Instructions to open "Client Demographics Dashboard" in Tableau Desktop in order to visualize your own HUD CSV data:

What do you need before you start?
Generate a HUD CSV 6.1.2 export from your HMIS System. This will be in the form a Zip File, unzip all of the files into a folder, and take notice of where you have that saved. You will need to find it later.
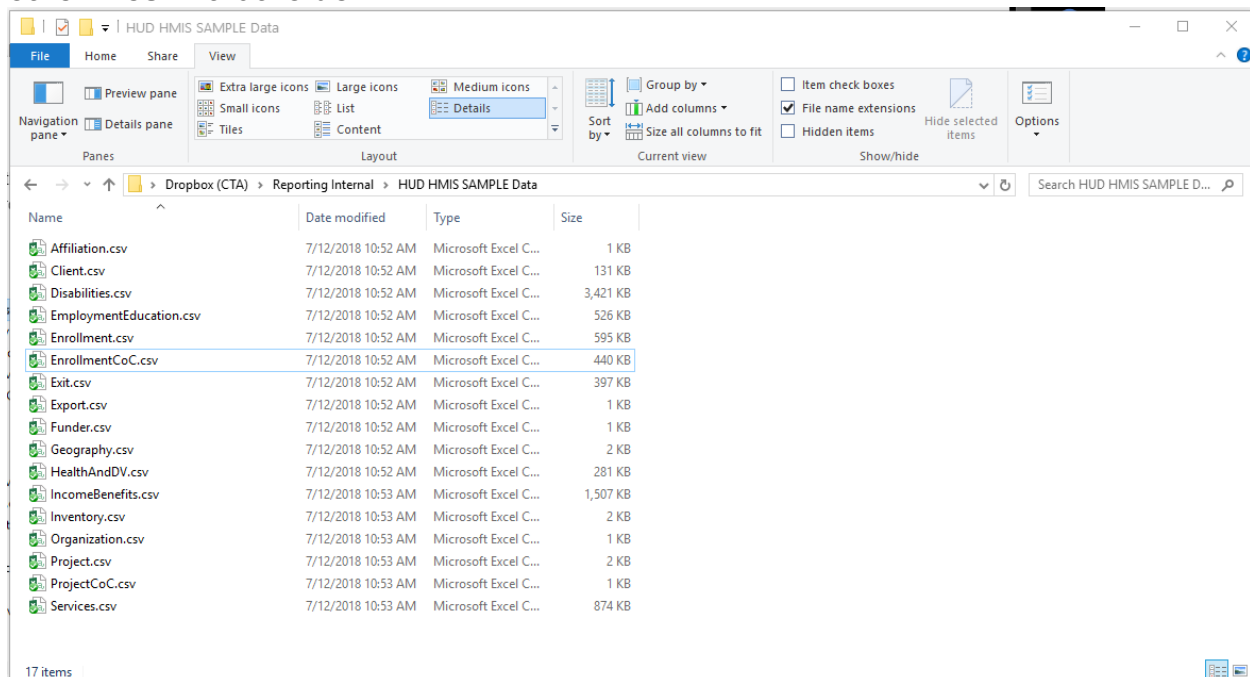
Make sure you have installed Tableau.
If you want to work with only the Sample Data Set included, you can use Tableau Desktop Public Edition for free. This will allow you to try to edit the dashboard and explore the functionality. If you are doing this option you can download the public version of this dashboard here
https://public.tableau.com/profile/ctagroup#!/vizhome/ClientDemographicsHUDCSV/Dashboard

