

University of St Andrews

Tableau Cheat Sheet

Gonzalo Gabriel Méndez
ggm@st-andrews.ac.uk

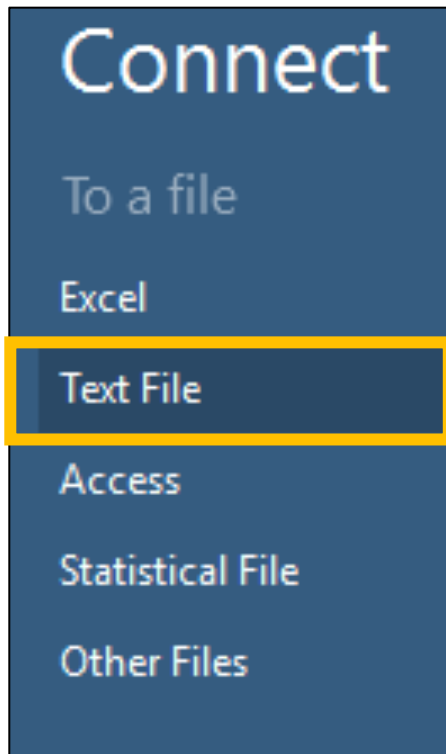
Uta Hinrichs
uh3@st-andrews.ac.uk

Miguel A. Nacenta
mans@st-andrews.ac.uk

Importing Data

①

Click the **Text File** option and select the **CSV dataset** with the file browser.



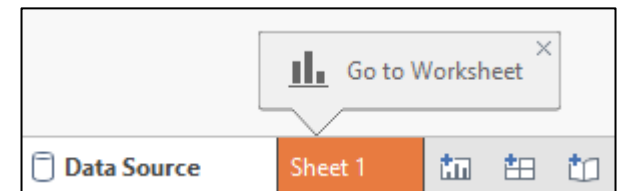
②

Your data will be shown as a table:

Abc	#
PeopleDataset.csv	PeopleData...
Person	Age
Emily	45
John	31
Charles	38
Claire	51
Samantha	65

③

Go to your newly created Worksheet by clicking the orange **Sheet 1** tab.



Worksheet Interface

The image shows the Tableau Worksheet Interface with several key components and annotations:

- Data Pane:** Located on the left, it contains the 'PeopleDataset' data source. It is divided into 'Dimensions' and 'Measures' sections.
- Dimensions:** Contains 'Person' and 'Measure Names'. An annotation 'Categorical Attributes' with an upward arrow points to this section.
- Measures:** Contains 'Age', 'Number of Records', and 'Measure Values'. An annotation 'Quantitative Attributes' with an upward arrow points to this section.
- Columns and Rows Shelves:** Located at the top, they are highlighted with a yellow box. An annotation 'Attributes we want to visualize are dropped here' with an upward arrow points to this area.
- Marks Card:** Located in the center-left, it contains 'Automatic' and 'Color', 'Size', 'Text', 'Detail', and 'Tooltip' options. It is highlighted with a yellow box. An annotation 'Marks' Visual Variables (and other useful stuff)' with an upward arrow points to this card.
- Visualizations:** The main workspace contains two 'Drop field here' boxes. An annotation 'Visualizations will appear here' with an upward arrow points to the right-hand box.
- Show Me Panel:** Located on the right, it displays various chart types and a 'Select or drag data' instruction.

Columns and Rows Shelves

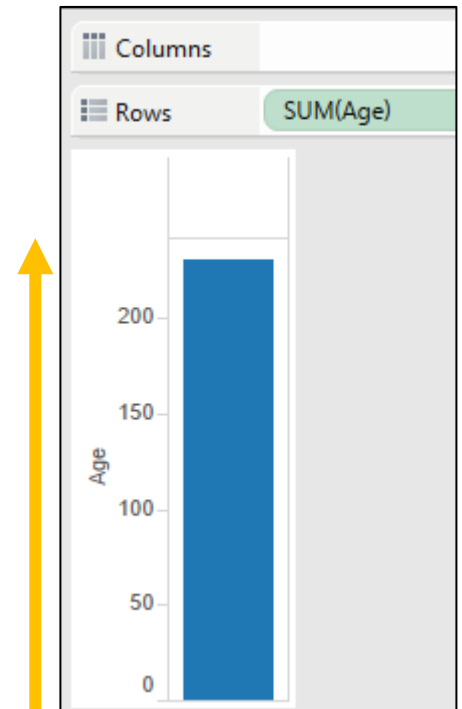
The **Columns** shelf creates the columns of a table, while the **Rows** shelf creates the rows of a table. You can place any number of fields on these shelves.

