**Getting Started Guide: Tableau Prep flow and Tableau workbook for AIM Data Center (ADC) extracts**

Introduction

This document accompanies a Tableau Prep file entitled “All three Example files.tfl” and a Tableau workbook file entitled “ADC Extract Examples.twb”. These files serve only as an example and starting place for collaborative development using the ADC extract files as standardized data sources. Since these resources have not had the benefit of undergoing rigorous pilot testing due to changes in the AIM TA Center, users should verify these resources are working as intended prior to use. You are encouraged to partner with others to continue collaborative development of these resources.

You will need Tableau Prep and Tableau to make full use of these resources. Trial licenses may be available at no cost and can be useful to explore these resources prior to incurring any licensing costs (if you do not already have access to these applications). University or other partners may also have existing licenses and be willing to assist with your initial assessment.

Instructions

1. Download the ADC extract files for your state/territory. Save these CSV files in an appropriate location of your choice using these filenames:
   1. outcome\_extract.csv
   2. process\_extract.csv
   3. structure\_extract.csv
   4. hospital\_demographics.csv (optional - download if you plan to integrate it yourself)
2. Place the “Measures-All Measures.csv” file in the same directory as your downloaded data files above. This file accompanied this Guide and contains a snapshot of the AIM Measures for all bundles.
3. Open the Tableau Prep flow (All three Examples.tfl).
4. In the dark blue *Connections* panel on the left side of the screen (you may have to expand it if not fully visible), *Edit* each file path so it points to the location where you saved the corresponding files that you downloaded above. To do this, select each file and use the dropdown arrow to reveal the pop-up menu. Select *Edit* and navigate to and select the corresponding file on your computer. See the screenshot below. Be sure to do this for all three extract files.A screenshot of a computer

   AI-generated content may be incorrect.
5. Next, update the path for each of the six output files. Click on each of the 6 output steps list below and *Browse* to the location where you would like to save your output file. This is often the same location as the original source files. Although there are 4 output steps, *only one Excel file* will be generated (“ADC Extracts.xlsx”). This will be your main data source for the Tableau workbook. *Confirm that the settings, other than the file path, match the screenshot below. Each output name Worksheet name.* This will produce 6 worksheets within the same Excel workbook labeled as Process, Outcome, Structure, Structure KPI Latest, Structure KPI All, and Combined.

The Prep Output steps are labeled:

* 1. Just Process
  2. Just Outcome
  3. Just Structure
  4. Combined (not used in workbook – just provided for convenience)
  5. Structure KPI Latest
  6. Structure KPI All

A screenshot of a computer

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1. Save these flow updates.
2. Confirm there are no Alerts indicating remaining issues. If so, resolve the issues before continuing. (No issues are expected.)
3. Run the flow from the top Toolbar and confirm the ADC Extracts Excel file was created and contains all 6 worksheets within it. It will likely take several minutes to complete. The size of your data files is dependent on several factors such as your tenure with AIM, the number of Patient Safety Bundles you have worked on, the number of measures and categories you reported, etc.
4. Open the Tableau workbook file (ADC Extract Examples.twb).
5. You will get an error message. Click *Yes*.

A screenshot of a computer

AI-generated content may be incorrect.

1. Navigate (“Locate File”) to the ADC Extracts.xlsx file created by the flow above. This is likely in the same location as the files you initially downloaded from the AIM Data Center (depending on your choice in Step 5 above).
   1. This workbook is built using several distinct data sources that *each* need to be re-connected using the directions above. **As you initially navigate the workbook and visit each dashboard or worksheet, you will likely encounter the error message above several times.** Just go through the process above each time and *save the workbook* so it will not recur once you have reconnected all of the data sources/tables. The worksheets within the workbook are recognized as tables in Tableau. For simplicity, the tables (worksheets) are NOT set up as related in Tableau and thus each needs to be connected individually. All of the connections but one will use the same ADC Extracts Excel file but point to a different worksheet (table) within the file. One connection will use the Measures-All Measures.csv file described in Step 2 above.
2. Customize the workbook:
   1. The workbook is configured to use the field “hospital\_name” when showing hospital-level data. You may choose to swap the pill for this field with either “hospital\_unique\_identifier” or “masked\_name”. This may be useful to conceal hospital names in group settings where sharing facility names may not be desired.
   2. The workbook is configured to show data at the Quarterly level using the field “Year Qtr”. **If your data were collected at the Monthly level, you should swap the pill for this field with the “Year Month” field to ensure proper functionality/calculations.**

Contact [aimdatasupport@acog.org](mailto:aimdatasupport@acog.org) with any questions and remember to let us know if you make improvements that we may want to share. Thank you!