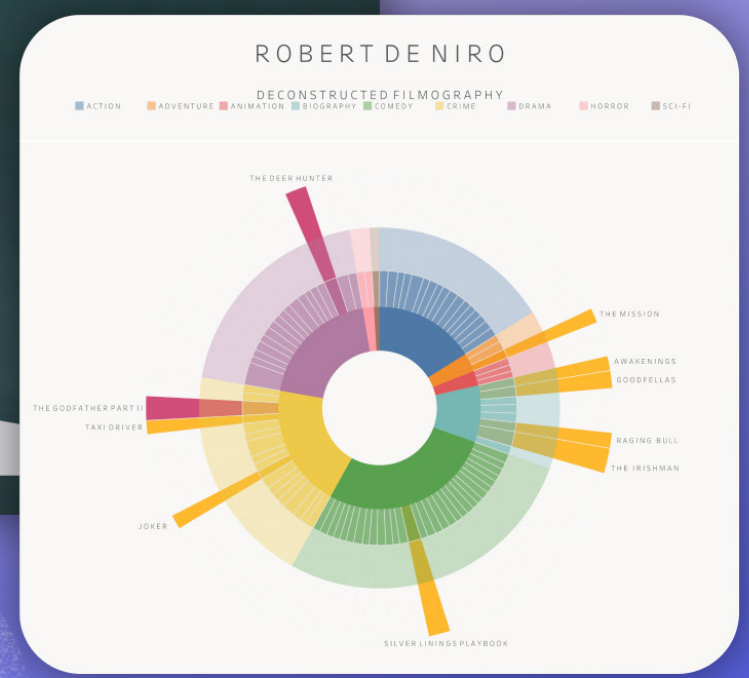
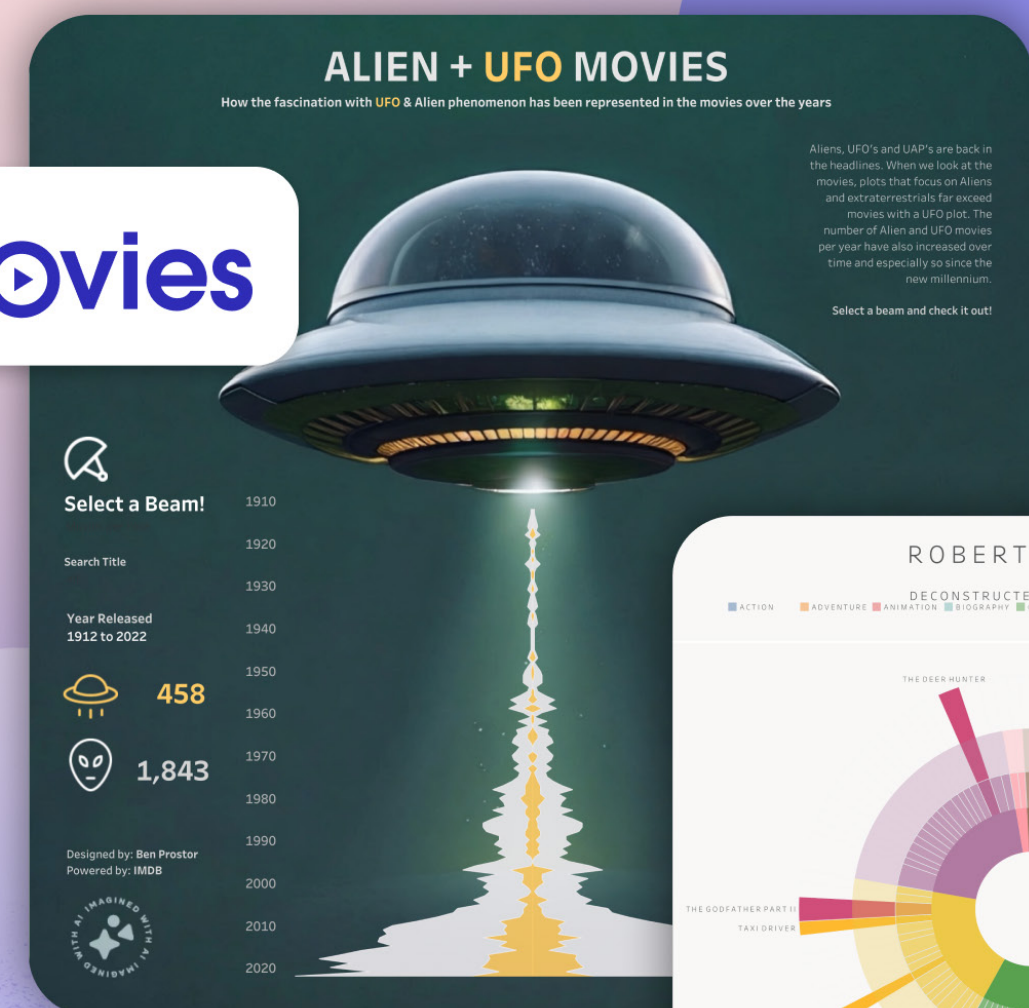


Tableau Quick Tips

Data + Movies Edition

By: April Doud, Senior Product Marketing Manager, Salesforce

data+movies



Introduction

Tableau is a powerful tool for creating stunning visuals and dashboards that bring your data to life. As we have seen throughout [Tableau Public](#) – a free online visual analytics platform that allows you to learn data skills and create your own portfolio of work—you can create almost anything under the sun. From interactive maps and charts to animated storyboards and infographics, Tableau offers endless possibilities for presenting data in a visually appealing and engaging way. Tableau’s easy-to-use interface and drag-and-drop exploration make it accessible to all levels of data analysts—from beginners to experts. Tableau has become a go-to tool for businesses, organizations, and individuals looking to effectively analyze and communicate their data. Whether you’re a data scientist, marketer, or educator, Tableau can improve how you use data and help you create better stories with it.

Let’s take a look at some quick tips and tricks for getting the most out of Tableau—including different ways to use images, formatting vizzes, and creating advanced chart types. We’ll cover 12 tips inspired by the [Data + Movies challenge](#), where enthusiasts authored data visualizations using a movie dataset from IMDb. Whether you’re a beginner or an experienced user, these tips will help you take your data analysis and visualization to the next level. So let’s dive in and unlock the full potential of Tableau.

We will use the [Data + Movies starter dashboard](#) to demonstrate all of these tips.

To play along, follow these steps:

1. Go to the starter dashboard.
2. Click on the Make a copy button at the top right of the page.
3. A new window opens: the editor window for Tableau Public vizzes and dashboards. You’ve made your copy of the dashboard and are ready to go!



Quick Tableau Tips

Category 1: Interactivity Tips

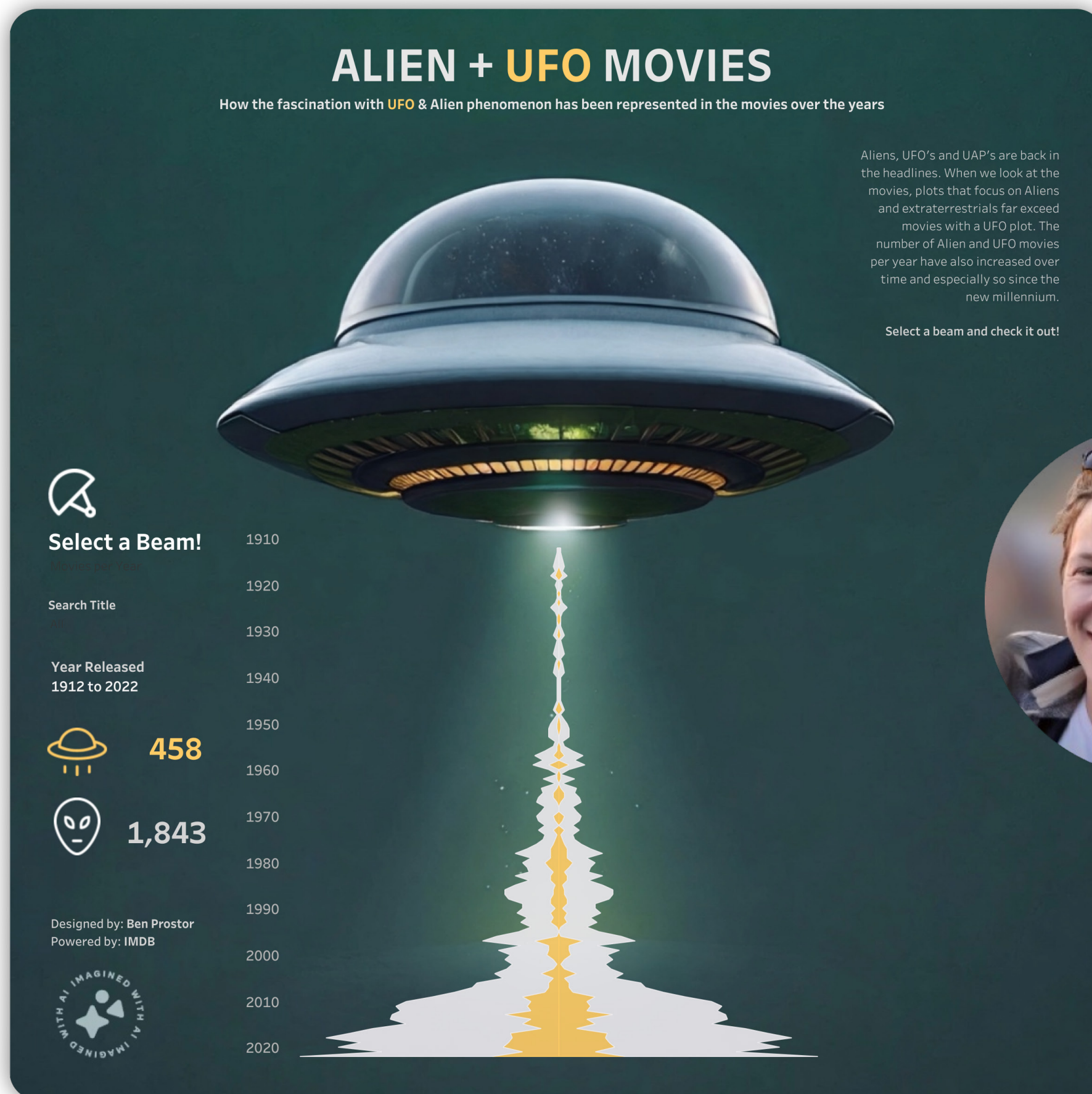
Interactivity is important in dashboard design because it encourages users to actively engage with the data and information presented. This can enhance the user experience and make the dashboard more effective in conveying insights and facilitating decision making. Interactivity can also help users customize the dashboard to their specific needs, making it more relevant and useful for their individual purposes. Additionally, interactive features such as filters, drill-down options, and hover tooltips can help your users explore the data in more depth and gain a deeper understanding of the underlying trends and patterns. Overall, interactivity can improve the usability, engagement, and effectiveness of a dashboard.

