TABLEAU FACTBOOK MAKEOVER

Tips and tricks for updating existing dashboards for visual appeal, branding, student privacy, and mobile settings

While you are waiting:

1. OPEN THIS POWERPOINT: tinyurl.com/MDAIR25PPT
2. Download this tableau public file: tinyurl.com/MDAIR2025
3. Connect it to this data source: tinyurl.com/MDAIRData

Rae Kuprenas
rkuprenas@loyola.edu

PPT LINK: tinyurl.com/MDAIR25PPT

AGENDA

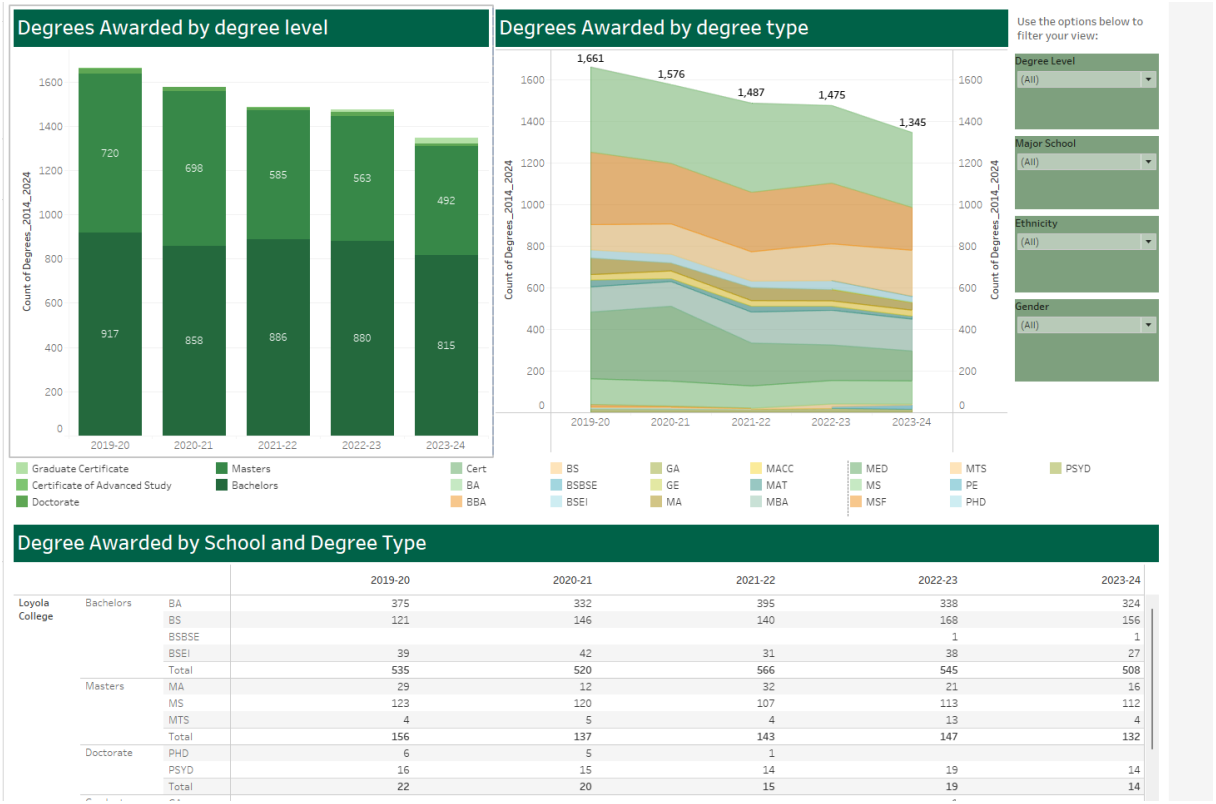
HOW WE GOT HERE

- Until 2020, Loyola University MD used traditional PDF factbooks for reporting enrollment, degrees earned, etc.
- In 2020, we transitioned to Tableau
  - Tableau server was too expensive, combined desktop and public to create public facing dashboards.
- In 2024, our OIR office got to temporarily expand due to workday transition of student data
  - 2 temporary employees
    - To get familiar with all our freeze files and general feel of the university we were given the task of reworking our tableau factbooks

PPT LINK: tinyurl.com/MDAIR25PPT

EVALUATING EXISTING DASHBOARDS

1. Purpose
2. Ease of use/visual appeal
3. Branding
4. Student privacy
5. Consistency



			2019-20	2020-21	2021-22	2022-23	2023-24
Loyola College	Bachelors	BA	375	332	395	338	324
		BS	121	146	140	168	156
		BSBSE				1	1
		BSEI	39	42	31	38	27
		Total	535	520	566	545	508
	Masters	MA	29	12	32	21	16
		MS	123	120	107	113	112
		MTS	4	5	4	13	4
		Total	156	137	143	147	132
	Doctorate	PHD	6	5	1		
		PSYD	16	15	14	19	14
		Total	22	20	15	19	14

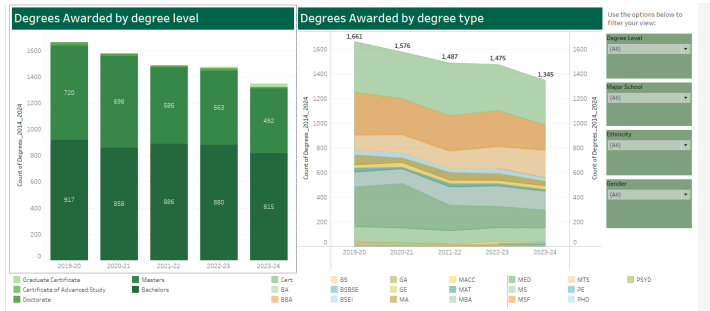
PPT LINK: tinyurl.com/MDAIR25PPT

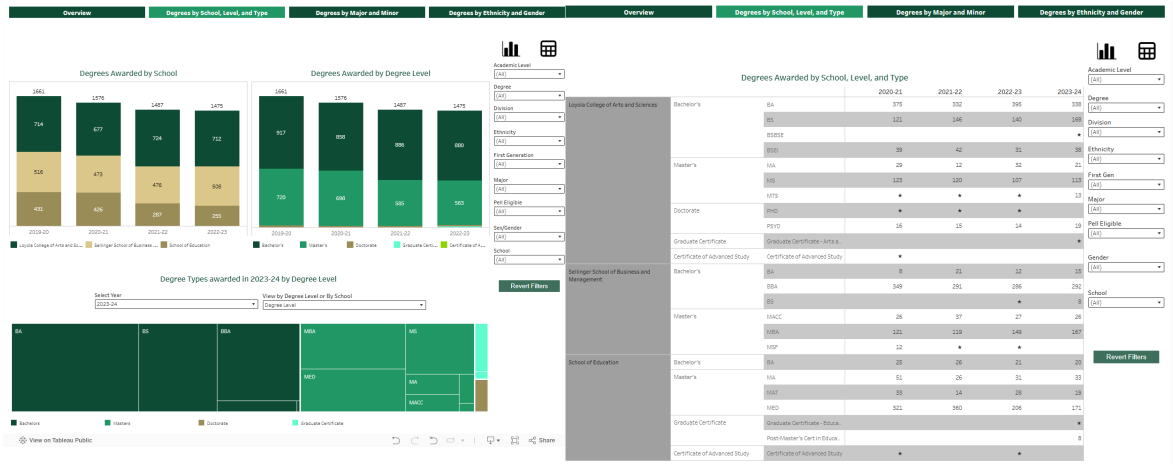
FINDING: PURPOSE

Public dashboards have 2 purposes

- Internal use: More number focused. Need to quickly get numbers and report
- Public use: More visual focused. Need to see trends and visuals to attract students/faculty/staff

Solution: create 2 views – one for charts and one for tables. Can show more data that is useful to users





