



VILLANOVA
UNIVERSITY
IGNITE CHANGE. GO NOVA.®

DATA INSIGHTS

User Guide

Version 1.1 (June 2022)

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Introduction

Background

Welcome to Villanova University's *Data Insights* Platform. Launched in June 2022, this platform is a central repository that houses curated student admissions, financial aid, enrollment, course registration, and student success and completions data, as well as faculty data with advanced reporting and analytics capabilities. *Data Insights* platform is intended to support a data driven approach to the decision-making process, as well as allow fast and intuitive access to data to aid ad-hoc reporting, as needed.

Requesting Access

Data Insights access has already been set-up for many staff members as part of the launch. If you are not part of the initial launch group, as a new user of *Data Insights*, you will need to request access to the system. Access can be requested by completing a form on the ODSDI website.

Levels of Access to Request

There are two primary types of licenses that you may request. Most users will be provided a **Tableau Viewer** License. The Viewer license will allow you to view the core University dashboards that you have been granted access to. Within each dashboard, you will have the ability to filter the data and save the result. Depending upon individual dashboard restrictions, you will also be able to download an image of the dashboard or as a PDF or PowerPoint.

Other users requiring enhanced access to the platform to perform their job responsibilities will be provided **Tableau Explorer** license access to *Data Insights*. The Explorer level allows the same permissions as the Viewer access, but with enhanced ability to interface with the underlying data models and build ad-hoc dashboard/reports, per their specific requirements. Any new dashboard to be published and shared will need to be coordinated with ODSDI to ensure appropriate access is set-up.

In addition, a small group of users responsible for overall platform and back-end data management will have **Tableau Creator** license. The Creator license will provide the same access to build dashboards as the Tableau Explorer license. However, the Tableau Creator License will allow additional capabilities in merging and joining additional data sources as well as the ability to manage user access and distribution of dashboards.

Following FERPA Guidelines and in consultation with the respective Data Trustees, with regard to your individual job role, the Office of Decision Support and Data Integrity will allocate Tableau licenses and the associated level of access you will receive.

Logging into Data Insights

Data Security / Connect to VPN (Gateway)

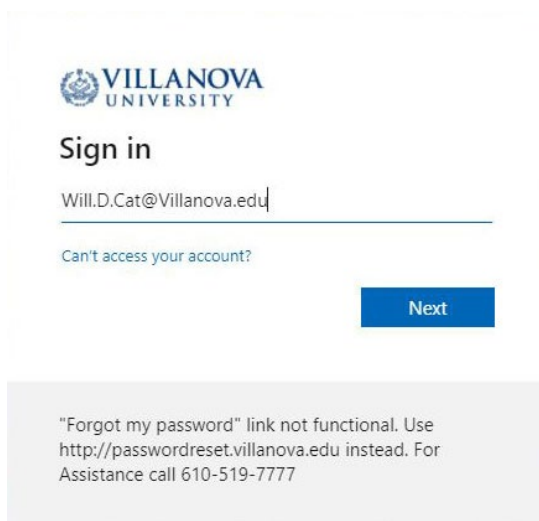
Data security is key to protecting confidential information of students and faculty stored in the *Data Insights* platform, hence accessing the platform will follow enhanced security protocol as is true for any other data systems of the University. In addition to the role-based security, access to the platform is also protected by only allowing login from within the Villanova University Network. If using ethernet connection, you can login using your VU SSO credentials and DUO authentication on your mobile device. If using WiFi (VUMobile) or off-campus, please login to VPN using Pulse and DUO authentication before logging into the platform. Detailed instructions are also available at:

https://www1.villanova.edu/content/villanova/unit/security/Duo2FactorAuth_secure.html Additional information on setting up Gateway VPN on your device is available on UNIT website <https://www1.villanova.edu/villanova/unit/networkphoneconnect/gateway.html>

As a user of *Data Insights* platform, you are required to follow best practices to protect Villanova University data as outlined by UNIT and Data Governance.