1. Custom shapes as buttons
2. Filter and highlight actions
3. Parameters galore
4. Click to change the view / Drill into the data / Expand hidden sheets



Custom shapes as buttons

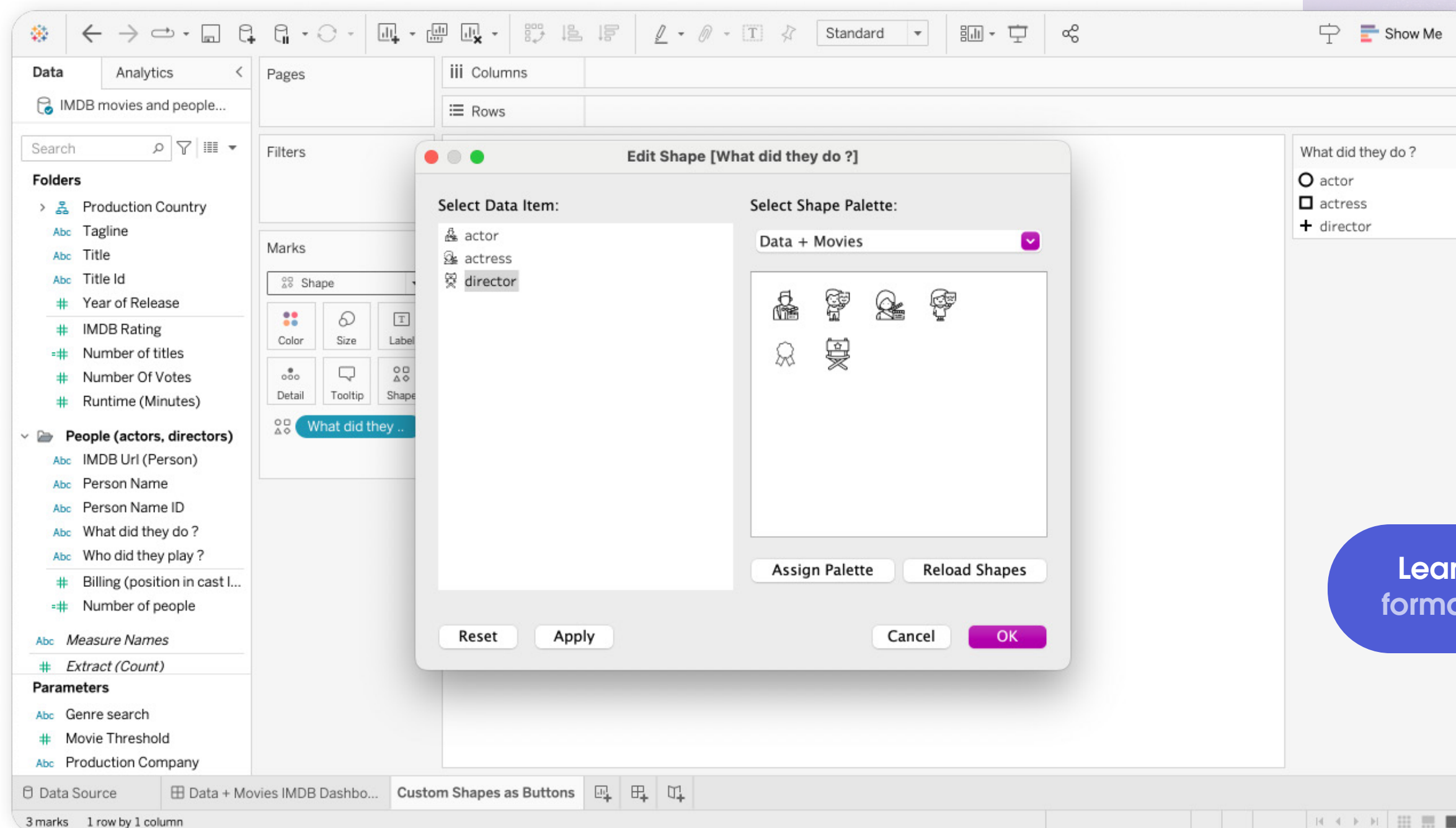
The Alien + UFO viz did this well with an alien and a spaceship to toggle the view. You can do this a few ways in Tableau; Ben Prostor created this effect using floating sheets over images so it is interactive on hover or click.



Ben Prostor He/Him
Senior Manager, Content Experience
Salesforce
Seattle, WA, United States
Tableau Public: [profile](#)
Data Viz: [Alien + UFO Movies](#)

Here's how to create buttons using custom shapes in Tableau Desktop:

1. In your Tableau Repository, go into your Shapes folder, add a new folder, and give it a helpful name.
Add your image files to the new folder. I like to use .png files with transparent backgrounds
2. On a clean sheet, change mark type to shape and put your filtering field on shape
3. Click on shape to open the dialog box, then click to Reload Shapes
4. Find your folder name in the dropdown and select it
5. Click on each data item, then on the image you want to assign it, then click ok

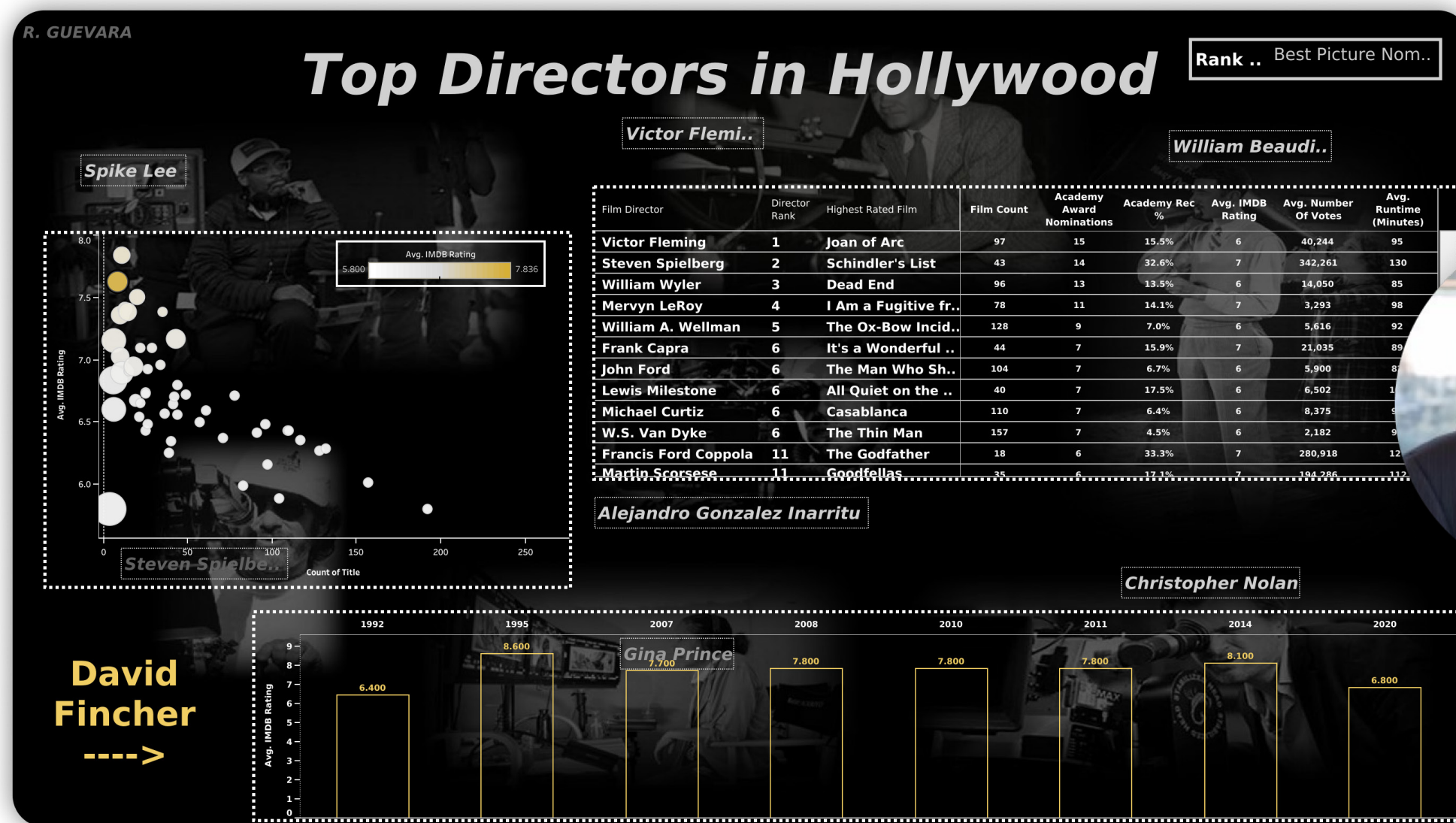


Learn more about size and formatting options of shapes.

6. Next, add the filter dimension to either rows or columns and hide the header
7. Put your desired measure on label and change the alignment and any text formatting
 - a. Tip: make sure your sheet view is set to Entire View
 - b. Adjust the size of your shapes
8. Add the sheet to a dashboard and adjust the Actions to filter and/or hover to change the view of the rest of the charts. For instructions on creating actions, jump to the next section

Filter and highlight actions

Filtering and highlighting is essential to the exploration of data. Creating interactivity through filter and highlight actions invites the viewer to explore more. Rafael Guevara Jr. uses filter and highlight actions to make it easy to see detail about each director.



Rafael Guevara Jr. He/Him
 MBA , Data Analytics
 Operations & Reporting Specialist |
 Visualization Enthusiast | Networker |
 Blogger
 Dallas, TX United States
 Tableau Public: [profile](#)
 Data Viz: [Top Directors in Hollywood](#)

How to create filter or highlight actions:

1. Open the Dashboard Actions menu (Dashboard > Actions)
2. Add Action
3. Select the action type
4. Give it a name so when you come back to your work, you know what the action does
5. Select what sheets you want to drive the action
6. Choose how to run the action. Select is the most common for filtering, hover works well for highlight only

Edit Filter Action

Name: Filter on <What did they do ?>

Source Sheets: Data + Movies IMDB Dashboard

Run action on:
 Hover
 Select
 Menu
 Single-select only

Target Sheets: Data + Movies IMDB Dashboard

Clearing the selection will:
 Keep filtered values
 Show all values
 Exclude all values

