

# PMT Lite User Guide

*Updated: November 2023*

## Quick Access

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## What is the PMT Lite?

The Performance Management Tracker Lite (PMT Lite) is a template Tableau workbook and data source for communities that would like to publicly share their BFZ metrics. It is closely modeled after the original PMT, but is a single page dashboard that only has your communities data.

The PMT Lite's intended use case is for when communities want to embed or share their PMT - but it is totally up to you on how you use it! If you have additional Tableau experience, you may find the PMT Lite as a nice starting point for a more custom dashboard.

## Getting Started

To get started building your PMT Lite, we suggest having the following files/data on hand:

1. Download the template files from the Built for Zero website. The files will download as a ZIP file containing 1) the Tableau workbook and 2) the Excel template data source.
2. Your historic monthly BFZ data metrics (actively homeless, inflow, outflow, etc.) to serve as the data source for your dashboard. We suggest grabbing as much historical data as you have available for a complete dashboard. If you don't have this data on hand, [bfzdatasupport@community.solutions](mailto:bfzdatasupport@community.solutions) can send you an export of data you've submitted.
3. The score and date for any BNL Scorecards you have taken, as well as the date you have achieved quality data for any subpopulation. Again, if you do not have access to this information, either reach out to your BFZ coach or send an email to [bfzdatasupport@community.solutions](mailto:bfzdatasupport@community.solutions).
4. Your most recent PIT Count (if reporting for Chronic, since it is used in the Functional Zero calculation)
5. A version of Tableau Desktop. If you do not already have a Tableau Desktop license, you can download the free version of Tableau Desktop [here](#).

## Setting up the Data Source

Once you have all the required materials, we will update the template data source to have your community's data. Begin by opening up the PMT Lite Excel file.

The template file has four tabs:

1. User Guide - this tab has helpful information on how to keep the data source updated and how to publish it to Tableau Public/Server. This information can also be found in this guide.

2. Data Dictionary - this tab contains details on how each of the fields in the workbook are calculated. Use this tab if you are ever in doubt about what a column means/what it is used for.
3. Subpopulation Info - this tab contains information about any BNL Scorecards you have taken for the relevant subpopulation. This is also where you can update your community's name, PIT Count (for chronic functional zero calculation) and Quality Data dates.
4. Monthly Data - this tab is where most of the magic happens and where you will be updating the data monthly. The columns should be fairly familiar to you if you have ever submitted data to Built for Zero.

### Step 1: Update the Subpopulation Info tab

Community	Population	Subpopulation	BNL Scorecard Date	BNL Scorecard Score	Number of Questions in BNL Scorecard	Quality Data Date	PIT Count
Community X	Single Adults	Chronic				3/1/2022	65,111
Community X	Single Adults	Veteran				10/1/2021	
Community X	Single Adults	All	2/1/2022	29	29		
Community X	Youth	All	3/1/2022	32	40		
Community X	Families	All	7/1/2022	48	51		
Community X	All	All					

In this tab, make sure you replace the template data with the data for your community. Only the cells that are not grayed out need to be updated.

