



Free Training Transcript: Dashboard Interactivity using Actions

Welcome to this video on Dashboard Interactivity using Actions. You can download the Exercises workbook to follow along in your own copy of Tableau.

Actions

Dashboard actions are powerful, interactive elements within a dashboard. There are three types of actions: Highlight, Filter, or URL. Actions on dashboards have several parts. Highlight and Filter Actions have a source and target. URL actions can include field values as dynamic inputs. An action can be activated by various mouse behaviors, such as hovering or clicking, or as a menu option in the tooltip.

Highlight Actions

Highlighting calls attention to marks by dimming everything that isn't selected. It can be done in the view or from a legend. Let's add a highlight action to this dashboard. Most simply, this highlight pen icon turns on highlighting from the legend. Now clicking on a Category will highlight all marks for that category. But we can create a Highlight action with different behavior. Click on the Dashboard menu then Actions. We can see that generated highlight action from the legend, and we can add our own. Add Add Action > Highlight. First, we'll give it a name – "Market Highlight". For Source sheets, we can select a dashboard from the dropdown – it's already correct. We'll leave all sheets as source, so we can drive this action from any view. For Target sheets, we'll deselect Map – this means the map won't highlight. For Target Highlighting, we'll choose "selected fields" and check Market. We'll change the Run action to "Hover". The default is Select, which is a mouse click. Now, when we hover over any mark, all marks in the bottom charts that share the same market will be highlighted

Filter Actions

Interactive filters can be applied to all or some views using the related data sources, and views can be turned into filters by clicking on the icon in the header, but for more control, we can use formal filter actions. Dashboard menu > Actions, add Action > Filter. We'll name it "Filter to just this country". For Source Sheets, select only the Map. For Target Sheets, deselect the map but leave the other two. We'll leave target filters on all fields.

It's important to choose what clearing the selection will do – we'll pick Show all values – this is usually the expected behavior for the end user. This time, we'll leave the Run action as "Menu" and click OK. Now, when we click on a country on the map, we have the option in the tooltip to filter the bottom two views. Because we deselected the map as a target, the map doesn't filter itself. Note that our highlight actions still work.

URL action

URL actions create a hyperlink to a webpage or file outside of Tableau. Field values can be used as dynamic inputs in a URL so that the link is related to the data. Let's add a URL action.

Go to the Dashboard menu > Actions. Add Action > URL. Speaking of using fields as dynamic inputs, this can be done when naming actions as well – we'll name this URL Action "Wikipedia for", and then we'll click this arrow for a list of available fields, and we can pick City. For Source Sheets, we want the URL to run from the map, so we'll deselect NZ Sales. We'll leave the Run action as Menu. And the URL will be the selected city's Wikipedia page – earlier, I opened a page for a random city and copied the format of the link. And then add the city field as a dynamic input in the URL: depending on which city we select on the map, that name will be fed into the URL. We can test the link, here – note that it opens in our browser.

Now when we click on a city in the map, the tooltip offers the link "Wikipedia for" whatever the city is. The link in the tooltip is the name of the action – including that dynamic input. If we click on it – note that the URL action, instead of opening in the browser, opened in the web page at the bottom of the dashboard. If there is a web page on the dashboard, the URL action opens there. If there isn't a web page in the dashboard, the URL action will open in the default browser, like it did when we tested the link. The web page is still fully interactive – and if it ever lands on a page needing disambiguation, the user can interact with the page as if it were in a browser.

Conclusion

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