



Free Training

Transcript: Tooltips

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

Tooltips are an often overlooked but very powerful part of Tableau. By default, the various fields used to create a viz are added to the tooltip. Hovering over a mark provides that underlying information. This is useful, but tooltips can be so much more.

Storytelling with tooltips

I like to make my tooltips tell more of a story. My usual way to format tooltips is to change the default to a sentence. For this viz, I'd describe it to someone as "in Q4 of 2012, Technology sales were this". So why doesn't the tooltip say that? Well, it can! We'll click on the tooltip shelf to edit, and start a new tooltip.

We can type "In" and then cut and paste the field, `QUARTER(Order date)`. Note that we have to take the angle brackets with the field name, that's what lets Tableau know this isn't the literal string Quarter-parentheses-order-date-parentheses, but rather the value (Q2, Q3) for that mark. And we'll paste it here we want it. We'll type of, and then bring up year. A comma, and another way to put a field in place is to use the insert menu—anything in use in the view can be added from here, and we'll add category. Sales were, and we'll insert Sum of sales. And we can delete all the default labels. We can preview and see, yep, that looks good!

I'll add a dollar sign in front of sum of sales—we could format the field itself to be currency, but sometimes this is easier. As we mouse around the view, we realize it's not always clear what to look at in the tooltip. Let's click the tooltip shelf again and select the `$<SUM(Sales)>`, and change it to size 12, and we'll use a more bold font. We can also add fields that aren't in the view by bringing them to the tooltip shelf. On the marks card, there's now a tooltip icon in front of SUM of Profit. And in the tooltip, we can add "for a profit of \$" and insert sum of profit. That looks pretty good.

Tooltip selection

Here, we have a bar chart that shows shipping cost by year and ship mode, and each year's bar is broken up into quarters. If we bring up the tooltip, and click to make it persist when we move the mouse, we can click on various pieces of the tooltip—wherever there are discrete fields we used to build the view. We can highlight all standard class

orders, all orders for Q2, or orders for a given year.

It might not be intuitive for my end users to know what they can click on, so I'll modify the tooltip add a comment at the bottom: "click an attribute to select other marks with the same value". If we don't want this functionality to be on, we can uncheck the box Allow selection by category.

Command Buttons

You may have noticed when I clicked to freeze the tooltip, we did not get the command buttons popping up. Usually, if we leave the mouse over the same mark for a moment, or click, the command buttons come up. These buttons let us act directly in the viz by keeping or excluding a specific mark or group of marks, creating groups or sets, or we can view the underlying data making up that mark.

Command buttons are useful in many situations, but we might not want the user of a viz to be able to access these features. To turn off the command buttons, click on the Tooltip shelf and uncheck "Include Command Buttons". We can also chose to not show tooltips at all, or to only show them if we hover over the mark for a moment.

Actions from tooltips

Now let's get a bit more technical.

This tooltip, when we click, has a link at the bottom. This is an action. Actions enhance the interactivity of a viz by highlighting, filtering, or opening URLs, depending on how they're created. Actions can be triggered directly in the view by hovering or clicking on a mark, or set to show up as links in the tooltip, like we see here. For more information on actions themselves, check out the video on Dashboard Interactivity with Actions. For now, just note that the text that shows in the tooltip for a menu action, like we have here, is set by the action, NOT in the tooltip editor—there's no link there. If we click this link, we're brought to an entirely new sheet.

Conditional tooltips

When the mouse moves over different bars here, watch the Order priority at the bottom. See how it changes to match the colors in the bar chart? How is that done? This isn't quite as straightforward as some of the other uses of tooltips, but it can be done fairly easily.

The key is to create a new field for each possible option that needs its own color; here, that's a field for critical, a field for high, etc. If we right click and edit, we can see how this was made. The calculation says, if the order priority field is low, then return the order priority, otherwise, and then just two double quotes with nothing inside them. This means that if the order priority is NOT low, the calculation will return nothing. The other 3 calculations are the same thing, just with other options here.

If we go to the tooltip, we can see that these four were inserted, like we did before, immediately after each other. Because only one order priority can be true for each order, the three that are false will show as nothing and only the true value will appear. Then it's simply a matter of coloring each field as desired. I used the More colors > pick screen color, to match the color legend.

Conclusion

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