Intro to Tableau

Qualtrics to Tableau: Creating a Dashboard

Cultivate Learning Innovation Lab Workshop
November 23, 2020 | Monday | 1:00 - 2:30 p.m.

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Learning Agenda

- Connecting to data source
- Step-by-step demo
  - Qualtrics
  - R
  - Tableau
- Next steps

"The University of Washington acknowledges that it sits on Indigenous Land, which touches the shared waters of all tribes and bands within the Duwamish, Suquamish, Tulalip, and Muckleshoot Tribes."

Learning Agenda
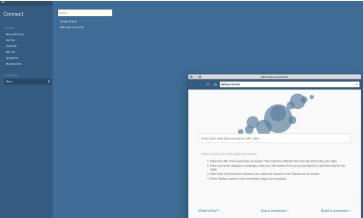
- Connecting to data source
- Step-by-step demo:
  - Qualtrics
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  - Tableau
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[Prep] Connecting to Data Source

- Most common to our work
  - Excel -> XLS & XLSX
  - Text File -> CSV
  - Tableau Desktop Only: MORE -> Microsoft Analysis Services (OLAP based)-> WELS
  - **Qualtrics -> Tableau?**
    - **Application Programing Interface -> Web Data Connector**
    - **But... what if we don't have $ to purchase API?**

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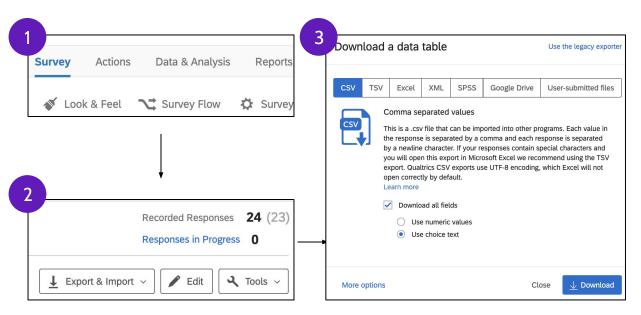
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[Overview] Workflow

- Goal: Create a Tableau Dashboard
- Estimated time frame: 8 - 12 hours
- Ingredients
  - Data: Qualtrics CSV file (Wide to Long)
  - Composition (a.k.a. Sketching your masterpiece):
    - Tableau Workbooks
      - Quantitative likert-type scale: Stacked bar chart(s)
      - Qualitative feedback: **List** or Wordcloud
    - Branding
      - Cultivate Learning logo
      - Typography: Roboto / Cabin fonts
      - Color palette
        - Purple (Pantone Matching System Color 267 C): HEX 5F259F
        - Green (PMS Green C): HEX 00AB84
        - Golden Yellow (PMS 1225 C): HEX FFC845

[Prep] Data export from Qualtrics

- Data & Analysis
- Export & Import
- Download data as a CSV file
  - **Choice text**
  - Numeric values

[Prep] Data export from Qualtrics

StartDate	EndDate	Status	IPAddress	Progress	Duration (in seconds)	Finished	RecordedDate
Start Date	End Date	Response Type	IP Address	Progress	Duration (in seconds)	Finished	Recorded Date

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[Prep] R workflow

- Step 1: Loading packages
- Step 2: Loading data set
- Step 3: Checking data quality
  - 3a: Change Var names
  - 3b: Check "null" values
  - 3c: Filter "Finished" survey only
- Step 4: Data reshape (Wide -> Long)
- Step 5: Saving as a CSV file
- *Review RMD file in the Google Drive*
  - *[Optional] Session 4: Qualtrics -> Tableau*
    - *Source*
      - *Rmd file*

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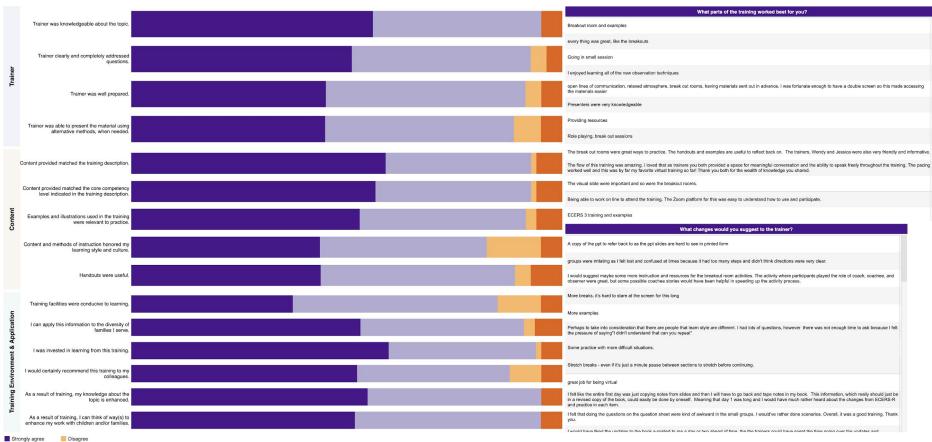
[Viz] Tableau Live Demo

- Issue(s)
  - Just importing data set from your long data -> Feeding into the Tableau workbook won't work
  - Tableau doesn't have documentation processes similar to RMD
  - Branding would take some time
    - Font: Cabin/Roboto for Cultivate Learning
    - Logo: Intranet (Transparent png preferred)
    - Color palette
      - Primary: Purple, Green, and Golden Yellow
      - Secondary (For likert-type scale)
        - Purple, Light purple, Golden Yellow, and Orange
      - *Reference branding guide on Intranet*
        - FYI: Museo Slab font doesn't work on Tableau

(All) ▼

Cultivate Learning
UNIVERSITY *of* WASHINGTON

Trainer

- Trainer was knowledgeable about the topic.
- Trainer clearly and completely addressed questions.
- Trainer was well prepared.
- Trainer was able to present the material using alternative methods, when needed.

