



Sharing Insights

Tableau Day 3



Sharing Insights: Content

- Format view for presentation
 - Use color
 - Use bolding
 - Use shapes
 - Change size of marks
 - Select fonts
- Create and modify a dashboard
 - Create a dashboard layout
 - Add interactive or **explanatory** elements
 - [Add dashboard actions](#)
 - Modify existing dashboard layout for mobile devices
 - Create a story using dashboards or views
 - Share a twbx as a PDF
 - Share a twbx as an image

All content here is covered in the [Getting Started](#) video.



1

Upload Data



2

**Create Visuals with
Data**



3

**Share what we've
made**

Formatting

Format Font

A

Fields

Sheet Rows Columns

Default

Worksheet: Tableau Book..

Pane: Tableau Book..

Header: Tableau Book..

Tooltip: Tableau Book..

Title: Tableau Light..

Total

Pane: Tableau Medi..

Header: Tableau Book..

Grand Total

Pane: Tableau Medi..

Header: Tableau Book..

Clear

Format Alignment

A

Fields

Sheet Rows Columns

Default

Pane: Automatic

Header: Automatic

Total

Pane: Automatic

Header: Automatic

Grand Total

Pane: Automatic

Header: Automatic

Clear

Format Shading

A

Fields

Sheet Rows Columns

Default

Worksheet:

Pane: None

Header: None

Total

Pane: None

Header: None

Grand Total

Pane: None

Header: None

Row Banding

Pane:

Header:

Band Size: 1 2 3 4 5 6 7 8 9 10

Level: 1 2 3 4 5 6 7 8 9 10

Column Banding

Pane:

Header:

