

Tableau Reference Guide

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OHIA Portal

The OHIA Portal houses information regarding Tableau onboarding, training materials, and ongoing support. Click [here](#) to access the OHIA Portal (<https://ohia.mednet.ucla.edu/>). You can also access the OHIA Portal from the [Mednet Homepage](#) (<https://mednet.uclahealth.org/>). Under the **I Want To...** section, click on **OHIA portal** from the **View Analytics** sub-section:

U News ▾
Medical References ▾
Clinical Systems ▾
Business Systems ▾
System Resources ▾
Human Resources ▾
General Resources ▾

Quick Links

Mednet email (onsite & remote)
Paging | COVID-19 Paging
UCLA directory

Timesheets

DGSOM/FPG – [Time Suite](#) | [Web Clock](#)
Medical Center – [Time Suite](#) | [Web Clock](#)

Resources

At Your Service | UCPath
CICARE | eCard
Cornerstone Portal
Disaster information
Downtime resources
Medical Staff | IT Resources
Nursing dept | staff info

I Want To...

Change **password**
Learn about **DUO for MFA**
Access **eForms (Forms Portal)**
Scan using **iCAP**
Get a pager, phone or other device
Visit the **UCLA Health IT website**
Submit an **IT service request**
Access **SOFI event reporting**
Locate **policies and procedures**
Check **clinical privileges**
Store and share files using **Box**

View Analytics
OHIA portal
Capacity | MOVERS | Tableau server

Frequently Used

CareConnect

Access CareConnect – **remote** | **local**
Search tip sheets & eLearnings
Review updates
Register for training
Request optimization

Clinical References

Lippincott - Procedures | Advisor
DynaMed Plus | UpToDate | Micromedex
Embase | PubMed
CURES Database

Additional Resources

Compliance services
Conference Rooms - DGSOM | Hospitals

Tableau Definitions

Role	Role Description	Responsibilities & Permissions
CoE Tableau Administrator (Lead Admin)*	A CoE Tableau Administrator is a conceptual role, not a Tableau role. The Lead Admin will also be a Project Leader for the CoE with the additional responsibilities listed below.	<ul style="list-style-type: none"> Ensure the minimum necessary amount of RI is used in workbooks and is shared with the minimum number of people Be aware of responsibilities and permissions of all Tableau roles, before requesting user access Contact Compliance when any sensitive data elements (such as RI/PHI) are in a new data source Ensure space requirements are met Ensure workbook performance testing is done Ensure files on Citrix and Tableau Server are managed (delete old files, ensure no duplicate files exist, follow file naming conventions, etc.)
Project Leader* (Lead)	A Project Leader is a developer with additional administrative duties. The role will be the same individual(s) across all Tableau Projects. Typically there are a max of 2 Project Leaders per CoE One of the Project Leaders is the CoE Tableau Administrator's backup.	<ul style="list-style-type: none"> Tableau users with this role can open, interact and edit all CoE published content on Tableau Server from Tableau Desktop Can download and move all published workbooks Has all Publisher and Interactor functionality

Role	Role Description	Responsibilities & Permissions
Publisher* (Pub)	A Publisher is a Tableau Developer who can publish content but does not have any administrative duties	<ul style="list-style-type: none"> Can create and publish content from Tableau Desktop to Server Can view and interact with all CoE published content on Tableau Server Has all Interactor role functionality
Interactor (Int)	End users or consumers of published Tableau dashboard; not provisioned a Tableau Desktop license Tableau Interactor Training Video	<ul style="list-style-type: none"> Can access and interact the published content via the Tableau Server(s) based on project/workbook permissions (hide, sort, and filter) Download PDF version of views
Validator (Val)	Interactors that are granted access for a specified period of time to validate developed content in the VAL site.	Has Interactor role functionality

*Requires a Tableau Desktop license

Tableau Server Access and Definitions

Tableau Server access is set up through Tableau Projects and Active Directory (AD) Groups. Projects on Tableau Server have a similar concept to a folder. Folders contain multiple files or in this case, Projects contain multiple workbooks. Each unique set of consumers will need a new project. For instance, if 5 Interactors can view 3 workbooks, one project will be created. If only 3 of those 5 interactors can view another workbook, a new Project is needed for that workbook. Each set of unique interactors will also have their own AD Group. See definitions below.

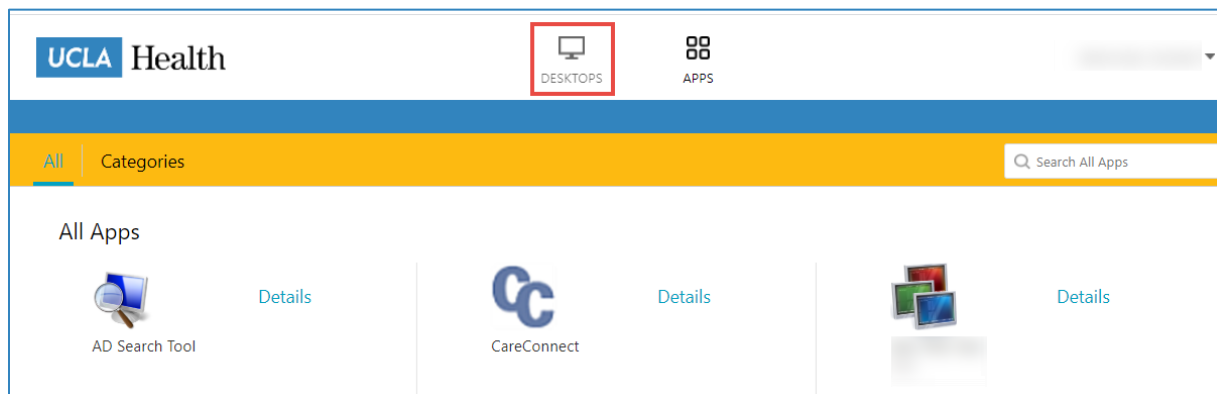
Term	Definition
Project	A Tableau project is like a folder that can contain Tableau workbooks and data sources published on the Tableau Server.
Non-RI Project	A place on Tableau Server to store workbooks that do not contain restricted information.
RI- Project	<p>A place on Tableau Server to store workbooks that contain any restricted information. Restricted information (RI) is defined by UCLA's Office of Compliance. See http://compliance.uclahealth.org/workfiles/FAQs/Restricted Information Definitions - rev 20130205.pdf</p> <p>*Please note the Download Summary Data option is disabled for RI projects. If your use case requires Restricted Information to be downloaded, please reach out to selfserviceanalytics@mednet.ucla.edu.</p>
RI	Restricted Information (RI) includes PHI, but also any other types of confidential patient, employee, student, research subject information, including intellectual property and proprietary information. Learn more about Restricted Information here . Contact the Office of Compliance Services (InfoSecAll@mednet.ucla.edu) for any questions.
PHI	<p>Protected Health Information is any data that can be used to contact, locate, or identify a specific individual, either alone, or if combined with other sources that are easily accessed. See below for a comprehensive list of PHI:</p> <ul style="list-style-type: none"> Names Street address, city, precinct, zip code, & equivalent geocodes Dates (except year) (e.g. birth date, admission/discharge date, date of death & all ages over 89*)

