



Tableau Data Doctor Slack Workflows Instructions

Introduction	2
Before getting started	2
Workflows	2
Workflow 1: “Ask a Tableau Question” form	2
Purpose	2
Implement	2
Reporting	4
Workflow 2: Welcome message	4
Purpose	4
Implement	4
Reporting	5
Workflow 3: Add an emoji reaction for resolved questions	6
Purpose	6
Implement	6
Reporting	8
Workflow 4: Add an emoji reaction for unresolved questions	8
Purpose	8
Implement	8
Reporting	10
Workflow 5: Add an emoji reaction for a standard answer	10
Purpose	10
Implement	10
Reporting	11
Share the Workflow(s)	11
Sample Reporting	12



Data Doctor

Introduction

Using Slack workflows can help you get useful insights out of Slack. In this document, we'll outline how to use Slack workflows to perform the following tasks:

- Show employees how to submit questions to a Data Doctor
- Gather topics/categories of questions that are being asked to identify training gaps
- Spot new power users in your Slack Channel to recruit them as new Data Doctors
- Report on the user engagement of your channel
- Get metrics on resolutions or escalations

Before getting started

We recommend following the below primary guidelines before diving into creating workflows:

1. Create a [public](#) Slack help channel (for example: #help-data-doctor) - this channel will be used by your internal Tableau community to ask questions.
2. If you have more than one Data Doctor in your organization, create a second private Slack [channel](#) (for example: #data-doctors-team) so that they can share resources, connect with each other, and discuss and organize new ways to enable your users.
3. Choose to implement any, or all the provided workflows in this document. Each has their own benefits.
 - a. If you are not sure where to start, or which one to select, we recommend implementing **Workflow 1: “Ask a Tableau Question” Form**.

Workflows

Workflow 1: “Ask a Tableau Question” form

Purpose

Create a Form workflow to capture the questions and issues your internal community is experiencing when using Tableau Products. Using a form to capture your questions will help collect topics, summary information, and additional details to track for your Data Doctor Program.

Implement

1. In your chosen Slack Workspace, select **Tools** (or **Go** on a Mac), then **Workflow Builder**.
2. Click **Create** and name your workflow. (For example: Ask a Tableau Question.)
3. Select **Shortcut** when asked for a way to start the workflow.



Data Doctor

4. Add the exact name of the Slack room used for Data Doctor questions (for example: #help-data-doctor) in the **Which channel?** field
5. Customize the name of your shortcut, for example “Ask a Tableau Question”
6. Click **Next**.
7. Click **Add Step**, select **Open Form**, and customize the following fields:
 - a. **Title:** Data Doctor Question
 - b. **Questions:**
 - i. Add a **Short answer** question, and name it: “Summary of your Question”
 - ii. Check **Make this required**.
 - iii. Add a **Select from a list** question, name it: “Select a Category” and add categories that best match the themes of questions you may be getting.
 1. We recommend starting with the following categories: Connecting to Data, Dashboard Design, Install/Upgrade, LODs/Calculations, Performance, Training, Web Authoring, Other.
 2. Select “Connecting to Data” as the default option or choose the category that is used the relevant to your organization.
 - iv. Check **Make this required**.
 - c. Click **Save**.
8. Click **Add Step**, select **Send a message**, and customize the following fields (screenshot follows):
 - a. **Send this message to:** Add the exact name of the Slack room used for Data Doctor questions (for example: #help-data-doctor)
 - b. Message text (customize as you see fit):

New Data Doctor Question

```
:bookmark_tabs: Category: {insert corresponding variable}  
:speech_balloon: Question: {insert corresponding variable}  
:bust_in_silhouette: From: {insert variable: Person who submitted form}
```

For example:

Message text

Insert a variable



Data Doctor

9. Click **Publish**. Note that publishing a workflow will add a notification to your Slack Room. We recommend publishing once the Workflow is ready to be launched and used.

(Optional Step)

Send a message to the person who used the Form to give them instructions on how to proceed, or where to go for more questions or information. Use this notification to deflect common questions or redirect your users to specific resources.

1. Click **Add Step**, select **Send a message**, and customize the following fields:
 - a. **Send this message to:** `{insert variable: Person who submitted form}`
 - b. Message (customize as you see fit):
Hi {insert variable: Person who submitted form}"
Thanks for submitting a question! A Tableau Data Doctor will try their best to provide an answer shortly in the thread of your original post in {insert variable: Channel where workflow started}
10. Don't forget to click **Publish** to save your changes.

