Tableau Desktop Part 3 Transcript

Building Effective Dashboards

Top of Form

Good morning or afternoon depending on where you are sitting. Thanks for joining us for the third final session of our three-part series on introduction to Tableau desktop. We are grateful that you've been able to join us. We hope you've learned a few things and you’re looking forward to rounding it all out today and helping you put together a full dashboard. In order for me to get started I have a few housekeeping items to cover. First of all, please mute your microphones. You have a question that you think would be good for the group, please unmute the microphone and share it or you can type it in the chat window there and either myself or one of our folks will respond to you.

We are taking attendance so what we do is we assign TMS surveys after the presentation. We ask that you complete the surveys, this is how you get credit for having attended the training and it also helps us. Your feedback helps us shape future trainings. If you are sitting with someone and just listening in your name does not appeal in Lync. Be sure to send your name to Stacy Armstrong and we will be sure to get you assigned. Those of you who are not VBA, send Stacy Armstrong an e-mail and get information on how to assign the survey because we cannot assign to non-VBA folks.

Before we get started please keep in mind again that Tableau has lots of pictures but we can only scratch the surface here. Our goal was to get you familiar enough that you can begin using the product and then start researching and learning some on your own. Along those lines we cannot stop and wait for everyone to get caught up during the presentation so if you get lost we have done a few things to help with that. First we created step-by-step instructions in the PowerPoint so each action taken is documented, you can always take a few steps back and review the PowerPoint and go from there. We have a list of resources after each session for you to learn more directly from the source and so that is another point as well. At the end of the presentation we will take time to go over specific questions you might have had during the presentation. Yesterday we spent a few minutes talking about questions people have both related to creating views as well as other questions that people had about the product itself so I enjoy that interactivity so do feel free to hang out with us for a few minutes after the session. We also have the course assistants, we have three people there listed under the center, we have Stacy Armstrong, and Kristin Speedling so if you have any Tableau related questions or other issues if you type them in the chat window, they will be the first respond to those. If I'm presenting and if we need to we can review something together. If they can, answer the question. If it is a type of issue you want to talk off-line feel free to send them a note directly. This is if you are in a live session of this during the week otherwise you would not be able to do that.

If you plan to do all but don't have the presentation from session two, we will be using the document titled Tableau part three start, that's been uploaded to the paperclip there in the link window. It is also here on the SharePoint site. So that you can download the documentation from SharePoint if you more comfortable with that. Either way, we are going to be starting out with the document titled Tableau part three start and the PowerPoint is also available there. The solution workbook is in the paperclip as well so after the presentation you can feel free to take a look back and see where we ended up.

Here are our objectives for today. We will talk about the dashboard panel, different sheets and objects, setting the dashboard size, very important considerations. How to answer and session objects, then we will work with the filters on the dashboard and how to make your dashboard interactive. Only we will touch on work for Tableau reader would talk a little bit in the beginning of the presentation about or on the first day about Tableau extracts and Tableau reader and how to say save a package workbook so we will step through those there at the very end.

Are there any questions before we get started?

Okay. So just a quick note, the hallmark of a data-driven dashboard is the ability to present data to allow people to ask questions of the data and it is one of the things Tableau does really well is it allows people to visually interact and ask questions from any level.

Let's jump right in today, I don't have much the in the way PowerPoint, this is probably a real blessing for a lot of you. Let me go ahead and share my monitor.

This is the starting workbook if you are not using when you started with from the beginning session you can see I've put in a few sheets that we will go ahead and use. We've been primarily in worksheets, these are each individual worksheets for adding filters on them and what we are going to do in Tableau is bring them all together into one view. The end result of what we are going for we looked at the other day I'm sorry I don't have it handy to look at, but we will look at this all in one view and you will see at the end where we are going. Let me see if I have that handy.

Bear with me for just a second. I do have it. I will be able to give you a quick demo here.

There we go. This will be our end result of what we are going to be creating here so you will be creating the sample dashboard with the drop-down on the upper right-hand side. We will be adding interactivity so when you click on the [Indiscernible] services here that interacts with the rest of the dashboard.

