

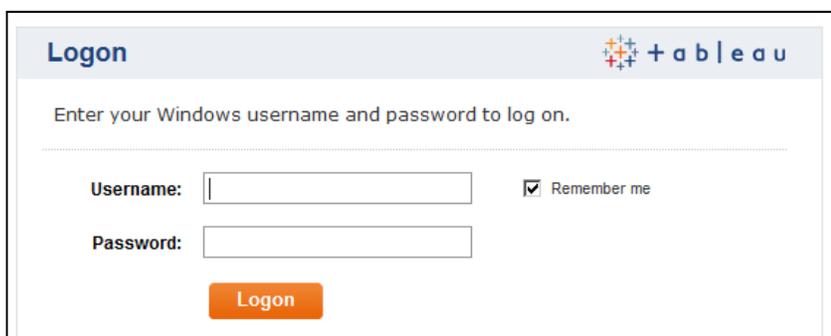
# Quick Start to Course Evaluations in Tableau

Updated December 2013

## Log-in

If you will be a regular user of course evaluation reports, consider bookmarking [tableau.oit.duke.edu](http://tableau.oit.duke.edu). This is your point of access to the course evaluation reports starting with the Summer II 2013 process. Report PDFs generated for terms Spring 2005 through Summer I 2013 will continue to be available through [assessment.aas.duke.edu/evaluations](http://assessment.aas.duke.edu/evaluations).

You will log-on with your netID and passcode.

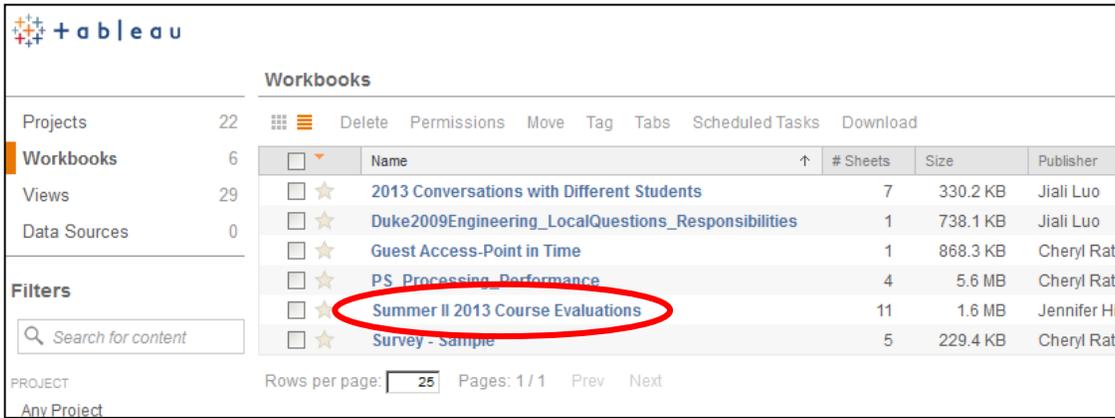


Faculty will be authorized to view evaluation results for the courses in which they taught, as well as relevant comparison reports for the department, for all divisions, and for Trinity College overall.

Department-level users (e.g., Directors of Undergraduate Studies, authorized staff assistants) are pre-assigned membership in a group for their department or program. If you need to request a change to the group of individuals authorized to view department-level reports, please continue to submit such requests here: [http://bit.ly/CE\\_access](http://bit.ly/CE_access).