Band Size: 1 2 3 4 5 6 7 8 9 10

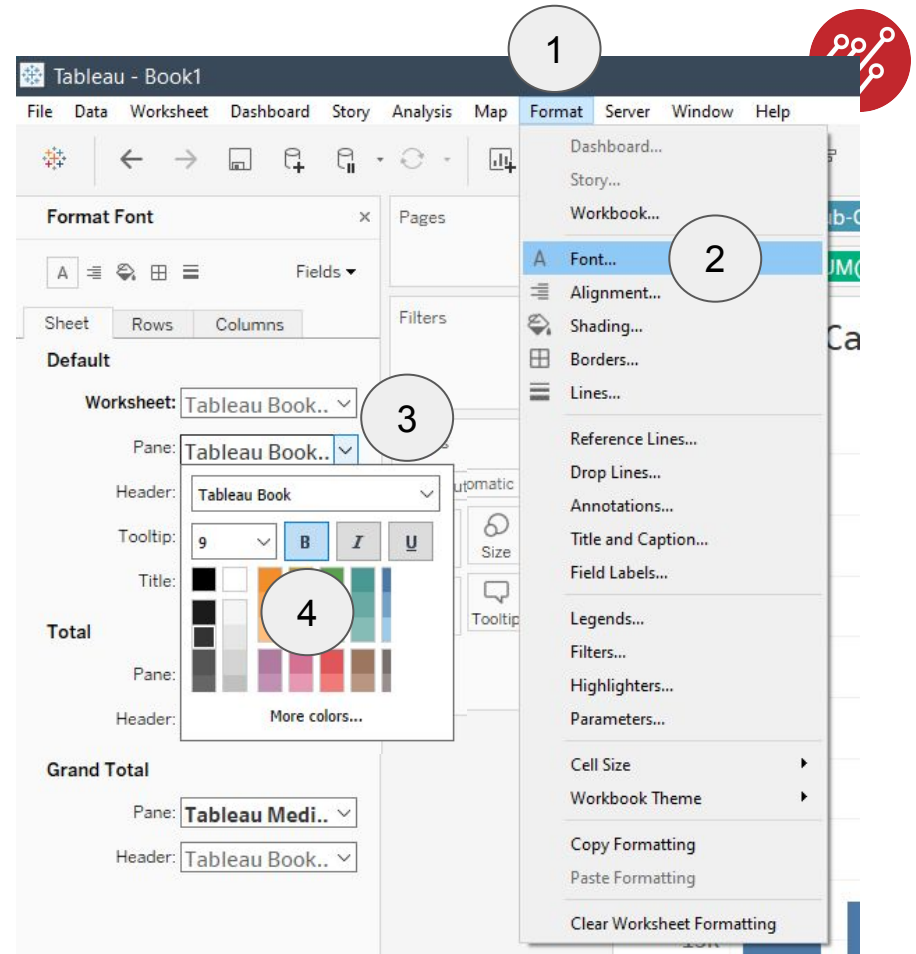
Level: 1 2 3 4 5 6 7 8 9 10

Clear



Bolding, Color, and Fonts

1. Select Format
2. Click Font
3. Select dropdown for the text you want to change
4. Make your desired changes



Changing Axis Marks

1. Right Click the Axis
2. Select Edit Axis
3. Select Tick Marks
4. Make your desired changes

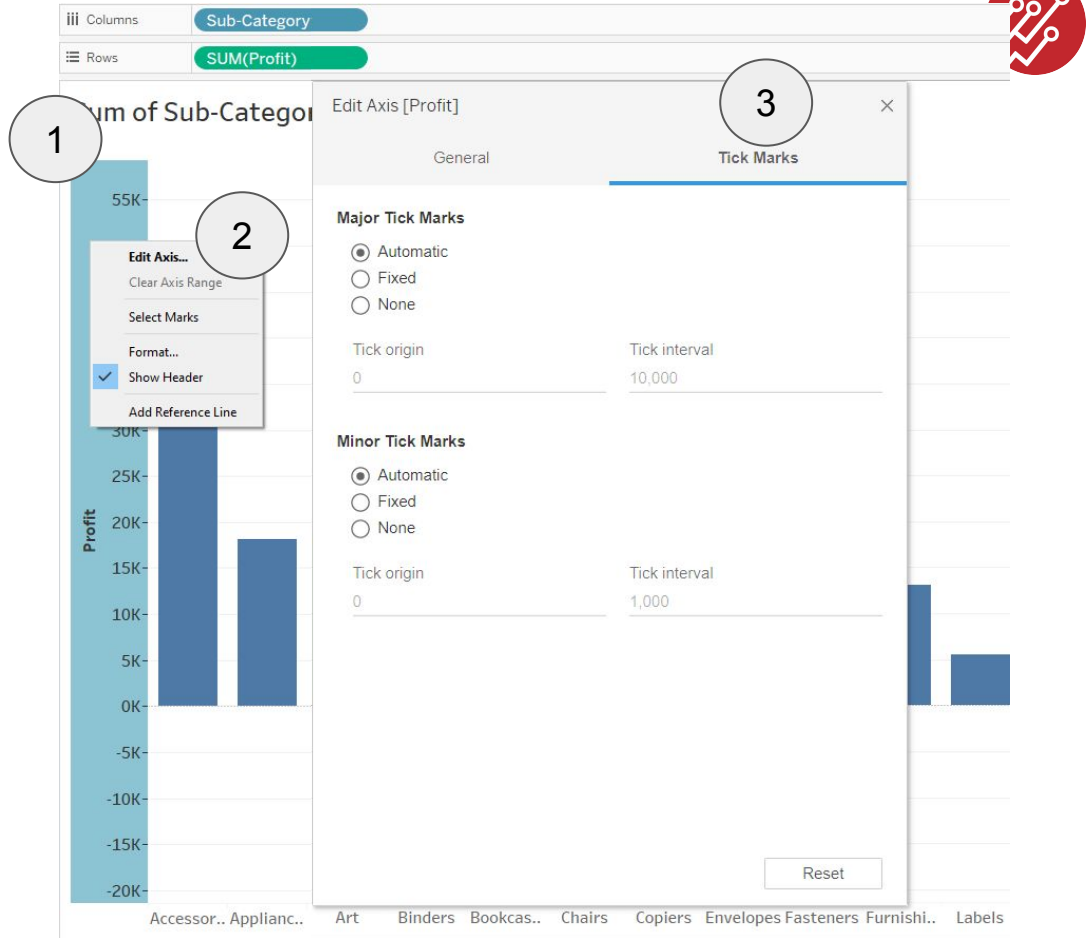




Tableau Dashboard

We use dashboards to pull our worksheets together in one place

Used to:

- Monitor
- Explore
- Inform



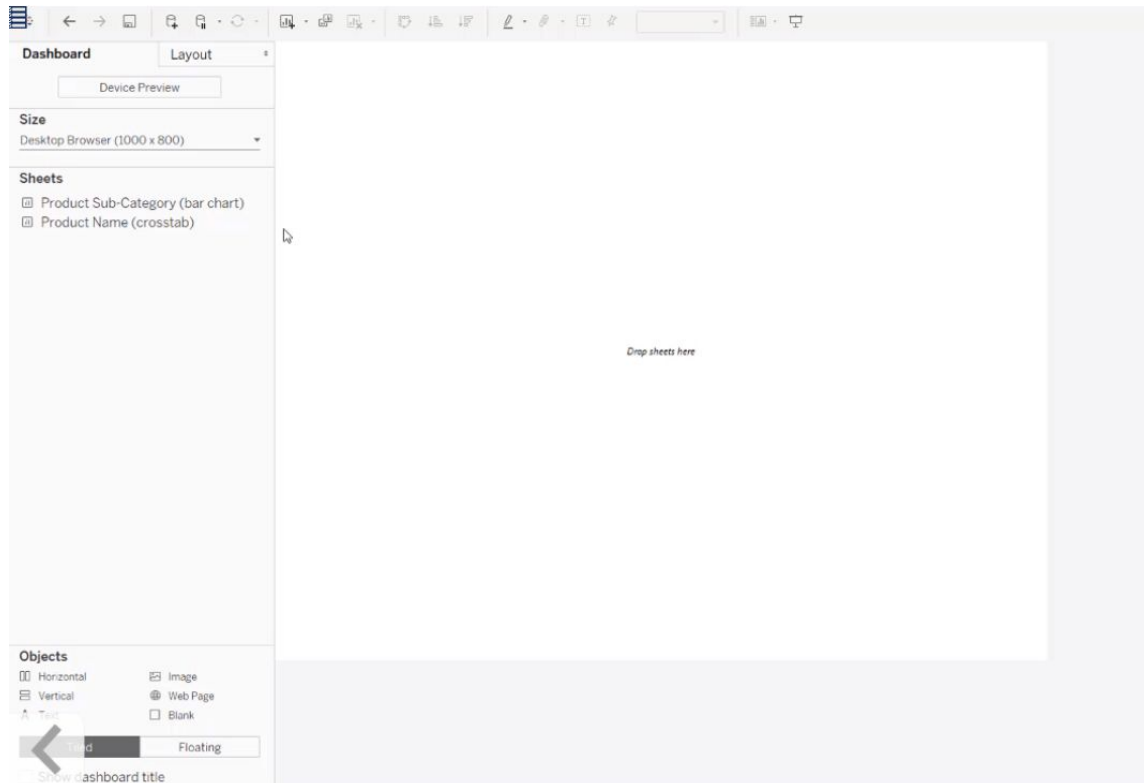
» Which of the following are reasons to build a dashboard? Select all that apply.



- ☐ Explore relationships in data.
- ☐ Inform a user about an analysis.
- ☐ Reduce questions asked of data.
- ☐ Monitor the status of data.

