inSight User Guide

January 22, 2018

Table of Contents

Overview Description

Project Name	inSight
Launch Date	January 16, 2018
Users	GrantSolutions Users
BI Team Contact	bi@grantsolutions.gov

The purpose of the inSight Project is to enable partners within GrantSolutions to take large quantities of data generated from the grants lifecycle and present it in a meaningful and actionable way.

Glossary of Terms

Term	Definition
Action	An interaction with the view (i.e. filtering and highlighting)
Crosstab	A text table view
Worksheet/Sheet	A group of visualizations that consolidate individual pieces of information
Dashboard	A collection of several worksheets arranged on a single page
Tooltip	Data details that appear when the cursor hovers over a dashboard element

Server Icon Reference Sheet

1. ⬅ Undo

Undo the most recent change you made.

2. ➡ Redo

Redo the most recent change you decided to undo.

3. ⬅ Revert

Refresh the dashboard to the original state before any of your changes were made.

4. Refresh

This will refresh the dashboard with new data if you have had your report open for an extended period of time.

5. Pause

Click this button to pause the data from refreshing and click it again to resume live data.

6. Download

If you wish to download the dashboard as an Image, Data snapshot, spreadsheet, or PDF, select this button and choose from the drop-down list of options.

7. * View: Original

If you have applied filters and wish to keep them saved for a specific view, simply click this icon and save the view with a corresponding name.

8. Alert

If you select a measurable axis on any of the charts you can then select this icon and create an alert which will be sent to your email.

9.
If you know every Monday you will need to see this report, you can select the subscribe button to receive an email on the selected days with a current state view of the Dashboard.

10.
By clicking this, you can enlarge the Dashboard to fit the whole size of your monitor.

Frequently Asked Questions

11. Do I have to download any software to use the dashboard?

There is no software needed.

12. Do I need to remember a new username to access Tableau Server?

No, due to Single Sign-on from Grant Solutions.

13. I am getting an error message when trying to log in and I am using the correct password, who do I contact?

Please contact your analyst or PPD.

14. Can I save my own view of the dashboard?

If you want to keep any filter that you have applied to a Dashboard, select the View: icon. Then, type the name of the view you want to save and click the save button. The option to visit your saved view will be available whenever you are on the corresponding dashboard.

15. Can I share my view of the dashboard with other participants?

In order to keep Tableau Server running efficiently, we are not allowing participants to share views they create.

16. I have a new idea on how to display the data differently, how can I create it?

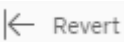Please email your analyst or PPD.

17. I have logged into my account, now what?

You will select the folder labeled "inSight". Then, you will select one of the dashboards available. Once you are there, you can start exploring the data.

18. What do all these icons mean on the top row of the dashboard?

Please refer to the Server Icon Reference Sheet.

19. I have applied a filter on the dashboard and I do not know where, how do I reset it?

Please click the ⟵ Revert icon and it will reset the workbook to its original state.

20. The data is not matching, who do I tell?

Please contact your analyst or PPD.

21. Why does my dashboard take so long to load?

We are currently monitoring and analyzing load time between dashboards. If you notice a dashboard taking a significant amount of time to load, please contact your analyst or PPD.