Term	Definition
	<ul style="list-style-type: none"> • Phone and Fax numbers • Social Security numbers (SSN) • Medical Record Numbers (MRN) • Health plan beneficiary numbers • Account numbers • Certificate/License numbers • Vehicle identifiers & serial numbers, including license plate numbers • Vehicle identifiers & serial numbers, including license plate numbers • Device identifiers and serial numbers • Web Universal Resource Locators (URLs) • Internet Protocol (IP) address • Biometric identifiers • Full face photographic images <p>Any other unique identifying number, characteristic, or code (not including the unique code assigned by the investigator to code the data), or information that can be used alone or in combination with other. Any code used to replace the identifiers in datasets cannot be derived from any information related to the individual and the identifiers, nor can the method to derive the codes be disclosed. For example, a subject's initials cannot be used to code their data because the initials are derived from their name.</p>

How do I access Tableau?

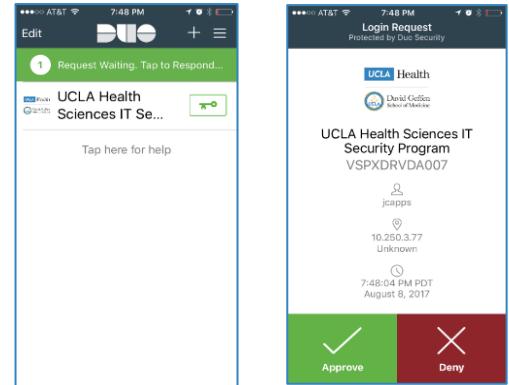
Tableau Desktop is located on a virtual desktop called Citrix. You must be enrolled in DUO Mobile's 2-factor authentication application in order to access the Citrix environment. Click here to watch the TAB101 video or use the following steps:

1. Go to the [UCLA Health Mednet Homepage](#)
2. From the **Business Systems** dropdown, select **CareConnect Local**
3. Enter your AD credentials
4. From here, click the **Desktops** icon at the top of the page



5. Double click **Tableau Desktop CX7**. If prompted, Run or Install the Citrix ICA Client

6. You will receive a notification on the mobile phone enrolled in DUO. Click on it and hit **Approve**
 - a. If no notification shows automatically, your push notifications from DUO Mobile might be disabled in your phone settings. Click into the DUO Mobile application and click the “Tap to Respond” green bar in order to **Approve**



Citrix Data Transfer Process

The Citrix Desktop is a secured environment that only allows one-way file transfers. You cannot take files out of Citrix, but you can bring files in via the following Citrix Data Transfer Process.

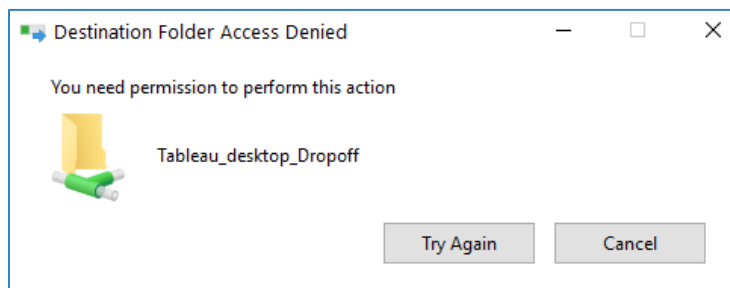
Creating a DropOff Folder:

To add the DropOff Folder:

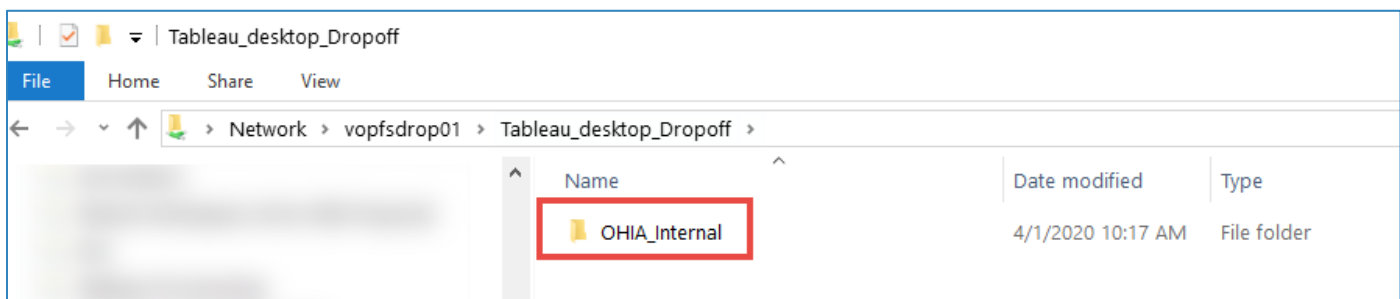
1. Right-mouse click your desktop. Click **New**, then click **Shortcut**
2. Under **Type the location of the item** paste this link : (\\vopfsdrop01\Tableau_desktop_Dropoff) and click **Next**
3. Name the shortcut **Tableau DropOff** and click **Finish**