## Navigating Tableau reports

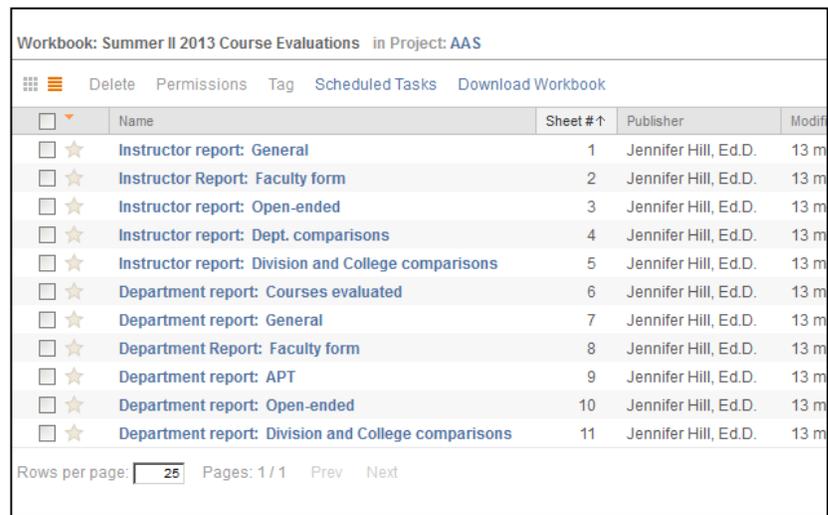
Upon successful log-in, you will see a menu of the workbooks to which you have been given access. For example, the title of the workbook for Summer II 2013 course evaluations is titled *Summer II 2013 Course Evaluations*. Click on the Tableau icon or the *Workbooks* link in the upper left at any time to return to this menu.



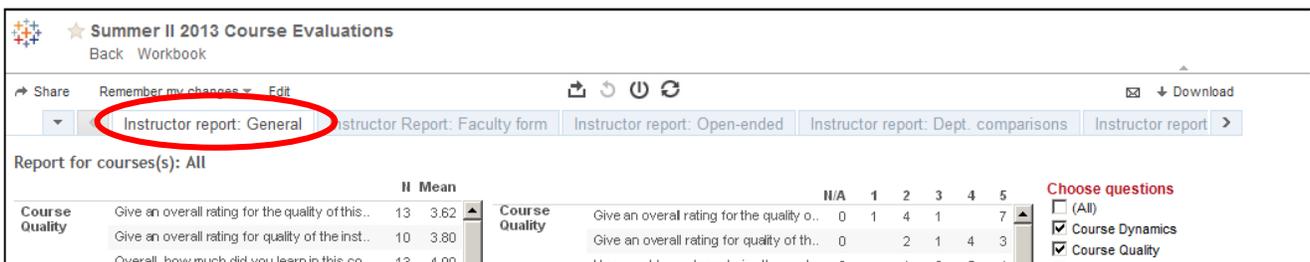
After clicking on the desired workbook link, for example *Summer II 2013 Course Evaluations*, you will see all or a subset of the following reports (*aka* dashboards).

These are the course-level reports to which individual instructors have access.

These are the reports to which department users (e.g., staff assistants) have access.



Make sure you're in the course evaluations workbook for your preferred term, then click on any of the reports. Right away, notice that there's a menu of reports along the top of the screen. You can choose which report (*aka* dashboard) you wish to use, either from this menu or by returning to the main Tableau homepage.



Note that you no longer have access to separate documents for individual courses or departments. There is only one report interface, containing all of the results to which you have access. Tableau allows you to filter or separate the results, such as by course.

## Understanding the content of the reports

In general, the reports give you most of the information you used to obtain from the PDF reports: means and frequencies across all of the questions on the student form. However, you have the following additional capabilities in Tableau:

- You can select or deselect any group or groups of questions. The standard five question groups pertain to quality of the course, course dynamics, quality of instruction (instructor 1 and, if applicable, instructor 2), and the Trinity College learning objectives. Additional question groups available for use pertain to the Modes of Inquiry (plus Quantitative Studies) that may pertain to the course under review.
- You can select or deselect a course or courses from this view. This is especially helpful if you wish to aggregate the results across several or all of your classes.
- You can select or deselect particular groups of students by class standing. In the future, it may be possible to make available additional student-level parameters (e.g., major) by which you can sort the data.

All of these optional changes impact the content of the tables and figures in this workbook, and you will see the content update automatically.