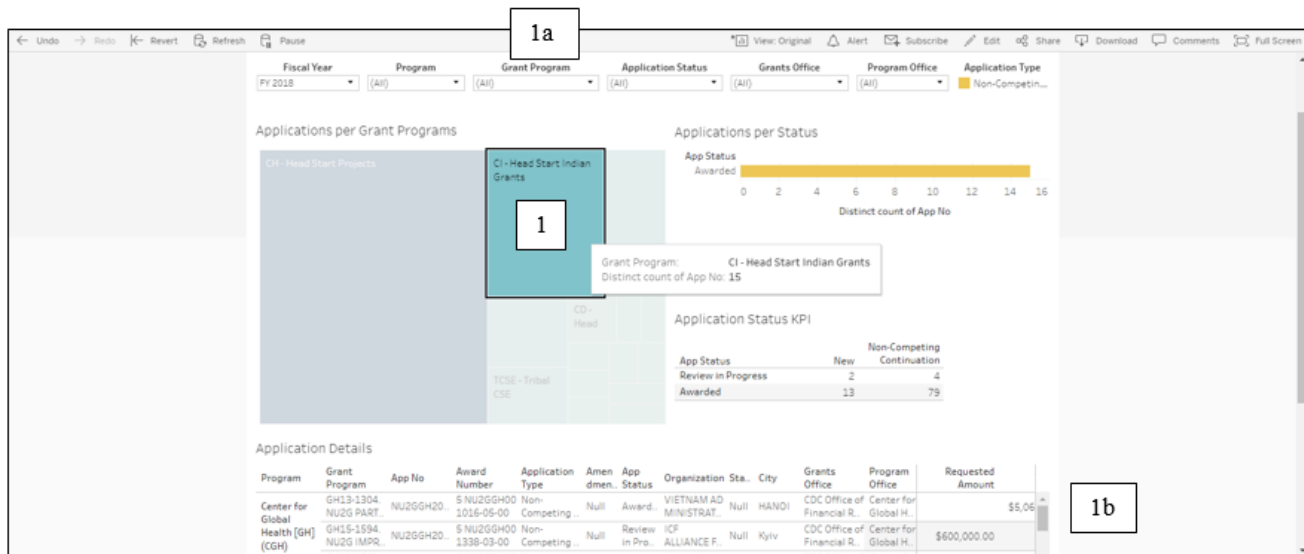# How to View Dashboard Details as an Excel Spreadsheet

Figure 1: Dashboard

For this dashboard, each tile represents an individual Grant Program. The size and color of the tile represents the number of Applications assigned to it. By hovering over a Grant Program, you will see the tooltip displaying the full Grant Program name and number of Applications.

Each Bar in the Bar Chart represents the number of Applications in the corresponding status. Each bar is further broken down by color based on the Application status. If you click on the status, it will filter all the Grant Programs from the tree map and populate the details section below.

The Key Performance Indicators (KPI) are summaries of the information displayed in the Tree Map and Bar Chart. The KPI will update as you apply the filtering options from the previous numbers. The Application Status KPI is a total of each bar from the bar chart. The Application decision KPI is a summation of all the colors across statuses.

1. Select the relevant Grant Program from the Tree Map.

   a. If you need to select more than one Grant Program, do so by selecting from the drop-down filter on the top of the page.

   b. Application Details will populate the bottom half of the screen.
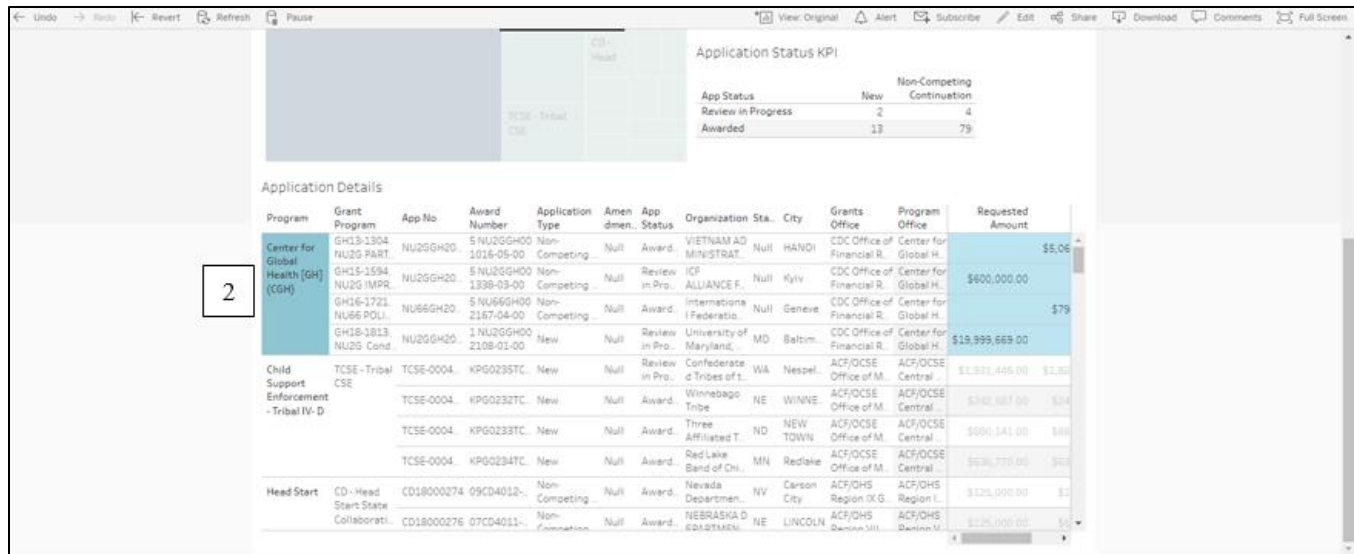
Figure 2: Dashboard - Application Details