Importing File(s) into Citrix






1. Double click to open the **Tableau DropOff** folder.
 - a. You cannot drag and drop your data sources directly into the Drop-Off folder. You will encounter the following message if you do:











2. Drag the data source/file to your specific CoE folder:
 - a. There is an automated process that moves your file to the **PickUp** folder in the Citrix environment within 2 minutes



3. In the Citrix desktop, you'll see a folder named **PickUp**. This is where you'll find the file you moved from your local machine
4. Locate the **Save** folder on the Citrix desktop. This where you should save all of your documents. Only people who have access to the Citrix Desktop within your CoE are able to see your files.
 - a. When you open the **Save** folder, it should look like the following:

Name	Date modified	Type
 Ad Hoc	7/26/2017 9:25 AM	File folder
 Development	6/5/2017 9:12 AM	File folder
 Master	5/3/2017 8:30 AM	File folder
 Published	7/11/2017 12:53 PM	File folder
 Restricted	6/3/2016 3:03 PM	File folder

- b. As an example, in each folder, you can create unique project sub-folders or user folders:

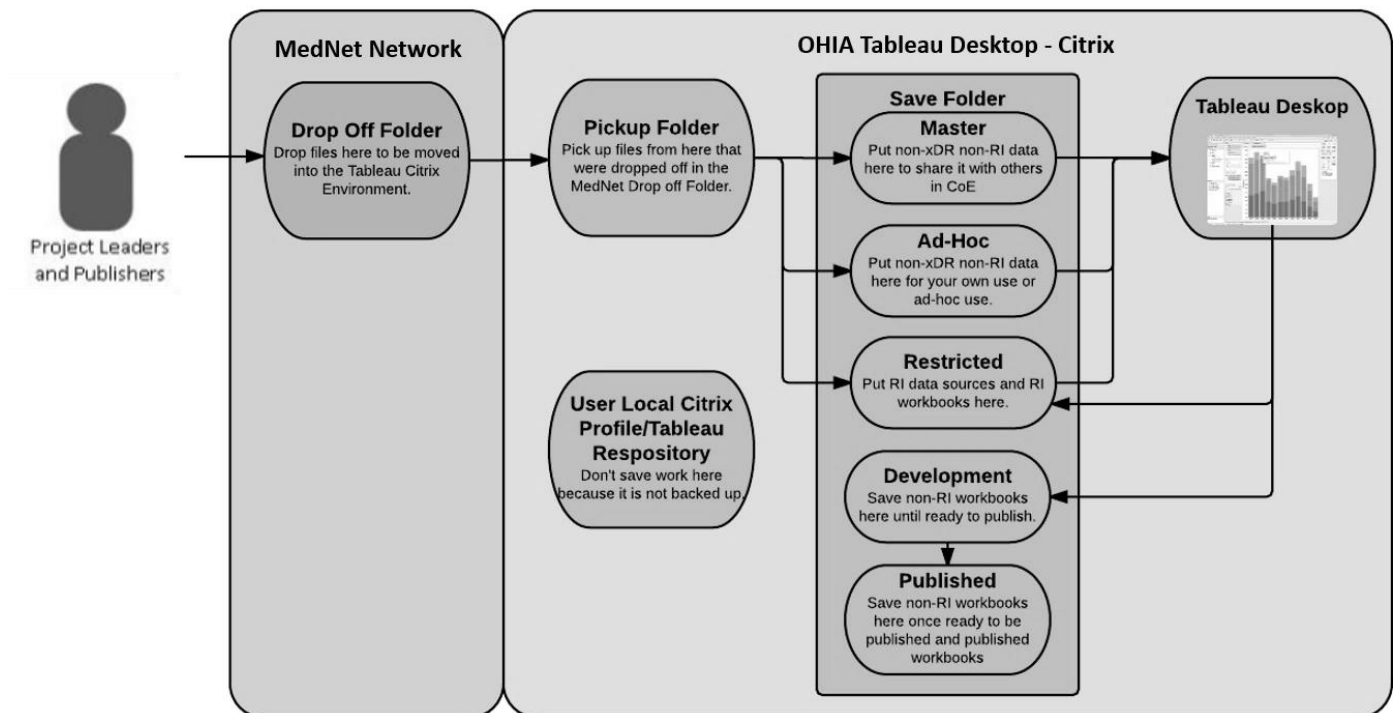
Name	Date modified	Type
 ADhar	7/27/2017 12:07 PM	File folder
 ghohman	6/15/2017 12:25 PM	File folder
 JCapps	8/3/2017 9:28 AM	File folder
 Jholman	7/27/2017 10:37 AM	File folder
 Jsand	2/22/2017 9:18 AM	File folder
 MikeS	12/15/2016 9:13 PM	File folder
 OHIA - EIA Data Governance	1/13/2017 12:48 PM	File folder
 SABukishk	8/3/2017 9:31 AM	File folder

5. Drag and drop your document from the **PickUp** folder into one of the sub-folders
6. Delete the file(s) from the **PickUp** folder
 - a. Right-mouse click the file(s) located the **PickUp** folder and hit **delete**

Warning: You should only be accessing your files from the **Save** folder when developing dashboards in Tableau. The **PickUp** folders are NOT backed up and cannot be recovered. Do not save your work in the **User Local Citrix Profile** or **Tableau Repository**. Your work will not be backed up.