To start a new dashboard what you will use is the second icon here if you hover it says new dashboard or you can go to dashboard and select new dashboard.

The dashboard workspace starts out just as the rest of tableau use that with you really have a different panel all the dashboard panel. There's a couple of things to cover here. First is the preview up your at the top, this button. You see this opens a little window or pane across the top. I have not used of this we develop this dashboard have not really developed specifically for Tableau for other tools but you can create event views and change the dashboard based on the device and Tableau if someone opens on Tableau server will interpret what kind of device they are looking at and actually change the view to match their device like when you go to a webpage and it has a mobile view versus a desktop view. Tableau has the functionality to do that here on this device review. A word about size, so the size of the dashboard is generally the default setting of 1000 by 800. You can see we have it set to a fixed size but if I select the drop-down I can select automatic, range or fixed size. A lot of people like to use automatic and the problem with that is when they build a dashboard and an automatic size what happens is Tableau determines what size browser the person is working in and resizes the dashboard to fit their browser. Because I'm a visual designer I have an enormous monitor, it helps me but there’s a lot of people who can see my dashboard look at it on a much smaller scale so it if I design my dashboard and automatic on my large monitor when someone on a smaller monitor looks it will resize all the little Windows, there might be other tools on it so I recommend against using automatic. What we do is we generally use fixed size and a lot of people still like to print, I don't know about you guys so what I do as I set it letter landscape. This allows it to print in a nice simple format, the dashboards always is going to stay the same size so whatever I put on screen is going to -- people may have to scroll left or right on the monitor as a whole but within the window they won’t resize so what I said they are all my little sheets that I put in my dashboard will remain a standard size.

You see the available sheets that we have. If we had multiple dashboards and we will talk about this at the end, I want to place it on object the dashboard you can hide a sheet. So often times we will build dashboard and hide all the supporting sheet so people are only looking at a dashboard, they don't have to see all the extra tabs. It gets confusing for people because of if they go to another dashboard and use the same essentially it might not be there if it is hidden so this is only going to show us unhiding and available sheets to use on our dashboard.

Here we have dashboard objects. We will go over all those independently in a minute. This shows you have an option to have objects float on the dashboard, they can be moved anywhere or they are embedded in the page and we will cover that momentarily. This of course is a worksheet, workspace.

Let's take a look at dashboard objects. This is where I felt [Indiscernible] card dashboard objects is where we have those too far as. -- most of our tools. First have horizontal and vertical not going to do get that a second, those are really helpful for positioning. They can be frustrating to work with but once to get the hang of them they are really great. Text object allows you to add a block of text to work up and like you will do with a sheet with the dragging on dimensions and measures I can drag, use my left mouse button and drag the text object over. Or any of these objects for that matter, drag an image so an image would embed a picture in your dashboard once I drop an image on there often times we print our dashboard with specific images. Blank -- a webpage you can insert a webpage into a dashboard and a lot of people if you had a product line you might have something link to Amazon and you can have it open in the dashboard and a little browser window. The blank is just used for some positioning.

Did someone have a question?

To start a dashboard layout we are going to add some views to our dashboard. The first thing I'm going to do is use my left mouse button and I'm going to drag on a couple of things. I'm going to pull on the rate of RNs to total FTEE, use left mouse button and drag it over.

You can also double-click add to add a sheet to a dashboard so I will do time series, I will bring on the scatterplot, I will bring on a map and the pie chart.

And see it placed the objects randomly on the page. One thing I want to point out is you can remove them here if I click on the dashboard you will see up here we have these three options. Here is a drop-down for options related to this object on your dashboard. This allows you to use it as a filter, we will talk about the train in a moment. Here is if you want to remove it you can click to remove. You can drag a sheet right off the dashboard to remove from the dashboard.

To put it on my dashboard I’m going to come over here on my available sheets and use left mouse button and I want to show you when I pull it around you will see a tablet is giving me this great outline to say this is where you're going to drop it.

You can automatically place objects in specific areas. To move them when you highlight the dashboards you will see these little -- this bar here that allows you to drag it. All you have to do is hover over the little dots and it will allow you to reposition the object. It shows you the drop zone, that's what the gray highlighting is.