Person	Age
Emily	45
John	31
Charles	38
Claire	51
Samantha	65

Dataset

Columns	Person
Rows	
	Person
	Charles Claire Emily John Samantha
	Abc Abc Abc Abc Abc

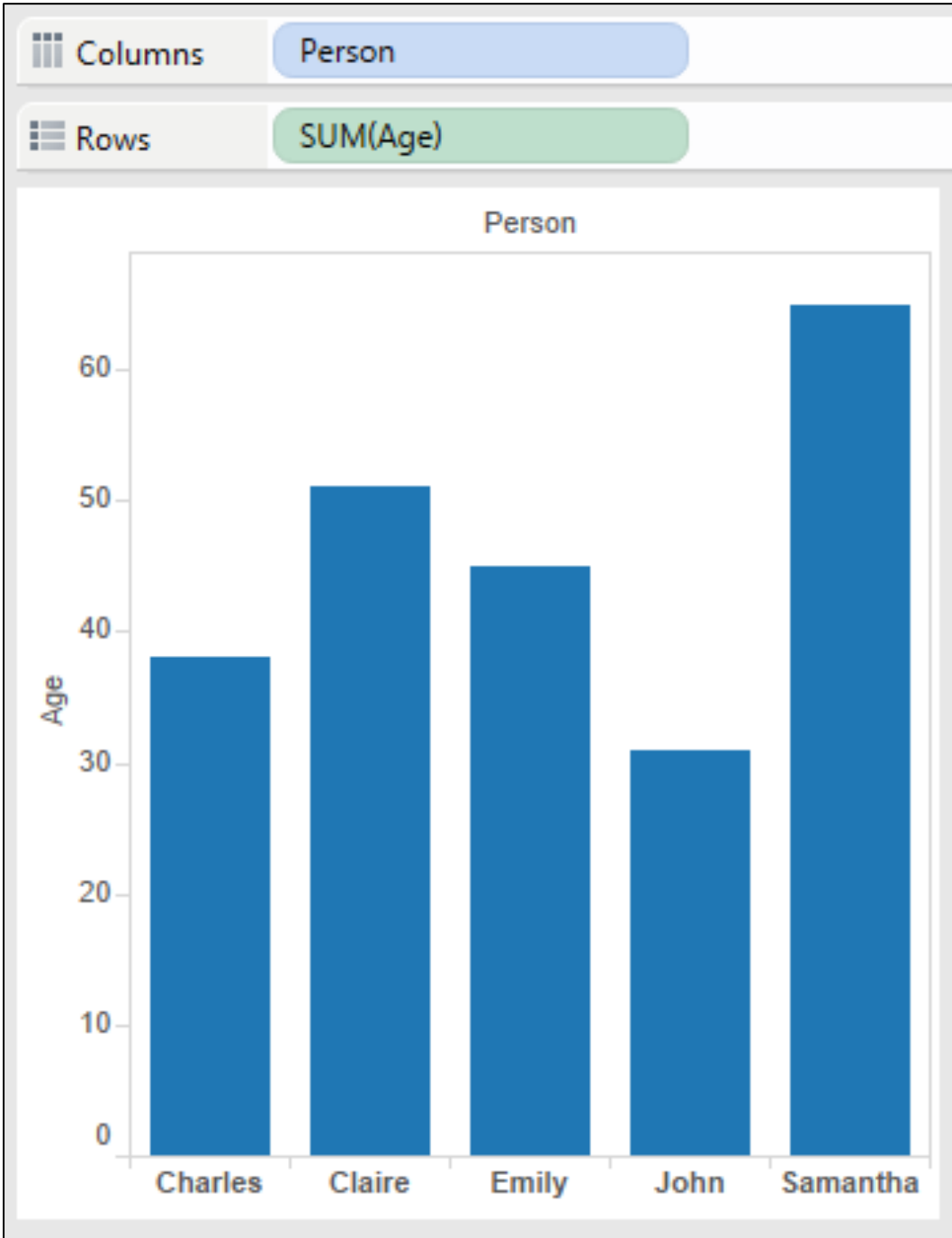
Placing a **categorical attribute** creates headers for the members of that category.



