

Introduction to Data Visualization with Tableau

Common charts and
dashboards



Hands-on schedule

01 First steps

06 Further opportunities

02 Common charts and
dashboards

05 Useful visualisations

03 Transform the **data**

04 Interactions



Agenda

1 Practice

- Practice the first steps

2 Create simple dashboards

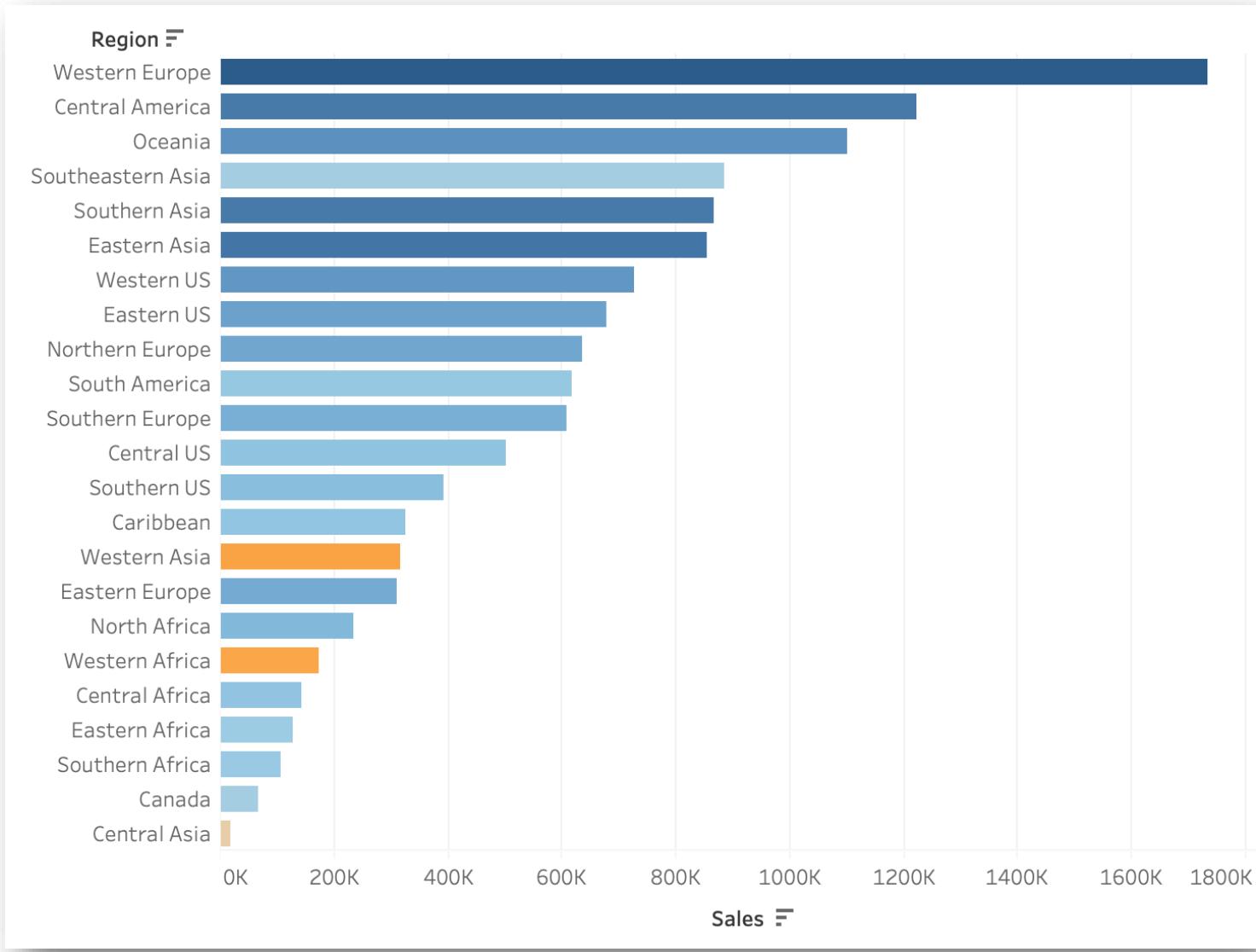
- Create custom hierarchy
- Dashboard layout options
- Dashboard filter
- Dashboard objects

Practice

Practice

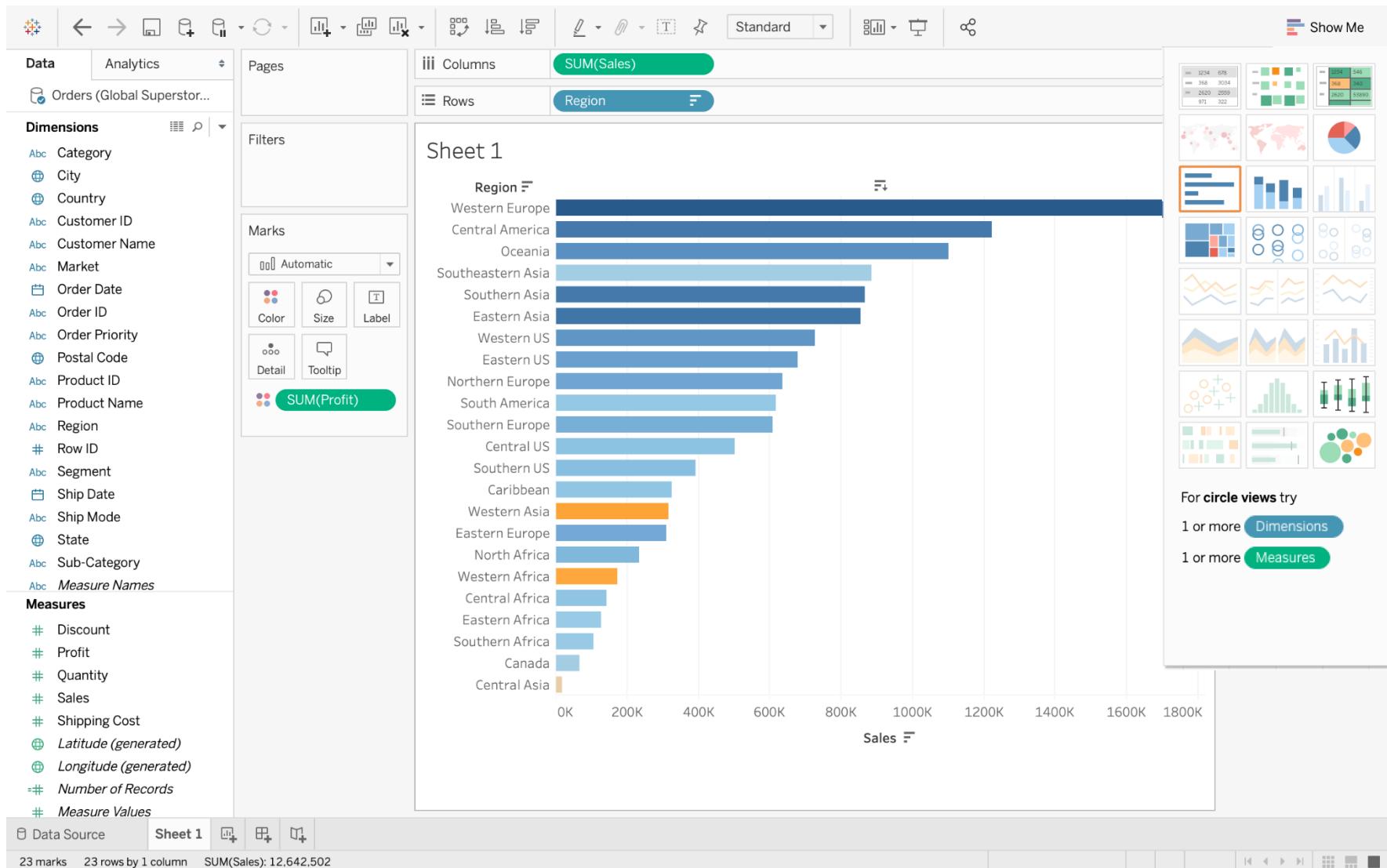
1. Bar chart

Practice



Region bar chart sorted by Sales and colored by Profit

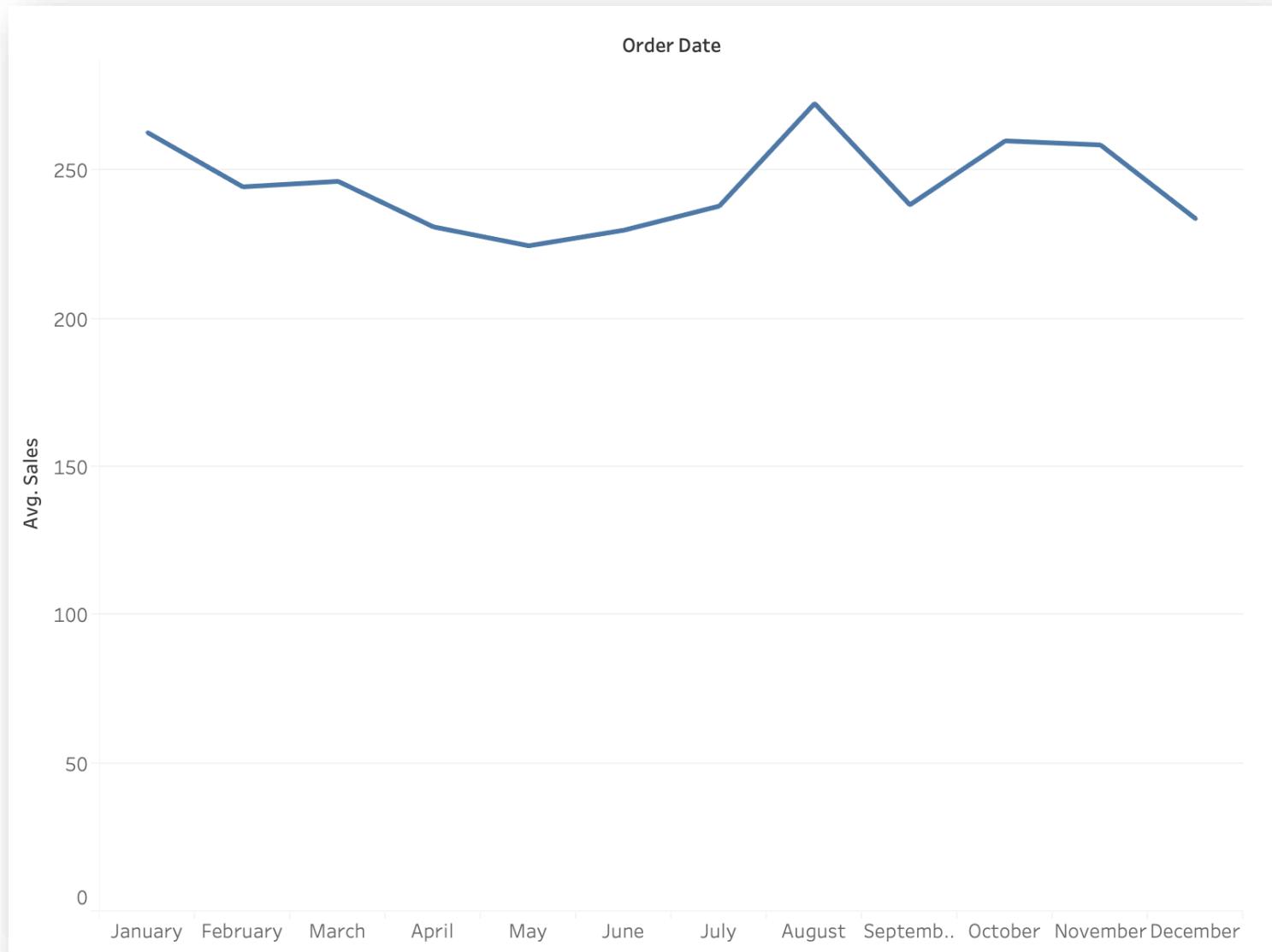
Practice



Region » Sales » Show Me » horizontal bars » Profit – Color » Sort descending

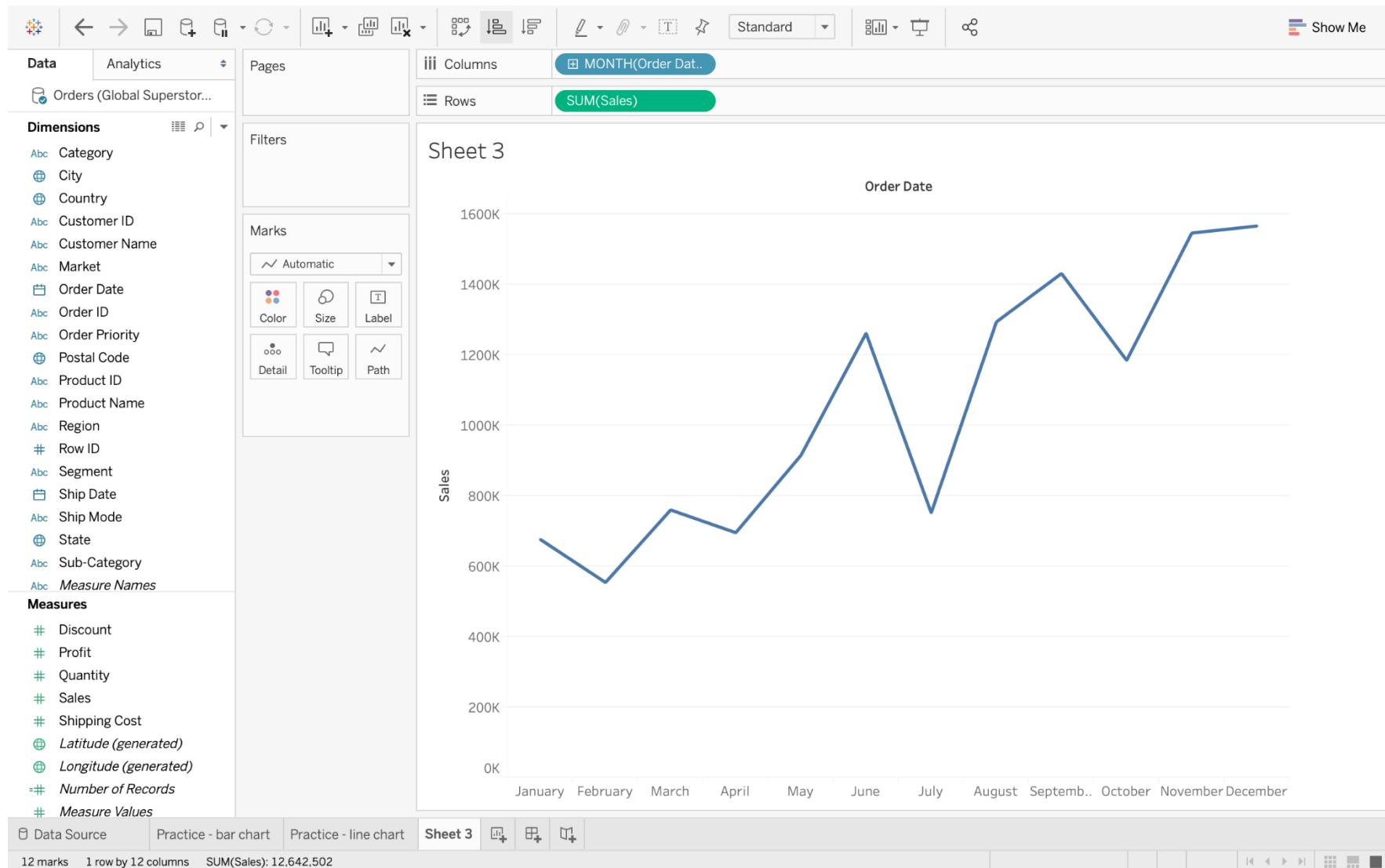
2. Line chart

Practice



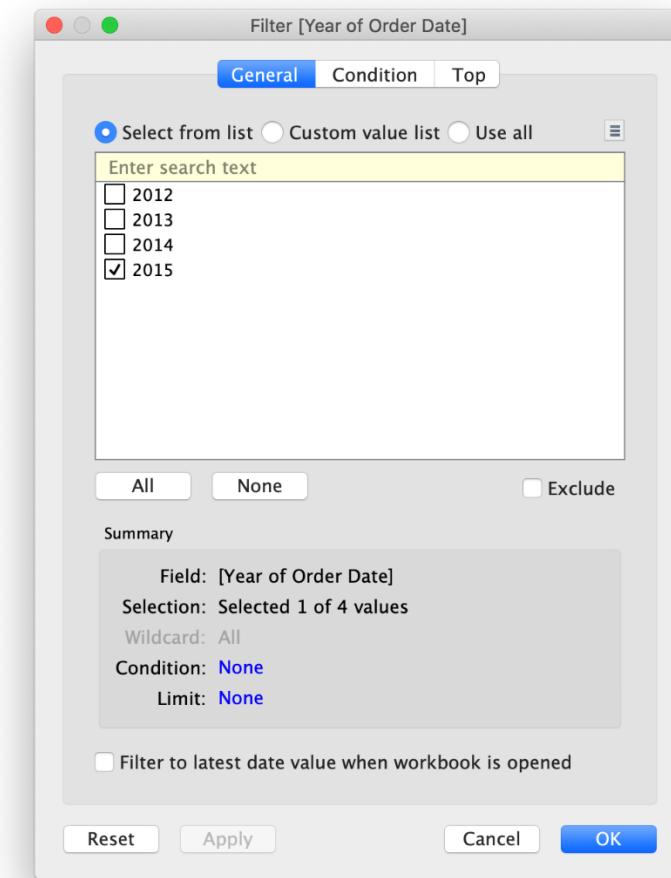
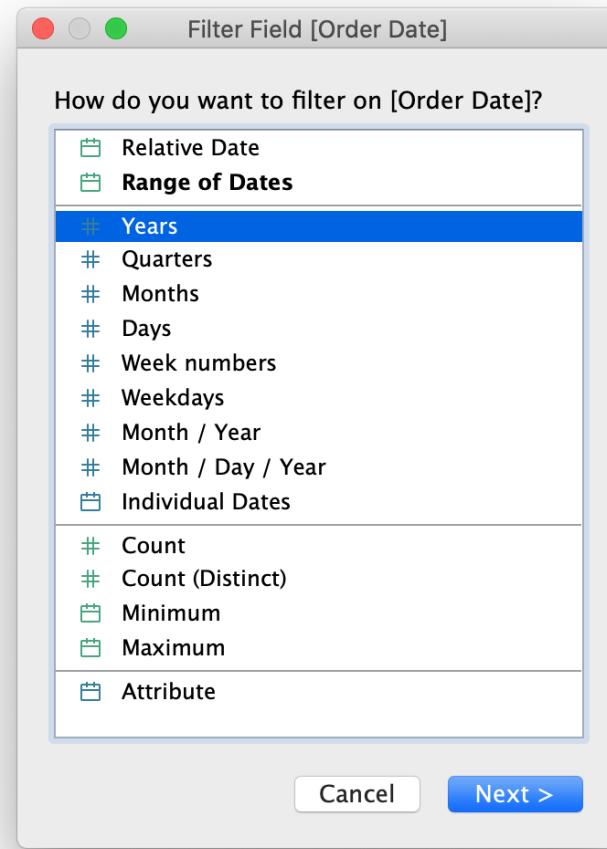
Which month was the highest in **average sales** the last year?