I mentioned a few minutes ago these layout containers. These are so helpful. I will show you why. So we have this workbook and this is the view we are going for. I’m going to reposition objects to match this. Might registered nurses to total be five is in the right spot. Let me drag my scatterplot up here and let me move my in-house emergency down. That looks about right.

Now we have everything kind of in this general area but let's say I want to move all of these, I want to keep these tree things together at all times. The nice way to do that in case I want to move these up or down right now what I have to do is move each one of them independently. If I put them in a layout container it will allow me to move them as a group. I'm going to drag on a layout container and this is where it gets tricky, you can use them as -- you can embed them within one another and I will show you that in a second but I'm going to put the vertical so you can see ]-right-square-bracket-right bracket it is the same block to say where I'm going to copy and drop a layout container at the bottom. Now I'm going to select this workbook with this sheet and am going to drag it in you see now instead of just the gray -- if it is just a gray box the nets were positioned that if I move a little bit further you will see the blue highlight comes up. See the difference? It is going to drop it, there it is putting it in the layout container. I do that with my first object now I'm going to put my second object in the layout container. I'm going to put it here to the right and you see the blue team up again, the blue line around the layout container and I'm going to drop that there. Then I'm going to put this third object in there. Just like that. Now I can reposition these things within my layout containers. You can still see I can still select the individual objects but if I double-click on these bars or select this drop-down menu on the view I can say select layout container.

Now you see the blue outline comes up and all three items are selected. If I want to move all three of these objects up to the top of my view, I can do that. I can even put them in this tiny space like that. It is a very handy feature.

What frustrates people sometimes is putting things so we have things side-by-side here because I put in -- you can only put in where is was on told or vertical objects in one layout container so say for instant I want to put my total FTEE which is actually this and this is why we want to move this if we have our regions here, it is okay but imagine the person trying to read your dashboard figuring out which legend was with which object. That said I want to take my total FTEE legend and move it down below states. Because I have a horizontal, I'm using this in the horizontal manner, the layout container I cannot insert just under here. What I can do is I can insert another little layout container inside my layout container. Here I'm going to select another layout container and put that in.

I have another layout container. I'm going to drag in my total FTEE inside the embedded layout container. Then I'm going to drag my map into that container and flip flop these. Now if I say select layout container here if I select the drop-down from this view I've got this layout container, if I select it again I've got the full layout container. There's all three objects. You might have to fiddle with it a bit but this is one of my favorite tricks and I know it gets a little bit frustrating for some folks when they first learned it but it is really helpful.

I'm going to do a little bit or formatting and talk to some of this may not be exactly documented because some of it is going to be me walking through but in essence I'm not going to go step-by-step in the PowerPoint is what I'm saying. If you've followed along [Indiscernible] this description is in the PowerPoint somewhere but I'm not going in order this time so I apologize for that.

A quick pointer here. You want to save as much space as you can on your dashboard. If not it gives the user to much to read. Here I have a total the total FTEE by station in my title. I don't need because my legend is in close proximity we can hide the title here. You can right-click each window has a title then the visualization or the title and then the legend. If I right-click in this window, you will see this show title check box is checked, I can uncheck that and we can do some resizing. Just drag, hold your left mouse button over, click it down and drag up or down. That will allow you to resize and reposition.

I'm going to remove the rate of RNs or I can move that here. This one is not in a layout container at all so I did not need to insert layout container, I can just drag the legend over.

Because we have a scale it is not necessarily critical that we have a legend because we have the scale right here, we can see what it goes to, it goes to about 40%.

We talked about the drop zone. Another cool thing about layout containers, if I wanted to put a border around this window you see there's no option to format this sheet. Once it is in the layout container if I select the drop-down on the layout container there's a format container option. Now I can put a little border around my container. There are my three objects that are grouped together.

You can also do shading but you don't want to have too much going on.

