Introduction to Course Evaluations in Tableau
A User’s Guide

Updated November 2016
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Please use the following bookmarks for easier navigation.

Short on time? Use the Quick Start guide.

To see descriptions of the numerical codes used in the reports, click here.

About Tableau
Logging into Tableau, security, and confidentiality
Types of reports in Tableau
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What instructors see in Tableau
What department users see in Tableau
A few words about crosslisted courses
Exporting and printing reports
SACES (what students see online)
Completing APT reports and forms
Getting help

What is Tableau?

Tableau Software is a data visualization tool. A dynamic, interactive reporting tool available on the web.

Once a report is created and uploaded to the Tableau Server, authorized users like you have the ability to manipulate the tables and figures to answer important questions about your course(s) or academic department(s).

Why use Tableau to report course evaluations?

Web-based data collection
Trinity College and its partners throughout the University are committed to resource sustainability. The
established pen-and-paper form used as many as 25,000 sheets of paper each term, plus an additional 1,500 envelopes, and countless pages of supplemental information. Moving the course evaluation system online greatly reduces the consumption of paper. Moreover, it makes the collection of data more agile, in that we can adapt more easily the content of the questionnaire and the corresponding reports as our collective reporting needs evolve.

The course evaluation questionnaire is issued to students via ACES Student Center. Likewise, the Instructor Course Description Form – through which faculty provide important information about the course – is available through the STORM Faculty Center. The questionnaires are administered by the SISS Office.

www.siss.duke.edu

Tableau as a complementary reporting tool

As we move the course evaluation form online, this is also a good opportunity to reassess the method by which we make evaluation reports available to the University community.

Through many conversations with faculty, undergraduates, graduate students, and department staff, the Office of Assessment Trinity College understood that course instructors and academic departments have diverse reporting needs and preferences. You need greater flexibility in the reporting of your course evaluation results. The flat PDFs previously uploaded to the Office of Assessment website required transcription if you wanted to report the findings in another document, thus consuming valuable time and introducing human error. The reports did not allow you to combine multiple courses into a single report, or slice the data by subgroups of students. The web portal through which you accessed the PDF reports did not extend access to the second instructor of a team-taught course. Finally, the previous reporting system did not capture or present to end users students’ written comments, which we all know to be valuable feedback about the course experience. Tableau meets all of these objectives.

tableau.oit.duke.edu

Logging-in, security, and confidentiality

If you will be a regular user of course evaluation reports, consider bookmarking tableau.oit.duke.edu. This is your point of access to the course evaluation reports starting with the Summer II 2013 process. Report PDFs generated for terms Spring 2005 through Summer I 2013 are no longer available online. To obtain a report for one of these terms, please contact the staff member who manages course evaluations for your program.

You will log-on with your netID and passcode.
Upon successful log-in, you will see a menu of documents to which you have been given access. It's possible you'll see a confusing array of documents and thumbnail images. To simplify navigation, click on Workbooks in the upper left. That will help organize your view.

A workbook is a compilation of two or more pages of reports. The title of the workbook for Fall 2013 course evaluations is titled, not surprisingly, *Fall 2013 Course Evaluations*. This menu shows who authored and uploaded the reports, and when the reports were most recently refreshed. Click on the Tableau icon or the Workbooks link in the upper left at any time to return to this menu.

**Faculty** will be authorized to view evaluation results for the courses in which they taught, as well as relevant comparison reports for the department, for all divisions, and for Trinity College overall. **Department-level users** (e.g., Directors of Undergraduate Studies, authorized staff assistants) are pre-assigned membership in a group for their department or program. By virtue of that membership, department-level users can access relevant reports. The Office of Assessment pre-assigned group membership in July 2013 November based on our existing records. With the assistance of academic departments, we completed an extensive audit of these records in November 2013. If you need to request a change to the group of individuals authorized to view department-level reports, please continue to submit such requests here: [http://bit.ly/CE_access](http://bit.ly/CE_access). Updates usually require 2-3 days to process. Department personnel with additional teaching responsibilities in that term will have access to both types of reports.