Practice



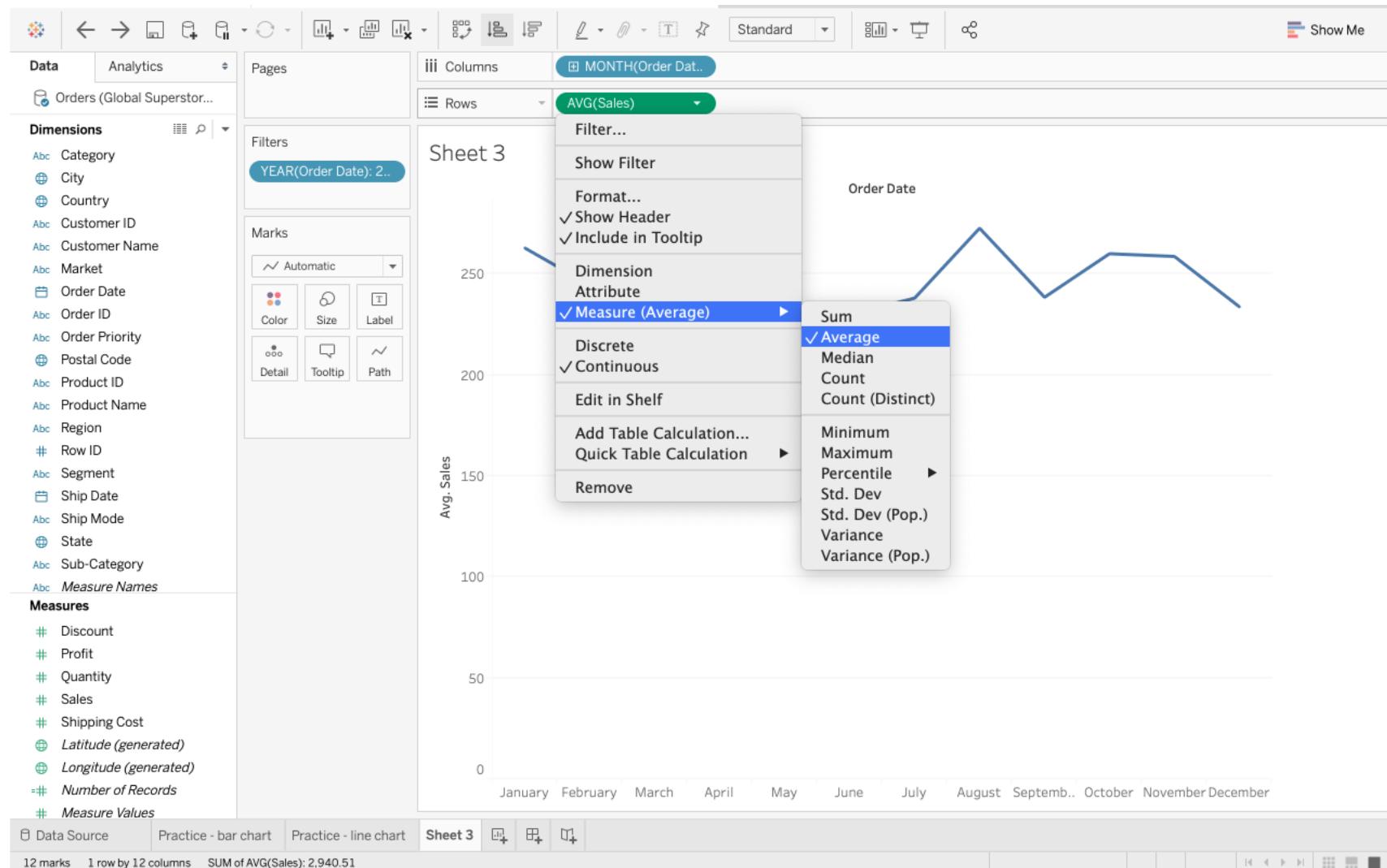
Order Date » Month » Sales » Show Me » Lines (discrete)

Practice



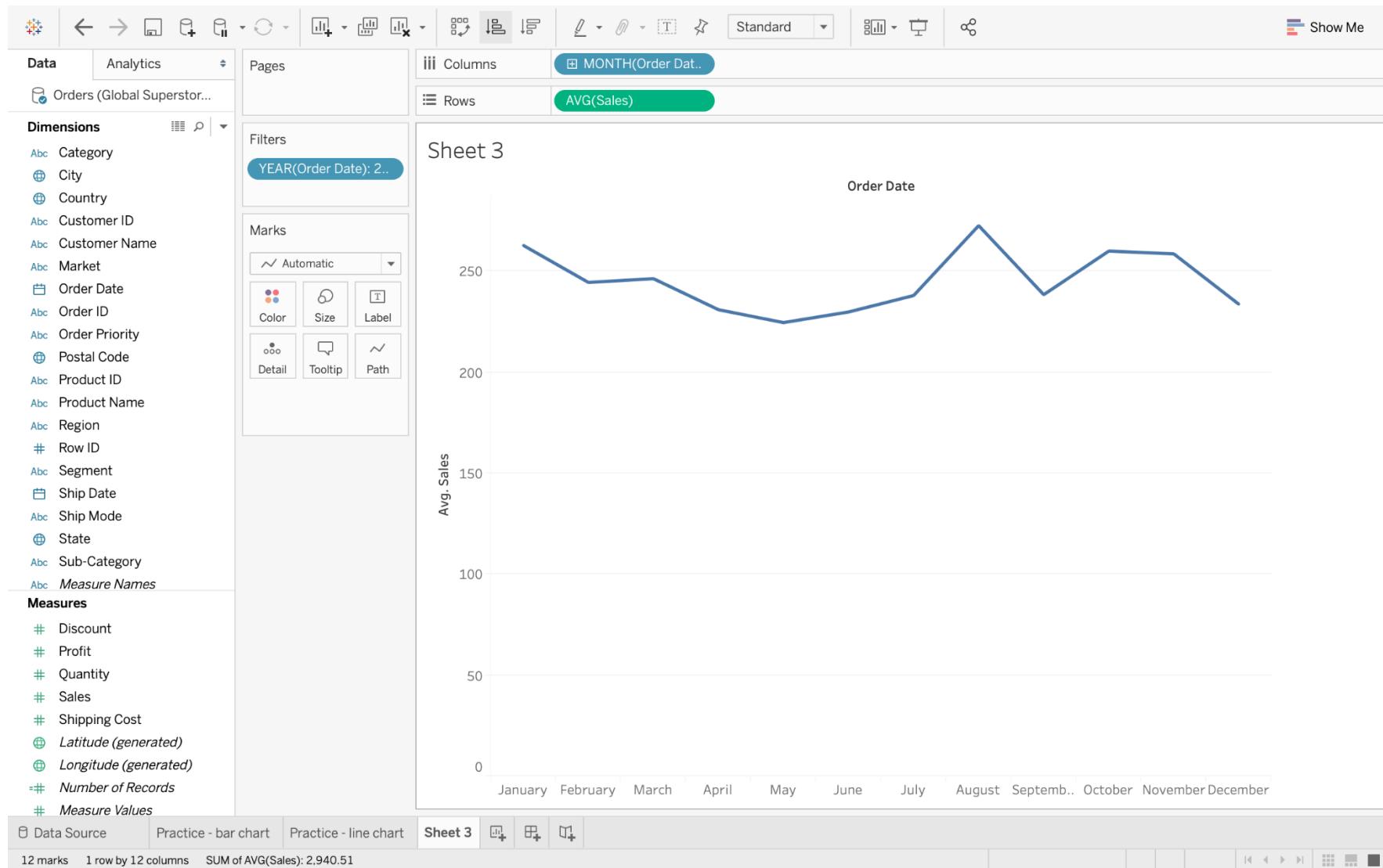
Order Date » Years » 2015

Practice



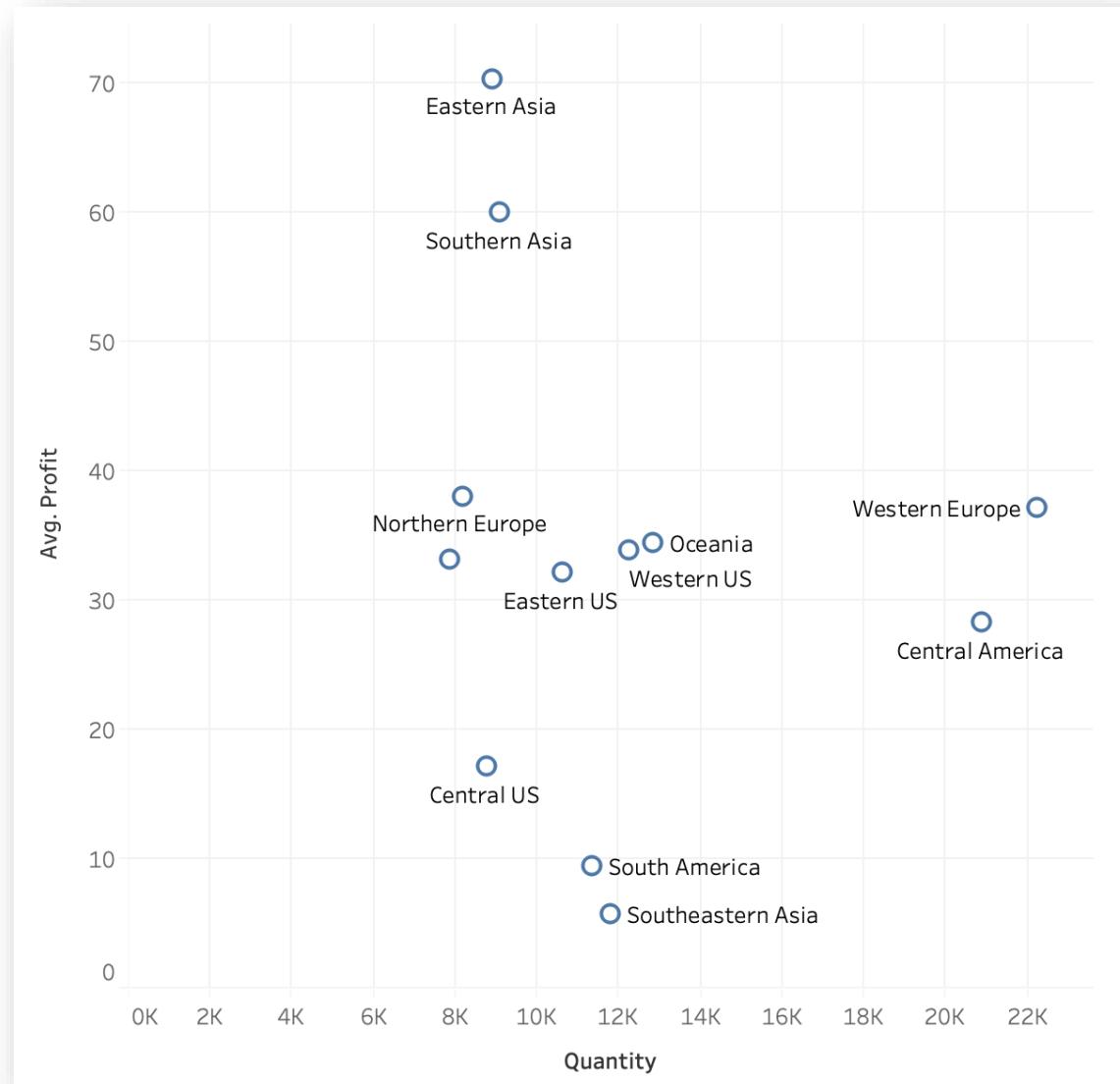
Sales » Average

Practice



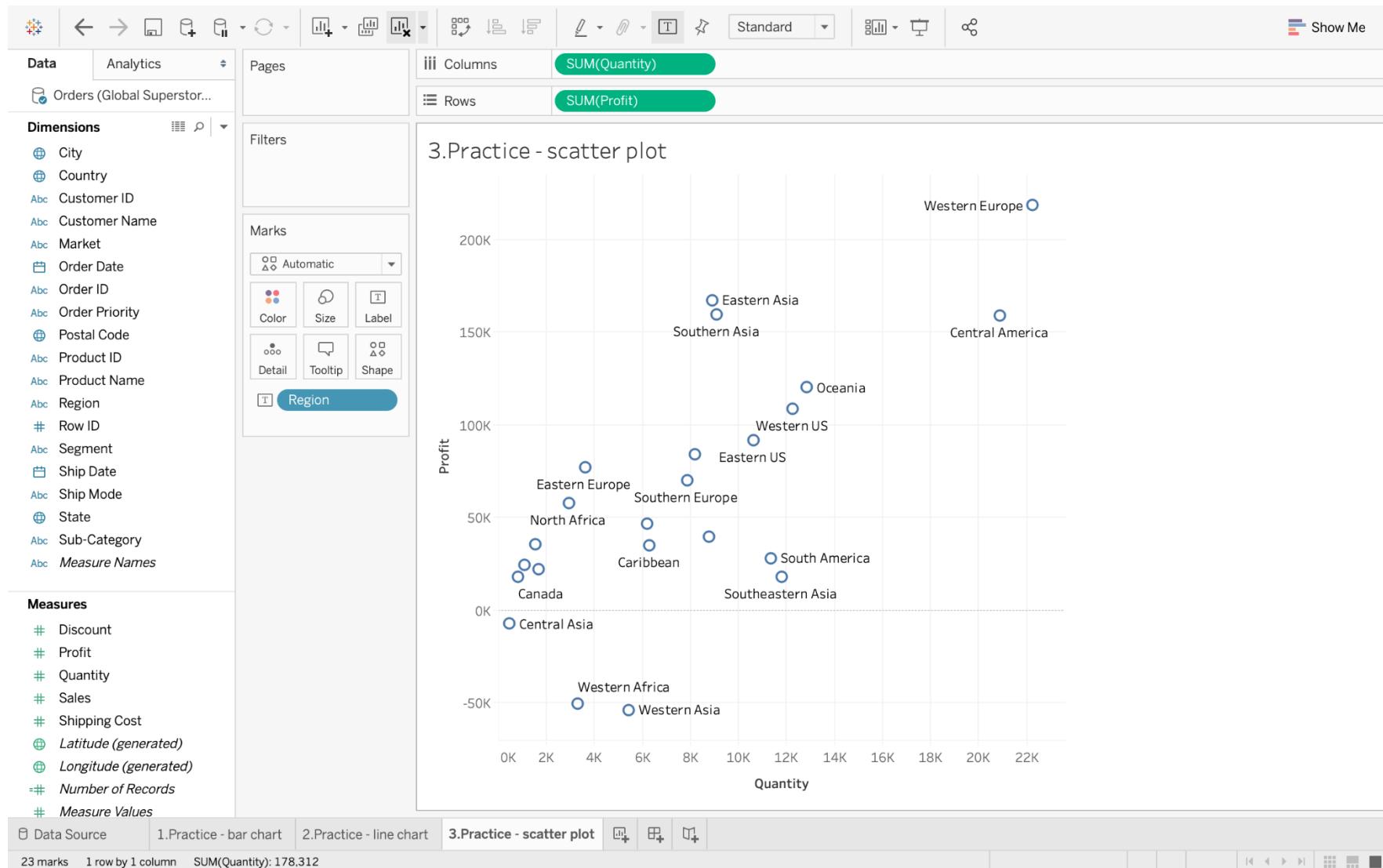
3. Scatter plot

Practice



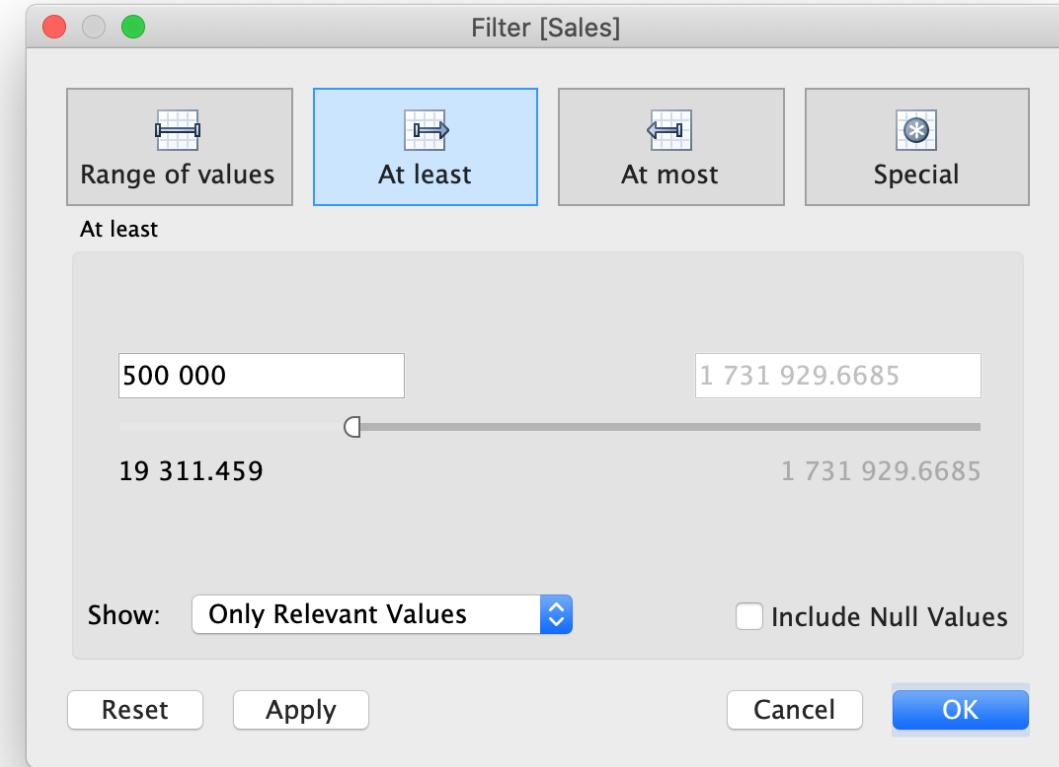
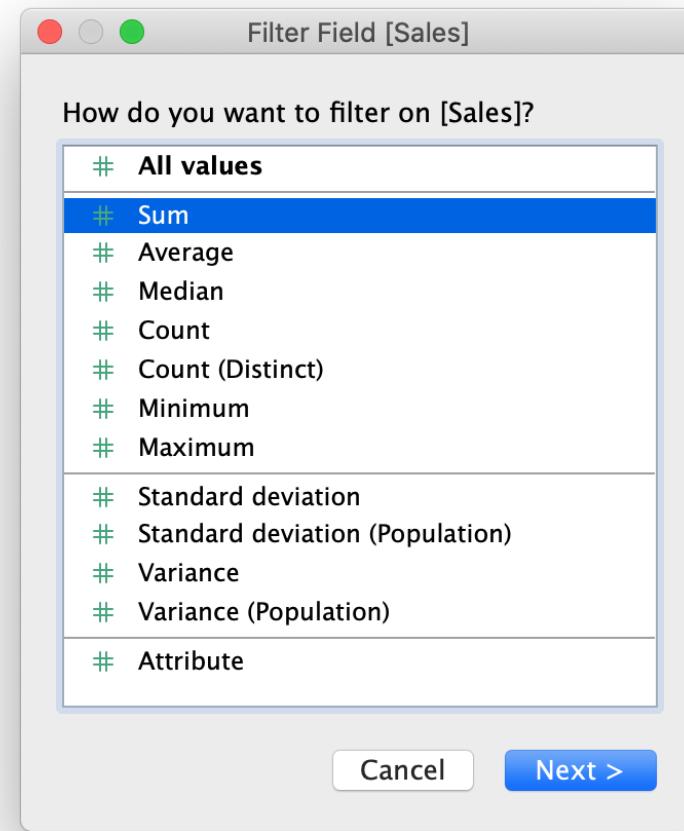
Does the company earn highest average **Profit** in **Regions** where the ordered **Quantity** is higher? Look at the regions where **Sales** went over 500.000 in the for years period.

Practice



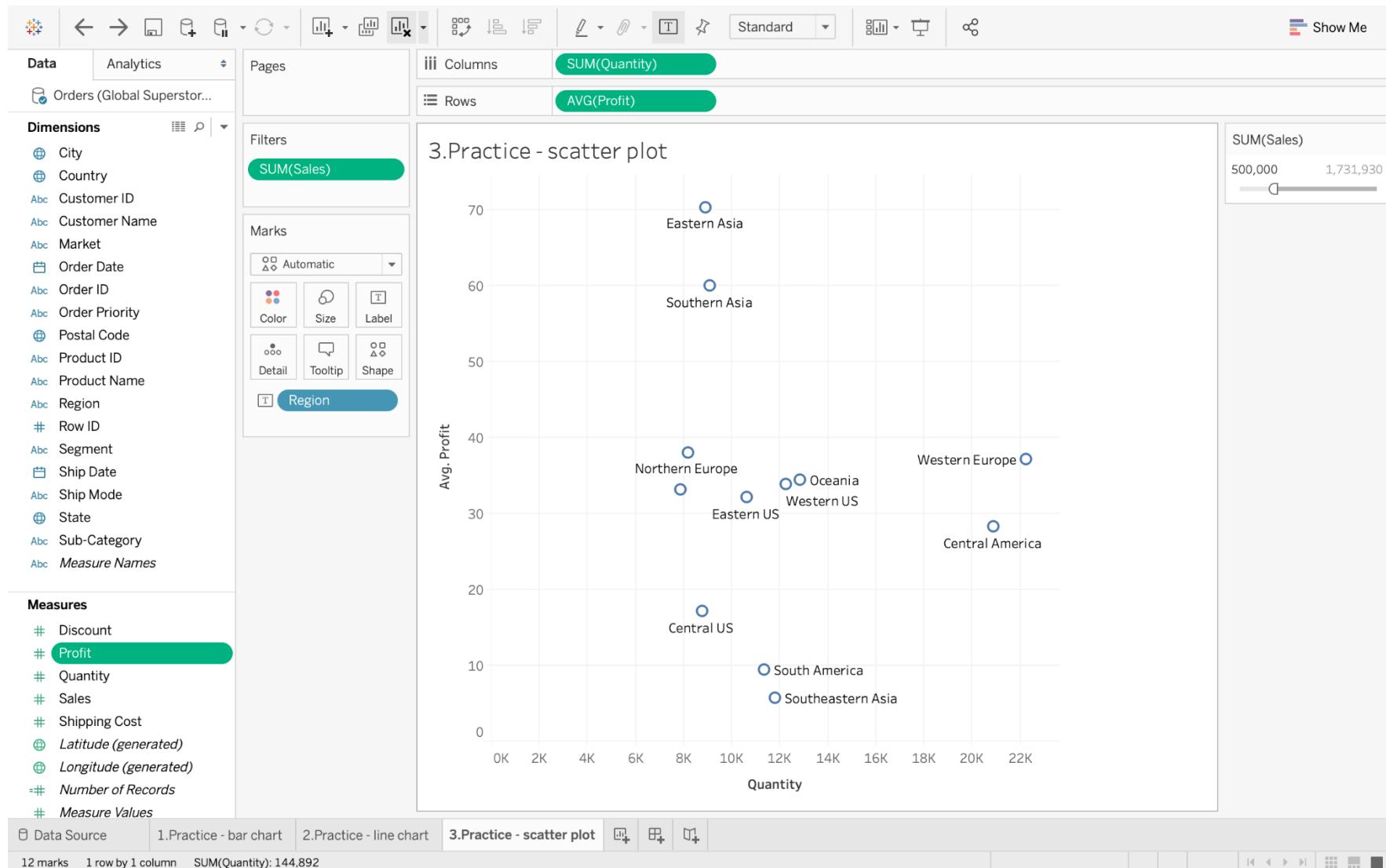
Profit » Quantity » Region (Text)