That is how I use format, use layout containers to do formatting. We will reposition these other legends and stuff in a second but I want to talk about tiles versus floating. Most of what I've shown you so far have been tiled objects, these are all tiled, they are embedded within one another. Let's say you want to have something float and the nice thing about floating is it helps to put something where right now let's say take this in-house emergency services. If I wanted to put this in here I would have to insert another layout container. And do like I did over here with my map. If I wanted to, I have a lot of white space, it is really not necessary for me to need to insert a whole other layout container and go through that and remember yesterday when we talk about less is more sometimes repositioning things slightly you might put yes or no here on the end of the lines. In this case I can float my yes or no to be on this chart so to float an object you have already on your dashboard you would select the drop-down here. Here you will see an option for floating. Now I can drag that little object and put it right there. I'm going to hide the title since I'm associating it directly with my objects, there's no reason to have the extra information there. Clearly the blue and orange go together. Then we know this is in-house emergency. Now we have the floating now one of the points I want to make about floating objects is if this is over a line obviously the line is going to go through the floating object or columns. For this reason it is important to keep in mind is if you have a chart and you put a floating object on it and at some point a feature the chart changes that means it may have the potential to interfere with your object. In this case I know if I have a title what I would do is maybe drag that and I can reformat this a little, I can select the drop-down and say a range items and make them a single row. Then I can come in here and resize for that, it all fits in one little -- in this case I know that nothing will ever interfere in my title and my yes and no will always be okay and all we show there. But if you put them in the chart you always run the risk of having the chart interfere with your legend.

The other thing we can do is we can go back to our worksheet so from a dashboard you can get to worksheet a couple of ways. This is important especially if you hide your sheet later. You can select the drop-down on the sheet itself and say go to sheet. You can use this little box with the arrow on it or you can come over here and select this go to sheet option under sheet in the panel.

Let’s say on the label I want to say show Mark labels and let's go line and on the end of the line if I wanted to just make my yes or no my label, there we go. Then I can do away entirely with the legend.

One problem we will have with this chart is the fact there's not a value on it. If someone picks this it might be a little bit difficult for them so I might be more apt to put a value there and leave the legend or add the value with the legend.

Some people in the past I’ve seen have developed dashboards that are all floating. That can be really time consuming so this is one of the nice things about mouse and let me show you quick, let's say I added couple things here. Actually let me remove -- let's say I start with floating so I click on floating when this is highlighted this means everything If I put on it was going to be floating so I can put these things on here it means I have to reposition them every time I come onto the dashboard. If I want to move one thing in all of these would need to be manually resized and manually repositioned which can be very frustrating but that's why I choose to use layout containers instead of floating objects. Last I have a real justified circumstance in which only a floating object will work. I recommend going whole dashboards with loading only components of dashboards.

I talked a little bit about dashboard formatting. A couple of things you want to know, Tableau does this automatically now, it automatically gets used but it will size the view to fit whatever area I scale to. If for some reason you have a user all they want to be a specific size and not scaled to an entire area, you can select the drop-down menu on the view and you have this option on it. You can see it says entire view off the bat. You can also say standard and now it is just on this tiny little space. You can say just the height or just width and you can see it is not building the entire view so that's what oftentimes you will use entire view but that might not work for instance in a case like this if I hit it entire view, that's pretty hard to read. So be careful if you have your dashboard filters like when district or one VISN and you have something like this in your working as has happened to me so I worked with the district and all the stations up in it I see but as soon as you went to a larger district it got squishy. Often times you may want to use the width and stick with that.

The other thing you can do, here we have a couple more legend, this don't need for me to have the size so I can remove that. The other legend we have here is called in-house services but nursing. In this dashboard we have both the value and the legend in the pie chart so there's no reason for us to restate that. I'm going to remove that. It is giving me me awarded because I selected the entire layout container. Was an object in there. Now we have a little bit more space so that's how you can remove. But save I wanted to show the legend again. What I can do is select this drop-down and you will see an option for legend and you can show the color legend. It moved it down here but this is one I can move up if I'm wanted to have it so you can reposition that. I just got to legend from clicking the drop-down, legend so you have to go onto the view add any legend that are applicable would show here.