Filter: Selected fields

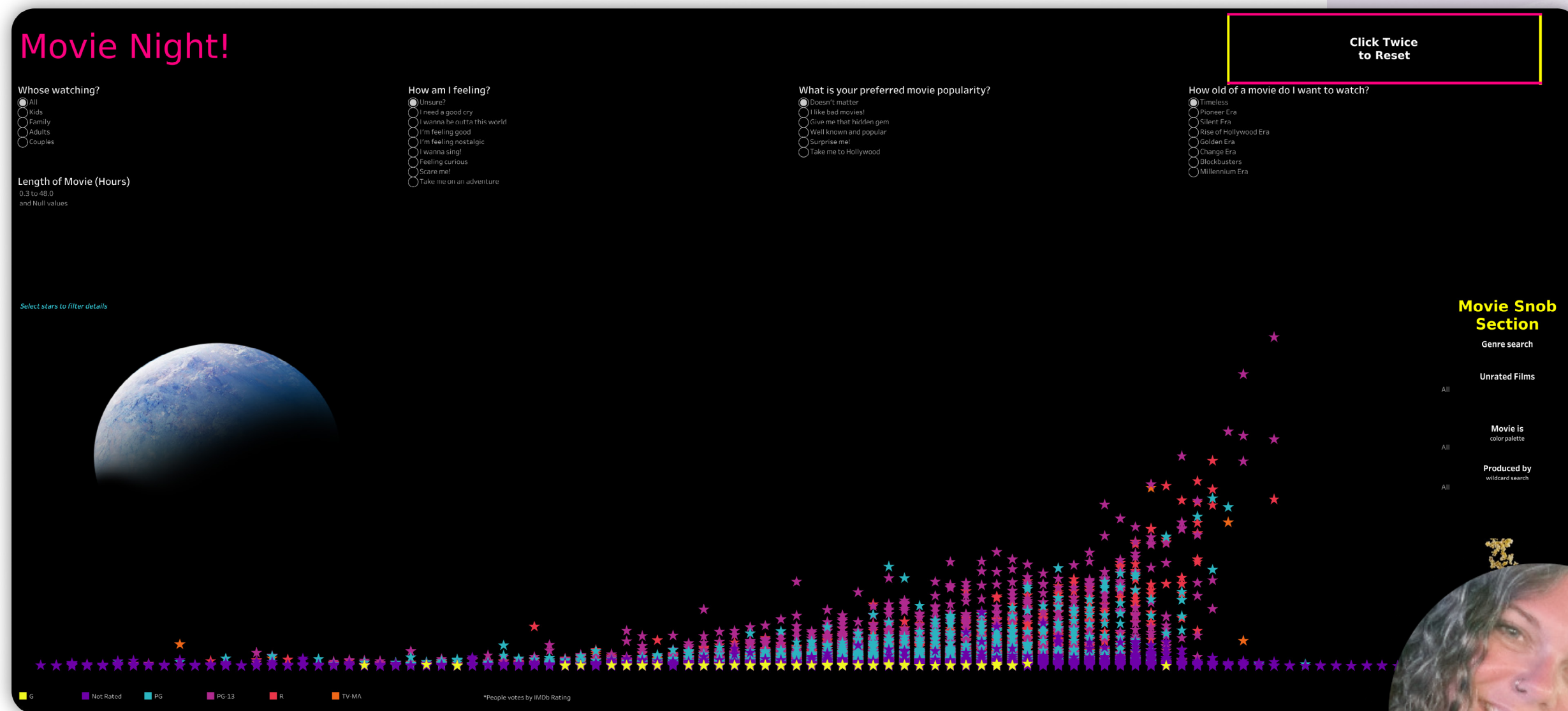
Source Field	Target Data Source	Target Field
What did they do ?	IMDB movies and people Extract	What did they do ?
Click to add		

Buttons: Remove, Cancel, OK

[Learn more about Actions](#)

7. Select the sheets you want to be filtered; this can be all if you want, or you can filter on some sheets and then create a highlight action to highlight other sheets
8. Choose the behavior of clearing your selection
9. At the bottom, you can choose what field(s) you want to filter on. There are many cases where you only want one dimension in your sheet to drive the filtering behavior; other times you want everything to filter. Choose what best fits your use case

Parameters galore



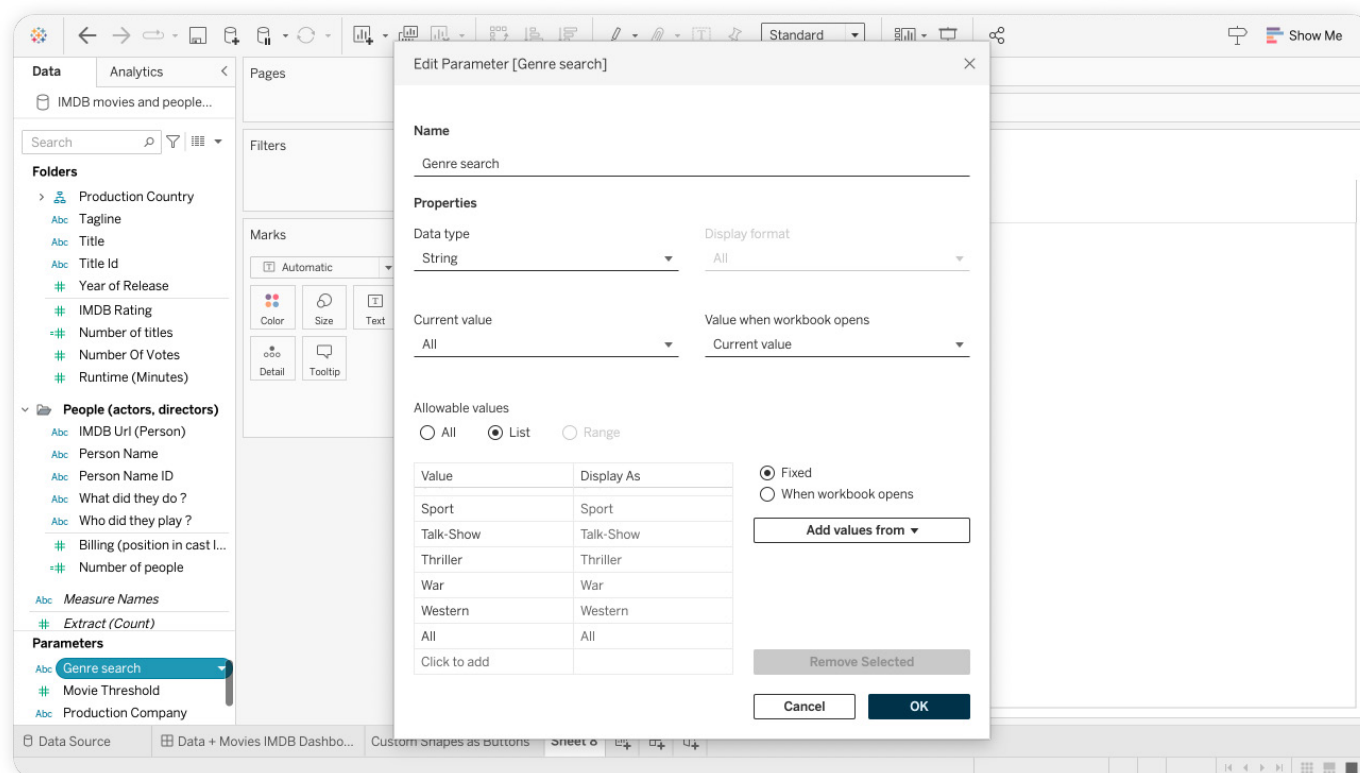
Parameters are one of my favorite features in Tableau. They allow me to do so many custom actions, formatting, and filtering. Bonita Marie Ysen pulled parameters into her dashboard to customize the filtering options. She used custom logic to help find movies based on feelings which were not in the dataset. There are two parts to incorporating parameters; one is the parameter, the second is the calculation that is driven by the parameter. We will focus on the parts you create first, then in the next tip apply some additional action.



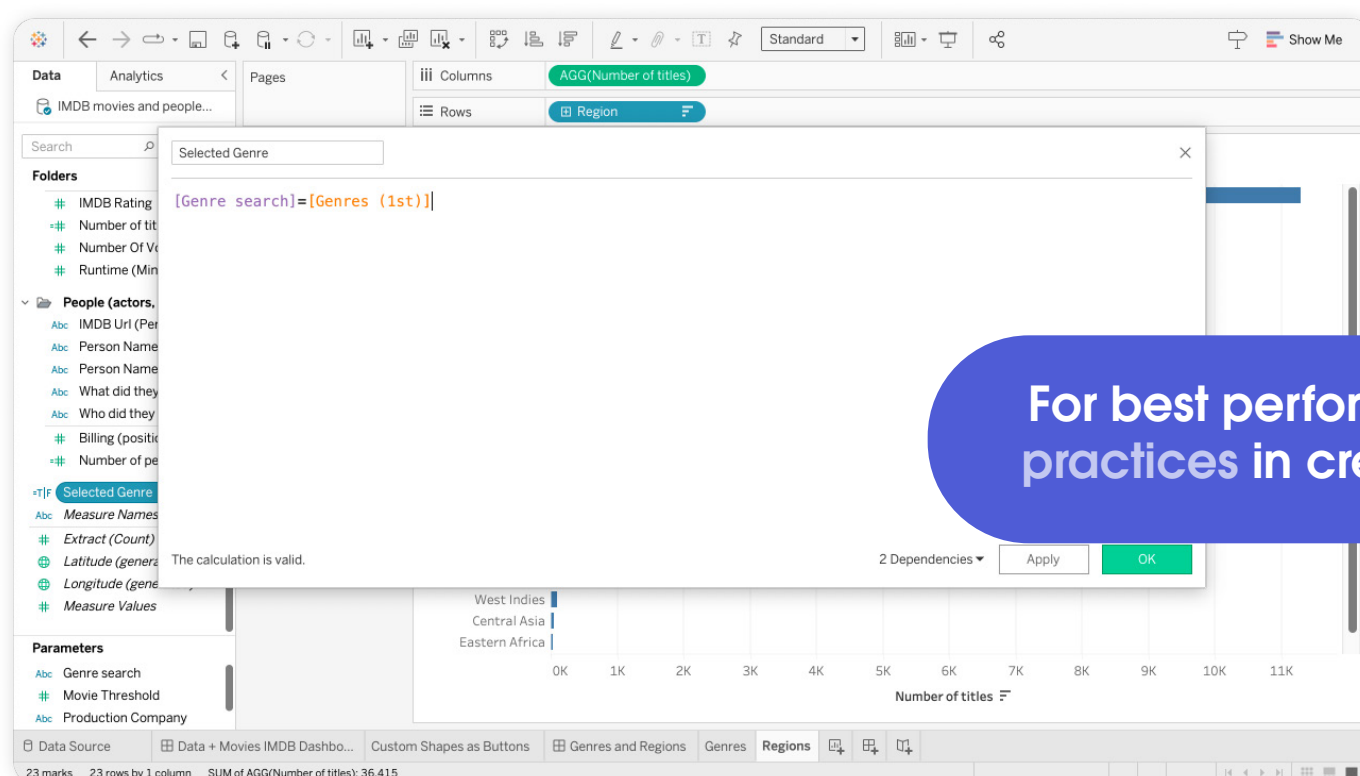
Bonita Marie Ysen She/Her
Tableau Developer and Data Lead,
908 Devices
Vermilion Bay, Ontario, Canada
Tableau Public: [profile](#)
Data Viz: [Movie Night Generator!](#)

Create a parameter and corresponding calculation:

1. Open the Create Parameter dialog
 - a. Right-click in the white space in the data pane and Create Parameter
 - b. Click the down arrow next to the search box in the data pane and Create Parameter
2. Give it a name
3. Choose a data type
4. Your parameter can be a custom list or based on a field in your data. For this example, we will choose to populate the list with our genres