Practice



Sales Filter » At least 500 000

Practice

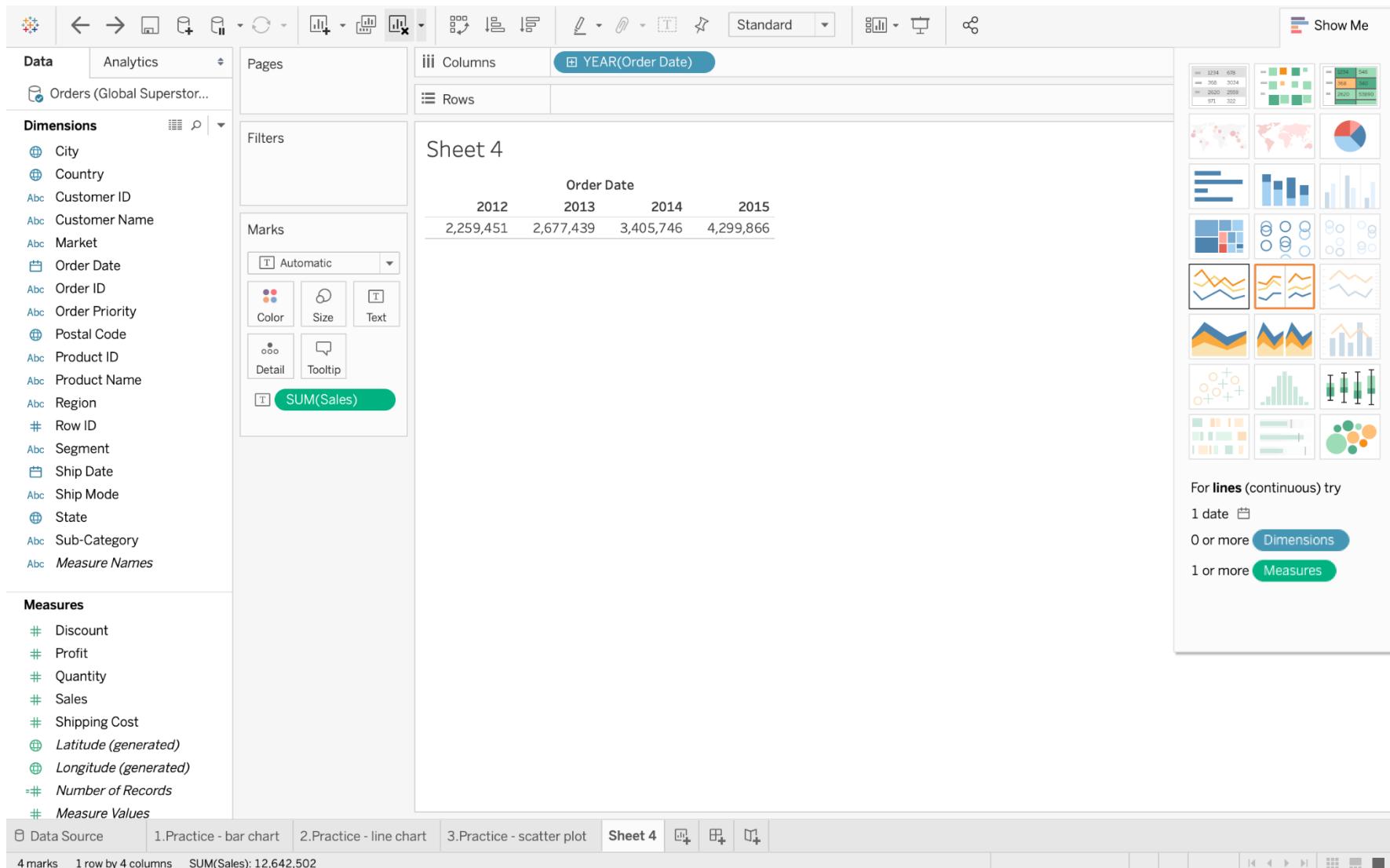


Profit » Average

Hierarchy

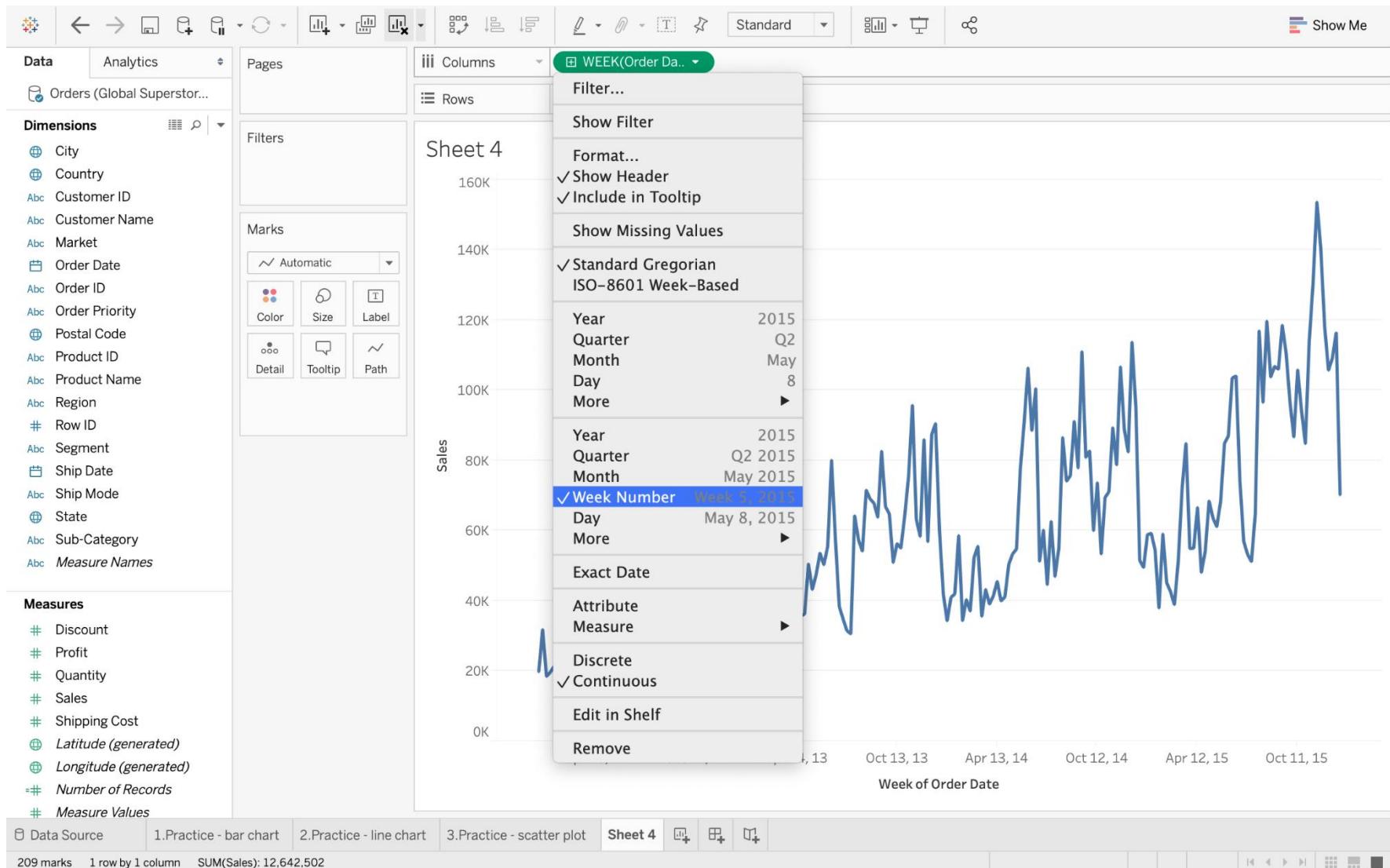
Date hierarchy

Date hierarchy



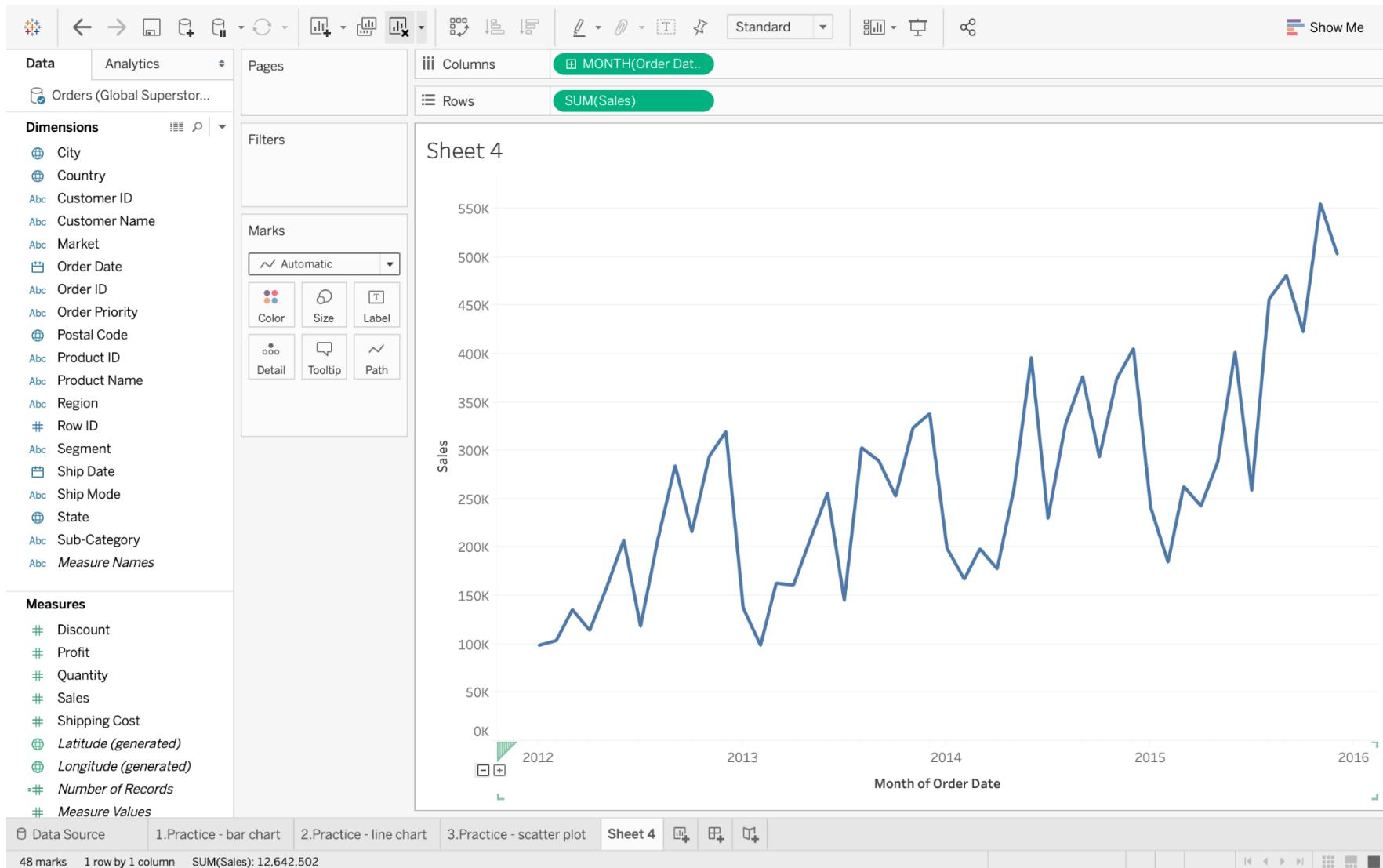
Order Date, Sales » Show Me » lines (continuous)

Date hierarchy



Date column can behave either discrete or continuous. Select the continuous week from the column's menu (**Week Number**).

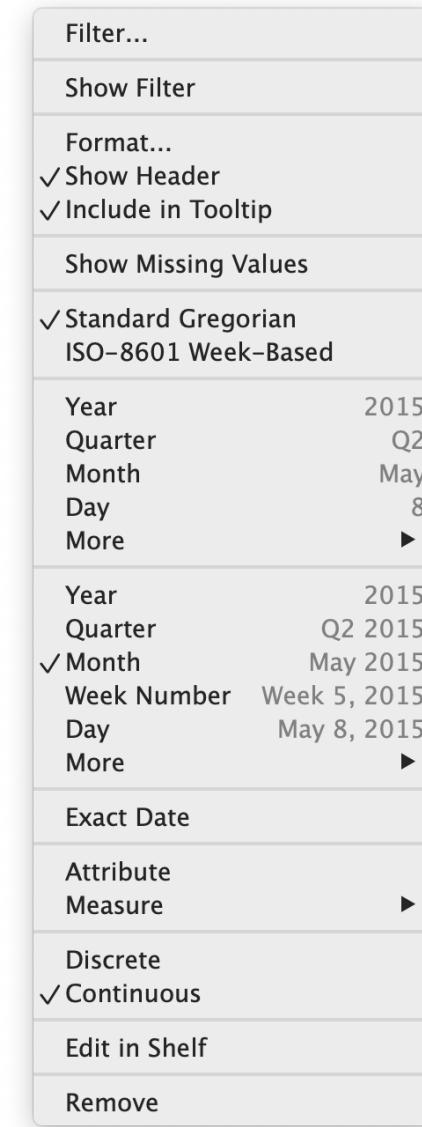
Date hierarchy



Instead of header labels, dates will be shown on a continuous axis.

Date hierarchy

1. Discrete date parts
2. Continuous date parts



Custom hierarchy

Custom hierarchy

- You can create custom hierarchies with any two or more columns

Dimensions

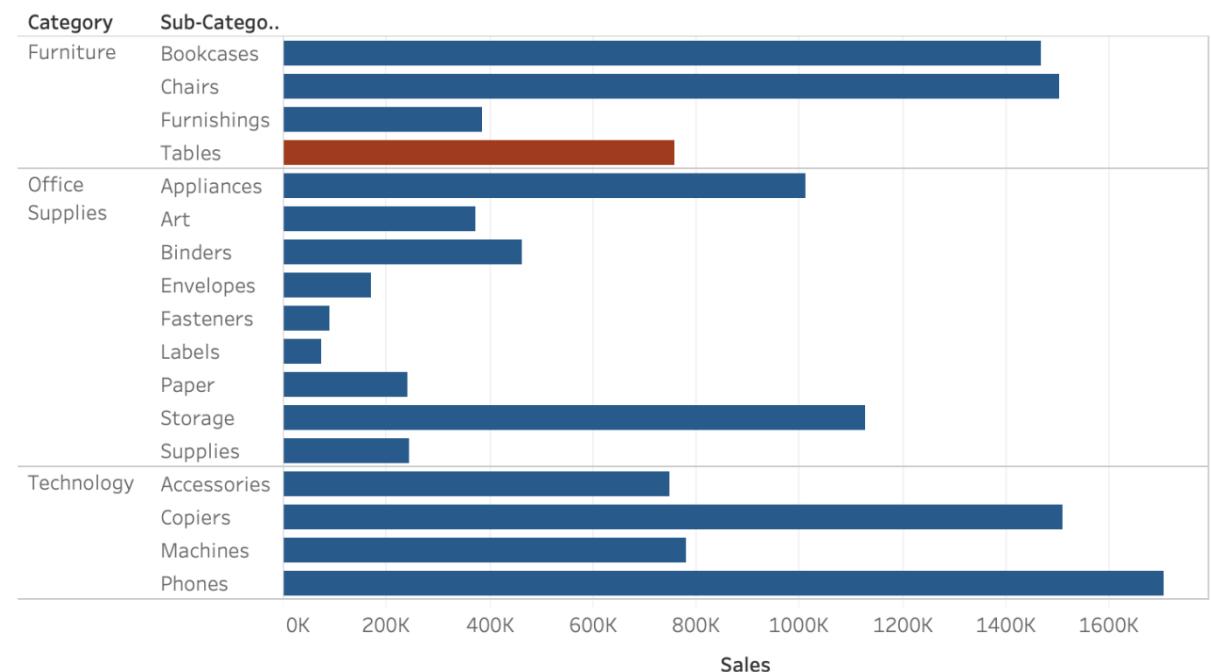
The screenshot shows a list of dimensions in a software interface. At the top right are icons for filter, search, and dropdown. Below is a list of dimensions with icons: Category, Sub-Category (highlighted in blue), Category, Sub-Category, City, Country, and Customer ID.

- ▼ Category, Sub-Category
- Category
- Sub-Category
- City
- Country
- Customer ID

Drag **Sub-Category** over **Category** and give a name to the hierarchy in the pop up window.

Custom hierarchy

Let's look at sales by sub-categories again. This time I'm interested in whether a sub-category is over or under zero in profit.



Custom hierarchy

The screenshot shows the Tableau Data Prep interface with the following components:

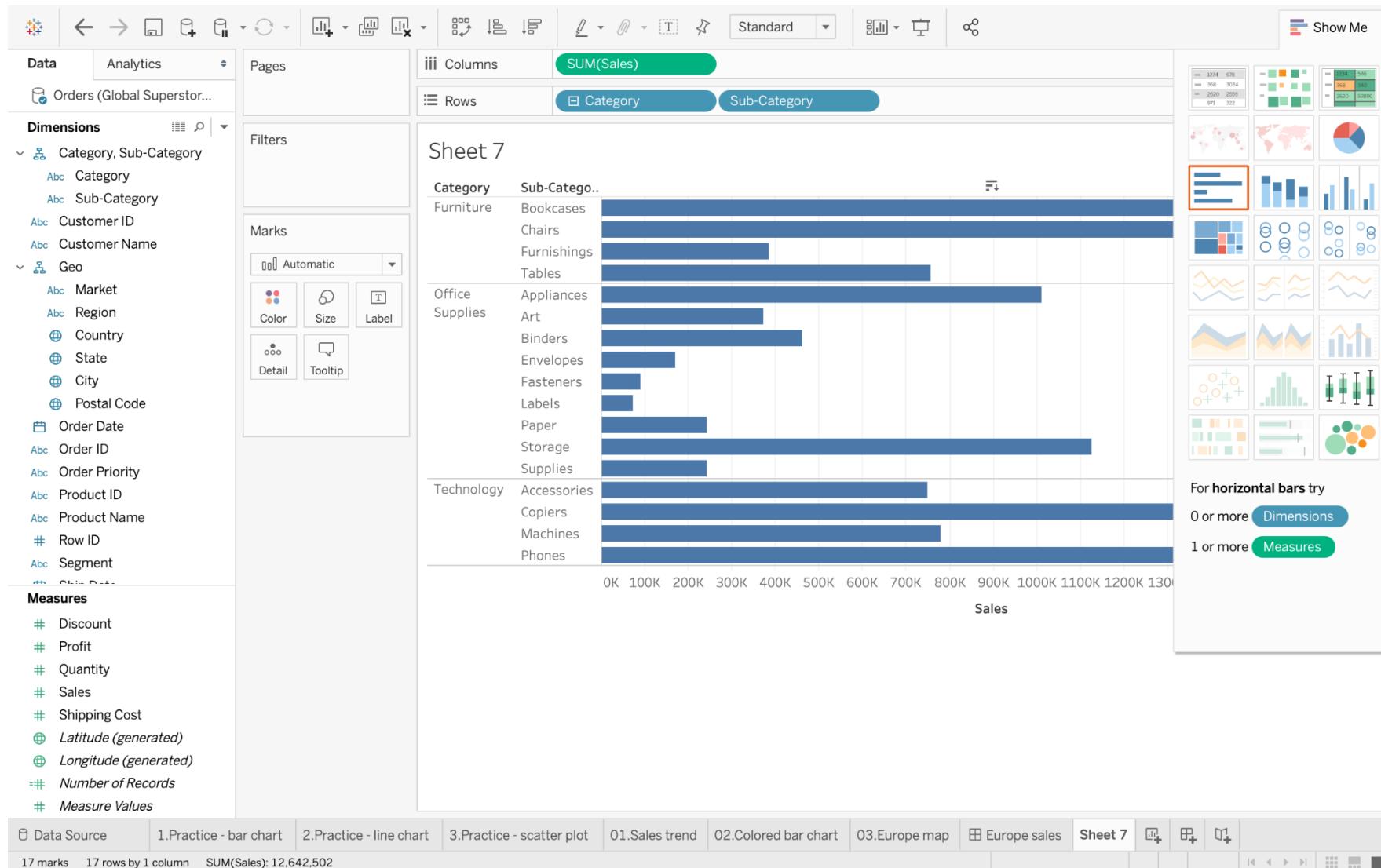
- Left Panel (Dimensions):**
 - Category, Sub-Category
 - Category
 - Sub-Category
 - Customer ID
 - Customer Name
 - Geo
 - Market
 - Region
 - Country
 - State
 - City
 - Postal Code
 - Order Date
 - Order ID
 - Order Priority
 - Product ID
 - Product Name
 - Row ID
 - Segment
 - Other Dims
- Marks:** Automatic, with options for Color, Size, Text, Detail, and Tooltip. A green button labeled "SUM(Sales)" is selected.
- Right Panel (Sheet 7):** A table titled "Sheet 7" showing sales data categorized by Category and Sub-Category. The data is as follows:

Category	Sub-Catego..	SUM(Sales)
Furniture	Bookcases	1,466,572
	Chairs	1,501,682
	Furnishings	385,156
	Tables	757,042
Office Supplies	Appliances	1,010,536
	Art	371,613
	Binders	461,869
	Envelopes	169,217
	Fasteners	89,495
	Labels	73,350
	Paper	241,788
	Storage	1,126,813
	Supplies	242,811
Technology	Accessories	749,237
	Copiers	1,509,436
	Machines	779,060
	Phones	1,706,824

At the bottom, the status bar shows: 17 marks 17 rows by 1 column SUM(Sales): 12,642,502