Reporting

1. In your chosen Slack Workspace, select **Tools**, then **Workflow Builder**.
2. Click the three dots icon and select **Download Form Responses** to see all the questions asked by category and connect to this file using Tableau.
 - a. Note that the file will only contain questions, not responses or emojis.

Important: if you have the option to enable Google Sheets automation, please note that Google Sheets does not capture dates and times of the form submission (at the time of writing these instructions). In other words, you will not be able to report on historical data.

Workflow 2: Welcome message

Purpose

Create a Welcome message workflow to inform your Slack users about what to expect, how to ask a question, where to find the most essential information, and deflect easy questions. This message will be triggered and sent to their individual Slackbot when they **join** your Data Doctor channel for the first time.

Implement

1. In your chosen Slack Workspace, select **Tools** (or **Go** on a Mac), then **Workflow Builder**.
2. Click **Create** and name your workflow. (For example: Welcome)
3. Select **New channel member** when asked for a way to start the workflow.



Data Doctor

4. Add the exact name of the Slack channel used for Data Doctor questions (for example: #help-data-doctor) in the **Which channel?** Field.
5. Click **Add Step**, select **Send a message**, and customize the following fields (screenshot follows):
 - a. **Send this message to:** {insert variable: Person who joined channel}
 - b. Message (customize as you see fit):
Hi {insert variable: Person who submitted form}
Thanks for joining the Data Doctor channel! Here is all you need to know to get started in this channel: <insert instructions>

11. Click **Save**.
12. Click **Publish**. Note that publishing a workflow will add a notification to your Slack channel. We recommend publishing once the Workflow is ready to be launched and used.

Reporting

No built-in reporting is available for this specific workflow. However, if the Google Sheets app is added to your workspace, you may select to add a spreadsheet row to an existing spreadsheet.



Workflow 3: Add an emoji reaction for resolved questions

Purpose

Create an emoji reaction in your Slack channel to trigger specific thread messaging and instructions for your users. For this specific workflow, we'll create a way to understand how many questions are resolved using a specific `:check mark:` emoji.

Important: the emoji you select must have a unique name; emojis with multiple names will not trigger the workflow.

Implement

1. In your chosen Slack Workspace, select to **Tools** (or **Go** on a Mac), then **Workflow Builder**.
2. Click **Create** and name your workflow. (For example: Resolved Data Doctor Questions)
3. Select **Emoji reaction** when asked for a way to start the workflow.
4. Add the exact name of the Slack channel used for Data Doctor questions (for example: #help-data-doctor) in the **Which channel?** field
5. Select a unique emoji when clicking **Add Reaction**. For example `:check:` 
6. Click **Next**.
7. Click **Add Step**, select **Send a message**, and customize the following fields (screenshot follows):
 - a. **Send this message to:** `{insert variable: Message thread}`
 - b. Message (customize as you see fit):

```
{insert variable: Person who reacted}
```

has indicated this question is resolved. No further action is needed. However, if you still need help, please remove the `:check:` emoji and click the "I still need Help" button or create a new request under the `:shortcuts:` menu.



Data Doctor

Send a message

Send this message to:

Message thread

Message text

Person who reacted has indicated this question is resolved. No further action is needed from you.

However, if you still need help, please remove the 🟢 emoji and click the "I still need Help" button, or create a new request under the ⚡ menu.

Include a button
You can add a button to this message. Clicking it will move people to the next step of the workflow.

I need help (Notify team)

Remove Cancel Save

- c. (Optional) Check the **Include a button** option to create a button action in thread and name the button "I still need help (notify team)"
8. Click **Add Step**, to trigger the notification from the button by selecting **Send a message**, and customize the following fields:
 - a. **Send this message to:** select the Data Doctor private channel (for example: #data-doctors-team)
 - b. Message (customize as you see fit):

Hi Data Doctors,
Looks like {insert variable: Person who clicked <button's name>} still needs help.
Please reach out if you can: {insert variable: Link to message reacted on}
9. Click **Publish**. Note that publishing a workflow will add a notification to your Slack channel. We recommend publishing once the Workflow is ready to be launched and used.



Reporting

No reporting is available for this specific workflow. As a workaround, a specific command will help you identify the number of times a specific emoji is used as a thread reaction in the channel.