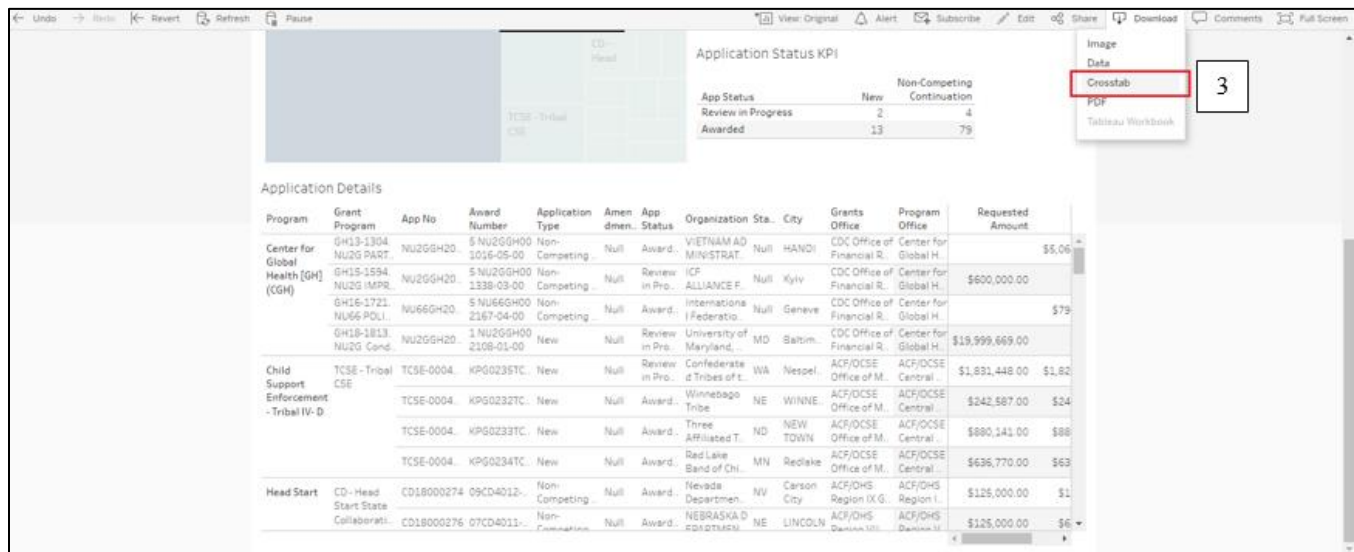2. Click on any portion of the Application Details