Submit

Modify Existing Dashboard Layout for Mobile Devices

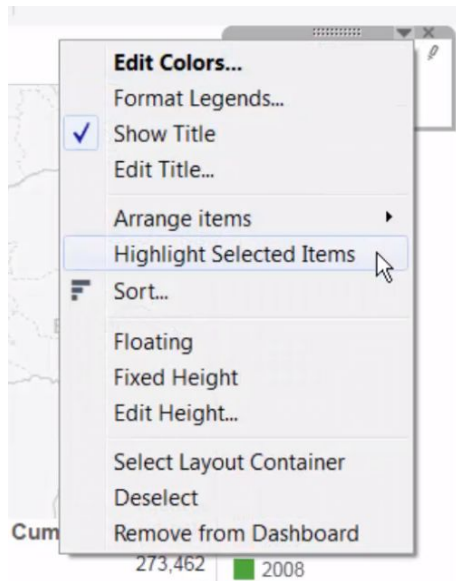


- Sheets
- Size - what device will your user be viewing your work on?



Interactive or Explanatory Elements: Legend Highlights

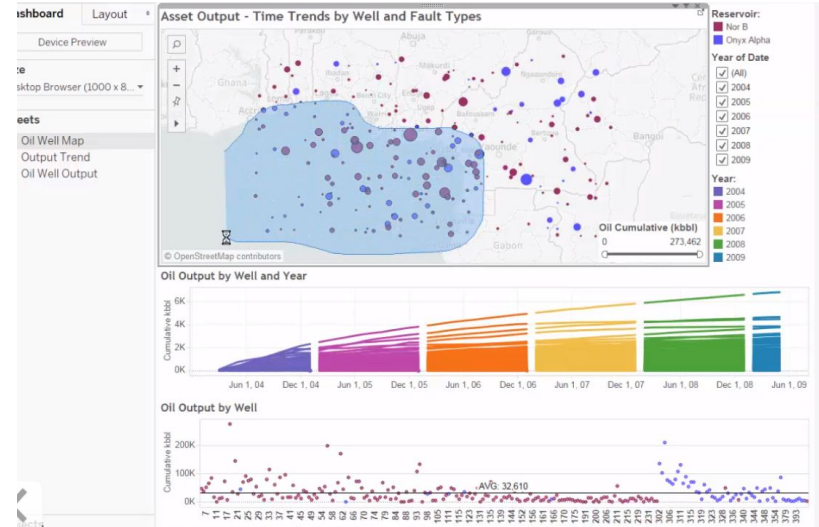
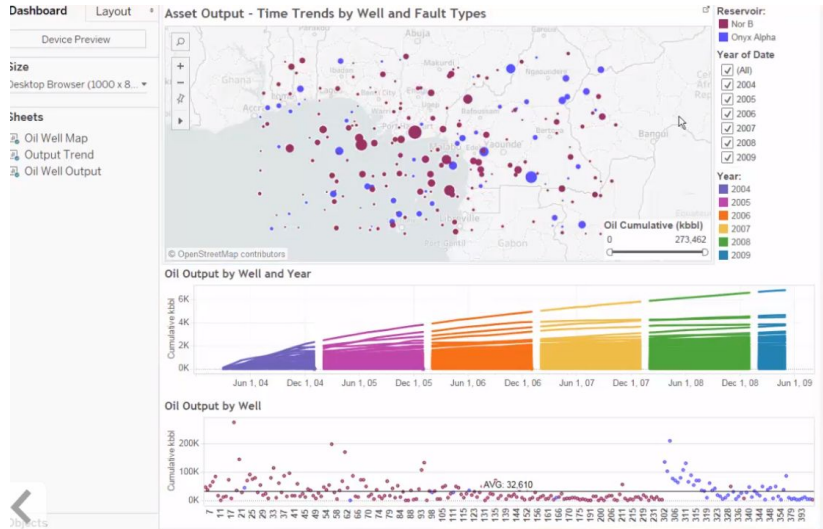
Legend highlights help data to stand out from other marks





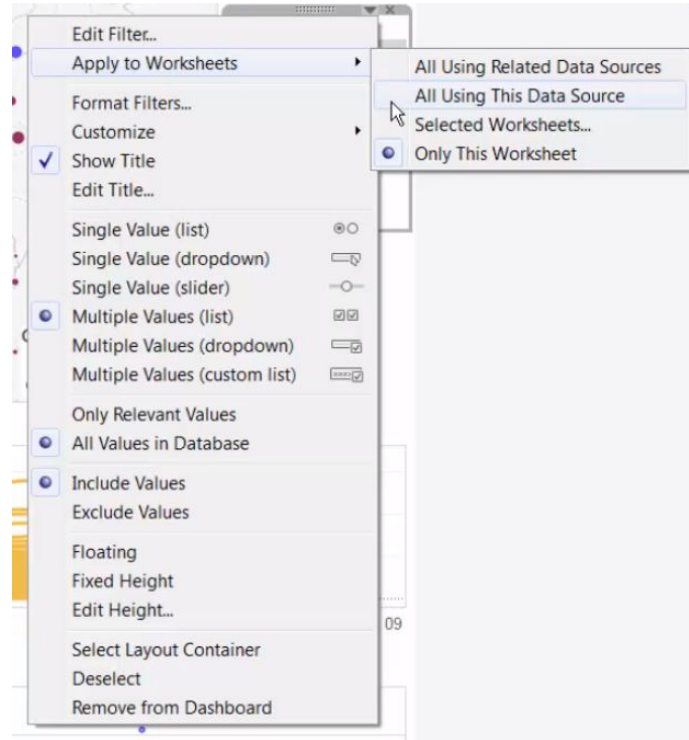
Interactive or Explanatory Elements: Use a View As A Filter

The marks you select in one view will filter results of other views in your dashboard