The other thing is titles. Our titles right now are determined when we first set our views yesterday the titles are determined based on the sheet name. What I can do is I can actually edit some of the properties of the view right here in the dashboard. Here you will see total FTEE by state is the title, if I right-click you will see I get the option to edit, reset or format, if I reset it is going to go back to what the name of the sheet was. If I want to edit it manually I can right-click and say edit and double-click too in here I can change color and do some formatting options, all that good stuff.

One thing you want to do is if you're going to do one -- you don't want to have to remember we said you don't have a lot of fonts and funky things going on, you want people to be able to focus on the data. In this case I would want keep all the titles in the same font. Here's one that's not I can edit that. I might -- I would probably do 10 for the most part but just to be consistent you can do that. I also put in before I created this I have a line here that says click to filter the entire dashboard. This doesn't work so you have to make sure that work so if you provide instructions on this we make sure they work. What we have done as a best practice is put all of our instructions in one color so most of our users know now that if there something you can interact with we provided them a little bit of information about how to do that.

Are there any questions so far?

Anything you want to take another look at?

Up here there's this little drop-down, the view so if I click on in-house nursing services and selected the drop-down. You will see the legends option and I click color legend. It popped it over here for whatever reason so I can reposition that or I can select the drop-down and move it around like that. That's how you get the legend back.

Okay. Next up we will talk about filtering. If you remember yesterday we looked at cultures on a view and that's great so I could go ahead and create a filter on this view. Let's go to this sheet so I'm going to use this box if I hover, you see the box with the arrow on it. I'm going to click on that to go to the underlying sheet. You can also click on here but if it was hidden I always use the sheets, it is easier. You can see here the VISN name. I've already dragged it on there for you but in the instruction if you want to remove that you can put your sheet name and drag that up to your filter shelf. It is going to prompted to say which VISN do you want to see and I can hit all for now because we leave it at all.

Now it is on the sheet. If I go to my dashboard and if I click here on the drop-down to format this part of the dashboard, this view, you will it see under filters so I selected filters. I have the option to see the VISN name filter so I will click on that. Like with legend that was here now I have one for filters, I click VISN name. It has put it down here in the bottom again that seems to be the spot probably because I drag this guy here but I'm going to drag that up to the top of my dashboard. Make sure the drop zone is the whole top part. I will show you in a second. From the space consideration this would be very ineffective for our audience to have to scroll down like that. What I can do is I can select this drop-down here on my -- remember that drop-down helps all your options are there associated with that object so I select the drop-down and I'm going to change this to a multiple values drop-down.

Now if I select VISN from here I can just select all or uncheck and select multiples, you could not see this change and the reason is this is an awfully long filter. What we are missing on the dashboard is a text title so I will pop that in there for a second. I will talk about that again in a second but I just wanted to make room here. Now if I uncheck all you will see all my facilities disappeared, might VISNs. FICO do as I check and uncheck fewer or more are displayed. The problem is I have the expectation that your user is going to have this VISN maybe apply to all the sheets on the dashboard. If you have associated it and all the objects -- it can be confusing to your user. -- you can select your filter, select the formatting menu where options associated with that filter and if you scroll about midway down -- I'm sorry, right here at the top you see apply to worksheets. Right now it is set to only this worksheet. I can put it to selected worksheets so let's say I only wanted it to apply to a couple things on my dashboard, I can select those objects. Or if I say select this drop-down and say apply to worksheets I can just say all using this data source. If we had any data blending going on that's where that later date data source would come, we will cover that in one of our Lunch & Learn sessions.

But now when I add additional VISNs, my entire dashboard gets filtered. Very heavy, very fast. Once you get the hang of these you build them in seconds.

One of the reasons I like to keep in mind when I set up I to worksheets of using this data source of that means on every dashboard so if I have a dashboard two in this case, and I don't put the VISN name filter like the actual filter object of your people are going to have go to a different dashboard to come back here to filter so you want to make sure that if you apply this filter so I put it on every data source, watch what happens. Right now I don't have the basic name filter on there. Let’s say I have the small group, when I come to dashboard two you can see it is filtered because it is the entire data source so everything is associated. Whereas if I had just stated -- but because I did not put the filter on here the person cannot change the filter and would have to come here on to this dashboard and click on filters and show the VISN name if there is the VISN name filter on this dashboard. If I filter between these two dashboards now when I go back you will see they are connected.