Figure 3: Dashboard toolbar Download - Crosstab menu

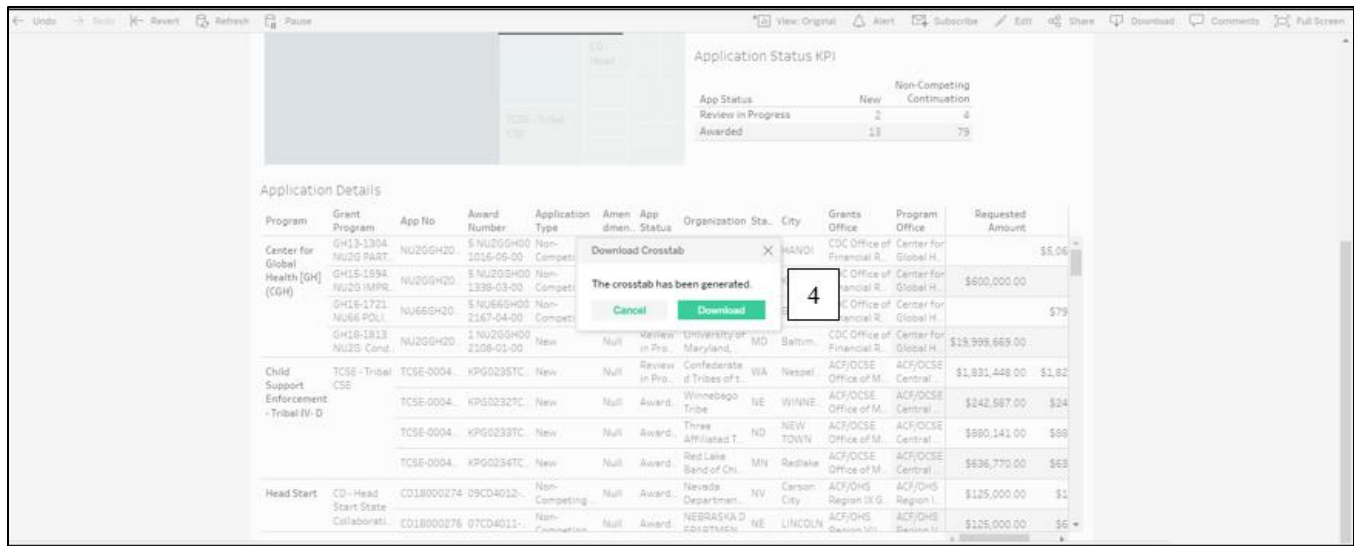3. Select Download on the toolbar, then the "crosstab" option.

Figure 4: Download Crosstab message - Download button

4. Click the "Download" button to view data in an Excel spreadsheet.

If you wish to view data from the Tree Map, Bar Chart, or Status KPI as a spreadsheet, select an element from any specific area. Select one of those areas so Tableau can identify what you want to print, and then follow steps 6 and 7.

How to Use Custom Views
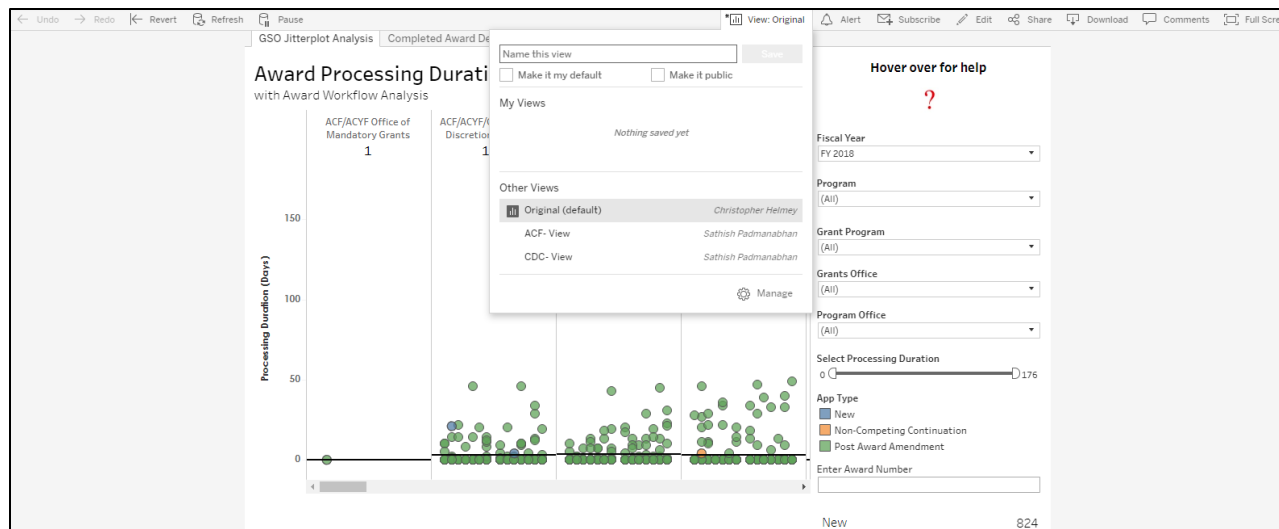
SAVE A CUSTOM VIEW