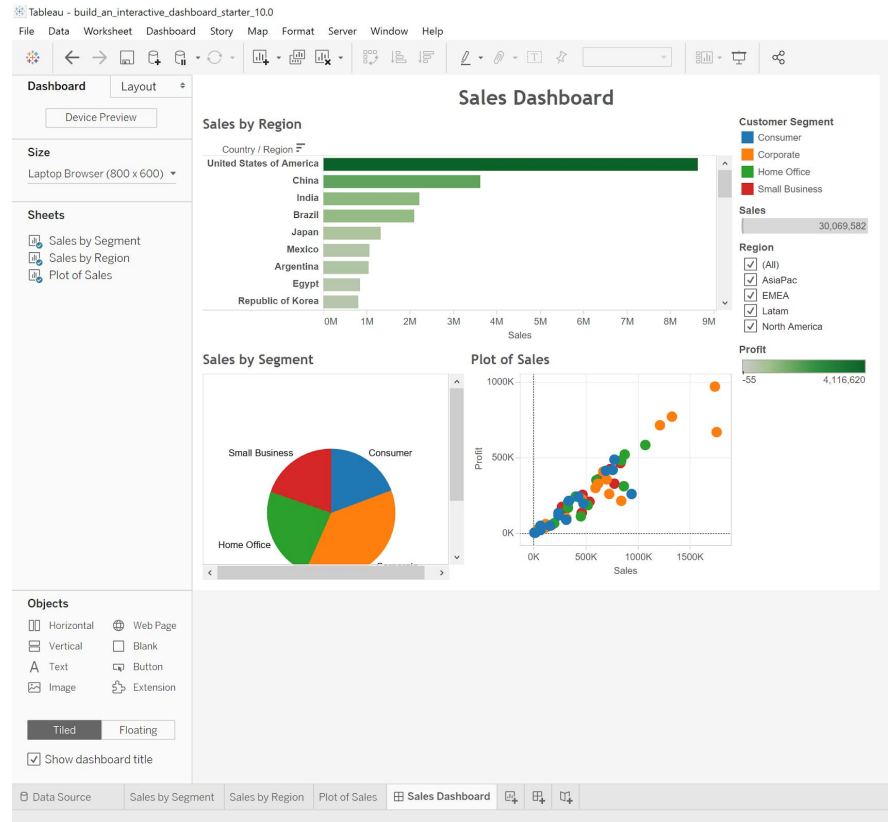
Interactive or Explanatory Elements: Apply Filter to All Worksheets



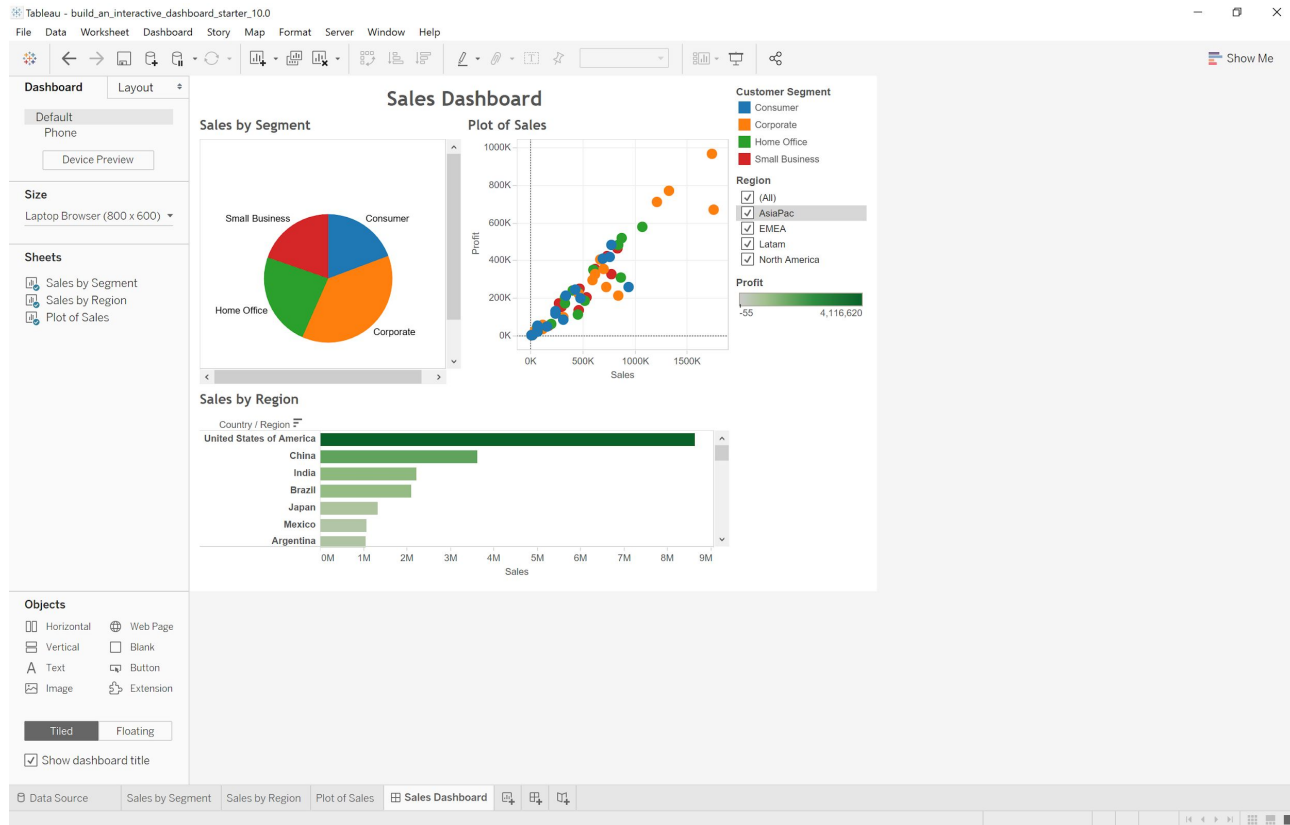


- 1 Create a new Laptop Browser-sized dashboard titled "Sales Dashboard" that shows the title.
- 2 Bring in all three views. Adjust Sales by Segment and Plot of Sales to fit the Entire View.
- 3 Remove the Sales legend, adjust the title position, and make the legends and filter visible.
- 4 Set up the Region quick filter and the Sales by Segment view to filter the entire dashboard.
- 5 Preview your final view and test your filters.