That's a nice thing, they persist throughout the workbook. If I did not want this to be the entire workbook everything associated with the data source I can click only selected worksheet and I could just do this dashboard. So just to be sure I get that right let me go back to this worksheet and then if I selected worksheet and said all on dashboard, and click okay. Now if I'm on dashboard one and I click on Rocky Mountain and then if I go to dashboard two, I still have it related apparently but that's how you would disconnect them.

Somehow I still have them connected. Or that could have been filtering just the sheet and not the entire dashboard is probably what happened. Just something to keep in mind. Are there questions about making the filter persistent throughout the dashboard?

Just to be clear you don't have to go to the sheet, you can actually just select the drop-down and click filters and you can add any filter from here that is on your sheet. The reason we went to a sheet first was because VISN name in theory should not have been there but it was available because I left it there by mistake.

Now I want to talk about actions. If you remember in our example here when I clicked on the pie, the old dashboard filters so that's called a dashboard action. It is like a filter but it is based on a view instead of based on a filter menu. There is a couple ways you can do this, there's three types of actions in Tableau. I will show you them in more depth momentarily. Let's say we want to add a quick action to our dashboard, nothing fancy. You can actually click this icon at the top of your view and you hover and this uses a filter. If you do that you can see that the dashboard filter is just like that. That's the fastest way you can create one let's say you want to do something more in-depth. You have some options that are associated with it. If I click here on my dashboard menu you will see there is a dashboard action. When I selected that it brings up this dialog box. Here is our filter and it says filter one generated so that means it is generated by the page. You can move that. Now if you were to click on here if we go back toward that action would be gone. I just want to show you how to use those manually.

If you click on add action here so the three action types are filter, highlight and URL. We are going to set of action, that's what we have set up before and I'm going to pick filter. You will see it comes up with this filter action dialogue. This happens to me every time. First I'm going to name it, let's call it in house nursing. This is set to menu and I'm going to show you quick if you want to leave that open let me demonstrate on the screen for you, if I click okay but a menu option does I put in action but it is not doing anything but now you will see when I click it has this in house nursing services, that's a menu option so the user has to do two clicks to get the filter to work. That's what a menu action does. Let me go back in here. Make sure because this will drive you crazy one day instead of using them and the menu make sure you use select. That's the run action on select. Here we have our source sheets so this is the source and this is the information that's driving. Right now this is saying every sheet drives every other sheet. In our case we're going to uncheck the sheets, we just want to use the pie chart. We will use the pie chart to drive the rest of the dashboard. If you just click pie chart, click run action on select and let's have the pie chart stay the same because if I filter it -- let me show you what happens. I'm going to send it to all the sheets and we can send all the fields if you only wanted to send the specific value you could target one or two dimensions in your data. You could actually pick what fields you want to filter on in your view or add an action to.

Now if I click okay watch what happens when I -- now it is not going to do it. Sometimes when I saw the dashboard actions it will filter the sheet that I'm working on and it goes to 100% so that can be a little bit confusing which only, it not happen in this case, but what I usually do is I don't want to filter so much the pie chart so these are my target sheets and if I click okay now it is the same thing. It will happen one day, you will see.

Now when I click on my sheet I created an action so everything is filtered on the in-home nursing services. To edit the action I go back to the dashboard menu, I click on actions. I select this object and the reason I name them sometimes I do multiple things, it is important to have those names, it is easier than using the filter when generated to remember if you get filter one, filter two, filter three, it is hard to keep track. So that is how you would edit it.

There's also this run action on hover and that can be a great way to help people discover your data. If you click okay, you notice now if I hover just when I moved over stuff it changes. The problem with that is sometimes the filters don't stick. People have a hard time, they might have hovered but as soon as I un-hover the data goes back. So I tend to like the hover in some cases and not on others but something to keep in mind.

Are there questions about dashboard actions?