Figure 5: Toolbar - View option

1. Open the individual view that you want to customize.

2. Filter the data, change sorting, select specific marks, zoom in or out, or make any other modifications.

3. In the toolbar, the View option now includes an asterisk, indicating that the view has changed.

4. Click **View** in the toolbar.

5. Enter a name for the custom view. Then select whether you want it to be the default view you see, and if it should be public so other users can access it.

6. Click **Save**.
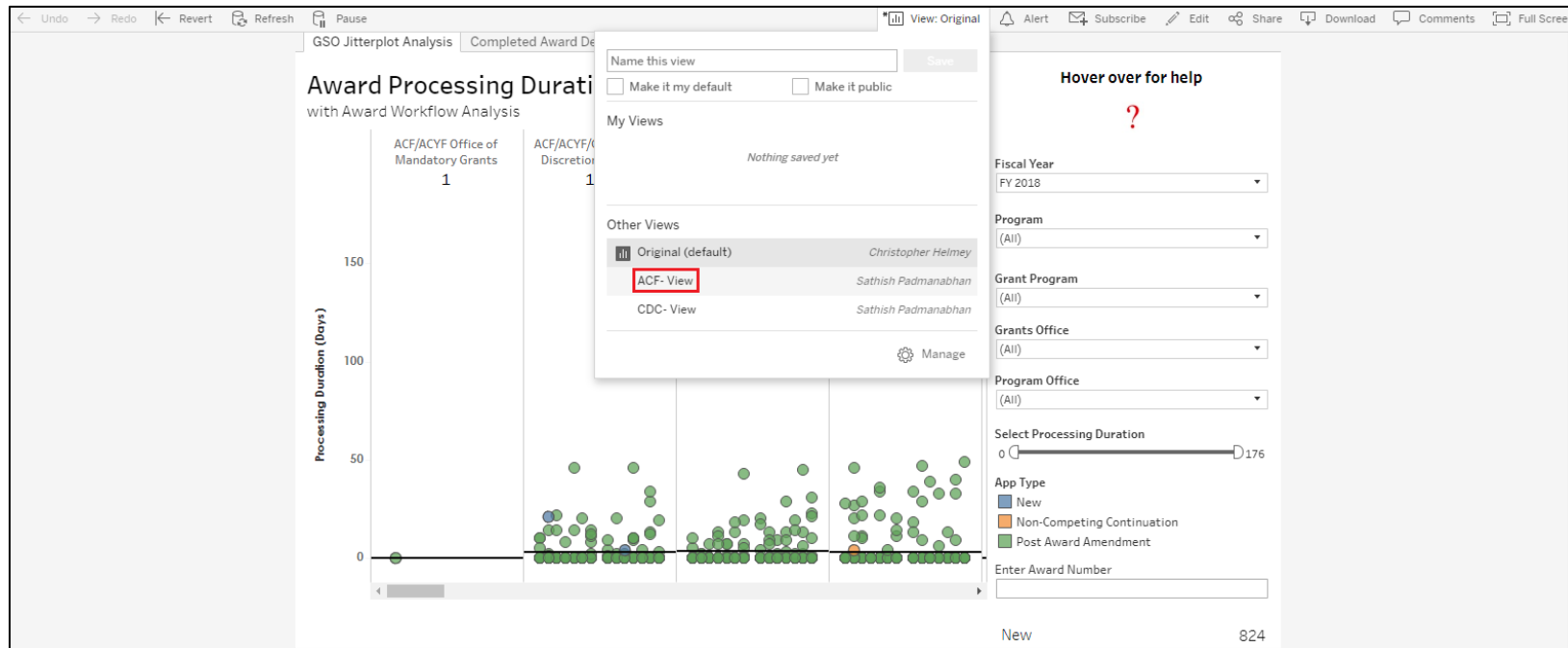
CHOOSE A DIFFERENT CUSTOM VIEW

Figure 6: Toolbar - View and Other Views section

1. Click **View** in the toolbar.

2. The currently selected view appears with a gray background.

3. Click another view to display it.

4. Custom views that you have saved appear under **My Views**. The original view and views created by others appear under **Other Views**.