### Step 2: Update the Monthly Data tab

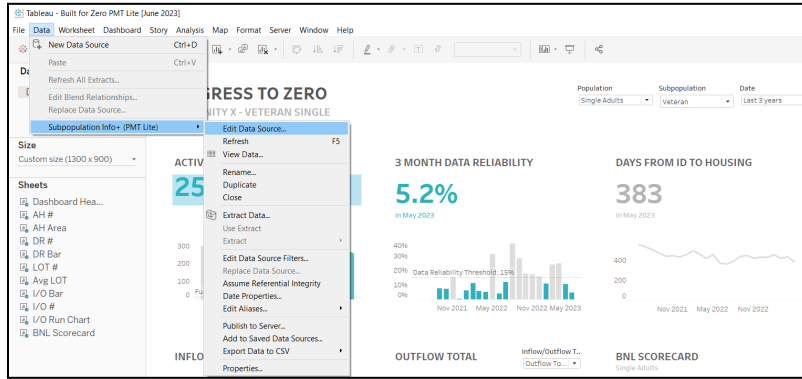
Population	Subpopulation	Month	Actively Homeless	Average Length of Time from Id to Housing	Housing Placements	Moved to Inactive	No Longer Meets Population Criteria	Newly Identified	Returned from Housing	Returned from Inactive	Actively Homeless Individuals in Families	1 Month Data Reliability	3 Month Data Reliability
Single Adults	Chronic	1/1/2022	295	430	22	4		13	3	2			
Single Adults	Chronic	2/1/2022	292	435	18	6		10	9	1		0.34%	
Single Adults	Chronic	3/1/2022	280	467	17	2	5	14	7	2		3.93%	
Single Adults	Chronic	4/1/2022	266	484	20	4	3	16	8	1		4.51%	8.27%
Single Adults	Chronic	5/1/2022	266	432	19	9	1	50	9	0		11.28%	19.92%
Single Adults	Chronic	6/1/2022	272	350	20	5		45	7	1		8.09%	23.53%
Single Adults	Chronic	7/1/2022	275	452	9	11	0	34	1	1		4.73%	23.64%
Single Adults	Chronic	8/1/2022	266	436	8	5	2	36	0	0		11.28%	24.44%
Single Adults	Chronic	9/1/2022	270	445	10	10	4	45	1	0		6.67%	22.59%
Single Adults	Chronic	10/1/2022	265	418	12	16	1	20	0	0		1.51%	16.60%
Single Adults	Chronic	11/1/2022	255	430	9	11	0	34	1	1		10.20%	15.69%
Single Adults	Chronic	12/1/2022	267	427	11	3	0	33	0	1		3.00%	11.24%
Single Adults	Veteran	6/1/2021	294	553	18	13	7	9	32	7			
Single Adults	Veteran	7/1/2021	287	530	22	3	6	11	10	34		10.80%	
Single Adults	Veteran	8/1/2021	292	502	20	9	5	9	4	40		4.79%	
Single Adults	Veteran	9/1/2021	290	467	16	31		13	7	3		7.59%	7.93%
Single Adults	Veteran	10/1/2021	284	437	18	16	2	15	0	2		4.58%	7.39%
Single Adults	Veteran	11/1/2021	304	443	16	7	0	19	6	6		3.95%	15.46%
Single Adults	Veteran	12/1/2021	295	430	12	2	2	18	8	4		7.80%	0.68%
Single Adults	Veteran	1/1/2022	290	454	9	4	5	13	6	2		2.76%	6.55%
Single Adults	Veteran	2/1/2022	295	491	6	10	5	15	10	4		1.02%	11.53%
Single Adults	Veteran	3/1/2022	250	460	18	40	0	13	3	1		1.60%	6.00%
Single Adults	Veteran	4/1/2022	230	416	20	23	0	26	1	1		2.17%	5.22%
Single Adults	Veteran	5/1/2022	292	454	18	28	5	11	1	1		34.25%	31.16%
Single Adults	Veteran	6/1/2022	190	370	28	0	5	17	0	1		45.79%	4.21%

In this tab, you will replace the template data with your own monthly data. The required data includes the 9 monthly metrics you already report to Built for Zero. Make a special note that you paste in any data in the appropriate columns. The last two grayed out columns are auto-calculated and do not require you to do anything. Once you've updated this tab, save your workbook.

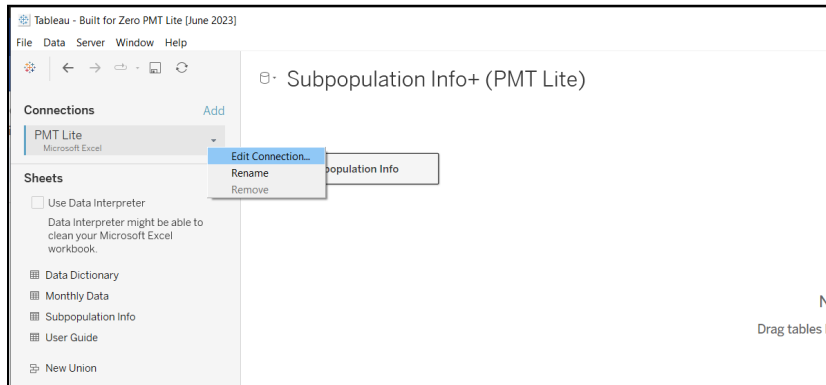
# Connecting the Data Source to the Tableau Workbook