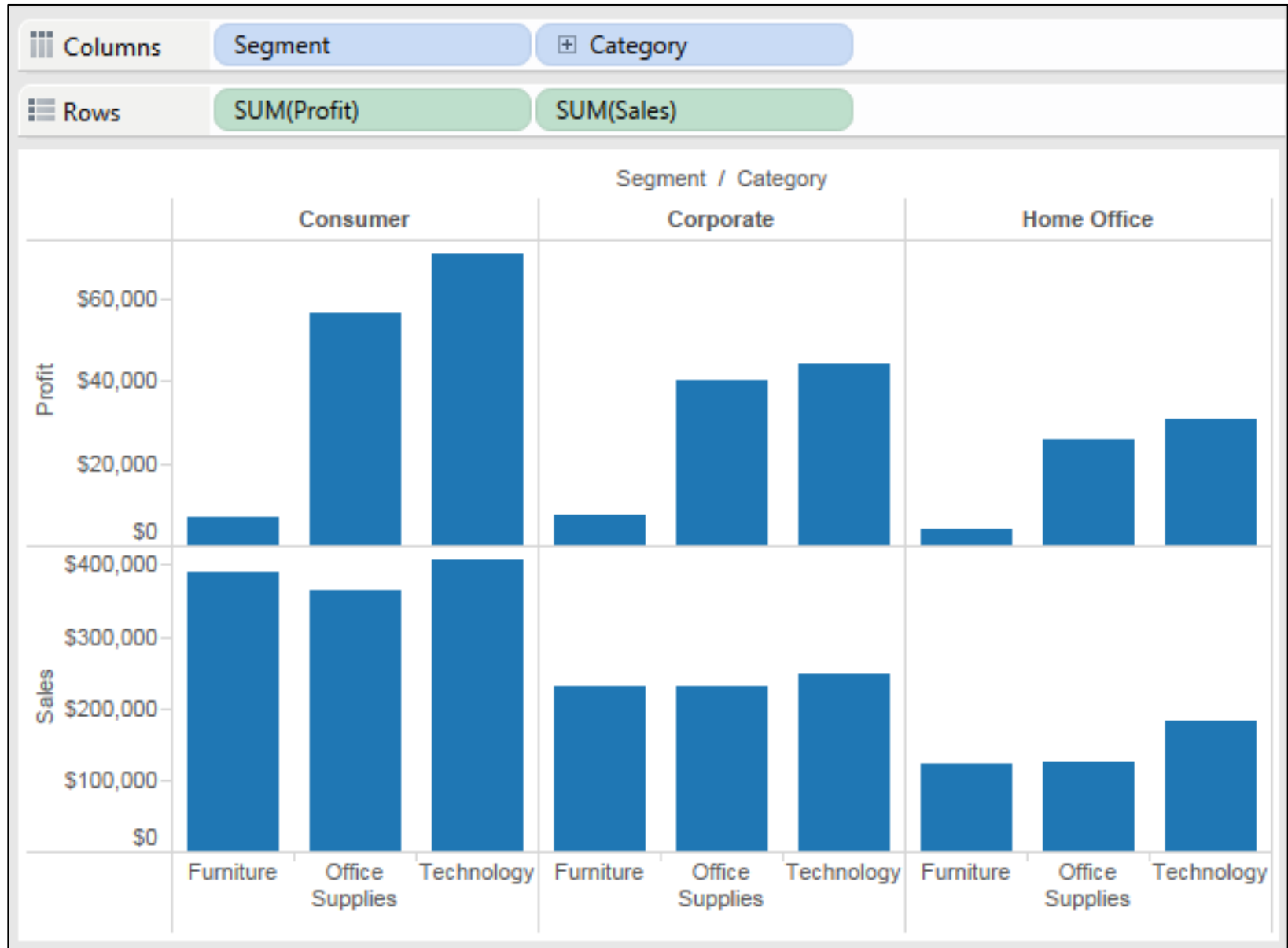
Placing **quantitative data** creates numeric axes

Example:

This view shows the members of the *Person* category as column headers, while the *Age* attribute is displayed as a vertical axis.