Tableau Desktop Professional is available through Techsoup for eligible nonprofits. If you just want to try it out with your data, you can also download the trial version of tableau.
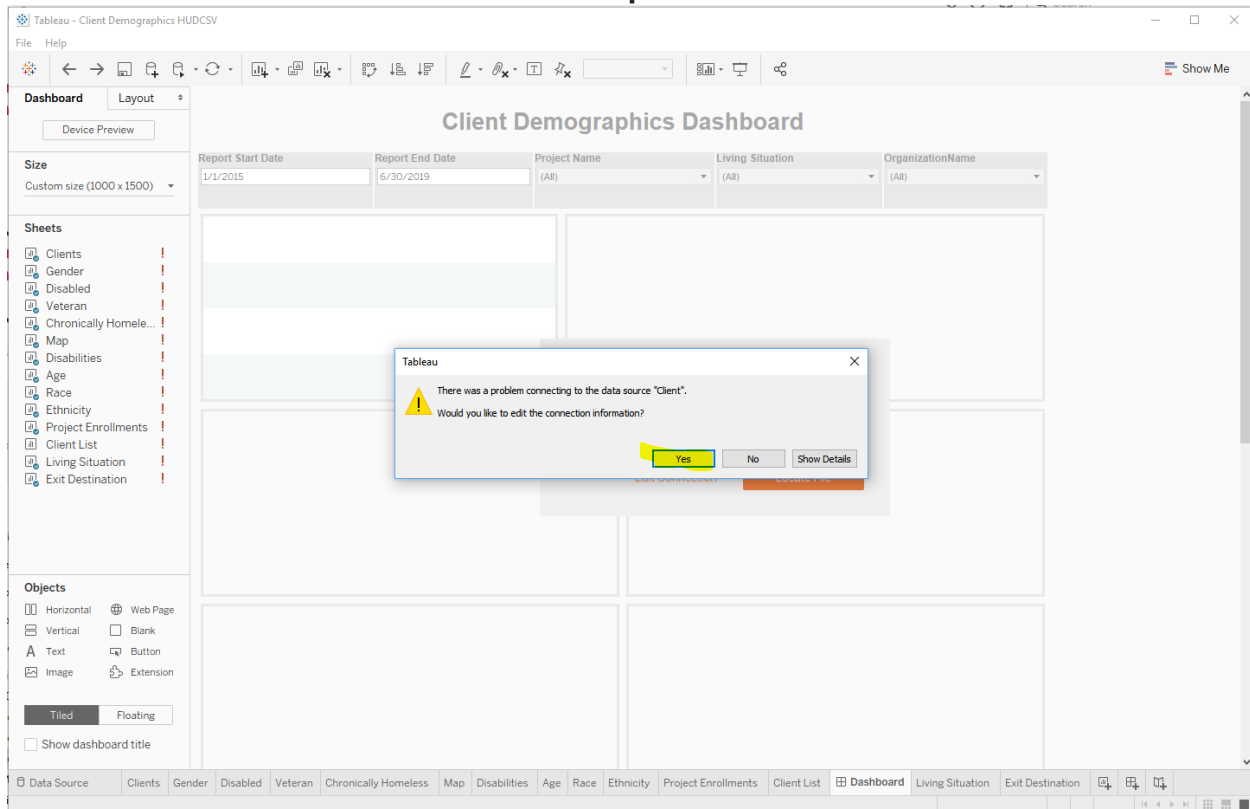
Make Sure your files are HUD Compliant. Sometimes Vendors may have errors in their version of the export. Some common errors would be things like column names that are not be capitalized correctly. (Tableau is case sensitive)

1. Make sure that all your HUD CSV files are in the same folder and there are no other files in that folder.

2. Find the Client Demographics HUDCSV.twb file that you downloaded. Double click to open it

3. Tableau will try to locate the source data files starting with the "Client.csv". Point to the correct folder as in the example below.

Click "Yes".

4. This opens the file selection dialog box which by default displays the current folder. Make sure this is the folder that contains all HUD csv files.
 Click "Open".

- CSV Files used by this report
    - Client.csv
    - Disabilities.csv
    - Enrollment.csv
    - Exit.csv
    - Geography.csv
    - Organization.csv
    - Project.csv

5. Select "Dashboard" Tab to display the "Client Demographics Dashboard"