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Free Training Transcript: Interacting with Content on Tableau Server

Welcome to this video on Interacting with Content on Tableau Server. If you have access to Tableau Server, you can log in and follow along. Keep in mind that you will see your own content, not what's on my screen. To learn about navigating the interface, make sure you check out the previous video on getting started.

Drill Down and Actions

Here is a dashboard that has been published. We can interact with the information that's on this report, including using filters that the author has set up for us.

View Underlying Data

Now that we have an interesting view, there are a few things we can do. If we want to find out more about Stockholm, we might have permissions to view the full data, indicated by this icon here. This shows the individual transactions for this area of poor profitabilty.

Custom Views

We also can choose to create a custom view of the dashboard, essentially remembering these interactions , by clicking where it indicates that the view is the original. This way, we can come back to the specific configuration of this view, keeping an eye on this problem area. Let's name this "Stockholm Profitability Issue" and we can share our custom view by making it public, so others can see the insight that we have found as well. We can toggle between this view and the original view very easily, and it's easy to manage our views

Comments

We may have the ability to add comments, such as "We need to keep an eye on Stockholm next quarter".

Download & Export

Maybe we're the regional manager responsible for overseeing this area, and we really want to explore this profitability issue. If this "download" option appears (it's dependent on permissions), we can download a local copy to our machine and do some additional

analysis in Tableau Desktop. Alternatively, we can do some analysis directly in our browser by editing the dashboard. Check out the video on Web Authoring for more information.

Sharing

We can also email or embed a published dashboard using the links in the "Share" option. If we copy and paste this link into an email or embed it in a website, the person viewing or receiving it will be prompted for their credentials, to maintain security.

Subscriptions

We know this dashboard is updated frequently, and we want to stay on top of the changes. We can subscribe ourselves (or others) to this content by clicking the envelope icon (if it appears, it's dependent on permissions). This will give us regular emails of the content. The email will have a static image of the dashboard at that time, and a link to the live version. We can choose from different schedules, such as having the messages sent on weekday mornings.

Data Alerts

If there's a view that we want to have alert us if a specific threshold is passed, we can create an alert. Simply click on the numeric axis that's relevant to the threshold, then click the alert icon, and fill out the options for condition, threshold, email subject line – I'll put "Sales over 75k", select the frequency, and who to send it to. For more information, check out the video on Data Driven Alerts.

Favorites

Finally, if this content is something we want to be able to come back to easily and often, we can click this star to make it a favorite. All our favorites are in the menu at the upper right. Favorites can be any type of content, including data sources.

Conclusion

Thank you for watching the Interacting with Content training video. We invite you to continue with the free training videos to learn about other features in Tableau Server.