For those users who have previously requested the use of Multi-Factor Authentication (MFA) on all secure Duke University websites (e.g., Work@Duke, STORM), note that this update will extend to Tableau. Please contact OIT (919-684-2200) with questions about web authentication.

### Different types of reports in Tableau

After clicking on the workbook link for Fall 2013 Course Evaluations (or any term you wish), you will see all or a subset of the following reports (aka dashboards). When the evaluation reports are published to the Tableau Server for viewing, particular permissions, settings, and filters (established through a link between Active Directory and Tableau) will control the reports you are permitted to see. Rest assured that other users will not see any unauthorized reports.

Faculty are provided reports for their individual course(s) including both numerical results and students' written comments. They also receive summary information for the department or program in which their course(s) is/are housed, as well as summaries of course evaluation results for individual academic divisions and for Trinity College overall. Department-level users also receive summary information for use in APT reports.

Please see the following sections for details about the reports available to faculty and department-level users.

### What instructors see:

[Tableau CE users guide](https://assessment.trinity.duke.edu/Tableau_CE_users_guide.htm)
What department users (Chairs, staff assistants) see:

General information about the reports

We fully understand that it takes a bit of time to get used to a new system, especially since you have more options and capabilities in Tableau. Don’t hesitate to call the Office of Assessment (see the Help section below) if you need a hand.

Rather than trying to follow these screen shots, try logging into tableau.oit.duke.edu. You will have access to the reports if you taught and evaluated a class in during or after Summer II 2013, or if you are an administrator or staff member of an academic department that offered an undergraduate course from Summer II 2013 forward. Remember that different users will have access to different reports and different data. The information presented in this section pertains to all reports, generally.

One you’re in the workbook of your choice (e.g., Fall 2013 Course Evaluations), then click on any of the reports. Right away, notice that there’s a menu of reports along the top of the screen. You can choose which report (aka dashboard) you wish to use, either from this menu or by returning to the main Tableau homepage.

In general, the reports give you most of the information you used to obtain from the old PDF reports from the old paper system. However, you have the following additional capabilities in Tableau:

* You can select or deselect any group or groups of questions. The standard four question groups pertain to quality of the course, course dynamics, quality of instruction (instructor 1), and the Trinity College learning objectives. Additional question groups available for use pertain to the Modes of Inquiry (plus...
Quantitative Studies) that may pertain to the course under review.

- You can select or deselect a course or courses from this view. This is especially helpful if you wish to aggregate the results across several or all of your classes.

**Course identifying labels**

In most cases, the course report is titled using the owning subject and catalog number. You may notice that, very occasionally, the course report is titled in an apparently arbitrary way: for example, PUBPOL 290S.01 may bear the title AAAS 290S.01 in Tableau. These infrequent cases occur because ownership is not clear in our SISS queries. In such cases, and given the way SISS codes and labels course ownership, primary subjects, and crosslisted subjects, there may be no clear and systematic rules to guide the labeling of course data for reporting. The information contained in the report is accurate, and it represents all student respondents enrolled in the course.

**Access to reports**

Note that access to a course-level report is made on the basis of the instructor’s netID (and co-instructor’s netID, if applicable). In the case of team-taught courses, both individuals will have access to the evaluation data. Also, the course-level report aggregates data across cross-lists.

**Filtering the reports**

Most importantly, users should understand that access to reports is determined by one’s net ID and any groups (in Active Directory) to which the user belongs. The reports themselves use net IDs as a “filter”, to determine who gets access to which data.

Filtering also means that you, the user, can select a cross-section of data you wish to see in the report. At present, you may filter reports on the basis of the questions asked, departments or courses (only those you are eligible to see), class size, and for departmental staff only students’ class standing (e.g., first year, sophomore, etc.). These “quick filters” are associated with one another. If you select Biology from among the departments whose data you are eligible to see, the list of courses you may select from will automatically narrow down to only Biology. If you manually select specific Focus Program courses from your list, you will see that the menu for class standing now only first-year students.

