

Guidelines for Tableau Desktop Licenses

Date

July 11, 2017

Brief Summary:

The University supports the use of Tableau desktop, for the purpose of creating and publishing worksheets, dashboards, and stories to a Princeton Tableau server. Licenses are provided, at no cost, to designated populations within the Princeton community. Below are the terms and conditions for obtaining a desktop license.

Tools Affected:

- Tableau

Description/Details

The University supports the use of Tableau desktop, a fat-client application installed for the purpose of creating and publishing worksheets, dashboards, and stories to a Princeton Tableau server. CeDAR has been charged with the task of managing its distribution, maintenance, and usage as well as providing direct support to current and potential license holders for training, documentation, and creation of the visualizations identified above. Licenses are provided, at no cost, to designated populations within the Princeton community. These populations include:

- Princeton staff working in administrative departments
- Princeton staff working in academic departments
- Full-time faculty
- Part-time faculty and/or researchers working under the auspices of faculty
- Any other group with special circumstances

Students are not eligible for Tableau licenses but may contact Tableau directly to arrange an educational license. Students who are working with faculty or researchers on University projects must be sponsored to receive a license. The license, however, will be registered to the name of the faculty member or researcher. At the present time, the Office of Development manages its own instantiation of Tableau and is not subject to these guidelines.

An alternative to a full Tableau desktop license is the Tableau Interactor. Using only a browser, and at no cost to the University, Interactors with proper security may access, manipulate, modify and, in certain situations, create visualizations on the Tableau server. For a more detailed explanation of this option, please email CeDAR at the following address: cedar@princeton.edu.

In order to qualify for a Tableau desktop license, the following criteria must be met:

- The requestor must complete the Basic Tableau training class, offered on a regular basis by CeDAR. Once the class has been completed, the requestor must receive an endorsement from their work supervisor as well as providing a brief description of the type of analyses being considered with Tableau.
- Eligible requestors may be exempt from the training class requirement if they can demonstrate competency with Tableau, having used the software either prior to coming to Princeton or in a University role prior to these guidelines being in effect. They still must receive the endorsement from their supervisor.
- If another member of a requestor's work group has been issued a license, the requestor must provide a rationale that describes why being designated as an Interactor (no desktop license needed) will not provide the appropriate solution.

In order to ensure that the Tableau program is being managed properly and that the University is spending its funds in a prudent fashion, the following conditions are provided:

- On an annual basis, all recipients of desktop licenses will be required to complete a short recertification survey with questions relating to actual use during the most recent year or a clear statement of intended use during the coming year. This recertification process will occur each July.
- License holders who are not able to provide such documentation will need to relinquish their licenses. Failure to complete the survey will also result in the loss of a license.
- License holders who leave the University must surrender their license as part of the normal separation process. Work supervisors are asked to notify CeDAR in the case of separation. CeDAR will also monitor the weekly separation reports to ensure compliance with this condition.

Receipt and use of a Tableau Desktop license does not automatically grant access to any data. Access to data is managed by the respective Data Steward.