Content

- Content provided matched the training description.
- Content provided matched the core competency level indicated in the training description.
- Examples and illustrations used in the training were relevant to practice.
- Content and methods of instruction honored my learning style and culture.
- Handouts were useful.

Training Environment & Application

- Training facilities were conducive to learning.
- I can apply this information to the diversity of families I serve.
- I was invested in learning from this training.
- I would certainly recommend this training to my colleagues.
- As a result of training, my knowledge about the topic is enhanced.
- As a result of training, I can think of way(s) to enhance my work with children and/or families.

Legend:
- Strongly agree
- Agree
- Disagree
- Strongly disagree

What parts of the training worked best for you?

- Breakout room and examples
- every thing was great, like the breakouts
- Going in small session
- I enjoyed learning all of the new observation techniques
- open lines of communication, relaxed atmosphere, break out rooms, having materials sent out in advance, I was fortunate enough to have a double screen so this made accessing the materials easier
- Presenters were very knowledgeable
- Providing resources
- Role playing, break out sessions
- The break out rooms were great ways to practice. The handouts and examples are useful to reflect back on. The trainers, Wendy and Jessica were also very friendly and informative.
- The flow of this training was amazing. I loved that as trainers you both provided a space for meaningful conversation and the ability to speak freely throughout the training. The pacing worked well and this was by far my favorite virtual training so far! Thank you both for the wealth of knowledge you shared.
- The visual slide were important and so were the breakout rooms.
- Being able to work on line to attend the training. The Zoom platform for this was easy to understand how to use and participate.
- ECERS 3 training and examples

What changes would you suggest to the trainer?

- A copy of the ppt to refer back to as the ppt slides are hard to see in printed form
- groups were irritating as I felt lost and confused at times because it had too many steps and didn't think directions were very clear.
- I would suggest maybe some more instruction and resources for the breakout room activities. The activity where participants played the role of coach, coachee, and observer were great, but some possible coachee stories would have been helpful in speeding up the activity process.
- More breaks, it's hard to stare at the screen for this long
- More examples
- Perhaps to take into consideration that there are people that learn style are different. I had lots of questions, however there was not enough time to ask because I felt the pressure of saying"I didn't understand that can you repeat"
- Some practice with more difficult situations.
- Stretch breaks - even if it's just a minute pause between sections to stretch before continuing.
- great job for being virtual
- I felt like the entire first day was just copying notes from slides and then I will have to go back and tape notes in my book. This information, which really should just be in a revised copy of the book, could easily be done by oneself. Meaning that day 1 was long and I would have much rather heard about the changes from ECERS-R and practice in each item.
- I felt that doing the questions on the question sheet were kind of awkward in the small groups. I would've rather done scenarios. Overall, it was a good training. Thank you.
- I would have liked the updates to the book e-mailed to me a day or two ahead of time, the the trainers could have spent the time going over the updates and

DASHBOARD TITLE

FILTERED DROPDOWN MENU

(All)

LOGO
Cultivate Learning
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QUAN: TRAINER WORKSHEET

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Training Environment & Application

QUAN: TRAINING ENVIRONMENT & APPLICATION WORKSHEET

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QUAL: SUCCESS

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Being able to work on line to attend the training. The Zoom platform for this was easy to understand how to use and participate.

ECERS 3 training and examples

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QUAL: NEED TO IMPROVE

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Strongly agree
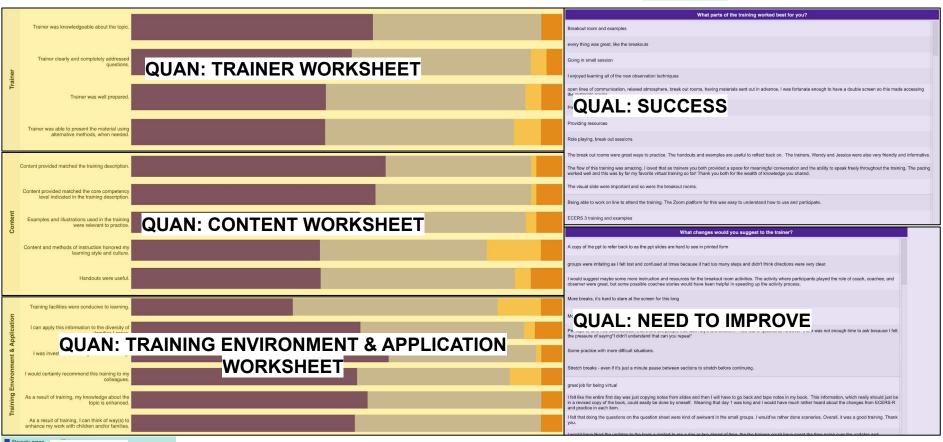Agree

LEGEND

[Viz] Tableau Live Demo

- Step 1: Loading data
- Step 2: Data review
- Step 3: Creating 5 + 1 Worksheets
  - Overall (How many training did we offer?)
  - Quan (Stacked bar charts | %)
    - Trainer eval
    - Content eval
    - Application eval
  - Qual (Comments | list)
    - Success
    - Needs to improve

- Step 4: Creating Dashboard
  - Proportion sketching
  - Worksheet positioning
  - Insert Title, Filter dropdown, Logo, & Legends
  - Final touches

Thank you!

감사합니다!