



Free Training Transcript:
Navigating the
Tableau Mobile App

Welcome to this Tableau Mobile video. Tableau Mobile is the fastest and easiest way to stay on top of your data anywhere. To follow along, you'll need access to a Tableau Online site or Tableau Server as well as the mobile app. Downloading the app is easy – Simply search the App Store or Google play for Tableau. Opening the app, we see the gallery of samples. To access our own content, we need to sign in. I'll enter my credentials.

Basic Navigation

At the top, we can see what site we're connected to – it's easy to switch between sites right here. We're on the Favorites tab – I don't have any favorites yet, we'll come back to that – but we can also easily navigate to Recents or All. Recent is exactly what it sounds like – it shows the last 12 pieces of content we accessed. Tapping All brings up all the content we have access to.

Favorites and Snapshots

If there are certain pieces of content we know we'll want to stay on top of often, we can add them to our favorites by tapping on this star here.

Favorites are powerful – not only are they all in one place for quick and easy access, favorites have snapshot capabilities for offline viewing. A snapshot is a high resolution image of the viz. They're stored securely and are available offline. We can see the last refresh time so we always know how up-to-date our data is. When we tap on a favorite, we can toggle between the image snapshot and the live interactive view. Now we can do things like change filters and get tooltips. Snapshots can be manually updated from the favorites tab by pulling down. For more information on working with snapshots, check out the online help.

Viewing Content

A quick word about content – by default, tabs show both workbooks AND individual sheets. We can identify what's a single sheet because the thumbnail is a box. A workbook has the stacked thumbnail. To change what type of content is displayed, tap Add Filter > Format and choose the desired type of content. Note that this selection IS carried across tabs.

Searching

It's important to be able to find the right data easily. Tap in the search box and start typing – the results are dynamic and update as we enter more of the search term.

We can also change how content is sorted by tapping on the option with the caret to the far right, here, to access the menu of sorting option. We can also toggle between a grid or list view of content.

Conclusion

Thank you for watching this video on the Tableau Mobile App. The next video contains information about interacting with content.