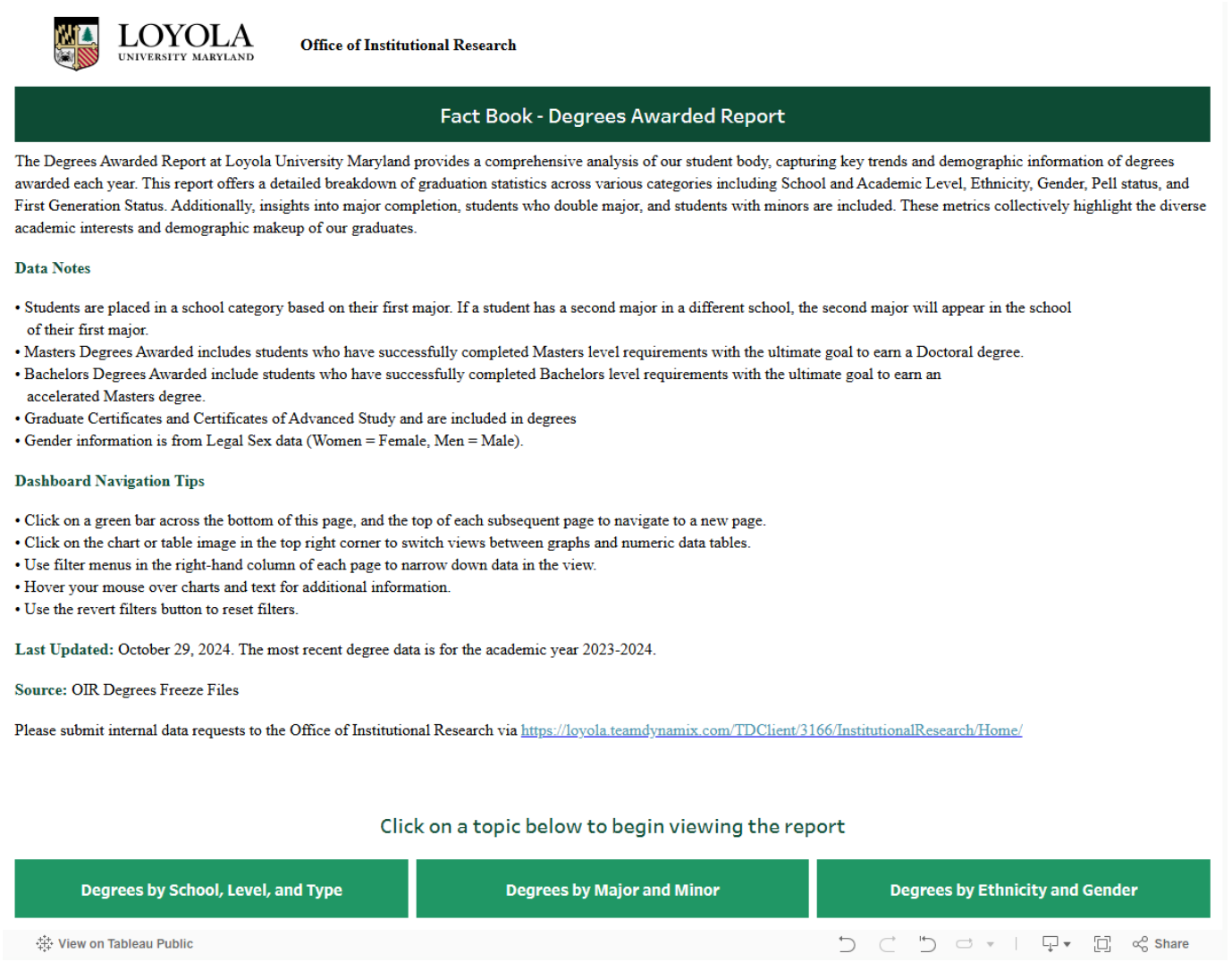
PPT LINK: tinyurl.com/MDAIR25PPT

FINDINGS: EASE OF USE/VISUAL APPEAL

1. Definitions and methods are not described
2. Some charts show totals, some do not
3. Filters do not impact all charts/tables
4. The degrees dashboard did not show combined major 1/major 2

Solution:

1. Add an overview page to all dashboards.



LOYOLA UNIVERSITY MARYLAND

Office of Institutional Research

Fact Book - Degrees Awarded Report

The Degrees Awarded Report at Loyola University Maryland provides a comprehensive analysis of our student body, capturing key trends and demographic information of degrees awarded each year. This report offers a detailed breakdown of graduation statistics across various categories including School and Academic Level, Ethnicity, Gender, Pell status, and First Generation Status. Additionally, insights into major completion, students who double major, and students with minors are included. These metrics collectively highlight the diverse academic interests and demographic makeup of our graduates.

Data Notes

- Students are placed in a school category based on their first major. If a student has a second major in a different school, the second major will appear in the school of their first major.
- Masters Degrees Awarded includes students who have successfully completed Masters level requirements with the ultimate goal to earn a Doctoral degree.
- Bachelors Degrees Awarded include students who have successfully completed Bachelors level requirements with the ultimate goal to earn an accelerated Masters degree.
- Graduate Certificates and Certificates of Advanced Study and are included in degrees
- Gender information is from Legal Sex data (Women = Female, Men = Male).

Dashboard Navigation Tips

- Click on a green bar across the bottom of this page, and the top of each subsequent page to navigate to a new page.
- Click on the chart or table image in the top right corner to switch views between graphs and numeric data tables.
- Use filter menus in the right-hand column of each page to narrow down data in the view.
- Hover your mouse over charts and text for additional information.
- Use the revert filters button to reset filters.

Last Updated: October 29, 2024. The most recent degree data is for the academic year 2023-2024.

Source: OIR Degrees Freeze Files

Please submit internal data requests to the Office of Institutional Research via https://loyola.teamdynamix.com/TDClient/3166/InstitutionalResearch/Home/

Click on a topic below to begin viewing the report

Degrees by School, Level, and Type | Degrees by Major and Minor | Degrees by Ethnicity and Gender

View on Tableau Public Share

PPT LINK: tinyurl.com/MDAIR25PPT

FINDINGS: EASE OF USE/VISUAL APPEAL

1. Definitions and methods are not described
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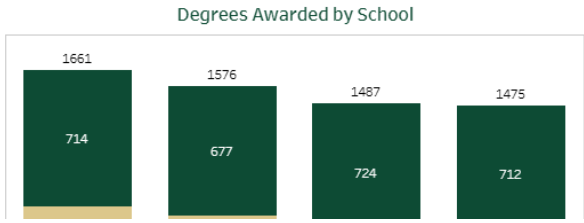
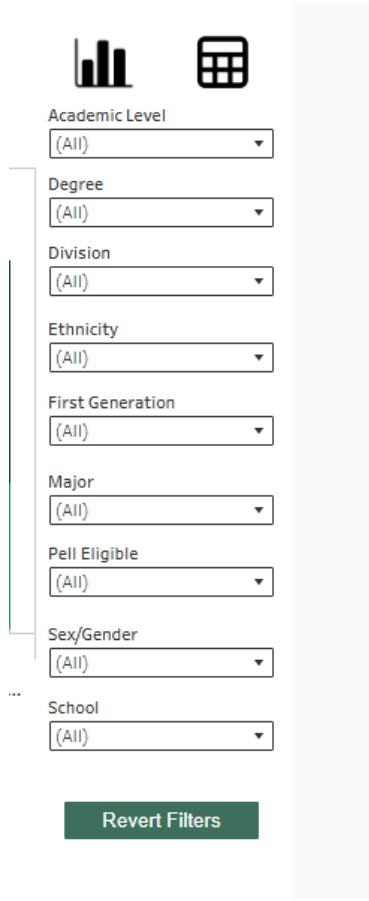
3. Filters do not impact all charts/tables
4. The degrees dashboard did not show combined major 1/major 2

Solution:

1. Add an overview page to all dashboards.
2. Add totals for all charts and tables
3. Have filters apply to all charts and tables





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FINDINGS: EASE OF USE/VISUAL APPEAL

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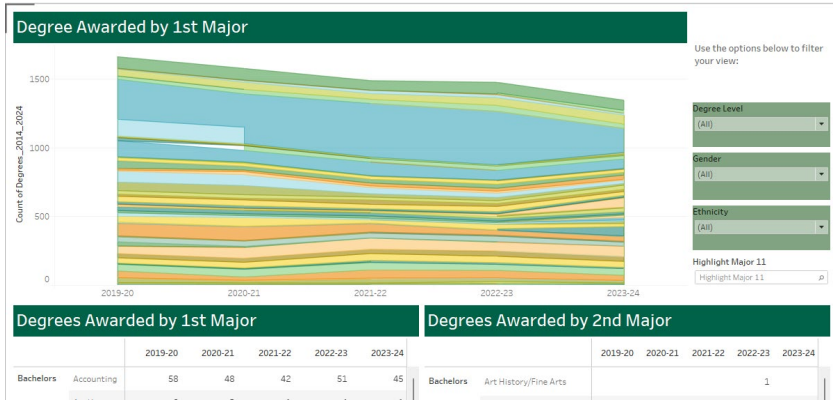
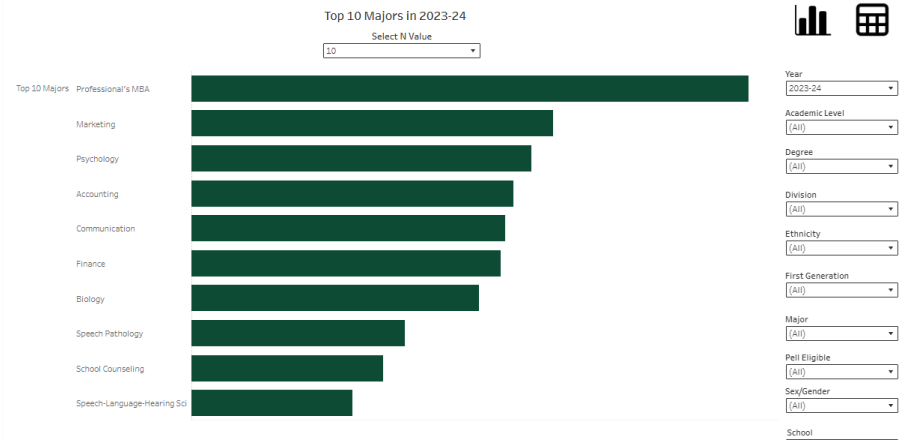
4. The degrees dashboard did not show combined major 1/major 2

Solution:

1. Add an overview page to all dashboards.
2. Add totals for all charts and tables
3. Have filters apply to all charts and tables
4. Combine major 1 and major 2





PPT LINK: tinyurl.com/MDAIR25PPT

HOW TO #1: PIVOT

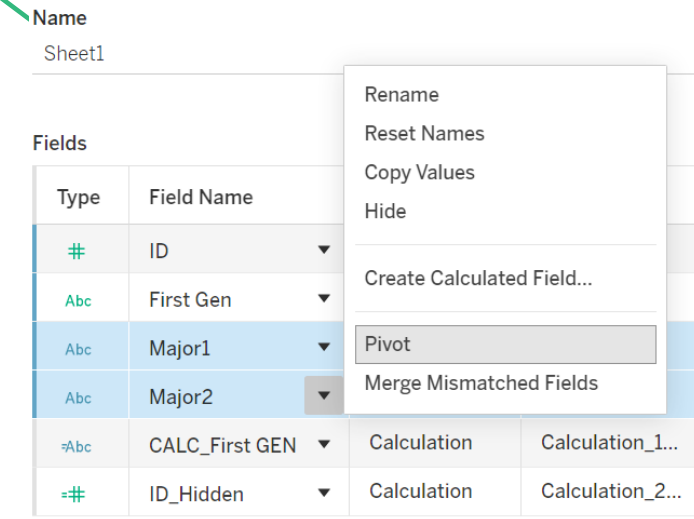
If you got here late:

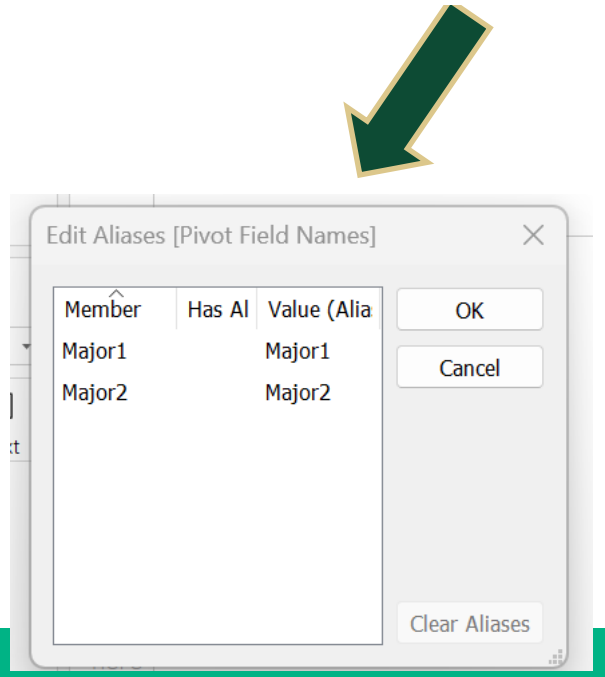
1. Tableau public file: https://tinyurl.com/MDAIR2025
2. Data source: https://tinyurl.com/MDAIR2025DATA

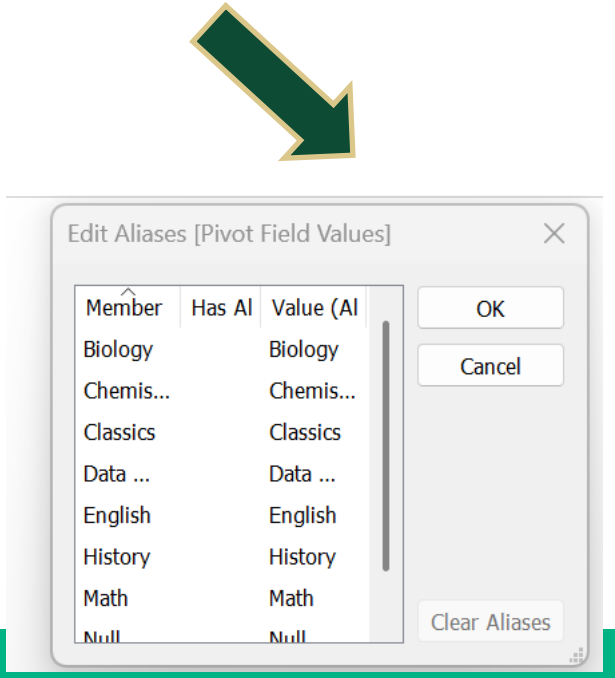
1. Go to data source
2. Select both columns
3. Right click
4. Select pivot

This will create the fields:

- **Pivot Field Names**: the title of the column from the data source
- **Pivot Field Values**: the value from the data source (rename this to your combined field)







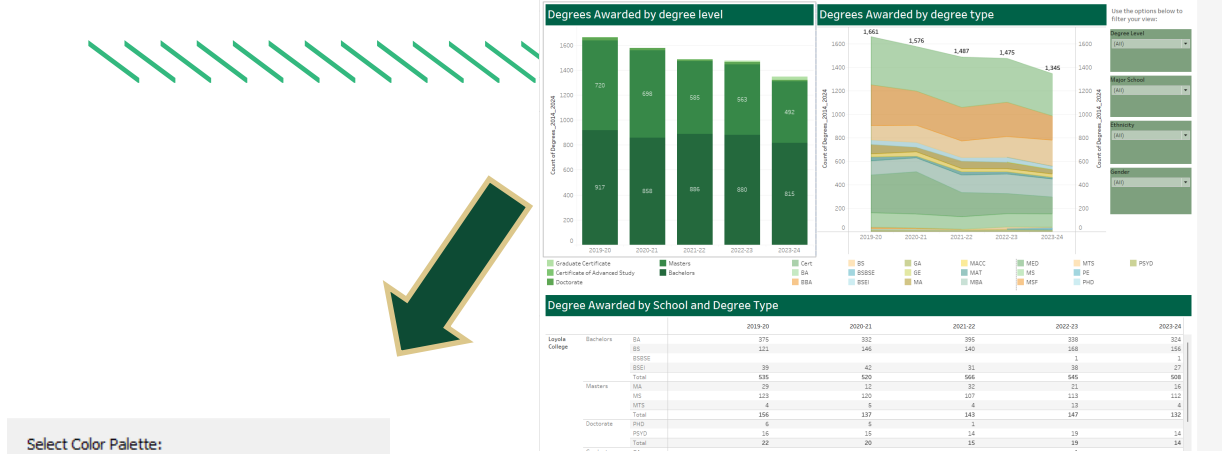
Loyola University Maryland Internal Use Only

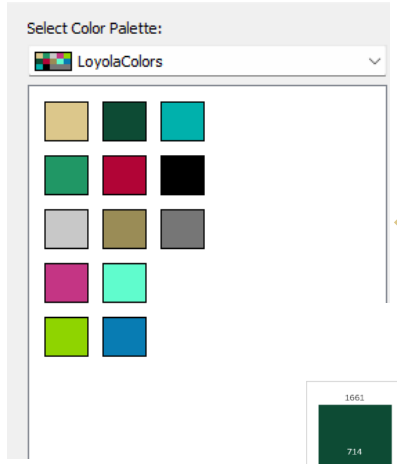
PPT LINK: tinyurl.com/MDAIR25PPT

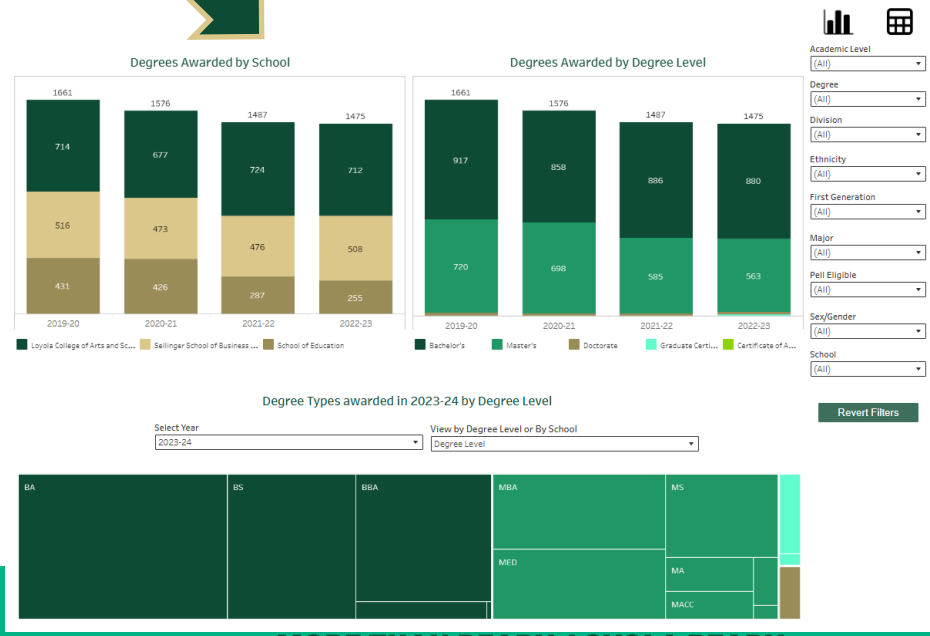
FINDINGS: BRANDING

Colors are close to official branding colors but use colors outside of official colors

Solution: Create a university color pallet that includes enough colors to account for all IPEDS ethnicities