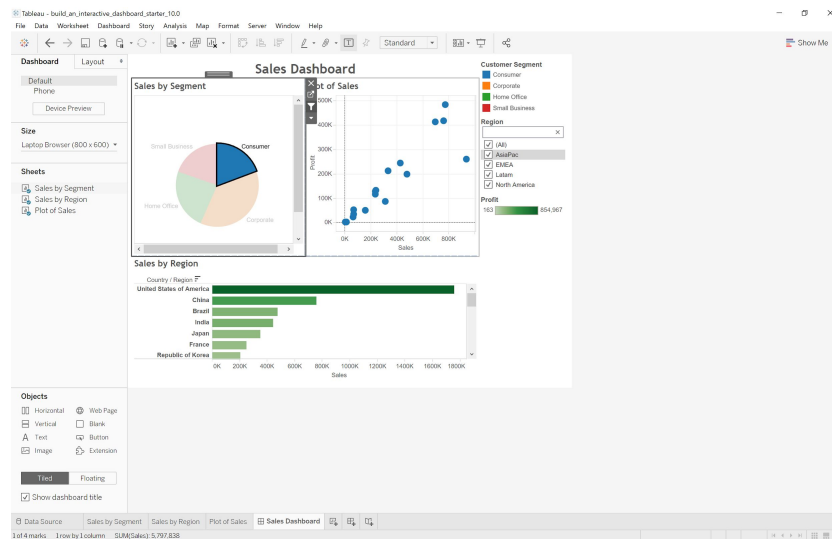
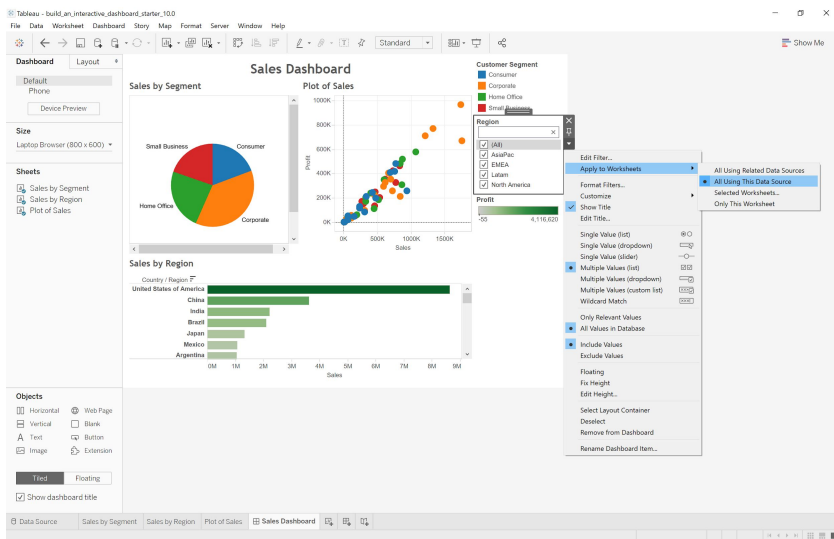
Dataset



Part 1 & 2 Answer



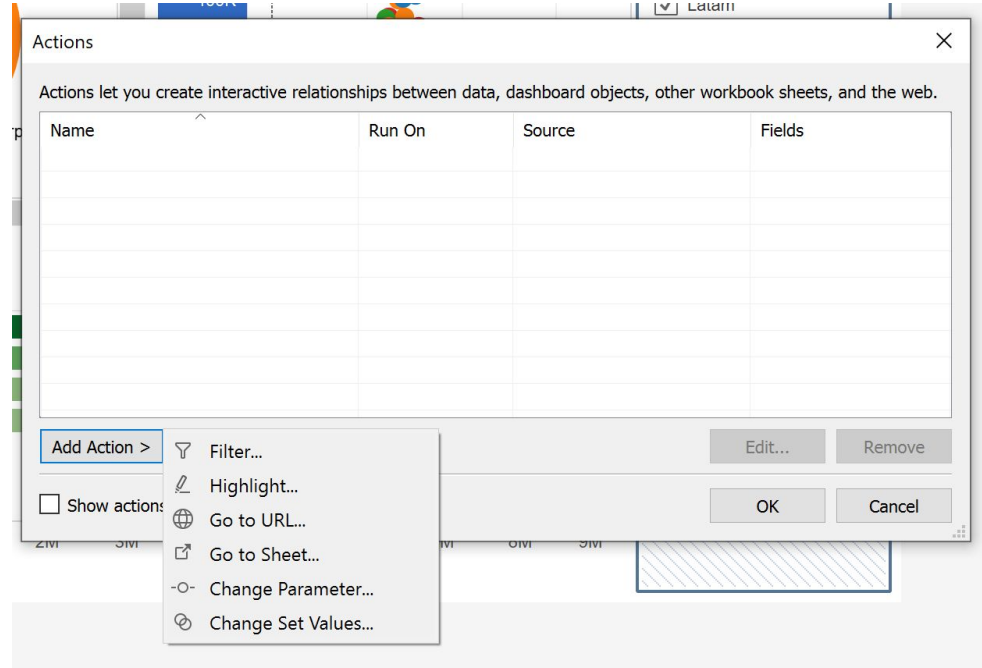
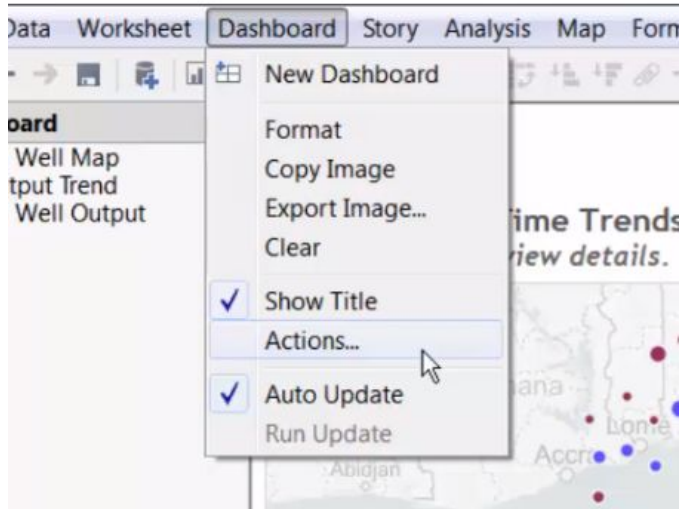
Part 3 Answer