**Evaluating the Modes of Inquiry (and Quantitative Studies)**

The student questionnaire includes questions pertaining to the Modes of Inquiry (and/or Quantitative Studies code) relevant for the course. If a course is coded as Ethical Inquiry, then the report will include results pertaining to that question set. If you wish to review students’ ratings on these items, simply choose the desired Mode of Inquiry question set from the Choose Questions quick filter.

If the course is not coded as EI, for example, the students were not asked to evaluate the Ethical Inquiry questions. In such cases, if the user were to select the Ethical Inquiry question set to include in the report, that section of the report would be blank.
Seeing full text and labels
There’s a lot of information in these report dashboards. The reports were designed to maximize your view, however there may be situations where the question text looks cut-off. To see the full text of the question and labels for the numerical values, use your mouse to hover over that part of the table. (If you were to export the table as cross-tabs, the full text would appear in the exported Excel document. See the section on Exporting and Printing below.)

Blank pages
In the event that no students complete the evaluation form or an instructor did not complete the Instructor Course Description Form, the Tableau report will be blank. Do not be alarmed or assume there is a problem with the reports themselves. Please contact the Office of Assessment (assessment@duke.edu) to inquire about submissions for your course.

What faculty see
Faculty who have no other administrative roles in the academic department have access to the following:
Basic course reports

This report is new for spring 2014. It is intended to mimic the old single-page PDFs previously available in the old paper process. This report contains N, mean, standard deviation, and a frequency distribution for the questions in each of the following question categories: Quality of course, Quality of instruction, Evaluation of instructor 1, and Trinity College learning objectives. It also includes a summary of students' recommendations, as well as some of the information submitted on the Instructor Course Description Form.

This report contains students' written comments at the bottom. To maintain a format in which the report can be printed as a single-page, the written comments were placed in a small table under the matrix of numerical ratings. Given the truncated formatting of this written response table, it would be difficult to review comments online. Instead, we suggest that you export this table to Excel (as cross-tabs) or PDF for use offline.

The instructor can print this as a single-page PDF. At the top of the Tableau view, find the icon for Export and Printing, then select PDF. When the Export PDF window opens, we recommend selecting Landscape, then Content: This Dashboard.
**Instructor report: Written comments**

This report provides all of the qualitative responses to the five open-ended questions on the evaluation form. Students are instructed to limit their responses to 1000 characters. The instructor can review all of her classes together, or select specific classes. The instructor also can select student-respondents by class standing. The results are best exported via cross-tabs. (See the section on Exporting and Printing below.)

To access the written comments for a class, first select the class on the Basic Report tab, then click on the green arrow to launch the written comments.

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**Instructor report: Extended**

This report provides the total number of responses, the averages, and the frequency distribution for most of the questions asked on the evaluation form. These values are presented in tables. The instructor can review all of her classes together, or select specific classes. Unlike the Basic report (see above), the Extended report provides access to all of the questions on the student form, and it allows aggregations across multiple classes.

The report includes all submissions from all crosslists. Instructors cannot separate results from one crosslist. The report is available to the first two instructors in a team-taught course.
**Instructor report: Faculty form**

This report lists the selections made on the Instructor Course Description Form including the importance rating assigned to each of nine Trinity College learning objectives, the expected time commitment outside of class, and the instructor’s SACES opt-in or opt-out status. The instructor can review all of her classes together, or select specific classes.

Instructors submit only one Instructor Course Description Form for the course, regardless of any crosslists, so there’s no possibility of redundant submissions from crosslists.
**Instructor report: Department comparisons**

The purpose of the report is to provide comparative information so that course instructors can draw meaningful conclusions about their students’ experience compared to some institutional norms. This report provides the total number of responses, the averages, and the frequency distribution for most of the questions asked on the evaluation form, in the aggregate, for relevant departments.

Instructors have access to aggregate data for the departmental “home” of the course, as well as the academic departments with which their courses are crosslisted. They will not have access to individual course reports for other courses within those departments.

