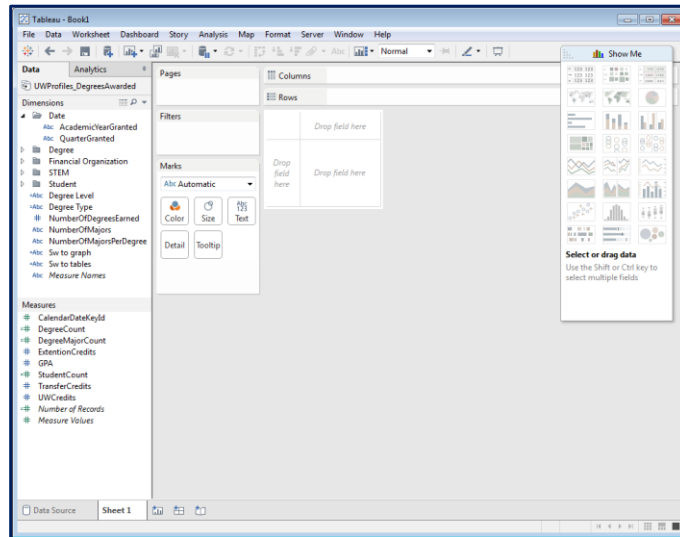
Data Model Download

Use your browser's download button or dialog box to open or save the data model once you click the blue Download button:
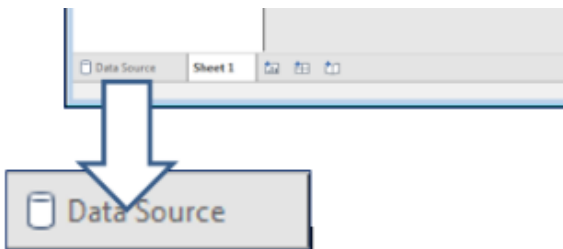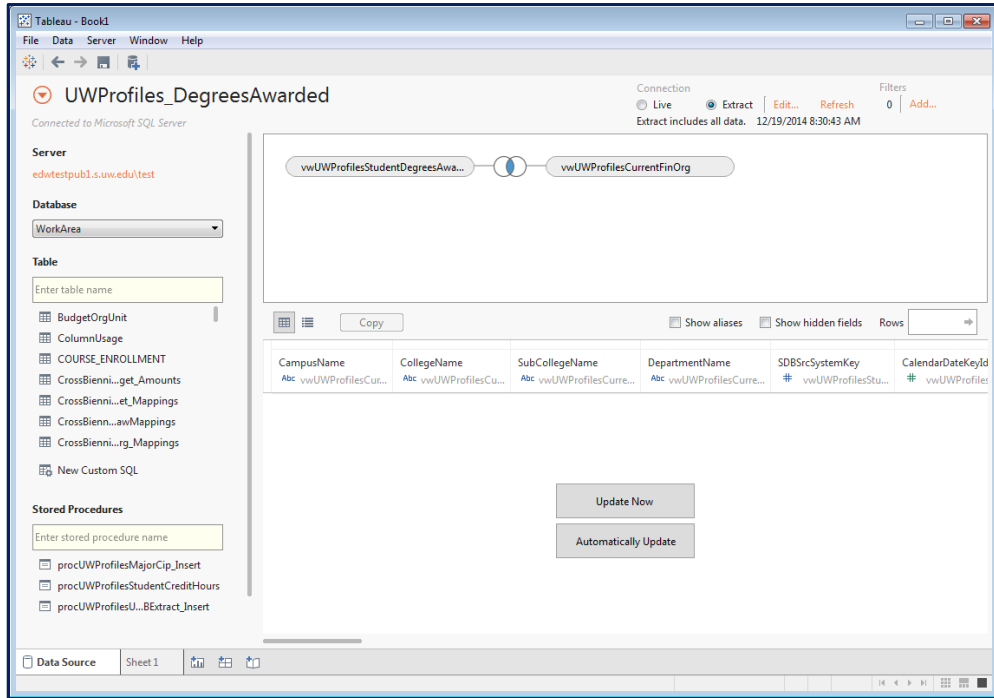

The image below is from Google Chrome:

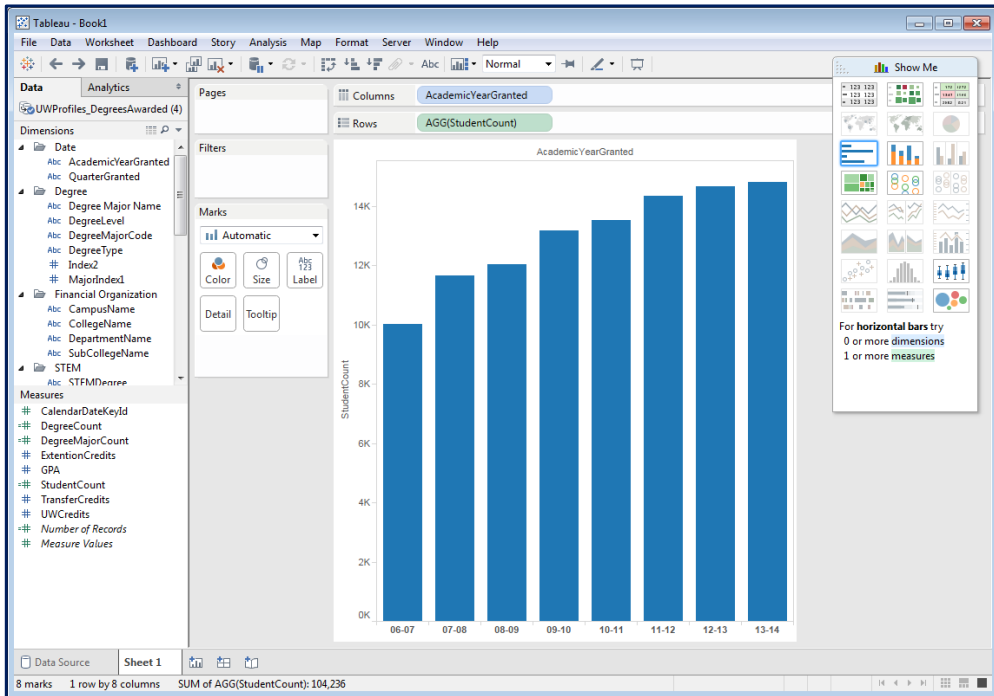The data model will open in **Tableau Desktop**:

Click the Data Source button to view the tables and joins used in the data model.

Tableau Data Source view:

Viz From Data Model:

*Note: The data models will open in the most current version of Tableau Desktop. All images in this User Guide are from **Tableau Desktop, version 9.0.***

Help

You can access **Help** for UW Profiles from the homepage.