The screenshot displays the Tableau interface for 'Summer II 2013 Course Evaluations'. The main data table shows mean scores for various question categories. The 'Choose questions' panel on the right allows for selecting or deselecting question groups. The 'Choose course(s)' panel allows for selecting or deselecting courses. The 'Choose students' panel allows for selecting or deselecting student groups. Below the table, a horizontal bar chart visualizes the mean scores for each question category. A small summary table is also present on the right side of the bar chart area.

| Category                     | Question  | Mean |
|------------------------------|---|------|
| Course Quality               | Give an overall rating for the quality of this... | 3.62 |
|                              | Give an overall rating for quality of the inst... | 3.80 |
|                              | Overall, how much did you learn in this co...     | 4.00 |
|                              | How would you characterize the workload...        | 3.92 |
| Course Dynamics              | The course assignments (papers, projects...       | 2.77 |
|                              | The course expectations and requirement...        | 2.85 |
|                              | The course materials (readings, textbooks...      | 2.85 |
|                              | The course was intellectually stimulating a...    | 2.54 |
|                              | The course was well-structured and organi...      | 2.92 |
|                              | The grading procedures were appropriate...        | 2.46 |
| Instructor 1 (Primary)       | Instructor 1 had a thorough knowledge of t...     | 3.08 |
|                              | Instructor 1 was enthusiastic about the co...     | 3.00 |
|                              | Instructor 1 explained material clearly and...    | 3.38 |
|                              | Instructor 1 was well prepared.                   | 3.23 |
| Instructor 2 (if applicable) | Instructor 2 had a thorough knowledge of t...     | 2.00 |
|                              | Instructor 2 was enthusiastic about the co...     | 3.00 |
|                              | Instructor 2 explained material clearly and...    | 3.50 |
|                              | Instructor 2 was well prepared.                   | 3.50 |

Select or deselect groups of questions.

Select or deselect courses.

Select or deselect groups of students.

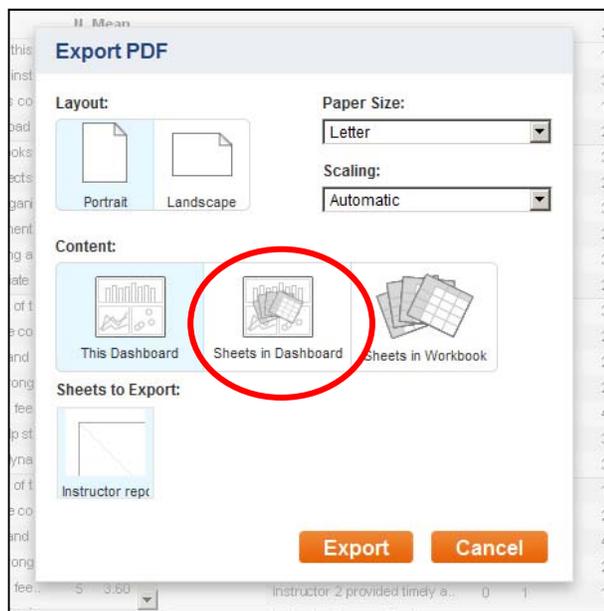
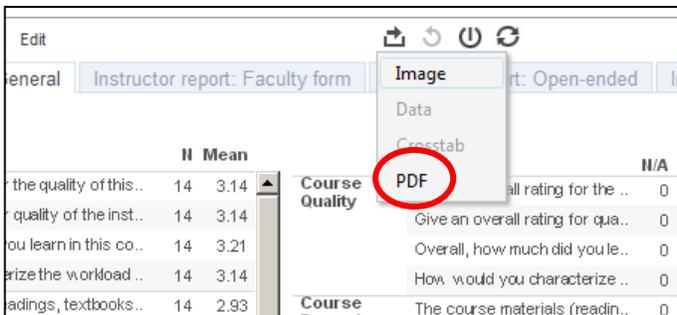
## Using, printing, exporting from Tableau

Tableau gives you more options for using and exporting the contents of your reports. CAUTION: For all of these options, please be aware that Tableau will print or export the content of the tables or figures *as you have defined them*. As you use these products, be mindful of any filters you may have applied (class size, or student class standing), and the departments and/or courses the reports represent.