Simplified Guide: Transferring Files from my Computer to the Citrix Desktop Environment

1	On your Computer	Use the DropOff folder to drop files to be moved into the Tableau Citrix Environment
2	On the Citrix Desktop	Use the PickUp folder to pick up files that were dropped off on your computer's DropOff folder
3		<p>Move the files to the Save folder</p> <p>There are five sub-folders in the Save folder. Save your file with what makes most sense regarding your project.</p> <ul style="list-style-type: none"> • Master: Put non-xDR non-RI data here to share it with others in your CoE • Ad Hoc: Put non-xDR non-RI data here for your own use or ad-hoc use • Restricted: Put RI data sources and RI workbooks here • Development: Save non-RI workbooks here until ready to publish • Published: Save non-RI workbooks here once ready to be published and published workbooks
4		Delete your files from the PickUp folder



Connecting and Publishing Data Sources

You may be connecting to different data sources within Tableau, which leads to questions regarding how to connect or when you need to publish a data source. The below decision tree walks you through this process.

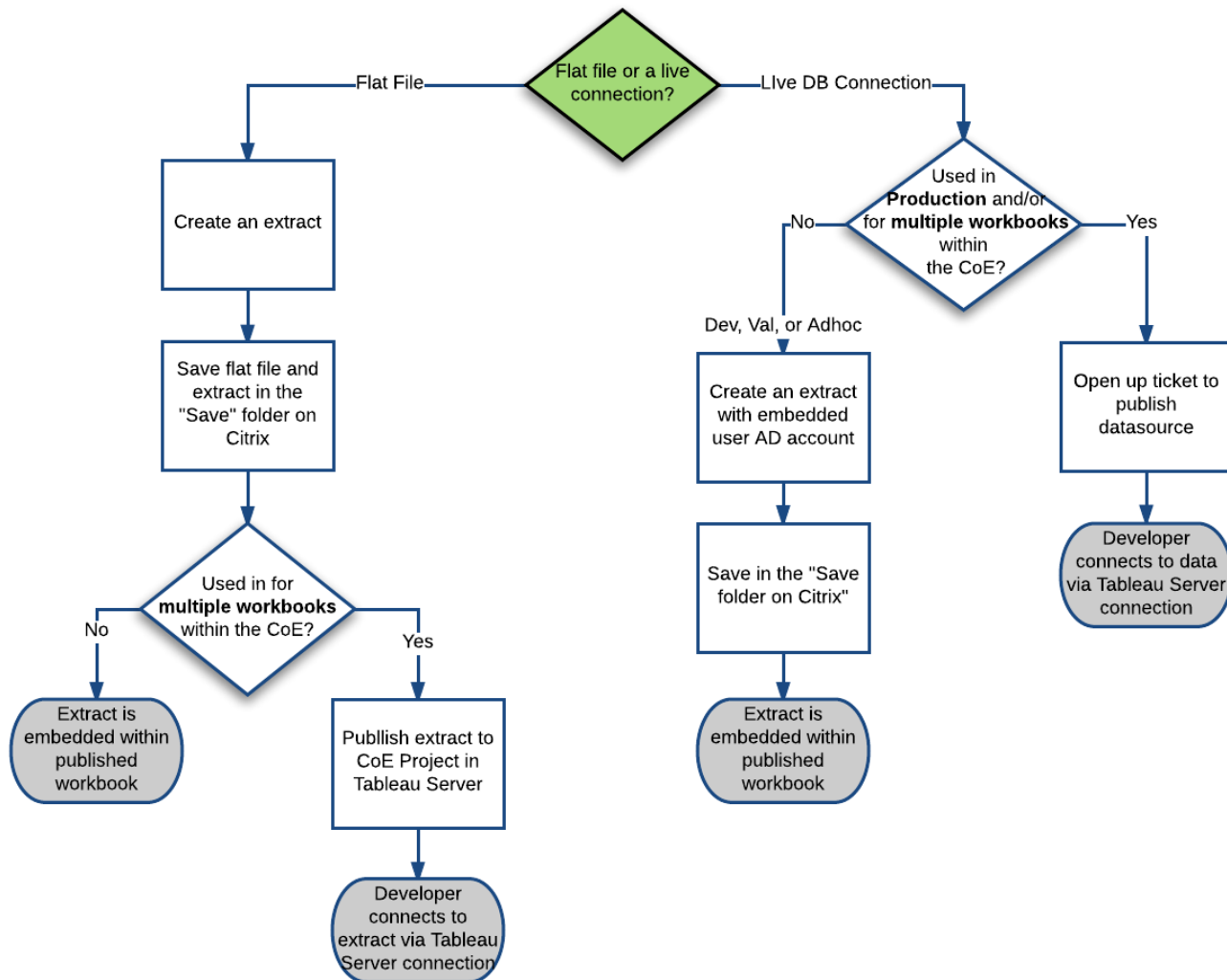
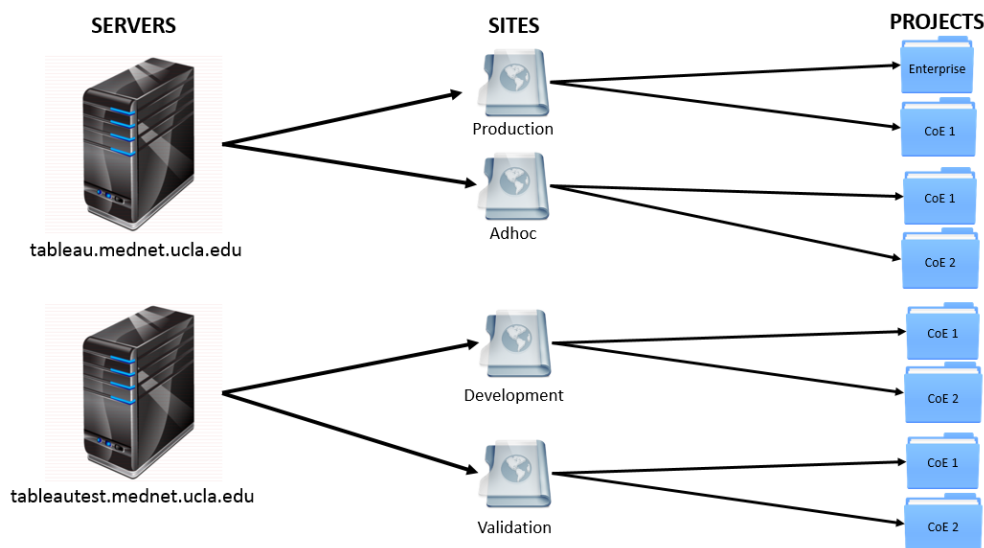
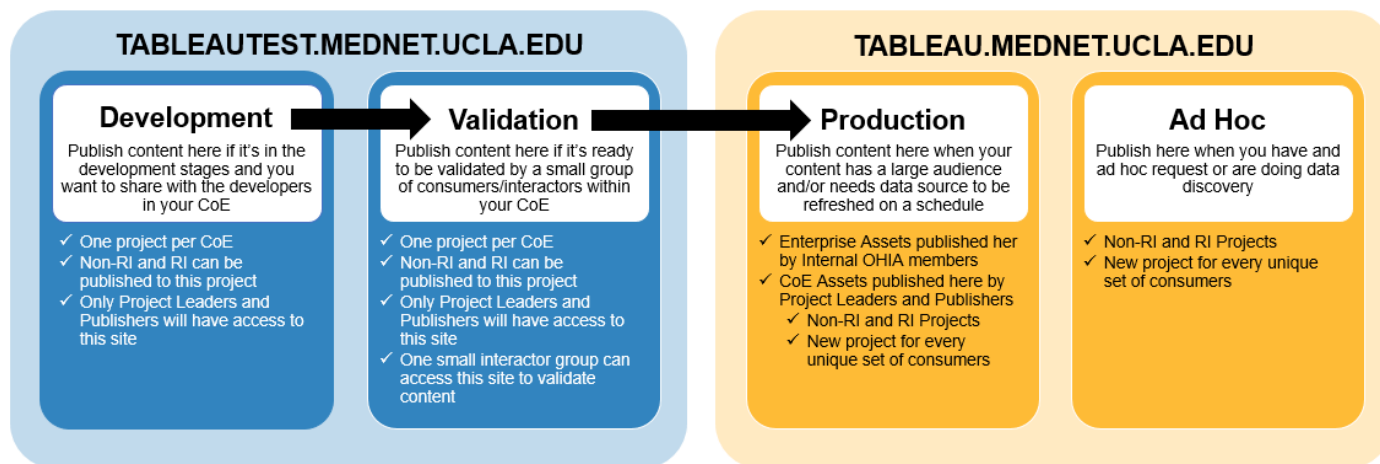


