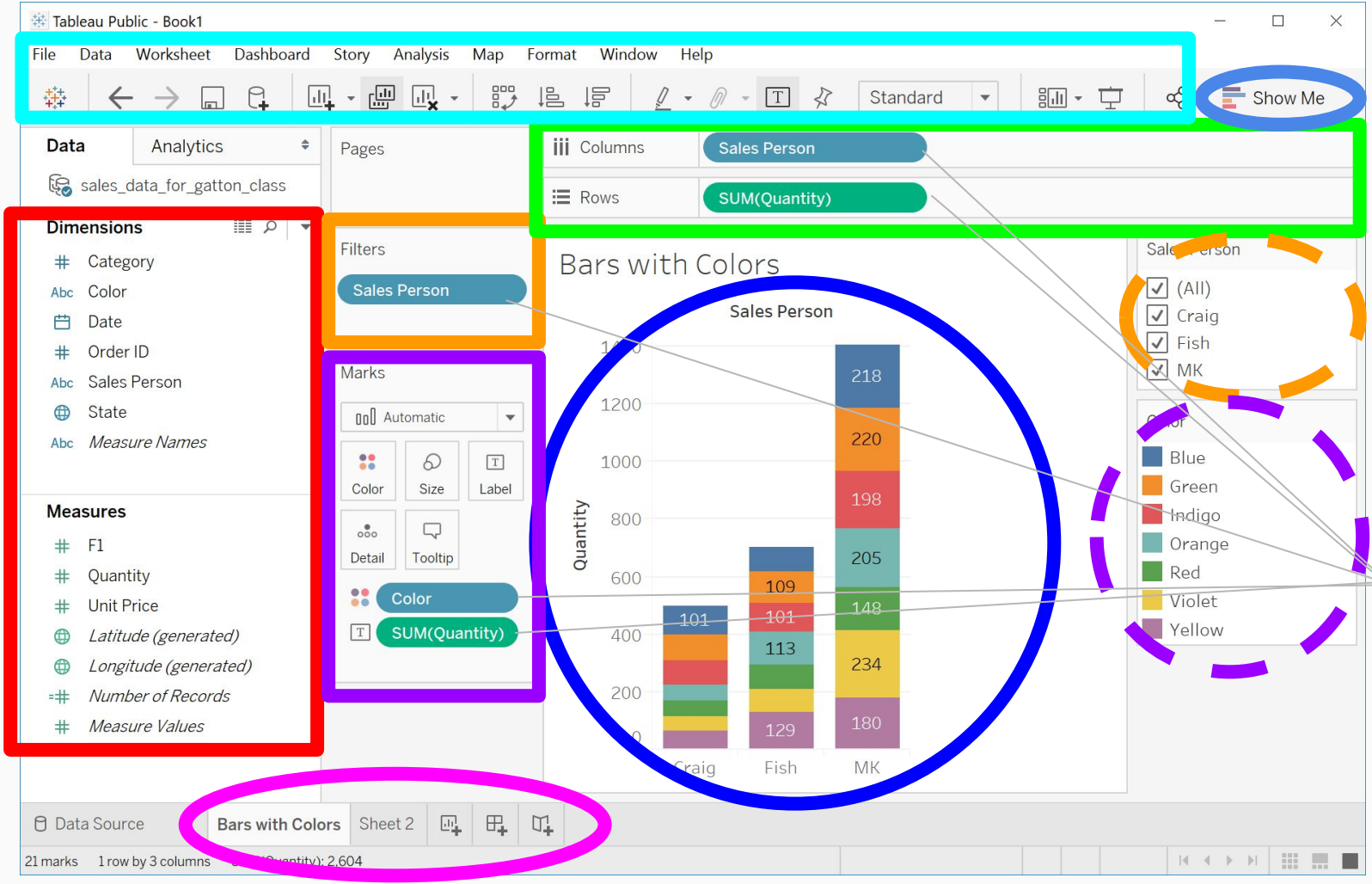


Menus & Quick Options

Data Fields

Rows & Columns Shelves

Filters Shelf