1. In the search bar, type a command using the following template in the search bar:
`in:#slack channel name has::emoji name:`
 - a. For example: `in:#help-data-doctor has::check:`
2. To filter the emoji reaction by dates, type a command using the following template in the search bar: `in:#slack channel name has::emoji name: after:YYYY-MM-DD before:YYYY-MM-DD`
 - a. For example: `in:#help-data-doctor has::check: after:2021-05-06 before:2021-05-09`
3. Ensure the “**Hide apps, bots, and workflows**” is **not** checked.
4. Manually add the number of search results in a calculated field in Tableau. For example:
`({number of results counted on Slack}/COUNT([Questions Slack field]))*100`

Encourage your internal community to use consistent emoji reactions because the total number of emojis can be used to calculate the percentage of resolved or unresolved questions.

Workflow 4: Add an emoji reaction for unresolved questions

Purpose

Create an Emoji reaction in your Slack Channel to trigger specific thread messaging and instructions for your users. For this specific workflow, we'll create a way to understand how many questions could not be resolved and needed to be escalated using the `:redalert:` unique emoji.

Important: the emoji you select must have a unique name; emojis with multiple names will not trigger the workflow.

Implement

1. In your chosen Slack Workspace, select **Tools** (or **Go** on a Mac), then **Workflow Builder**.
2. Click **Create** and give a name to your workflow. For example: Resolved Data Doctor Questions.
3. Select **Emoji reaction** when asked for a way to start the workflow.
4. Add the exact name of the Slack channel used for Data Doctor questions (for example: `#help-data-doctor`) in the **Which channel?** field
5. Select a unique emoji when clicking **Add Reaction**. For example `:redalert:`  `:redalert:`



Data Doctor

6. Click **Next**.
7. Click **Add Step**, select **Send a message**, and customize the following fields (screenshot follows):

- a. **Send this message to:** {insert variable: Message thread}
- b. Message (customize as you see fit):

```
{insert variable: Person who reacted}, thank you for indicating that you need further help - the Tableau Data Doctor Team has been notified. In the meantime, here are your next steps:
```

 - + If you do not hear back from anyone within <xH>, please join <Office Hours> to ask your question.
 - + If someone resolves your question, please remove the RedAlert emoji (:redalert:) and mark your original question as resolved using the unique :check: option.

Send a message

Send this message to:

Message thread

Message text

Person who reacted, thank you for indicating that you need further help - the Tableau Community Team has been notified. In the meantime, here are your next steps:

- If you do not hear back from anyone within <xH>, please join the <Office Hours> to ask your question.
- If someone resolves your question, please remove the RedAlert emoji (🚨) and mark your original question as resolved using the specific ✅ option.

Insert a variable

8. Click **Add Step** to trigger the notification from the button by selecting **Send a message**, and customize the following fields:
 - a. **Send this message to:** select the Data Doctor private channel (for example: #data-doctors-team)
 - b. Message (customize as you see fit):

```
Hi Data Doctors,  
Looks like {insert variable: Person who clicked <button's name>} still needs help.  
Please reach out if you can: {insert variable: Link to message reacted on}
```



9. Click **Publish**. Note that publishing a workflow will add a notification to your Slack channel. We recommend publishing once the Workflow is ready to be launched and used.

Reporting

No reporting is available for this specific workflow. As a workaround, a specific command will help you identify the number of times a specific emoji is used as a thread reaction in the channel.

1. In the search bar, type a command using the following template in the search bar:
`in:#slack channel name has::emoji name:`
 - a. For example: `in:#help-data-doctor has::redalert:`
2. To filter the emoji reaction by dates, type a command using the following template in the search bar: `in:#slack channel name has::emoji name: after:YYYY-MM-DD before:YYYY-MM-DD`
 - a. For example: `in:#help-data-doctor has::redalert: after:2021-05-06 before:2021-05-09`
3. Ensure the “**Hide apps, bots, and workflows**” is **not** checked.
4. Manually add the number of search results in a calculated field in Tableau. For example:
`({number of results counted on Slack}/COUNT([Questions Slack field]))*100`

Encourage your internal community to use consistent emoji reactions because the total number of emojis can be used to calculate the percentage of resolved or unresolved questions.

Workflow 5: Add an emoji reaction for a standard answer

Purpose

Create an emoji reaction in your Slack channel to trigger specific thread messaging and instructions for your users. This specific workflow will post an automated message when a common question is asked.

Important: the emoji you select must have a unique name; emojis with multiple names will not trigger the workflow.

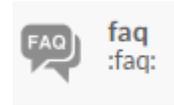
Implement

1. In your chosen Slack Workspace, select to **Tools** (or **Go** on a Mac), then **Workflow Builder**.
2. Click **Create** and give a name to your workflow. (For example: Refer to Intranet/FAQ.)
3. Select **Emoji reaction** when asked for a way to start the workflow.