Tableau Server Infrastructure

There are two main servers, Tableau and Tableau Test. The Tableau server, commonly referred to as the Production Server, is for fully developed content that your end users (interactors) will access. The Tableau Test server is for development and validation purposes. Both servers have multiple sites and each has a different purpose, explained below:



Purpose of Each Site/Environment



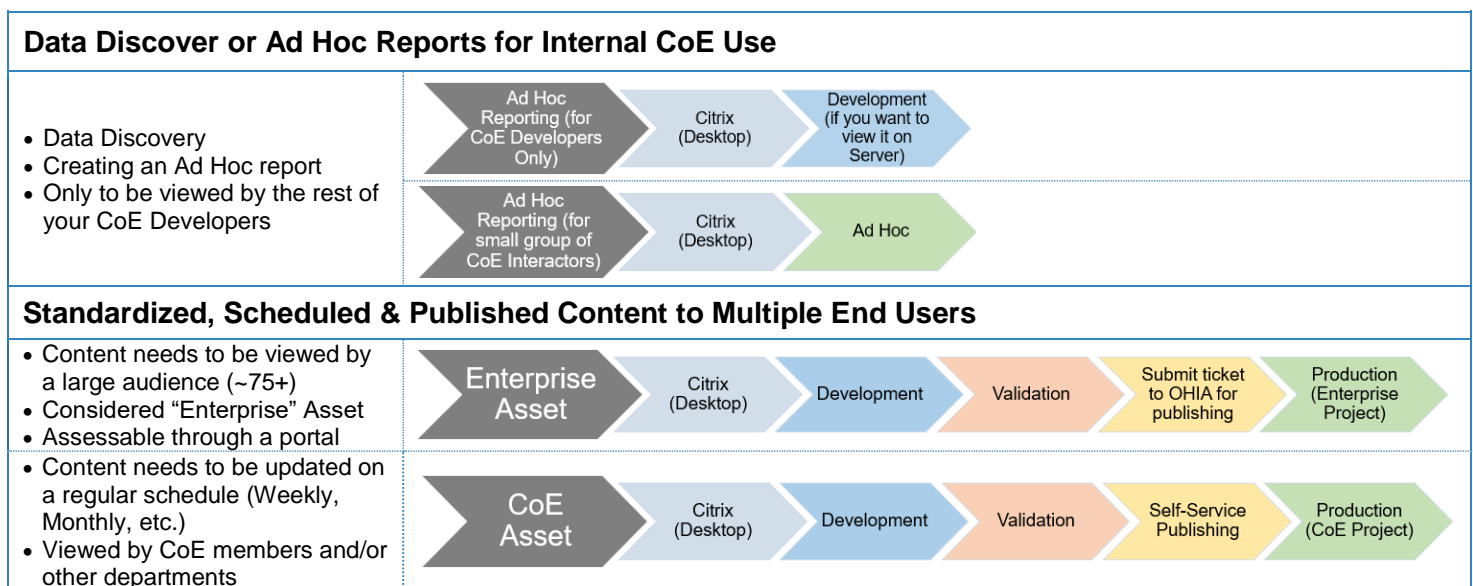
Environment Access Matrix

Not all Tableau roles have access to each environment. The below table calls out those access levels. If you have questions about each role and their responsibilities or permissions, click [here](#).