-Interactive Filter

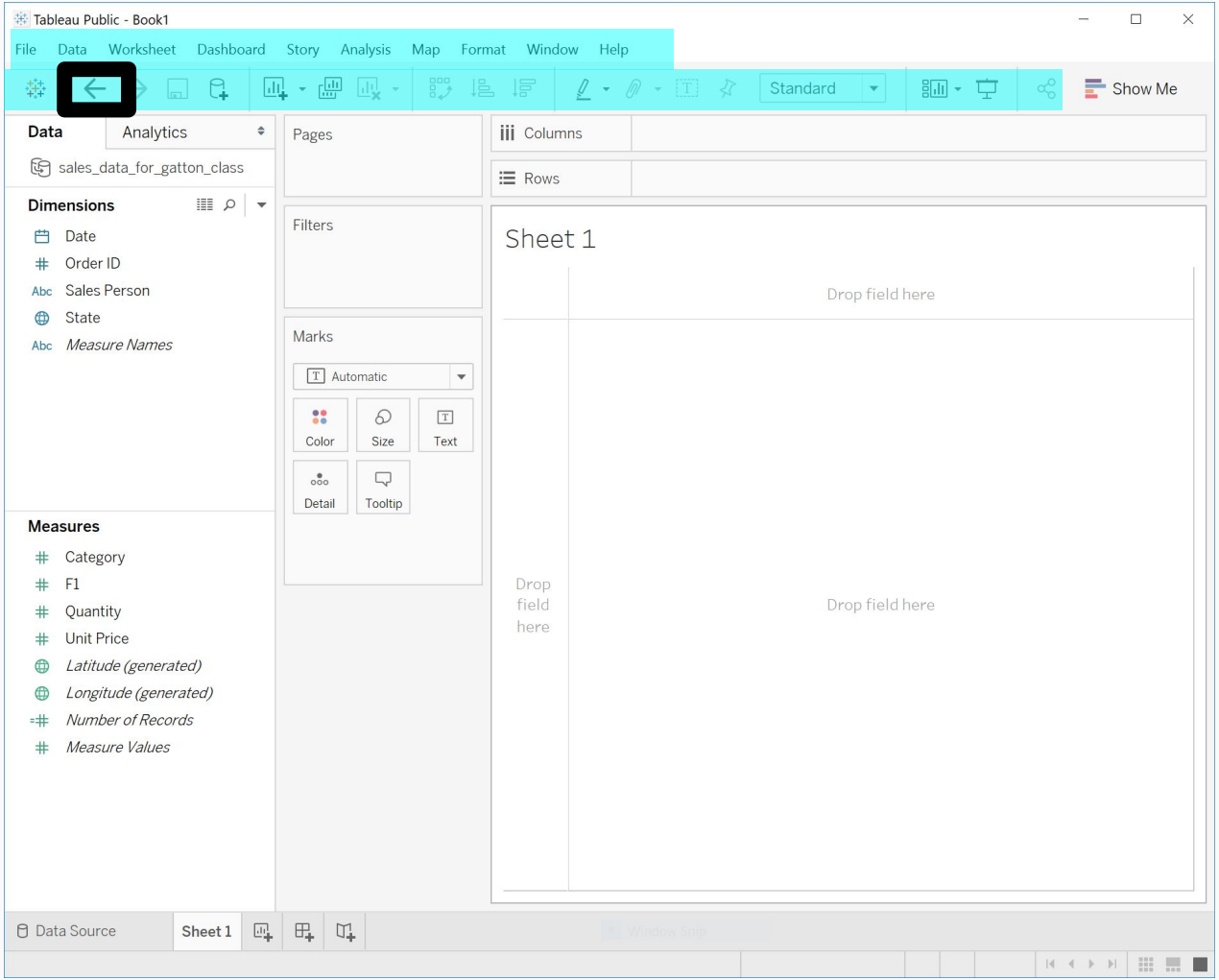
Marks Card
-Legend

Pills

Viz Type Selector

Viz

Tabs / Worksheets