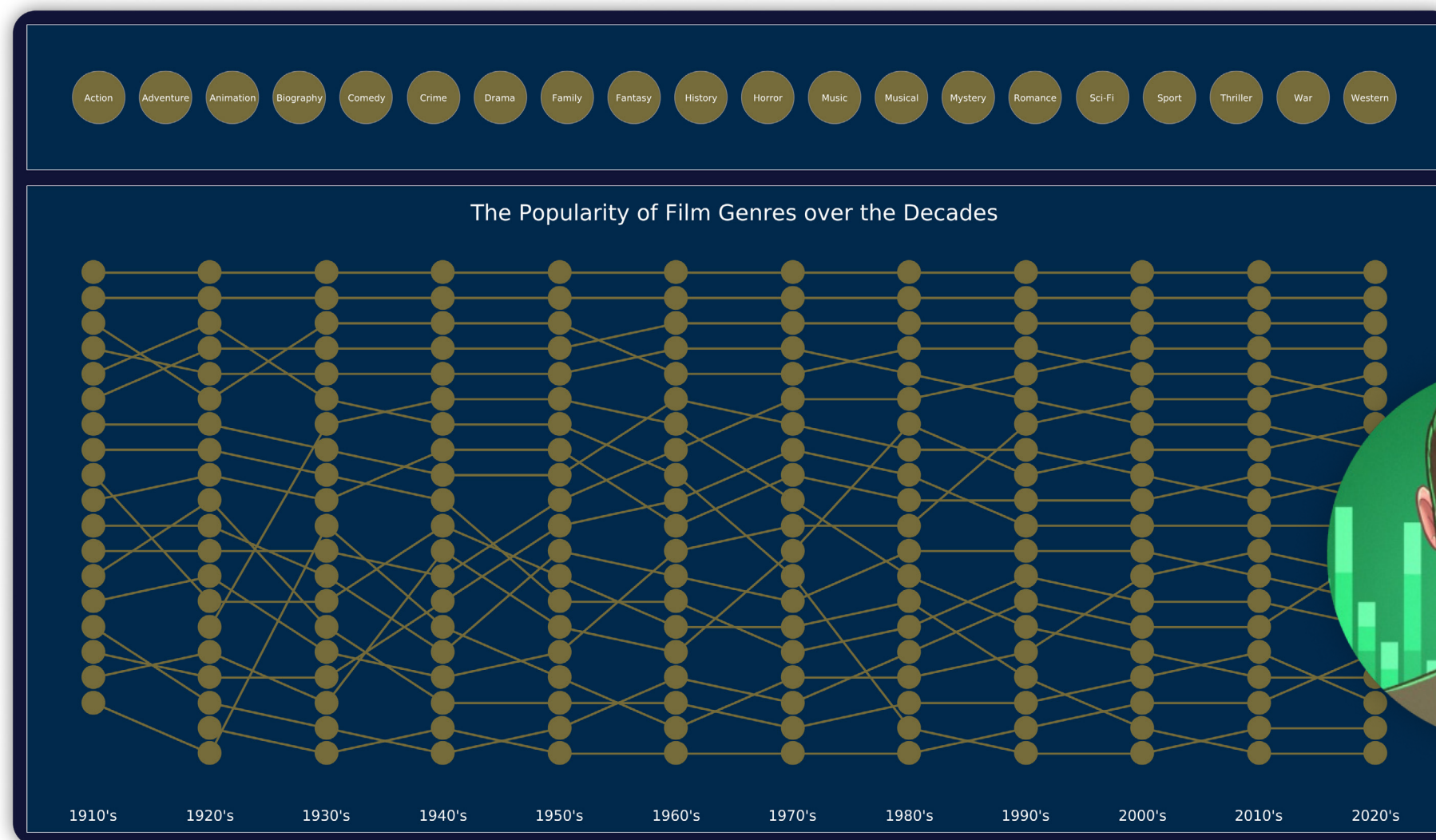
5. Create a new calculation, choosing the right calculation for the intended behavior
6. For now, we are going to create a basic calculation we can use in the next tip



For best performance, follow best practices in creating calculations.

Click to change the view/Drill into the data/Expand hidden sheets

Parameters and actions working together make some great interactivity. James Newton used actions plus sets to create the drill-in behavior for his dashboard, starting with a simple bump chart and then clicking in to expand more analysis for a single genre. This can also be accomplished using the parameter and calculation we just created.



James Newton He/Him
Senior Analytics Consultant, Biztory
Swindon, Wiltshire, United Kingdom
Tableau Public: [profile](#)
Data Viz: [The Popularity of Film Genres Over the Decades](#)

Showing and hiding sheets using a parameter:

1. Take the calculation we created in the previous tip and place that on filter, set to TRUE only
2. From your dashboard, create a new Dashboard Action
3. Add a Parameter Action
4. Select the sheet you want to drive the behavior
5. Keep on Select
6. Select the parameter

Learn more about Set Actions.

Learn more about Parameter Actions.

7. Choose the clearing behavior. If your use case has an ALL or a default value you want to revert to, input that
8. Select the data field that will be used to update the parameter and set aggregation needed
9. Click OK and test the behavior

Quick Tableau Tips

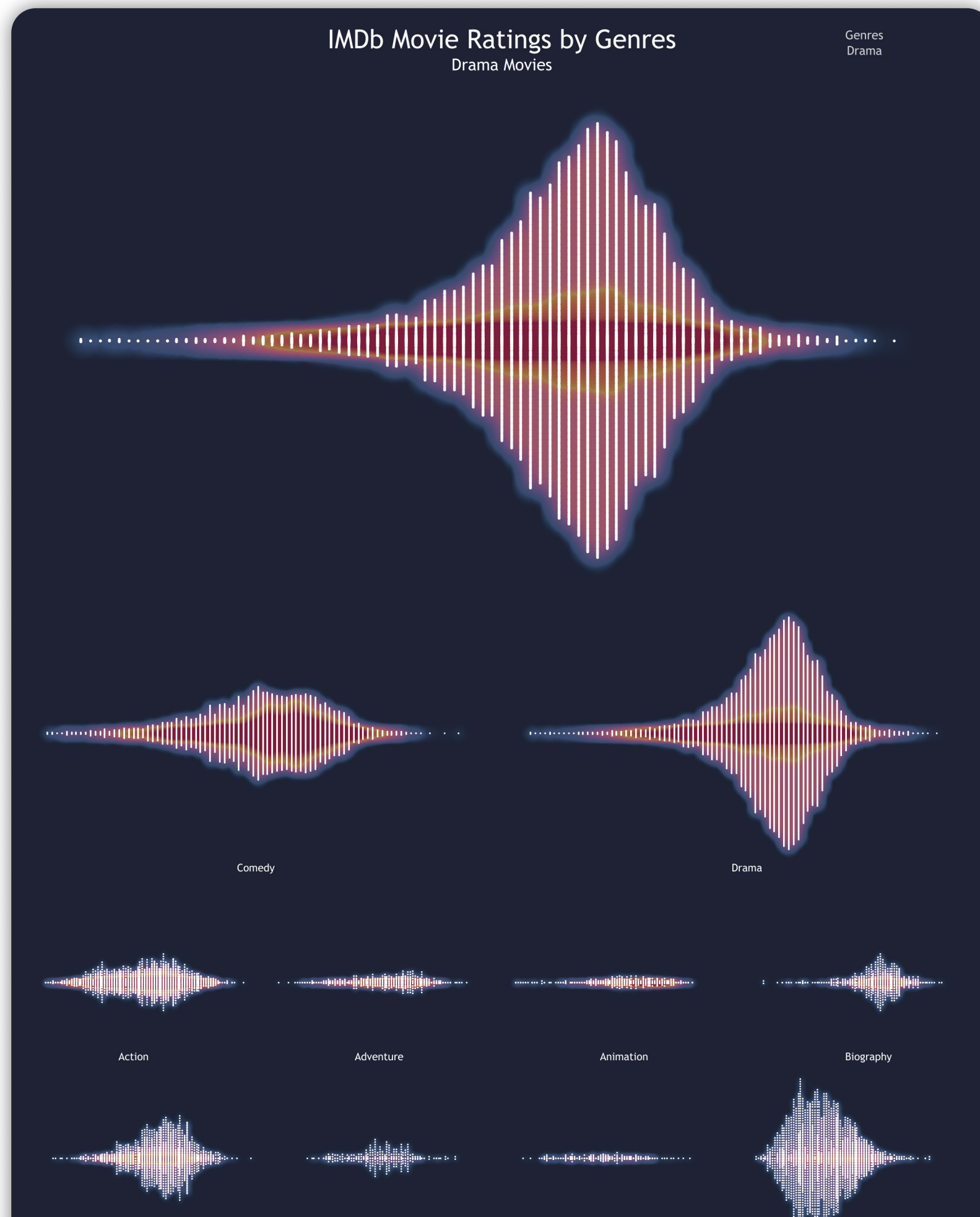
Category 2: Formatting

A visually appealing and user-friendly dashboard has many advantages: One, it looks cool and your audience will want to interact with it, which leads to happy users and more views. Two, you get to show the important stuff like key data or trends. Three, good dashboard formatting makes you look like a pro. We could go on and on about the importance of good formatting but let's show you how to do some cool formatting tricks instead.

1. Dynamic titles and captions
2. Custom shapes for thematic matching
3. Using titles as color legends
4. Using an image as a title

Dynamic titles and captions

While designing with simplicity in mind, we often hide labels so we can focus on the shape of the data. Jennifer Dawes does this in her dashboard, but she goes one step further by making her title dynamic. As you use the filter the title changes to reflect what is in the data.



Jennifer Dawes She/Her
Senior Consultant at Analytic Vizion
8x VOTD | Tableau Public Ambassador |
Co-Founder Her Data | herdata.net
Swindon, Wiltshire, United Kingdom
Tableau Public: [profile](#)
Data Viz: [Movie Ratings by Genres](#)