**Instructor report: Division and College comparisons**

This report provides the total number of responses, the averages, and the frequency distribution for most of the questions asked on the evaluation form, in the aggregate, for Trinity College and each of the academic divisions (Humanities, Natural Sciences, Social Sciences, and Other). The purpose of the report is to provide comparative information so that course instructors can draw meaningful conclusions about their students’ experience compared to some institutional norms. All faculty and department personnel have access to these reports.

### Aggregate report for select department(s)

<table>
<thead>
<tr>
<th>Course area</th>
<th>Mean</th>
<th>SD</th>
<th>N</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course seeing</td>
<td>5.00</td>
<td>0.0</td>
<td>16</td>
</tr>
<tr>
<td>Course Dynamics</td>
<td>4.75</td>
<td>0.5</td>
<td>18</td>
</tr>
<tr>
<td>Instructor 1 (Primary)</td>
<td>5.00</td>
<td>0.0</td>
<td>16</td>
</tr>
<tr>
<td>Instructor 2 (Alternate)</td>
<td>5.00</td>
<td>0.0</td>
<td>16</td>
</tr>
<tr>
<td>Instructor 1 prepared theory and helpful feedback on my work performance</td>
<td>5.00</td>
<td>0.0</td>
<td>16</td>
</tr>
<tr>
<td>Instructor 2 prepared theory and helpful feedback on my work performance</td>
<td>5.00</td>
<td>0.0</td>
<td>16</td>
</tr>
<tr>
<td>Instructor 1 focussing and helping students outside of class</td>
<td>5.00</td>
<td>0.0</td>
<td>16</td>
</tr>
</tbody>
</table>

### Choose subjects

- [X] Humanities
- [X] Social Sciences
- [X] Other

To view a list of codes for each set of questions on the evaluation form, visit http://assessment.trinity.duke.edu/
codes.htm

To view the Users Guide for course evaluations in Tableau, visit http://assessment.trinity.duke.edu/
users_guide.htm
What department administrators and staff see

Department Chairs, Directors of Undergraduate Study, and other authorized personnel have access to the following:

Department report: Courses evaluated

This worksheet lists all course evaluated on behalf of the department, with the names of instructor 1 and instructor 2 (if applicable). The list includes courses owned by the department and courses crosslisted with the department and to which the user has access. The user can select a specific department, instructor, and/or course(s) to make the list more manageable. The table provides the total enrollment for the course (based on all crosslists combined), the total number of evaluations submitted, and a calculated return rate.

Note that, in the case of team-taught classes, the first individual in the list is Instructor 1, and the second
individual is Instructor 2. These designations are important for distinguishing the Instructor 1 and Instructor 2 ratings in subsequent reports.

Also, be aware that you can NOT click on an individual course to view the report for that course.

Department access: Instructor report
This report is new for spring 2014. It is intended to mimic the old single-page PDFs previously available in the old paper process. This report contains N, mean, standard deviation, and a frequency distribution for the questions in each of the following question categories: Quality of course, Quality of instruction, Evaluation of instructor 1, and Trinity College learning objectives. It also includes a summary of students' recommendations, as well as some of the information submitted on the Instructor Course Description Form. We provide this report format to department personnel so that they can rapidly print/save single-page reports on behalf of requesting faculty.
The user can print this as a single-page PDF. At the top of the Tableau view, find the icon for Export and Printing, then select PDF. When the Export PDF window opens, we recommend selecting Landscape, then Content: This Dashboard.

Department report: Extended

By default, the user sees aggregated data for all courses to which he or she has access. The user may select specific course(s) as needed. These values are presented in tables. The department user can review all of her classes together, or select specific classes. The department user also can select courses of a particular size (small, medium, or large) and student-respondents by class standing.

The report includes all submissions from all crosslists. Instructors cannot separate results from one crosslist.
### Department report: Means by course

This report is new for spring 2014. Understanding that department users often need a quick summary of item means by course, including a calculated value for the APT report requirement "Measure of demand", we are providing a supplemental table.

Note that, in the case of team-taught classes, the first individual in the list is Instructor 1, and the second individual is Instructor 2. These designations are important for distinguishing the Instructor 1 and Instructor 2 ratings.

The results are best exported via cross-tabs. (See the section on Exporting and Printing below.)