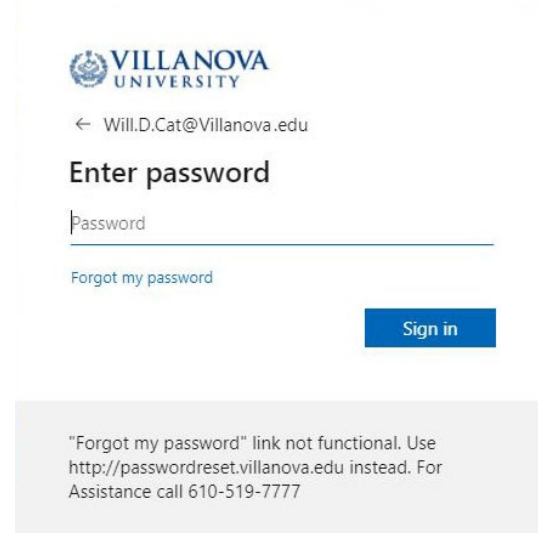
Logging In

Data Insights is a web-based application and can be accessed by navigating to <https://datainsights.villanova.edu>. When you load this page, you will be presented with a login screen. Use your Villanova email address and password to login, ie Will.D.Cat@Villanova.edu.



The screenshot shows the Villanova University logo at the top left. Below it is the text "Sign in". There is a text input field containing "Will.D.Cat@Villanova.edu". Below the input field is a link that says "Can't access your account?". At the bottom right of the form is a blue button labeled "Next".

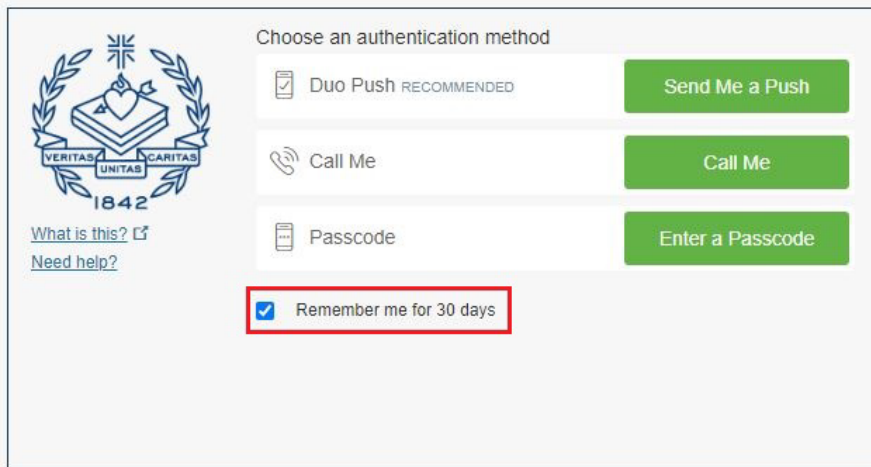
"Forgot my password" link not functional. Use <http://passwordreset.villanova.edu> instead. For Assistance call 610-519-7777



The screenshot shows the Villanova University logo at the top left. Below it is the text "VILLANOVA UNIVERSITY". Below that is a back arrow and the email address "Will.D.Cat@Villanova.edu". Below that is the text "Enter password". There is a text input field containing "Password". Below the input field is a link that says "Forgot my password". At the bottom right of the form is a blue button labeled "Sign in".

"Forgot my password" link not functional. Use <http://passwordreset.villanova.edu> instead. For Assistance call 610-519-7777