Role	Ad Hoc Environment	Dev Environment	Val Environment	Prod Environment
Project Leader	✓	✓	✓	✓
Publisher	✓	✓	✓	✓
Interactor	✓	✗ Dev is only used for project leaders & publishers	⏸ Limited access when project leaders and publishers need reports to be validated by end users	✓
Legend: ✓ = Access ✗ = No access ⏸ = Temporary/limited access				

Recommended Development Paths

Now that you have an understanding of each site and what they are used for, you may have questions about the process or development path you should take for each of your use cases. Below are the recommended development paths.



Publishing

Content developed on Tableau Desktop can be shared with your CoE members via Tableau Server. UCLA Health users who have authorized Interactor access to your CoE projects can see your published dashboards. Content must go through the following checklist before getting published on Tableau Server. Please see below for to ensure you are safely sharing your developed content.

Checklist

If developed content includes PHI

- ✓ The content developed must include the absolute minimum RI necessary.
 - If possible, do not include names, SSN or Healthcare Beneficiary ID to reduce risk for identity theft
 - Sensitive content such as mental health, substance abuse, and sexually transmitted disease information should only be included when absolutely necessary
- ✓ Access given to the minimum necessary number of users
- ✓ Ensure all Interactors in the Restricted Project have authorized and justified access
- ✓ Publish to the intended Restricted Project on Tableau Server

If developed content does not includes PHI

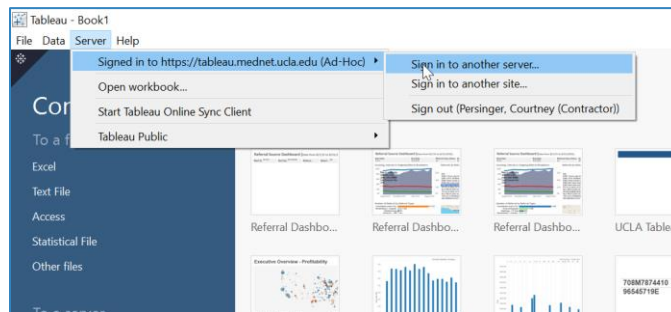
- ✓ Publish to the desired non-Restricted folder within your CoE

Once published, notify Interactors

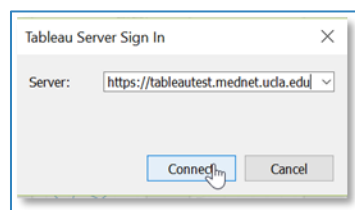
- ✓ If Interactors need assistance navigating the Tableau Server, [send them this video](#)

How to Publish

1. On Start Page before a workbook is opened, go to **Server** on the top navigation and **Sign into another server...**

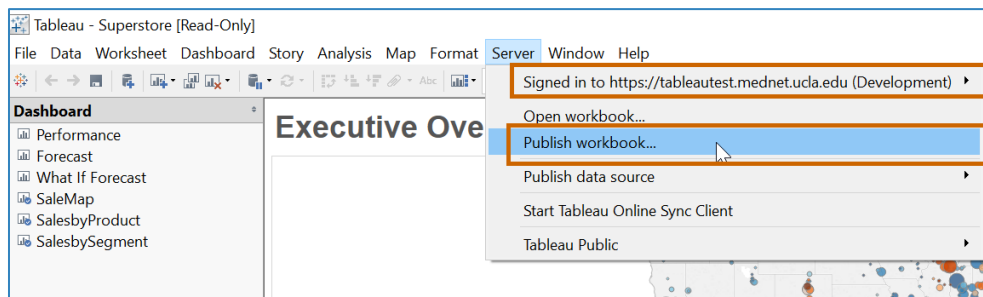


2. Sign into the desired server and site:
 - a. Sign into server **tableautest.mednet.ucla.edu** if you need to publish to the **Development** or **Validation** sites
 - b. Sign into **tableau.mednet.ucla.edu** if you need to publish to the **Ad Hoc** or **Production** sites



3. Open your workbook from the **Save** Folder

- Go to **Server** on the top navigation and make sure you're publishing to the correct server and site and choose **Publish Workbook**



Common Migration Issues

If you go to **Server** on the top navigation, and see the **Signed into...** is disabled, it's because you are currently connected to a data source from that server. If you open up a new workbook, by going to **File > New**, you'll be able to sign into the appropriate server and then open your saved workbook from that Tableau instance.

CoE Auditing

All Tableau developers within a CoE can view the CoE Auditing workbook. This workbook contains information on content views, access list, and space storage information.

How to access the CoE Auditing Workbook:

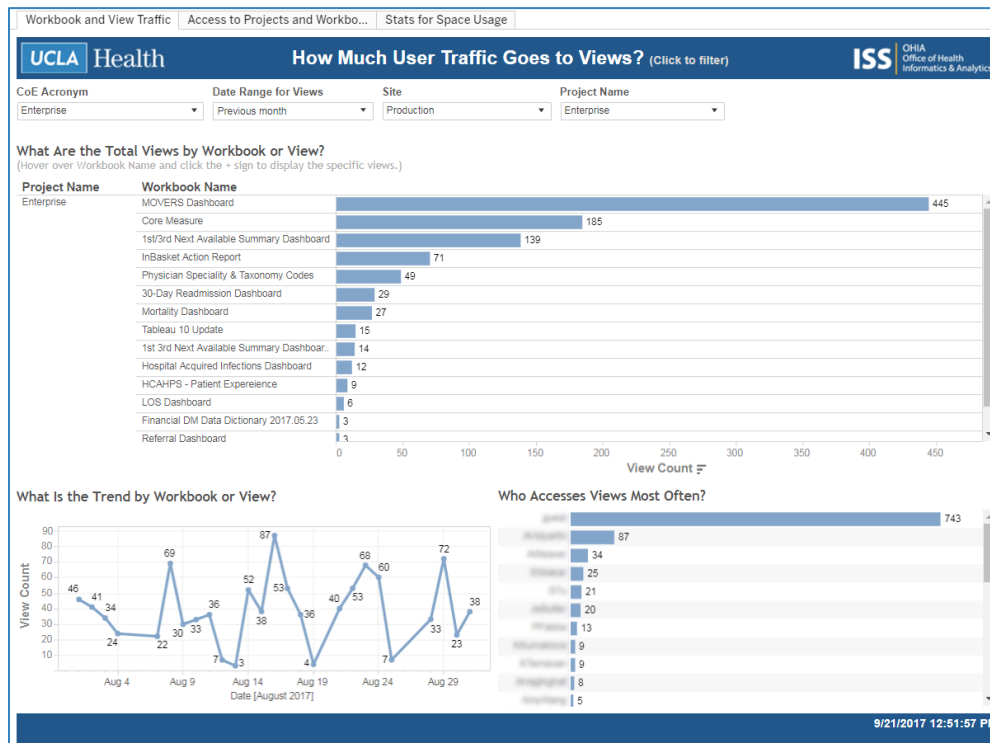
Locate the workbook here: <https://tableautest.mednet.ucla.edu/#/site/Development/workbooks/377/views>