### Printing the screen as a PDF

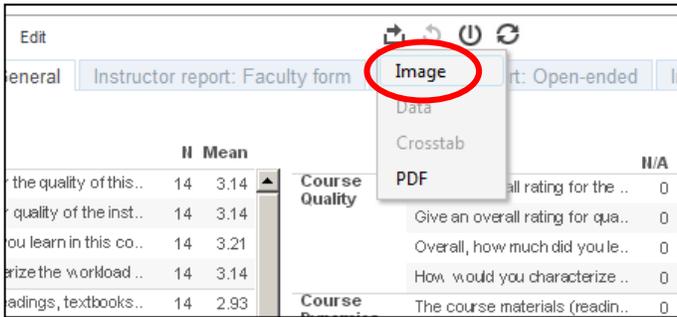
You can print a simple PDF of the screen by clicking on the Export icon (see the red circle below), and select PDF. A wizard will walk you through the short export process. You may choose to export one of the following.

- (1) *This Dashboard*: provides a PDF of exactly and only the contents of the screen. If you've selected multiple question categories, such that your tables and figure require scroll bars, the PDF will truncate some of the content.
- (2) *Sheets in Dashboard*: provides a multi-page PDF of the full tables that feed the screen you're looking at, without constraining the content of the tables. **This is the recommended option.**
- (3) *Sheets in Workbook*: provides a multi-page PDF of all of the worksheets that go into the course evaluation process generally, many of which will be void of data in your view due to lack of user privileges. Also, if your view of the tables and figure require scroll bars, the PDF will lose some of the content. **This option is not recommended.**



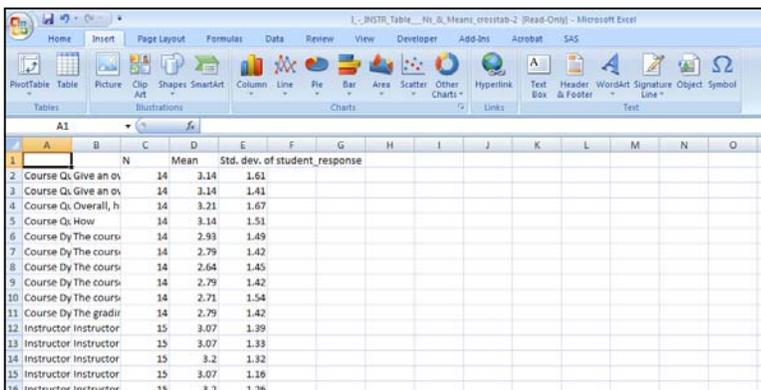
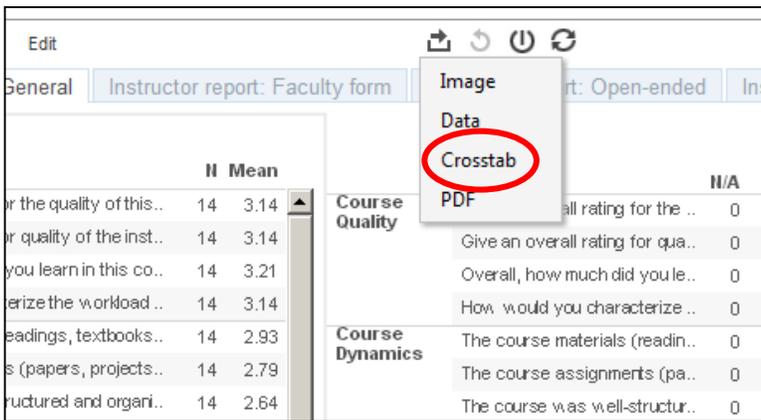
## Printing the screen as an image

You may need a quick screen capture to paste an image into an existing document or even an email. To get an image of the screen, click on the Export icon (see the red circle below), and select Image. Tableau will prompt you to download the image, and it will open in your default image viewer. From there, you can copy and paste it into the document of your choice.



