



Fannie Mae®

Fannie Mae Connect Tableau Quick Tips Guide



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Introduction

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. This reference guide is organized by functionality.

Tableau Version Update

Fannie Mae Connect is using Tableau version 2025.1 as of June 2025. Each version of Tableau introduces new features as well as improvements to existing features. Fannie Mae upgrades their Tableau platform twice a year. This document has been revised to reflect the latest changes from an end-user point of view.

Tableau Menu Options

The eight buttons shown below will appear in Tableau reports. These buttons are used to Undo, Redo, Reset view, 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.



Reset view – This option is intended to reset 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, use 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 continue 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.



View: Original

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 offers the option to export the report as PDF or image and even export the data to Excel.

NOTE: See section on exporting data for more details.

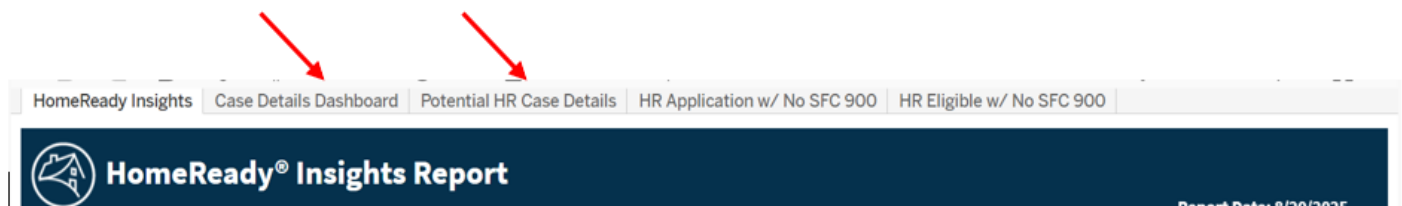


Launching Reports

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 start the processing of the data.

Navigating Report Tabs

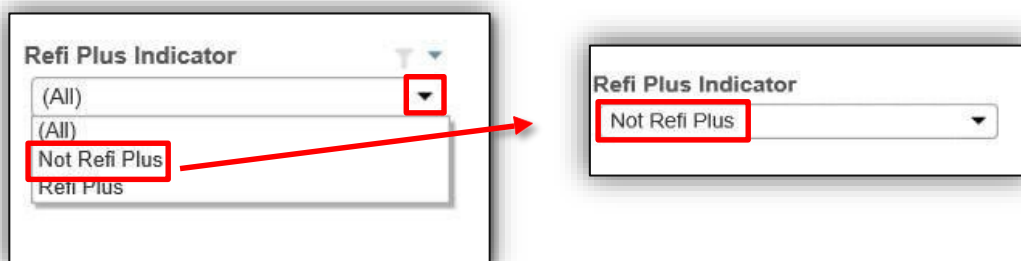
Many reports contain multiple dashboards (tabs). To navigate through reports with various dashboards, select the dashboard you wish to view, located across the top of the subject report window.



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.



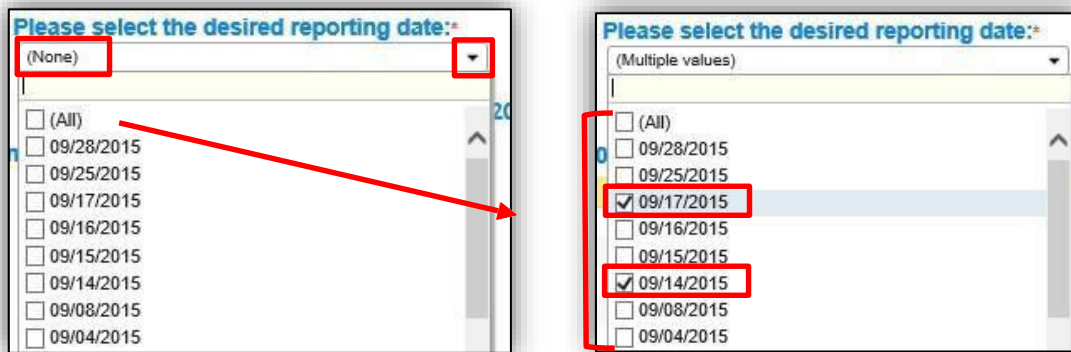


Multi-Select Filtering

Multi-select filtering offers 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.

