



On-Demand Training: Efficiency Tips Transcript

Welcome to the Tableau Efficiency Tips Training Video. We're going to go over a series of tricks of how to save time and really be a quick and efficient user within the tool.

So let's go ahead and get started. Right off the bat, we can leverage a data source that has already been prepared for us. We'll use the Superstore Sales data set. Going forward, when you're looking to save and leverage data sources you have already prepared in potentially future workbooks, you can actually come up to the data source itself and right-click and in addition to publishing that to the data server, we can add it to our Saved Data Sources. So, going forward, when you have fields that are renamed and calculations that are added, you can leverage that in the future, without having to recreate that each time. So just one example, right off the bat, of how to save time in Tableau.

Let's go ahead and focus on, to start with, the different ways we can drag and drop to create the visuals within Tableau. So, obviously, there are the columns and rows shelf, that we're familiar with. But, beyond that, you see there are these other areas as well that we can drop fields onto the view and start creating visuals, right away. So, let's go ahead and do that. Then we grab our customers and drop them to create a nice list. And then, from here, we can take Sales and drop that in the only other pane to leverage on this view. And we've now created a simple bar chart showing sales for each of our customers.

So what happens if we want to take something else out onto the view? Maybe Profit. You can drag that onto the middle of the view here, and we see that we invoke the best visual practices from Show Me. And if we let go, Show Me will automatically place that field onto, in this case, the Color shelf, or in some other area on a different chart that it recommends are the best visual practices. So, we're viewing that additional field on the view that has already been created. So, in this case, the bars have already been sized to show that sales, so the next best way to visualize a changing measure would be to color the bars as well.

Let's step back and see the other areas we could have dragged Profit, to create a different visualization. We could have dragged it out here and created another axis, so that we show a series of small multiples. This might have been interesting if we wanted to create a scatter plot showing the profit and sales relationship for each customer. We could have taken the field and dragged it down to the bottom here and either just replaced the sales entirely, or possibly, a little to the left here, and we see that we could put a series of bars in front of the sales bars for each customer, or even drag it out the middle area here, down in the bottom, where we see the two rulers that would indicate two bars for each line item. So if we drop that, we now see that, a profit and sales bar for each customer.

Let's step back and see a few alternative ways. If we bring this all the way to the right, here, we see that we could actually have profit showing side-by-side to sales behind it. And if we needed to, we could even grab that field right there and drag it in front, to maybe show profit, and then sales. Let's step back a few more steps just to show one last way we could have brought profit out into the view. Perhaps we wanted to show a dual axis chart. We wanted to see, on the same view, profit and sales for each customer. That would be one way to do that.

Now, it's important to note that many of these ways can be achieved through alternative actions in Tableau. So, either invoking Show Me, dragging fields to the Columns and Rows shelf, it's also important to leverage, in a lot of situations, if you right-click on a field or area, a variety of options become available to you. So, when guiding through Tableau, always keep that in mind, that right-clicking opens up a host of options for whichever field or area you are making that selection on.

So, for example, I could right-click on the Sales field and see options to aggregate this differently and add a table calculation. I could right-click on the Customer field and see options to sort. Additionally, I could right-click on the Customer field on the view and see alternative options, as well. On the view itself, we can hover over different areas to perhaps leverage the one-click sort, and see ascending, descending, or even back to normal. So, right-clicking in different areas always yields some useful options to alter in the view in different ways.

We'll go ahead and create a new sheet here, then, and built out a different chart. Perhaps sales over time. We can right-click-drag one of these fields and put dates. This is especially useful because it prompts us with all the different ways we can display a date hierarchy. We can choose that monthly range over time. To show that, we could have done the same thing with the Sales field and if I right-click and drag that over the original one, it'll replace it, but this time, since I right-clicked and dragged, I'm prompted with options to aggregate that differently than the default aggregation of Sum. I could choose Average, Max, Standard Deviation. So, also a useful way to quickly change the aggregation on the view.

But, getting into some of those commands that I was alluding to, if I wanted to create an additional sales field in this view to show, maybe, the running total of sales over time, as opposed to just the changing aggregate sales, I can just hold my control key and actually come up to the Sales field and drag this to the right and it will duplicate that field for me. From here, I could maybe add a quick table calc to show that running total. And, just like that, I now have two different sales fields, side-by-side, one showing me the running total versus how sales have changed over time in the history of the business.

And maybe I take something like Region and place that on the Color shelf to view this, broken down by region. And if I don't like that, I could swap that on the color shelf to show category instead. We could drag this around to show different order for the legend, all through just a few drags and drops. So, very quick ways to create a chart like this in Tableau.

Let's go ahead and create an additional chart. Perhaps a quick tree map, one of the new visualization types in Version 8. So I'll take my state names and we'll look at profit, state-by-state. And, say, I want to color this by the different regions of the states. So, perhaps, grab my Region field and drag that onto the Color shelf. Now, if I wanted to color these additionally by state, you see, if we drag State onto the color shelf, we replace the region color entirely.

Now, if we step back for a moment, I could have actually held my shift key on the keyboard, and then dragged State onto the Color shelf and that is just one quick way to maintain that original color relationship between the regions and then, within that, color each of the states as well. So, just another quick command on my keyboard to be aware of.

Let's go ahead and jump to the end here, and create a simple dashboard. Just bring all these sheets together on one view. We can see here the different ways we can create a dashboard in Tableau by quickly just hovering over the different areas on the visualization and it is apparent to us how to set up that dashboard to our liking. So, once I have that created, I could quickly size these as well. And I can resize the dashboard itself here, to a variety of options. Maybe a Letter Landscape for printing, or even some alternative option as well. Perhaps a Laptop sizing.

And now, within this view, I see all the different color legends I have coming into play. So, previously, we were restricted to dragging these just within certain buckets, similar to how the sheets are dropped within Tableau. Now,

we can actually drag this as a floating object as well. So, I can hold my shift key and drag that color legend and perhaps place it on the view that makes more sense to see that. So, some of that white space I'm not using here, on this specific visualization it's effect, color legend matches up to that chart. Might be a nice way to display that. And I saved some space here, as well. So now, floating legends come into play, as well. And it probably doesn't make much sense to display this long list, so I can just get rid of that.

Beyond just dragging and dropping the sheets on the dashboard there are other quick ways I can go about creating things. We could have cleared this and just double-clicked Sheets and they will automatically be placed onto the view. So that is another option, as well. Once I have a sheet, I could right-click on that and remove it from the dashboard that way. Which is a variety of options to drag different sheet out on there and create the layout in Tableau.

So, between the different keyboard commands and all the dragging and dropping options we have available to us, and then also the right-clicking, there are very quick and efficient ways to go about creating different visuals and dashboards within Tableau. Something to keep in mind.

Thank you for watching the Efficiency Tips Training Video and please do check out the other ones, as well.