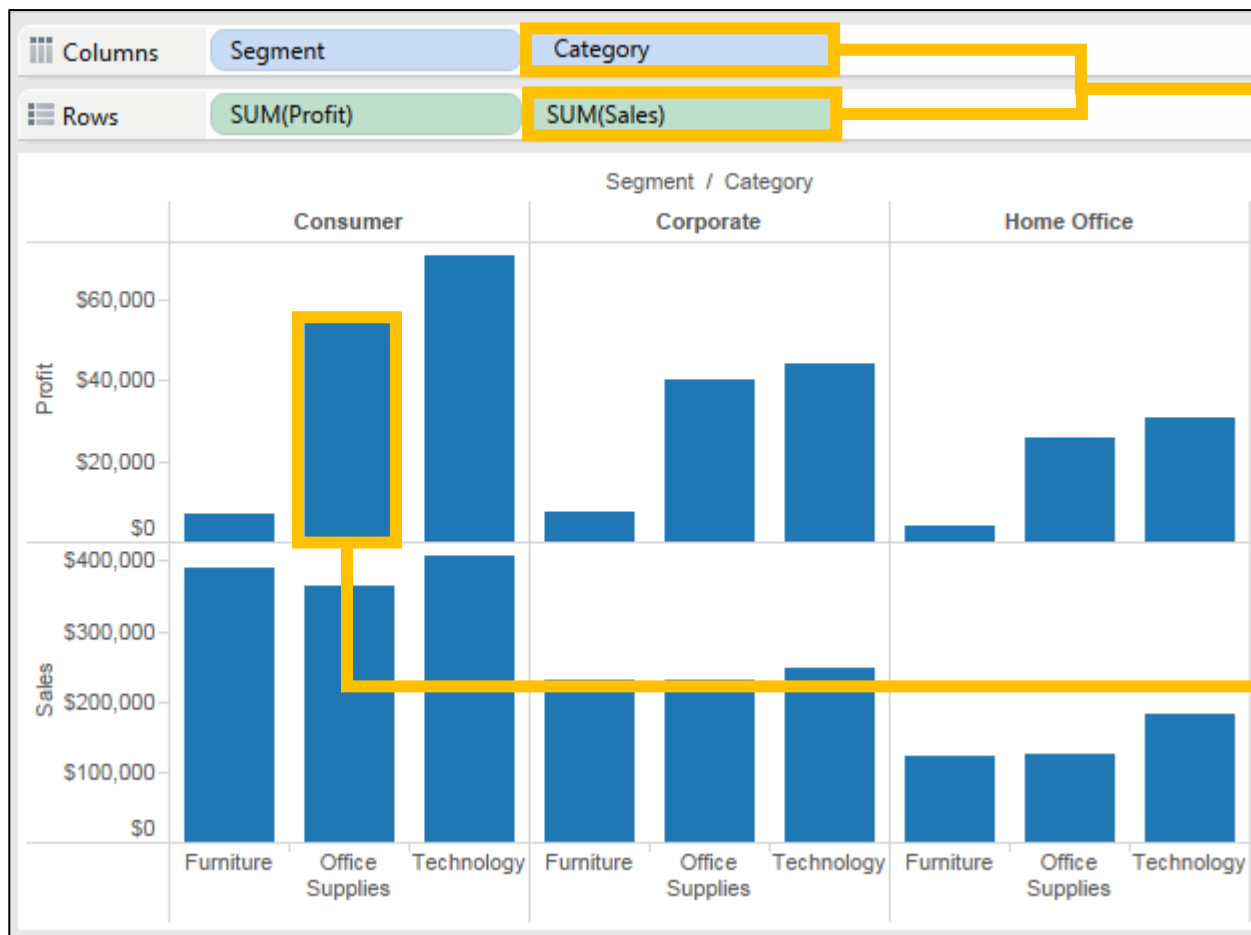


Adding more **attributes** to the *Rows* and *Columns* shelves adds more rows, columns, and panes to the table.