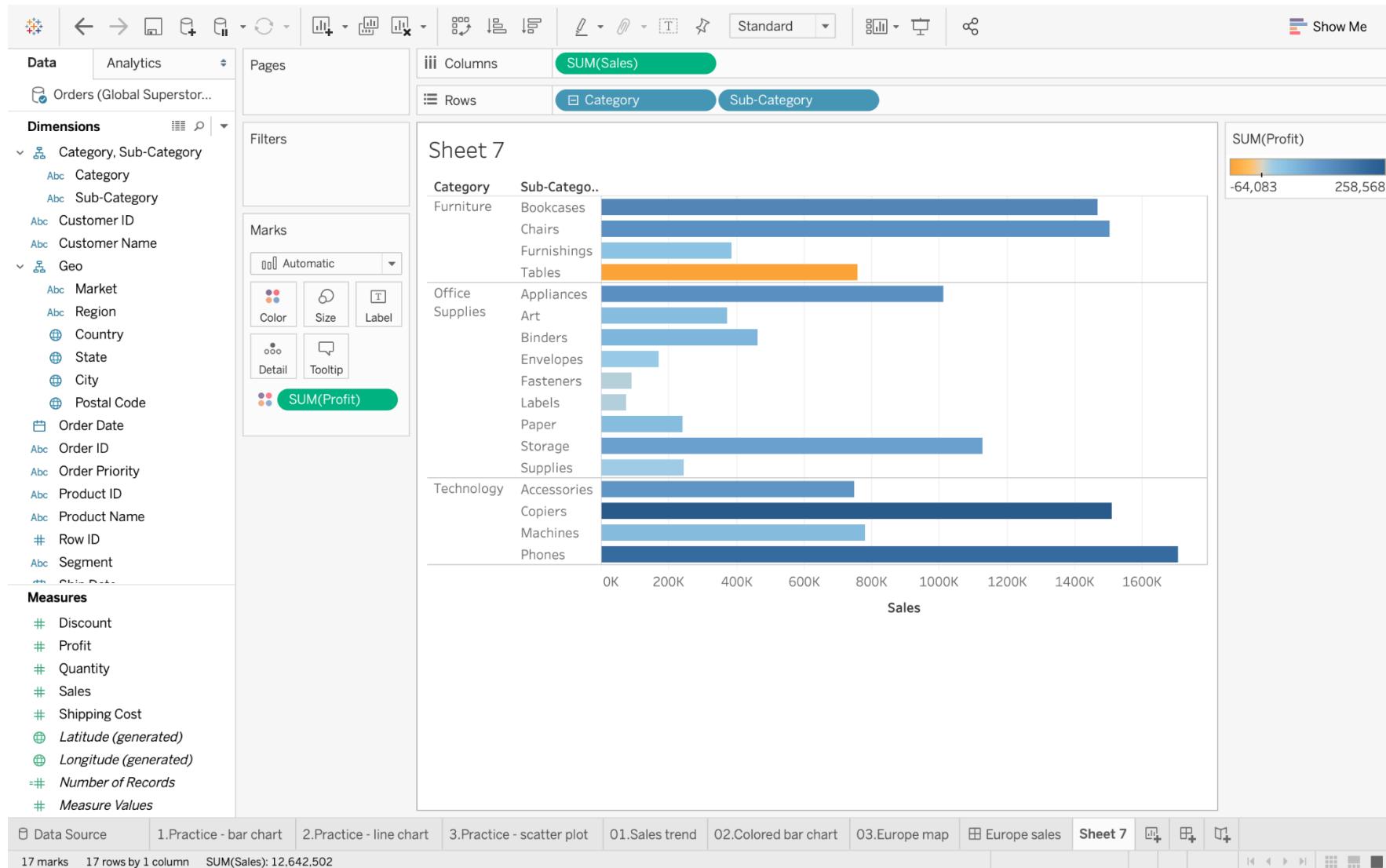
Category, Sub-Category, Sales

Custom hierarchy



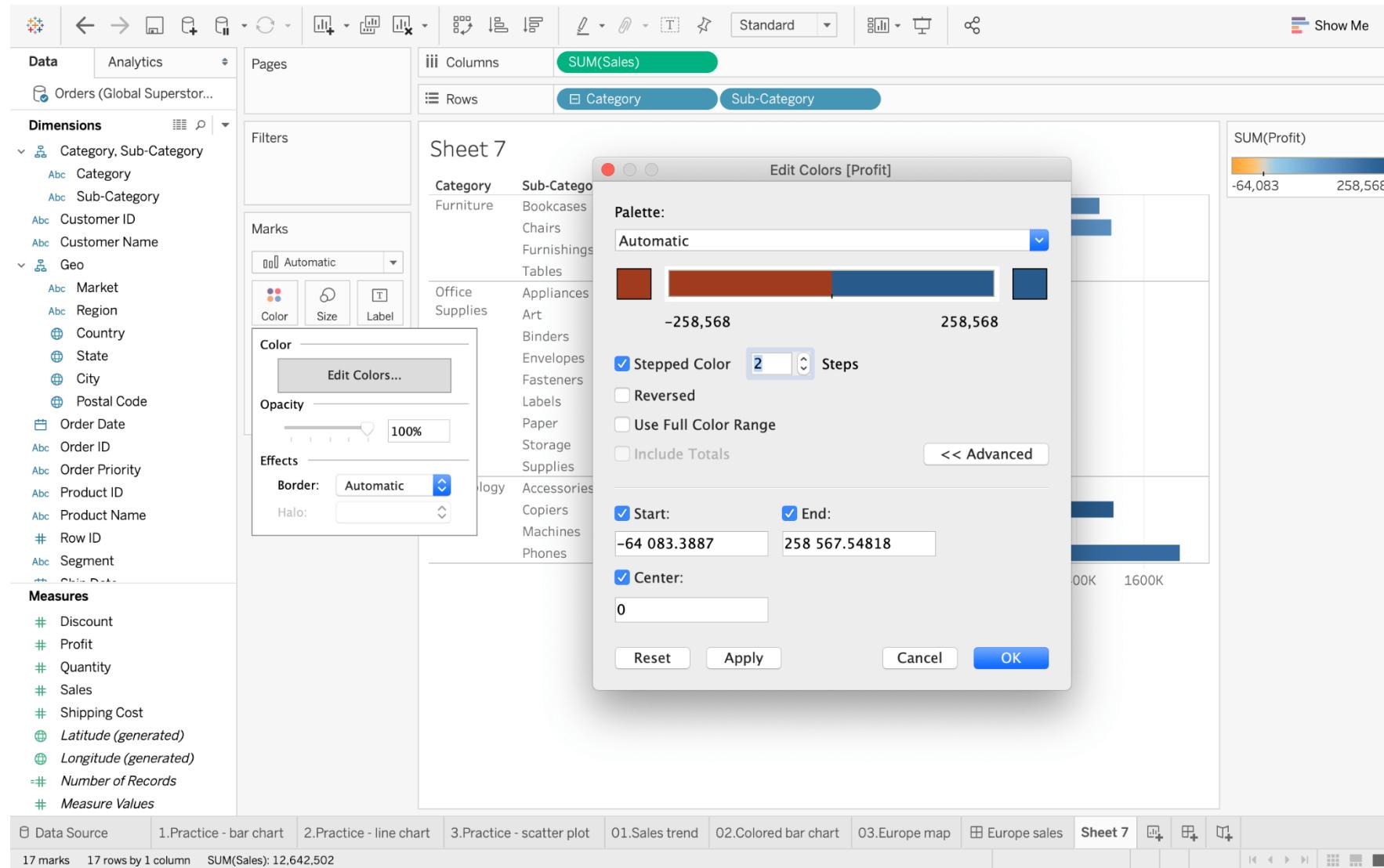
Show Me » Horizontal bars

Custom hierarchy



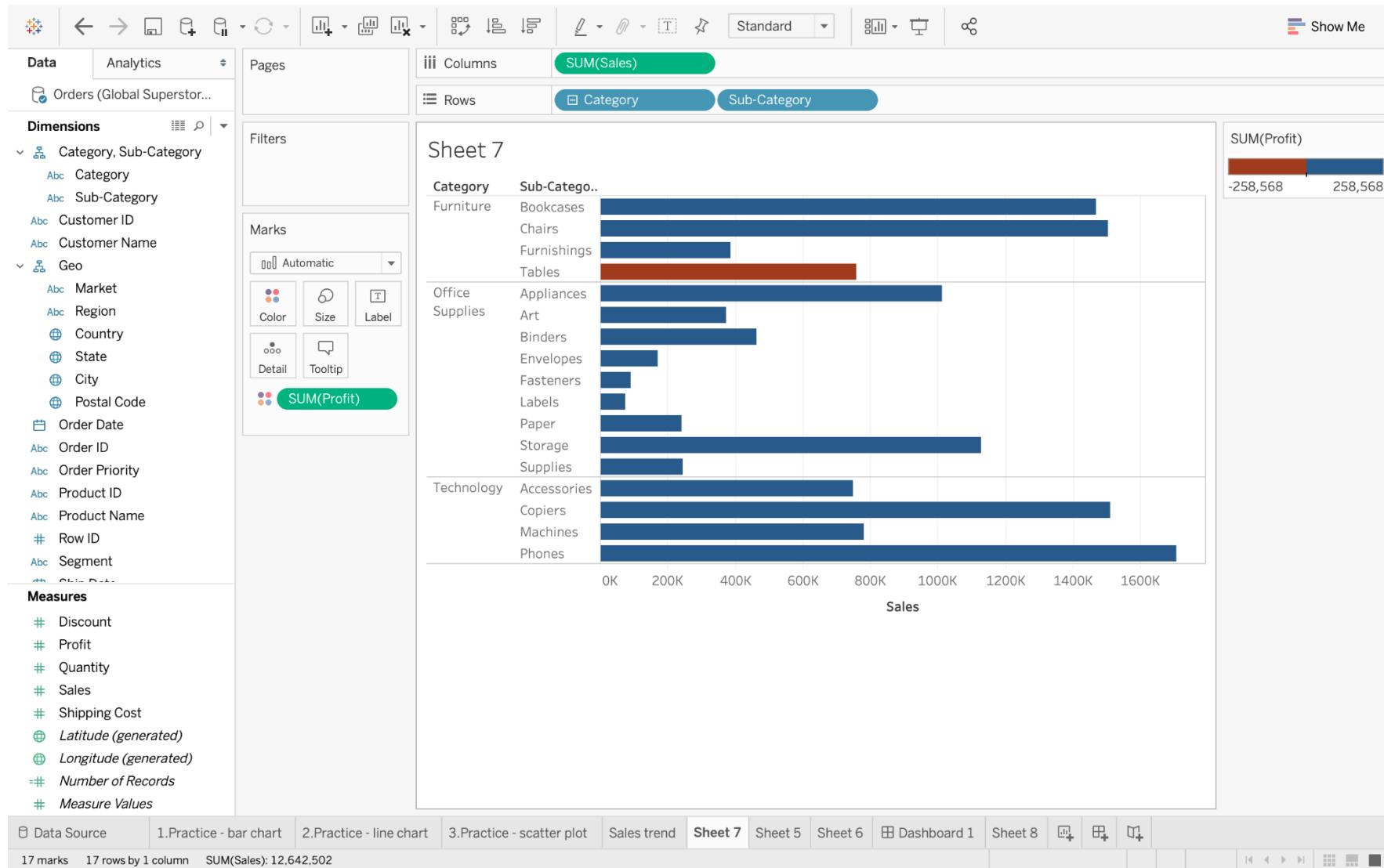
Profit » Color

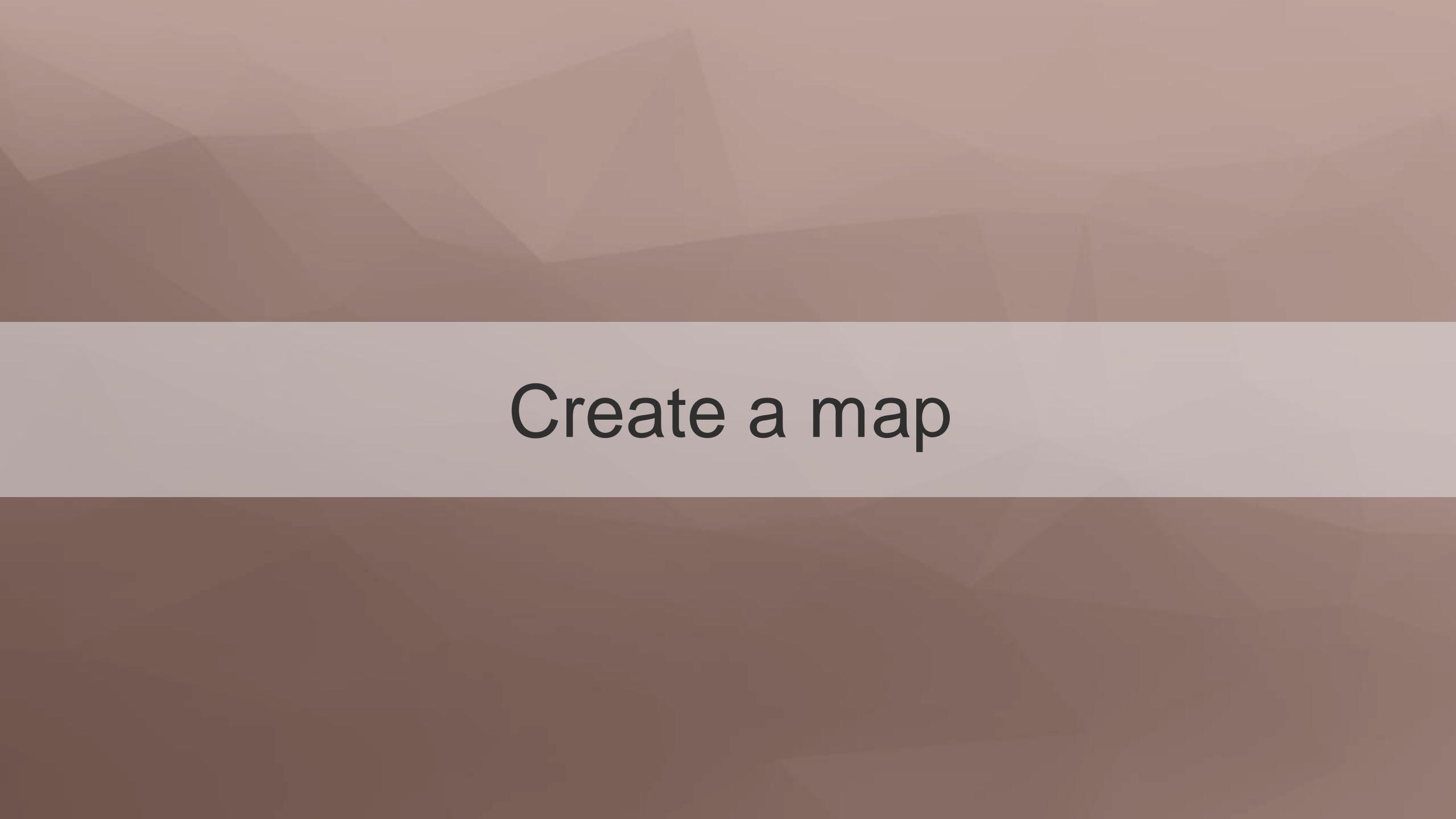
Custom hierarchy



Edit Colors... » Stepped Color = 2 Steps » Advanced Start, End, Center

Custom hierarchy





Create a map

Custom geographic hierarchy

- Market
- Region
- Country
- State
- City
- Postal Code

Dimensions	
Abc	Category
Abc	Customer ID
Abc	Customer Name
▼	Geo
Abc	Market
Abc	Region
🌐	Country
🌐	State
🌐	City
🌐	Postal Code
📅	Order Date
Abc	Order ID
Abc	Order Priority

Map

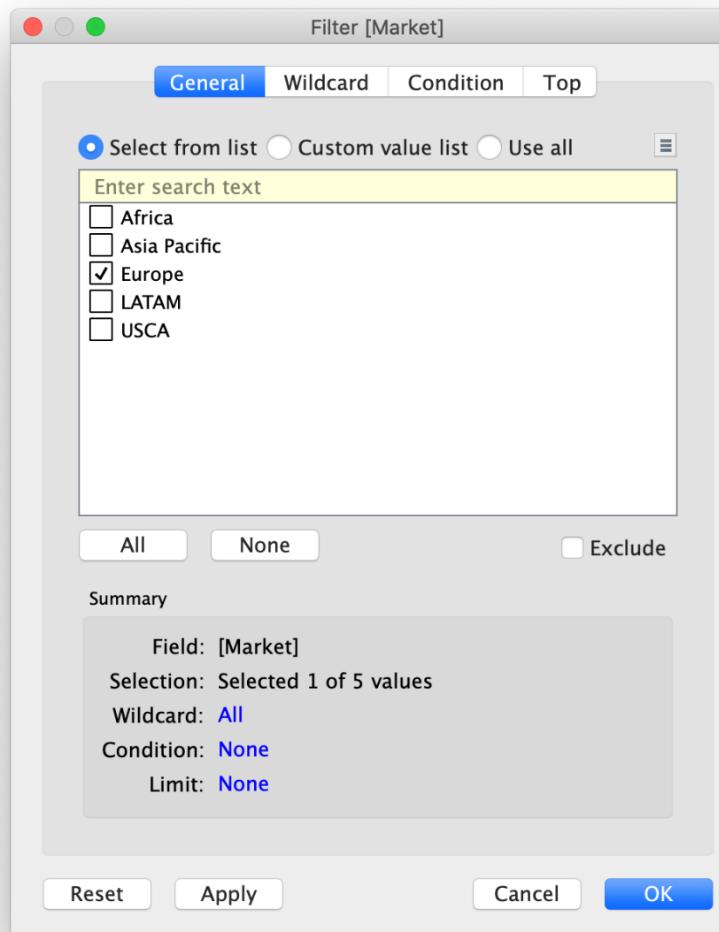
The screenshot shows the Tableau Data Prep interface with the following details:

- Data Source:** Orders (Global Superstore)
- Dimensions:**
 - Category, Sub-Category
 - Category
 - Sub-Category
 - Customer ID
 - Customer Name
 - Geo
 - Market
 - Region
 - Country
 - State
 - City
 - Postal Code
 - Order Date
 - Order ID
 - Order Priority
 - Product ID
 - Product Name
 - Row ID
 - Segment
- Measures:**
 - Discount
 - Profit
 - Quantity
 - Sales
 - Shipping Cost
 - Latitude (generated)
 - Longitude (generated)
 - Number of Records
 - Measure Values
- Marks:** Automatic, SUM(Profit)
- Sheet 7:** A data grid showing profit by Market, Region, and Country.

Market	Region	Country	Profit
Africa	Central Africa	Angola	6,495
		Cameroon	5,665
		Central African Republic	469
		Chad	90
		Democratic Republic of the Congo	21,861
		Equatorial Guinea	44
		Gabon	480
	Eastern Africa	Republic of the Congo	281
		Burundi	103
		Djibouti	804
North Africa	Eritrea	76	
	Ethiopia	290	
	Kenya	3,992	
	Madagascar	3,297	
	Malawi	117	
	Mozambique	5,818	
	Rwanda	1,336	
	Somalia	1,005	
	South Sudan	186	
	Tanzania	5,728	
Uganda	-2,426		
Zambia	7,002		
Zimbabwe	-5,429		
Algeria	Algeria	9,107	
	Egypt	19,702	
	Libya	2,045	
	Morocco	22,761	
Sudan	3,620		

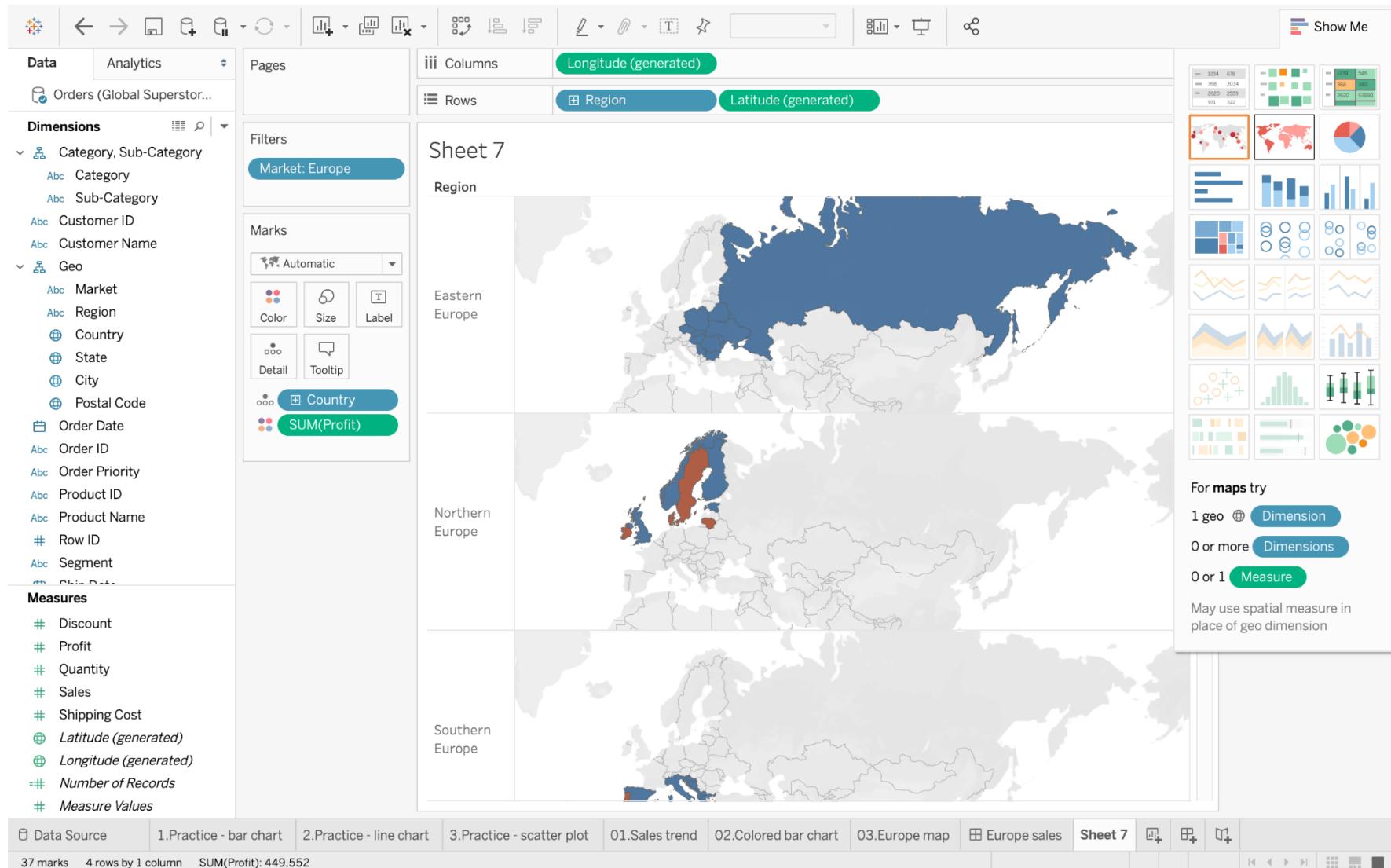
Add the custom geo hierarchy and drill down to **Countries**. Show Profit.

