



On-Demand Training: Authoring for Interactivity Transcript

Welcome to the Tableau Authoring for Interactivity Training Video. Today we'll be discussing the different ways we can build in interactive elements to our Tableau visualizations, to really drive those insights and help us and others in our organization to really see and understand our data.

So, for example, I have a quick filter here that allows me to drill into this dashboard that I've created by various product categories. So, you can imagine if this were a static dashboard, I would only see one specific distribution across the US for my profits, as well as one specific scatter plot for my customers and sales history. But, with this quick filter, I can now drill into this in a variety of ways and see how that relationship changes when I look at just office supplies, or perhaps just technology.

Going back to just furniture, we can see that there are quite a few states really struggling from profit standpoint, that we may not have noticed if we were simply looking at a one-page static dashboard viewing all of the data at once. Furthermore, I can drill into this by maybe selecting a specific state and seeing just the distribution for that state, beyond just the product category I want to look at. These are just small examples of how we can really build in powerful interactivity to our Tableau dashboards when we share them out across our respective organizations.

So let's jump into Tableau desktop and illustrate just how we can build in some of this interactivity. And starting off here, with just a simple map that shows my profit and sales across the United States for every city that I have sales in. Now, perhaps I'd like to view this, maybe, region by region. So we can go over and find our Region field and if we right-click on any one of these dimensions or measures, we can actually create that quick filter that we were showing in the view on Tableau Server.

Now that I have that quick filter, I can customize this to drill into it in different ways. So, perhaps I want to be able to select multiple regions at once. And I can leave it on this multi-value list. Or, if I come here to the top right, I can drop down a list of options to change this, perhaps to only view one, single region at a time, where you see I have quite a few other options, as well. This slider option, that allows me to sweep across the different regions, the multi-values list that we started with, and now a multi-values drop-down list, so that it hides those long lists and then I can pull that up and select the specific items, one at a time. And a few other options as well, including a custom value list and a wild card match. Both these allow us to type in specific values. We go ahead and leave this at the single-value slider list just to save some real estate.

So another great thing is I'm not limited to just one quick filter. So, beyond just drilling into a specific region, perhaps I want to drill into a specific state. So, we can find our state field and add that as a quick filter, as well. We see here, if I choose a specific region, the list changes to only show the states within that region. And that's the default that this Show More Values is selected to only show me the relevant values, when I have any two quick filters that have that relationship hierarchy of a parent and child as is with the region and state. So when I choose the higher level category, I get just the relevant lower level detailed state information for that specific region, which can be very useful, not only when we're looking to save screen real estate, but just to make it more intuitive to those users we're sharing this content out with, so that they can focus just on the information that matters. So, if I added another one as well, perhaps city, I would get that same relevant values feature to only show me the cities within that state that I select. So, if I were to choose just Alabama, and choose City, now I have just those cities. So I would illustrate how we build in quick filters into Tableau. As you can see, it's very quick, very easy and very powerful.

Now, this becomes especially useful when we're bringing these sheets together onto one page, specifically a

dashboard. So, let's go ahead and do that. I have a few other sheets built out, as well, to add into the dashboard. Just a simple time series chart and a scatter plot as well. Let's go ahead and jump to that dashboard and bring these sheets together onto one page. We can use our quick filters sheet that we created and bring in not just the map, but all those quick filters, as well. Bring, say, that time chart. Also, maybe, that scatter plot.

Now, if I wanted to add more quick filters onto this page, without going back to the source sheet and doing that, and simply come to the top right of any of these individual sheets and choose the quick filters option to add in quick filters, right from the dashboard. So, another way to build that in on the fly. Now, once I'm on this dashboard, the quick filters associated with that sheet that we built for the map, have automatically come out onto the dashboard, as well. And I can see that as I interact with them, getting the same interactions that I had on just the one sheet.

But, perhaps I would like this quick filter to work, not just on the map, but across all of these sheets and see the time chart and scatter plot change, as well, or maybe just one of those specific sheets in addition to the map. I can do that by coming up here and choosing to apply this quick filter to worksheets. I can choose an option all the worksheets, using this data source, which works similar to the Make Global feature that we had in our last version. We see this globally across the data source. But, new in Version 8, I can actually apply this to specific worksheets. So, if I want to choose, perhaps, just the time chart, I can do that. So, now I have the time series chart changing, as I sweep into different regions, but the scatter plot stays the same. And we could add that in to all these other quick filters, as well. So, just an example of how you build in and adapt that interactive quick filter on a dashboard.

Now, moving on to one more example of how we can build in interactivity into the content we create within Tableau, I going to actually jump to another dashboard. Here, I have a simple map displaying my profits across the US, as well as a URL web page that I'm displaying within the dashboard. I've just added that, by dropping in this web page, here. We can see that, as I select a specific state, the web page actually dynamically changes to reflect the Wikipedia page for just that state. Now to do this, we did something called an action that we added into the dashboard.

Now, we'll go ahead and rebuild this just to illustrate how that is done and the different ways we can add in those actions into a dashboard. Now, I've just created this simple map, here, to use as a guide for that web page I'm choosing to interact with. But, when I want to add in an action to a dashboard, first I would just need the sheet I'm looking for, and if this were a web page, I can add in that, as well. And here's where we could add in static URL. So, this isn't going to matter much right now, but I'll go ahead and just borrow the Wikipedia page for one of those states. I can paste that in and choose just that. Now, if I wanted to make this interactive, like you saw, where I can drill into specific states and see that web page change, I just need to add a simple action. To do that, we come over to the dashboard drop-down and choose Actions, and we can add an action.

And here's where actions automatically get added when we choose to add in different things like filtering and highlighting. We can edit those, here. So, just to quickly illustrate that, if I step out of this for a moment, and jump back to the previous dashboard, I can actually add in interactivity on this map, itself, by making it a filter. So, now when I choose a specific area of California, the other sheets filter, as well. If we check those actions, a filter action is automatically generated. And this would just be the other way we could add that, step by step. That's actually what we're going to do with this URL action.

So, if we jump back to that dashboard, we'll go up and create that action. I'm going to add in this URL action. And here, we have a variety of different options. So the first is naming this, for this case I'm just going to choose Wiki Page for the action. I can choose to make this action run on a hover, so when I hover over a particular state, a menu, so when you quick filter... I'm sorry, the tooltip menu, when I hover over a specific state, I can have a link to select the hyperlink there. Or I just choose based on when I select a specific state. So, I am going to do that, in this case. And then I can add in that URL we were using, and it will leverage the web part that has already been embedded on the page.

But, I'm actually going to delete this last portion of the URL. So, as we jump back to the web site for a moment, you can see that on Wikipedia's web site, the ending part of the URL demonstrates exactly which page to go to. So, perhaps, if I choose Oregon, I will go just to the Wikipedia page for Oregon. Now, we have that information actually in our data. That's the state information. So, when I click on a specific state, it'll populate the end of that URL for me. And that's where we get that dynamic interaction between the sheet and the web page. So I can add in that state field, into the end of that URL, and now we will see I have created that action, and I can choose state by state and see the different web pages interacting with my Tableau visualization.

So, just a few powerful ways we can build in those quick filters and actions into our Tableau visualizations and really create that powerful interactivity within the dashboards we're sharing out across our organization.

Thank you for attending this training and please do check out the other trainings, as well.