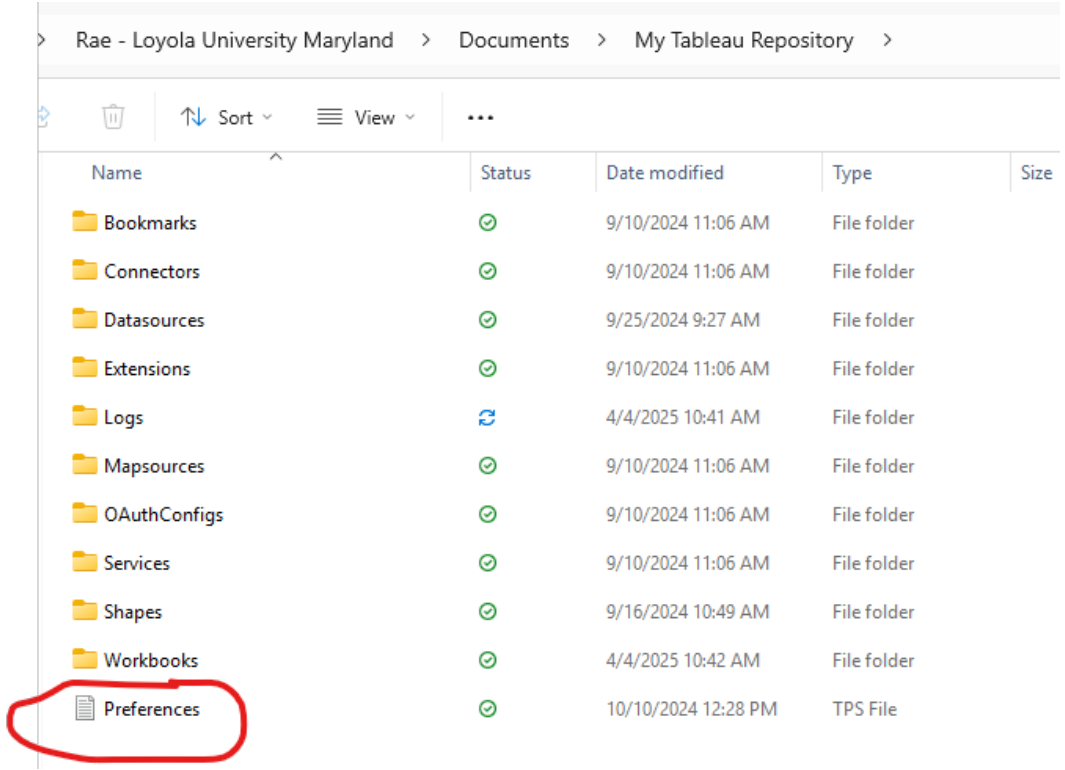




Loyola University Maryland Internal Use Only

PPT LINK: tinyurl.com/MDAIR25PPT

HOW TO #2: ADD A COLOR PALLET




```
<?xml version='1.0'?>
<workbook>
<preferences>
<color-palette name="LoyolaColors" type="regular">
<color>#DCC78B</color>
//add additional colors as needed
</color-palette>
</preferences>
</workbook>
```

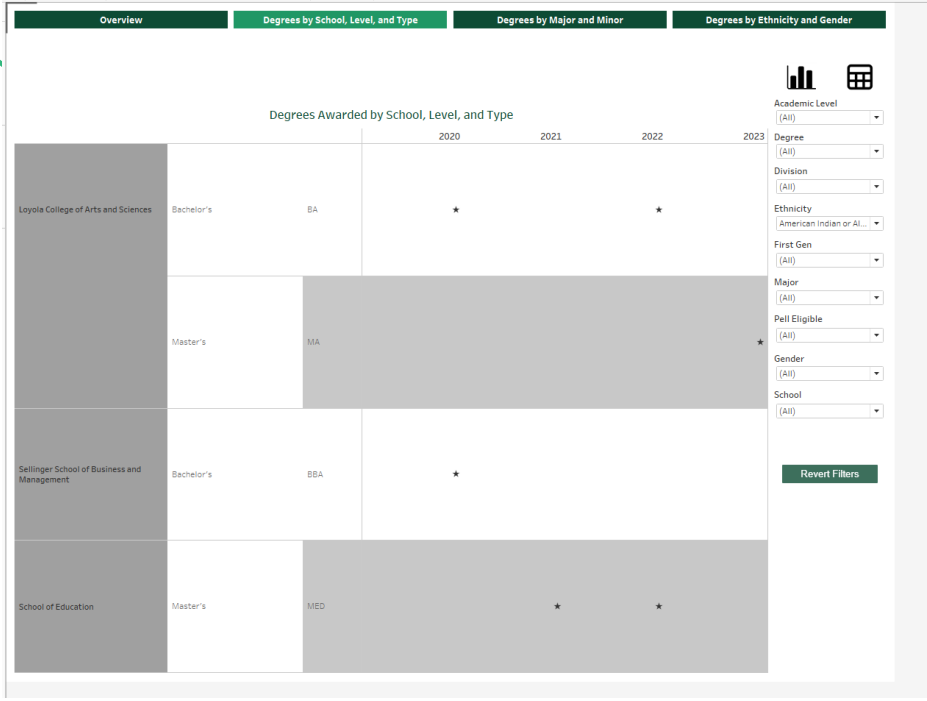
PPT LINK: tinyurl.com/MDAIR25PPT

FINDINGS: STUDENT PRIVACY

1. For some ethnicities and for “other” gender, you can filter to 1 student and see all information about a single student.
2. Files uploaded to Tableau public had some identifiable data in them

Solutions:

1. **Hide raw values for small n values.**
2. **Remove all unnecessary student information (birthdays, zip codes, etc) from data files**



Loyola University Maryland Internal Use Only

HOW TO #3: HIDE SMALL N VALUES

If you got here late:

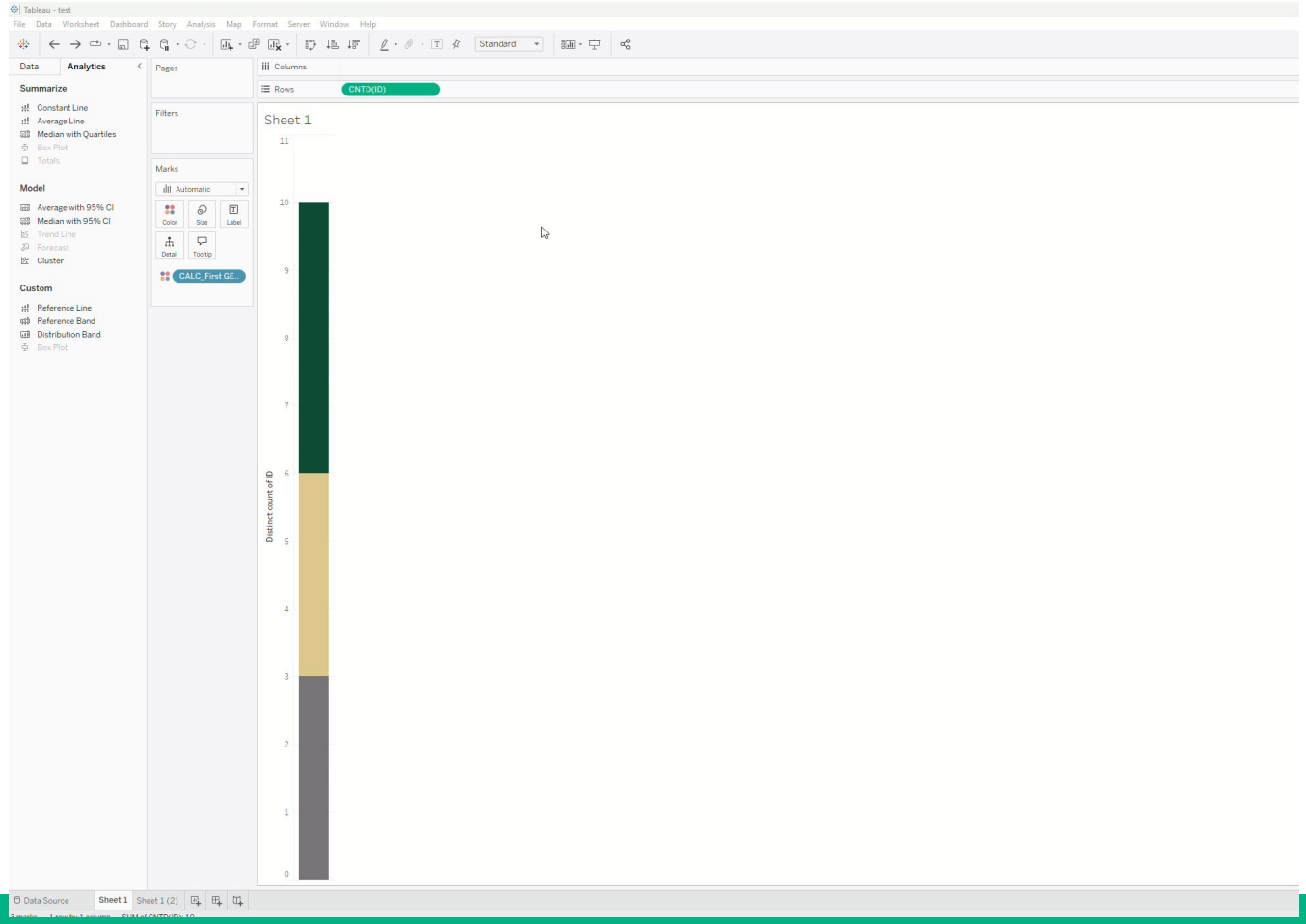
1. Tableau public file: https://tinyurl.com/MDAIR2025
2. Data source: https://tinyurl.com/MDAIR2025DATA
3. Final sheet

ID HIDDEN:

If countd([ID])>7 THEN
countd([ID])
Else -1
END

PPT LINK: tinyurl.com/MDAIR25PPT

HOW TO #3: HIDE SMALL N VALUES



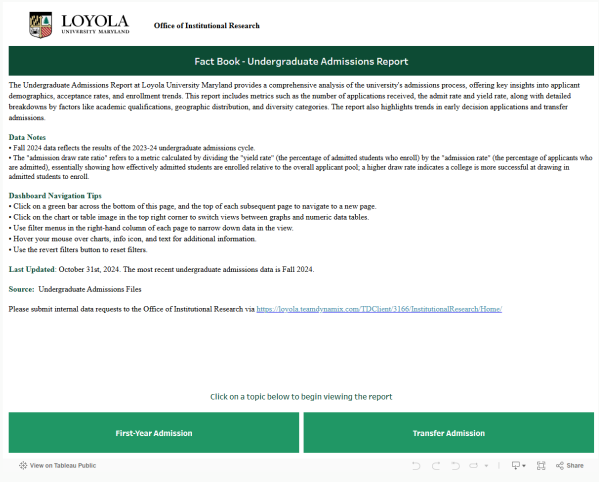
PPT LINK: tinyurl.com/MDAIR25PPT

FINDINGS: CONSISTENCY

Filters, types of graphs, colors, opening dashboard page, etc. were not consistent

Solution: create documentation of each dashboard to ensure consistency across creators

Fact Book - Undergraduate Admissions



LOYOLA UNIVERSITY MARYLAND Office of Institutional Research

Fact Book - Undergraduate Admissions Report

The Undergraduate Admissions Report at Loyola University Maryland provides a comprehensive analysis of the university's admissions process, offering key insights into applicant demographics, acceptance rates, and enrollment trends. This report includes metrics such as the number of applications received, the admit rate and yield rate, along with detailed breakdowns by factors like academic qualifications, geographic distribution, and diversity categories. The report also highlights trends in early decision applications and transfer admissions.

