



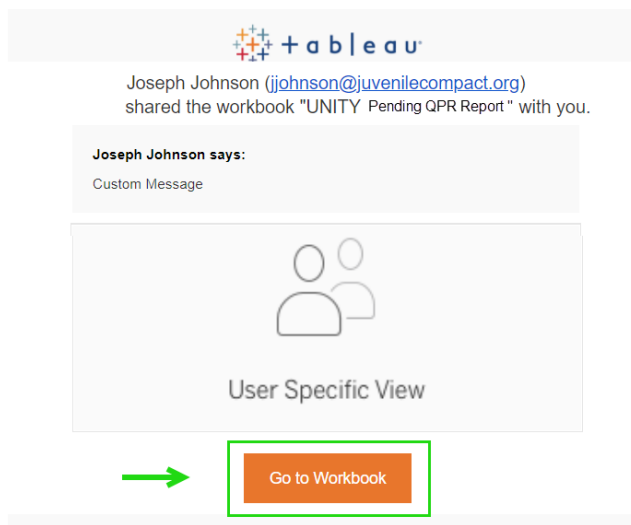
# TABLEAU PENDING QPR REPORT

## QUICK REFERENCE GUIDE

### Step 1: Open Email Invitation

Open the email invitation from [no-reply@tableau.com](mailto:no-reply@tableau.com).

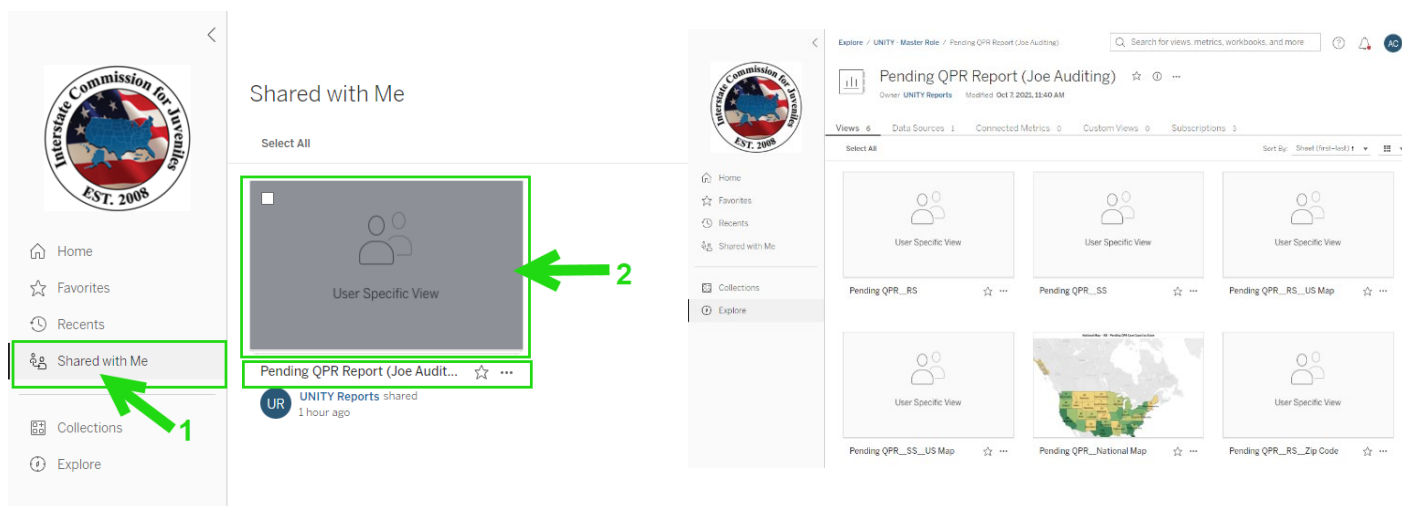
Click on “Go to Workbook.” This will log you into your Tableau “Favorites” page.