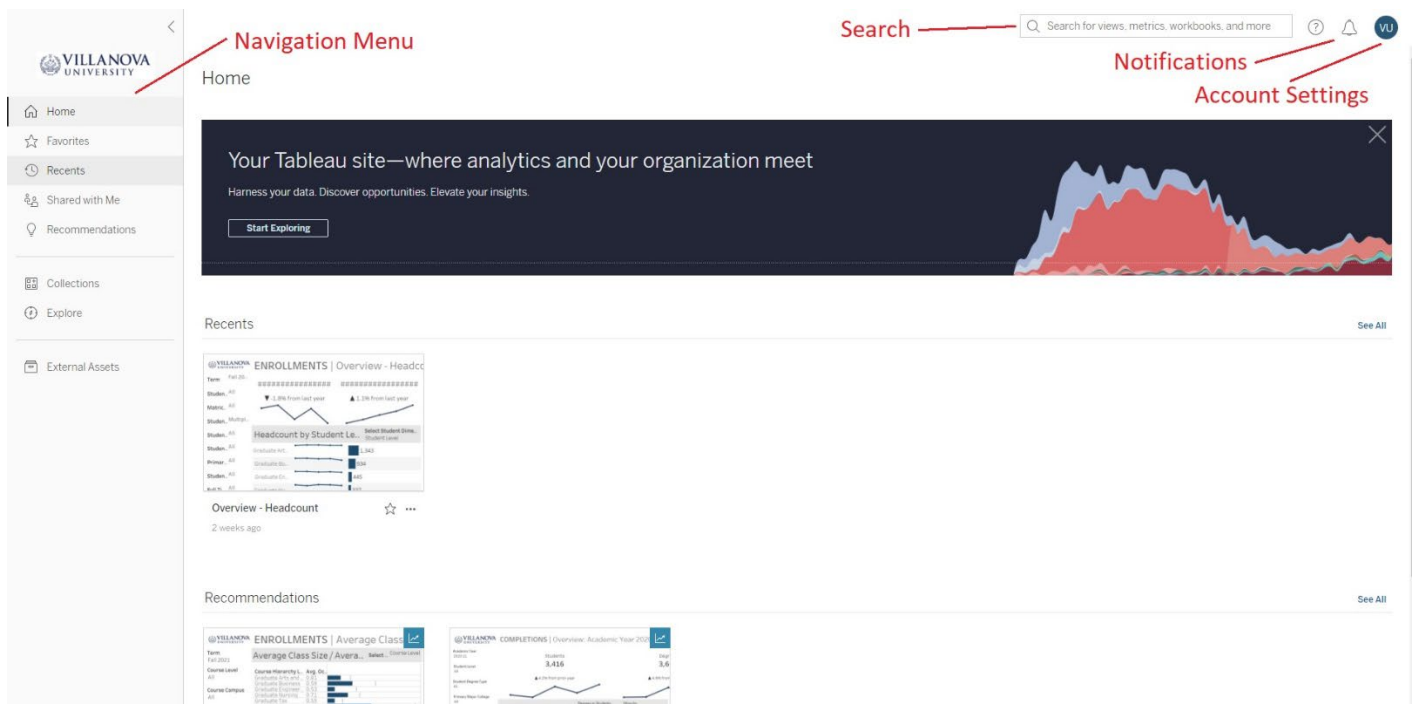
After you enter your credentials, open the DUO app on your mobile device and allow the connection. You can check off the “Remember me for 30 days” so you do not have to authenticate connection each time logging in.



Navigation

Home Page

Upon logging in, you will land on the home page. The home page will present your options for navigation such as viewing favorites, shared dashboards, and explore all available content. A search function and link to account information is also available.