At this point, switch over to the Tableau Workbook you downloaded in the ZIP file from the BFZ website. You will need a version of Tableau Desktop to open this workbook (see Getting Started if you don't have this already).

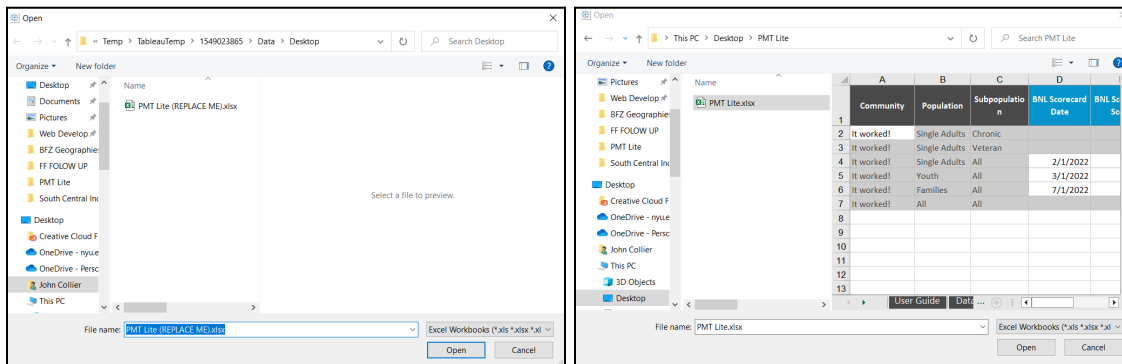
## Step 1: Update the Data Connection



Once you open up the workbook, go to Data > Subpopulation Info+ (PMT Lite) > Edit Data Source. It will bring you to the Data Source tab.



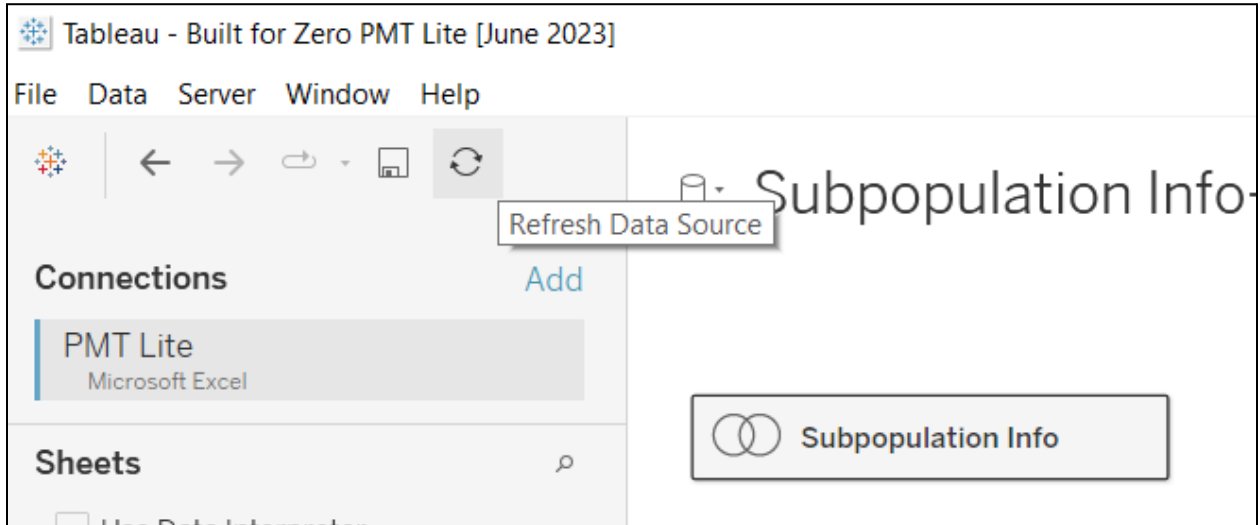
On this page, click the arrow next to the PMT Lite data connection and click "Edit Connection..." which will open a pop-up window. Navigate to the Excel file that you just updated and click "Open". (Note, the Excel file might need to be closed to properly connect).



