

Johns Hopkins Tableau Influenza Vaccination Dashboard User Guide

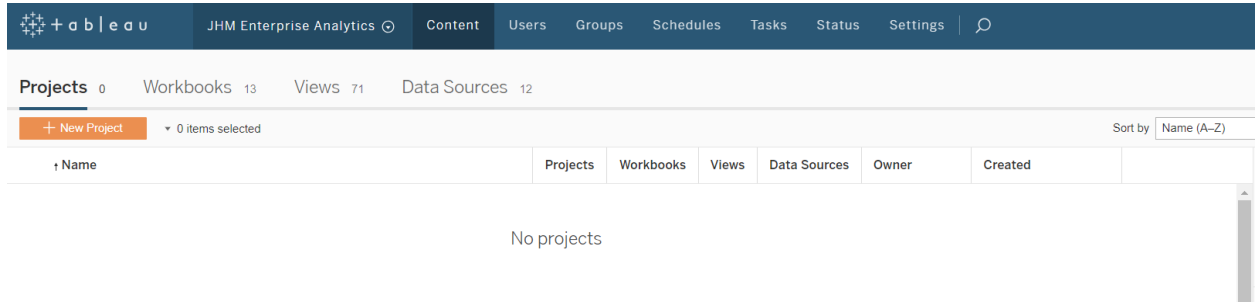
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Introduction to Tableau

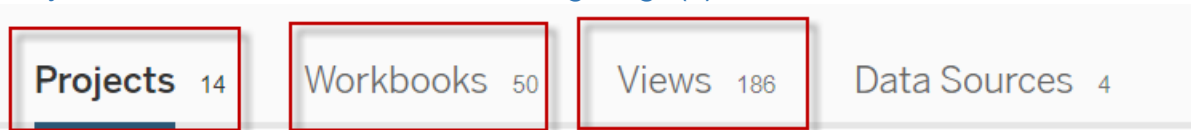
Login

- ❖ Launch internet browser (Google Chrome is preferred)
- ❖ Navigate to <https://tableau.jhmi.edu>
 - Note: you may have to pick the “JHM Enterprise Analytics” Site from the drop-down list



- ❖ Use Johns Hopkins (JHED) credentials to gain access
**NOTE: If you do not have access, send a request to HSE Info HSEInfo@JHMI.edu or tableau@jhmi.edu .*
- ❖ Direct Link to Report:
<https://tableau.jhmi.edu/#/site/JHMEnterpriseAnalytics/workbooks/4768/views>

Project or Workbooks or View Landing Page(s) to Access Dashboard



- ❖ Either Select the Project – **Home > Service Lines > Occupational Health and Safety**
- ❖ or Select the Workbook to view - **Influenza Vaccination Detail Report – JHM**
- ❖ or Navigate to the Views
 - Choose from any of the views below
 - Flu Vaccination Details
 - Flu Vaccination Summary
 - Export Friendly Report
 - Flu Vaccination Details - People
 - Flu Vaccination Details (Cost Center)
 - Flu Vaccination Summary (Cost Center)
 - Information