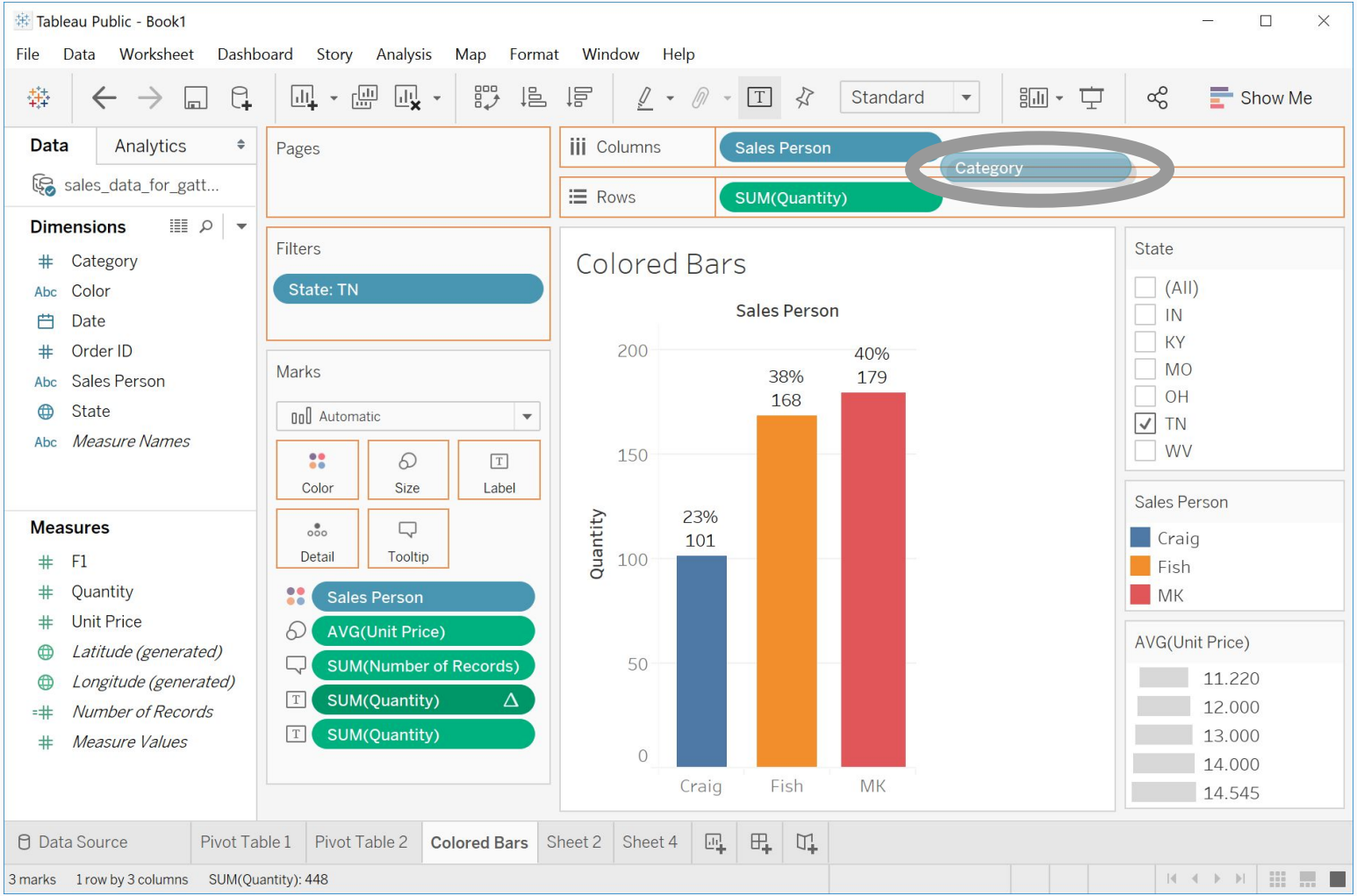
Menus

Lots of options to manipulate data, customize formatting, print, save, etc.