## Step 2: Refresh and Verify Connection

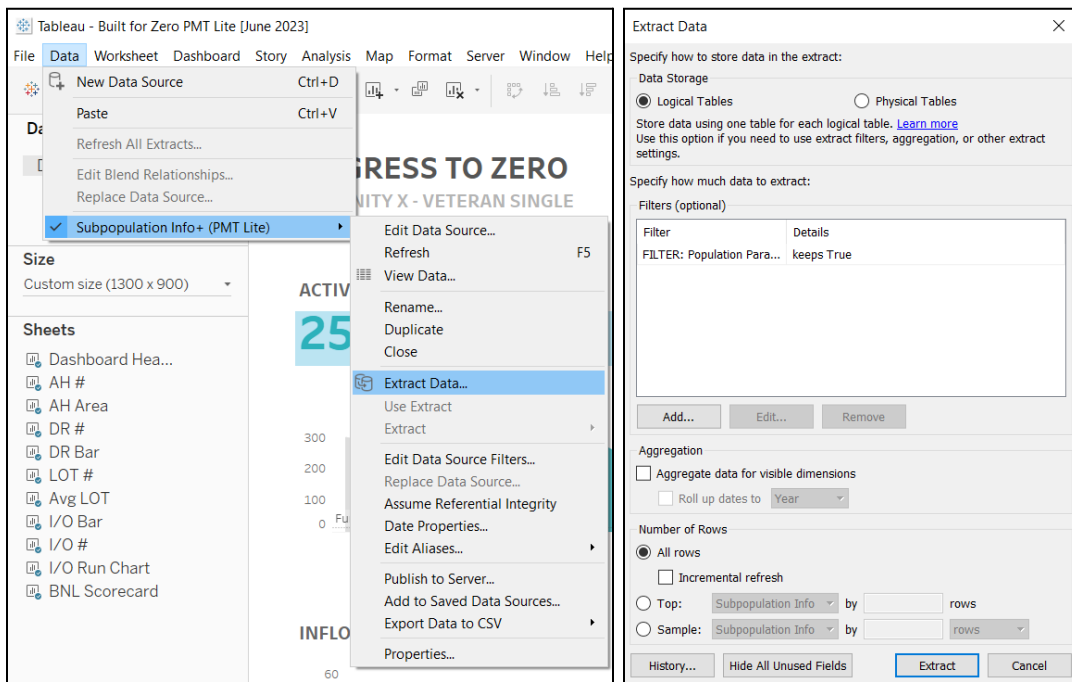
Once you have selected the Excel template file as the new data source, click "Refresh Data Source" to update the dashboard.

Navigate to the "Progress to Zero" tab on the bottom to return to the Dashboard. Double check that the dashboard is now using your data instead of the template data.



## Step 3: Create a Data Extract

Before moving on to publishing your dashboard, you may need to create a data extract. To do so, click Data > Subpopulation Info+ (PMT Lite) > Extract Data... Click the Extract button.



