

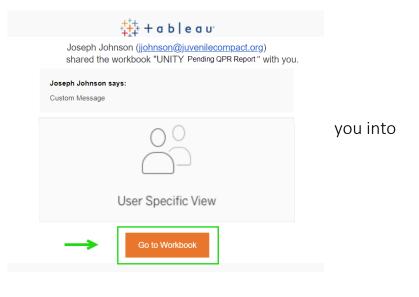
TABLEAU PENDING HE REPORT

QUICK REFERENCE GUIDE

Step 1: Open Email Invitation

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

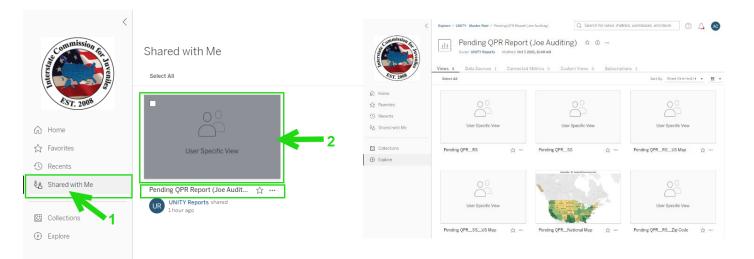
Click on "Go to Workbook." This will log your Tableau "Favorites" page.



Step 2: Click "Shared with Me" in Tableau

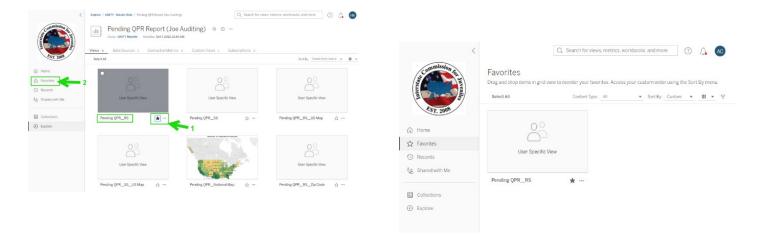
Click the shared workbook FOLDER icon associated with the **Pending HE Report.** This will open all 6 worksheets in the workbook:

1) Pending HE_RS, 2) Pending HE_SS, 3) Pending HE_RS_US Map, 4) Pending HE_SS_US Map, 5) Pending HE_National Map, 6) Pending HE_RS_Zip Code



Step 3: Click the STAR on the Pending HE_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 HE_RS report.



Step 4: Click the shared workbook FOLDER icon associated with the Pending HE_RS report

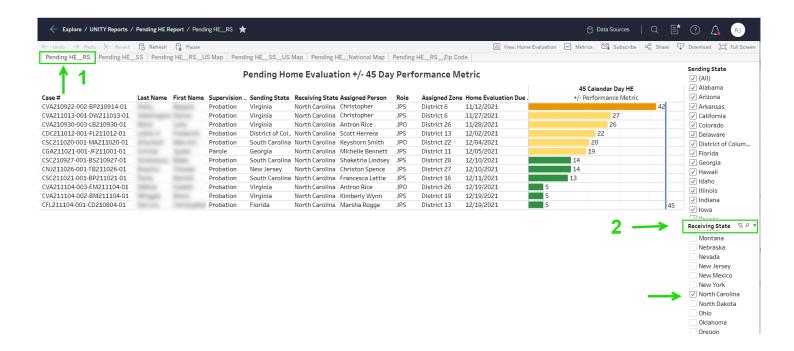
This will open your 6 worksheets with the Pending HE_RS as sheet (tab) 1.



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

Pending HE +/- 45 Day Performance Metric:

- 1. Click on the "Pending HE_RS" worksheet Tab 1.
- 2. In the "Receiving State" column, deselect "All" and select your state only.