Marks

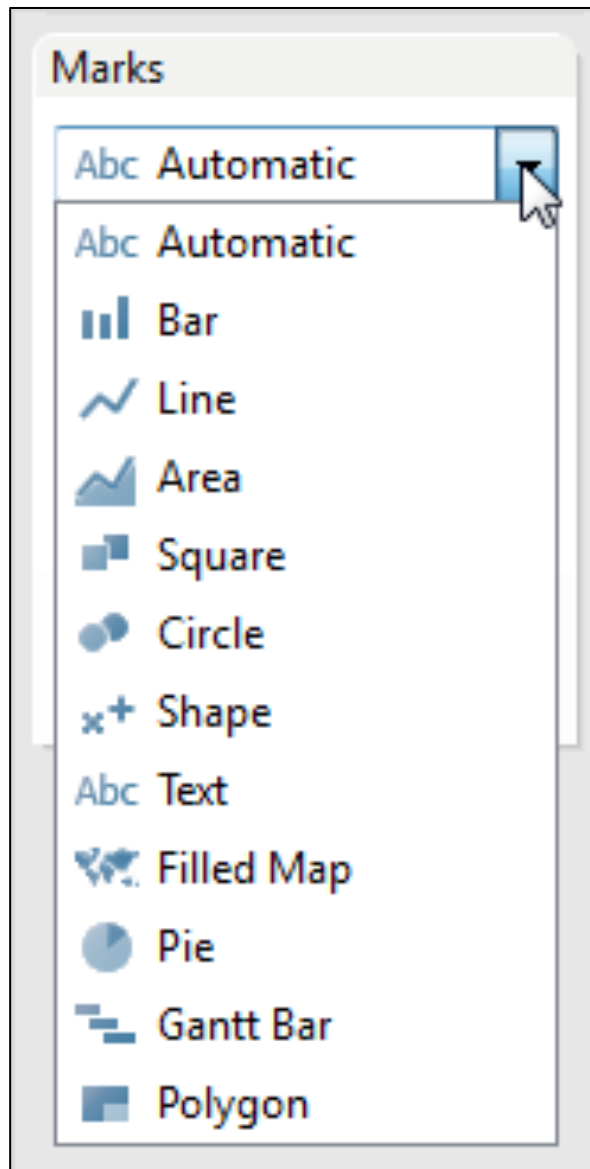
A mark is encodes the data point in the intersection of the dragged attributes. The inner attributes on the *Rows* and *Columns* shelves determine the **default mark type**.



Inner attributes

For example, if the inner attributes are a categorical and quantitative one, the **default mark type** is a bar.

Marks' Shape

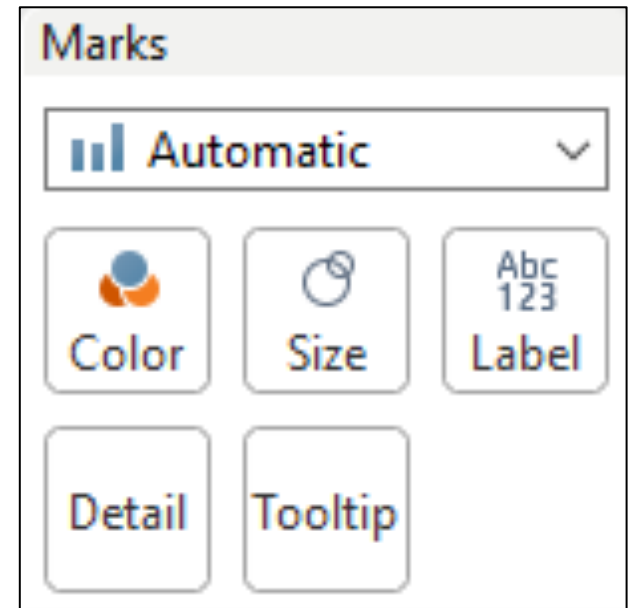


You can manually select a different mark type using the Marks card drop-down menu. This will set the mark's **shape property**.

Other Visual Properties

You can show additional information about the data using mark properties such as color, size, labels, etc.

Marks' properties are controlled by the *Marks* card. Here, you can drag attributes to the different visual properties.