## Publishing the Dashboard

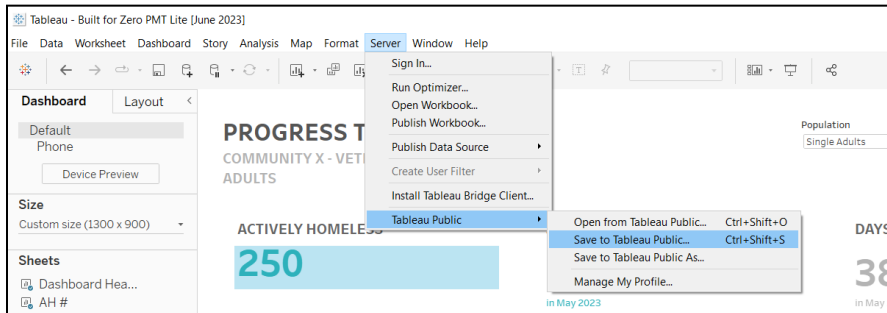
With your data updated in the Excel file and connected to the Tableau workbook - you are now ready to publish your dashboard so it can be shared/embedded. There are two methods to publishing your dashboard 1) Tableau Public or 2) Tableau Server.

### Publishing to Tableau Public

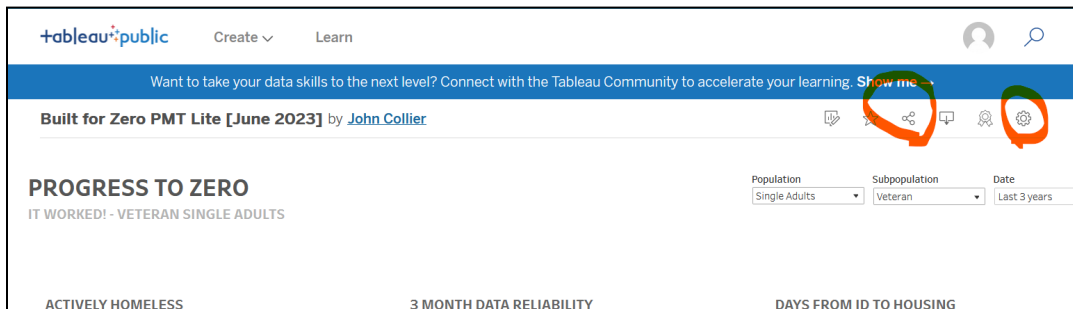
Tableau Public is a version of Tableau software specifically designed for public use, meaning that the visualizations created with Tableau Public are accessible to anyone on the internet. Keep in mind that visualizations created with Tableau Public are publicly accessible and can be viewed by anyone, but the underlying data may or may not be available for download, depending on the user's preferences. If you do not have a Tableau Server of your own - this is an easy and free alternative.

**Step 1:** Make sure you have a Tableau Public account. You can sign up for Tableau Public [here](#). Note, if you already have a Tableau account, you may already have a Tableau Public account.

**Step 2:** Sign in and Save to Tableau Public. From the dashboard, click Server > Tableau Public > Save to Tableau Public.



**Step 3:** Your dashboard will now be available on Tableau Public. You can share the link to the dashboard or can choose to embed it in a website using the options on the top right.



### Publishing to Tableau Server

Tableau Server is an enterprise-level platform provided by Tableau that allows organizations to deploy, manage, and collaborate on Tableau dashboards and visualizations. Unlike Tableau Public, which is designed for public sharing, Tableau Server is used within an organization's private network to share and collaborate on data visualizations securely. *Note, although Community Solutions used to provide access to a Tableau Server site, we have discontinued this service as of November 2023.*

If your community has a Tableau Server Site, click Server > Sign In... to sign in. Then click Server > Publish Workbook... to publish to your site.

## Updating the Dashboard

It is up to you to keep your dashboard up-to-date monthly. Unlike the Performance Management Tracker on the BFZ Community Portal, the PMT Lite must be manually updated since its data source is the templated Excel file.

If you decide to use the PMT Lite, we recommend setting a monthly reminder to update the dashboard at the same time you submit your monthly metrics. Updating the dashboard takes less than 5 minutes:

**Step 1:** Update the data in this spreadsheet with your community's data. Save the file.

**Step 2:** Open the Built for Zero PMT Lite Tableau workbook in Tableau Desktop.

**Step 3:** Click Data > Refresh All Extracts... Click the Refresh button. NOTE: You may have to close this spreadsheet while Tableau connects to it. Once the file is connected, you can reopen this spreadsheet.

**Step 4:** Republish the dashboard (using the steps above in the "Publish workbook" section).