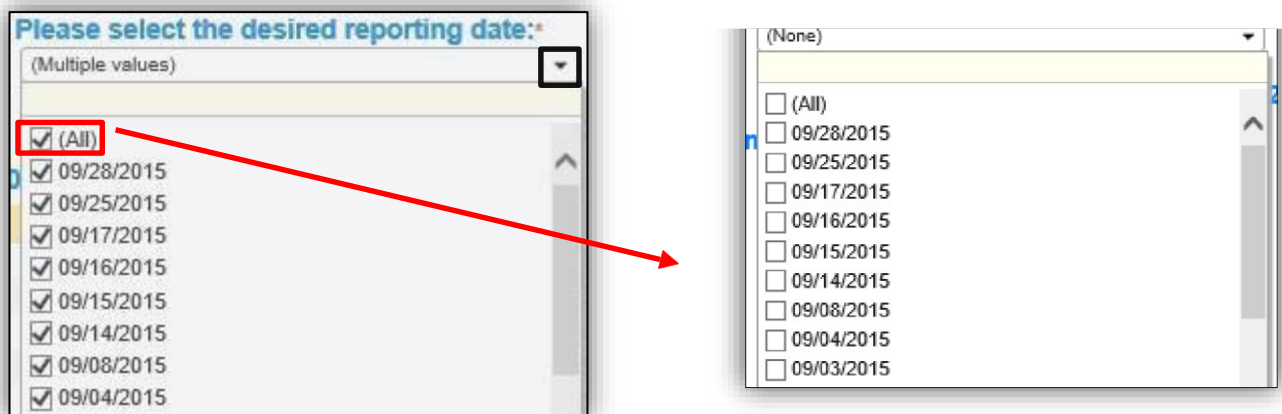
Example 1 – When a multi-select filter defaults to “None” and report is blank



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 added 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.”

The screenshot shows the Fannie Mae Risk Based Pricing interface. The 'Report Date (by Month)' dropdown menu is highlighted with a red box and shows 'No Items' with a link to 'Most Recent Issue Month - July 2025'. Other filters include 'Seller Number' (None), 'Fannie Mae Loan Number' (None), 'Lender Loan Number' (None), 'Search by Actual LLPA Amount' (None), and 'LLPA Component' (None). On the right, there are two empty boxes for 'Total Loans Selected' and 'Total Actual LLPA Amount'.

Once a seller number is selected (notice the cell is highlighted in blue below), options for the Report/Closing Date filter will now appear. Once specific dates are selected, related data will appear.

The screenshot shows the Fannie Mae Risk Based Pricing interface with a red arrow pointing to the 'Seller Number' dropdown, which now contains the value '100650002'. The 'Report Date (by Month)' dropdown menu is highlighted with a red box and shows a list of options: '(All)' and 'Most Recent Issue Month' (which is selected with a checkmark). Other filters include 'Fannie Mae Loan Number' (All), 'Lender Loan Number' (All), 'Search by Actual LLPA Amount' (All), and 'LLPA Component' (All). Below the 'Seller Number' dropdown, it says 'Sellers Selected: 1'.



Exporting Data (Download) to Excel or CSV Formatted file

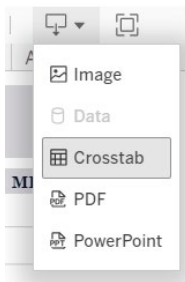
Tableau handles Excel exports one table (or section) at a time. If you plan to export multiple tables, repeat the steps below for each table. Please note that Tableau will only export the table in which you have a selected cell. If the table exported is not the one you intended, try again, and confirm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

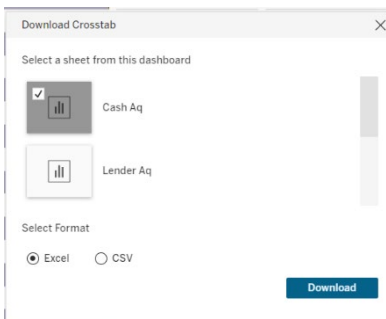
Pool Number	Suffix Number	Pool Prefix	Settlement Date	Issue Date	Pass Thru Rate	Plan Number	Pool Subtype	Closing Date	Number of Loans	Pool Issue Balance
DE4567		BC	10/29/2014	10/1/2014	3.5000	0		09/23/2015	1.0	\$997.66

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. A dialog box appears before downloading the crosstab file. By default, the selected sheet for export is checked, with excel format for download. Click on Download when the pop-up appears.

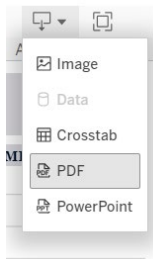




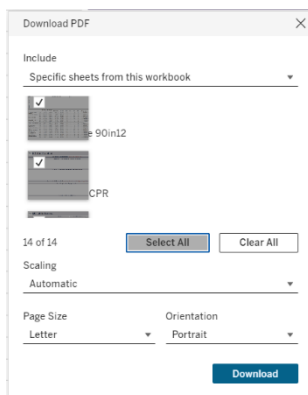
Export Report(s)/ Multiple Tabs to PDF

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.