<table>
<thead>
<tr>
<th>Instructor</th>
<th>Course Dynamics</th>
<th>Learning Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructor 1</td>
<td>The instructor explained material clearly and in a way that enhanced understanding.</td>
<td>Gaining factual knowledge</td>
</tr>
<tr>
<td>Instructor 1</td>
<td>The instructor used effective class dynamics and atmosphere conducive to learning.</td>
<td>Learning to analyze ideas, arguments, and points of view.</td>
</tr>
<tr>
<td>Instructor 1</td>
<td>Instructor 1 was enthusiastic about the course.</td>
<td>Learning to apply knowledge, concepts, principles, or theories to a specific situation.</td>
</tr>
<tr>
<td>Instructor 1</td>
<td>Instructor 1 was well-prepared.</td>
<td>Learning to conduct inquiry through methods of the field.</td>
</tr>
<tr>
<td>Instructor 1</td>
<td>Instructor 1 was willing to answer questions.</td>
<td>Learning to evaluate the merits of ideas and competing claims.</td>
</tr>
<tr>
<td>Instructor 1</td>
<td>Instructor 1 was respected by peers.</td>
<td>Learning to synthesize and integrate knowledge.</td>
</tr>
<tr>
<td>Instructor 2</td>
<td>The course was well-structured and organized.</td>
<td>The course was intellectually stimulating and made me think.</td>
</tr>
<tr>
<td>Instructor 2</td>
<td>The grading procedures were appropriate and fair.</td>
<td>The course was intellectually stimulating and made me think.</td>
</tr>
</tbody>
</table>

(See the section on Exporting and Printing below.)
**Department report: Faculty form**

For all courses to which the user has access, this report lists the selections made on the Instructor Course Description Form including the importance rating assigned to each of nine Trinity College learning objectives, the expected time commitment outside of class, and the instructor’s SACES opt-in or opt-out status. The user can review all classes together, or select specific classes. Instructors submit only one Instructor Course Description Form for the course.
Department report: APT

This table separates undergraduate and graduate level courses (catalog numbers 1-499, and 500 and above), and provides average student responses for select questions on the student evaluation form. If the user is authorized to view course evaluation data for multiple departments, the user will see all departments in the filter at right.

Note that the values in the "Graduate" column do not represent evaluation data for all graduate-level classes in a program, only the courses in your program or crosslisted with your program that were evaluated within Trinity College (that is, those with one or more undergraduates enrolled).
Department report: Division and College comparisons

This report provides the total number of responses, the averages, and the frequency distribution for most of the questions asked on the evaluation form, in the aggregate, for Trinity College and each of the academic divisions (Humanities, Natural Sciences, Social Sciences, and Other). The purpose of the report is to provide comparative information so that departmental administrators can draw meaningful conclusions about their department's teaching compared to some institutional norms. All faculty and department personnel have access to these reports.

