



Tableau Quick Tips Guide

June 2017

Fannie Mae Connect™ uses Tableau software to enable data display and analysis. This document provides guidance on how to get the most out of Tableau reports. The reference guide is organized by functionality. A video tutorial is also available on the [Fannie Mae Connect page](#).

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Tableau Version Update

Fannie Mae Connect is updating Tableau from version 9.1 to 9.3. Each new version of Tableau increases performance and adds new features. This document has been updated to reflect some of the changes from an end-user point of view. As summarized on the table below, the most obvious change is the toolbar menu.

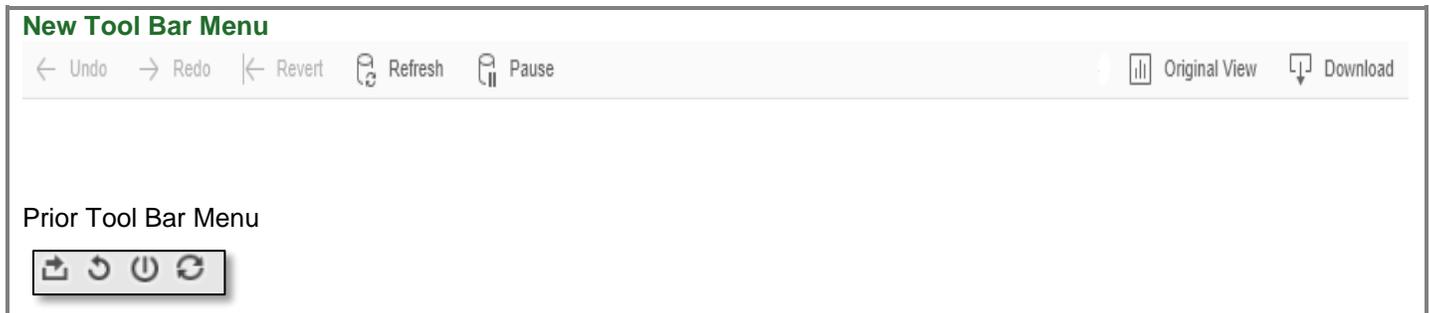


Tableau Menu Options

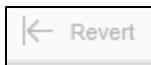
The eight buttons shown below will appear in Tableau reports. These buttons are used to Undo, Redo, Revert, Refresh data, Pause/Resume, and download the report or data.



Undo – This button allows to cancel the previous action.



Redo – This button allows to re-perform the previous action.



Revert – This option is intended to revert the report to its default view; undoing all user selections and/or filtering.

NOTE: This is a Tableau standard button that should not be used on Fannie Mae Connect reports. For security reasons, clicking this button will clear all data/tables/filters within a report. If selected, exit the report by selecting Report Center and then reentering report.



Refresh – In some scenarios, reports may store your filter selections in memory, and automatically open the report at that filter combination. To confirm that you are viewing the latest data available for the report, click Refresh.



Pause – This option allows the user to pause the update of data as the user is filtering. Tableau reports process filter selections as the user makes them, and some reports may take longer to process than others. If process time seems too long for a particular report, utilize the “Pause” button to prevent the report from processing each filter upon selection, resuming (see Resume button below) only when you are ready for Tableau to proceed with processing.



Resume – This option is only activated if you have “Paused”. Once you have paused automatic updates, click Resume to apply one or more filter choices you have made during the paused state.



Original View – This option allows to switch between default and custom view (e.g., a custom view with specific filters). This was called “remember my changes” in the previous version.



Download – This button provides the option to export the report as PDF or image and even export the data to Excel.

NOTE: See section on exporting data for additional details.

Launching Reports

It is important to understand that some reports default to pre-populated tables and/or graphs, while others default to a blank page with no visible data. Assuming there is applicable data in that report to display, a blank report may simply require you to make filter selections to initiate the processing of the data.