Part 4



Dashboard Actions



Highlight Actions



Add Highlight Action ✕

Name: ▶

Source Sheets

☐ Sales Dashboard

Run action on:

☐ Plot of Sales

☒ Sales by Region

☒ Sales by Segment

Target Sheets

☐ Sales Dashboard

☒ Plot of Sales

☒ Sales by Region

☒ Sales by Segment

Target Highlighting

☐ Selected Fields

☐ Dates and Times

☒ All Fields

☐ Category

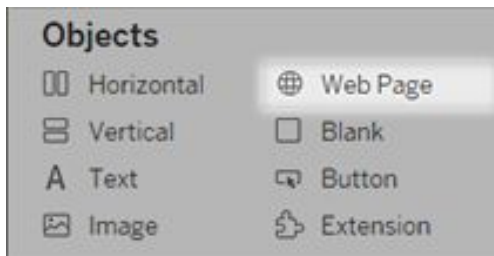
☐ Country / Region

☐ Customer Segment



Add Dashboard Actions: URL

1. Drag a **Web Page** object onto your dashboard, and enter a URL.



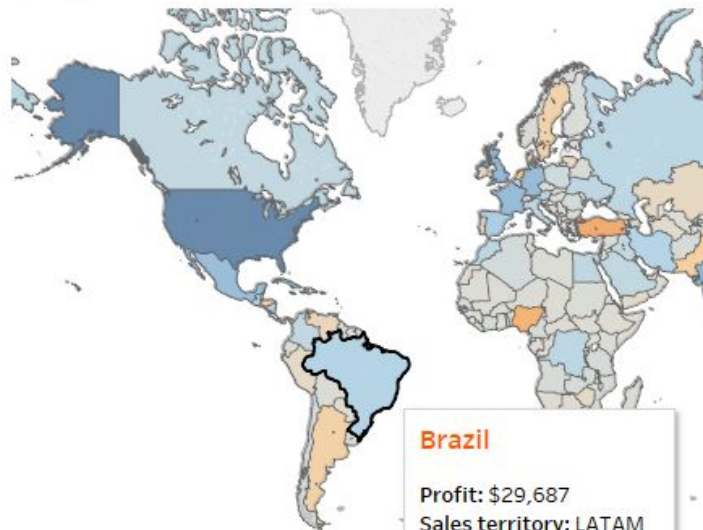
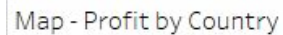
2. In the Actions dialog box, click **Add Action** and then select **Go to URL**.

3. Specify a name for the link.



4. Enter URL; needs http:// prefix

5. For URL Target, select **Web Page Object**, and select the object you created in step 1.



Profit: \$29,687
Sales territory: LATAM

[More details...](#)

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- [Current events](#)

Article

Talk

Read

Brazil

From Wikipedia, the free encyclopedia

This article is about the country. For other uses, see [Brazil \(disambiguation\)](#).

Brazil (ⁱ/brəˈzɪl/; Portuguese: *Brasil* ⁱ/brəˈziw/^[10]), officially the **Federative Republic of Brazil** (Portuguese: *República Federativa do Brasil*, ⁱ/rɛpubɪkəˈfɛdɛrətivəˈdoˈbrɐzɪl/^[11]), is the largest country in both **South America** and **Latin America**. As the world's fifth-largest country by both **area** and **population**, it is the



Which is the best description of the action being demonstrated below?



- Oil Well Map
- Output Trend
- Oil Well Output

- Horizontal
- Image
- Vertical
- Web Page
- A Text
- Blank

- New objects:
- Tiled
 - Floating

Layout

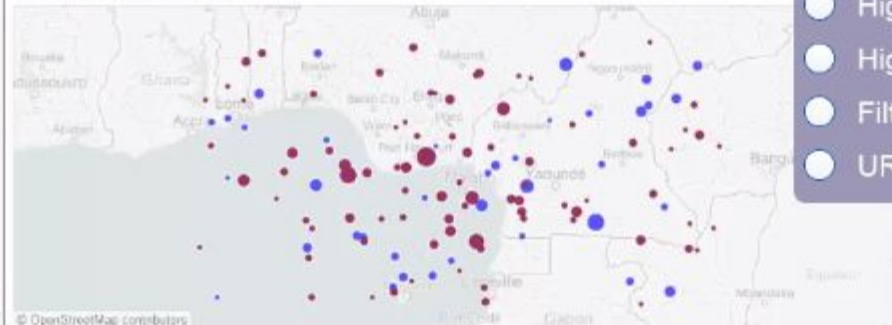
Dashboard

Tiled

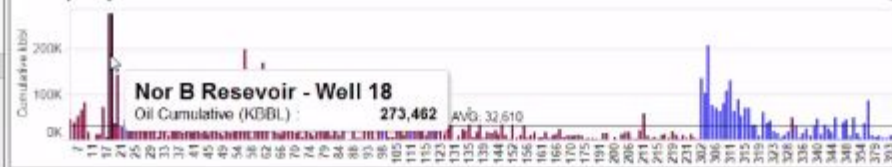
Oil Well Output

- Pos: x 0 y 450
- Size: w 940 h 198
- ☒ Show Title ☐ Floating

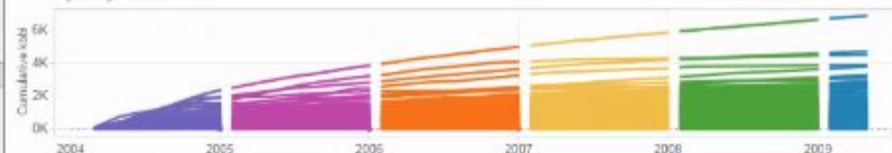
Asset Output - Time Trends by Well and Fault Types
Select or lasso to view details.



