



Enterprise Data Management Council

DECISION: Canvas Data & Dashboard Provisioning

EDGC Decision Date: March 11, 2024

Decision

The request is for the EDGC to approve access to Canvas Data and Dashboards on Tableau. Heliocampus will provision Tableau access to Canvas Data and Dashboards according to a user's account level role in Canvas as noted in the account users table. Canvas supports FERPA compliance by providing the ability for each Universities of Wisconsin subaccount to define permission settings to specify what data each user can view in that subaccount. Each UW assigns roles in their Canvas subaccount to adhere to FERPA compliance; by aligning Canvas access permissions to Canvas Data and Dashboards in Tableau we ensure the access process remains FERPA compliant.

Background

The Universities of Wisconsin (UW) Digital Learning Environment (DLE) Canvas account is divided into three instances, each containing a variety of sub-accounts. The Canvas Data and Dashboards on Tableau focuses on the Instructional instance of Canvas and all of its sub-accounts. The Instructional Instance is used for all instructional credit courses and contains the sub-accounts which are integrated with campus Student Information Systems (SIS) to automatically pull course creation and enrollment data. The Instructional instance of Canvas typically has one "Instructional-Top Level" subaccount for each of the Universities of Wisconsin (excluding UW-Madison), and that university's subaccount is further subdivided into sub-accounts, each with its own permissions.

There are two types of roles in Canvas: course level roles and account level roles. Course level roles focus on the access a user needs for a course. Account level roles grant permission to perform tasks within the sub-account where they are applied, and within any sub-account or course below the sub-account where the role is applied. Every role which exists in Canvas is available across all Canvas subaccounts; universities can't request institution-specific roles which would only be available to users from their university.

For further information on Canvas Instances, Sub-Accounts, or Roles [visit the DLE KnowledgeBase \(KB\)](#).

Account Role Assignment

Access to Tableau Canvas Data and Dashboards will be based on a user's Account Level Role in Canvas. Account level roles in Canvas grant permissions to perform tasks within the campus sub-account where they are applied, and within any sub-account or course below the sub-account where the role is applied. Each university assigns account level roles in accordance with work needs.

Account Role Support

For user questions on account roles or to request an additional role(s) to access Canvas Data and Dashboards, users will need to consult their campus contact which can be located on this KB page: [LINK FORTHCOMING](#).

Data Access and Account Role Exceptions

Data access requests different from what a user may have as a canvas account role will be reviewed by the campus Canvas account role support for user's campus data only. Cross-campus data access requests will be reviewed by UWSA Canvas data steward. Canvas data steward will consult with the Canvas data trustee, DLE institutional liaisons and DLE Advisory Council as part of their review of the use case. Canvas data steward will bring requests that are challenging to resolve to the EDGC.

Who Developed the Recommendation?

This recommendation was developed by:

- Julie Pohlman, DLE Service Owner, Office of Learning & Information Technology Services

Who Was Consulted in the Development of the Recommendation?

The following stakeholders were consulted about the proposal:

- Dale Johnson, Office of Learning & Information Technology Services
- Jason Zapf, Office of Learning & Information Technology Services
- Stacy Scholtka, CTO, Office of Learning & Information Technology Services
- UWs Canvas Database Administrators
- DLE Advisory Council (DLE-AC)
- UWs Institutional Liaisons (DLE-ILs)

Appendix 1: Canvas Account Roles

Role Name	Role Description
Course Template Admin	People with this role can browse sub accounts and change subaccount and template settings within certain limits . When combined with another Account role such as Instructional Designer, this bolt-on role can extend the abilities of the more capable role.
Instructional Designer	This role is designed for campus or departmental designers who are involved in course development. Instructional designers have no access to student information, interactions, or grades.
Librarian - E-Reserves	This role can add or copy content to courses but cannot interact with students or coursework information.
Outcome Manager	This role can import and create rubrics and outcomes in schools/colleges, departments and at the course level. This role is likely to be used by program managers or department associates to add consistent outcomes into courses or sub-accounts in Canvas.
Reporting Admin	People with this role can observe activity in courses with the needs of course QA, professional development, course analysis and unit administration in-mind. This role is similar to the Support View role in that it can view course and user reports but has additional access to grade and discussion information.
Reports Only	People with this role only have access to reporting information. The Reports Only role is intended solely for accessing reporting information and nothing else. The role has very minimal access to courses.
Search Only Admin	People with this role are able to search for courses and people. They have read-only access to the Settings area and the People tool.
Support Admin	People with this role will have the ability to support institutional admins or lead support teams in managing Canvas courses and providing instructor support. The role is similar to an Instructional Designer in ability, but Support Admins can change additional course settings, publish announcements and manage observers.
Support View	People with this role have access to reporting information to aid in first line troubleshooting as well as auditing of information related to student progress and course content. Someone with this role might support students at a Help Desk or need to review a student's progress in a course for advising reasons.