Map



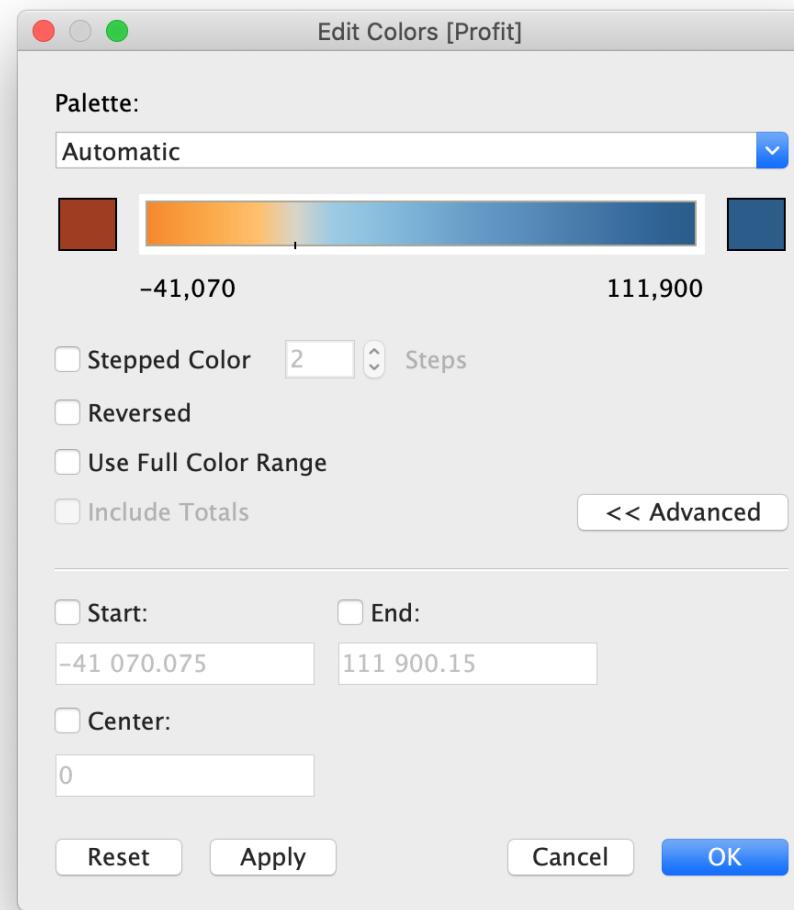
Filter to Europe only (**Market**)

Map



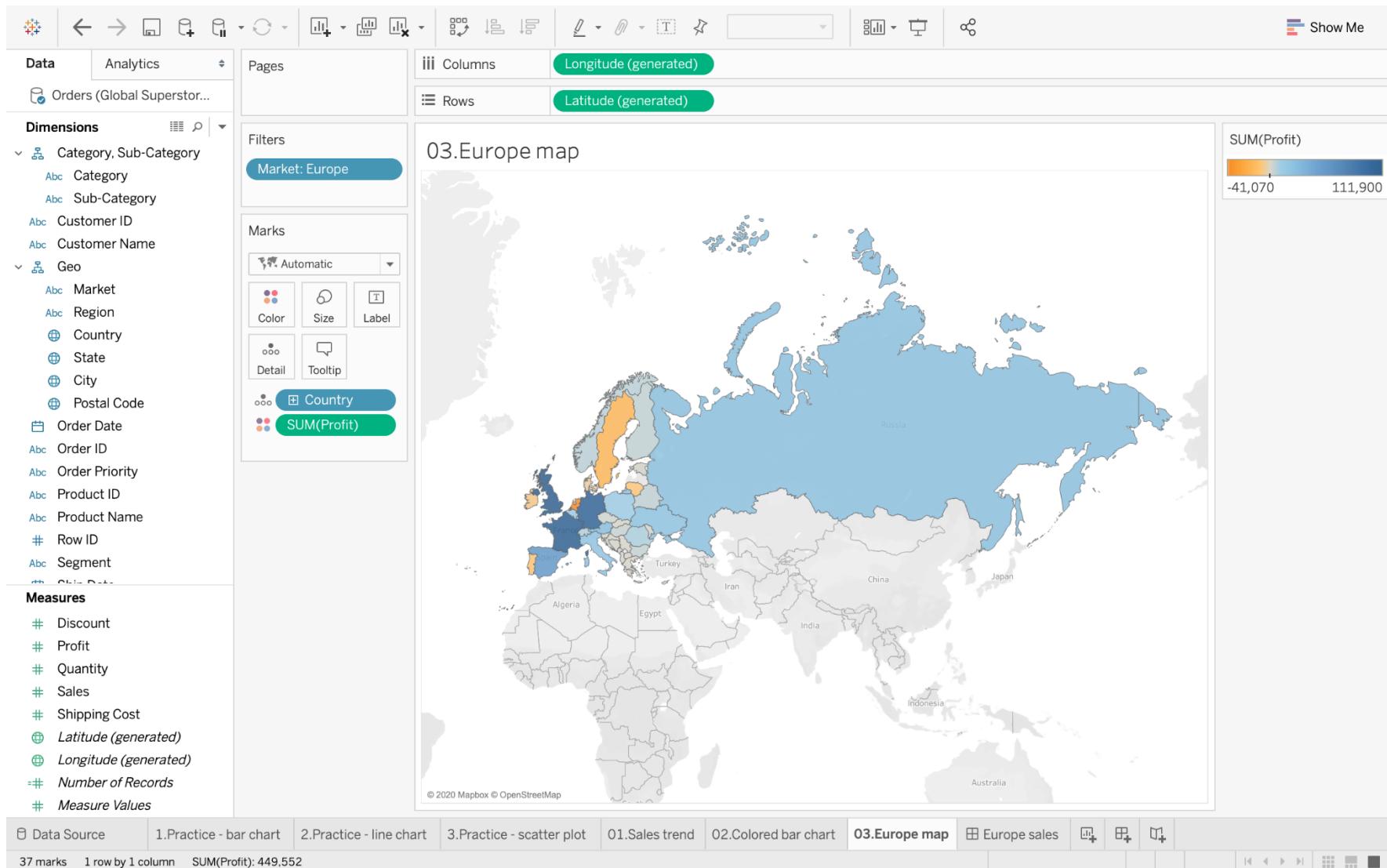
Select the second map type from the Show Me menu. Remove **Region** from the Rows.

Térkép



If the colors left from the previous sheet then you can reset it. Color Mark-on » Edit Colors » Reset.

Térkép

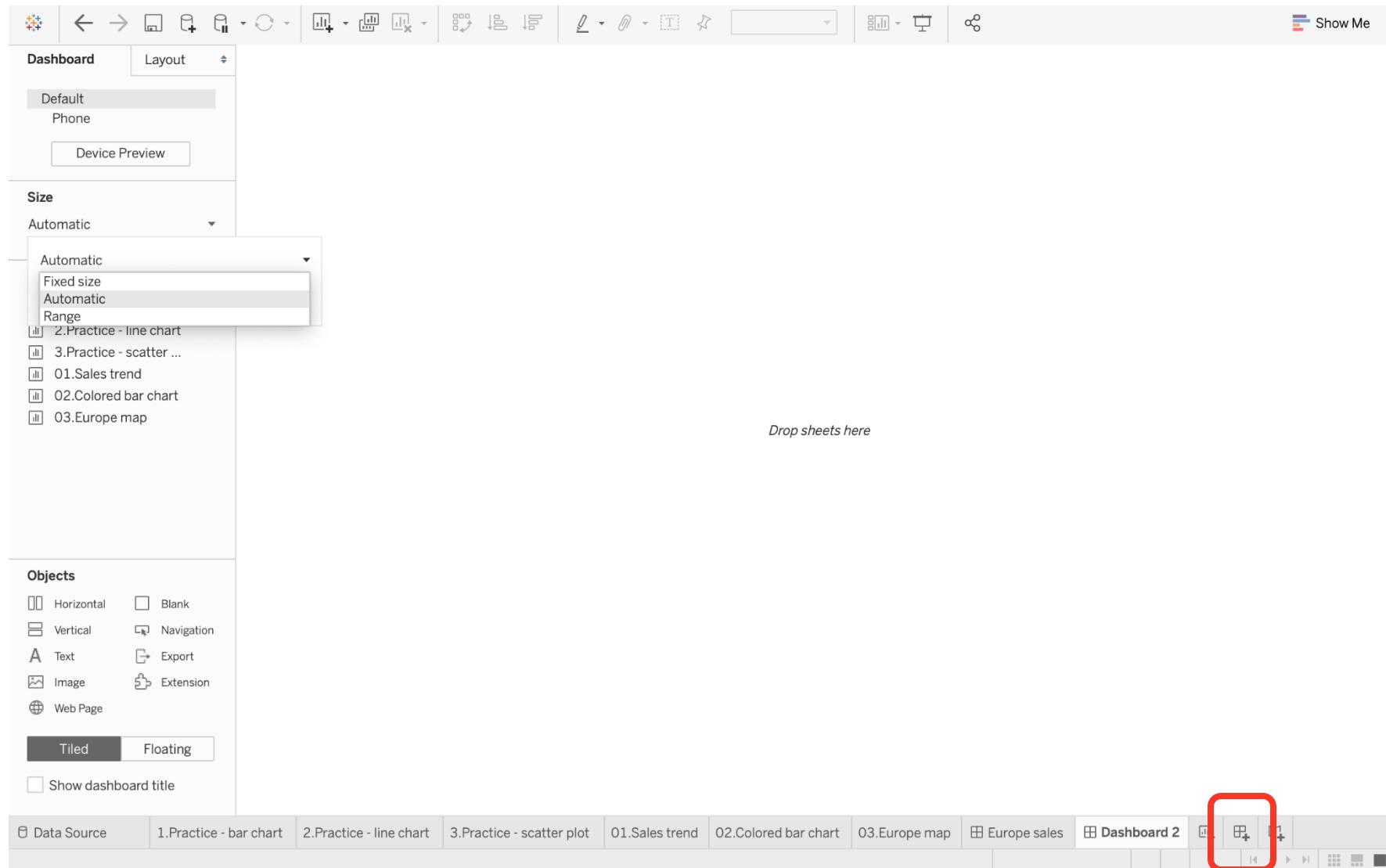


Delete Market from the Rows

First Dashboard

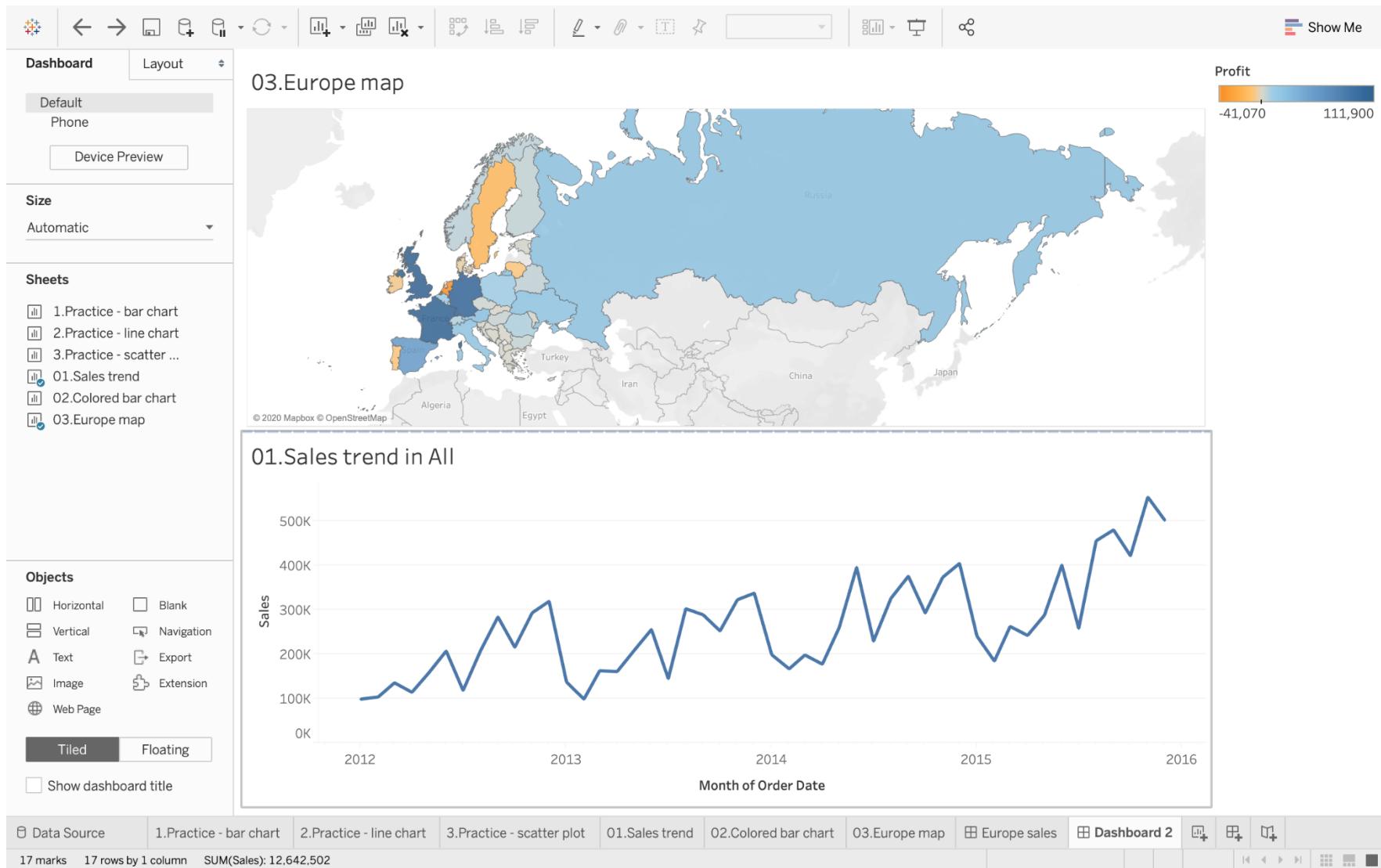
Dashboard layout

Dashboard layout



Create a new dashboard then set the Size to **Automatic**.

Dashboard layout



Drag the map and the line chart to the canvas.

Dashboard layout

The screenshot shows a dashboard layout interface with the following components:

- Left Sidebar:** Includes sections for "Device Preview" (Default, Phone), "Size" (Automatic), "Sheets" (1.Practice - bar chart, 2.Practice - line chart, 3.Practice - scatter plot, 01.Sales trend, 02.Colored bar chart, 03.Europe map), and "Objects" (Horizontal, Vertical, Text, Image, Web Page).
- Top Bar:** Features standard dashboard navigation icons.
- 03.Europe map:** A choropleth map of Europe where countries are colored based on a specific metric. The legend indicates values ranging from approximately -41,070 (orange) to 111,900 (blue).
- 02.Colored bar chart:** A horizontal bar chart showing sales data across different categories and sub-categories. The x-axis represents Sales (0K to 1500K). The y-axis lists categories like Furniture, Office Supplies, and various sub-categories.
- 01.Sales trend in All:** A line chart showing monthly sales trends from 2012 to 2016. The y-axis is Sales (0K to 500K) and the x-axis is Month of Order Date.
- Bottom Navigation:** Includes tabs for Data Source, 1.Practice - bar chart, 2.Practice - line chart, 3.Practice - scatter plot, 01.Sales trend, 02.Colored bar chart, 03.Europe map, Europe sales, Dashboard 2, and other dashboard-related icons.

Add the bar chart next to the map.

Dashboard layout

The screenshot shows a Tableau dashboard interface with the following details:

- Top Bar:** Includes standard dashboard controls like back, forward, search, and refresh.
- Left Sidebar:** Contains sections for "Dashboard", "Layout", "Size", "Sheets", and "Objects".
 - "Dashboard" section has "Default" and "Phone" options, with "Device Preview" selected.
 - "Layout" section has "Tiled" selected.
 - "Size" section has "Automatic" selected.
 - "Sheets" section lists:
 - 1.Practice - bar chart
 - 2.Practice - line chart
 - 3.Practice - scatter plot
 - 01.Sales trend
 - 02.Colored bar chart
 - 03.Europe map
 - "Objects" section lists icons for Horizontal, Vertical, Text, Image, and Web Page, each with a corresponding "Blank" or "Navigation" option.- Map Sheet:** A world map showing sales trends by region. A context menu is open over a bar chart area, with "Hide Title" highlighted.
- Bar Chart Sheet:** Titled "02.Colored bar chart", showing sales for various categories. The categories are grouped into "Furniture", "Tables", "Office Supplies", and "Sub-Categories".

Category	Sub-Category	Sales
Furniture	Bookcases	~1500K
Furniture	Chairs	~1000K
Furniture	Furniture	~800K
Tables	Tables	~700K
Office Supplies	Appliances	~1000K
Office Supplies	Art	~500K
Office Supplies	Binders	~500K
Office Supplies	Envelopes	~300K
Office Supplies	Fasteners	~100K
Office Supplies	Labels	~100K
Office Supplies	Paper	~300K
- Line Chart Sheet:** Titled "01.Sales trend in All", showing monthly sales from May 2012 to November 2015. The sales fluctuate between 100K and 500K.

Month of Order Date	Sales
May 2012	100K
June 2012	120K
July 2012	140K
August 2012	160K
September 2012	180K
October 2012	200K
November 2012	220K
December 2012	240K
January 2013	260K
February 2013	280K
March 2013	300K
April 2013	320K
May 2013	340K
June 2013	360K
July 2013	380K
August 2013	400K
September 2013	420K
October 2013	440K
November 2013	460K
December 2013	480K
January 2014	500K
February 2014	520K
March 2014	540K
April 2014	560K
May 2014	580K
June 2014	600K
July 2014	620K
August 2014	640K
September 2014	660K
October 2014	680K
November 2014	700K
December 2014	720K
January 2015	740K
February 2015	760K
March 2015	780K
April 2015	800K
May 2015	820K
June 2015	840K
July 2015	860K
August 2015	880K
September 2015	900K
October 2015	920K
November 2015	940K
- Bottom Navigation:** Includes tabs for "Data Source", "1.Practice - bar chart", "2.Practice - line chart", "3.Practice - scatter plot", "01.Sales trend", "02.Colored bar chart", "03.Europe map", "Europe sales", "Dashboard 2", and other dashboard controls.
- Bottom Status Bar:** Shows "17 marks 17 rows by 1 column SUM(Sales): 12,642,502".

You can edit or remove sheet titles.

Dashboard layout

The screenshot shows the Tableau desktop interface with a dashboard titled "Europe Sales". The dashboard includes a map of Europe with specific regions highlighted in orange, a bar chart showing sales by category and sub-category, and a line chart showing sales trends over time. A floating window titled "Tableau Book" is open, displaying the title "Europe Sales" and a preview of the line chart. The left sidebar contains sections for "Dashboard", "Layout", "Size", "Sheets", and "Objects". A red box highlights the "Show dashboard title" checkbox in the "Objects" section.

Dashboard

Layout

Default

Phone

Device Preview

Size

Automatic

Sheets

- 1.Practice - bar chart
- 2.Practice - line chart
- 3.Practice - scatter plot
- 01.Sales trend
- 02.Colored bar chart
- 03.Europe map

Objects

- Horizontal
- Vertical
- A Text
- Image
- Web Page
- Blank
- Navigation
- Export
- Extension

Show dashboard title

Europe Sales

Category Sub-Catego..

Category	Sub-Catego..	Sales
Furniture	Bookcases	1500K
Furniture	Chairs	1200K
Furniture	Furnishings	900K
Furniture	Tables	1100K
Office Supplies	Appliances	1000K
Office Supplies	Art	800K
Office Supplies	Binders	700K
Office Supplies	Envelopes	600K

500K 1000K 1500K

Sales

Tableau Book

18 B I U Insert X

Europe Sales

01.Sales trend in

Reset Apply Cancel OK

Sales

400K 200K 0K

Month of Order Date

May 2012 November 2012 May 2013 November 2013 May 2014 November 2014 May 2015 November 2015

Data Source 1.Practice - bar chart 2.Practice - line chart 3.Practice - scatter plot 01.Sales trend 02.Colored bar chart 03.Europe map Europe sales Dashboard 2

Select **Show dashboard title** and give a title to the dashboard.

Dashboard layout

The screenshot shows a Tableau dashboard interface with several components:

- Top Bar:** Includes standard dashboard controls like back, forward, refresh, and zoom.
- Left Sidebar:** Contains sections for "Dashboard", "Layout", "Size", "Sheets", and "Objects".
 - "Dashboard" includes "Default" and "Phone" views, and a "Device Preview" button.
 - "Layout" includes "Standard", "Fit Width", "Fit Height", and "Entire View" options, with "Entire View" highlighted by a red box.
 - "Size" has "Automatic" selected.
 - "Sheets" lists six sheets: "1.Practice - bar chart", "2.Practice - line chart", "3.Practice - scatter plot", "01.Sales trend", "02.Colored bar chart", and "03.Europe map".
 - "Objects" includes icons for Horizontal, Vertical, Text, Image, and Web Page, with "Tiled" selected.
- Map View:** A choropleth map of Europe where countries are colored based on sales data. A copyright notice "© 2020 Mapbox © OpenStreetMap" is visible at the bottom.
- Bar Chart:** Titled "Sales", it shows sales volume for different categories. The Y-axis is "Category" and the X-axis is "Sales".