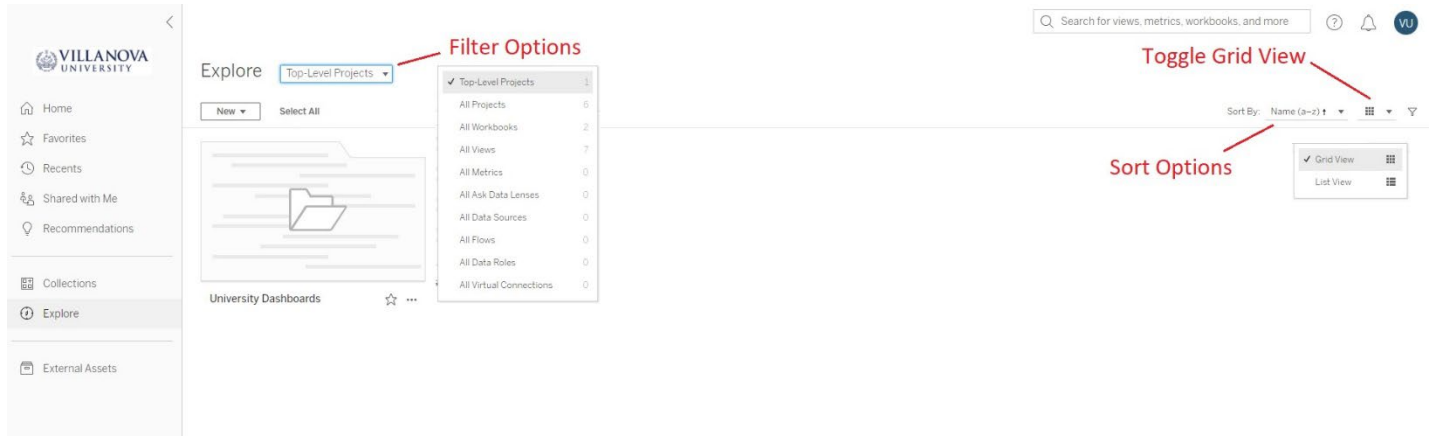


Navigation Menu

Home

This is the *Data Insights* Home Screen landing page. From here, you can navigate to open recent dashboards, see your favorites, explore available dashboards, or search for specific items.

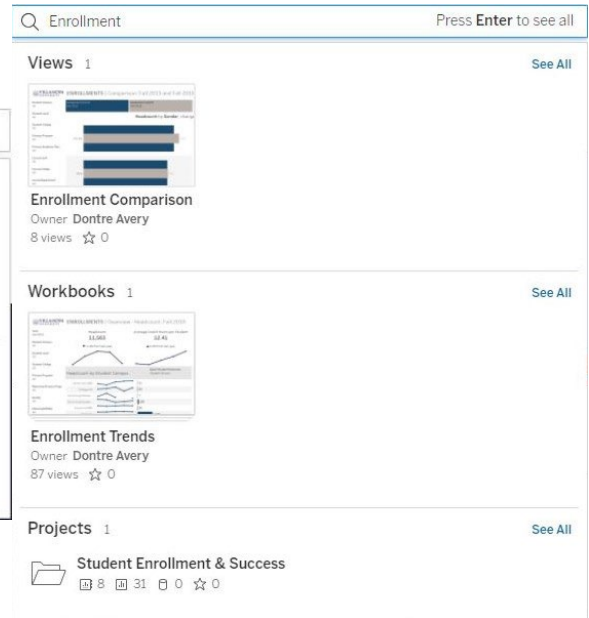
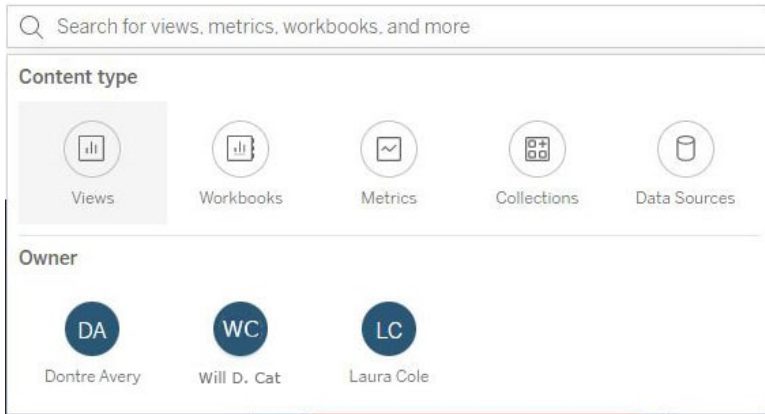
Explore



The explore tab will allow you to explore all of the dashboards available to you. The dashboards are organized into folders based upon the data being used. IE, Admissions, Faculty, Student Enrollment, etc. You will notice there is a drop down menu that will allow you to filter the view to see all dashboards at once, or be able to view all available worksheets. You can also toggle between a list view and grid view as well as sort.