Navigating Report Tabs

Many reports contain multiple dashboards (tabs). To navigate through reports with various dashboards, select the dashboard you wish to view, located across the top of the subject report window.

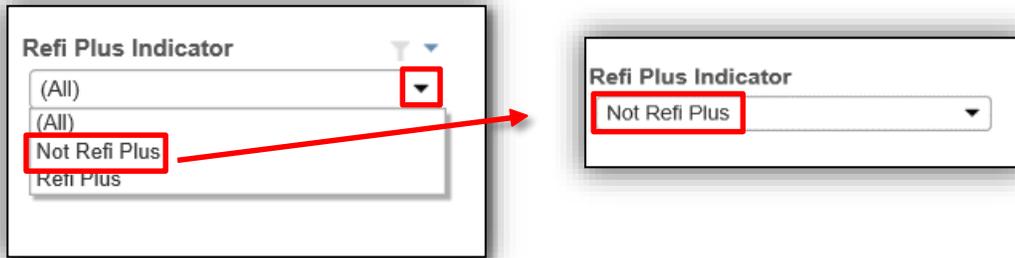




Single-Select Filtering

Single-select filters limit selection to one item at a time, though they may also include an “All” option. Always start by clicking the small arrow on the right-hand side of the filter selection box. The single-select filters do NOT have a check box next to the selections in the filter drop down. The selection will then appear in the collapsed selection box.

Important: Some reports require selection within the body of the report to activate the drop-down.

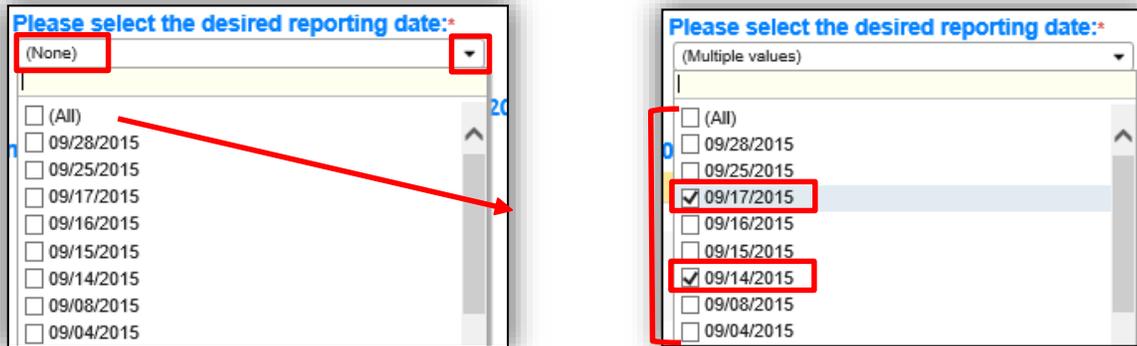


Multi-Select Filtering

Multi-select filtering provides the option to select multiple criteria to filter the data. The default report selection filter may be to include **(All)** options, or **none**, based on its design objectives.

Select the drop-down arrow to the right of the filter box – the “All” option will appear.

