



Free Training Transcript: The Tableau Interface

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

We're currently on a sheet. Sheets are where we can build visualizations. Let's go over some of the various areas of the screen.

Menus & Toolbar

At the top, we have the menus. The layout may look slightly different on a Mac. The menus contain a lot of powerful options, I recommend clicking through to see what options they contain.

Below is the toolbar, with buttons like save and undo – there's no automatic save in Tableau, so make sure to save your work periodically. Many of these buttons are contextual to what's going on in the sheet. For example, the clear sheet button is unavailable here, because there's nothing on the sheet. If we have a sheet that has data, the clear sheet button is no longer greyed out. And if we click on the dropdown, we see there are options to clear specific aspects.

The logo button here brings us back to the start experience, where we can access saved data sources, recently opened or pinned workbooks, etc.

Data Pane

To the left of the screen is the data pane. If we're on the data tab, the top lists all open data sources, and depending on which one is selected, the fields from that data source are listed below, broken out into dimensions and measures. The data pane will also show any sets or parameters we may have. If we open the map layers or the format pane, these temporarily cover the data pane. To get back to the underlying data pane, simply close whatever's on top of it. The data pane can also be minimized like so, and then re-expanded.

Down here at the bottom is the status bar. This shows the number of marks in the view as well as other summary information.

Analytics Pane

If we click to the Analytics tab, we can bring out pieces of our analysis directly as drag and drop elements. If they're not relevant to the type of view, certain elements will be greyed out, such as totals on a timeline. If we select something like a trend line, we can bring it to any of these drop areas to control aspects of its properties, like model type and which measure it should apply to.

Sheet Tabs

New sheet tabs are found here at the bottom. We can create sheets, dashboards, and stories with these tabs. We can do things like rename the sheets, duplicate sheets, copy formatting, and many other things. If the workbook has a lot of sheets, we can navigate easily with the controls in the bottom right corner.

Shelves and Cards

Finally, and perhaps most importantly, we have the shelves. A view can be built by dragging and dropping fields from the data pane into the canvas directly, or onto the shelves. Shelves are sometimes also referred to as cards. There's the Columns shelf and the Rows shelf up here, the Pages shelf, Filter shelf, and Marks Card. It's also possible to type directly into the Columns or Rows shelf if you know the field you want to use.

Marks Card

The Marks Card is made up of several other shelves, each of which can have fields placed on them and can be clicked on to edit their characteristics. Changing the mark type can change the shelves on the marks card, such as selecting shape brings up the shape shelf. Depending on the composition of the view, there can be multiple marks cards, one for each measure.

Legends

Legends, such as for color, size, and shape, will automatically be created when a field is placed on the color, size or shape shelf. However, legends can be removed by clicking on the menu, and selecting hide card. To bring a legend back, right click anywhere off the canvas itself, select Legend and choose the one you want.

Layout for Dashboards & Stories

If we're on a dashboard or story instead of a simple sheet, the layout changes a bit. Instead of the data pane on the left, we have the dashboard pane. The main area has a list of all the sheets available. There are also dashboard objects such as images and text boxes. There's also sizing options, and the device preview helps design dashboards for mobile devices.

Conclusion

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