Data Notes
• Fall 2024 data reflects the results of the 2023-24 undergraduate admissions cycle.
• The "admission draw rate ratio" refers to a metric calculated by dividing the "yield rate" (the percentage of admitted students who enroll) by the "admission rate" (the percentage of applicants who are admitted), essentially showing how effectively admitted students are enrolled relative to the overall applicant pool; a higher draw rate indicates a college is more successful at drawing in admitted students to enroll.

Dashboard Navigation Tips
• Click on a green bar across the bottom of this page, and the top of each subsequent page to navigate to a new page.
• Click on the chart or table image in the top right corner to switch views between graphs and numeric data tables.
• Use filter menus in the right-hand column of each page to narrow down data in the view.
• Hover your mouse over charts, info icon, and text for additional information.
• Use the revert filters button to reset filters.

Last Updated: October 31st, 2024. The most recent undergraduate admissions data is Fall 2024.

Source: Undergraduate Admissions Files

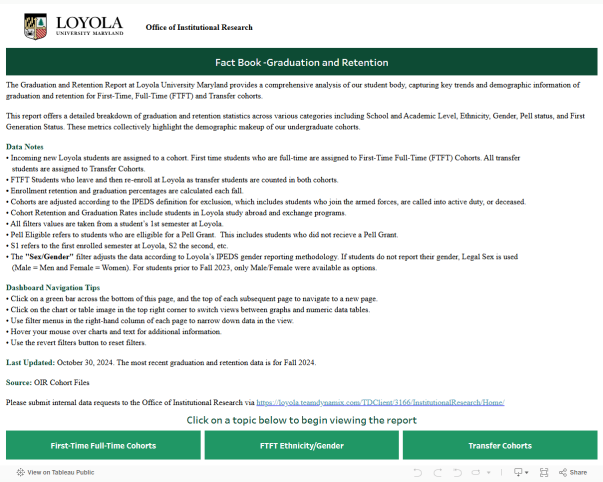
Please submit internal data requests to the Office of Institutional Research via https://loyola.teamdynamix.com/TDClient/3166/InstitutionalResearch/Home/

Click on a topic below to begin viewing the report

First-Year Admission | Transfer Admission

View on Tableau Public

Fact Book - Graduation and Retention



LOYOLA UNIVERSITY MARYLAND Office of Institutional Research

Fact Book -Graduation and Retention

The Graduation and Retention Report at Loyola University Maryland provides a comprehensive analysis of our student body, capturing key trends and demographic information of graduation and retention for First-Time, Full-Time (FTFT) and Transfer cohorts.

This report offers a detailed breakdown of graduation and retention statistics across various categories including School and Academic Level, Ethnicity, Gender, Pell status, and First Generation Status. These metrics collectively highlight the demographic makeup of our undergraduate cohorts.

Data Notes
• Incoming new Loyola students are assigned to a cohort. First time students who are full-time are assigned to First-Time Full-Time (FTFT) Cohorts. All transfer students are assigned to Transfer Cohorts.
• FTFT Students who leave and then re-enroll at Loyola as transfer students are counted in both cohorts.
• Enrollment retention and graduation percentages are calculated each fall.
• Cohorts are adjusted according to the IPEDS definition for exclusion, which includes students who join the armed forces, are called into active duty, or deceased.
• Cohort Retention and Graduation Rates include students in Loyola study abroad and exchange programs.
• All filters values are taken from a student's 1st semester at Loyola.
• Pell Eligible refers to students who are elligible for a Pell Grant. This includes students who did not recieve a Pell Grant.
• S1 refers to the first enrolled semester at Loyola, S2 the second, etc.
• The **"Sex/Gender"** filter adjusts the data according to Loyola's IPEDS gender reporting methodology. If students do not report their gender, Legal Sex is used (Male = Men and Female = Women). For students prior to Fall 2023, only Male/Female were available as options.

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• Hover your mouse over charts and text for additional information.
• Use the revert filters button to reset filters.

Last Updated: October 30, 2024. The most recent graduation and retention data is for Fall 2024.

Source: OIR Cohort Files

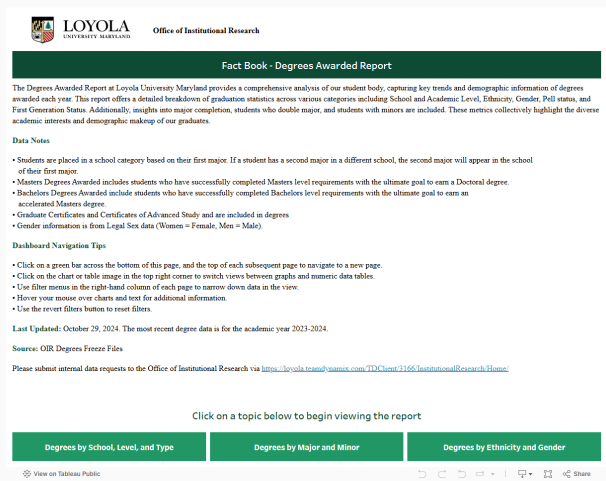
Please submit internal data requests to the Office of Institutional Research via https://loyola.teamdynamix.com/TDClient/3166/InstitutionalResearch/Home/

Click on a topic below to begin viewing the report

First-Time Full-Time Cohorts | FTFT Ethnicity/Gender | Transfer Cohorts

View on Tableau Public

Fact Book - Degrees Awarded



LOYOLA UNIVERSITY MARYLAND Office of Institutional Research

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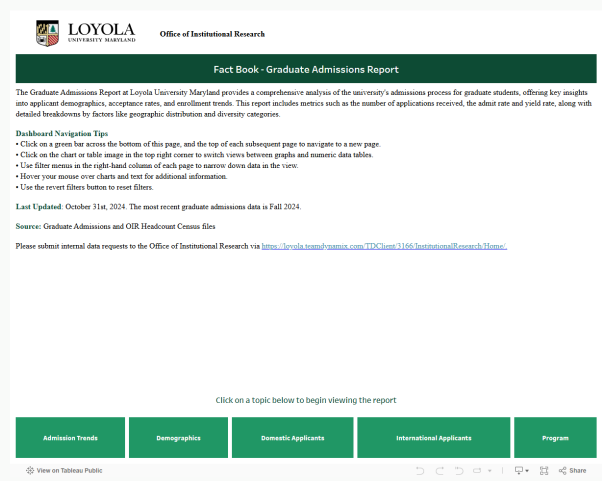
Click on a topic below to begin viewing the report

Degrees by School, Level, and Type | Degrees by Major and Minor | Degrees by Ethnicity and Gender

View on Tableau Public

Fact Book - Graduate Admissions



LOYOLA UNIVERSITY MARYLAND Office of Institutional Research

Fact Book - Graduate Admissions Report

The Graduate Admissions Report at Loyola University Maryland provides a comprehensive analysis of the university's admissions process for graduate students, offering key insights into applicant demographics, acceptance rates, and enrollment trends. This report includes metrics such as the number of applications received, the admit rate and yield rate, along with detailed breakdowns by factors like geographic distribution and diversity categories.

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• Use the revert filters button to reset filters.

Last Updated: October 31st, 2024. The most recent graduate admissions data is Fall 2024.

Source: Graduate Admissions and OIR Headcount Census files

Please submit internal data requests to the Office of Institutional Research via https://loyola.teamdynamix.com/TDClient/3166/InstitutionalResearch/Home/

Click on a topic below to begin viewing the report

Admission Trends | Demographics | Domestic Applicants | International Applicants | Program

View on Tableau Public

PPT LINK: tinyurl.com/MDAIR25PPT

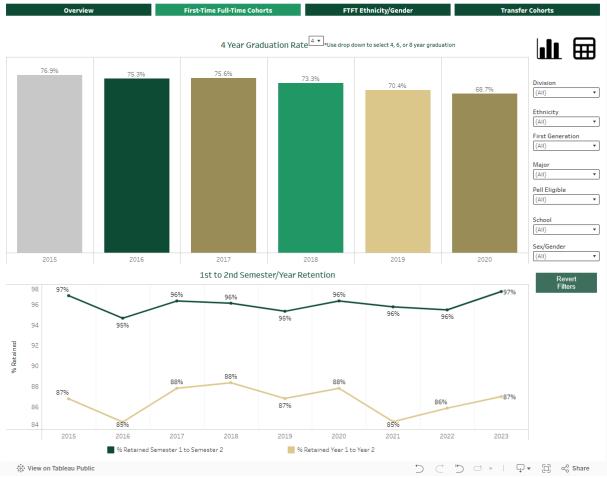
FINDINGS: CONSISTENCY

Filters, types of graphs, colors, opening dashboard page, etc. were not consistent

