

# Tableau Report Developer Acceptable Use Policy

## Authority:

Office of the Provost

## 1. Policy

Tableau report developers have the ability to import many types of data into Tableau, including data which is considered Sensitive or Restricted (See UNC Charlotte's Data Classification standard for more information). The purpose of this policy is to document the data security stipulations Tableau report developers must agree to in order to create and provide access to Tableau reports using UNC Charlotte licensed Tableau software. Access to the Tableau Pro Desktop licenses purchased under the UNC Charlotte site license agreement, and to the OIT administered Tableau Enterprise server, will be granted by the Institutional Research Office upon agreement to these stipulations.

It is the Tableau report developer's responsibility to restrict access to each individual report published on the server only to those individuals permitted to see the data displayed in the report.

Storage of Social Security numbers or Family Education Rights and Privacy Act (FERPA) on the Tableau system is prohibited.

When credentials are stored to automate data updates, data must be stored with the reports. "Live access"/"direct connections" are not permitted when stored credentials are used.

In addition to the data security issues addressed by this Policy, standards for other aspects of shared use of Tableau, such as website organization and naming conventions, are established and updated by the Tableau Functional Team (TFT).

Individuals who are granted access to the tool are governed by existing university policies governing the privacy and protection of UNC Charlotte users and data.

## 2. Scope

This policy applies to all university faculty, staff, students, and affiliates who have access rights that allow them to publish data on UNC Charlotte's Tableau server.

## 3. Enforcement

Access to reports on the Tableau system will be audited on a regular basis to ensure that data are being used and shared appropriately.

### Review Frequency:

Annually for three years, thereafter every three years

### Updated:

12/12

### In Compliance with:

University Data Classification Standard

**Acceptance of Terms of Use:**

I accept that it is my responsibility as a Tableau developer to restrict access to each report I publish on the server only to those individuals permitted to see the data displayed in the report.

When giving access to a group, I understand that it is my responsibility to make sure that the group includes only individuals permitted to see the data displayed in the report.

I accept my responsibility as a Tableau developer to abide by all restrictions governing use of institutional data as set forth by the relevant data steward(s) of all data sources used in Tableau reports.

I agree to abide by all standards established for Tableau Enterprise use by the Tableau Functional Team.

I agree to have my email address added to the Tableau Enterprise Developer mailing list, and to monitor that list for updates to standards, guidelines, and best practices.

I understand that reports on Tableau enterprise server will be audited to confirm that data are being used appropriately. I acknowledge reading this policy and will abide by its stipulations when using Tableau.

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Signature

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Printed name

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Department/Office

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Date