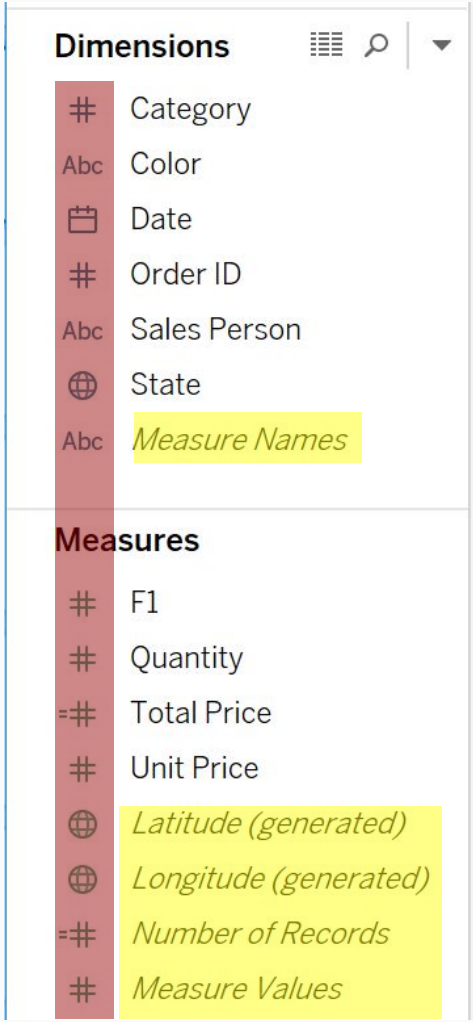
Quick-Options

Quickly select common options.

UNDO is the most important!!!!!



Create visualizations by moving pills to different shelves, using the **Drag and Drop Interface**.



Data Fields

All the fields available in the data.

Split into two categories:

- **Dimensions**
  - Factors to split the data by
  - Usually strings, etc.
- **Measures**
  - Values to aggregate
  - Usually numeric

Data Types

- Data types are indicated by symbols to the left
  - # : Numeric
  - Abc : String
  - Calendar : Date
  - Globe : Geographic
  - = : Calculated Field
- Defaults can be easily changed
  - R-Click for options

Automatically Generated Fields

These are created by Tableau

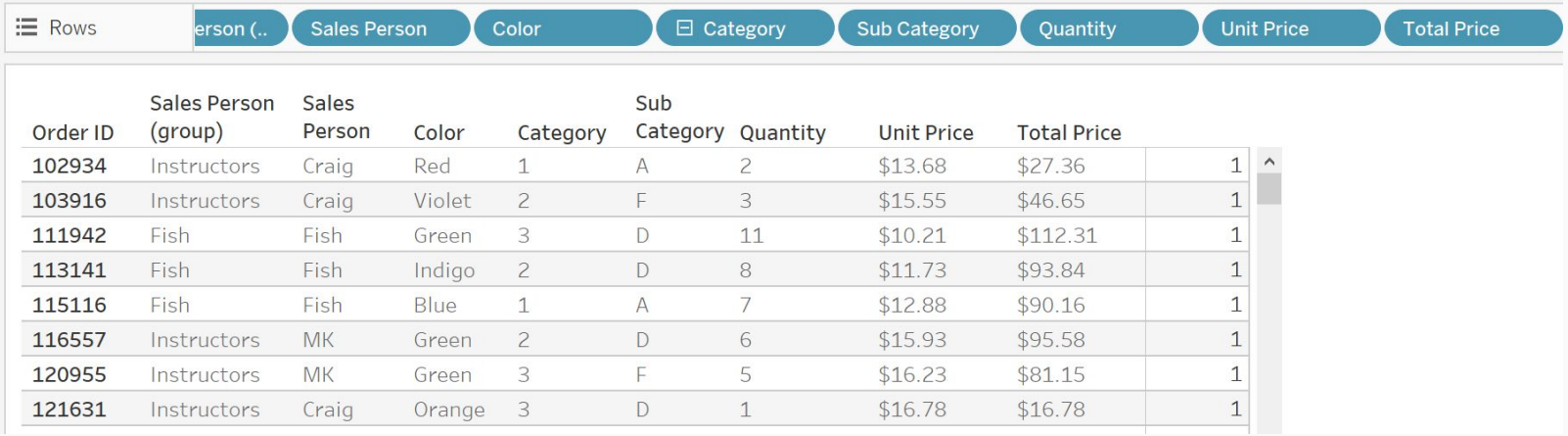
Number of Records is used to count rows (very useful!)