Oil Output by Well



Oil Output by Well & Year



Fault Block

- ☐ Highlight action on a menu
- ☐ Highlight action on a select
- ☐ Filter action on a hover
- ☐ URL action on a menu

Oil Cumulative (kbl):

15,552 273,462

Highlight Reservoir:

☒ Nor B

☐ Oryx Alpha

Highlight year:

☒ 2004

☐ 2005

☐ 2006

☐ 2007

☐ 2008

☐ 2009

Submit



Create a Story Using Dashboard or Views

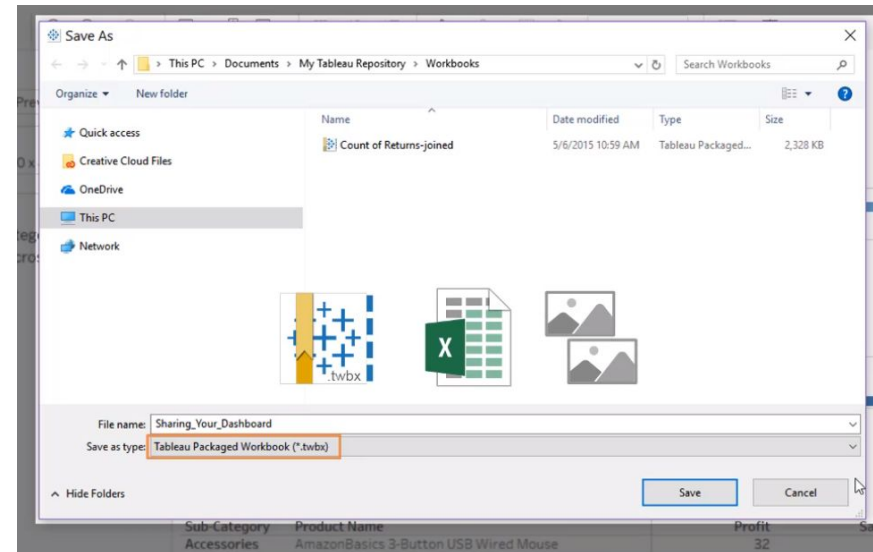
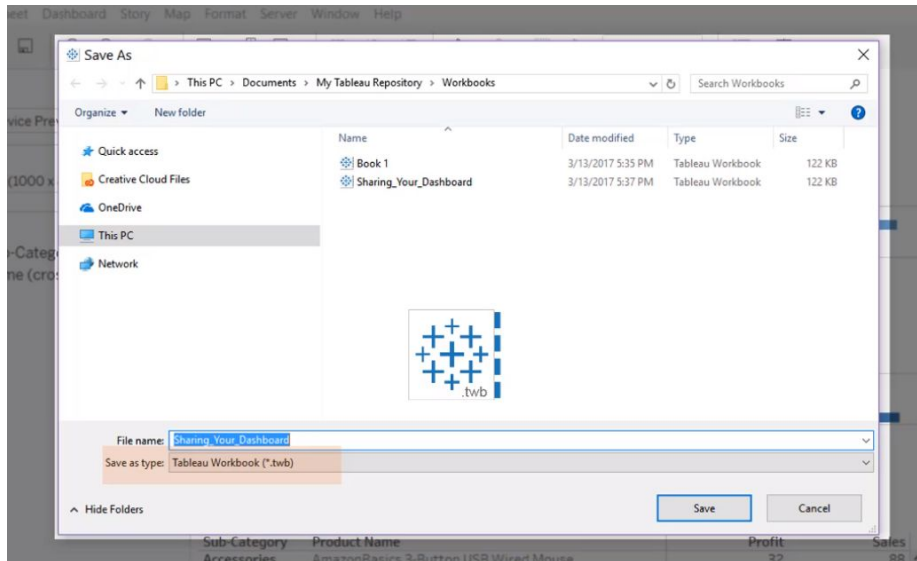
1. Create Story
2. Drag Dashboard into story

Tableau Workbook (twb) vs Tableau Packaged Workbook (twbx)



Twb: Saves connection to file, but not the data source file (default)

Twbx: Packaged workbook has data file and any other data you've used in your views





Share twbx as an image

To export the file in Tableau Desktop:

1. Select **Worksheet > Export> Image**.
2. In the Copy Image dialog box, select the contents you want to include in the image and the legend layout (if the view contains a legend).
3. Click **Save**.
4. In the Save Image dialog box, navigate to where you want to save the image file and type a file name into the text box. Select a file format from the Save as type drop-down menu.
5. Click **Save**



Share a twbx as a PDF

File > Print to PDF



Understanding Tableau Concepts



Data Fields

- Data fields are made from the columns in your data source
- Each field is automatically assigned a...
 - Data **Type**: (such as integer, string, date)
 - Data **Role**: Discrete Dimension or Continuous Measure (more common) ... or Continuous Dimension or Discrete Measure (less common)

Discrete Dimensions

Product Name

Common

Continuous Dimensions (dimensions with a data type of String or Boolean cannot be continuous)

YEAR(Order Date)

Discrete Measures

SUM(Profit)