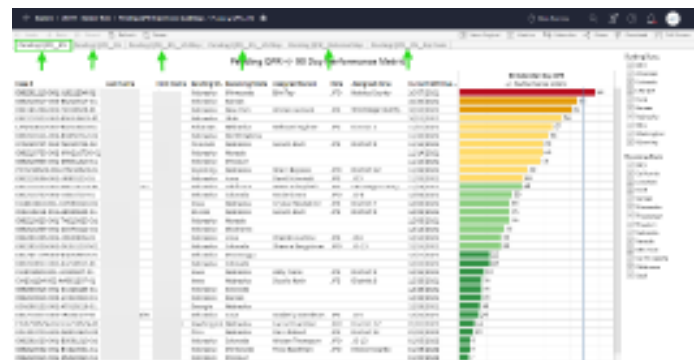


### Step 2: Click “Shared with Me” in Tableau

Click the shared workbook FOLDER icon associated with the **Pending QPR Report**. This will open all 6 worksheets in the workbook:

- 1) Pending QPR\_RS, 2) Pending QPR\_SS, 3) Pending QPR\_RS\_US Map, 4) Pending QPR\_SS\_US Map, 5) Pending QPR\_National Map, 6) Pending QPR\_RS\_Zip Code







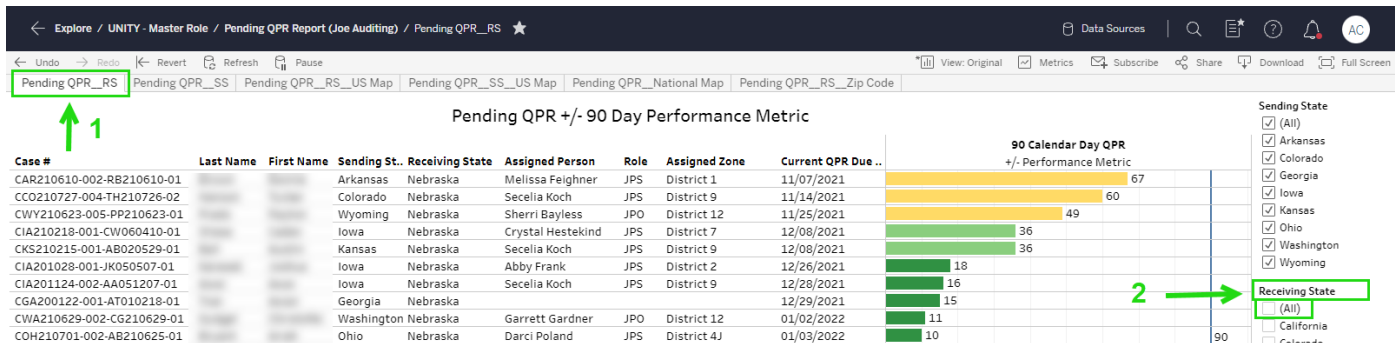
# TABLEAU PENDING QPR REPORT

## QUICK REFERENCE GUIDE

### Step 5: Configure 5 of the 6 reports and save your settings

#### Pending QPR +/- 90 Day Performance Metric:

1. Click on the "Pending QPR\_RS" worksheet – Tab 1.
2. In the "Receiving State" column, deselect "All" and select your state only.



Receiving State

- ☒ (All)
- ☒ California
- ☒ Colorado
- ☒ Iowa
- ☒ Kansas
- ☒ Minnesota
- ☒ Mississippi
- ☒ Missouri
- ☒ Nebraska
- ☒ Nevada
- ☒ New York
- ☒ North Dakota
- ☒ Oklahoma
- ☒ Utah

Receiving State

- ☐ (All)
- ☐ California
- ☐ Colorado
- ☐ Iowa
- ☐ Kansas
- ☐ Minnesota
- ☐ Mississippi
- ☐ Missouri
- ☐ Nebraska
- ☐ Nevada
- ☐ New York
- ☐ North Dakota
- ☐ Oklahoma
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- ☐ (All)
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- ☐ Missouri
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- ☐ New York
- ☐ North Dakota
- ☐ Oklahoma
- ☐ Utah