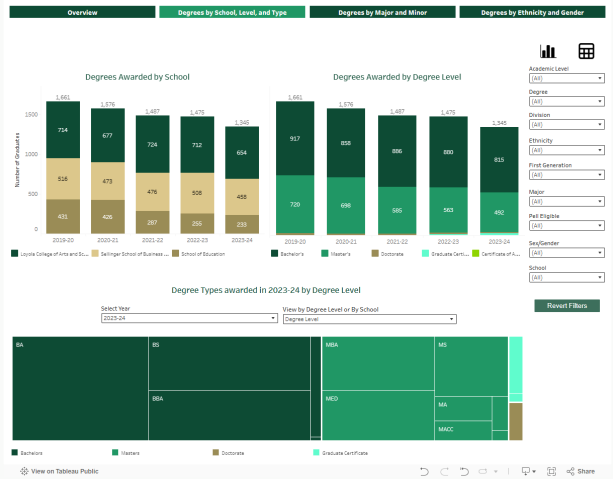
Solution: create documentation of each dashboard to ensure consistency across creators

Fact Book - Undergraduate Admissions

Fact Book - Graduation and Retention



Fact Book - Degrees Awarded



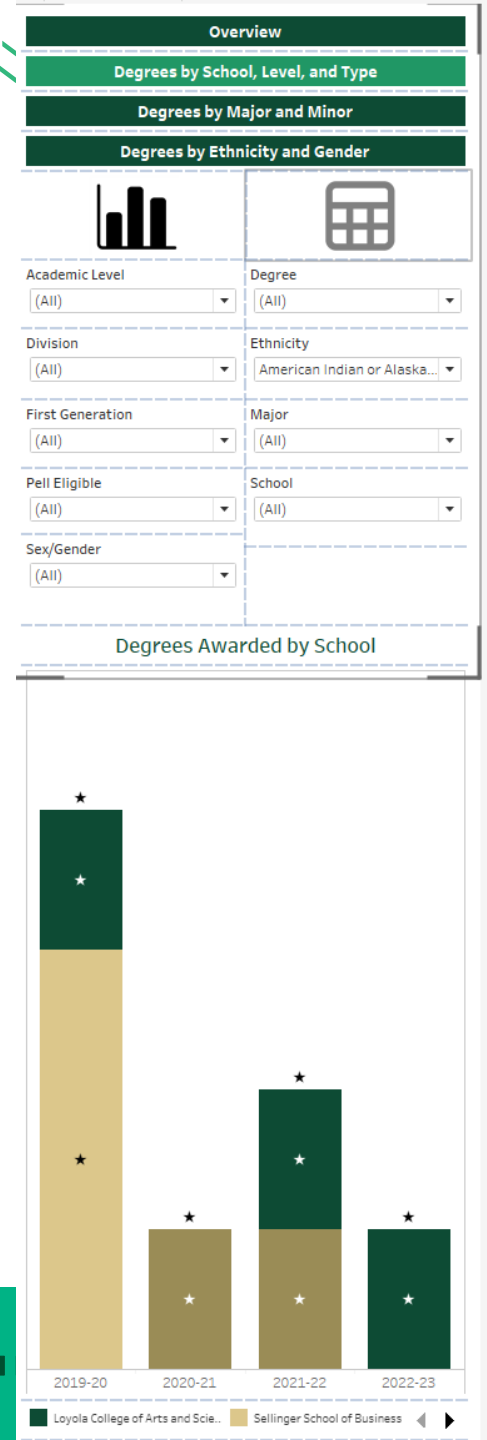
Fact Book - Graduate Admissions

PPT LINK: tinyurl.com/MDAIR25PPT

MOBILE VERSIONS

Why?

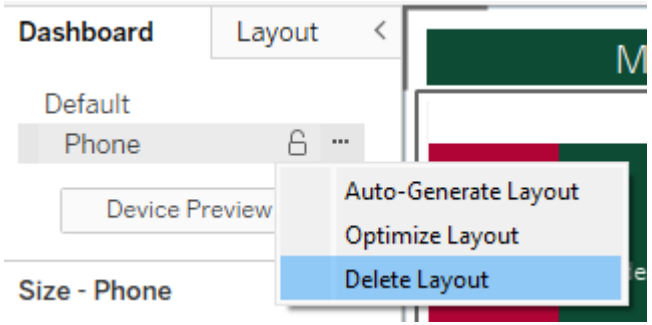
- Leadership has told us that during meetings, they often pull up the factbooks on their phones for some quick numbers.
- Potential students more likely to be looking on their phone over desktop.

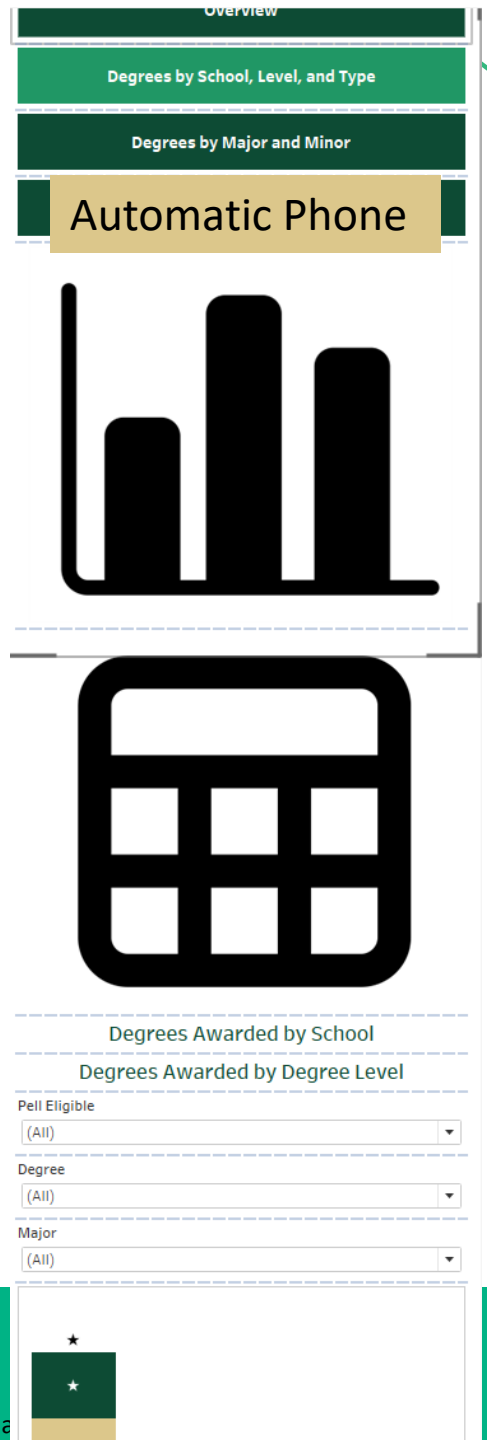


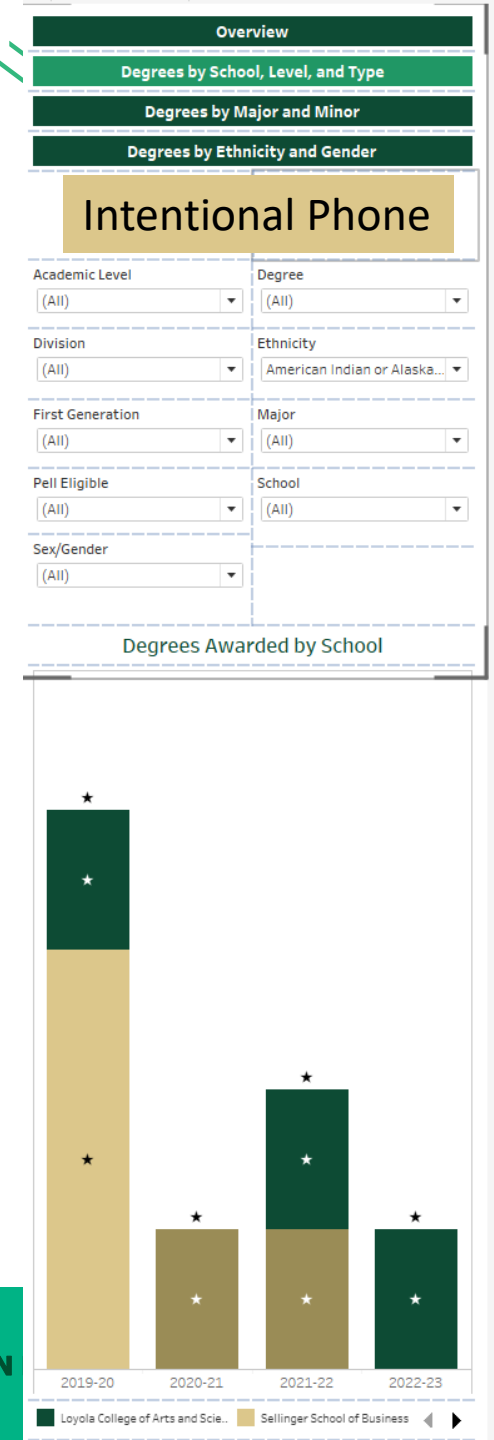
PPT LINK: tinyurl.com/MDAIR25PPT

MOBILE VERSIONS

Tableau automatically creates a phone layout – 99% of the time, it is terrible. If you are not ready for a phone version, make sure to delete that layout when publishing