The other types of actions you can add our filter and URL. URL will actually if a person clicks on a sheet will take them to the URL. Very helpful, highlight will highlight other areas of the data so let me leave that, I can show you real quick. Let's use our map or maybe our VISN.

This is highlighting the data, it is not filtered but it is supposed be highlighting.

You would see highlighted -- I'm not sure what we would be highlighting but I'm not familiar with this data set.

Anyway, you get the idea now it is just highlighting, it is not actually filtering any of the values.

From your experience would you use an action filter on a dashboard instead of just setting of a filter like we did with the VISN? That's in some cases yes, in some cases no. We are recording so I cannot show you a demo but there is an instance where one of our dashboards we provide visual file numbers on a scatterplot like this. It allows people to select those objects so I can click and highlight that group of objects then in a change below we have the detailed information, the file numbers and other really valuable information. So from that perspective an action filter or dashboard action is better than people having to search for 10 claim numbers. [Indiscernible] and spot the outliers and highlight that information very quickly so let's say in this case let's go to dashboard action not let me remove that; let's add an action to our filter action from our scatterplot. And send it everywhere else.

Now when I click on this guy and I say -- it is not working. I'm not sure why my actions are not working. I must have had a filter on there somehow.

I'm not sure why that's not working.

Anybody feel free to -- I know why. Maybe not all the fields appear in these other -- no, we have VISN over here. That's a good learning opportunity, I don't think I have the VISN name on here.

That's crazy. Sometimes what will happen I'm not sure why this is, it is an interesting question but we use the scatterplot often for the visual discovery so when we talk about that when lowering your users to visually discover your data, normally and I don't understand why that's not working. I don't understand -- let's uncheck now. We check all. I love these. For some reason it is being feisty but I click the user filter the button and get the generated filter and now you will see if the user wants to know what's going on with the facility names they can click and use this as a filter so that helps with visual data discovery.

I don't know what happened but you're welcome. It depends on the circumstance. And how far in you want to go. Other questions about filters or actions?

All right. But there's our sample dashboard. I want to cover briefly how I inserted a title to move our basic name over. I did that again just by dragging the text object up here and dropping it in the dashboard. Now I just called example dash board. Sometimes your title will want to be, you want your title to be obviously bold and bigger but it is just a title so you may not want to do that. That give us a little room and if I -- you see you have the option to show dashboard title. The reason I don't like using the dashboard title is because I cannot put something like next to it unless I hover it. There's no option to do that so that's why I usually insert a text object. We would always want to rename our dashboard.

Then this is something I mentioned earlier but I want to show you. Once we have a dashboard together and dashboards indicated by the little square that looks like a window pane. I go ahead especially from [Indiscernible] other people you can hold the control key down and select multiple sheets or you can go one at a time but I right-click and hide them, hide the sheets because of times it can be confusing. One of the nice things about this is if I right-click on those and then click one that is not in my dashboard so this CA are accreditation is not in our dashboard if I right-click to hide it doesn't give me an option to hide, I have to deliver so delete it so it has to be embedded somewhere in order for you to hide it. It won't just let you delete things that don't show up somewhere. And vice versa, if I wanted to delete this sheet I can only hide it because it does appear on the dashboard. But you have to do is first remove it from the dashboard and then delete it. Another thing that I like is if that say I build a dashboard and I don't like it and I want to delete it if I try to delete my dashboard it is going to ask me what do I want to do with the worksheet that are still hidden. So that's helpful as well. That is dashboard in a nutshell. Before we get onto sharing let's see we have a question, even with a sheet hidden is the user still able to get into the sheet to the view option? Yes, if they have the full version of Tableau desktop. They are just using Tableau reader they would not have that option but here if they open and there's no way to lock down your data, like sending out an Excel spreadsheet. So if I send this workbook out and someone with full version of Tableau desktop so they can you go into everything underneath, they have all the same options you do. So this is where people get they lose their stuff, drives them bonkers on your dashboard this is where you have that go to sheet option. That's how you get to the sheet. Then you can unhide it. You can also rename it. Then you can unhide it by clicking on the sheet.