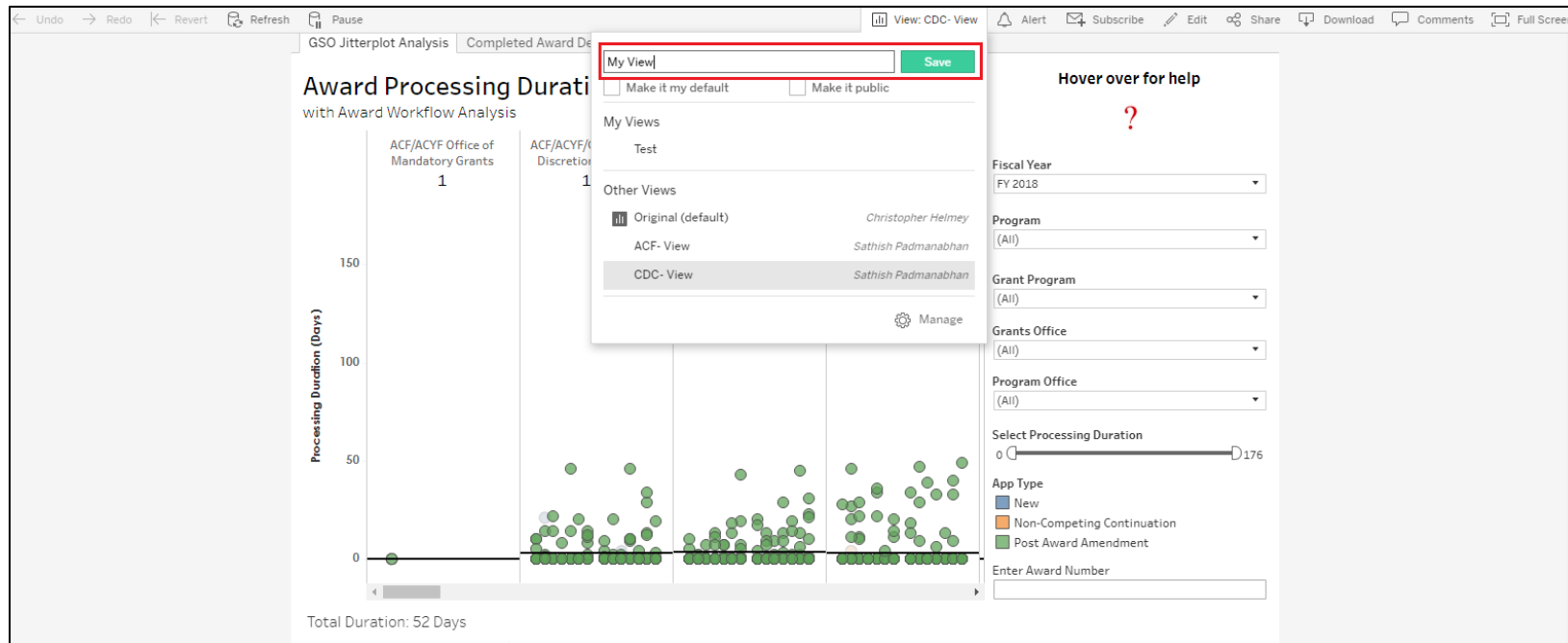CREATE YOUR OWN VIEW BASED OFF AN EXISTING ONE