Measure Names & *Measure Values* are used in complex viz's with multiple measures.

Latitude and *Longitude* are used for maps.

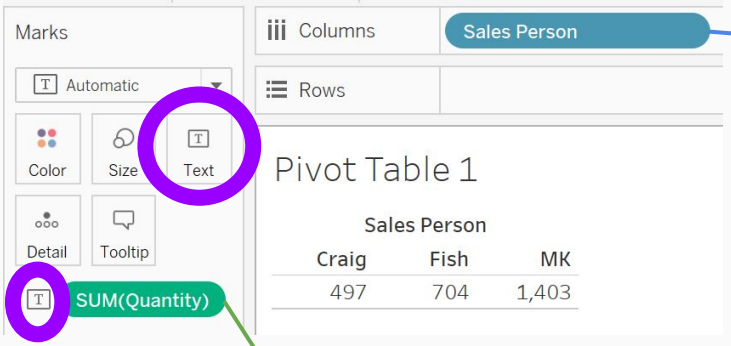
Spreadsheet-Style Reports

- Move lots of dimensions onto the Rows Shelf.
  - Measures should be converted to Dimension, Discrete (R-Click on Pill)
- By default, Tableau only allows 6 Dimensions.
  - Menu > Analysis > Table Layout > Advanced



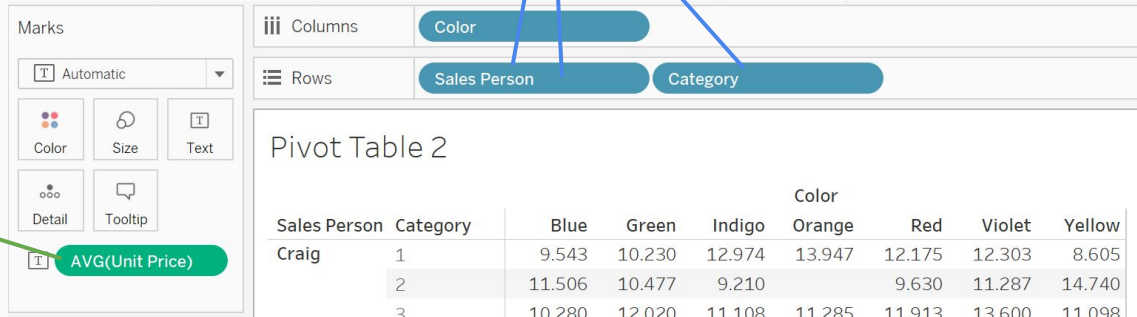
Order ID	Sales Person (group)	Sales Person	Color	Category	Sub Category	Quantity	Unit Price	Total Price	
102934	Instructors	Craig	Red	1	A	2	$13.68	$27.36	1
103916	Instructors	Craig	Violet	2	F	3	$15.55	$46.65	1
111942	Fish	Fish	Green	3	D	11	$10.21	$112.31	1
113141	Fish	Fish	Indigo	2	D	8	$11.73	$93.84	1
115116	Fish	Fish	Blue	1	A	7	$12.88	$90.16	1
116557	Instructors	MK	Green	2	D	6	$15.93	$95.58	1
120955	Instructors	MK	Green	3	F	5	$16.23	$81.15	1
121631	Instructors	Craig	Orange	3	D	1	$16.78	$16.78	1