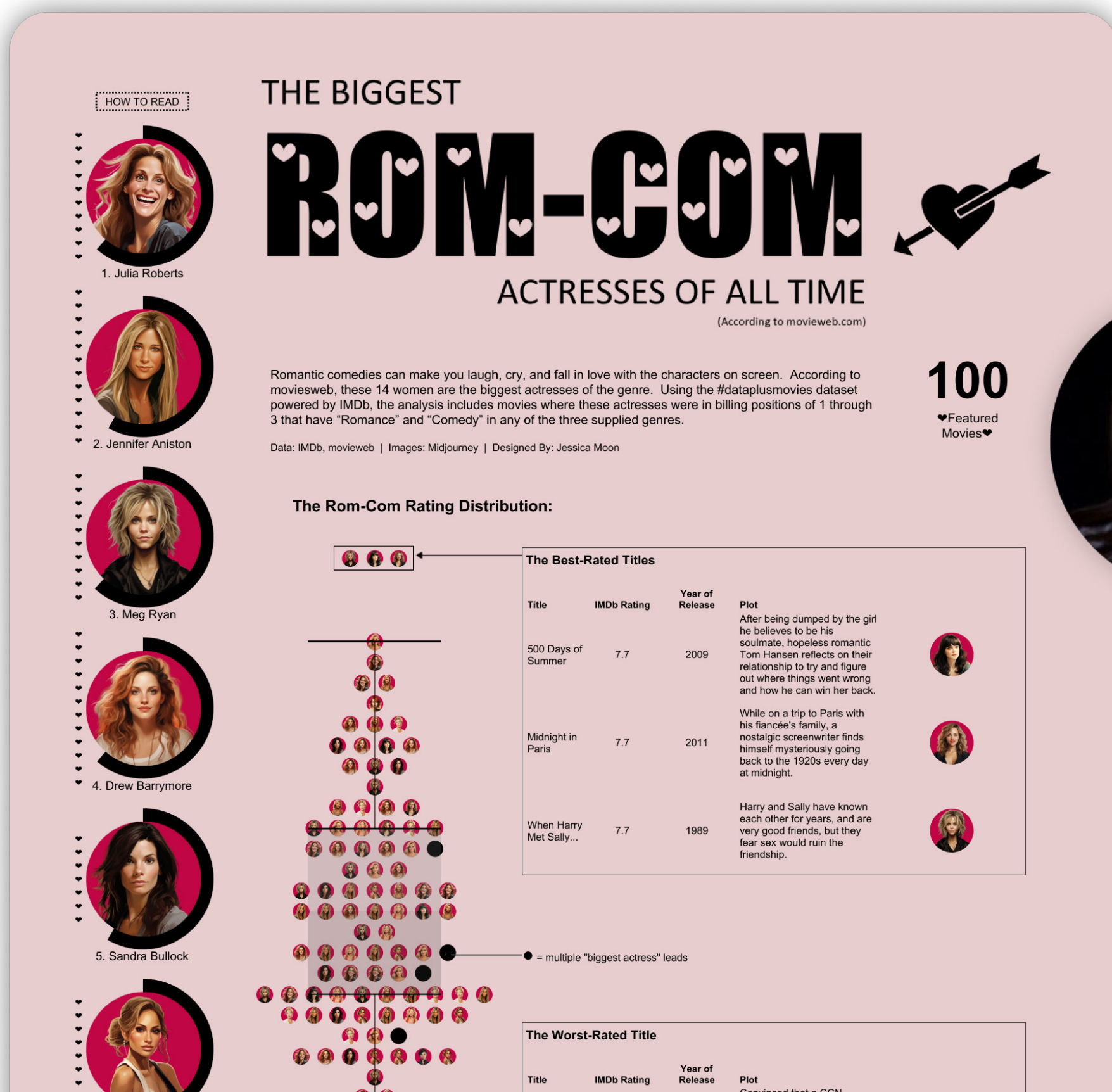
Make a title dynamic:

1. We are going to use a parameter again
2. Set up your parameter and calculation (refer back to that section if you need a refresher)
3. Set your parameter to be visible and used like a single select filter
4. Add your parameter into a text box, like the Dashboard Title

The screenshot shows the Tableau Desktop interface. On the left, there is a sidebar with sections: Dashboard (Default, Phone, Device Preview), Size (Desktop Browser (1000 x 8...)), Sheets (Custom Shapes as..., Genres, Regions), and Objects (Horizontal Container, Vertical Container, Text, Extension, Data Story, Image, Blank, Workflow, Web Page, Navigation). The main workspace displays two bar charts: 'Genres (click to filter)' and 'Regions for Genre: Comedy'. A dialog box titled 'Edit Title' is open in the center, showing the text '<Sheet Name> for Genre: <Parameters.Genre search>'. The dialog box has a 'Tableau Book' dropdown, a '15' dropdown, and buttons for 'Reset', 'Apply', 'Cancel', and 'OK'. The background charts show data for various genres and regions, with 'Comedy' selected in the 'Regions for Genre' chart.

Custom shapes for thematic matching

Just as we used custom shapes as buttons in a previous tip, we can use custom shapes as marks on a network map, scatterplot, box plot—anywhere you can add the shape on the marks card. Jessica Moon creates a beautiful cohesive theme by using AI generated images as custom shapes as well as unicode characters to make her lovely Rom Com dashboard.



Jessica Moon She/Her
 Tableau Public Ambassador
 Iron Viz Finalist 2024
 Alabama, United States
 Tableau Public: [profile](#)
 Data Viz: [Biggest Rom Com Actresses](#)

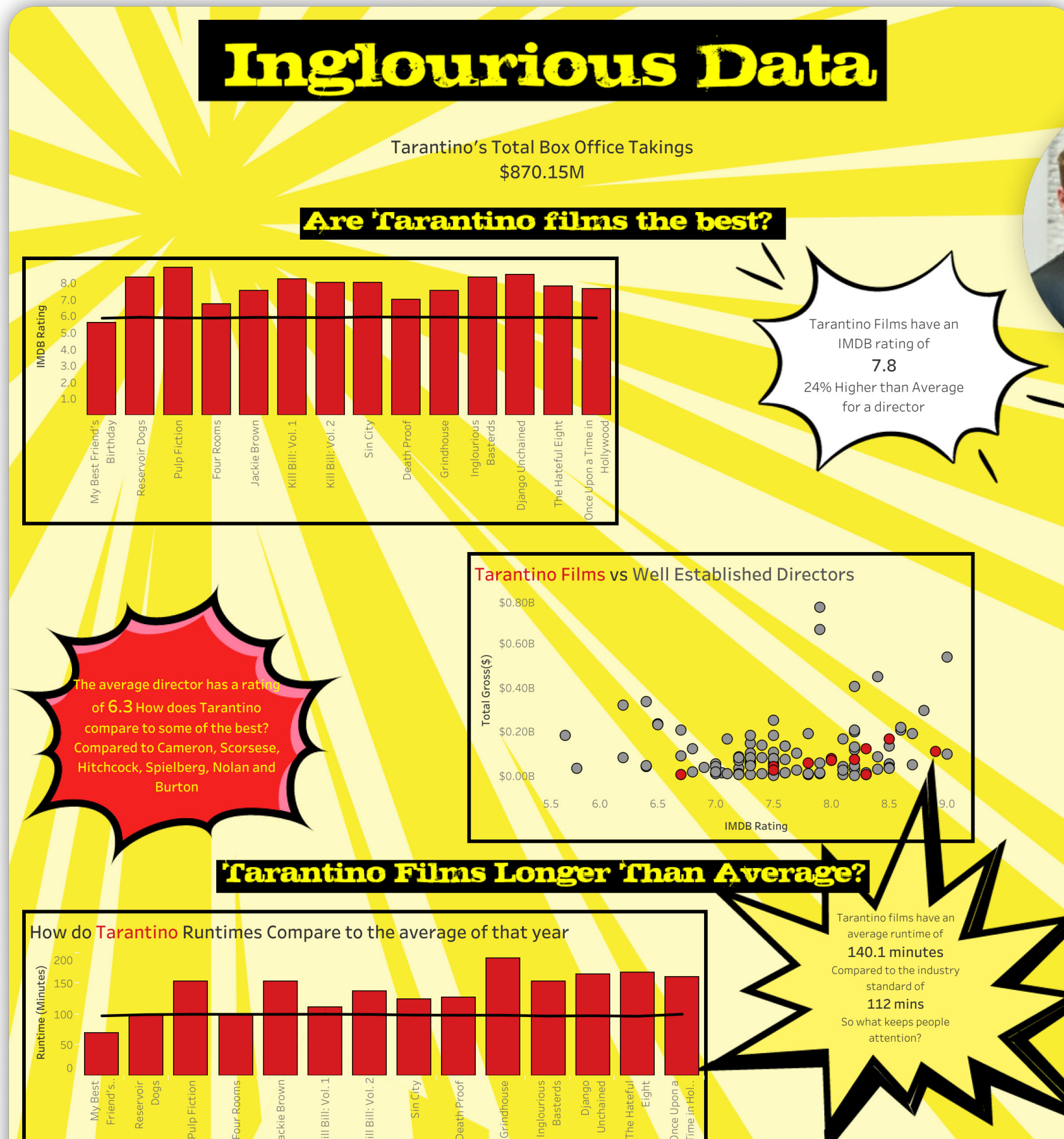
How to use unicode characters:

1. Find the character you want using the [Unicode Resource](#)
2. Copy and paste into any text input area in Tableau or use the keyboard shortcut provided
3. Spice up your dashboard!

The screenshot shows the Tableau Desktop interface. On the left, there's a sidebar with 'Dashboard' and 'Layout' tabs, and a list of objects including 'Horizontal Container', 'Vertical Container', 'Text', 'Extension', 'Data Story', 'Image', 'Blank', 'Workflow', 'Web Page', and 'Navigation'. The main area displays a dashboard with two charts: 'Genres (click to filter)' and 'Regions for Genre: Comedy'. The 'Genres' chart is a horizontal bar chart with categories like Drama, Documentary, Comedy, Action, Crime, Horror, Adventure, Thriller, Animation, Romance, Biography, Family, Western, Musical, Fantasy, Mystery, Music, Sci-Fi, History, War, Sport, Reality-TV, Talk-Show, Adult, Film-Noir, News, Game-Show, and Short. The 'Regions for Genre: Comedy' chart is a horizontal bar chart with categories like North America, Western Europe, South Asia, Eastern Africa, Indian Ocean, and Central Africa. An 'Edit Title' dialog box is open in the center, showing the title '<Sheet Name> for Genre: <Parameters.Genre search>'. The dialog box has a toolbar with 'Tableau Book', '15', 'B', 'I', 'U', a color picker, and an 'Insert' dropdown. At the bottom of the dialog box are 'Reset', 'Apply', 'Cancel', and 'OK' buttons. The status bar at the bottom of the Tableau window shows '24 marks', '24 rows by 1 column', and 'SUM of AGG(Number of titles): 73,800'.

Using titles as color legends

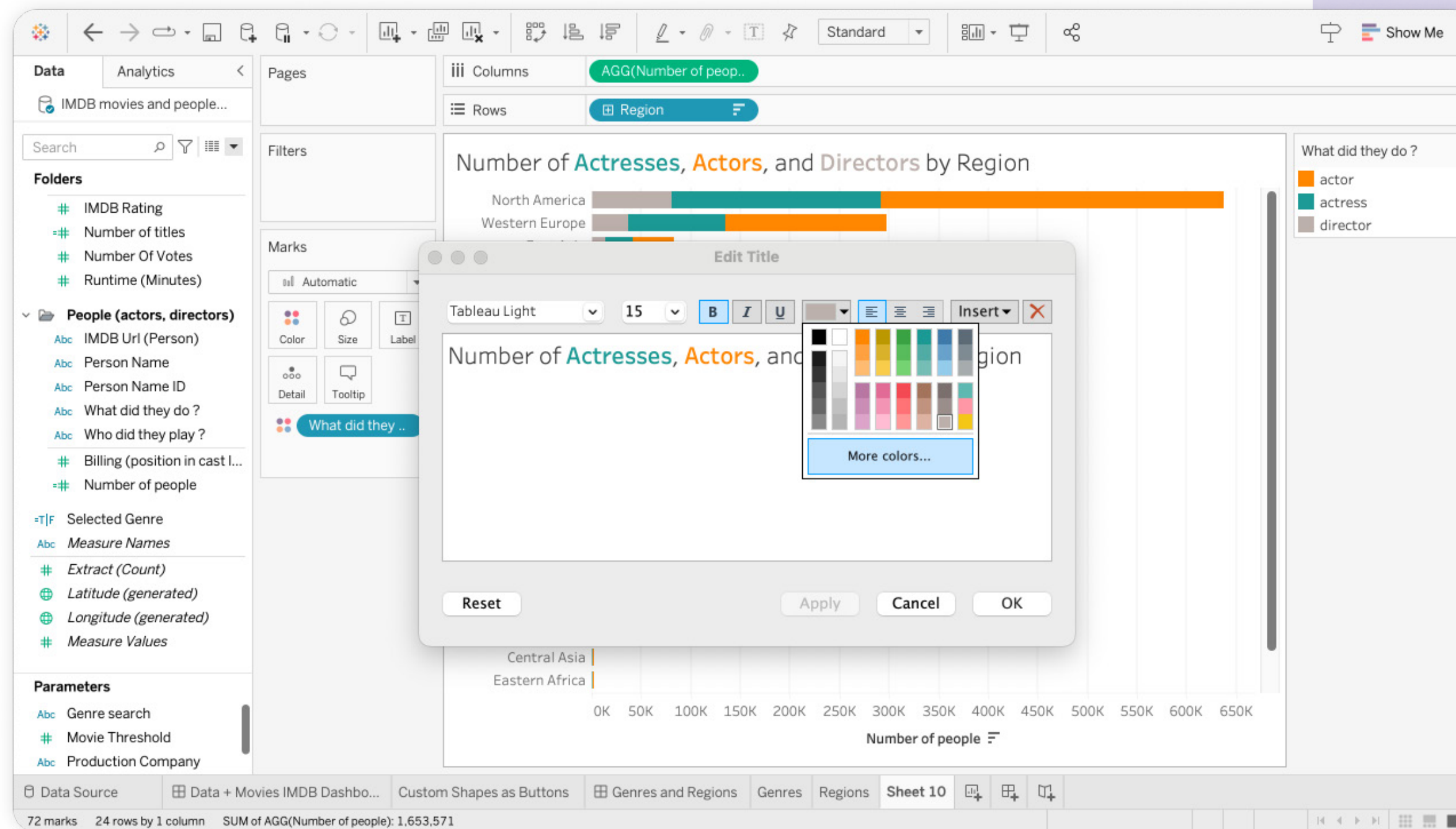
Color can be used in many ways across your dashboard, but what do you do with those legends? They do not always go with the rest of your theme. Myles Stevenson used the titles of sheets to display the color legends.