They can also select from the drop-down here, go to sheet. You can even duplicate the sheet. I do that a lot instead of overwriting my data I usually start with something I already have been working with.

Not that I'm aware of, Kyle. Again if they don't have the full version of Tableau, they would not be able to do that but if they have the full version than they would be able to go in and fiddle. I know it would be nice if you want them to not be able to fiddle, that's where Tableau server can come in handy because we can push the dashboard to Tableau server and not allow them to be downloaded. That's where Tableau server is really helpful. But if you put them to Tableau server with the option to download that they would be able to play and manipulate the data. If they have the full version of Tableau desktop.

The last thing we want to take a look at is how to share our work if you remember this first slide we have we talked a little bit about Tableau reader which is what we will do is create the Adobe PDF version essentially of our work book. This is where [Indiscernible]. Check your microphones.

If you go to -- if you remember also we had -- we talked earlier and this is where a promised they would all come together we talked about the package work book or .TWB file so to save your work in the package workbook meaning it is going to take all the data and wrap it up so you can send it out to someone as a full everything, here's the data, here is the view can help yourself, it is very simple you just do file and you can click export packaged workbook or you can click Save As. So save as and I can down here save as type either a package work or Tableau workbook that's where I want to set packaged workbook. It would prompt me to do those so let me just do this so I can keep track of what I'm doing. Then I will show you if you have the Tableau reader installed what it looks like, what it allows you to do and opening that now.

[Indiscernible--Audio cutting out] for anyone who has -- they can get to the data, they can export it, all that good stuff so this is a Tableau reader, if I go ahead and open the work work and here is the workbook I just saved. Now you can see the work work does all the activities but they don't have the go to sheet option, they don't have any of that. They don't even have the option to see the underlying data on all they can work with is fiddle around with the views. So that's where the reader comes in handy it’s like the PDF version of Tableau. Very helpful. If you were to publish to Tableau server it would obviously be available on the server but most of the workbooks [Indiscernible] that are offices published we allow people to download because we want them to get in and build new things and discover the data so you can either use it depending on the type of data you are sharing as a way to be open about the data or as a way to lock it down.

That is how you dashboard, that's how you save the package workbook. I do want to make the point for those of you I know we have a couple people in here who might be working with SQL queries. If you were to save this as a packaged workbook and you had not created an extract of your data, so this is not an extract you could tell by the icon here it is just a single database logo if I extract the data it is going to prompt me to save the file to my desk top or something or whereever I decide to save it. What that's going to do is an Excel it doesn't matter but for a SQL query it is going to build a local copy, that's the .TWB file we discussed. Now you will see it is like this two database icon I think because Excel it did their part to me if it was a SQL file it would have prompted me. Or may have just saved it before so it did not but so now it is actually broken the connection if this was the SQL Server or an Oracle server or any other server, it has actually broken the connection and made a copy of your data in a .TWB file. If you are going to save that packaged workbook to be used in Tableau reader you would need to create an extract and package the workbook so something important to keep in mind we will talk about that more during some upcoming sessions but something for you to think about and if you have specific questions or if you want some help when you first do that our office would be happy to help you with that.

Are there other questions that you all have today?

Don't forget your dashboard resources. We have that in the PowerPoint and of course where to get lots more information. Always something where to get lots more information, yesterday somebody came to me with a problem and I did a quick Google search on an error they were getting and found the solution, I found the problem anyway, there was no solution for that specific [Indiscernible] corruption issue but always try and reach out and see what you can find.

With that we will hang on for a few seconds. I hope you all learned a few things and that you continue to grow and develop in your Tableau skills. We love what we do, we have the upcoming Lunch & Learn series. We will be posting more information about that. Please do join that. We also have the Tableau User Group so let me plug our Tableau User Group. And we will put that in, please feel free to join and follow along. Thank you very much. Good luck.

I'm excited to see what you all do, but if you ever want to share, we would be happy to see. We love to offer feedback and sometimes it may take us a while to get back to you but if we can help we will do our best to provide you with resources. Thanks, everybody and have a great afternoon. Carry-on.

[Event concluded]



Bottom of Form