Pivot Tables in Tableau



Split by Dimensions

- Rearrange dimension pills to change the groupings

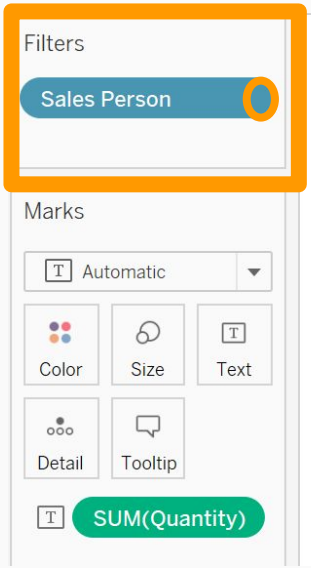


Aggregate Measures

- Put pill on the Text shelf
  - Pill has “T” icon to left
- Can change aggregation type with R-Click / Triangle-Click
  - E.g., Sum, Average

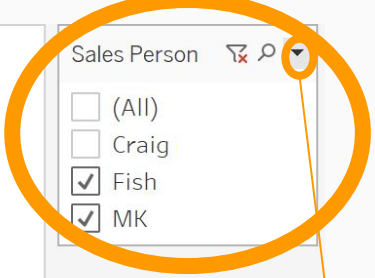
Pivot Table 2

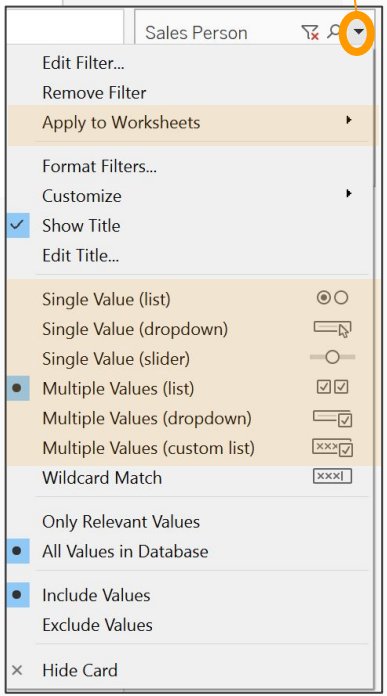
Sales Person	Category	Color: Blue	Green	Indigo	Orange	Red	Violet	Yellow
Craig	1	9.543	10.230	12.974	13.947	12.175	12.303	8.605
	2	11.506	10.477	9.210		9.630	11.287	14.740
	3	10.280	12.020	11.108	11.285	11.913	13.600	11.098
	4	10.075	11.765	12.842	11.125	12.573	13.310	11.353
Fish	1	14.918	14.556	12.360	12.740	15.177	16.205	12.177
	2	18.330	13.797	14.550	13.165	14.335	12.738	15.630
	3	13.508	13.258	12.923	14.192	14.145	12.778	13.314
	4	13.578	13.760	14.230	15.040	14.390	13.930	13.958
MK	1	14.404	14.985	12.817	14.626	15.183	14.256	15.259
	2	15.499	14.286	14.754	13.901	15.623	15.648	16.353
	3	16.881	14.539	14.557	14.745	14.455	15.401	15.884
	4	15.206	14.220	15.568	15.468	13.613	15.748	16.027



Sheet 1

	Sales Person	
Color	Fish	MK
Blue	88	218
Green	109	220
Indigo	101	198
Orange	113	205
Red	84	148
Violet	80	234
Yellow	129	180





Filter

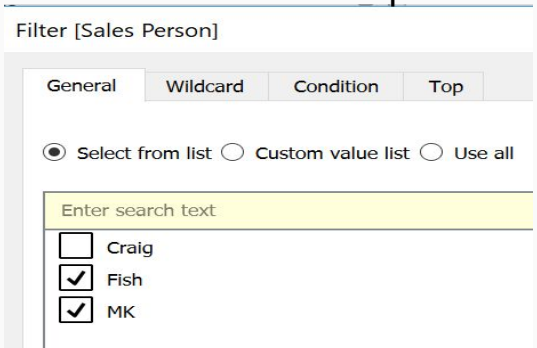
- Drag Pills to Filters Shelf
- Filters all data on the worksheet
- Field does NOT need to be used elsewhere in the viz