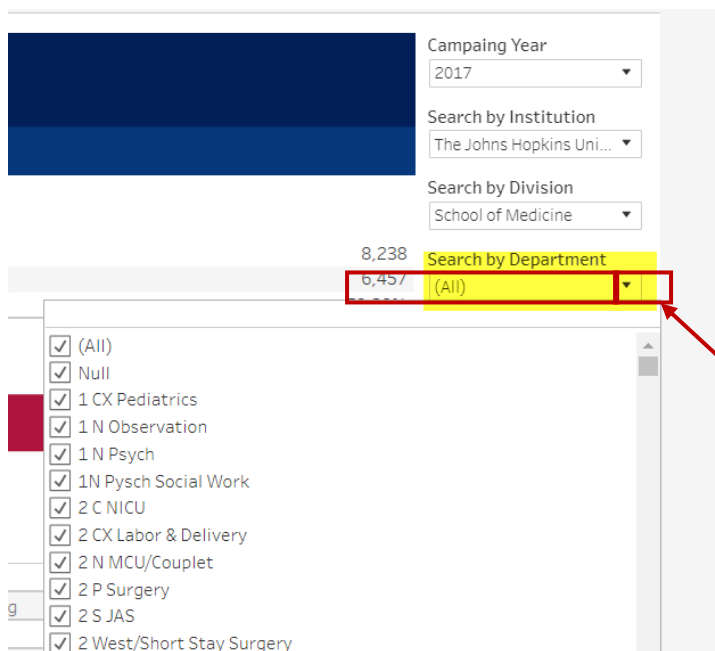
Exploring Views

Overview

- ❖ **Views** created as tabs
- ❖ **Filters** consolidate the amount of data viewed at any given time
- ❖ **Hierarchies** provide various drill down & drill up tiered options (i.e. by HR Organizational Structure or SAP Cost Center)

Filters and Legends

- ❖ **How to Filter:** Filters are located on the right menu of each view.
 - By default, all values are not selected in each filter, except for the current Campaign Year.
 - You'll need to make a "Division" selection before getting relevant values in the filters
 - Hover over the drop down arrow – you will be given multiple values from which to choose.
- ❖ Optional, click **Apply** after selecting any number of values.



You have the ability to select all values, a single value, multiple values, or type your value in the textbox.

8,238
6,457

Search by Department
(All)

Ped


- 1 CX Pediatrics
- ACH Pediatric ACCM
- ACH Pediatric Neurosurgery
- ACH Pediatric Oncology
- ACH Pediatric Plastic Surgery
- ACH Pediatric Surgery

You have the ability start typing and doing a search as well.

Drill Down

- ❖ **Drill down:** Navigate to more granular levels of data

Flu Vaccination Details | Flu Vaccination Summary | Export Friendly Report

 **JOHNS HOPKINS**
MEDICINE

DETAILS

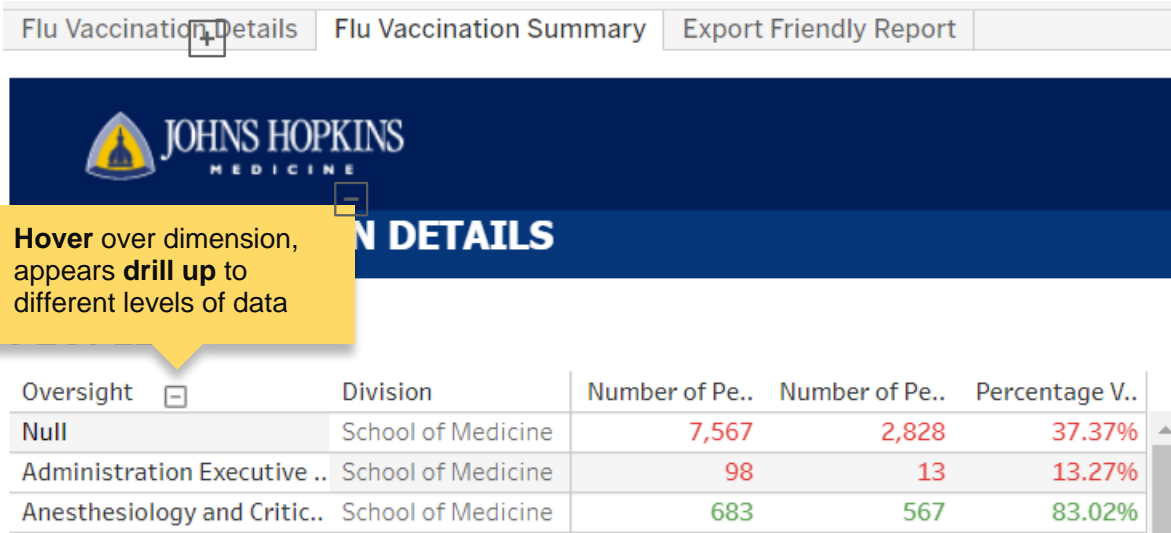
Hover over dimension, appears allowing **drill down** to different levels of data

