

User Manual: Tableau – Importing CSV and Creating a Dashboard

Step 1: Download and Install Tableau

1. Go to the **Tableau** official website: <https://www.tableau.com>
 2. Click on **"Try Now"** (if using Tableau Public) or **"Download Tableau Desktop"** (if you have a license).
 3. Fill in the required details and click **"Download Free Trial"** (for Tableau Desktop) or **"Download Tableau Public"** (for the free version).
 4. After downloading, open the installer file and follow the on-screen instructions:
 - Accept the terms and conditions.
 - Click **"Install."**
 - Once installed, launch Tableau.
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Step 2: Load CSV File into Tableau

1. Open Tableau.
 2. On the home screen, under **"Connect"**, select **"Text File"** (for CSV files).
 3. Navigate to the folder containing your CSV file and select it.
 4. Tableau will display a preview of the data.
 5. Click **"Sheet 1"** at the bottom to start creating visualizations.
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Step 3: Create Sheets (Visualizations)

1. Create a Patient Age Histogram

1. Go to **Sheet 1**.
 2. Drag the **Age** column from the **Data Pane** to **Columns**.
 3. Drag the **Number of Records** to **Rows**.
 4. Select **Histogram** from the **Show Me** panel.
 5. Adjust the bin size if needed by right-clicking the Age axis → **Edit Bins** → Set size.
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2. Create Number of Encounters Visualization

1. Create a new sheet.
2. Drag **Encounter ID** to **Rows**.
3. Change the aggregation to **Count** (right-click → Convert to Measure → Count).
4. Format as a bar or line chart from the **Show Me** panel.

3. Create Number of Patients Visualization

1. Create a new sheet.
 2. Drag **Patient ID** to **Rows**.
 3. Change the aggregation to **Count**.
 4. Format as a bar chart from the **Show Me** panel.
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4. Create Inpatient Average Length of Stay (Avg_LOS)

1. Create a new sheet.
 2. Drag **Length of Stay** to **Rows**.
 3. Change the aggregation to **Average** (right-click → Measure → Average).
 4. Format as a bar or line chart from the **Show Me** panel.
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5. Create ER Median Time

1. Create a new sheet.
 2. Drag **ER Time** to **Rows**.
 3. Change the aggregation to **Median** (right-click → Measure → Median).
 4. Format as a bar chart from the **Show Me** panel.
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6. Create Encounters Over Time

1. Create a new sheet.
 2. Drag **Date** to **Columns** (convert to continuous if needed).
 3. Drag **Encounters** to **Rows**.
 4. Format as a line chart from the **Show Me** panel.
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7. Create All Payer Mix

1. Create a new sheet.
 2. Drag **Payer Type** (e.g., Medicare, Private, No Insurance) to **Rows**.
 3. Drag **Number of Records** to **Columns**.
 4. Format as a stacked bar or pie chart from the **Show Me** panel.
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Step 4: Build the Dashboard

1. Click on "**New Dashboard**" (bottom of the screen).
 2. Drag and drop the created sheets onto the dashboard.
 3. Resize and arrange the sheets as needed.
 4. Add interactive filters:
 - Drag a filter from the **Data Pane** to the dashboard.
 - Adjust settings to apply the filter across all sheets.
 5. Customize the dashboard title and formatting using the **Format** panel.
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Step 5: Save and Export

1. Save the file:
 - For Tableau Desktop: **File** → **Save As**
 - For Tableau Public: **File** → **Save to Tableau Public**
2. Export as a PDF or image:
 - **File** → **Export** → **PDF/Image**