Modifying the marks' shape

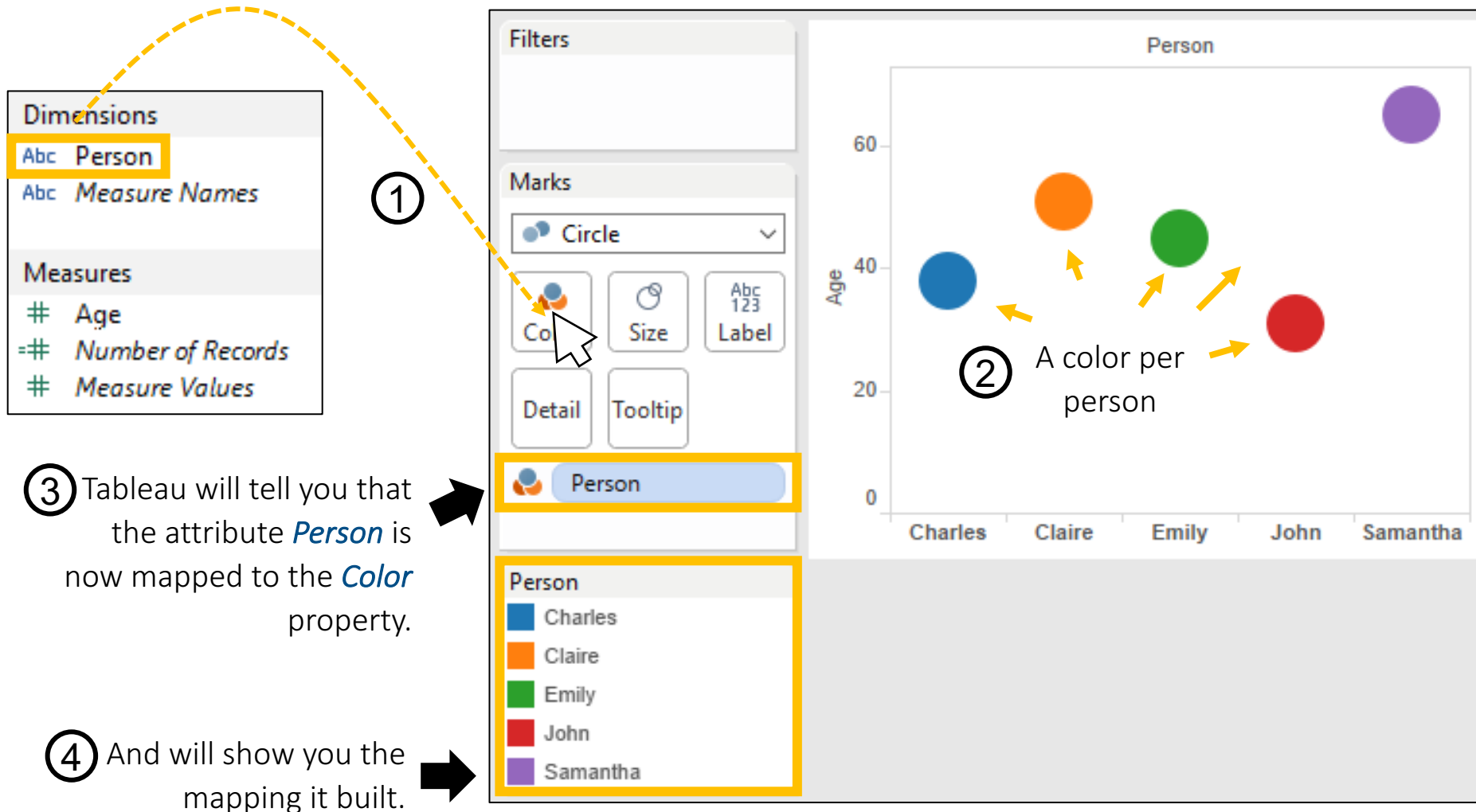
After changing the marks' type (shape) of our visualization, we end up with this:



Let's now *play* with other properties of this visualization's marks!