Oversight	Number of People	Number of People Im..	Percentage Vaccinat..
Null	7,567	2,828	37.37%
Administration Executive ..	98	13	13.27%
Anesthesiology and Critic..	683	567	83.02%

Drill Up

- ❖ **Drill up:** Navigate to broader levels of data

Flu Vaccination Details | Flu Vaccination Summary | Export Friendly Report



FLU VACCINATION DETAILS

Oversight	Division	Number of Pe..	Number of Pe..	Percentage V..
Null	School of Medicine	7,567	2,828	37.37%
Administration Executive ..	School of Medicine	98	13	13.27%
Anesthesiology and Critic..	School of Medicine	683	567	83.02%

Hierarchies

- ❖ **Hierarchies:** Provide drill down and drill up capabilities, allowing you to navigate through nested levels of data.

You have the ability to select from a variety of hierarchies. Each hierarchy displays the levels of nested data in a different order. You'll find the Cost Center hierarchy in the Flu Vaccination Details or Summary (Cost Center) tabs/views.

- For more information about Hierarchies, see our FAQs below: *Reporting Hierarchy Taxonomy*

Select a hierarchy

Flu Vaccination Details - Division | Flu Vaccination Details - People | Flu Vaccination Summary | Export Friendly Report | Information

Campaign ... 2018

Hierarchy | Division ...

Division > Oversight > Department
Cost Center > Business Area > Cost Center Department

FLU VACCINATION DETAILS

Customize View

- ❖ When initially launching dashboard you will be in the **Original View**. When making changes to a view – whether it be sorting, filtering, etc. – you have the ability to save as a **Custom view**.

An * (asterisk) indicates changes were made to the original view

Create a name for the view and Save. You may also set as the default view.

Subscribe, Share, Full Screen

- ❖ **Subscribe** to receive a view or entire workbook for a scheduled period.
- ❖ **Share**: Email the workbook – a link is sent via email for the recipient to view the workbook.
- ❖ **Full Screen** occupies the whole display surface of your screen.

How to Download

Download

- ❖ **PDF** is a snapshot of the view with additional layout/format options
*preferred type of download.
- ❖ **Crosstab** is a representation of graphical data in textual form – transfers the selected data from the workbook to excel.

! ATTENTION -- BEST PRACTICE !

Please make sure to click on cells first before clicking the "Download > Crosstab" option in the Export Friendly Report View to download the details into Excel and get the Crosstab option

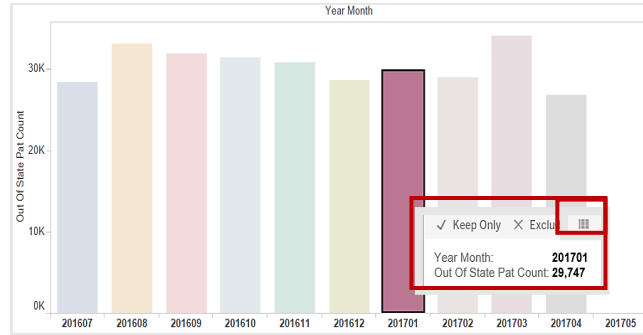
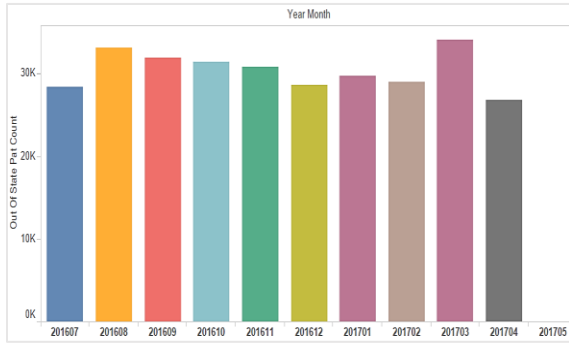
- ❖ **Data** is an extract of the underlying information depicted in graphs. Two options...

Option 1

Click anywhere inside the **graph**, enabling ability to download data

Option 2

Choose a **bar** metric, a window will appear giving the option to **View Data**



- A new window will launch, giving the option to download a **Summary** or **Full data** extract to a file.