Interactive Filter

R-Click > Show Filter

R-Click > Edit Filter

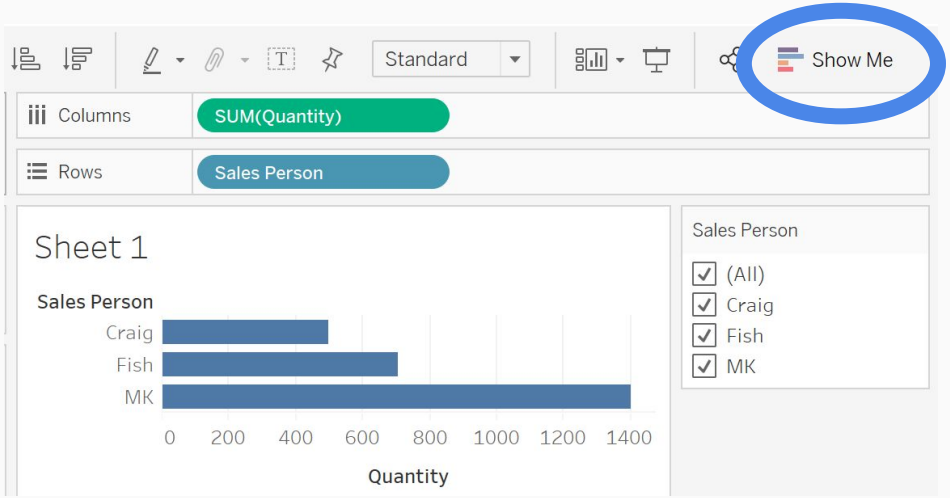
Select values to keep.

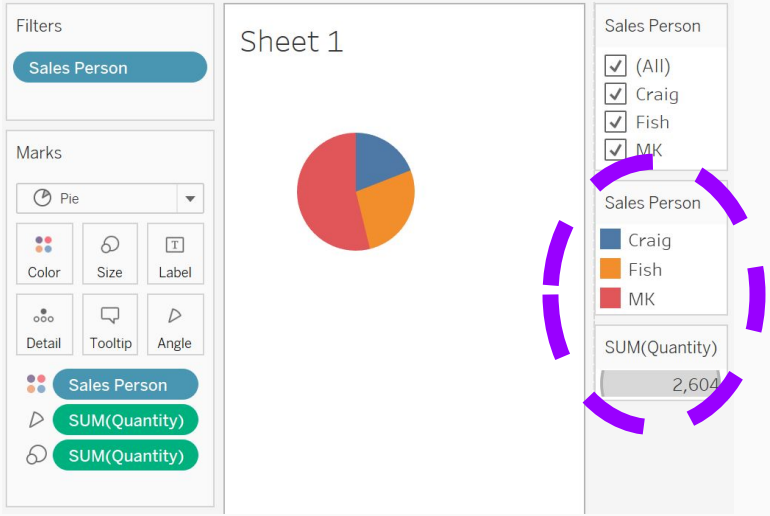


Triangle-Click the Filter for lots of options.

Particularly useful options:

- Filter Type
  - Single vs Multiple Value
  - (list) vs (dropdown)
- Apply filter to multiple worksheets
  - Particularly “All using this data source”





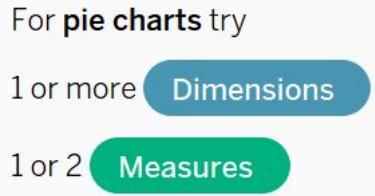
Use **Show Me** to easily change between visualization types.

