



# Instructions to Generate or Update the Greener Homes Tableau Dashboard

The following steps will take you from the raw Greener Homes Salesforce data, through to the complete dashboard.

## 1 Grabbing the Necessary Salesforce Data

Download the necessary data from Salesforce, which are from the following two reports.

### 1.1 GH Complete Retrofit for Tableau

- **Refresh**
- **Export** as csv file (Detailed view only)
- **Save** the file to the folder

**./GH Dashboard/Data Prep/GH Retrofit Dataset/**

and **rename** to match the following format

**GH All Retrofits YYYY-MM-DD.csv**

- **Move** previous file in the folder to the **./Archived/** folder (see **Figure 2**).

### 1.2 GH Application History for Tableau

- **Refresh**
- **Update filter** ("Edit Date" only)
  - ↪ **Set the new Start Date to the old End Date**
  - ↪ **Set the new End Date to the yesterday**
  - ↪ **Apply the changes**

- **Export** as csv file (Detailed view only)
- **Save** the file to the folder

**./GH Dashboard/Data Prep/GH Alt Dataset/**

and **rename** to match the following format

**GH History Dates YYYY-MM-DD YYYY-MM-DD.csv**

where the dates are the 'Start Date' and 'End Date' from the filter, respectively.

## 2 Python and File Movement

All of the python code and other file steps have been condensed into one, easy-to-use windows executable file. You only need to:

- **Double click** on the file named **gh\_data\_prep.bat**
- Follow the **on screen instructions**

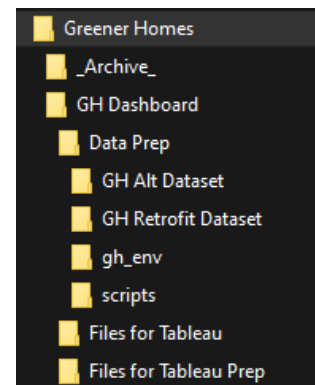


Figure 1: File structure for the data cleaning process.

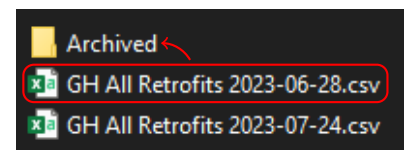


Figure 2: GH completed retrofit file structure.

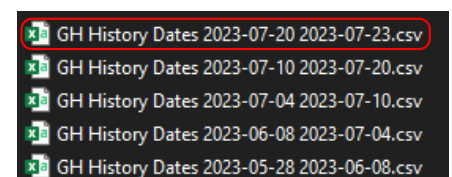


Figure 3: GH in progress retrofit file structure.

### 3 Tableau Prep

- **Open** the folder titled **Files for Tableau Prep**
- **Open** the **GH\_prep.tfl** file
- Check the **correct file location** of each block on the **far left** and **far right**
  - ↪ Click each of these blocks to bring up the edit box
  - ↪ Locate file save location
  - ↪ For blocks on the **left**, confirm each path contains the folder **Files for Tableau Prep** (see **Figure 4**)
  - ↪ For blocks on the **right**, confirm each path contains the folder **Files for Tableau** (see **Figure 4**)

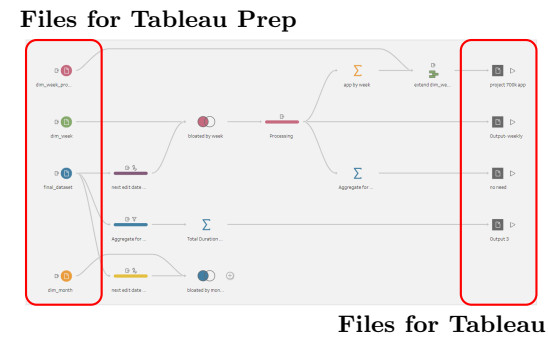


Figure 4: Tableau Prep layout.

### 4 Tableau Desktop

- **Open** the folder titled **Files for Tableau**
- **Open** the **GH\_dashboard.twb** file
- **Confirm** the date at the top of each dashboard is correct
  - ↪ **GHP History** and **Placemat Data** should show the **edit date** chosen when pulling data from Salesforce (yesterday's date, usually)
  - ↪ **GHP Grant** should show today's date

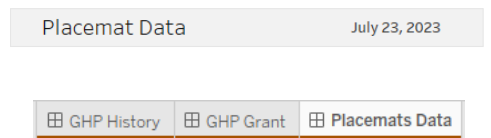


Figure 5: Confirm date in each of the dashboards.

#### If errors occur ..... check the data source(s)

If there are any issues with the data during this step, please ensure that each data source is pointing to the correct file (i.e. each data source should point to a file in the folder **Files for Tableau**).

To check this, choose a data source, right click on the source on the left hand toolbar and choose to **edit connection**. A window will pop up showing you the locations of the data source in your file system (see **Figure 6**).

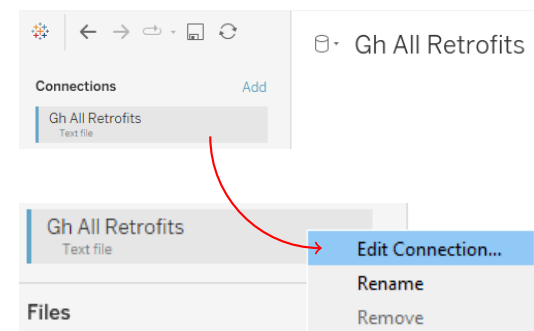


Figure 6: Updating data source location(s).

### 5 Quebec Tracking Number

Manually update the **QC Tracker Number \$** at the top of the dashboard **Placemats Data** (see **Figure 7**).

### 6 Bonus: Export Dashboard

Once all above steps are completed, the dashboard is ready to share/distribute. All export options can be found under “File” in the toolbar.

If the audience has Tableau Desktop or Viewer on their computers then you can choose “Export Packaged Workbook”. This allows the audience to benefit from the interactivity of the dashboard(s). Be aware that this includes a copy of the data with the visualization, so this file type should be considered as the same *protected* level as the data contained in the dashboard.

Otherwise, you can choose “Export As PowerPoint” to export each dashboard as a static image. Be aware that you must choose the dashboard(s) which you want to be exported to the PowerPoint document.

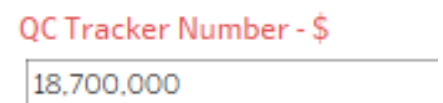


Figure 7: Quebec dollar amount parameter.