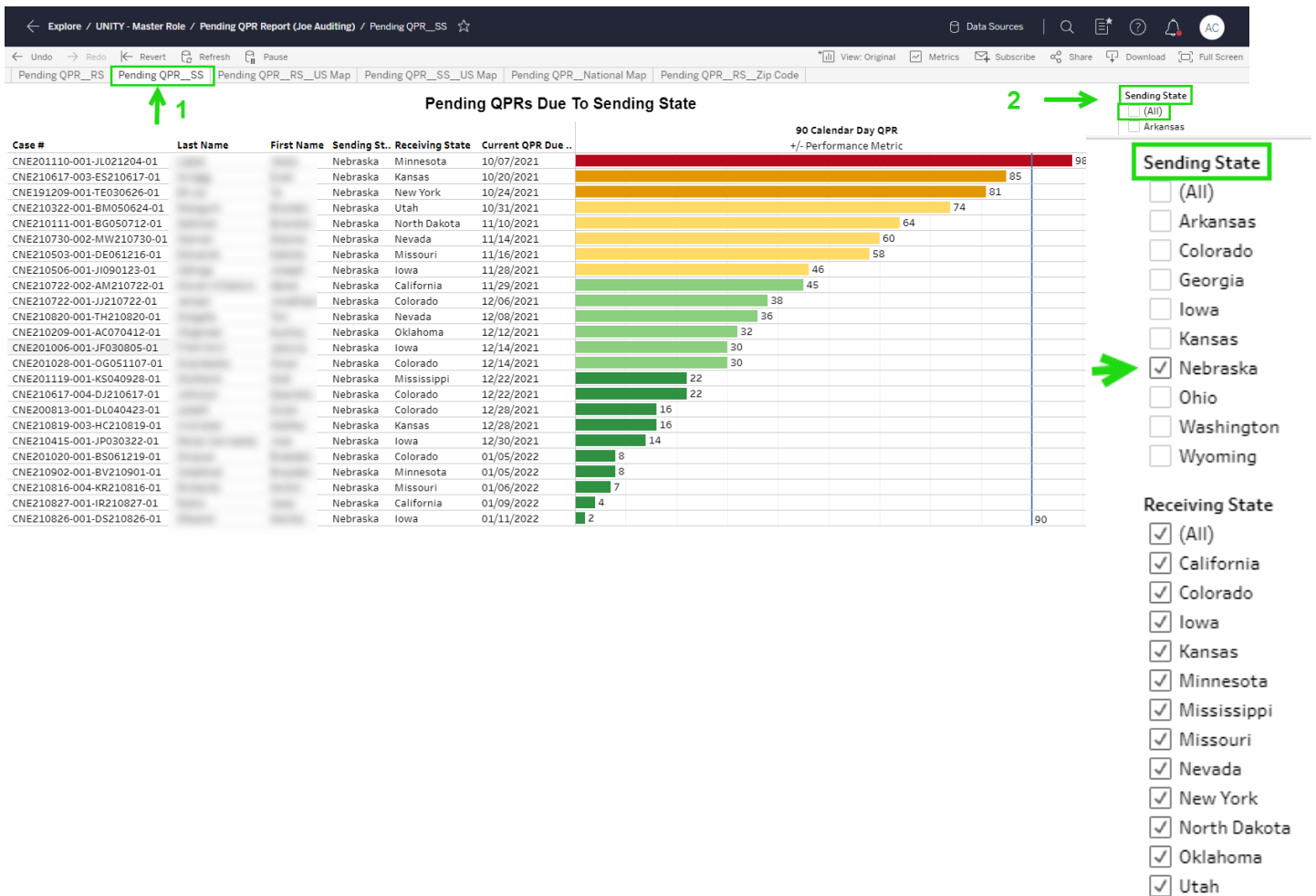


# TABLEAU PENDING QPR REPORT

## QUICK REFERENCE GUIDE

### Pending QPRs due to Sending State:

1. Click on the "Pending QPR\_SS" worksheet – Tab 2.
2. In the "Sending State" column, deselect "All" and select your state only.