Myles Stevenson He/Him
Tableau/Alteryx Consultant at The Information Lab
London, United Kingdom
Tableau Public: [profile](#)
Data Viz: [Inglorious Data](#)

How to make your title a color legend:

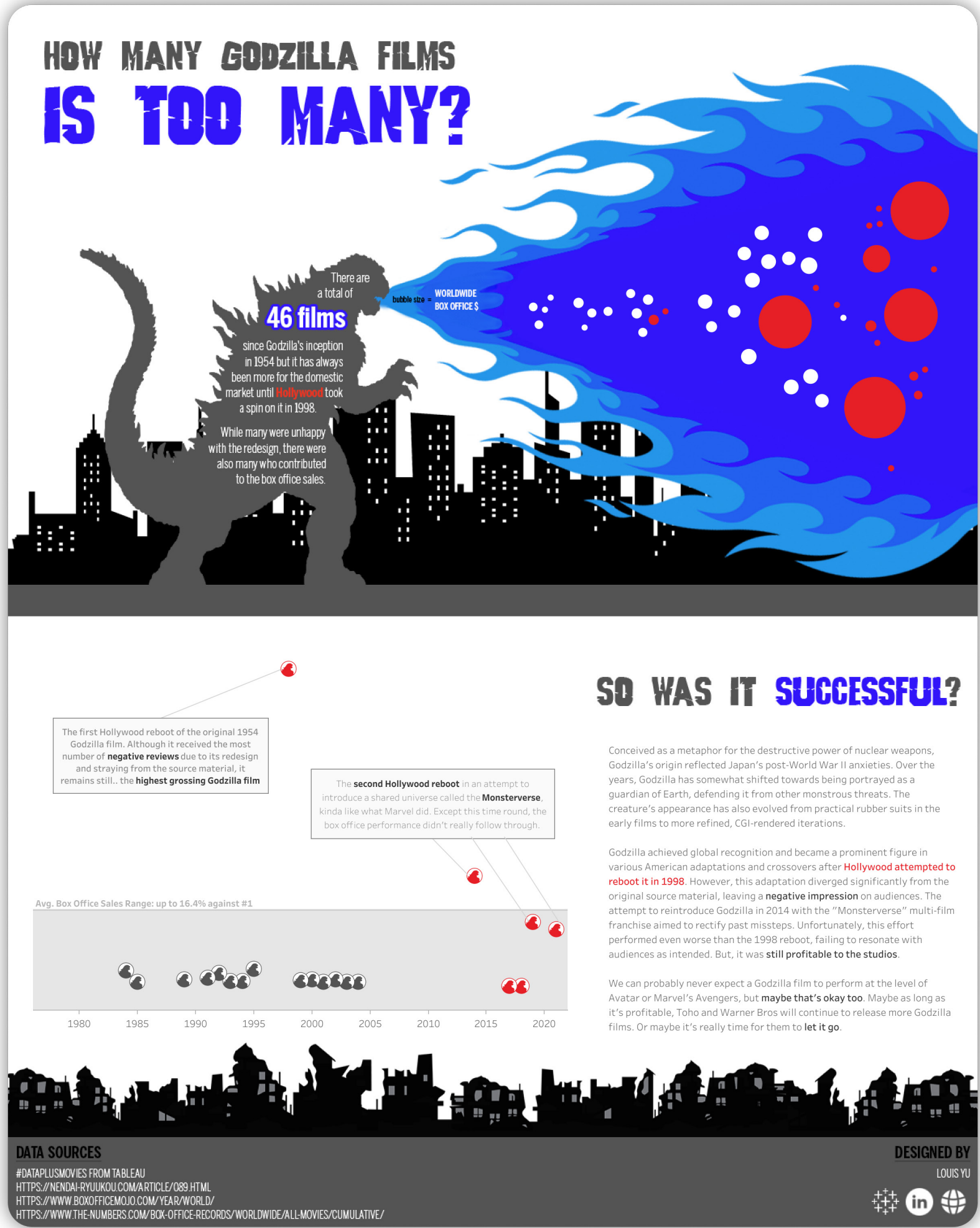
1. Open the title to edit
2. Change the title to include the dimensions
3. Change the color of each dimension to match the color in the viz
4. Be careful you do not have too many dimensions –this is a great solution when you have fewer than three



Using an image as a title



Custom fonts are fun to play with but are not standard installs for everyone. Louis Yu created his titles using custom fonts. To get them to display exactly how he wanted, he placed the titles on the dashboard as images.



Louis Yu He/Him
Tableau Public Ambassador 2023
Co-host for #GamesNightViz
Co-Leader for Singapore TUG Singapore
Tableau Public: [profile](#)
Data Viz: [How Many Godzilla Films is Too Many?](#)



How to use an image as a title:

1. Create your image in your favorite image editing tool
2. Drag the image object onto your dashboard
3. Select your image
4. Set your sizing and placement

The screenshot shows a Tableau dashboard with a title 'Fancy Font Title' and a subtitle 'Get Inspired!'. The main chart is a horizontal bar chart titled 'Number of Actresses, Actors, and Directors by Region'. The legend indicates that orange represents actors, teal represents actresses, and grey represents directors. An 'Edit Image Object' dialog box is open, showing the following options:

- Insert Image File:** Fancy Font Title Get Inspired!.png (with a 'Choose' button)
- Options:**
 - Fit Image
 - Center Image
- URL Opened When Image is Clicked:** Your URL
- Alt Text:** Fancy Font Title Get Inspired!

The dialog box has 'Apply' and 'OK' buttons at the bottom.

Learn more about branding
your dashboard.

Quick Tableau Tips

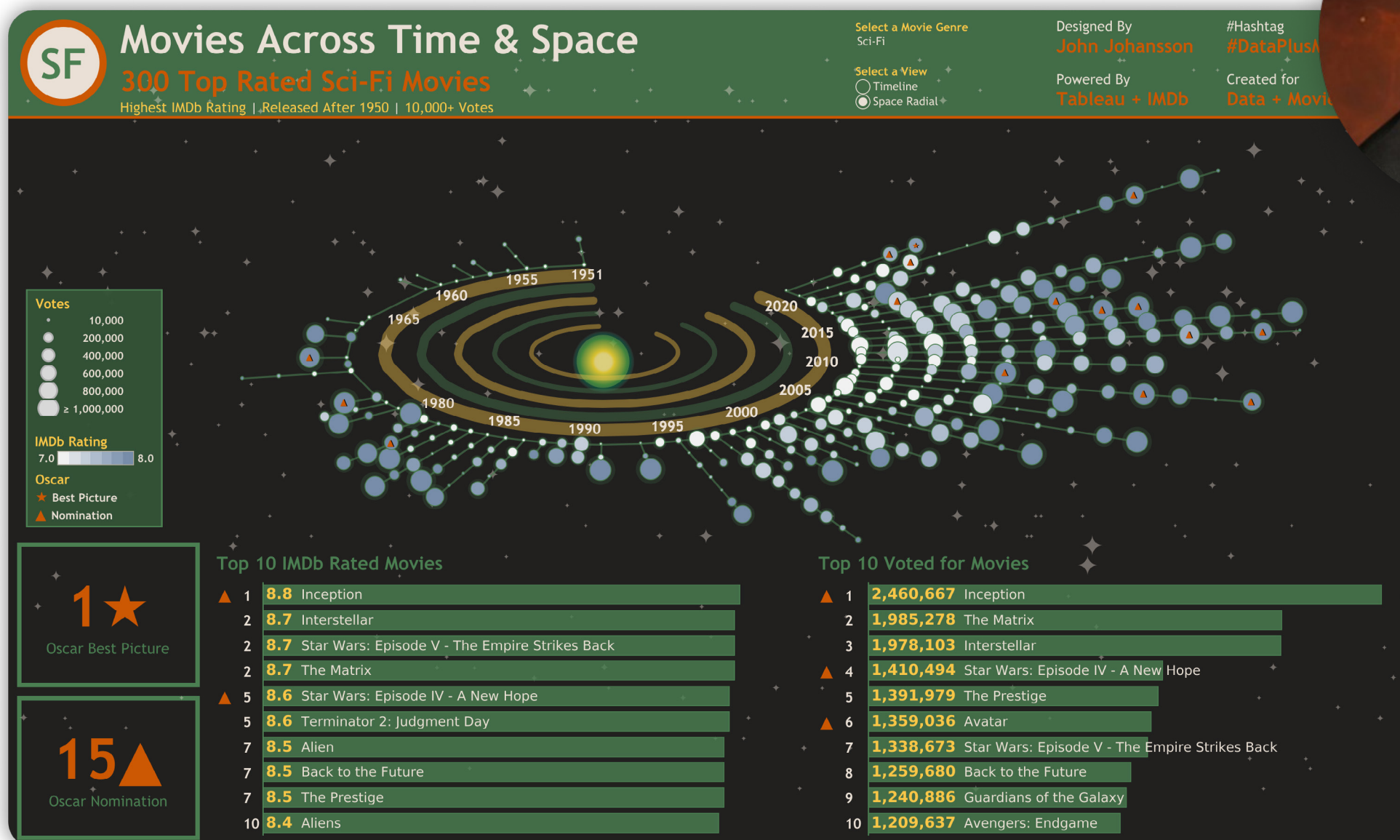
Category 3: Beyond the Bar Chart

While bar and line charts are commonly used and versatile, they may not always be the best choice for displaying certain types of data. Other chart types, such as maps and sunbursts, may be more suitable for your data analysis.