Category	Sub-Catego..	Sales
Furniture	Bookcases	~1500K
Furniture	Chairs	~1500K
Furniture	Furnishings	~500K
Furniture	Tables	~700K
Office Supplies	Appliances	~1000K
Office Supplies	Art	~500K
Office Supplies	Binders	~500K
Office Supplies	Envelopes	~100K
Office Supplies	Fasteners	~50K
Office Supplies	Labels	~50K
Office Supplies	Paper	~50K
Office Supplies	Storage	~1000K
- Line Chart:** Titled "01.Sales trend", it plots "Sales" over time from May 2012 to November 2015. The Y-axis ranges from 0K to 400K.
- Bottom Navigation:** Includes "Data Source", sheet names, and dashboard navigation buttons.
- Bottom Status Bar:** Shows "17 marks", "17 rows by 1 column", and "SUM(Sales): 12,642,502".

You can change the way a sheet fills its box from the top menu.

Dashboard filter

Dashboard filter

Use as Filter

You can use any sheet on the dashboard to filter other sheets by clicking on its marks. You can set the map for example to see any country's data on other sheets.

Dashboard filter

The screenshot shows a Tableau dashboard titled "Europe Sales". On the left, there's a sidebar with "Dashboard" and "Layout" tabs, "Default Phone" and "Device Preview" options, "Size" set to "Automatic", and a "Sheets" section listing various practice sheets like "1.Practice - bar chart", "2.Practice - line chart", etc., with "03.Europe map" selected. Below that is an "Objects" section with icons for Horizontal, Vertical, Text, Image, and Web Page, and buttons for "Tiled" (selected) and "Floating". A "Show dashboard title" checkbox is checked.

The main area contains two visualizations: a map of Europe where Russia is highlighted in blue, and a line chart titled "01.Sales trend" showing monthly sales from May 2012 to November 2015. The line chart has "Sales" on the y-axis (0K to 6K) and "Month of Order Date" on the x-axis. A context menu is open over the map, with the "Use as Filter" option highlighted in blue.

The context menu includes:

- Category
- Sub-Catego..
- Bookcases
- Chairs
- Furnishings
- Go to Sheet
- Duplicate Sheet
- Title
- Caption
- Legends
- Filters
- Highlighters
- Show Page Control
- View Toolbar
- ✓ Use as Filter** (highlighted)
- Ignore Actions
- Floating
- Select Container: Tiled
- Deselect
- Remove from Dashboard
- Rename Dashboard Item...

At the bottom, the dashboard footer shows "Data Source" and other sheet names: "1.Practice - bar chart", "2.Practice - line chart", "3.Practice - scatter plot", "01.Sales trend", "02.Colored bar chart", "03.Europe map", "Europe sales", and "Dashboard 2". It also displays "1 of 37 marks", "1 row by 1 column", and "SUM(Profit): 22,536".

Select the map » right click » **Use as Filter**

Dashboard filter

Dashboard filter

You can add an interactive filter to the dashboard for any column that is part of at least one of the sheets on the dashboard.

Dashboard filter

The screenshot shows a Tableau dashboard titled "Sales in Europe". The dashboard includes a map of Europe where several countries are highlighted in orange, and a line chart titled "01.Sales trend" showing sales over time from May 2012 to November 2015.

Two context menus are open:

- A context menu for a bar chart in the top right corner, with the "Sub-Category" option selected. The menu also includes "Furniture", "Bookcases", "Chairs", "Furnishings", and "Tables".
- A context menu for the line chart, with the "Sub-Category" option also selected. This menu includes "Disable Auto Update", "Action (Country)", "Category", "Sub-Category", "Sum of Profit", and "Sum of Sales".

The dashboard sidebar on the left contains sections for "Default", "Phone", "Device Preview", "Size" (set to "Automatic"), "Sheets" (listing items 1 through 3, 01 through 03), and "Objects" (listing Horizontal, Vertical, Text, Image, Web Page, and their respective icons). The "Floating" tab is selected in the objects section.

The bottom of the dashboard shows a navigation bar with tabs for "Data Source", "1.Practice - bar chart", "2.Practice - line chart", "3.Practice - scatter plot", "01.Sales trend", "02.Colored bar chart", "03.Europe map", "Europe sales" (which is selected and highlighted in blue), "Dashboard 2", "Dashboard 3", and other dashboard icons. It also displays "17 marks 17 rows by 1 column SUM(Sales): 12,642,502".

Bar chart menu » Filters » Sub-Category

Dashboard filter

Sales in Europe

The dashboard includes a sidebar with settings for 'Default' (Phone), 'Size' (Automatic), 'Sheets' (including 1.Practice - bar chart, 2.Practice - line chart, 3.Practice - scatter plot, 01.Sales trend, 02.Colored bar chart, 03.Europe map), and 'Objects' (Horizontal, Vertical, Text, Image, Web Page) with 'Tiled' selected. A 'Show Me' button is also present.

01.Sales trend

Month of Order Date

Sales

0K 200K 400K

2012 2013 2014 2015 2016

Category Sub-Catego..

Category	Sub-Catego..	Sales
Furniture	Furnishings	~450K
Furniture	Tables	~650K
Office Supplies	Appliances	~1000K
Office Supplies	Envelopes	~150K
Office Supplies	Fasteners	~50K
Office Supplies	Labels	~50K
Office Supplies	Paper	~400K
Office Supplies	Storage	~1100K
Office Supplies	Supplies	~400K
Technology	Accessories	~700K
Technology	Copiers	~1500K
Technology	Machines	~800K
Technology	Phones	~1700K

Sub-Category

- (All)
- Accessories
- Appliances
- Art
- Binders
- Bookcases
- Chairs
- Copiers
- Envelopes
- Fasteners
- Furnishings
- Labels
- Machines
- Paper
- Phones
- Storage
- Supplies
- Tables

Data Source 1.Practice - bar chart 2.Practice - line chart 3.Practice - scatter plot 01.Sales trend 02.Colored bar chart 03.Europe map Europe sales Dashboard 2 Dashboard 3

13 marks 13 rows by 1 column SUM(Sales): 8,840,765

It only affects the bar chart

Dashboard filter

Sales in Europe

01.Sales trend

Category Sub-Catego..

Category	Sub-Catego..
Furniture	Furnishings
Office Supplies	Tablets
	All Using Related Data Sources
	All Using This Data Source
	Selected Worksheets...
	✓ Only This Worksheet
Technology	Laptops
	Paper
	Storage
	Supplies
	Accessories
	Copiers
	Machines
	Phones

0K 500K 1000K Sales

Edit Filter...
Apply to Worksheets
Format Filter and Set Controls...
Customize
✓ Show Title
Edit Title...
Single Value (list)
Single Value (dropdown)
Single Value (slider)
✓ Multiple Values (list)
Multiple Values (dropdown)
Multiple Values (custom list)
Wildcard Match
Only Relevant Values
✓ All Values in Hierarchy
All Values in Database
✓ Include Values
Exclude Values
Floating
Fix Height
Edit Height...
Select Container: Vertical
Deselect
Remove from Dashboard
Rename Dashboard Item...

Horizontal Blank
Vertical Navigation
Text Export
Image Extension
Web Page

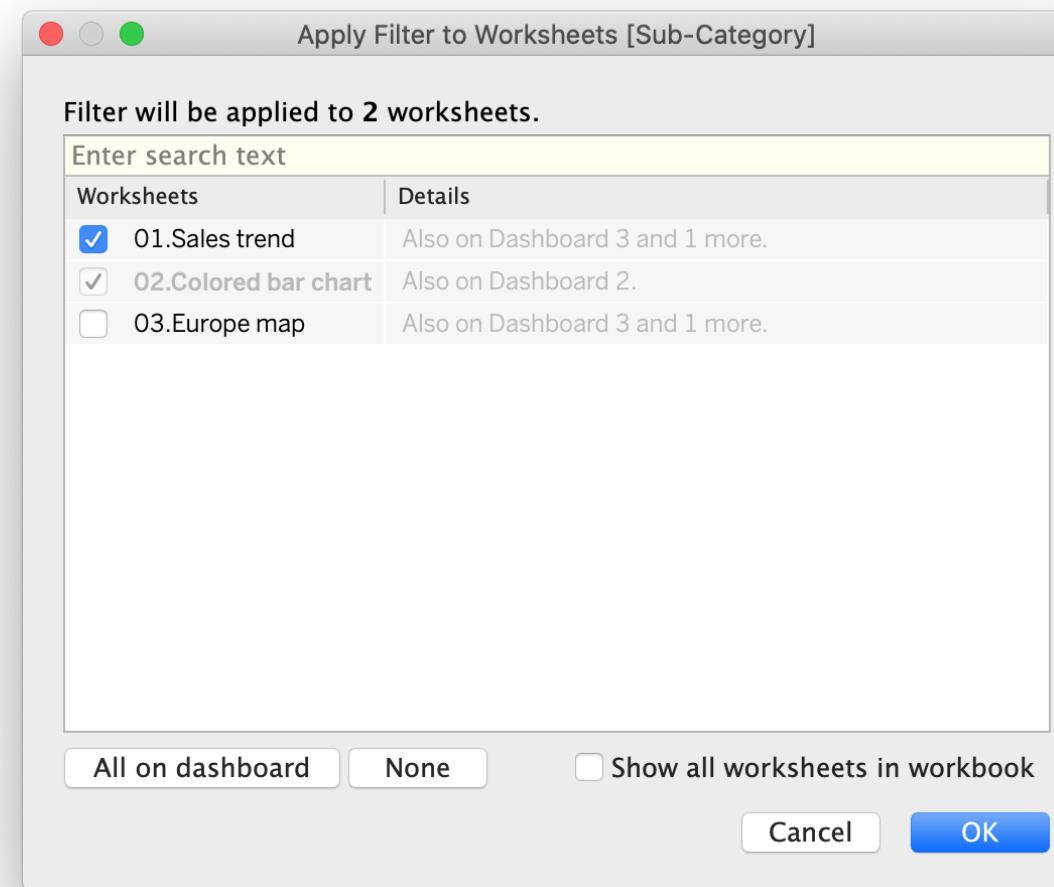
Tiled Floating

Show dashboard title

Data Source 1.Practice - bar chart 2.Practice - line chart 3.Practice - scatter plot 01.Sales trend 02.Colored bar chart 03.Europe map Europe sales Dashboard 2 Dashboard 3

Apply it to other sheets on the dashboard. Right click on the filter » **Apply to worksheet** » Selected Worksheets...

Dashboard filter



Choose the sheets you want to filter.

Dashboard filter

Sales in Europe

© 2020 Mapbox © OpenStreetMap

Category	Sub-Catego..	Sales
Furniture	Bookcases	~1500K
	Chairs	~1500K
Office Supplies	Appliances	~1000K
	Art	~400K
	Binders	~500K
Technology	Accessories	~700K
	Copiers	~1500K

01.Sales trend

The line chart displays the monthly sales trend from January 2012 to December 2016. The Y-axis represents Sales in thousands, ranging from 0K to 300K. The X-axis represents the Month of Order Date. The sales show a general upward trend with significant fluctuations, particularly after 2013.

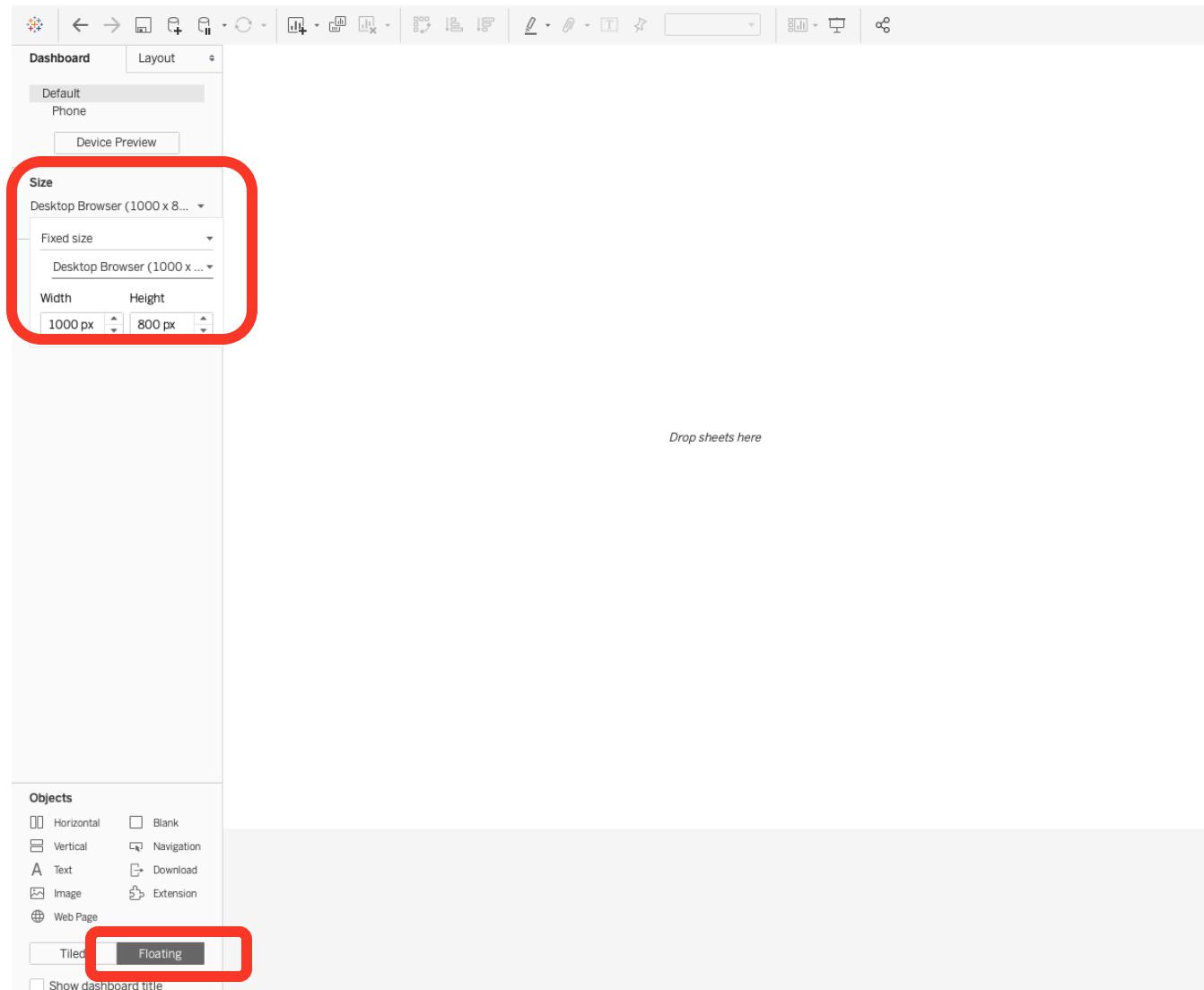
Month	Sales (approx.)
Jan 2012	50K
Feb 2012	60K
Mar 2012	70K
Apr 2012	100K
May 2012	120K
Jun 2012	150K
Jul 2012	130K
Aug 2012	160K
Sep 2012	140K
Oct 2012	170K
Nov 2012	150K
Dec 2012	180K
Jan 2013	70K
Feb 2013	80K
Mar 2013	100K
Apr 2013	120K
May 2013	140K
Jun 2013	160K
Jul 2013	180K
Aug 2013	150K
Sep 2013	170K
Oct 2013	140K
Nov 2013	160K
Dec 2013	180K
Jan 2014	100K
Feb 2014	120K
Mar 2014	140K
Apr 2014	160K
May 2014	180K
Jun 2014	200K
Jul 2014	180K
Aug 2014	150K
Sep 2014	170K
Oct 2014	140K
Nov 2014	160K
Dec 2014	180K
Jan 2015	120K
Feb 2015	140K
Mar 2015	160K
Apr 2015	180K
May 2015	200K
Jun 2015	220K
Jul 2015	200K
Aug 2015	180K
Sep 2015	200K
Oct 2015	180K
Nov 2015	200K
Dec 2015	220K
Jan 2016	250K
Feb 2016	280K
Mar 2016	260K
Apr 2016	280K
May 2016	250K
Jun 2016	280K
Jul 2016	260K
Aug 2016	280K
Sep 2016	250K
Oct 2016	280K
Nov 2016	260K
Dec 2016	280K

Sub-Category

- (All)
- Accessories
- Appliances
- Art
- Binders
- Bookcases
- Chairs
- Copiers
- Envelopes
- Fasteners
- Furnishings
- Labels
- Machines
- Paper
- Phones
- Storage
- Supplies
- Tables

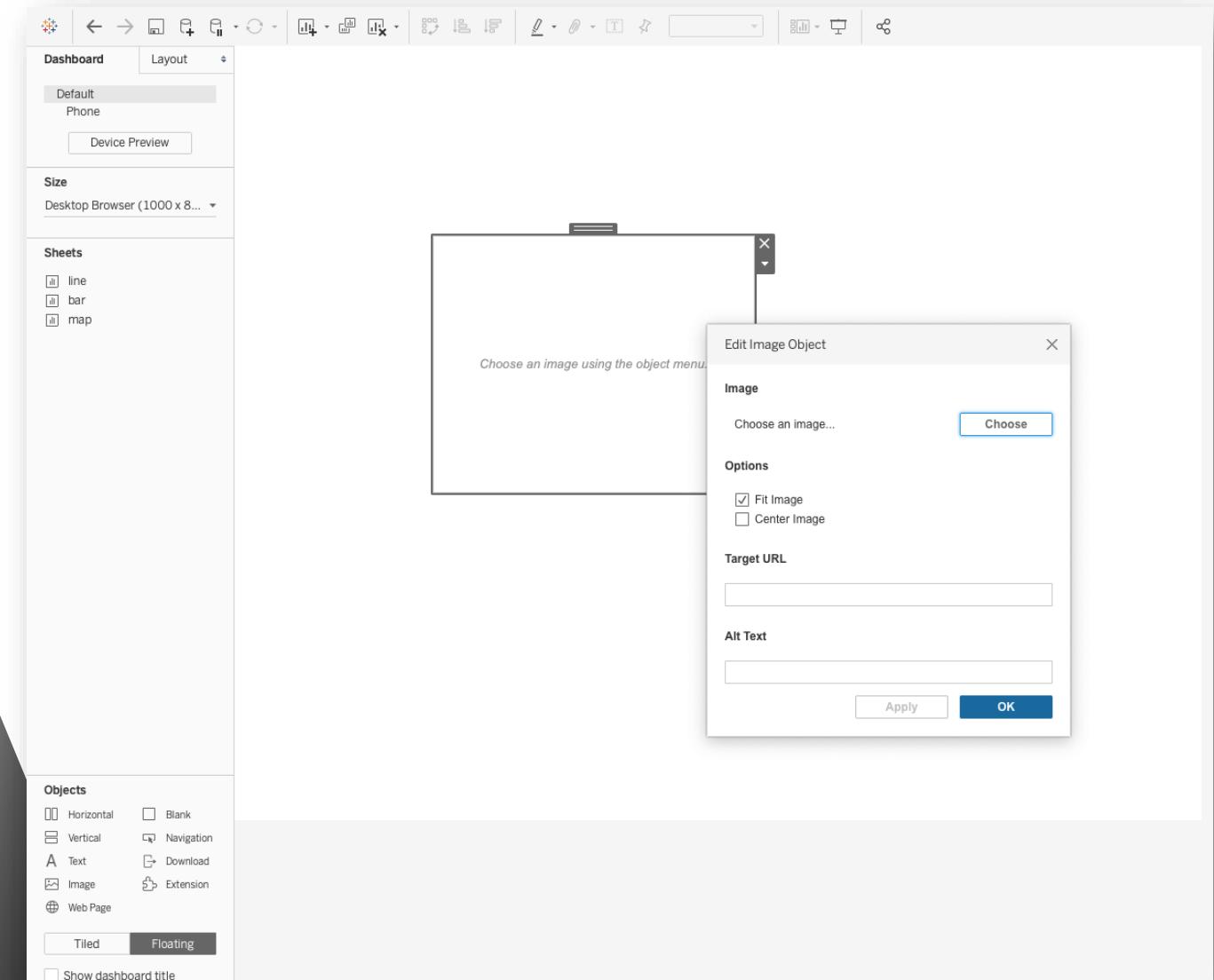
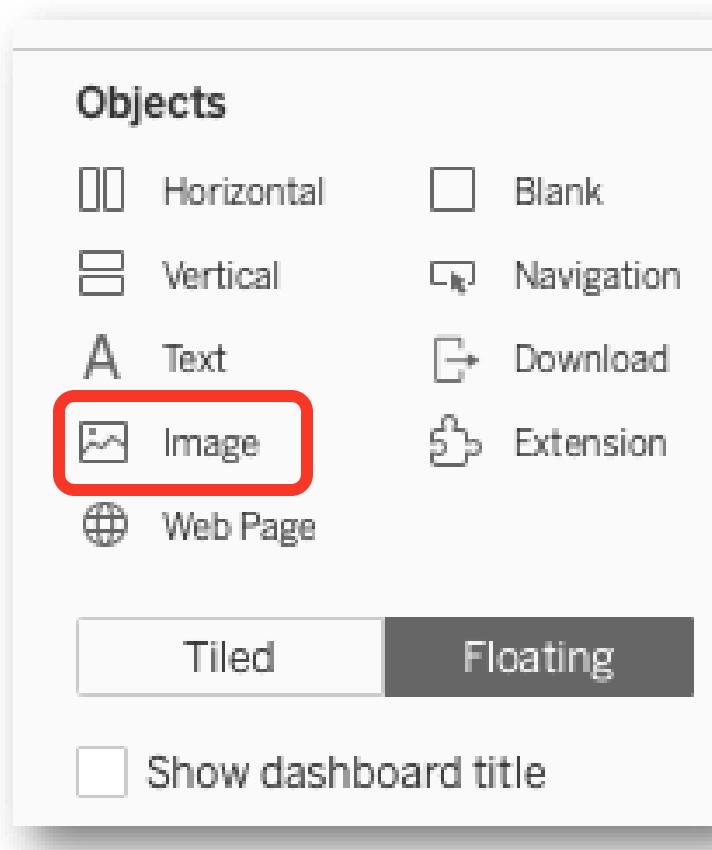
Dashboard objects