Searching

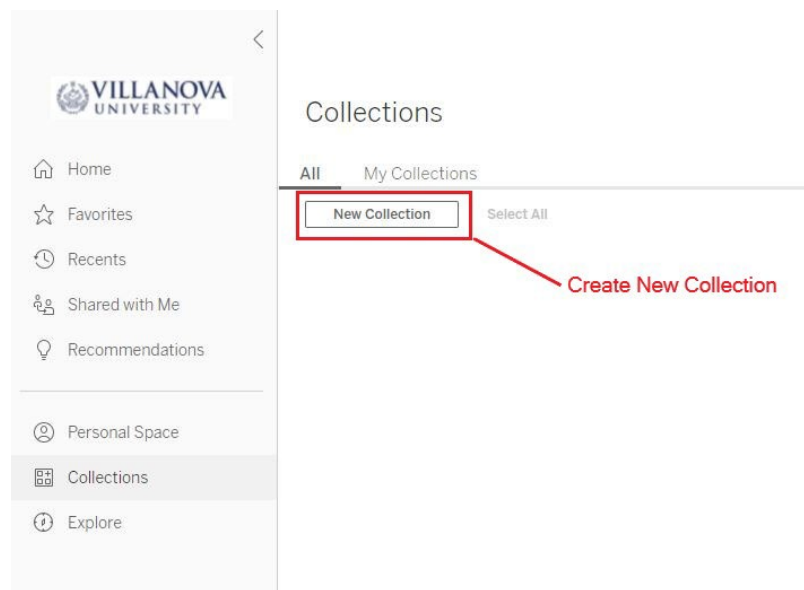
The Search bar is available on all screens of the Data Insights platform. When you click on the Search bar, you will notice a few recommended search options. These options include to search by Owner, or search by type of dashboard. You may also type in a specific keyword such as Enrollment. You will then be presented with a list of all documents available sorted by document type such as workbooks, worksheets, projects that are related to the search terms you have entered.