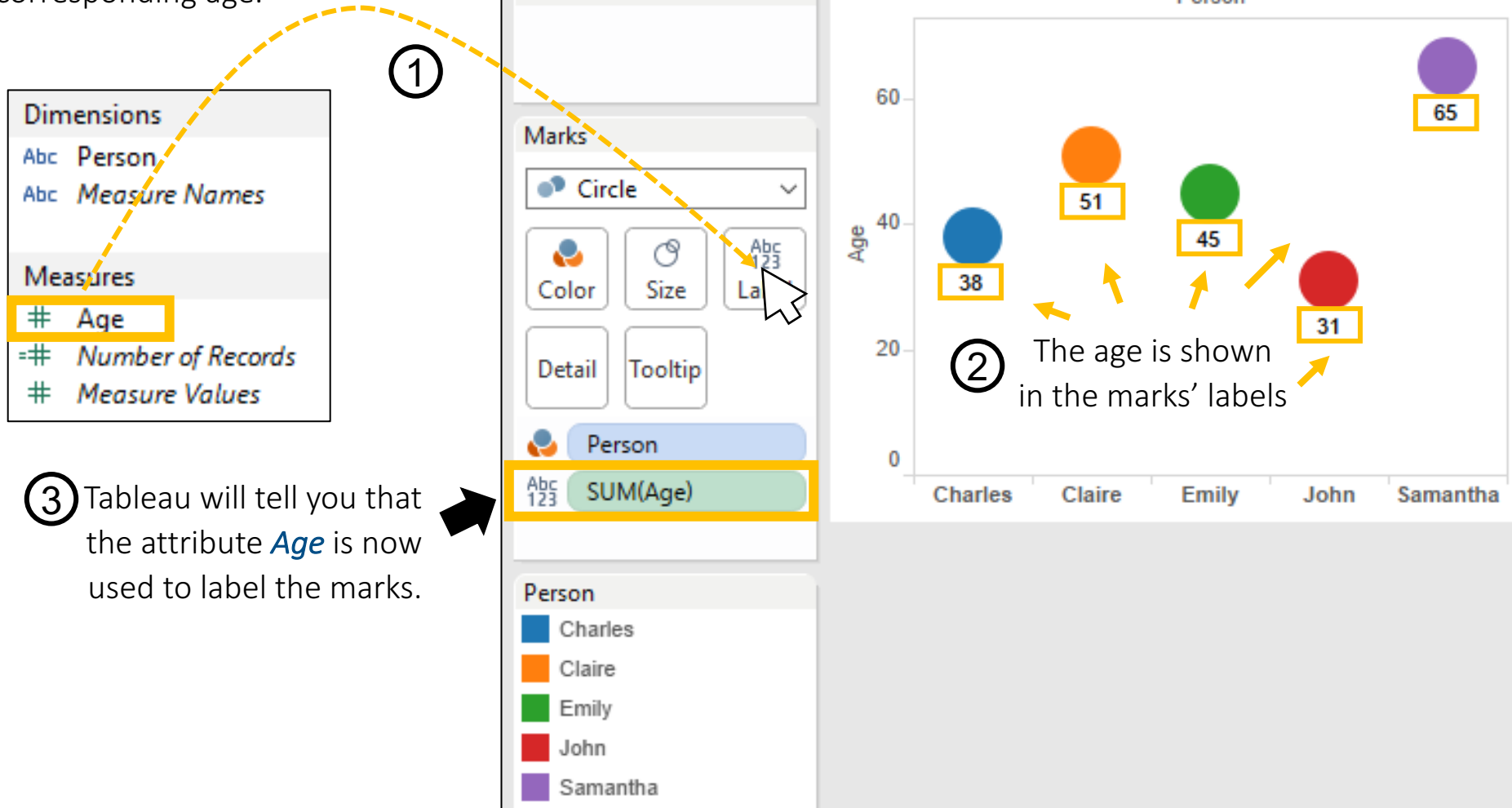
Coloring the marks

Dragging the *Person* attribute to the *Color* property will assign a different color for each person of the dataset.



Labelling the marks

Dragging the *Age* attribute to the *Label* property will label each mark of the visualization with the corresponding age.



The Show me Panel



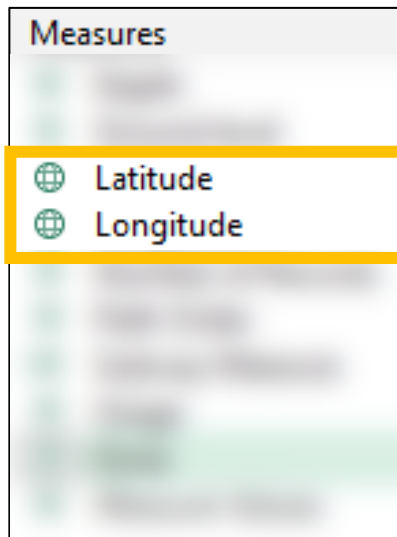
Provides suggestions to build visualizations based on the attributes you have already dropped.

Tableau automatically evaluates the selected attributes and suggests you several types of visualization that would be *“appropriate”* for those attributes.

Auto-generated Attributes

Sometimes, Tableau automatically creates attributes.

For example, when detecting geographic roles in your data (such as names of countries or cities), it associates each value in a field with a **latitude** and **longitude** values.



You can use these attributes as numeric values, for example, to place marks on top of maps.