<table>
<thead>
<tr>
<th>Trinity College and Divisional Reports</th>
<th>N</th>
<th>Mean</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course Quality</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Give an overall rating for quality of the instructor</td>
<td>2,307</td>
<td>4.37</td>
</tr>
<tr>
<td>Give an overall rating for the quality of this course</td>
<td>3,268</td>
<td>4.34</td>
</tr>
<tr>
<td>How effective was this course for you?</td>
<td>2,307</td>
<td>4.30</td>
</tr>
<tr>
<td>User overall satisfaction with the course</td>
<td>2,307</td>
<td>4.36</td>
</tr>
<tr>
<td>Overall, how much did you learn in this course?</td>
<td>2,307</td>
<td>4.37</td>
</tr>
<tr>
<td>Course Vignette</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The course assignments (paper, projects, grade, etc., helped me learn)</td>
<td>2,307</td>
<td>4.13</td>
</tr>
<tr>
<td>The course expectations and requirements were clear</td>
<td>2,307</td>
<td>4.19</td>
</tr>
<tr>
<td>The course materials, textbooks, labs, online, etc., engaged my interest</td>
<td>2,307</td>
<td>4.19</td>
</tr>
<tr>
<td>The course was intellectually stimulating and made me think</td>
<td>2,307</td>
<td>4.49</td>
</tr>
<tr>
<td>The course was well-structured and organized</td>
<td>2,307</td>
<td>4.49</td>
</tr>
<tr>
<td>The grading procedures were appropriate and fair</td>
<td>2,307</td>
<td>4.45</td>
</tr>
<tr>
<td>Instructor 1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Instructor 1 explained material clearly and in a way that enhanced understanding</td>
<td>2,307</td>
<td>4.29</td>
</tr>
<tr>
<td>Instructor 1 taught in a manner that engaged students</td>
<td>2,307</td>
<td>4.45</td>
</tr>
<tr>
<td>Instructor 1 helped students understand and master the subject matter</td>
<td>2,307</td>
<td>4.45</td>
</tr>
<tr>
<td>Instructor 1 provided timely and helpful feedback on work and performance in the course</td>
<td>2,307</td>
<td>4.47</td>
</tr>
<tr>
<td>Instructor 1 was enthusiastic about the course</td>
<td>2,307</td>
<td>4.68</td>
</tr>
<tr>
<td>Instructor 1 was well-prepared</td>
<td>2,307</td>
<td>4.46</td>
</tr>
<tr>
<td>Instructor 1 was convincing, honest, and helpful to students outside of class</td>
<td>2,307</td>
<td>4.40</td>
</tr>
<tr>
<td>Please rate the overall quality of instruction from this instructor (instructor 1)</td>
<td>2,307</td>
<td>5.00</td>
</tr>
<tr>
<td>Trinity College Learning Objectives</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Learning basic understanding of knowledge</td>
<td>2,307</td>
<td>5.97</td>
</tr>
<tr>
<td>Learning to analyze ideas, arguments, and evidence</td>
<td>2,307</td>
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A few words about crosslisted courses

The use of crosslists enables a partnership between academic departments and disciplines that have complementary expertise in the curriculum of a course. By extension, the Office of Assessment recognizes the value of sharing relevant course evaluation results with all stakeholders.

In the development of the reports in Tableau, the Office of Assessment preserves your access to evaluation results for cross-listed classes. Note, though, that courses usually will bear the label subject catalog.section of the course owner. For example, although EOS and ENVIRON may be crosslisted with BIOLOGY 288.01, departmental users in the EOS and ENVIRON programs will see the evaluation results labeled as BIOLOGY 288.01.

In most cases, the course report is titled using the owning subject and catalog number. You may notice that, very occasionally, the course report is titled in an apparently arbitrary way: for example, PUBPOL 290S.01 may bear the title AAAS 290S.01 in Tableau. These infrequent cases occur because ownership is not clear in our SISS queries. In such cases, and given the way SISS codes and labels course ownership, primary subjects, and crosslisted subjects, there may be no clear and systematic rules to guide the labeling of course data for reporting. The information contained in the report is accurate, and it represents all student respondents enrolled in the course.

Aggregate departmental reports include only the results for courses owned by and crosslisted with that department. An instructor will have access to aggregate departmental results for the department(s) with which his or her course is crosslisted. Again, following our BIOLOGY 288.01 example, the instructor will have access to department reports for BIOLOGY, EOS, and ENVIRON.

Using, printing, exporting from Tableau

In the past, one of the most frequent comments received by the Office of Assessment was the difficulty of using the information in the PDF files downloaded from assessment.aas.duke.edu/evaluations. That is, a user might have had to reformat the PDF as an image to paste into another document, or transcribe the values in Excel to eventually create a graph or figure. Tableau gives you more options for using and exporting the contents of your reports.

Look for a small rectangular icon sitting above the reports. When clicked, this icon opens a menu of four different print options: Image, Data, Crosstabs, and PDF. Depending on the view, some of the options may be deactivated.

The table below summarizes each of these print/export options, and our recommendations for using these options most effectively.