Collections

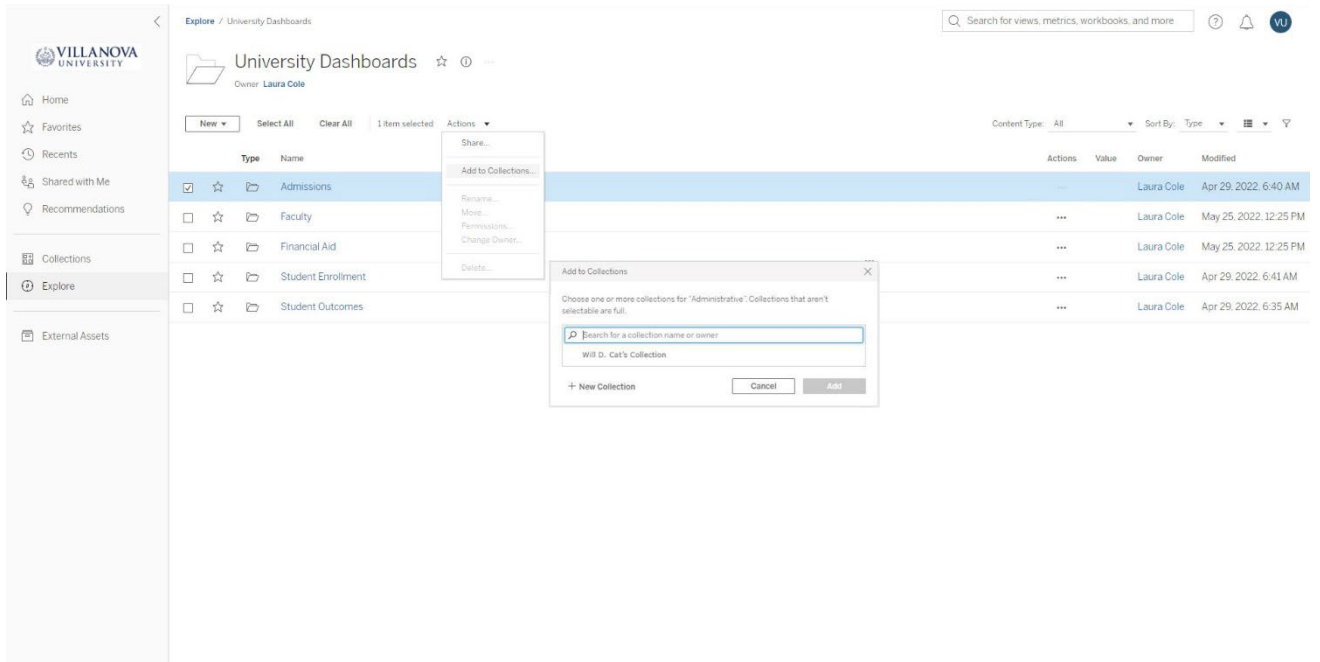
New Collection

The Collections tab is a place where you have the opportunity to create your own folders to organize the available dashboards in a way that works best for your workflow. You can create a new collection by clicking New. A window will pop up where you may enter a name for your new collection.



Adding to Collection

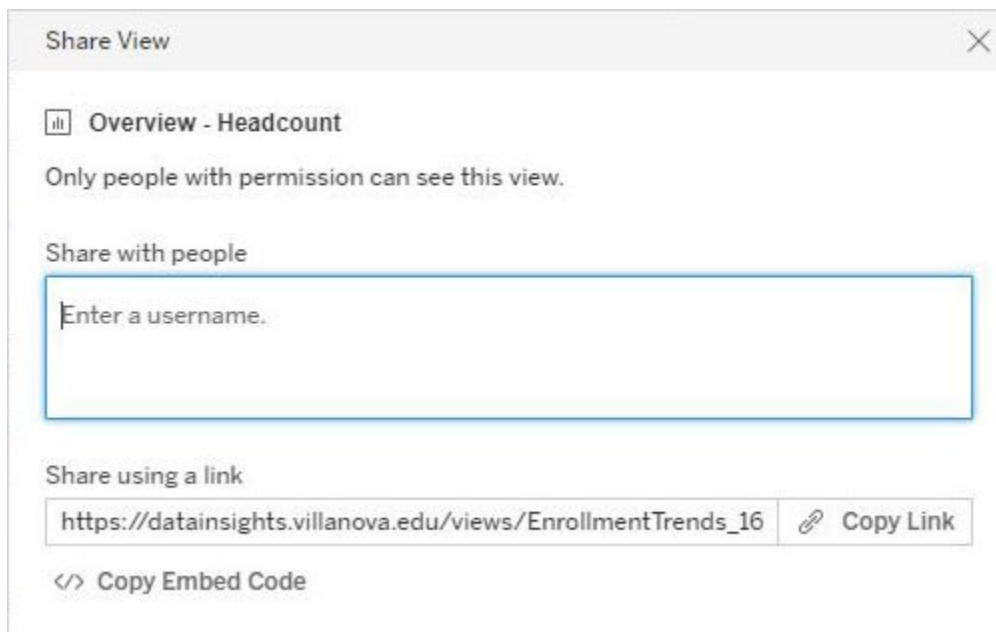
To add an item to a Collection, navigate to the Explore screen and find the item you wish to add. Select the checkbox next to the item and find the drop-down menu at the top of the list. From this menu you will have the option to add to Collection.