Floating dashboard



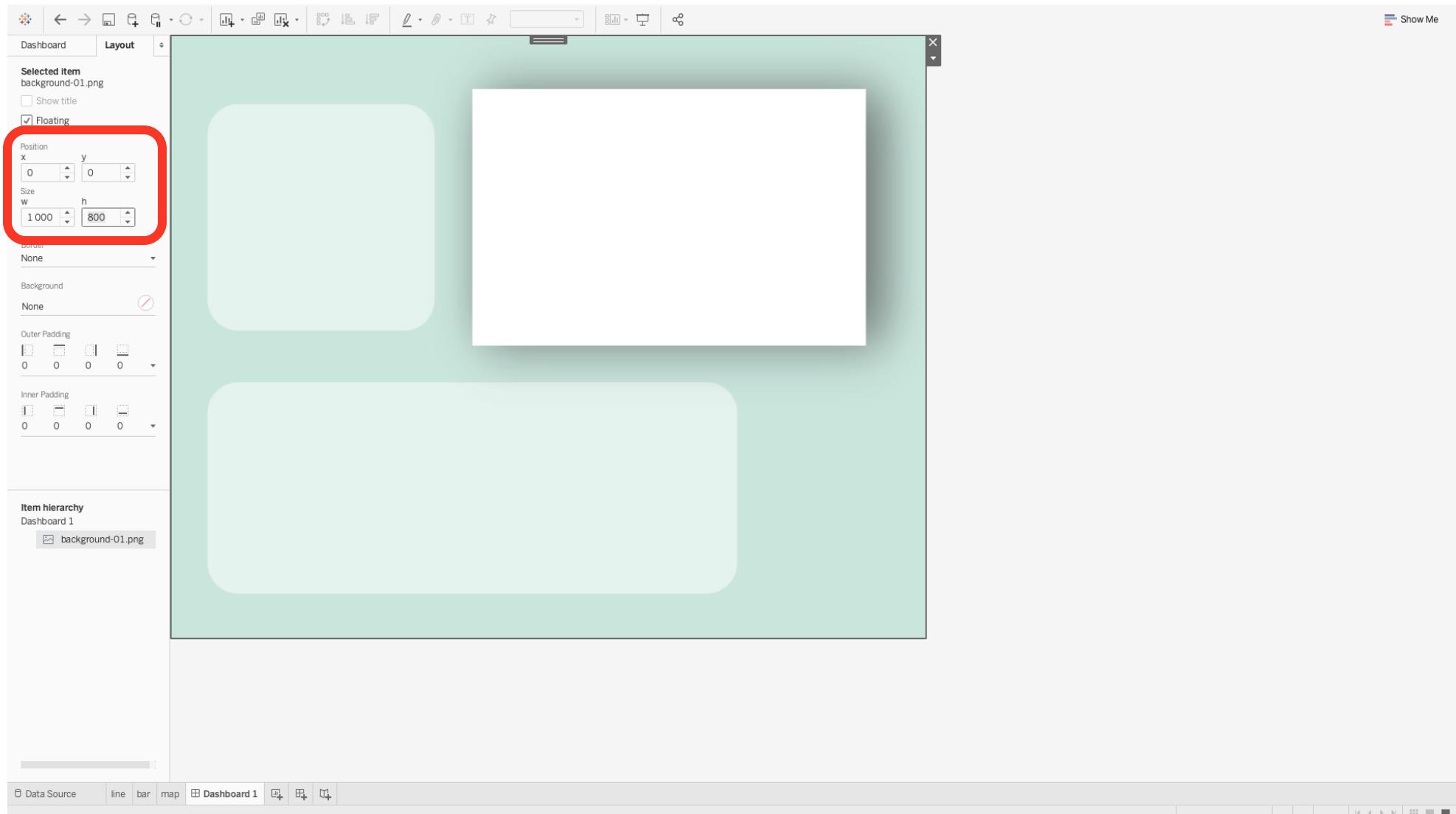
New Dashboard » You can change the fixed size on the left. Leave it at Desktop Browser (1000x800) for now. Select the **Floating** option for objects.

Floating dashboard



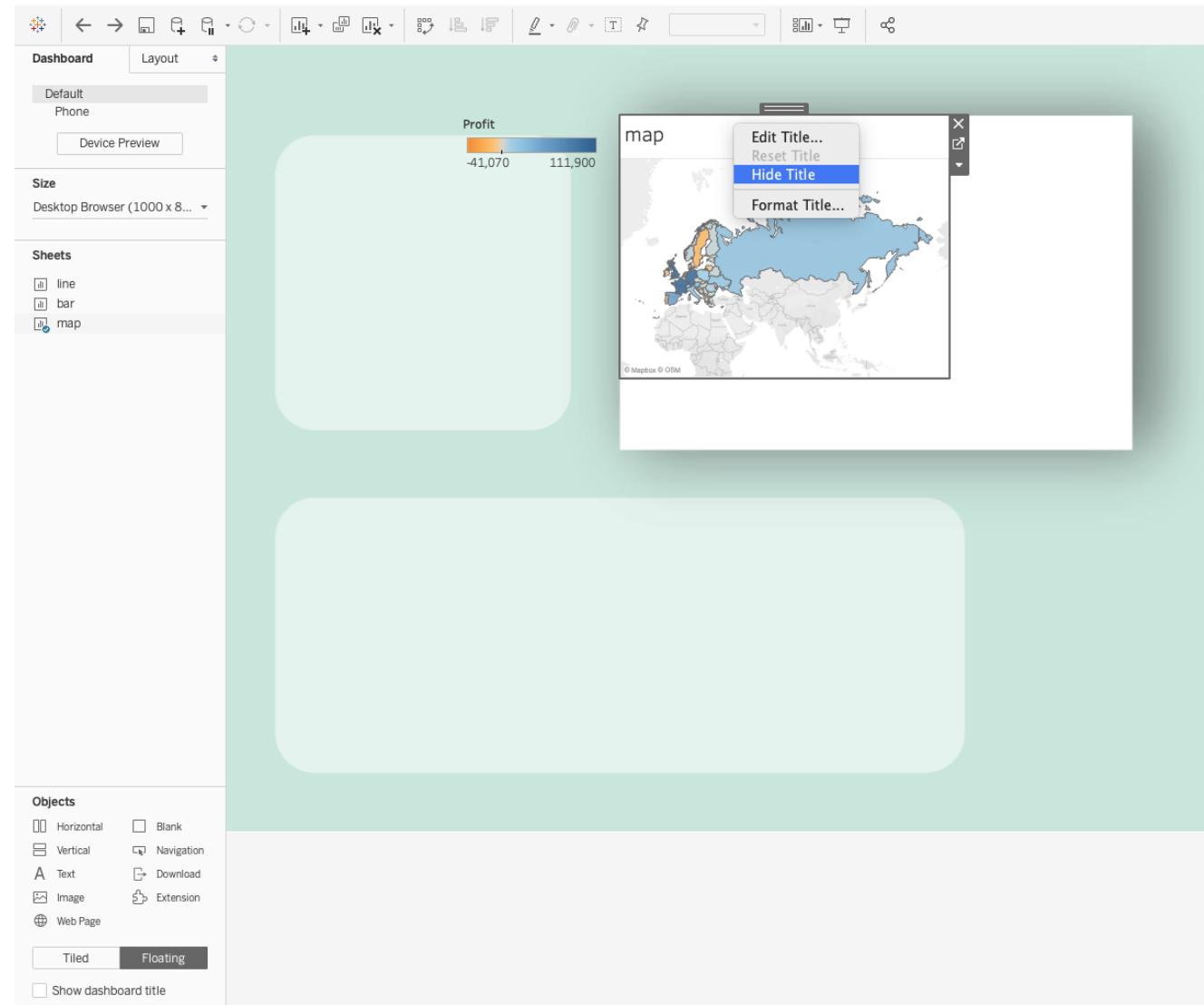
Add Image

Floating dashboard



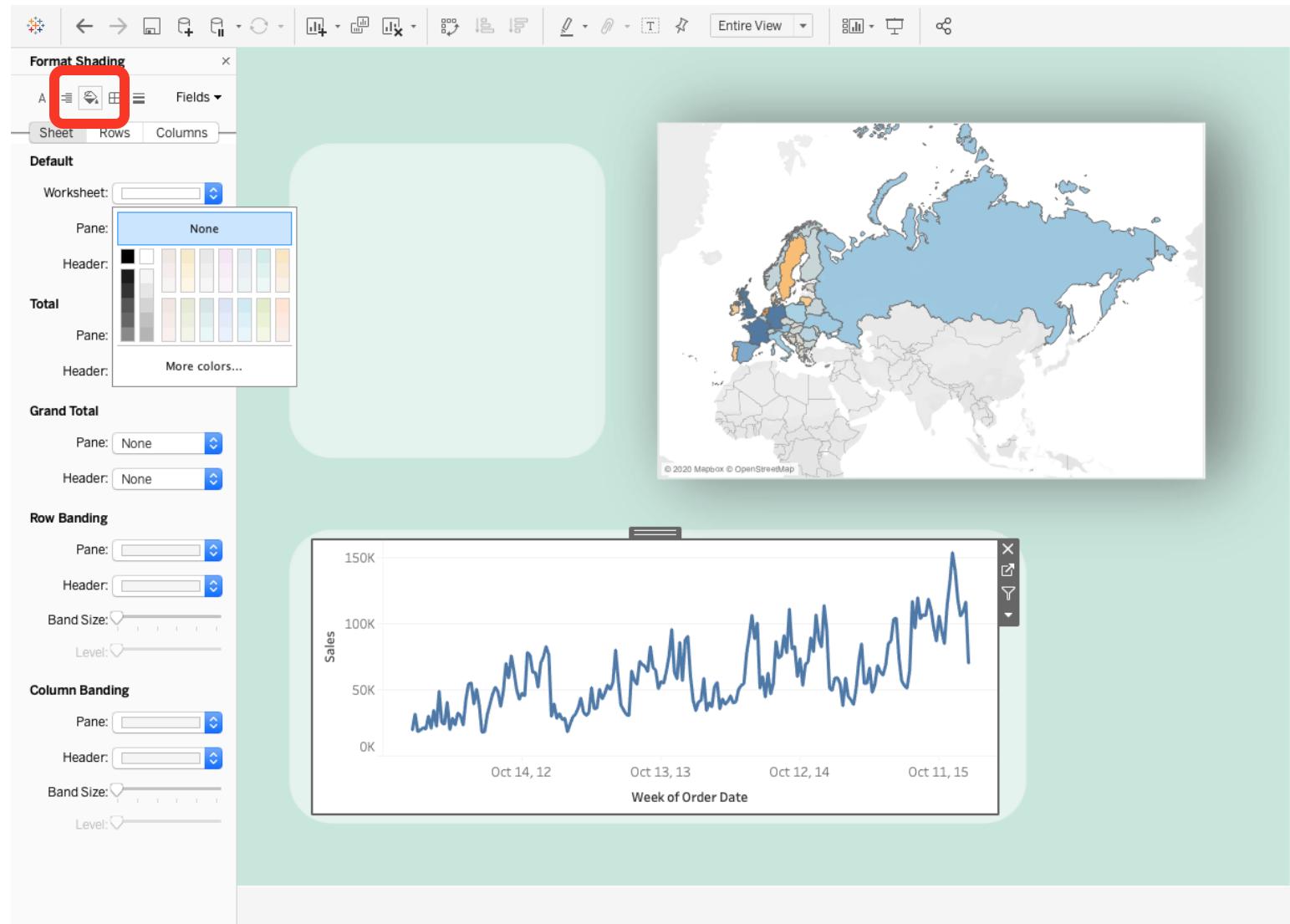
Set the **Position** to 0,0 and **Size** to 1000,800 pixels

Floating dashboard



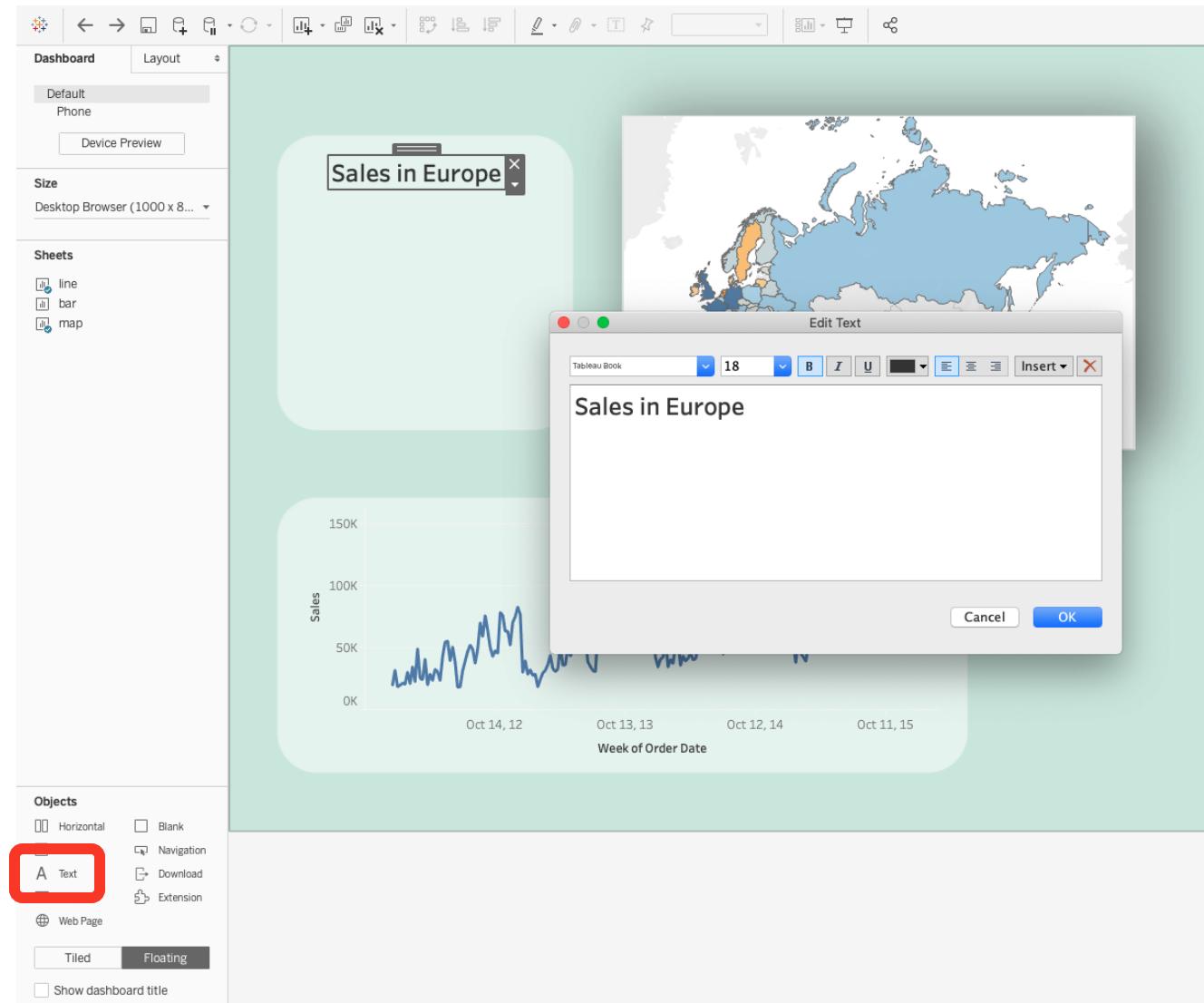
Drag the map into the white box on the right. Hide the title (right click) and remove the legend (x)

Floating dashboard



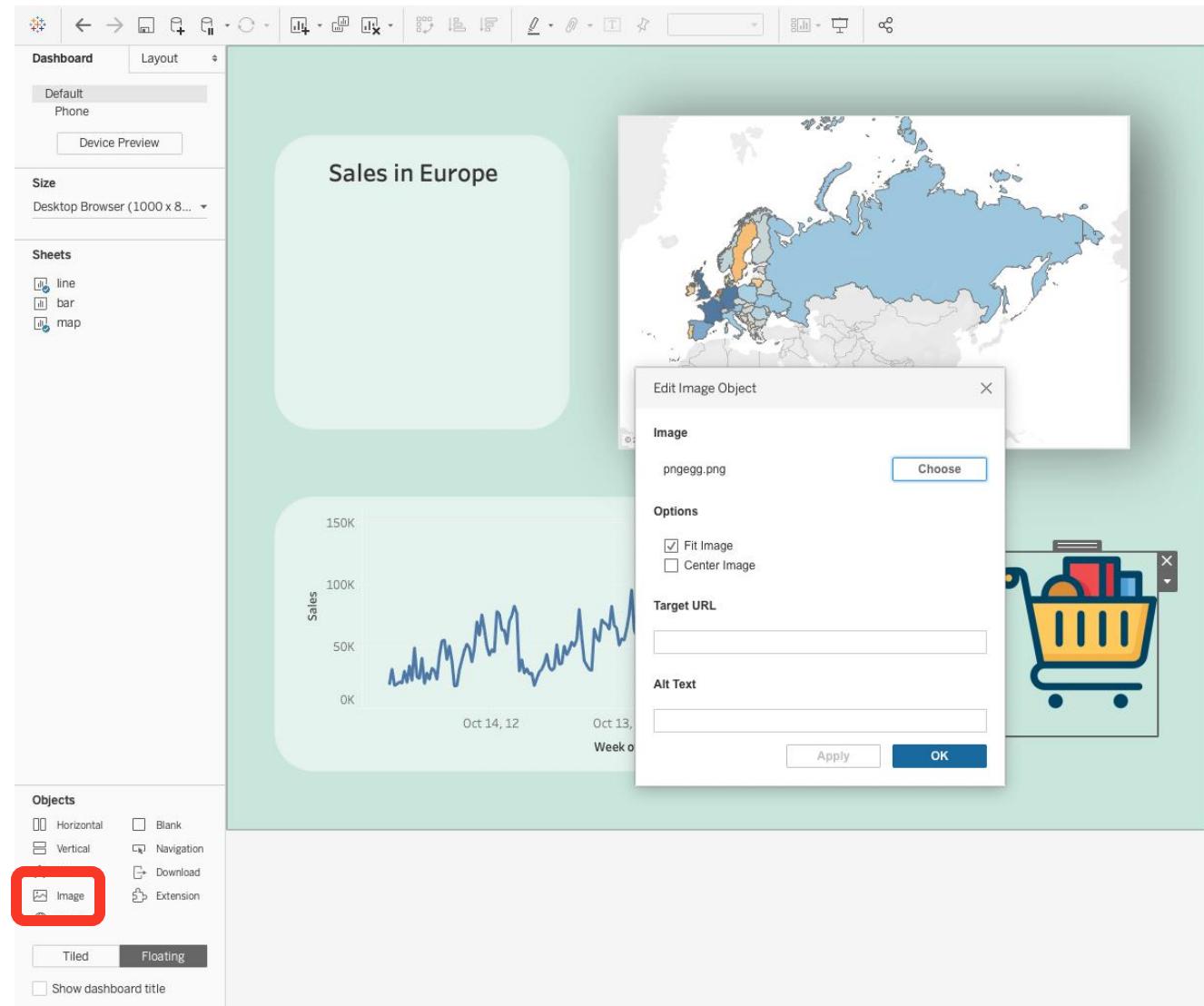
Drag the line chart into the box in the bottom. Select Right click » Format » Shading » Worksheet » None for a transparent chart

Floating dashboard



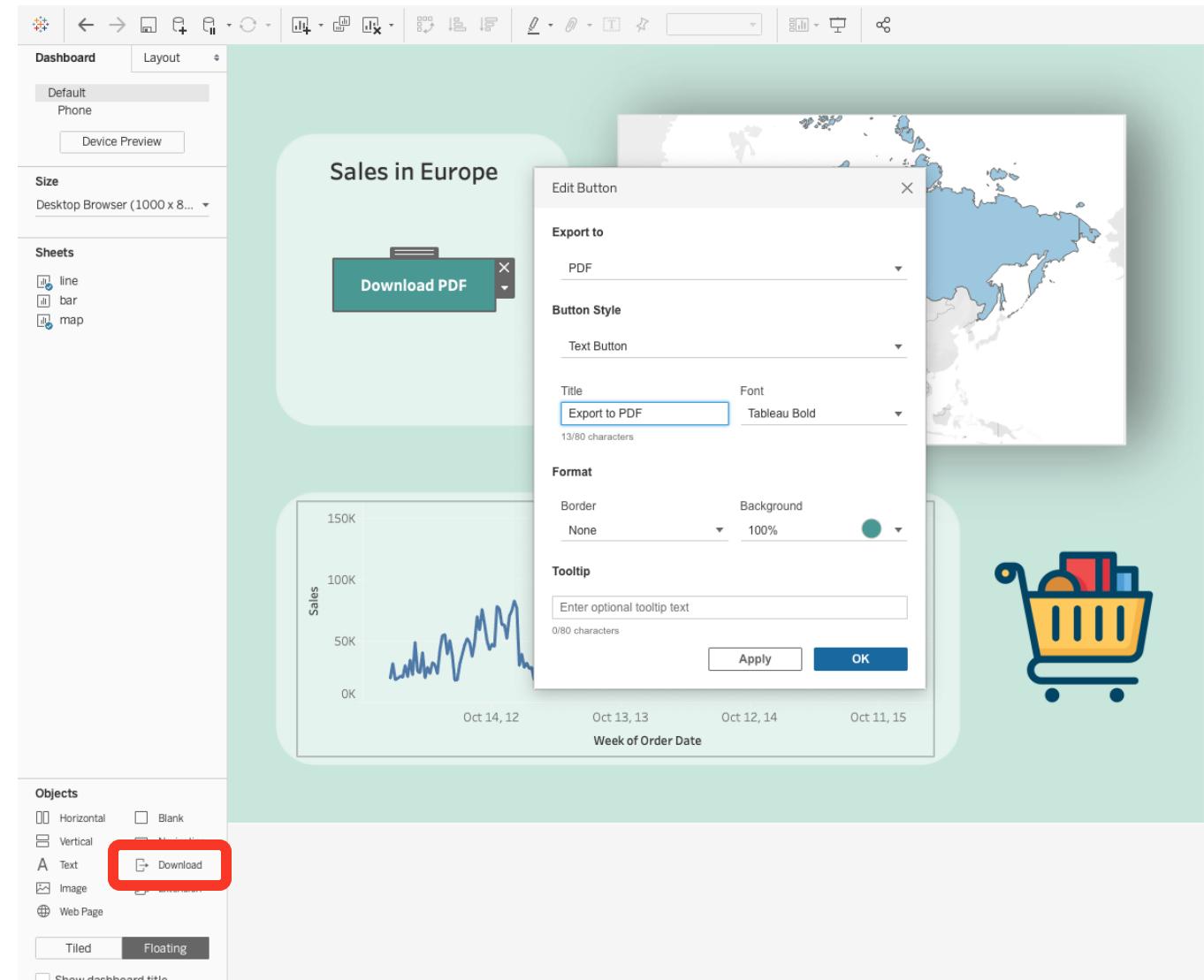
Add a text with the title

Floating dashboard



Add an image next to the line chart. Resize it manually.