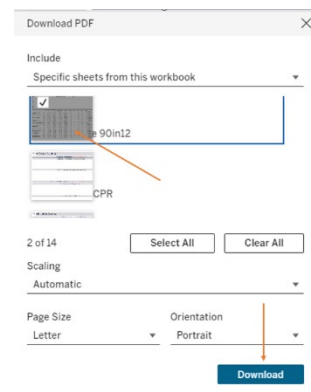


2. Select “Specific sheets from this workbook. Click on “Select All” if you want the entire report.



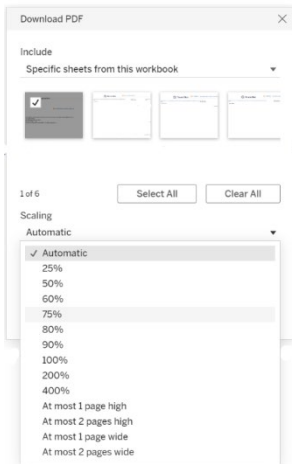
3. Or select each sheet of interest individually by checking the box in the upper left corner of the sheet.

4. Click on Download.



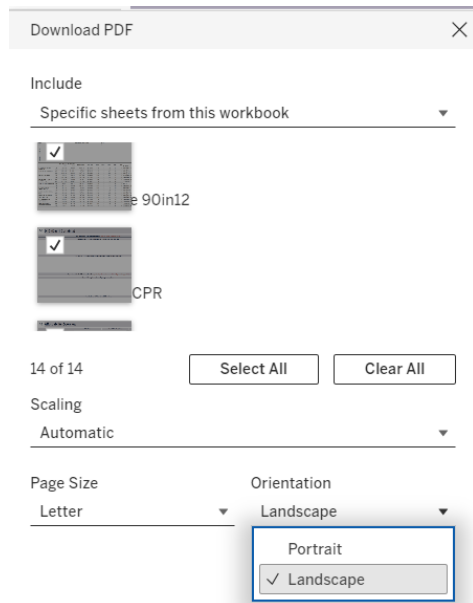


5. Please note, for reports with larger tables or charts, it may be necessary to adjust the document settings for scaling or orientation prior to downloading so that the content fits on the page. The change the scaling, change the scaling from “Automatic” to one of the other scale sizes offered in



the drop down.

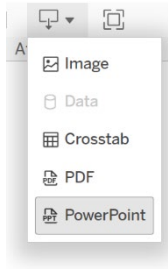
To adjust the orientation of the document, change the setting from “Portrait” to “Landscape.”



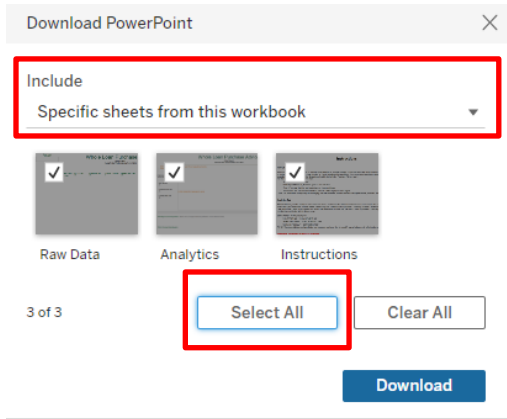


Export Report(s)/Multiple Tabs to PowerPoint

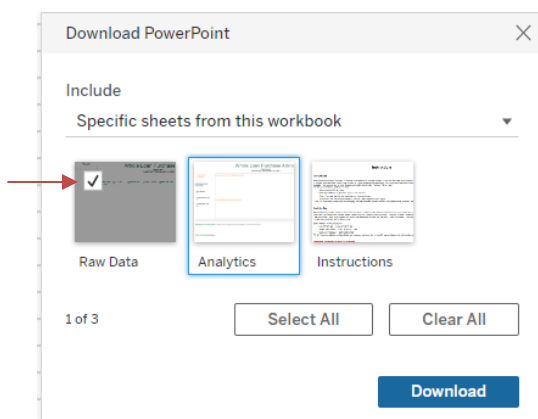
1. Click the Download button and select PowerPoint.



2. Select the sheets of interest or select all to download the entire report or select individual sheets to download.



To select individual slides, check the box in the upper left corner of the slide.






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