1. Maps—so much possibility
2. Sunburst
3. Seismogram
4. Network Diagram

Maps—so much possibility

When you break it down, a map can be anything. It all comes down to points plotted on x-y coordinates. With custom maps, you can use any image as your background and plot your data. John Johansson does just this with his dashboard, taking us to outer space with his map. The hardest part of a custom map is getting the X and Y coordinates in your data. Once you have that, you too can take us to outer space with your vizzes!



John Johansson

Senior Associate, Analytics Solutions at JPMorgan Chase & Co.

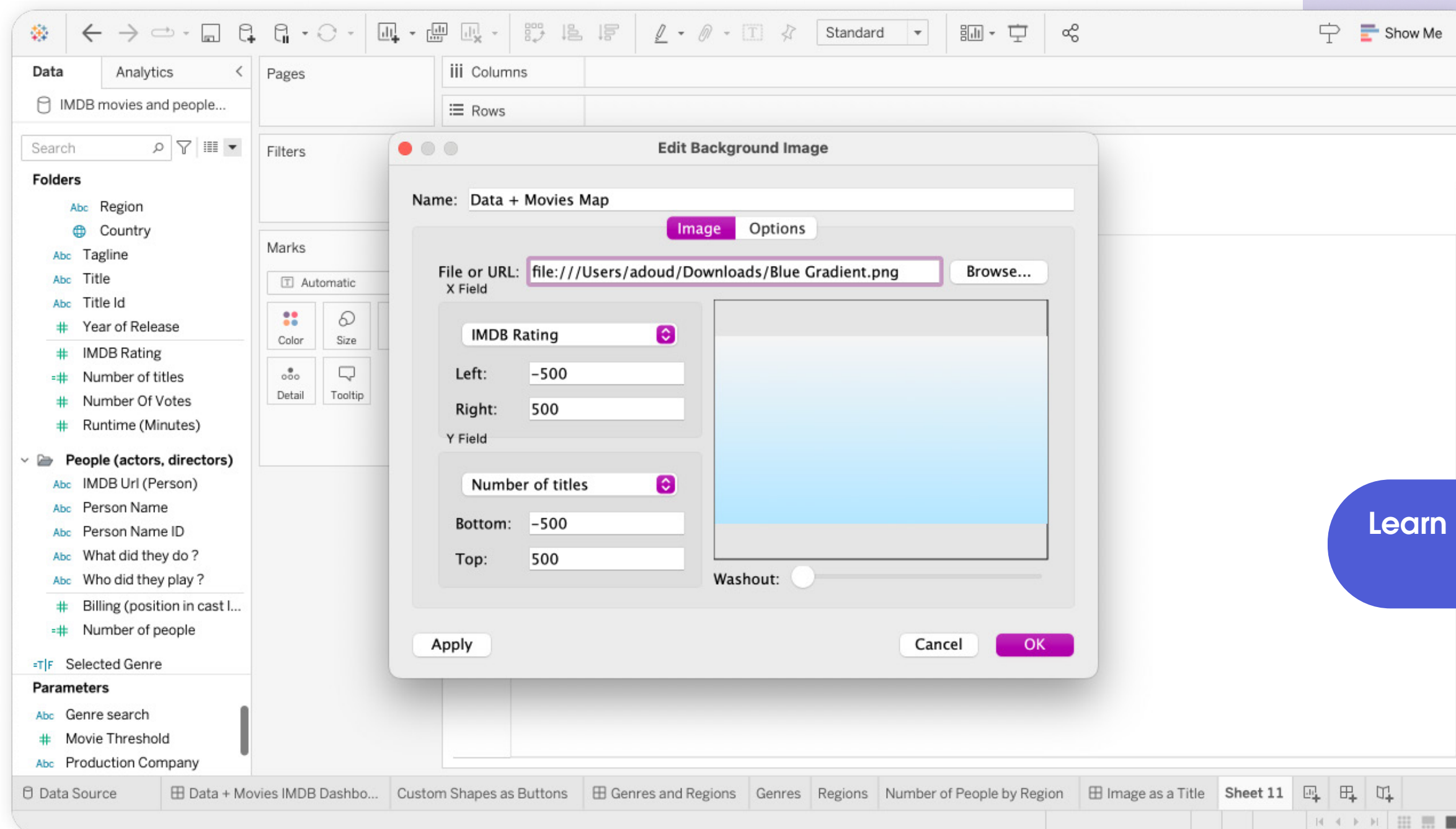
Dallas, Texas, United States

Tableau Public: [profile](#)

Data Viz: [Movies Across Time and Space](#)

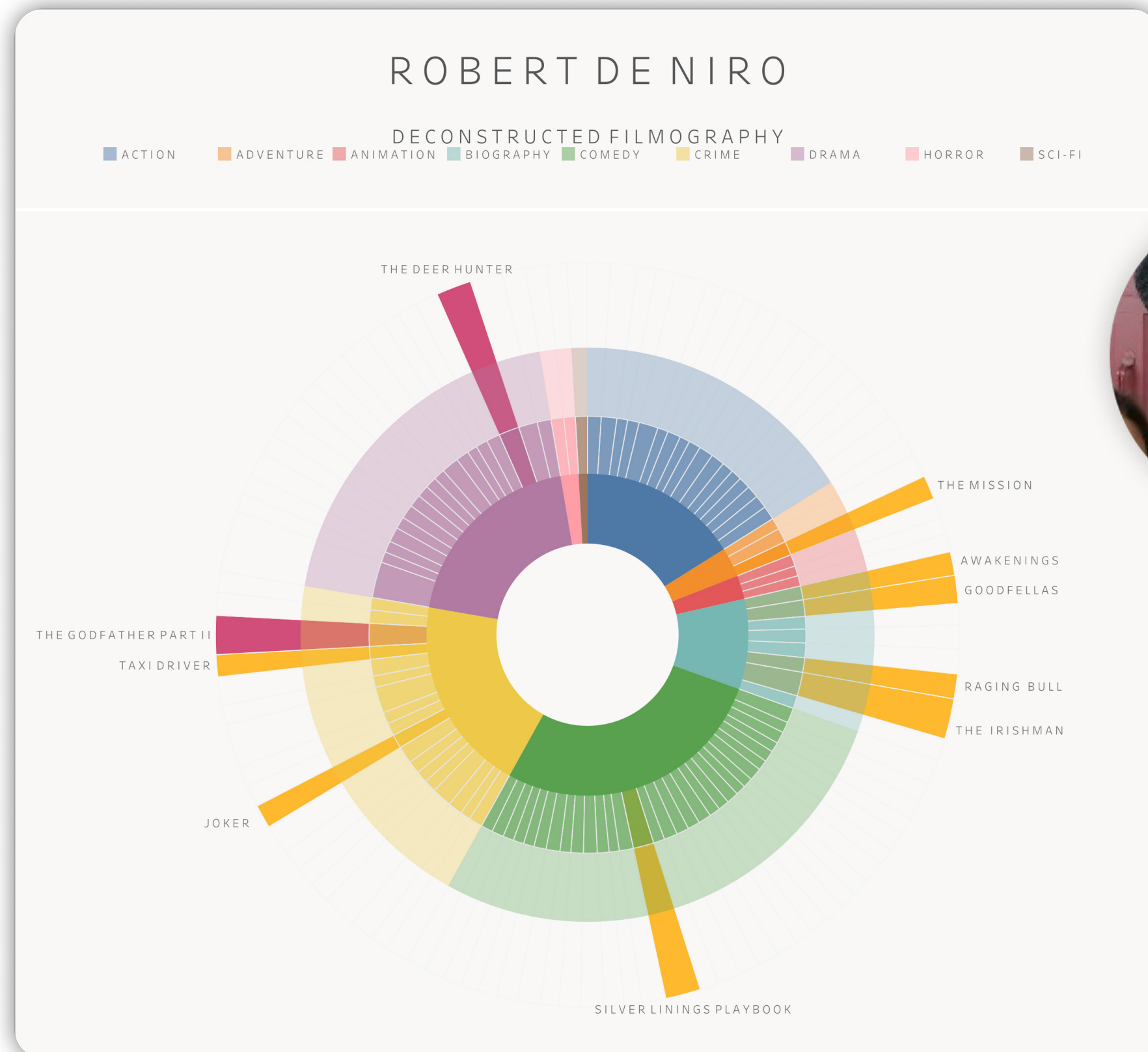
How to make a custom map:

1. Pick your image
2. Get your data right. You'll need to prepare your data to have X-Y coordinates just like lat-long. For step-by-step instructions on plotting your coordinates, visit Tableau Help
3. Select Map > Background Images
4. Select your datasource
5. Define the size and image options
6. Use your X and Y coordinates to make the map



Advanced Charts: Sunburst and Network Diagram

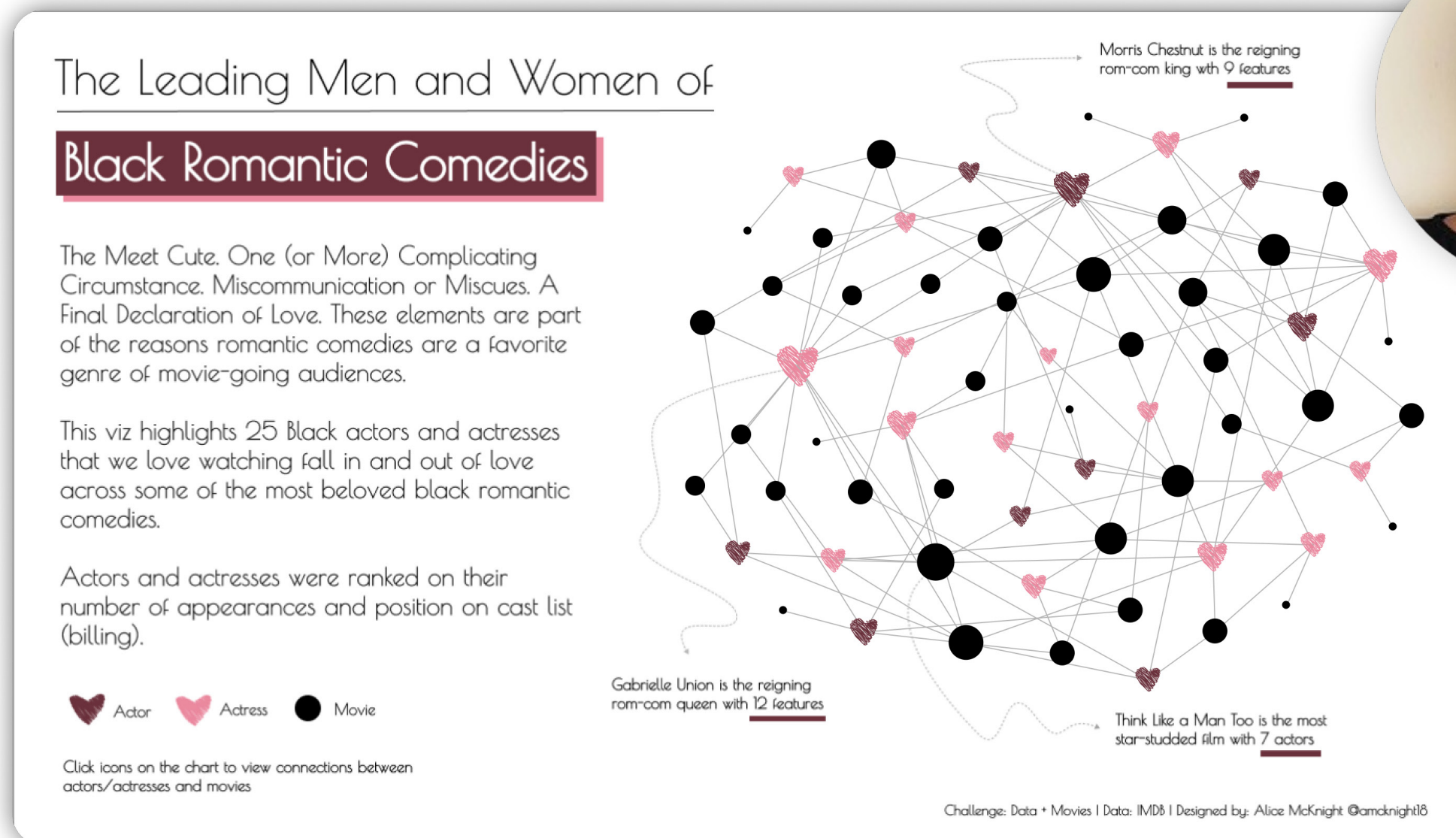
Creating advanced charts, like this Sunburst chart, in Tableau gets complicated. It takes some math and a lot of skill. Paco Llano used calculations and a combination of a custom map using generated latitude and longitude coordinates, map layers, and pie chart to accomplish his dashboard. Alice McKnight used a similar method but with custom shapes, nodes, and lines to create a network diagram. To do both of these today, you can use Viz Extensions.