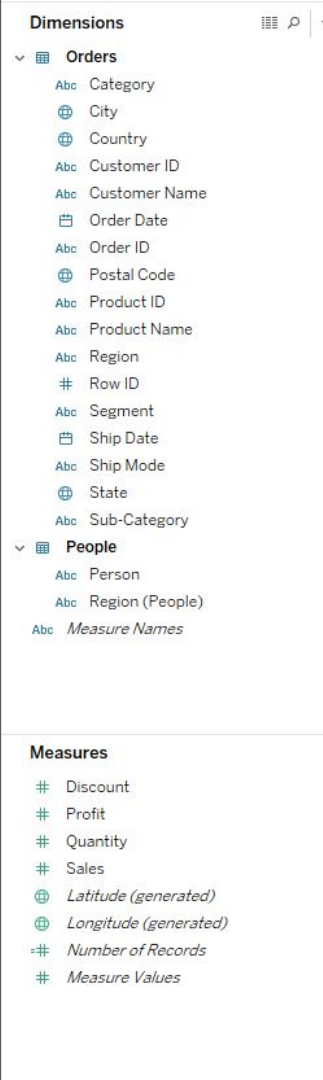
Continuous Measures

SUM(Profit)

Common

Dimensions

- Contain **qualitative** values (such as names, dates, or geographical data)
- You can use dimensions to categorize, segment, and reveal the details in your data
- Dimensions affect the level of detail in the view



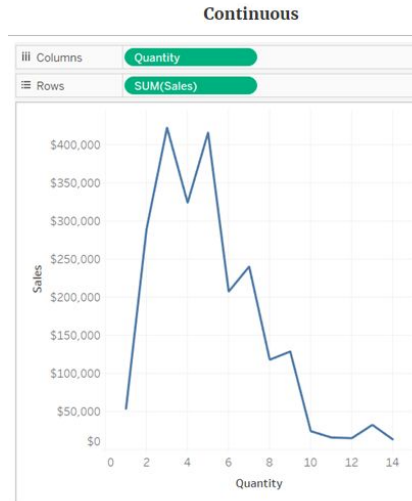
Measures

- contain numeric, **quantitative** values that you can measure
- Measures can be aggregated
- When you drag a measure into the view, Tableau applies an aggregation to that measure



Continuous

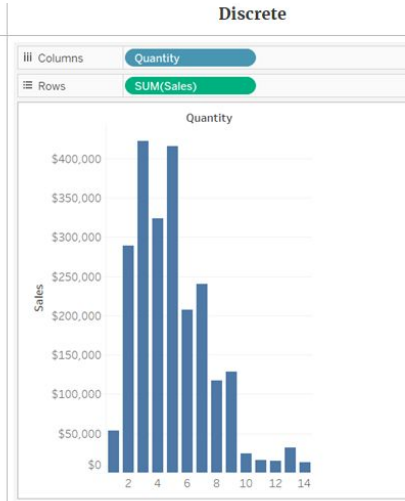
- Means "forming an unbroken whole, without interruption"
- Treated as an infinite range
- Generally add axes to the view



Discrete



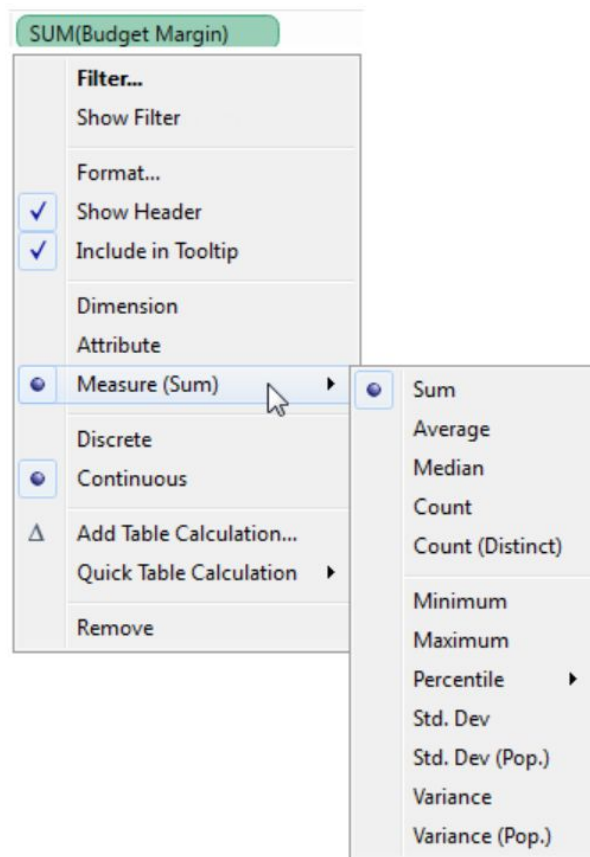
- Means "individually separate and distinct"
- Discrete values are treated as finite
- Generally add headers to the view





Aggregation

- When you add a measure to the view, Tableau automatically aggregates its values
- Aggregations include:
 - Sum
 - Average
 - Count
 - Etc
- Usually for Measures, but can be used on Dimensions
- Dimensions can be Minimum, Maximum, or Count





Attributes

- Another way to view a Dimension
- Returns the value of the given expression if it only has a single value for all rows in the group, otherwise it displays an asterisk (*) character
- Particularly useful when aggregating a dimension

ATTR(Sales)



Summary: Understanding Tableau Concepts

- Dimensions and measures
 - Explain what kind of information dimensions usually contain
 - Explain what kind of information measures usually contain
- Discrete and continuous fields
 - Explain how discrete fields are displayed in Tableau
 - Explain how continuous fields are displayed in Tableau
 - Explain the difference between discrete date parts and continuous date values in Tableau
- Aggregation
 - Explain why Tableau aggregations measures
 - Describe how an aggregated measure changes when dimensions are added to the view