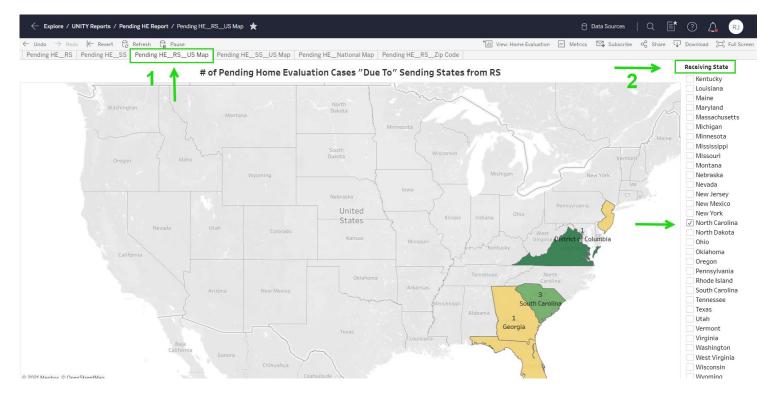
Pending HEs Due To Sending State:

- 1. Click on the "Pending HE_SS" worksheet Tab 2.
- 2. In the "Sending State" column, deselect "All" and select your state only.

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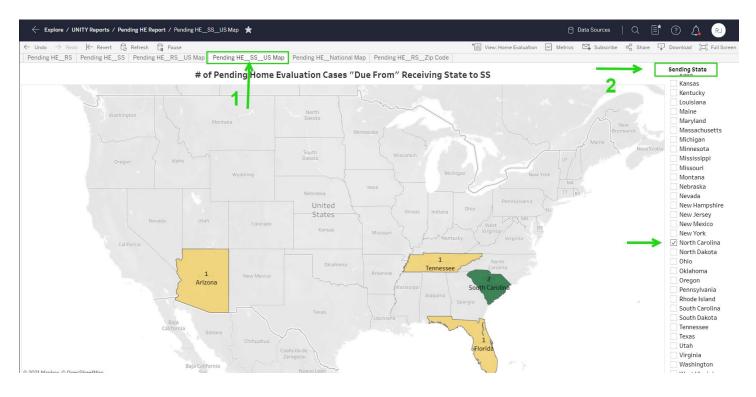
of Pending HE Cases "Due To" Sending States:

- 1. Click on the "Pending HE_RS_US Map" worksheet Tab 3.
- 2. In the "Receiving State" column, deselect "All" and select your state only.



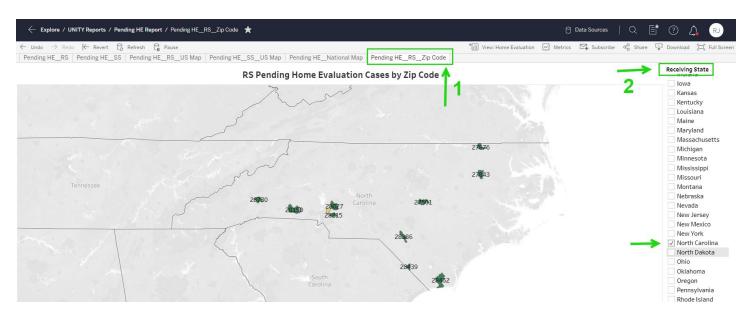
of Pending HE Cases "Due From" Receiving State to SS:

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



RS Pending HE Cases by Zip Code:

- 1. Click on the "Pending HE_RS_Zip Code" worksheet Tab 6.
- 2. In the "Receiving State" column, deselect "All" and select your state only.



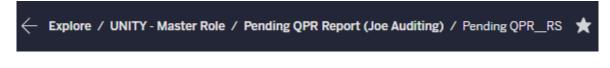
Step 6: Save your report configuration settings

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

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Tableau Navigation & Functions

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



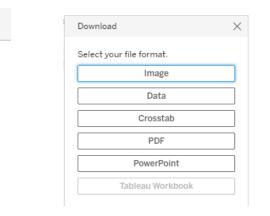
Full Screen: Click "Full Screen" to view the report in full screen view.



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