<table>
<thead>
<tr>
<th>Tableau_CE_users_guide</th>
<th><a href="https://assessment.trinity.duke.edu/Tableau_CE_users_guide.htm">https://assessment.trinity.duke.edu/Tableau_CE_users_guide.htm</a></th>
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<th><a href="https://assessment.trinity.duke.edu/Tableau_CE_users_guide.htm">https://assessment.trinity.duke.edu/Tableau_CE_users_guide.htm</a></th>
</tr>
</thead>
</table>

The table below summarizes each of these print/export options, and our recommendations for using these options most effectively.
<table>
<thead>
<tr>
<th>When to use?</th>
<th>How to use?</th>
</tr>
</thead>
<tbody>
<tr>
<td>When you want a screen capture of exactly what you see on your monitor.</td>
<td>Click on the Export icon, select PDF. Choose Landscape, then Content: This Dashboard. Click Export.</td>
</tr>
<tr>
<td>When you want to print or export the full, unconstrained content of a report. Best to use when your report has scroll bars, and you need your print-out to include information you have to scroll to view.</td>
<td>Click on the Export icon, select PDF. Choose Portrait, then Content: Sheets in Dashboard. Click Export. It may take a few minutes.</td>
</tr>
<tr>
<td>Rarely recommended. This option produces a report many pages longer than you need, and the extensive content may make interpretation and summary difficult.</td>
<td>You must click within the table you wish to export. A thin gray border will appear around the table. Choose Portrait, then Content: Sheets in Workbook. Click Export. It may take a few minutes.</td>
</tr>
<tr>
<td>When you wish to work with evaluation results in Excel. When you need all text to be visible, unconstrained by cell boundaries.</td>
<td>You must click within the table whose data you wish to export. A thin gray border will appear around the table. You will be prompted to Download the image, then open it in your preferred viewer or save it to a file location of your choice.</td>
</tr>
<tr>
<td>To add an excerpt from a report to an email or to paste into another document (e.g., MS Word).</td>
<td>You must click within the table whose data you wish to export. A thin gray border will appear around the table. Click on the Export icon, select Data.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Department report: Courses evaluated</th>
<th>PDF: This Dashboard</th>
<th>Recommended</th>
<th>Recommended</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department access: Instructor reports</td>
<td>PDF: Sheets in Dashboard</td>
<td>Recommended</td>
<td>Recommended</td>
</tr>
<tr>
<td>Department report: Extended</td>
<td>PDF: Sheets in Workbook</td>
<td>Recommended</td>
<td>Recommended</td>
</tr>
<tr>
<td>Department report: Means by course</td>
<td>Cross-tabs</td>
<td>Recommended</td>
<td>Recommended</td>
</tr>
<tr>
<td>Department report: Faculty form</td>
<td>Image</td>
<td>Recommended</td>
<td>Recommended</td>
</tr>
<tr>
<td>Department report: APT</td>
<td>Data</td>
<td>Recommended</td>
<td>Recommended</td>
</tr>
<tr>
<td>Department report: Open-ended</td>
<td></td>
<td>Recommended</td>
<td></td>
</tr>
</tbody>
</table>
CAUTION: For all of these printing and exporting options, be aware that Tableau will print or export the content of the tables or figures as you have defined them. As you use these products, be mindful of any filters you may have applied (e.g., class size, or student class standing), and the departments and/or courses the reports represent.

Obtaining raw data from Office of Assessment
About 15 academic departments currently request and receive raw course evaluation data from the Office of Assessment each term. To promote and support assessment work at the department level, we are happy to discuss with you your research questions and data needs. Please email Matt Serra (serram@duke.edu) or Jennifer Hill (jlh9@duke.edu) to request or ask any questions about your raw course evaluation data. Please note that most identifying student information will be removed from these data products.

SACES
In the past, Trinity College instructors have been able to opt-into the Student Accessible Course Evaluation System (SACES). An “opt-in” selection on the Instructor Course Description Form informs the Office of Assessment that we should post course evaluation results for students to view via ACES.

The Office of Assessment remains committed to sharing evaluation results on behalf of interested faculty.

