

## Step 1: Open Email Invitation

Open the email invitation from <u>no-</u> <u>reply@tableau.com.</u>

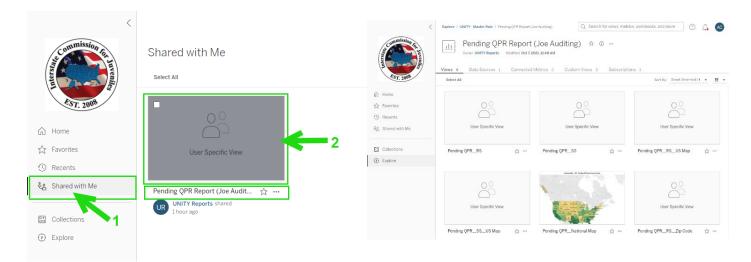
Click on "Go to Workbook." This will log you into your Tableau "Favorites" page.

🙀 + a b   e a u
Joseph Johnson (jjohnson@juvenilecompact.org) shared the workbook "UNITY Pending QPR Report " with you.
Joseph Johnson says:
Custom Message
User Specific View
Go to Workbook

## 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:

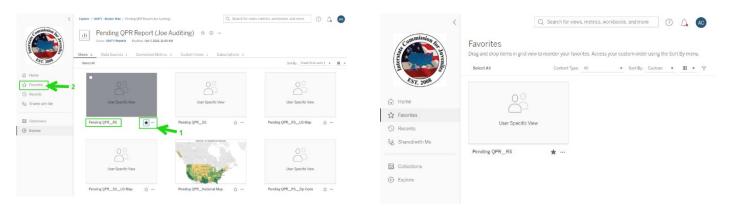
1) Pending QPR\_RS, 2) Pending QPR\_SS, 3) Pending QPR\_RS\_US Map, 4) Pending QPR\_SS\_US Map, 5) Pending QPR\_National Map, 6) Pending QPR\_RS\_Zip Code





## Step 3: Click the STAR on the Pending QPR\_RS Worksheet

This will add this workbook/worksheet report to your favorites. Next, click "Favorites" in the navigation. This will open your Favorites and present the Pending QPR\_RS report.



# Step 4: Click the shared workbook FOLDER icon associated with the Pending QPR\_RS report

This will open your 6 worksheets with the Pending QPR\_RS as sheet (tab) 1.

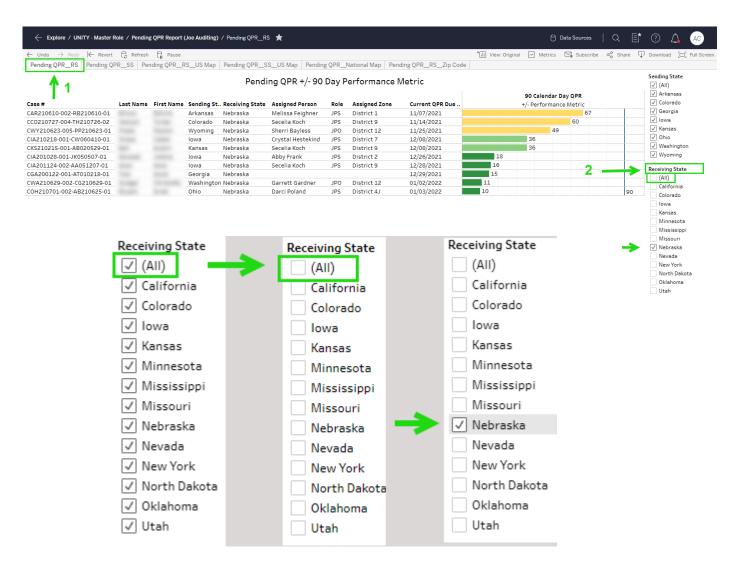
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## Step 5: Configure 5 of the 6 reports and save your settings

### 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.





# TABLEAU PENDINGQPR REPORTQUICK 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.

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VE210503-001-DE061216-01			Nebraska	Missouri	11/16/2021					58					Colorado
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# # 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.

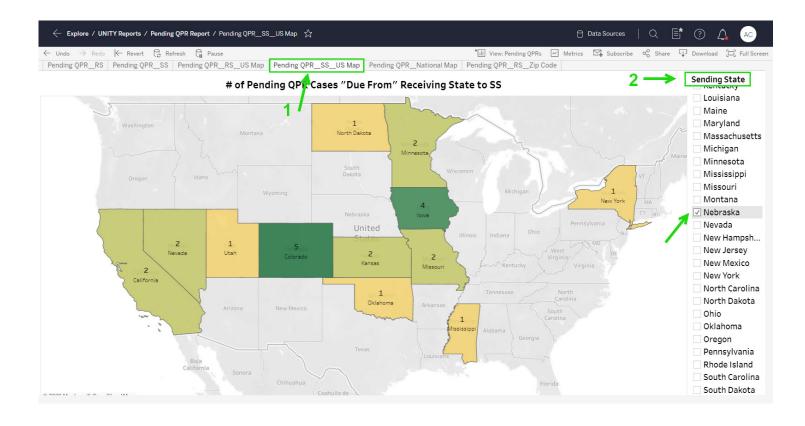




## QUICK REFERENCE GUIDE

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

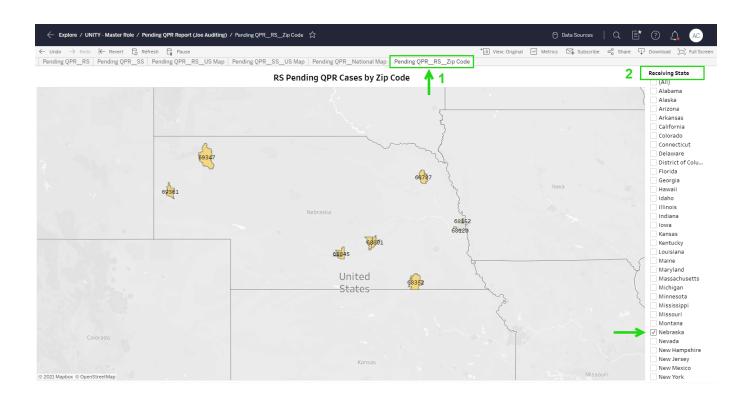
- 1. Click on the "Pending QPR\_SS\_US Map" worksheet Tab 4.
- 2. In the "Sending State" column, deselect "All" and select your state only.





### 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.

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# TABLEAU PENDING OPR REPORT

## **Tableau Navigation & Functions**

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