Floating dashboard



Add a Download button

Floating dashboard

The screenshot shows a Tableau floating dashboard interface. On the left, there's a sidebar with various settings: 'Dashboard' (selected), 'Layout' (Default, Phone, Device Preview), 'Size' (Desktop Browser (1000 x 800)), and 'Sheets' (line, bar, map). Below these are 'Objects' (Horizontal, Vertical, Text, Image, Web Page) and a 'Tiled' vs 'Floating' switch (set to Floating). At the bottom of the sidebar are buttons for 'Data Source', 'line', 'bar', 'map', 'Dashboard 1', and a toolbar with icons for zoom, refresh, and other dashboard controls.

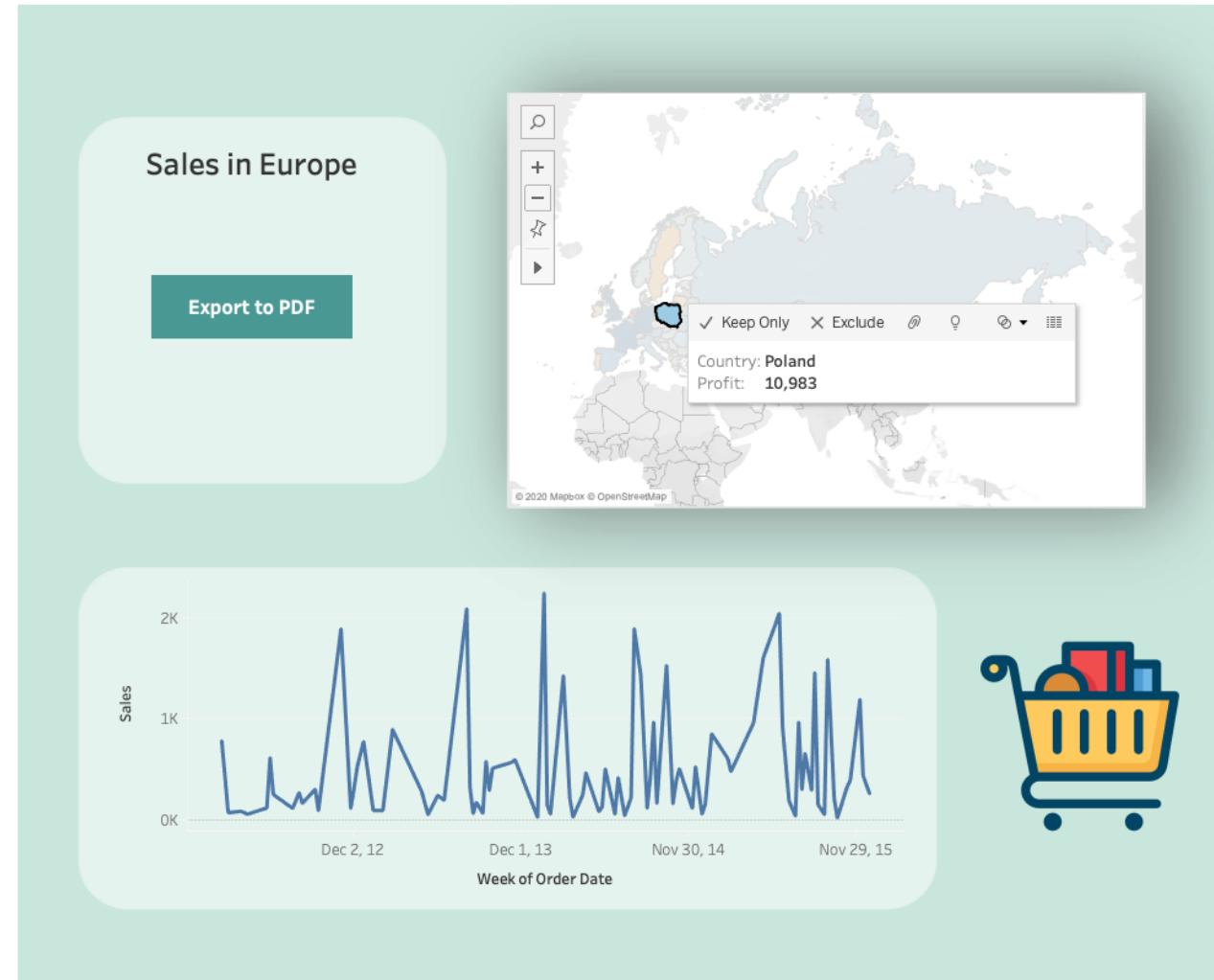
The main area displays two floating sheets:

- Sales in Europe**: A map of Europe where countries are colored by sales volume. A red box highlights the control panel for this sheet, which includes a close button (X), a maximize/minimize button, and a refresh button.
- Sales**: A line chart showing Sales over time from Oct 14, 12 to Oct 11, 15. The Y-axis ranges from 0K to 150K. The X-axis is labeled 'Week of Order Date'. To the right of the chart is a shopping cart icon.

At the bottom of the dashboard, it says '37 marks 1 row by 1 column SUM(Profit): 449.552'.

Select Use as Filter on the map

Floating dashboard



Check the result with the presentation view (F7 or Alt+Enter)

Dashboard practice

Dashboard practice

- How do Eastern-European countries perform? Show the **Quantity** and **Sales** numbers throughout the four years.

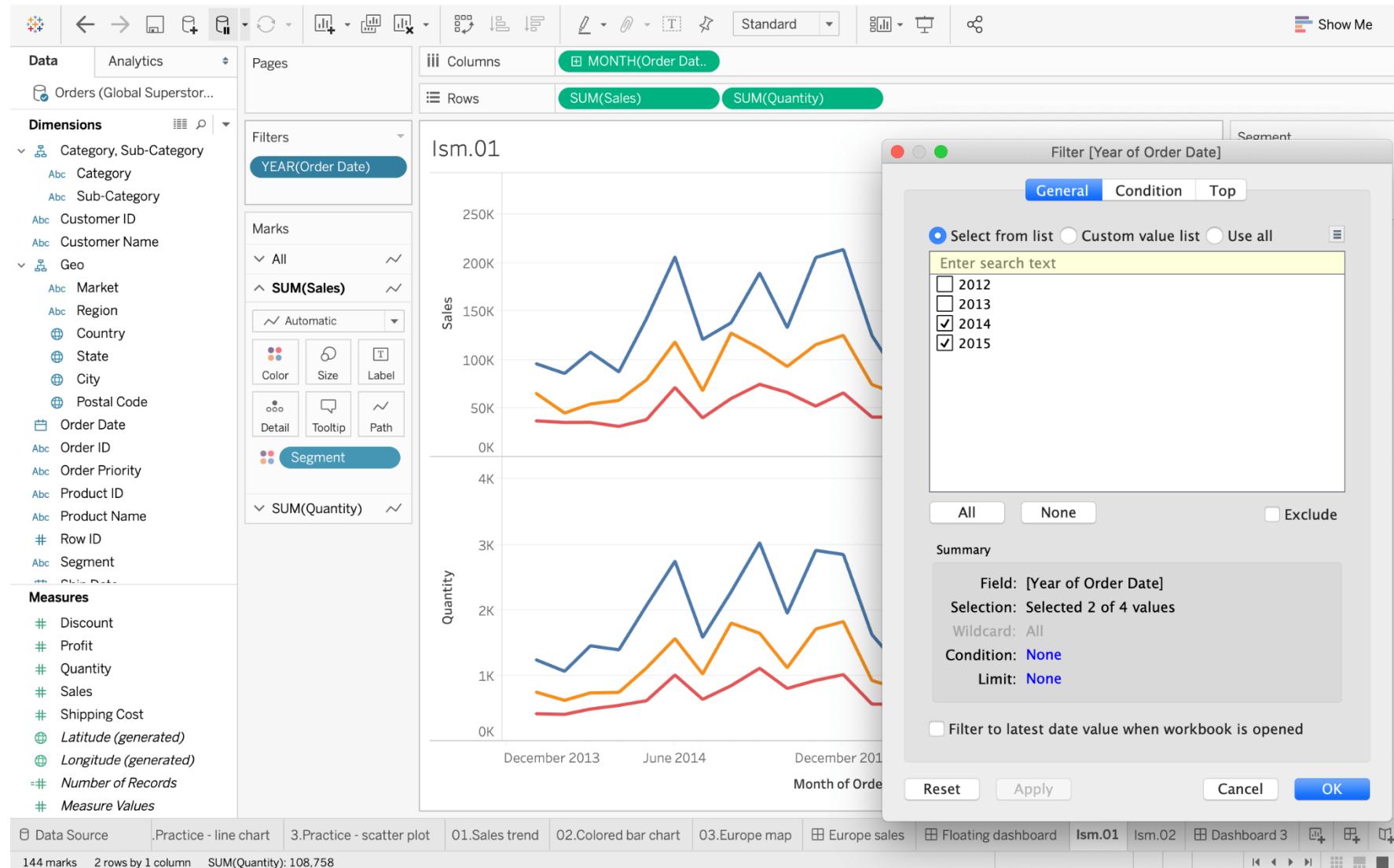
Dashboard practice

The screenshot shows a Tableau desktop interface with a dashboard titled "lsm.02". The dashboard contains a table with four columns: Country, Consumer, Corporate, Home Office, and Consumer. The data includes rows for Belarus, Bulgaria, Czech Republic, Hungary, Moldova, Poland, Romania, Russia, Serbia, Slovakia, and Ukraine. A filter dialog box titled "Filter [Region]" is overlaid on the dashboard. The dialog has tabs for General, Wildcard, Condition, and Top, with the General tab selected. It shows a list of regions with "Eastern Europe" checked. Buttons for "All", "None", and "Exclude" are present. Below the list, summary information is displayed: Field: [Region], Selection: Selected 1 of 23 values, Wildcard: All, Condition: None, and Limit: None. At the bottom are "Reset", "Apply", "Cancel", and "OK" buttons. The bottom of the screen shows the Tableau ribbon with various icons and a status bar indicating "60 marks 11 rows by 6 columns SUM of Measure Values: 313,642".

Country	Consumer	Corporate	Home Office	Consumer
Belarus	96	43	39	5,900
Bulgaria	124	15	30	10,200
Czech Republic	64	41	59	4,200
Hungary	71	56	47	3,100
Moldova	50	29	16	3,300
Poland	279	153	131	17,400
Romania	165	132	79	16,700
Russia	452	305	160	40,200
Serbia	5			2,500
Slovakia	13	5		6,500
Ukraine	524	291	135	48,900

Country, Segment, Quantity, Sales » Region filter (Eastern Europe)

Dashboard practice



Order Date (continuous Month), Sales, Quantity, Segment (Color) » Year filter

Dashboard practice

A három szegmens eredményei Kelet-Európában

Country	Quantity			Sales		
	Consumer	Corporate	Home Office	Consumer	Corporate	Home Office
Belarus	96	43	39	5,972	2,628	4,786
Bulgaria	124	15	30	10,166	1,919	2,742
Czech Republic	64	41	59	4,238	1,829	3,507
Hungary	71	56	47	3,742	6,578	3,935
Moldova	50	29	16	3,312	977	851
Poland	279	153	131	17,534	14,212	12,483
Romania	165	132	79	16,782	13,122	7,353
Russia	452	305	160	40,333	23,616	18,965
Serbia	5			732		
Slovakia	13	5		697	168	
Ukraine	524	291	135	48,914	29,377	8,566

Quantity

Month of Order Date

Data Source .Practice - line chart 3.Practice - scatter plot 01.Sales trend 02.Colored bar chart 03.Europe map Europe sales Floating dashboard Ism.01 Ism.02 Dashboard 3

144 marks 2 rows by 1 column SUM(Quantity): 108,758

New dashboard » Automatic Size » Use as Filter

Dashboard practice

A három szegmens eredményei Kelet-Európában

Country	Quantity			Sales		
	Consumer	Corporate	Home Office	Consumer	Corporate	Home Office
Belarus	10	1		287	32	
Bulgaria	22		6	1,133		1,571
Czech Republic	12	2	2	1,109	40	36
Hungary	6	25	1	170	1,559	32
Moldova	2		11	242		567
Poland	39	31	23	2,279	3,065	1,139
Romania	24	31	30	2,433	3,393	3,531
Russia	101	60	21	8,122	8,339	1,520
Slovakia	9	1		637	63	
Ukraine	98	11	34	10,359	858	

Year of Order Date

- (All)
- 2012
- 2013
- 2014
- 2015

3,229

Go to Sheet
Duplicate Sheet
Fit ►

Title
Caption
Legends ►

Filters ►

Disable Auto Update
Month of Order Date
Segment
Sum of Quantity
Sum of Sales
✓ Year of Order Date

Highlighters ►
Show Page Control
View Toolbar ►

Use as Filter
Ignore Actions

Floating

Select Container: Tiled
Deselect
Remove from Dashboard

Rename Dashboard Item...

Data Source .Practice - line chart 3.Practice - scatter plot 01.Sales trend 02.Colored bar chart 03.Europe map Europe sales Floating dashboard Ism.01 Ism.02

72 marks 2 rows by 1 column SUM(Quantity): 31,443

Line chart » Filters » Year of Order Date

Dashboard practice

A három szegmens eredményei Kelet-Európában

Country	Quantity			Sales	
	Consumer	Corporate	Home Office	All Using Related Data Sources	All Using This Data Source
Belarus	10	1			
Bulgaria	22		6		
Czech Republic	12	2	2	1,109	40
Hungary	6	25	1	170	1,559
Moldova	2		11	242	
Poland	39	31	23	2,279	3,065
Romania	24	31	30	2,433	3,393
Russia	101	60	21	8,122	8,339
Slovakia	9	1		637	63
Ukraine	98	11	34	10,359	858

Sales

The chart displays monthly sales data for three segments. The Y-axis represents Sales in thousands, ranging from 0K to 150K. The X-axis represents the Month of Order Date [2012]. The Consumer segment shows the highest sales, peaking in November at approximately 150K. The Corporate segment follows, peaking in September at about 80K. The Home Office segment has the lowest sales, peaking in September at around 50K.

Quantity

The chart displays monthly quantity data for three segments. The Y-axis represents Quantity, ranging from 0K to 150K. The X-axis represents the Month of Order Date [2012]. The Consumer segment shows the highest quantity, peaking in June at approximately 10K. The Corporate segment follows, peaking in June at about 5K. The Home Office segment has the lowest quantity, peaking in June at around 2K.

Month of Order Date [2012]

Filter menu » Apply to Worksheets » Selected Worksheets...

Year of Order Date
X Year of Order Date
X (All)
X 2012

Edit Filter...
Apply to Worksheets
Format Filter and Set Controls...
Customize
Show Title
Edit Title...
Single Value (list)
Single Value (dropdown)
Single Value (slider)
Multiple Values (list)
Multiple Values (dropdown)
Multiple Values (custom list)
Only Relevant Values
All Values in Database
Include Values
Exclude Values
Floating
Fix Height
Edit Height...
Select Container: Vertical
Deselect
Remove from Dashboard
Rename Dashboard Item...

Dashboard Layout Device Preview Size Sheets Objects Tiled Floating Show dashboard title Data Source .Practice - line chart 3.Practice - scatter plot 01.Sales trend 02.Colored bar chart 03.Europe map Europe sales Floating dashboard Ism.01 Ism.02 Dashboard 3

Filter menu » Apply to Worksheets » Selected Worksheets...

Summary

Summary

- Create custom hierarchies
- Organize sheets on a tiled dashboard
- Add dashboard filters
- Flexible sheet layout on a floating dashboard
- Additional dashboard objects

Next lesson

Data transformation

- Practice
- Group data
- Simple calculated fields
- Quick Table Calculations
- Using parameters

Home assignment

Use Global Superstore as the data source.

Create a tiled dashboard with two visualisations:

- A trendline with European (**Market**) **Sales** numbers by **Regions** for every month (**Order Date**).
- A data table with every **Countries** in Europe. Show **Sales** for the three customer **Segments** with the total numbers for each country in the rows.

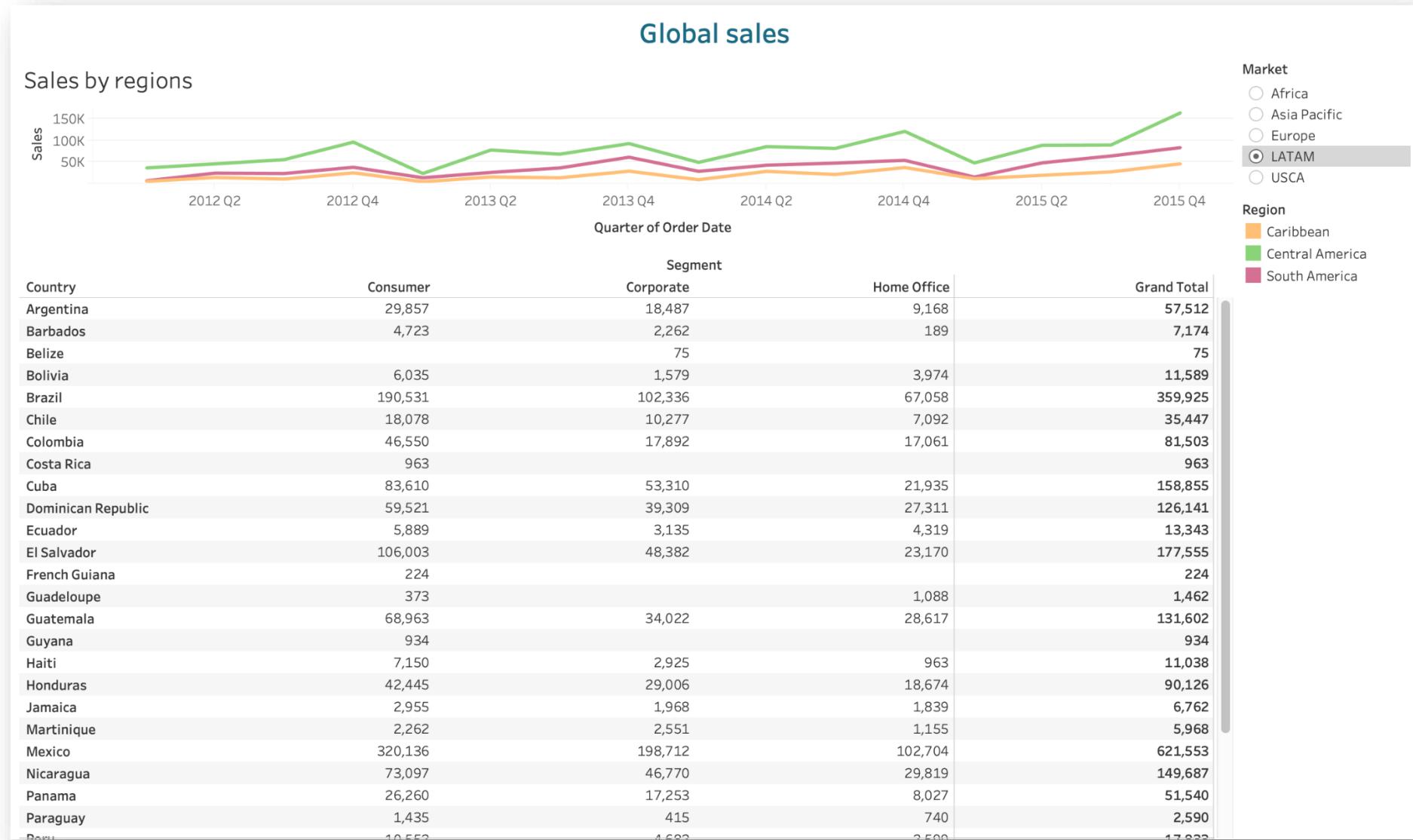
next...

Home assignment

Create a dashboard and organise the sheets according to the picture on the next slide:

- The dashboard should fill the whole display automatically.
- The table should fill its tile in width and you should be able to scroll it.
- You should filter the data table by clicking on the line chart.
- Add an interactive filter to the dashboard where you can select any other Market instead of Europe.
- Upload your work to Tableau Online.

Home assignment



Thank you