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| **Sankey Access Tool Hand guide** | |
| 1. Open the Tool and select “Choose File to Prep” |  |
| 1. Select file to perform data prep. |  |
| 1. Select the desired pillars for the Sankey Chart   **Note:** Only 2 steps are required. Adding a third is optional |  |
| 1. Select yes and save file in desired location.   Save file in desired location |  |
| 1. Open tableau and select Connect to Excel |  |
| 1. Find the Sankey Output file and connect |  |
| Tableau Worksheet setup | |
| 1. Place measures ‘Curve1’ onto the rows shelf 2. Change measure to Dimension |  |
| 1. Add measure ‘T’ to the columns shelf 2. Change measure to Dimension |  |
| 1. Add the items selected as pillar 1 & 2 (see step 3) into the detail shelf 2. Change the marks to line |  |
| 1. Create new work sheet and repeat steps 7-12 using ‘Curve 2’ and pillars 2 & 3 |  |
| 1. Crate a new worksheet and add the measure ‘Pillar1’ to the rows shelf. 2. Change measure to dimension. |  |
| 1. Change Marks to square (also can use custom shapes if desired) 2. Add variable chosen as pillar 1 (see step 3) to label marks card. |  |
| 1. Repeat steps 14-17 with pillars 2 & 3. |  |
| **Dashboard Setup** | |
| 1. Create new dashboard |  |
| 1. Pull in all work sheets side by side in the order listed ----------> |  |
| 1. Right click on the “T” axis and select edit axis. |  |
| 1. Hide the ‘T’ Axes by right clicking on the axis and unchecking “Show Header” |  |
| 1. Find pillar with largest Y Axis. Right click on the axis and select the “Edit Axis”. 2. Select “Fixed” on range. |  |
| 1. Fix the remaining Y Axis’s to the same range as the Axes in step 23. |  |
| 1. Hide all Axes by right clicking on an axis and unchecking “Show Header. |  |
| 1. Add variables to the marks cards to add color and size gradients |  |
| Note:  To add measure labels, connect to the original data source to avoid aggregation issues. | |

Sankey/Flow chart/Decision Tree Tableau Prep Tool