Or:

- Sign into tableautest.mednet.ucla.edu server, **Development** site
- Locate and open the **Administration** project
- Select the **CoE Auditing** workbook
 - If you do not see this workbook, please e-mail SelfServiceAnalytics@mednet.ucla.edu

Available CoE Auditing Views:

Workbook and View Traffic



Access to Projects and Workbooks

Workbook and View Traffic | Access to Projects and Workbooks | Stats for Space Usage

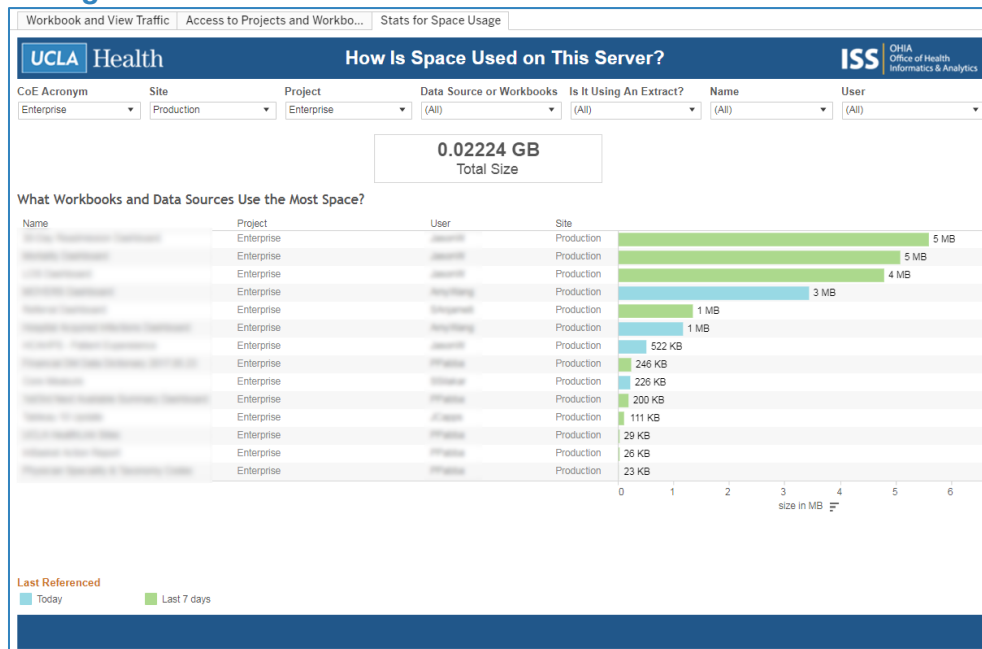
UCLA Health **Access to Projects and Workbooks**

ISS OHIA Office of Health Informatics & Analytics

CoE Acronym: Enterprise | Site: (All) | Project Name: Enterprise | Workbook Name: Null | Group Name: (All) | User Name: (All)

Site	Project Name	Role	Group Name	User Name
Production	Enterprise	Project Leaders	OHIA_Tableau_DOM_Lead	Sato, Jonatan R.
			OHIA_Tableau_OHIA_BI_Team_Lead	Miller, Travis
			OHIA_Tableau_QIA_Lead	Loring, Lethrick
			OHIA_Tableau_QIA_Lead	Salonga, Reynaldo S.
			OHIA_Tableau_QIA_Lead	Slater, Ryan
			OHIA_Tableau_QIA_Lead	Wu, Wang
		Publishers	OHIA_Tableau_DOM_Pub	Cole-Krout, Barry
			OHIA_Tableau_DOM_Pub	Clayton, Phewsh
			OHIA_Tableau_DOM_Pub	Sato, Jonatan R.
			OHIA_Tableau_DOM_Pub	Meyers, Zuzanna
			OHIA_Tableau_DOM_Pub	Mogil, Donald
			OHIA_Tableau_DOM_Pub	Tordella, Megan L.
			OHIA_Tableau_DOM_Pub	Waterman, Benjamin Aaron
			OHIA_Tableau_OHIA_BI_Team_Pub	Artemov, Anna-Lisa M.
			OHIA_Tableau_OHIA_BI_Team_Pub	Baillie, Angela Interguard
			OHIA_Tableau_OHIA_BI_Team_Pub	Benjamin, Morris Y.
			OHIA_Tableau_OHIA_BI_Team_Pub	Benn, Joanne J.
			OHIA_Tableau_OHIA_BI_Team_Pub	Chengelis, Rong R.
			OHIA_Tableau_OHIA_BI_Team_Pub	Conrad, Alex
			OHIA_Tableau_OHIA_BI_Team_Pub	Hoschek, Faye
			OHIA_Tableau_OHIA_BI_Team_Pub	Jain, Ankur
			OHIA_Tableau_OHIA_BI_Team_Pub	Kaplan, Alexander
			OHIA_Tableau_OHIA_BI_Team_Pub	Kim, So-Hye
			OHIA_Tableau_OHIA_BI_Team_Pub	Loring, Lethrick

Stats for Space Usage



How to Submit a Ticket to Self-Service Analytics Team

This section explains how a Primary Contact or Tableau Administrator can submit a ticket for ongoing Tableau support. Service Level Agreement (SLA) is a max of 10 business days, since these requests often require more than one team to complete them.

