Free Training Transcript: Dashboard Extensions

Welcome to this video on Dashboard Extensions. You can download the Exercise workbook to follow along in your own copy of Tableau.

Dashboard Extensions add custom capabilities directly into Tableau workbooks. Extensions are built by Tableau and partners using the Extensions API. Finished extensions that can be used in workbooks can be found in the [Extensions Gallery](#).

Once we've identified the extension we want to use, we need to download the extension file (.trex) and save it locally. The recommended location it the Extensions folder in the My Tableau Repository. I've downloaded the Data Driven Parameters extension.

Using Dashboard Extensions

Let's add the Data Driven Parameters extension.

In this workbook, we have a dashboard that shows employee's favorite restaurants. We have a parameter that lets us select employees and visually indicate their chosen restaurant. As we hire new people and add their information to the data set, we want the parameter to update so they can be represented on the dashboard. Note that there is currently no employee number 8.

Here we have our Dashboard built out with the map already on it. Note that Extensions can only understand content on the dashboard—so we need to make sure we have the relevant sheets in use on the dashboard before we try to add and configure the extension.

To use the extension, first we'll bring out the Extension object to the dashboard. I'll make it float. We're prompted to choose an extension—we can visit the gallery, or navigate to a local, saved .trex file. Some extensions may require permissions—click Allow.

What we're prompted for with any given extension varies based on the extension itself. In this case, we're asked to configure the Data Driven parameter.

First, we can choose the appropriate parameter. Next, select the relevant worksheet, then the field in question. If we needed to change, we could simply use the dropdown, but here the defaults are correct. We can even change the background or text color if we choose, or start over.

I'll resize the new parameter, and get rid of the old one.

In the underlying data, we'll add a new employee. Save the data, and back in Tableau, we'll refresh the data. Now when we try 008 in the parameter, our map updates with that brand

new mark. We didn't need to manually add that employee to the parameter, the extension did it for us.

Working with Extensions

To modify an extension in use in a dashboard, simply click to bring up the arrow for the context menu. From here, we can go back to the configuration dialog, reset the permissions, learn more about the extension, etc.

Managing Extensions

As a Server or Site Admin, extensions can be managed for your Tableau site by going to the Settings tab choosing Extensions.

We can allow (or not) extensions to be run, as well as block or allow specific extensions and setting the default behavior for unknown extensions. For more information, check out the online help.

Developing Extensions with the API

If you're interested in making your own extensions, check out the API on Tableau's GitHub page.

Conclusion

Thank you for watching this training video on Dashboard Extensions. We invite you to continue with the Free Training videos to learn more about using Tableau.