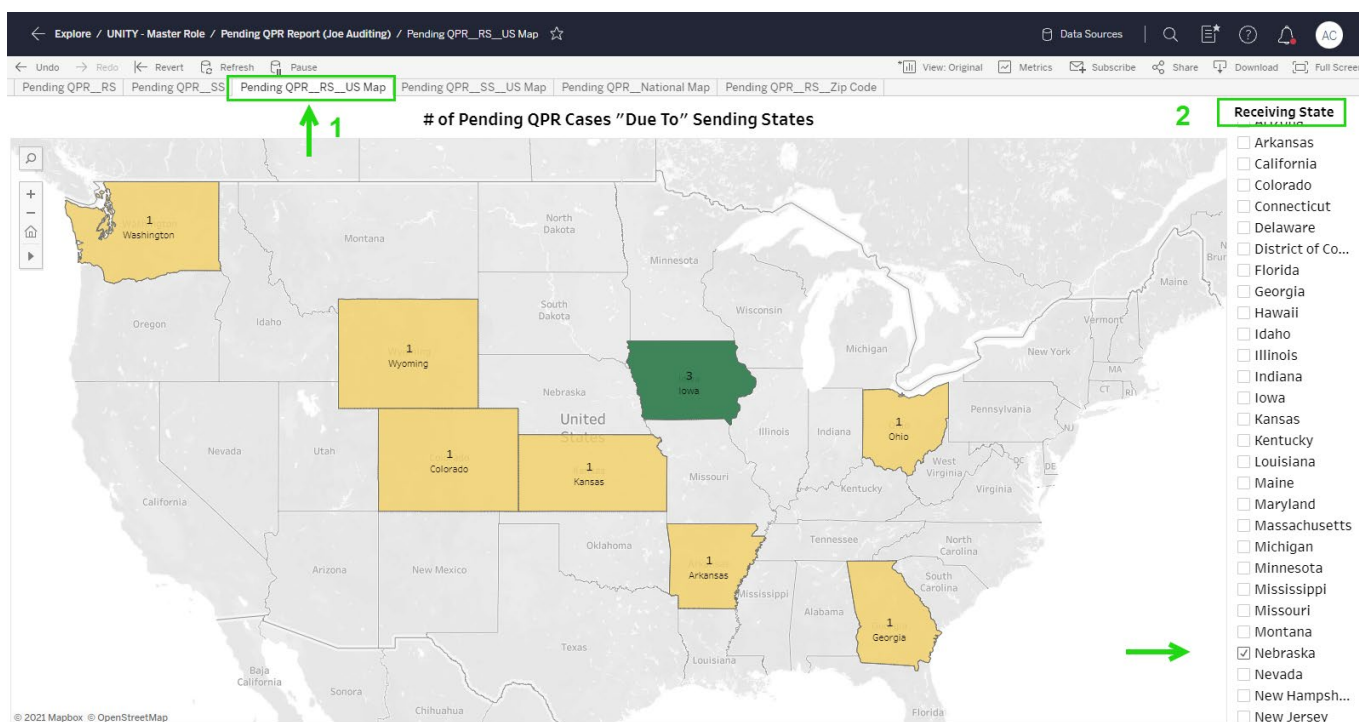


# TABLEAU PENDING QPR REPORT

## QUICK REFERENCE GUIDE

### # of Pending QPR Cases “Due To” Sending States:

1. Click on the “Pending QPR\_RS\_US Map” worksheet – Tab 3.
2. In the “Receiving State” column, deselect “All” and select your state only.