To initiate a ticket:

1. Go to the [UCLA Health Mednet Homepage \(https://mednet.uclahealth.org\)](https://mednet.uclahealth.org)
2. Under the **I want to...** section, click on **Submit an IT service request**. From the following page select **Request a Service**:

IT Service Catalog Quick Links

UCLA Health IT—comprised of ISS, OHIA, and DGIT—develops and maintains the central technology infrastructure and provides services across the UCLA Health Sciences. Please find popular IT service requests below. For more information about additional IT services and topics, please visit [IT from A-Z](#).

Buttons: Report an Issue, Request a Service, Request an Optimization, View Tickets

3. Your ticket should look like the following:

Ticket - TX002129322

Number: TX002129322

Caller: [Name]

Department: [Name]

Contact #: [Name]

Alternate Number: [Name]

Building: [Name]

Room: [Name]

Login Department: [Name]

DEP ID: [Name]

Customer watch list: [Name]

Short Description: [Name]

Description: [Name]

Ticket Type: Service Request

Opened: 08-30-2019 15:04:27

Opened by: [Name]

State: New

New Interactors

Complete the ticket by using the template below. The Yellow highlighted fields indicate data you should provide that is specific to your CoE, i.e. your CoE name, users that need access, the correct AD Group they need to be added to, etc. Security groups are synced with Tableau Server 3 times a day every 8 hours, e.g. 6am, 2pm and 10pm. Please note, if your access is provisioned during these windows, try again after the next sync.

Short Description field: **[CoE Name or Acronym]** CoE – New Interactor Request
Description field:

- Ticket for: OHIA Self-Service Engagement
- AD Name of User(s):
 - JSnow
 - JDoe
 - JSmith
- AD Group Name of Project that user needs to be added to (You can view the names of the AD groups on the [CoE Auditing Dashboards](#) or your original "Tableau Setup Complete" e-mail)

Short Description	ABC CoE- New Interactor Request
Description	Ticket for: OHIA Self-Service Engagement AD Name: JSnow JDoe JSmith AD of Project: OHIA_Tableau_ABC_Strategy_Int

New Publisher(s)

Complete the ticket by using the template below. The Yellow highlighted fields indicate data you should provide that is specific to your CoE, i.e. your CoE name, users that need access, etc.

Short Description field: **[CoE Name or Acronym]** CoE – New Developer Request
Description field:

- Ticket for: OHIA Self-Service Engagement
- Developer's Full Name
- AD Name:
- Role: Lead, Tableau Admin, or Publisher?
- Publisher AD Group Name (You can view the names of the AD groups on the [CoE Auditing Dashboards](#) or your original "Tableau Setup Complete" e-mail)

* Short Description	ABC CoE - New Developer Request
Description	Ticket for: OHIA Self-Service Engagement Developer's Full Name: Joe Bruin AD Name: JBruin Role: Publisher Publisher AD Group Name: OHIA_Tableau_ABC_Pub

New Project(s)

Complete the ticket by using the template below. The Yellow highlighted fields indicate data you should provide that is specific to your CoE, i.e. your CoE name, users that need access, etc.

Short Description field: **[CoE Name or Acronym]** CoE – New Project Request
Description field:

- Ticket for: OHIA Self-Service Engagement
- Proposed Project Name
- Will it be a Non-Restricted Information or Restricted Information project?
- List of Interactor's AD Names (If applicable)

Short Description	ABC CoE- New Project Request
Description	<p>Ticket for: OHIA Self-Service Engagement</p> <p>Proposed Project Name: Strategy</p> <p>Will it be a Non-Restricted Information or Restricted Information project? Restricted Information</p> <p>List of Interactor's AD Names: JaneDoe, SSmith, VKarr</p>

General Tableau Questions?


Complete the ticket by using the template below. The Yellow highlighted fields indicate data you should provide that is specific to your CoE, i.e. your CoE name, users that need access, etc.

Short Description field: [CoE Name or Acronym] CoE – Tableau Assistance
Description field:

- Ticket for: OHIA Self-Service Engagement
- Detailed description of your question/issue
- Screenshots if applicable

Short Description	ABC CoE- Tableau Assistance
Description	<p>Ticket to: OHIA Self-Service Engagement</p> <p>I need help troubleshooting my report which contains RI. I cant get my calculation to work.</p>

Troubleshooting

Issue In	Problem	Resolution Steps
Dual Access Authentication (DUO)	<ul style="list-style-type: none"> - Cell phone number change - Device change (same phone number) 	Call Helpdesk (310-794-4357)
Citrix Issues	Tableau won't launch in Citrix (user has previously accessed)	Call Helpdesk
Locked Out When Logging into Citrix (AD)	Can't log in to Citrix using AD account (user name):	Call Helpdesk (310-794-4357)
Locked Out When Logging into Citrix (DUO)	<ul style="list-style-type: none"> - Waited too long to approve DUO authentication, resulted in this error message:  <ul style="list-style-type: none"> -Attempted Five times 	Access will be automatically reset in 5 minutes
Web Browser Issue	User can't connect to Tableau Server	<p>Make sure you are either onsite, or VPNd into the Mednet Network</p> <p>Call Helpdesk (310)794-4357</p>
Interactor/Publisher Access	User has been added to the AD group provisioning them access as either an interactor or publisher but they don't have access yet.	Security is synced 3 times a day; 6am, 2pm and 10pm. If your access is provisioned during these windows, try again after the next sync