❖ **Image** is an exact snapshot of what is on screen.

How to Print

Print from PDF

❖ You can print the dashboard, sheets in dashboard, or sheets in workbook.

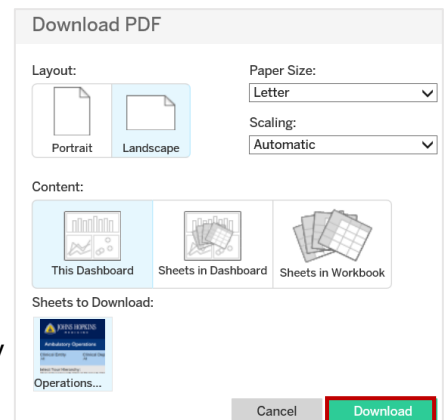
1

Download from the toolbar in the top-menu pane of the Tableau window



2

Choose a layout, paper size, scaling, and content; then click **Download**



3

After clicking download, another dialog box will appear – Click **Download** again and print the PDF from **Adobe Reader** (or any compatible software.)

Frequently Asked Questions (FAQs)

What does the Filter Prompts consist of?

The Filter Selection Prompts provide essential search criteria to help find individual(s).

- **Search by Department** = Using a Free Text or Number Key (i.e. org. unit number) value, to find a desire Department(s).
- **Search by Organization Structure** = In an organization structure, there are many levels, find a designated Division, SAP Oversight Unit, Functional Unit, Department, SAP Personnel Area #, SAP Org Unit & SAP Org Unit #
- **Select Cost Center(s)** = Find the SAP default Home Cost Center for the employee's position.

! ATTENTION -- BEST PRACTICE !

Please make sure to un-select the default "Limit Report System of Record" and select "Choose a System of Record" = HOSP and/or UNIV for a complete picture of people connected to a SAP Cost Center

- **Search by Last Name, First Name [JHED ID]** = Find the person by their JHED-ID or last or first name, separated with a comma
- **Select Campaign Year** = Defaults to the current campaign year.
- **Limit Report System of Record** = defaults to the Reports custom built logic for primary system-of-record that a person is affiliated with (i.e. primary and SAP Hospital or University).
- **Choose a System of Record** = Will allow a user to select the actual system of record

! ATTENTION -- BEST PRACTICE !

- If you're looking for just Employees by SAP Personnel Area, Please make sure to un-select the default "Limit Report System of Record" – "True" or "yes" and select "Choose a System of Record" = HOSP and/or UNIV for a complete picture of people connected to a SAP Employee Divisions

- **Limit Primary System of Record** = defaults to the primary system-of-record that a person is affiliated with.

Reporting Hierarchy Taxonomy

This is an organizational hierarchical taxonomy to help classify the various organizational level characteristics across the Hopkins Identity Management and systems-of-records, also known as people data provided by JHED.

For Example:

Institution (Level 1) = The Johns Hopkins Medical Institution
Division (Level 2) = Johns Hopkins Hospital
Oversight or Functional Unit (Level 3) = Medicine -JHH
Department (Level 4) = Medical ICU Nursing (10001847)
Person = Last, First Name

For Example:

Business Area (Level 1) = Johns Hopkins Hospital (480)
Department (Level 2) = 4800
Sub Department (Level 3) = 480001
Cost Center (Level 4) = (4800010304)

What is different between the counting methods of Total Number of Eligible People in Flu Vaccination Detail vs. Flu Vaccination Summary?

The "The Flu Vaccination Detail" report simply counts an individual one-time (i.e. for each jhed-id), no matter how many systems-of-record they are sponsored from; however, the "Flu Vaccination Summary" report, which groups people based on Organization, may show the person counted more than once and credited under each of the Organizations they are assigned.

Searching for People via Flu Vaccination Details – People View

When searching for individual people, please use this view.

You'll be able to begin typing in the name of the person or their jhed-id in Search by Last, First Name (JHED-ID) Filter.

However in order to return 1 record, you may have to

1. un-select "All"
2. and then type in values
3. followed by Apply