Sharing

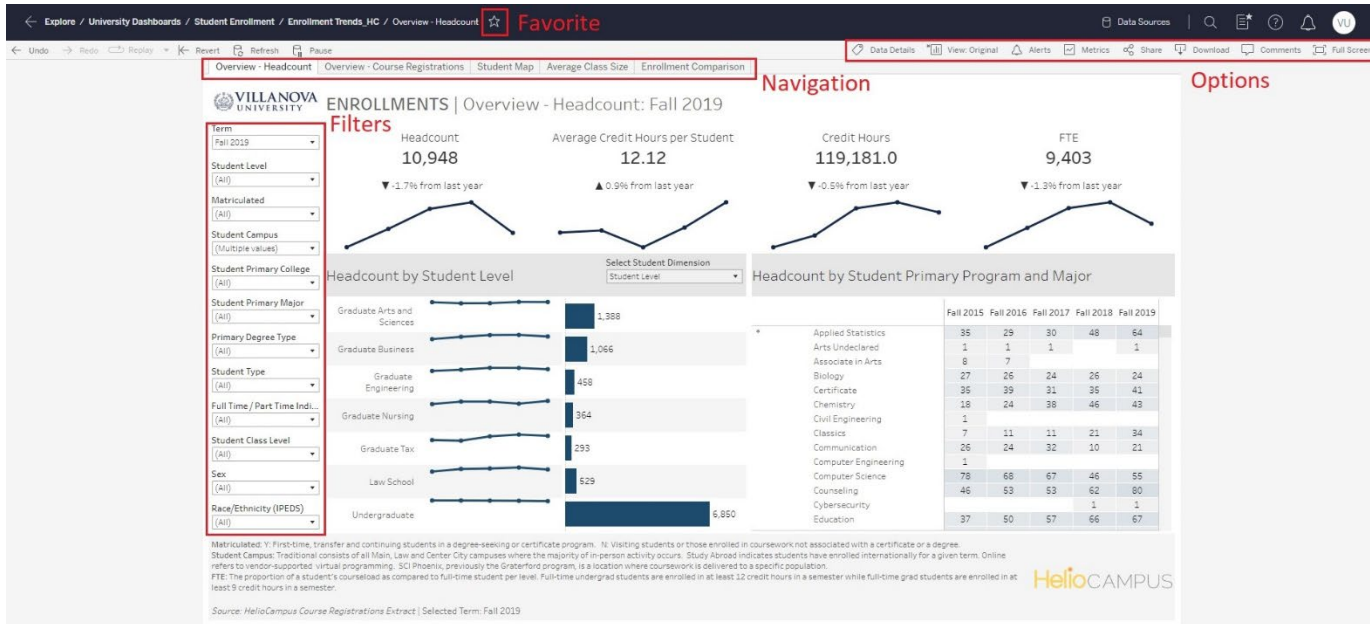
You may share dashboards with other users. When you see a dashboard, you wish to share, select that item and utilize the dropdown menu to select “Share”. You will need to type the email address of the user you wish to share with. Please note that the person you wish to share the dashboard with will only be able to see the dashboard if they are authorized with permission to view the dashboard.

If the user does not have permission and needs access to view the dashboard, please reach out to the Office of Decision Support and Data Integrity with the request for access. The request will be reviewed based upon University Data Governance policy.



Views

Navigation



All of the Dashboards feature several elements in common. This allows for an easy and intuitive navigation going from one dashboard to the next. All Dashboards will feature a set of tabs at the top for different views of the data within the dashboard. Each tab will have a HELP button to provide information and context to the data being displayed

Tabs

You may navigate from one page of the Dashboard to the next simply by clicking on the tab you wish to navigate to. You can go back to the previous page by clicking that tab.