Example 1 – When a multi-select filter defaults to “None” and report is blank

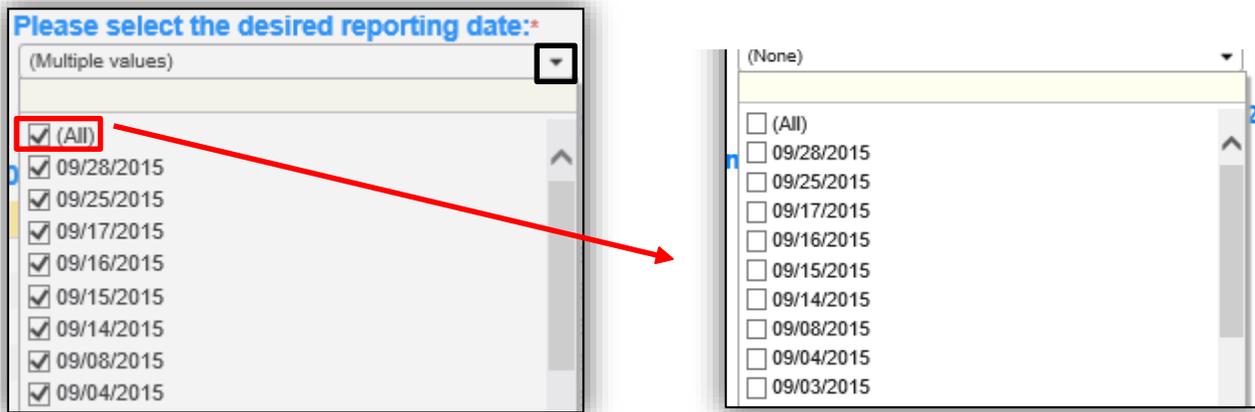


Select the checkbox to the left of each desired option – check marks appear when successfully selected; for example, 9/17/2015 and 9/14/2015. Data will then appear based on the filter choices.



Example 2 – When a multi-select filter defaults to “All” but you are interested in a specific population

If the “All” option is selected by default, unselect the checkbox for “All.” Proceed with selection of desired filter options.



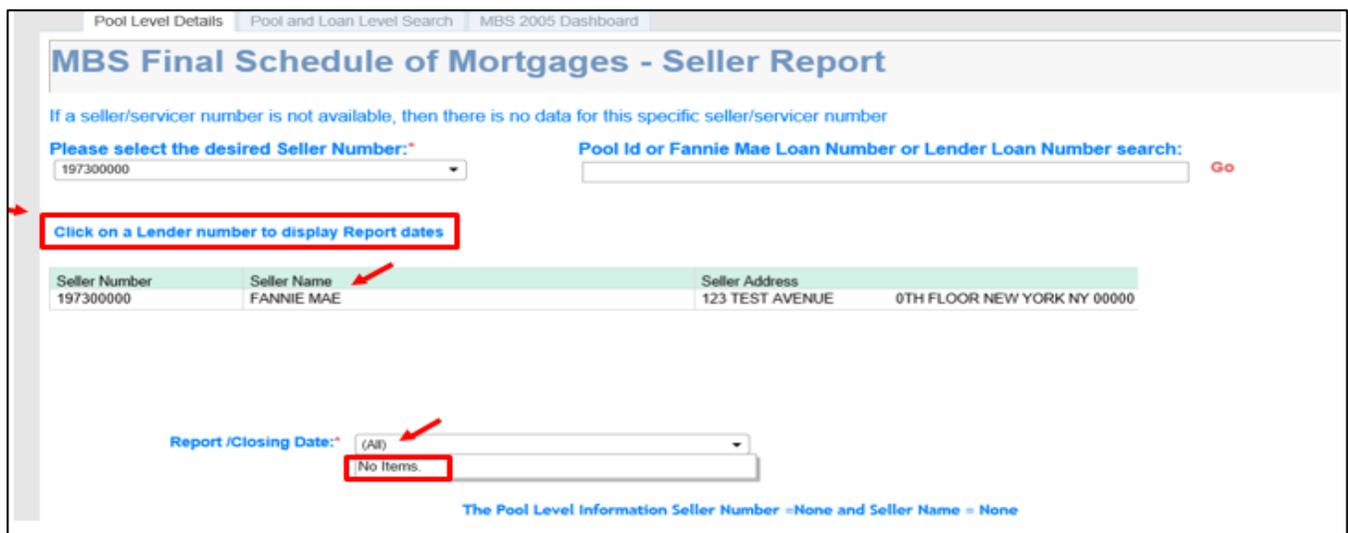
After selecting or unselecting filters (in the two examples above), Tableau will either update the report automatically or require you to select the **Apply** button at the bottom of the filter selection window.