Figure 7: Toolbar - View - Name this view

1. Click **View** in the toolbar.

2. The currently selected view appears with a gray background.

3. Click another view to display it.

4. Create your own custom view by selecting "Name this view". Custom views that you have saved appear under **My Views**.
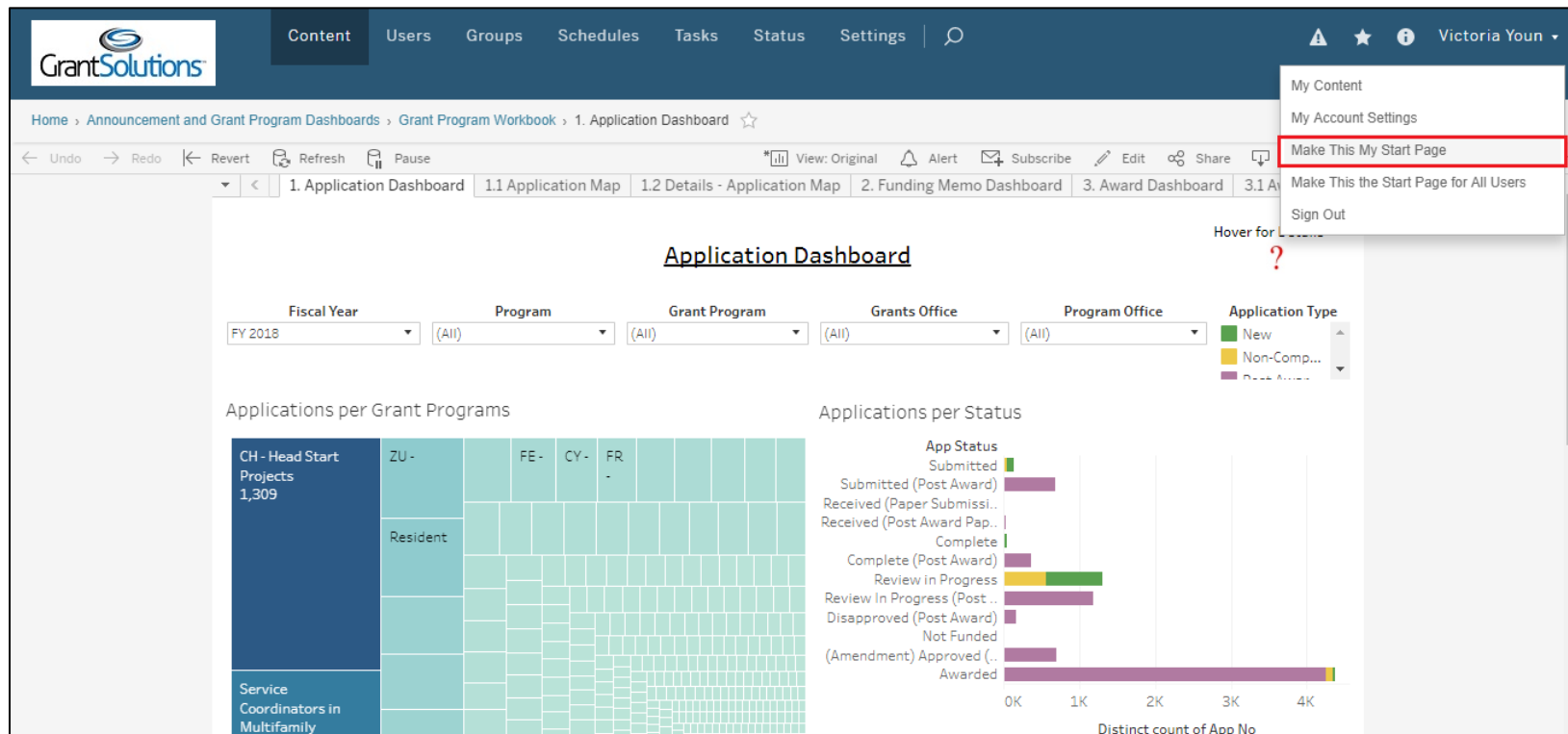
How to Select Your Own Default Landing Page

Figure 8: User name - Make This My Start Page option

1. Navigate to the page you want to be the default landing page.

2. Click your name on the upper right corner of the page.

3. Select **Make This the Start Page for All Users**.