Paco Llano He/Him
Program Manager at Oracle
Seattle, Washington, United States
Tableau Public: [profile](#)
Data Viz: [Robert DeNiro](#)
[Deconstructed Filmography](#)

Network diagram

The network diagram is another complex chart type to build in Tableau.



Alice McKnight She/Her
3x Tableau Social Ambassador
5x Viz of The Day Recipient
Co-Lead BLK in Data Analytics TUG
Tableau Certified Data Analyst
Georgia, United States
Tableau Public: [profile](#)
Data Viz: [The Leading Men and Women of Black Romantic Comedies](#)

How to use a viz extension:

1. Select viz extension from the mark selection
2. Find the extension you want to use
3. Drag and drop your way to stunning visualizations

To learn more about Viz Extensions, visit the Exchange.

Seismogram

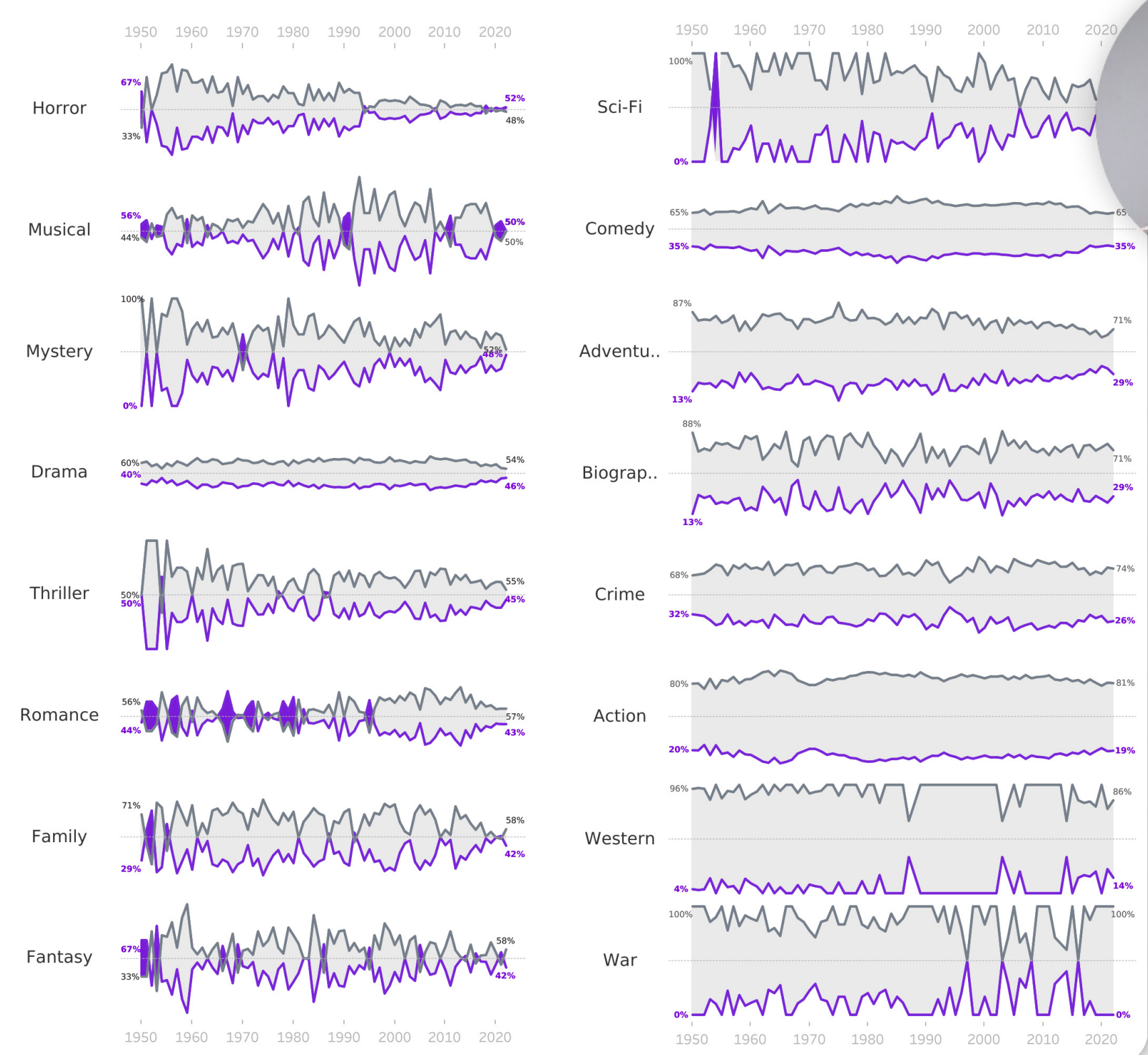
If you search around Tableau Public, you'll find a few styles of seismogram. Some use lines with continuous dates, others use bars with discrete dates. Rob Radburn used lines with shading and color to differentiate between male and female leads.



Empowering the Screen?

Exploring the *Female* Protagonists in Film

#dataplustomovies



Rob Radburn He/Him

Tableau Visionary Hall of Fame | Local

Government Analyst | Dataviz junkie

| Data Chauffeur

Leicester, United Kingdom

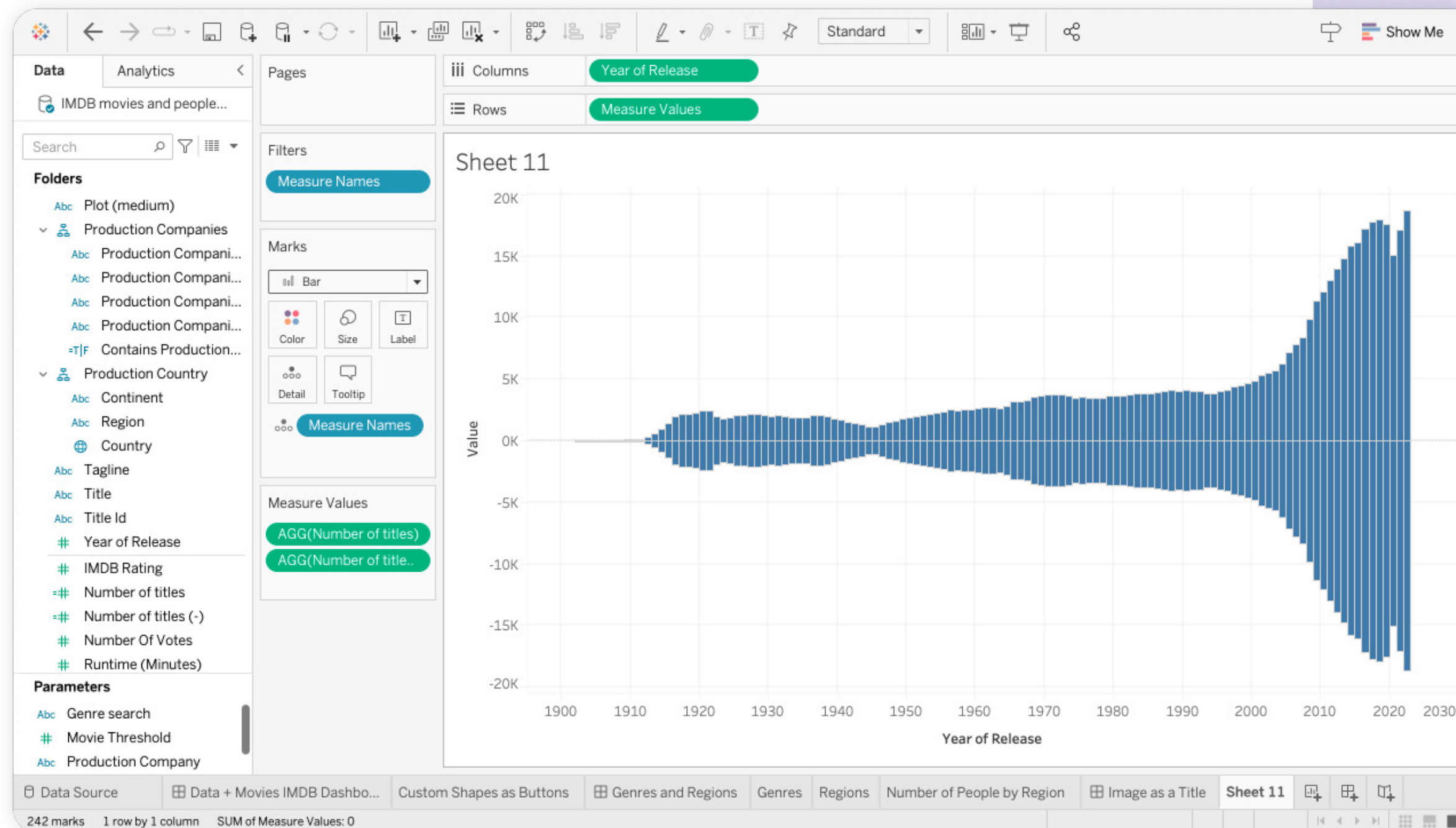
Tableau Public: [profile](#)

Data Viz: [Empowering the Screen](#)



How to create a similar seismogram:

1. Create a duplicate of your measure and make it the inverse or negative
2. Date on rows, Measure Values on columns, and a dimension on color
3. Filter Measure Names to only show your measure and the inverse
4. Change the mark type to bar for a different look



Take the challenge

That's a wrap, folks. Now go put these tips to use by taking the [Data + Movies Challenge](#). Create a viz using our easy starter kit and data from IMDb and get a free t-shirt.