*Hint – If the number of selection options is large, scroll to the bottom of the filter selection window to see the **Apply** button.*

NOTE: After making your filter selections, you may need to click somewhere within the body of the report to make the filter selection box disappear. Some Tableau filters apply to more than one table/graph in the report, and thus may require additional processing time.

Filter Options Lists “No Items”

If a filter shows “No Items” you may need to select a value from another filter or table first. See the example below. The report filter for “Report/Closing Date” has “No Items.” Look for instructional messages such as one that states “Click on a Lender number to display Report dates” below.





Once a seller number is selected (notice the cell is highlighted in blue below), gray boxes may appear as the report data is processing. Once complete, newly selectable options become yellow as they are activated. Options for the Report/Closing Date filter now appear. Once specific dates are selected, pool-level data appears.

Pool Level Details | Pool and Loan Level Search | MBS 2005 Dashboard

MBS Final Schedule of Mortgages - Seller Report

If a seller/servicer number is not available, then there is no data for this specific seller/servicer number

Please select the desired Seller Number:*

197300000

Pool Id or Fannie Mae Loan Number or Lender Loan Number search: Go

Click on a Lender number to display Report dates

Click to view MBS 2005 Report

Seller Number	Seller Name	Seller Address
197300000	FANNIE MAE	123 TEST AVENUE 0TH FLOOR NEW YORK NY 00000

Select the Report/Closing Date and then click on the Pool Number to display Loan Level Details

Report /Closing Date:* 09/23/2015

The Pool Level Information Seller Number = 197300000 and Seller Name = FANNIE MAE

Pool Number	Suffix Number	Pool Prefix	Settlement Date	Issue Date	Pass Thru Rate	Plan Number	Pool Subtype	Closing Date	Number of Loans	Pool Issue Balance
DE4567		BC	10/29/2014	10/1/2014	3.5000	0		09/23/2015	1.0	\$997.66



If a specific pool is selected (notice the blue Pool Number cell outlined in red, below), loan-level data appears. Drill-down throughout the Tableau reports can be accomplished similarly, wherever applicable.

Pool Level Details | Pool and Loan Level Search | MBS 2005 Dashboard

MBS Final Schedule of Mortgages - Seller Report

If a seller/servicer number is not available, then there is no data for this specific seller/servicer number

Please select the desired Seller Number: Pool Id or Fannie Mae Loan Number or Lender Loan Number search: [Go](#)

Click on a Lender number to display Report dates [Click to view MBS 2005 Report](#)

Seller Number	Seller Name	Seller Address	
197300000	FANNIE MAE	123 TEST AVENUE	0TH FLOOR NEW YORK,NY 00000

Select the Report/Closing Date and then click on the Pool Number to display Loan Level Details

Report/Closing Date:

The Pool Level Information Seller Number = 197300000 and Seller Name = FANNIE MAE

Pool Number	Suffix Number	Pool Prefix	Settlement Date	Issue Date	Pass Thru Rate	Plan Number	Pool Subtype	Closing Date	Number of Loans	Pool Issue Balance
DE4567		BC	10/29/2014	10/1/2014	3.5000	0		09/23/2015	1.0	\$997.66

Seller Number	Pool Number	Pool Suffix	FM Loan Number	Lender Loan No	Contract Number	Property Address	Actual UPB	LPI	G/Fee Per Cent
197300000	DE4567		1734398441	1144005936	903215		\$150,773.17	09/01/2014	45.00%

Exporting Data (Download)



Tableau handles Excel exports one table (or section) at a time. If you plan to export multiple tables, repeat the steps below for each table. Please note that Tableau will only export the table in which you have a selected cell. If the table exported is not the one you intended, try again and confirm that you are selecting a cell within the table you want to export.

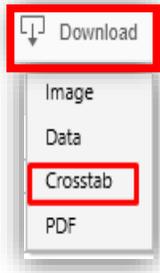
Click on any data point in the table you want to export. For example, the Pool Prefix is selected (notice the blue cell outlined in red, below). Then, click Download button.