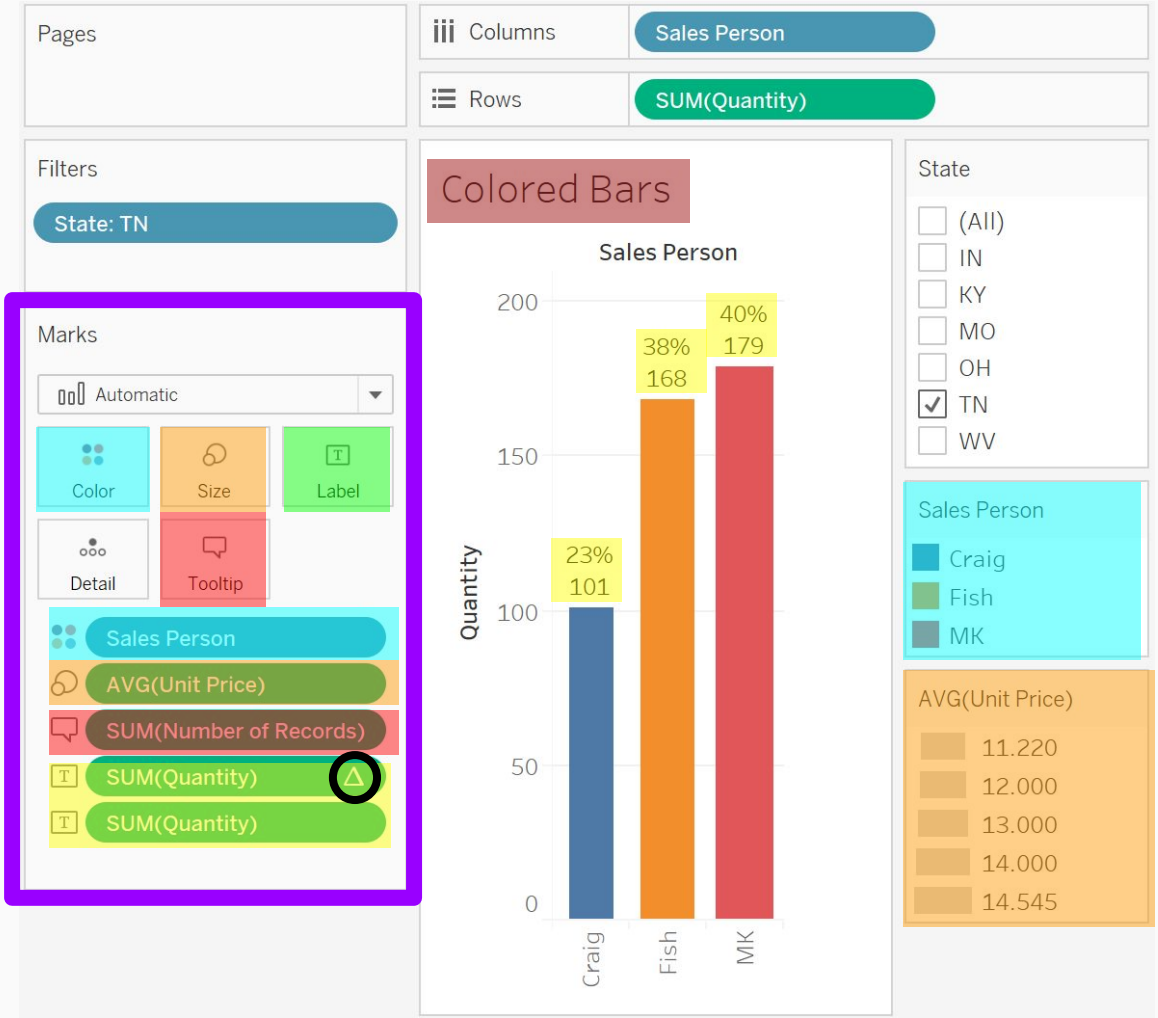
Will Automatically move Pills to different Shelves

- Rearrange the Pills to change the Viz layout.

Adds color, size, etc. **Legends** to viz.

Look for Dimensions and Measures requirements at bottom of Show Me menu





Use the **Marks Card** to add details to the Viz.

Color

Size

Tooltip

- Rollover text

Title

- Defaults to Tab name
- R-Click > Edit Title to edit

Label

- Percent of total
  - Triangle icon
  - R-Click > Quick Table Calculation > Percent of Total
- Format Numbers
  - R-click > Format -- Pane > Default > Numbers > Percentage

Publish to Tableau Public web server

Menu > File > Save to Tableau Public

Creates a unique URL to workbook.

- Options to make it downloadable, viewable by others, etc.
- Uncheck the box Allow workbook and its data to be downloaded by others
- Check ‘Show Workbook Sheets as Tabs’