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UW Tableau Installation in support of the Public Display of UW Data

**Purpose**

This document outlines the administration and usage of a UW onsite installation of Tableau Public. The UW Tableau Server instance is being installed on the public IP in order to enable UW campus users to publish Tableau visualizations to users outside of UW[[1]](#endnote-1).

**Data must only published externally if required for business reasons. In these cases, publishers must use the UW Tableau Public installation rather than the vendors’ Tableau public offering.**

This guideline supersedes Guideline #1026, in which the Data Management Committee (DMC) granted the Office of Planning & Budgeting temporary permission to publish a limited set of aggregate data using Tableau Public Premium with approval of the relevant data custodians.

**Overview / Problem Statement**

Since Tableau was implemented as the data visualization tool of choice at UW in fall of 2013, many units across campus have created new dashboards for understanding data and trends in diverse areas of expertise, and shared them with an internal audience. Many have also expressed the desire to be able to publish visualizations to the public at large. As a public institution, UW values transparency. The institution is also committed to balancing transparency with our obligation to protect the privacy of our students, faculty and staff, as well as the confidentiality of some of our institutional data. To this end, the Data Management Committee is developing this policy to govern the public display of UW data.

**Observations, Recommendations and Agreements**

The public display of UW data through UW Tableau Public is governed as follows:

1. UW Information Technology (UW-IT) will maintain the Tableau server infrastructure and configuration of IP addresses. UW-IT will also manage the publishing of all visualizations and data extracts.
2. The Tableau server is divided into two virtual environments: a public facing instance for public access, and a UW internal instance so that users can continue to share visualizations safely with UW colleagues internally. The internal server will continue to require log in using the standard UW authentication methods set up by UW-IT.
3. Both environments will implement SSL (https) to access Tableau server.
4. Users who access visualizations from outside of UW (“the public”) will not be able to download or manipulate any visualizations using Tableau Desktop or in-browser web editing mode.
5. UW Tableau Public will prevent any direct access to UW data or data sources. Visualizations published to the UW Tableau Public site will only use extracted data. Visualizations using live connection to internal data sources will not be published.
6. Business units will appoint a single point-person and “owner” of the data extract. The point-person is required to coordinate the validation, publication, and refresh of the data with data custodians and UW-IT.
7. Data custodians shall strive to ensure the quality, integrity and consistency of the data.
8. All visualizations published to the UW Tableau Public server that contain information about individualsmust follow safe data aggregation procedures identified in DMC Guideline #1027

**Concurrence / Responsibility**

**The undersigned concur with observations, recommendations and Agreement in this data access guideline document.**

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| **Signature****Associate Vice President Information Management, UW Information Technology – Aaron Powell** |  | **Date** |
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| **Signature****Chief Information Security Officer, UW Information Technology – Kirk Bailey** |  | **Date** |
| **Signature****Associate Dean for Research Administration and Infrastructure, College of Arts & Sciences – Steve Majeski (DMC Co-Chair)** |  | **Date** |
|  |  |  |
| **Signature****Associate Vice President, Planning and Management – Gary Quarfoth (DMC Co-Chair)** |  | **Date** |

1. This instance is called “UW Tableau Public” in this document. [↑](#endnote-ref-1)