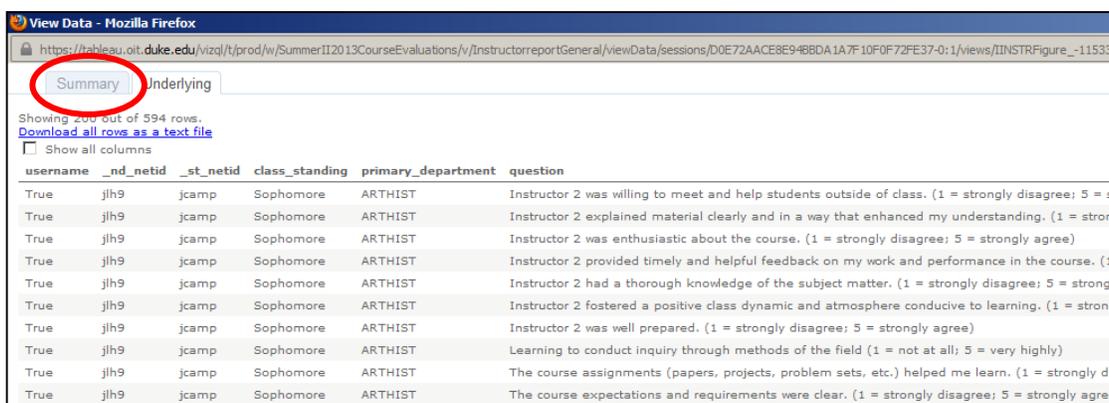
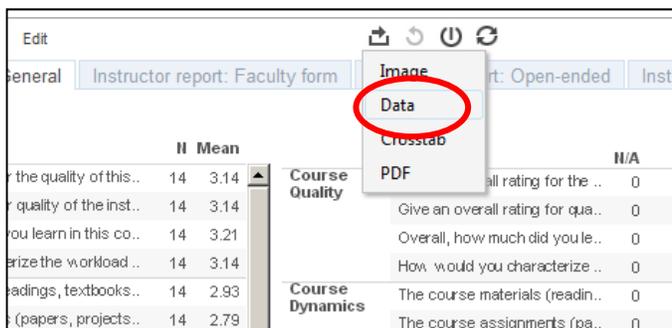
## Exporting the contents of a table to Excel

To be able to export the table contents, make sure that you've clicked the chosen table itself; a thin gray border will appear around the table. When the table is selected, a new option will appear in the Export menu: Crosstab. "Crosstab" is short for cross-tabulations. Tableau will prompt you to download the table, and you can choose to open it in Excel or save it to a location of your choice.



## Access to the raw data

If you click in a table or figure, such that the thin gray border appears, you may notice another option in the Export menu: Data. Once one selects the Data option, the results appear in a new window, with two tabs at the top of the screen. The default view is “Summary”.



The Summary view provides a more detailed table of the selected data. (Though it does not provide any additional variables or fields.) It may be downloaded as a text file. The second “Underlying” view, however, is the raw data that populate the report. You are able to download these raw data, however they may be of limited analytical use.

## Need help?

If you have technical problems accessing the course evaluation questionnaires (student or faculty) in SISS/ACES/STORM, please contact the OIT Help Desk at 919-684-2200. Note that evaluation forms typically are available only for two weeks prior to the last day of class. Exceptions exist for select graduate-level classes and study abroad classes.

If you have general questions about the development or use of course evaluations, please contact the Office of Assessment, Trinity College, at [assessment@duke.edu](mailto:assessment@duke.edu) or 919-668-1617.

If you have technical questions about the use of Tableau, please contact the Office of Assessment, Trinity College, at [assessment@duke.edu](mailto:assessment@duke.edu) or 919-668-1617.