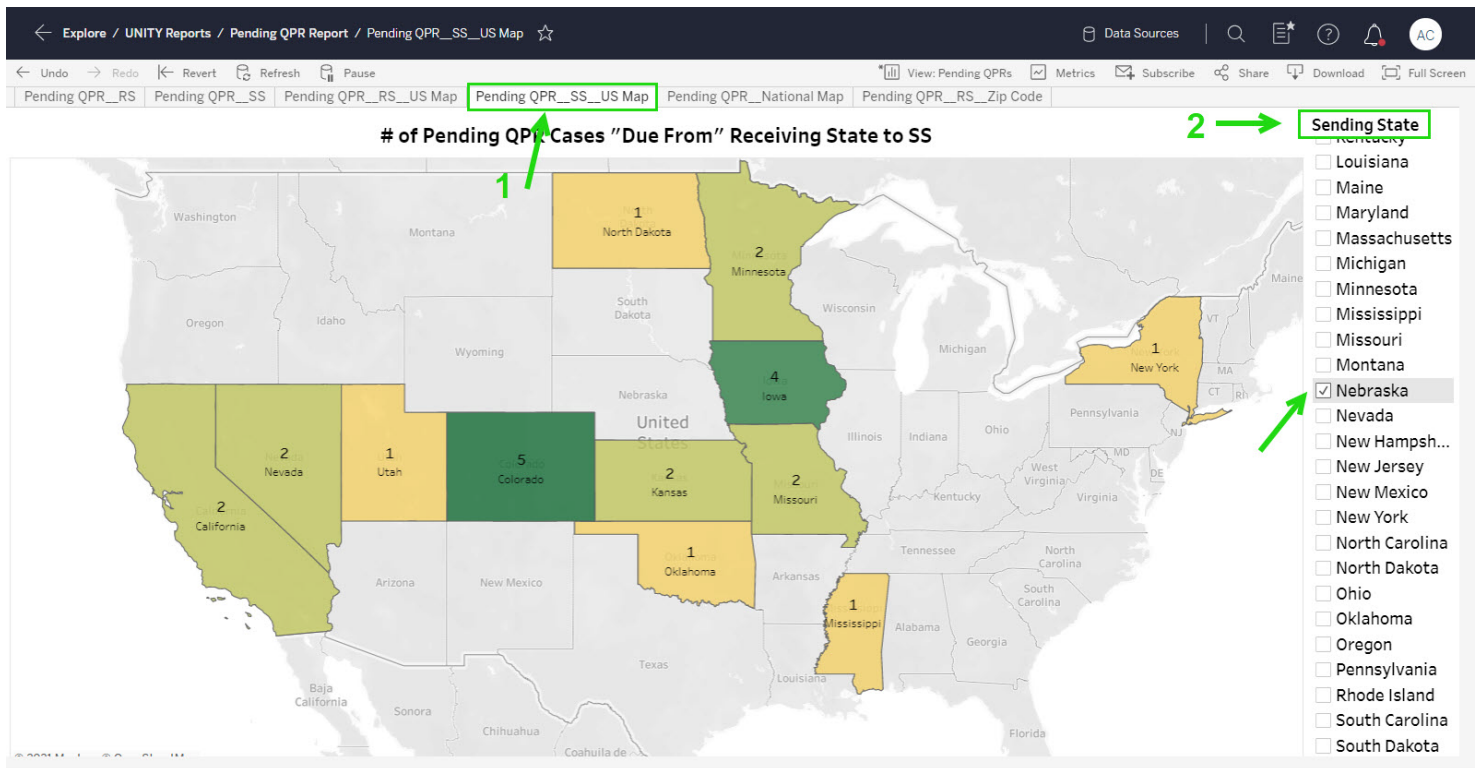


# TABLEAU PENDING QPR REPORT

## QUICK REFERENCE GUIDE

### # of Pending QPR Cases "Due From" Receiving State to SS:

1. Click on the "Pending QPR\_SS\_US Map" worksheet – Tab 4.
2. In the "Sending State" column, deselect "All" and select your state only.