Data Doctor

4. Add the exact name of the Slack room used for Data Doctor questions (for example: #help-data-doctor) in the **Which channel?** field
5. Select a unique emoji when clicking **Add Reaction**. For example :faq:
6. Click **Next**.
7. Click **Add Step**, select **Send a message**, and customize the following fields:
 - a. **Send this message to:** {insert variable: Message thread}
 - b. Message (customize as you see fit):



*That's a great question! Please refer to the FAQs on the intranet <Link>
for instructions on how to proceed next!*

8. Click **Publish**. Note that publishing a workflow will add a notification to your Slack channel. We recommend publishing once the Workflow is ready to be launched and used.

Reporting

No reporting is available for this specific workflow. As a workaround, a specific command will help you identify the number of times a specific emoji is used as a thread reaction in the channel.

5. In the search bar, type a command using the following template in the search bar:
`in:#slack channel name has::emoji name:`
 - a. For example: `in:#help-data-doctor has::faq:`
6. To filter the emoji reaction by dates, type a command using the following template in the search bar: `in:#slack channel name has::emoji name: after:YYYY-MM-DD before:YYYY-MM-DD`
 - a. For example: `in:#help-data-doctor has::faq: after:2021-05-06 before:2021-05-09`
7. Ensure the **“Hide apps, bots, and workflows”** is **not** checked.
8. In Tableau, create a calculation that contains this total to visualize how many times users were referred to your intranet/FAQs.
 - a. For example, if the emoji was used twelve times, simply write “12” in your calculated field.

Share the Workflow(s)

Once your workflows are complete, remember to share and train your administration team on how they can be updated and managed.

- **Add collaborators:** Should you need to share your workflows with other managing or administrative teams (IT, executives, or sponsors), select **Tools** (or **Go** on a Mac), click on **Workflow Builder**, select your workflow, and collaborators in **Settings**.



Data Doctor

- **How to use the workflow:** Provide training documentation (list of steps, video, or GIF, pinned to the channel) and advise all your internal community to use it.

For additional help on creating, running, updating, or deactivating Workflows, see the [Guide to Workflow Builder in Slack's Help Center](#), or work with your Slack Administrator/IT team.

Sample Reporting

To view an example of how insights from Slack can be interpreted, please use the workbook in the [Data Doctor toolkit](#) you downloaded.



Tableau Community Slack Workflow Data

Last Updated: June 2, 2021

Total Questions Asked

32

Re-use of Slack Workflow by User

9%
91%

Questions Resolved

78%

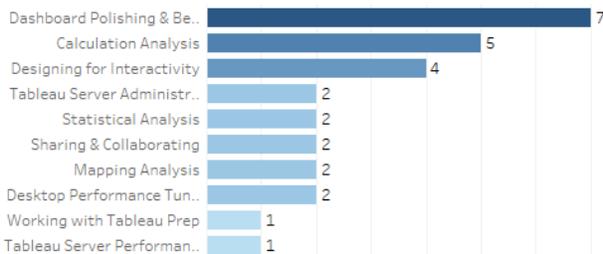
Escalated Questions

16%

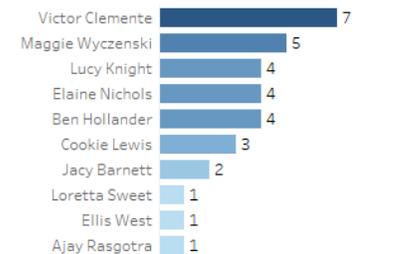
Unrated Questions

6%

Top Categories



Top Service Users (*fictive names*)



Questions Details

21 March 2021

A frequently-occurring requirement for me is to build workbooks where one dashboard (target) gets filtered by selections from *multiple* charts ..

After we upgraded to 2020.2.1 from a 2018 version, we have had several reports of users experiencing an "Unexpected Server error" while the se...

Best practice of how to refresh data each week/month

Best Practices for KPI Dashboards

Convert existing dashboards into mobile versions

Couple questions on dashboard functionality.

Dashboard navigation review and feedback.

Discuss multiple workbooks containing intense calculations and pulling from multiple data sets. These workbooks are combined into one dashboa...

Get help with choosing measure with action

Hello. I am having difficulty with census data that I am working with. Numbers are duplicating after I apply a filter and add data.

I am in IT where we track a number of KPIs. Incidents(breaks), Service Requests, etc. I currently have that data broken out by multiple inboxes equ...

Example of a Tableau Dashboard