Selecting Filters

Ethnicity(IPEDS) Graduate

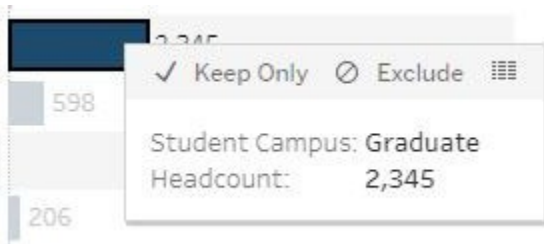
- (All)
- American Indian or Alaska Native
- Asian
- Black or African American
- Native Hawaiian or Other Pacific Islander
- White
- Two or more races
- Nonresident Alien
- Hispanic
- Unknown race and ethnicity

Cancel Apply

Each Dashboard will feature a set of filters along the side of the page. These filters will vary depending upon the specific data in the dashboard, but you will generally see filters for data fields such as Year, Sex, Race/Ethnicity, Degree, Student Level, College, etc. Depending upon the dashboard, some of the filters may

be presented as a single value dropdown. Simply select the value you wish to filter by. The other type of filter is a Multi-Value Dropdown. With this filter, deselect “All” and proceed to select the specific items you wish to be included in your filter. Once your selections are made, click “Apply” button. You may also notice some charts will have their own filters available to adjust the view of that specific chart.

Additionally, data points may be selected and present an option to Keep Only, or Exclude that specific data point.



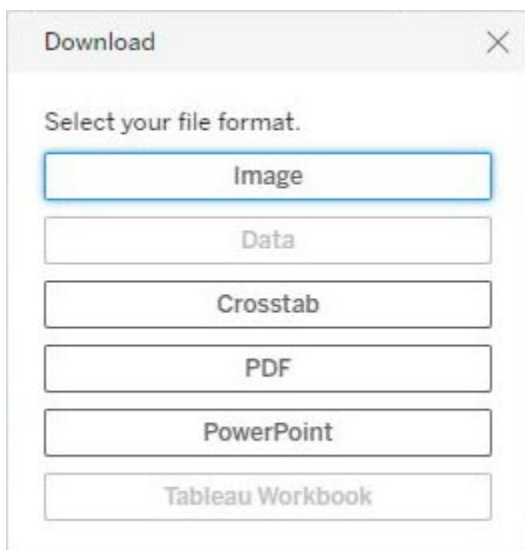
Saving Favorite

Simply click the Star on the top of the page to add dashboard to Favorites.

Sharing

The Share button is available and allows you to share the specific visualization with other users. The user you wish to share the dashboard with must have permissions set to allow access to the dashboard. If the user does not have permission and needs access to view the dashboard, please reach out to the Office of Decision Support and Data Integrity with the request for access. The request will be reviewed based upon University Data Integrity policy. This is the same as the process for sharing in the explore tab of the home screen.

Download

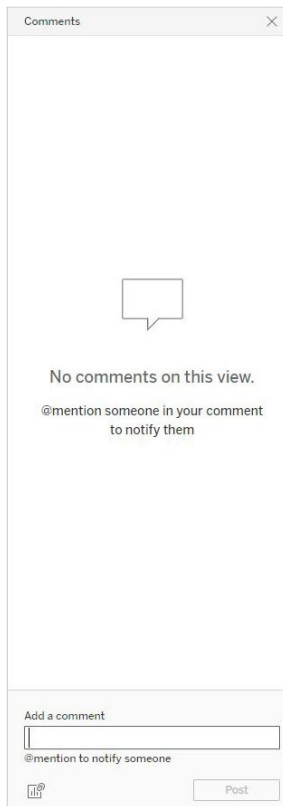


The Download button will provide you with the option to download a PDF version of the dashboard, download an Image, PPT slide, or allow you to download the underlying data. The options available here may vary from one dashboard to the next depending upon the data security settings for the specific dashboard. When

downloading a report, please continue to use best practices to secure the data and only share downloaded data with those whom have a need to view the data per Data Governance Guidelines.

Comments

Comments may be added to the dashboard to assist in sharing insight with others that also use the dashboard.



Additional Information

Data Insights Platform

<https://datainsights.villanova.edu/>

Tableau Resources

Tableau Training Website: <https://www.tableau.com/support/help>

Office of Decision Support and Data Integrity

Website: <https://www1.villanova.edu/villanova/provost/decision-support.html>

Email: ODSDI@Villanova.edu