Given our new capabilities in Tableau, we currently are exploring other approaches to the publication of course evaluation results. For the time being, however, we will continue to use the existing SACES interface to post results for faculty who have opted-into this system. We will inform academic departments if and when these procedures change, and they will inform their faculty as necessary.

assessment.aas.duke.edu/evaluations/saces

Completing reports for APT
Faculty Affairs requires specific course evaluation information to support the process of appointment, promotion, and tenure. When working with APT, staff in academic departments are asked to complete the following grid on behalf of individual faculty. Most of the information requested by this grid are available in
the Department reports in Tableau. Each line in the grid refers to a unique course in a specific term.

<table>
<thead>
<tr>
<th>Semester</th>
<th>Course #</th>
<th>Course Title</th>
<th>Enrollment</th>
<th>Evaluations Received</th>
<th>Overall Instructor Rating</th>
<th>Overall Course Rating</th>
<th>Measure of Demand</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

**Semester:** Please manually enter the semester in which a course was taught.

**Course number, Enrollment, Evaluations received:** These values are available on the Department report: Course evaluated worksheet. (See image below.) **Course number** refers to the course catalog number, such as 101, 99D, 161L, etc. **Enrollment** is inclusive of all students on the course roster, across all cross-lists. The number of **evaluations received** is inclusive of all student forms started and/or submitted, across all cross-lists.

**Course title:** The title is not provided in the Tableau reports. Please consult your own records, or the course information available in STORM.

**Overall instructor rating, Overall course rating, Measure of Demand:** You may find these values in several places in Tableau. Perhaps the easiest way to obtain these values is to open and review the worksheet Department report: Means by course. (See image below.) This grid provides summary means by course for all of the courses housed within or crosslisted with your department. For **Overall instructor rating**, in the question group "Instructor 1", look for the results for question Please rate the overall quality of instruction from this instructor (instructor 1). In the event that a course is team-taught, you should select the question group "Instructor 2" from the filter at right, and look for the results for question Please rate the overall quality of instruction from this instructor (instructor 2). Distinguishing evaluation results by instructor in a team-taught course is an ongoing issue. Students completing the evaluation form select an instructor's name from a menu and provide evaluation ratings for that individual. At present, the reports do not connect the individual instructor's name with the results. The Office of Assessment is working on a way to link the student's selection of instructor 1 versus instructor 2, but that feature is not yet available. For **Overall course rating** look for the results for Give an overall rating for the quality of this course. For **Measure of Demand**, look for the calculated results for Measure of Demand: Average of effort and difficulty of the subject matter.
Departmental Average #000 through #199 and Departmental Average #200+: This requirement refers to an overall departmental average for undergraduate courses and graduate courses, respectively. Note that as of fall 2012, undergraduate courses now are represented by catalog numbers 0-499 and graduate courses begin at 500. The Trinity College reports are labeled accordingly. Refer to the worksheet Department report: APT. This report provides overall instructor rating, overall course rating, and measure of demand separately for undergraduate courses and graduate courses. Note that the values in this table also may include crosslisted courses owned by other departments or programs. Also, the values in the "Graduate" column do not represent evaluation data for all graduate-level classes in a program, only the courses in your program or crosslisted with your program that were evaluated within Trinity College (that is, those with one or more undergraduates enrolled).

The APT grid requires a summary across terms. You must take these term-specific departmental averages (overall instructor rating, overall course rating, and measure of demand) and average them across all of the terms for which you are submitting the instructor's evaluation results.

Need help?
If you have technical problems accessing the course evaluation questionnaires (student or faculty) in SISS/ACES/STORM, please contact the OIT Help Desk at 919-684-2200. Note that evaluation forms typically are available only for two weeks prior to the last day of class. Exceptions exist for select graduate-level classes and study abroad classes.

If you have general questions about the development or use of course evaluations, please contact the Office of Assessment, Trinity College, at assessment@duke.edu or 919-668-1617. Questions about the use of evaluation results for APT should be directed to the Provost's Office for Faculty Affairs (https://trinity.duke.edu/faculty-affairs).

If you have technical questions about the use of Tableau, please contact the Office of Assessment, Trinity College, at assessment@duke.edu or 919-668-1617.