The Pool Level Information Seller Number = 197300000 and Seller Name = FANNIE MAE

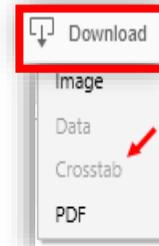
Pool Number	Suffix Number	Pool Prefix	Settlement Date	Issue Date	Pass Thru Rate	Plan Number	Pool Subtype	Closing Date	Number of Loans	Pool Issue Balance
DE4567		BC	10/29/2014	10/1/2014	3.5000	0		09/23/2015	1.0	\$997.66



1. Click the Download button and select Crosstab



Note: If Crosstab option is grayed out (as shown to the right), try selecting any data point in the report again and re-selecting Export; the Crosstab option should become available.



2. Give Tableau time to prepare the data for export. Click on Download when the pop-up below appears:



Click Open when the pop-up below appears:



3. Excel will open and the data selected for export will appear.

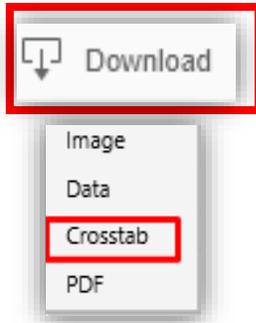
1	Seller Number	Seller Name	Seller Address	
2	197300000	FANNIE MAE	123 TEST AVENUE	0TH FLOOR NEW YORK NY 00000
3				



Export Report(s) to PDF

Tableau treats PDF exports as a snapshot of what appears on screen at the time of export. Tableau reports often use horizontal or vertical scroll bars to allow users to scroll through data as necessary. If the report being exported to PDF has a horizontal or vertical scroll bar on screen, the PDF will only capture the data that appears on screen at the time of export. To have access to all data in a table, it is recommended that data be exported to Excel instead.

1. Click the Download button and select PDF.



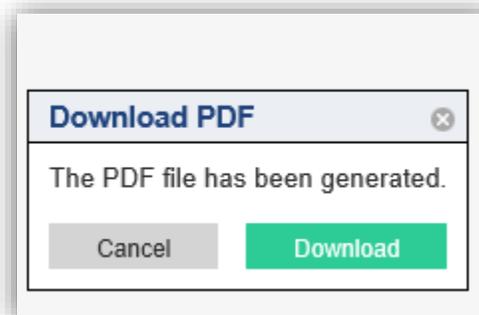
2. Select the Layout (Portrait vs. Landscape) and Content (current tab vs. all tabs) and then click Download.



NOTE: Selecting **“This Dashboard”** will export **ONLY** the current tab to PDF as it appears on the screen.

Selecting **“Sheets in Workbook”** will export all tabs in the report to PDF.

3. Click on Download when the pop-up appears:





4. Click Open when the pop-up below appears, to view the PDF file.



5. Acrobat will open and the exported report will appear.

Note: Because “**Sheets in Workbook**” was selected, all 3 tabs were exported to PDF as 3 separate pages.

Notice the Vertical Scroll bar appears as it does on screen.



Sorting Data

To sort data within a table, hover to the right of the column heading you wish to sort. A sorting icon will appear (bars and arrow). Click the sorting icon to switch from Ascending to Descending order.

NOTE:

Not all columns offer the sort option.

Issue Date	Pass Thru Rate	Plan Number	Pool Subtype	Closing Date
9/1/2015	3.0000	0		09/25/2015
9/1/2015	3.5000	0		09/25/2015
9/1/2015	2.5000	0		09/25/2015
9/1/2015	3.0000	0		09/25/2015
9/1/2015	4.0000	0		09/25/2015
9/1/2015	3.0000	0		09/08/2015

For more information on the Fannie Mae Connect application, please visit our webpage at <https://www.fanniemae.com/singlefamily/fannie-mae-connect>.