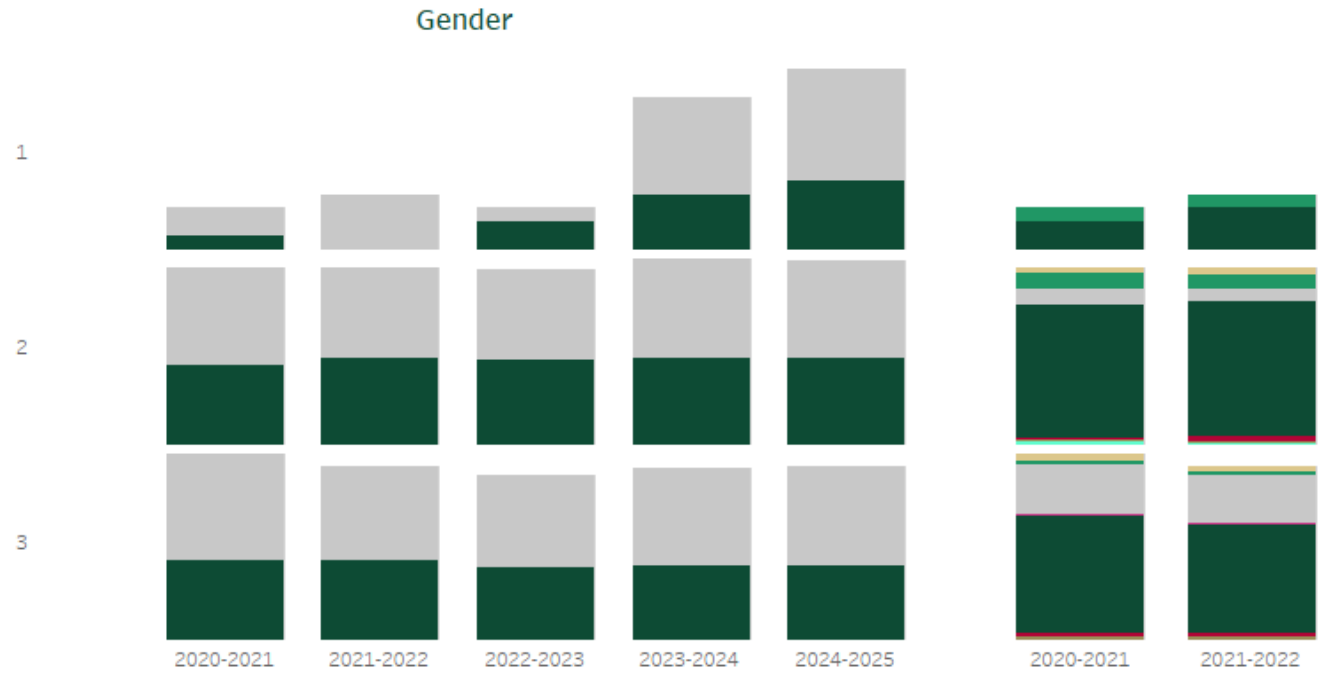






MOBILE VERSIONS

Not all charts/tables will work on desktop and mobile. The solution is to create a desktop, tablet, AND phone layout.



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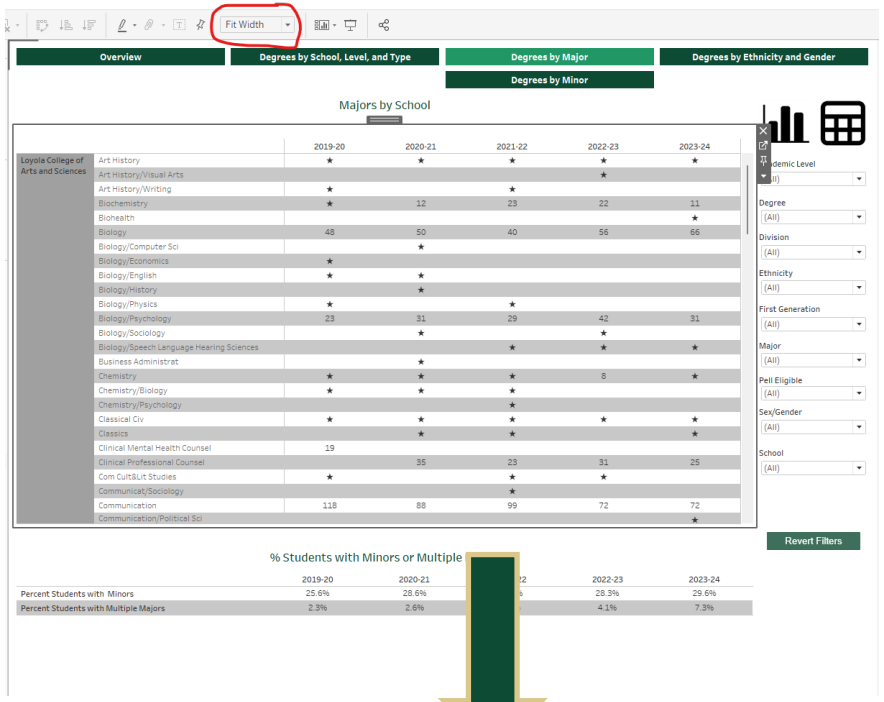
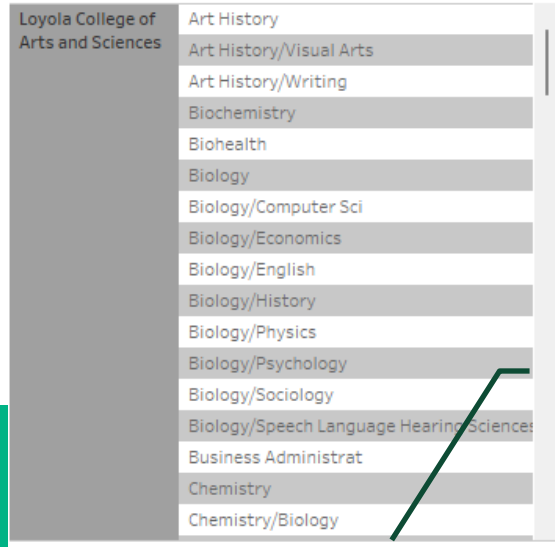
MOBILE VERSIONS

Not all charts/tables will work on desktop and mobile. The solution is to create a desktop, tablet, AND phone layout.

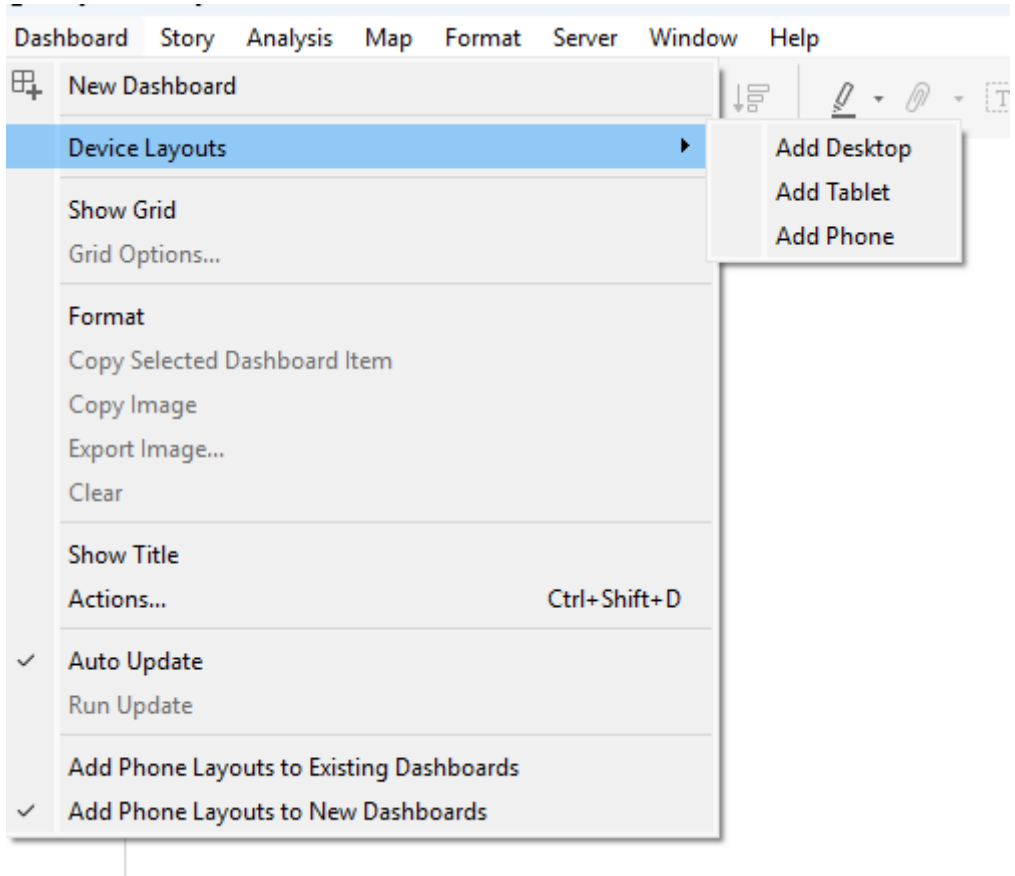




Notice how there is not a scroll bar to scroll side to side

MOBILE VERSIONS

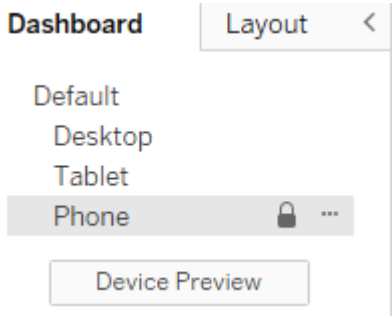
Not all charts/tables will work on desktop and mobile. The solution is to create a desktop, tablet, AND phone layout.