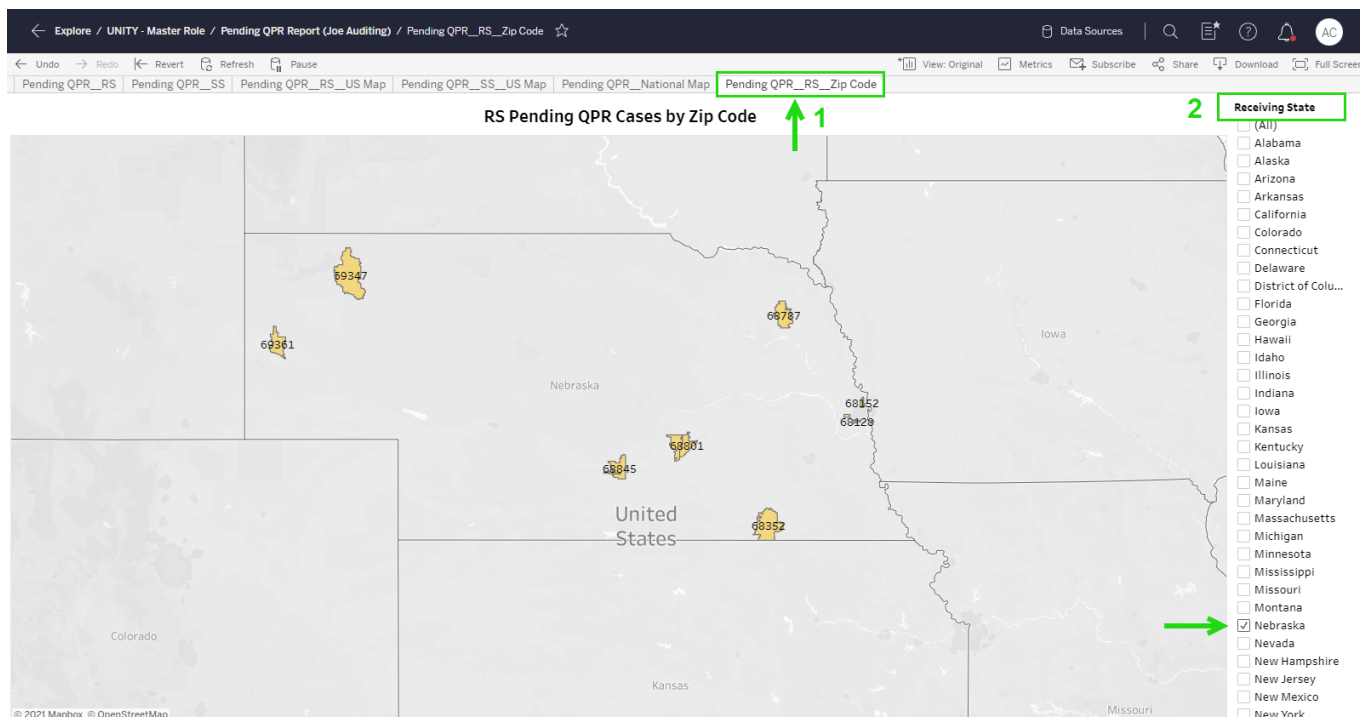


# TABLEAU PENDING QPR REPORT

## QUICK REFERENCE GUIDE

### RS Pending QPR Cases by Zip Code:

1. Click on the “Pending QPR\_RS\_Zip Code” worksheet – Tab 6.
2. In the “Receiving State” column, deselect “All” and select your state only.





# TABLEAU PENDING QPR REPORT

## QUICK REFERENCE GUIDE

### Step 6: Save your report configuration settings

1. Click back to the first report tab: **Pending QPR\_RS**.
2. Select “View Original” in the navigation menu. This will open the “Save Custom View” window.
3. Name the view “Pending QPR Report.”
4. Check the checkbox to “Make it my default.”
5. Click the SAVE button.

The screenshot shows the Tableau interface with the 'Pending QPR\_RS' view selected. The 'View Original' button is highlighted in the top right corner. A green box labeled 'View Original' is also present.

The screenshot shows the 'Save Custom View' dialog box. The 'Name this view' field is highlighted with a green box labeled '3' and contains the text 'Pending QPR Report'. The 'Make it my default' checkbox is highlighted with a green box labeled '4' and is checked. The 'Save' button is highlighted with a green box labeled '5'.



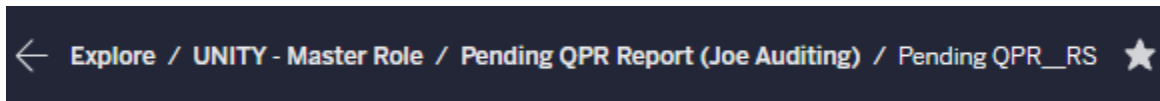


# TABLEAU PENDING QPR REPORT

## QUICK REFERENCE GUIDE

### Tableau Navigation & Functions

**Navigation Breadcrumbs:** Click on links to exit to the main Tableau navigation



**Full Screen:** Click “Full Screen” to view the report in full screen view.



**Download:** Click “Download” to select 1 of 5 download options to your download folder.



The 'Subscribe' dialog box contains the following settings:

- Include:** This View
- ☐ Don't send if view is empty
- Format:** PDF
- Paper Size:** Letter
- Orientation:** Landscape
- Subject:** Pending QPR\_RS
- Message (Optional):** Add a custom message
- Schedule:** 1 day a week, at 03:00
- Repeats:** Weekly
- At:** 03:00
- On:** Su, M, T, W, Th, F, Sa
- Time zone:** (UTC-07:00) Canada/Mountain
- Buttons:** Manage Subscriptions, Cancel, Subscribe

The 'Download' dialog box shows the following options:

- Select your file format.
- Image
- Data
- Crosstab
- PDF
- PowerPoint
- Tableau Workbook

**Subscribe:** Click “Subscribe” to have the report auto-emailed to your inbox on a defined schedule. Review all windows settings when configuring. Recommendation: Set the “At” time for 3:00 AM or early morning)