

# TABLEAU CLOUD ACCOUNT SETUP

DCF'S Guide on Setting up a Tableau Cloud Account 10/25/23

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## **Purpose Statement**

The purpose of this Tableau User Guide is to provide documentation that guides staff on how to set up and access their Tableau Cloud account. This guide also will go over components of staff's Tableau Cloud home landing page.

## Tableau Cloud Setup

Please monitor your emails for the following notifications that will occur once you are added to the Tableau cloud Environment.

### 1. Tableau Cloud Email:

You will receive and email from Tableau Cloud that you have been added to the site:

a.	<ul> <li>From: Tableau Cloud <reghelp@onlinemail.tableau.com></reghelp@onlinemail.tableau.com></li> <li>Sent: Monday, September 11, 2023 10:36 AM</li> <li>To:</li> <li>Subject: [EXTERNAL] You've Been Invited to Tableau Cloud</li> </ul>	
	++++++ a b   e a u.	
	has invited you to join the Tableau site, NJDCFAnalytics.	
	Interact with data to inform your decisions.	
	Customize data visualizations to answer your questions.	
	Share discoveries to put data at the center of your conversations.	
	Join Now	

#### 2. DCF-IT Email:

You will also receive an email from IT with step-by-step instructions on how to add you Tableau Cloud (DCF Analytics) account to your myNewJersey account:

Dear

Important DCF Analytics Registration Information:

Your authorization code for DCF Analytics is

This code is personalized for you. You only need to use it once to add this service to your myNewJersey account. After you enter it using the steps below, you won't need to use it again.

Please follow these instructions carefully:

- Open an Internet browser, type www.nj.gov in the address box and press the Enter key.
- Click the Login link near the upper left of the page and the myNJ login page will appear.
- If you already have a myNJ account, log in to it.
  - Otherwise, click or tap 'Sign Up' to create one now. When you're done signing up, go to step 4.
- Click or tap 'auth code' to the right of the Welcome message:

OFFICIAL SITE OF THE STATE OF NEW JERSEY	NJ.gov   Services   Agencies   FAQ
My NewJersey	i auth code   layout   help
1 Warning: if your browser automatically enters your ID and password for myNJ on any of your devices, learn wh	hat you need to do before myNJ's name changes.

• Copy the code from the IT email and paste it into the box labeled 'Enter your authorization code':

1. If 2. C 3. Y 4. If 5. P	you've been given an authorization code, type or "paste" it into the box below (otherwise, click "Cancel"). lick the "Finished" button. our code will be verified and your profile will be updated with your new role. the update is successful, the <i>myNewJersey</i> portal will end your current session and, after a few seconds, will return your browser t le login page. ease log back in and verify that your <i>myNewJersey</i> desktop includes the content for your new role.
	Enter your authorization code:

	Finished', and the system will log you	out.
Log back into	o your account. The DCF Analytics lin	k will be on your myNJ page now.
Please addre	ess any comments and suggestions to	o us at @dcf.nj.gov.
Notice: Unde another user	er no circumstances should you give r requires system access, please hav	your authorization code to another use them contact @dcf.r
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## **Tableau Cloud Home Landing Page**

Once you select DCF Analytics, you will enter the Tableau Cloud Environment. Once you enter Tableau Cloud you will come to the "Home" landing page:

(intro)	Home	Q. Search for views, metrics, workbooks, and more 2 (2) (1)
THOREN AND FARME	Welcome to your Tableau site	
A Home	Harness the power of your data. Unleash the potential of your people.	
🟠 Favorites	New v	
③ Recents	Upload Workbook   Manage Projects   Manage Users   Download Tableau Desktop   Download Tableau Prep Builder	
&g Shared with Me		
Q Recommendations	Recents	See All
Personal Space		
E2 Collections		
Explore		
External Assets		1

#### 1. Left Side Menu:

- Home: Home page
- **Favorites**: Workbooks that you have marked as favorite
- **Recents**: Anything you have recently viewed within Cloud
- Shared with Me: Work that was shared with you
- **Recommendations**: Views you may want to see based on usage
- **Personal Space**: your own "sandbox" to create content if needed
- Collections: Dashboards you have collected for easy viewing
- Explore: This will take you to all project that you are currently assigned to

#### 2. Explore tab:

If you select Explore, you will be brought to all projects you are assigned to: Select the folder for the project you would like to view.

3	<	Q. Search for views, metrics, workbooks, and more
THE DEPARTMENT	Explore Top-Level Projects + New - Select All Type + Name	Sot By: Name (a-z) + ▼ Ⅲ ▼ マ Actions Projects Workbooks Views Data sources Databases Tables Owner Created
IN AND TH	□ ☆ 🗁 default	0 0 0 0 0 0 Mar 21. 2023. 10.19 AM
🛱 Home		
☆ Favorites		
③ Recents		
ද්දු Shared with Me		
Q Recommendations		
Personal Space		
E Collections		
Explore		
External Assets		

## From here, you can select the folder for the project you would like to view:

<	Explore / Office of Monitoring (GOM) / FPS Monitoring Scorecard	,O Sea	arch for views, workbooks, and more	0 4 📧
ST STOREY DEPARTING	* • • •			
JAN .	New • Select All		Content Type: All 🗸	Sort By: Type 💌 📕 👻 🖤
EN AND F	Name	Туре	Actions Owner	Modified
G Home	🗆 🚖 🖻 Production Data	Project		
$\frac{1}{2} \frac{A}{4}$ Favorites	口 ☆ 色 Sandbox	Project		
<ol> <li>Recents</li> </ol>	Family Preservation Services Demo	Workbook		
Shared with Me	口 ☆ 画 Family Preservation Services Monitoring Scorecard	Workbook		
Recommendations	Ar B FPS Monitoring Alert Tool	Workbook		
(g) Personal Space				
B Collections				
Explore				
External Assets				

Within the Family Preservation Services, select the dashboard you would like to view. You can add a dashboard to your favorites by selecting the

<	Explore / Office of Monitoring (00M) / IPS Monitoring Scorecard / Tamily Preservation Services Demo	D Search for views, workbooks, and	more 🖉 🧷	△ 💿
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CHILDREN AND FAMILIE	EditWorkbook			
Home	Views 5 Data Sources 2 Custom Views 0 Extract Refreshes 0 Subscriptions 0 Lineage Select All		Sort By: Sheet (first-last) •	· .
☆ Favorites	Type Name	Actions	Acceleration Views (all-tin	ne) + Sheet
Recents	📩 🔂 Cover Page		Off 25	1
Shared with Me	다 ☆ 區 FPS Overall Scores Statewide vs. Agency		Off 17	2
V Recommendations	口 ☆ 画 FPS Overall Scores Site Level		Off 13	3
(g) Personal Space	口 ☆ 圖 Questions by Provider		Off 3	4
Collections	口 ☆ 画 Questions by Site		Off 10	5
Explore				
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