MOBILE VERSIONS

Not all charts/tables will work on desktop and mobile. The solution is to create a desktop, tablet, AND phone layout.

- Only items in the default layout can be added to specialty layouts



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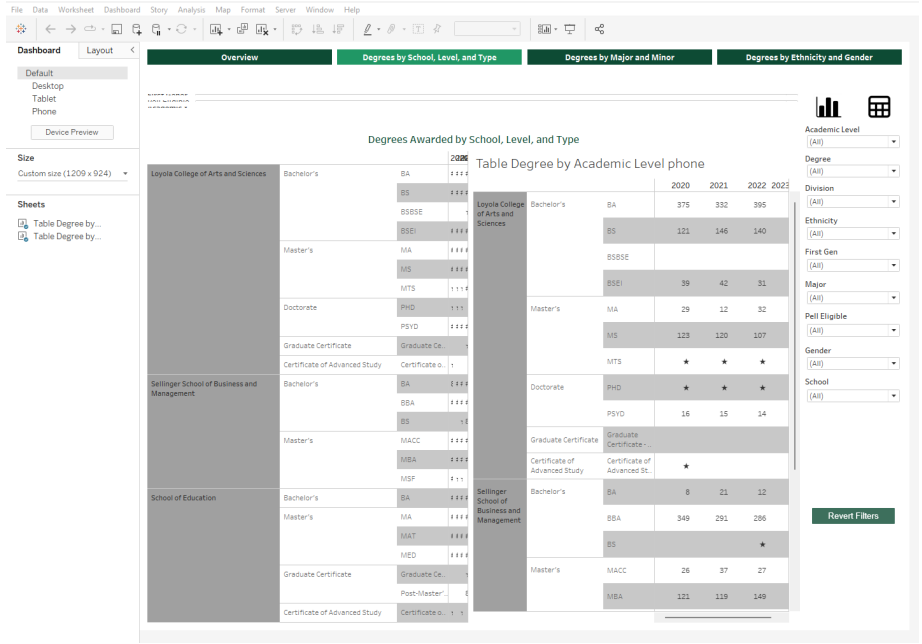
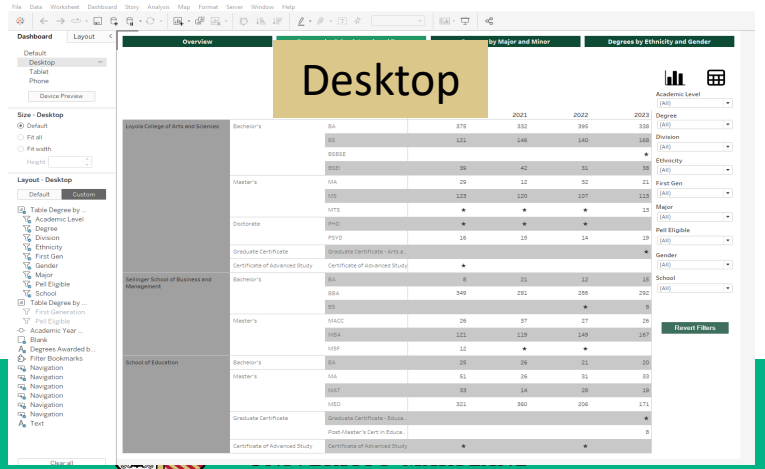
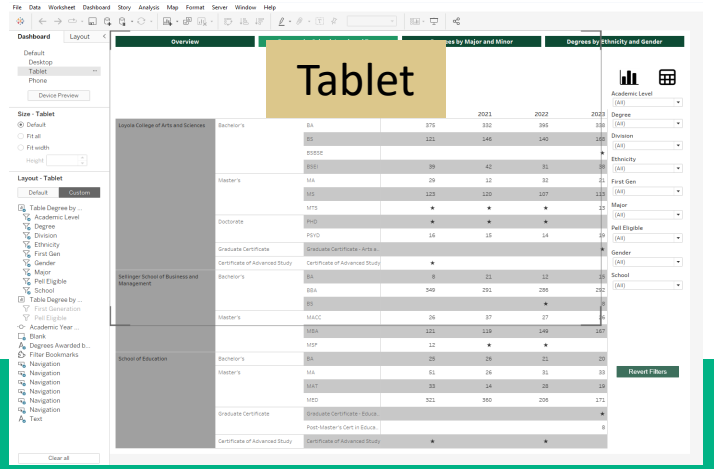
DEFAULT/DESKTOP/TABLET/PHONE



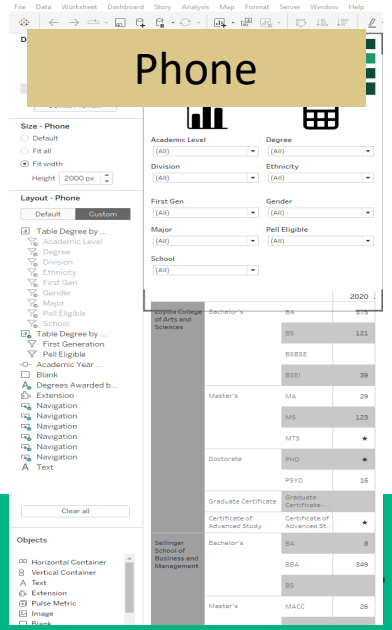
Desktop



Tablet



Phone



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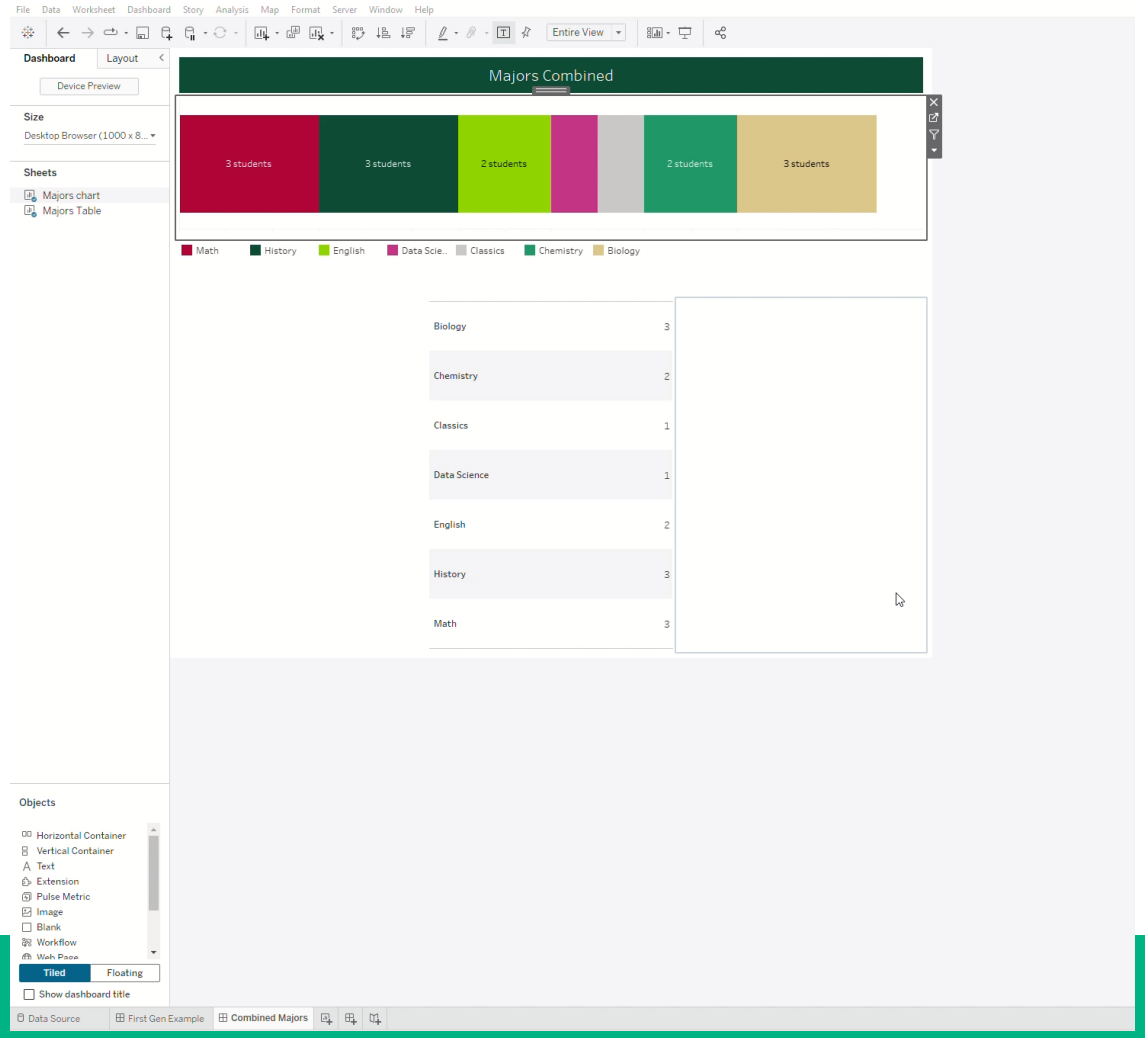
HOW TO #4: CREATING ADDITIONAL DEVICE VIEWS



PPT LINK: tinyurl.com/MDAIR25PPT

TABLE TALK

At your table, come up with **3 improvements** you can make to your own factbooks

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CONCLUSIONS

- New employee? Factbooks are a great way to get them familiar with your IR office.
- ~~Teamwork~~ Documentation makes the dream work.
- Incremental continuous improvement.

QUESTIONS

If you have questions that aren't answered feel free to connect with me rkuprenas@loyola.edu

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