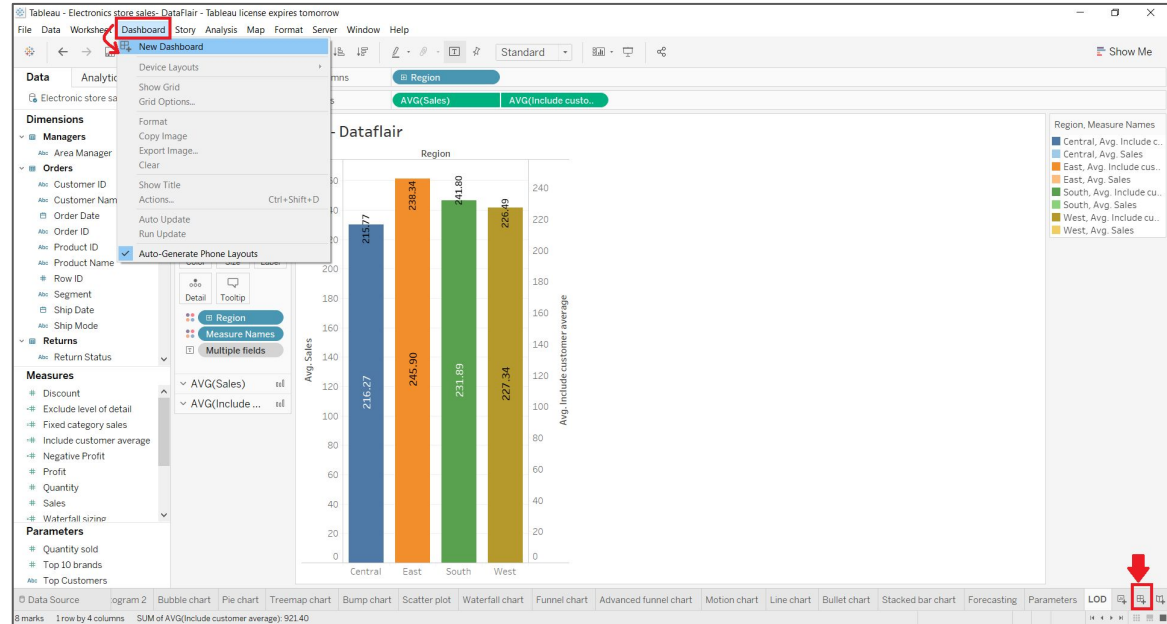


# Dashboard And Stories

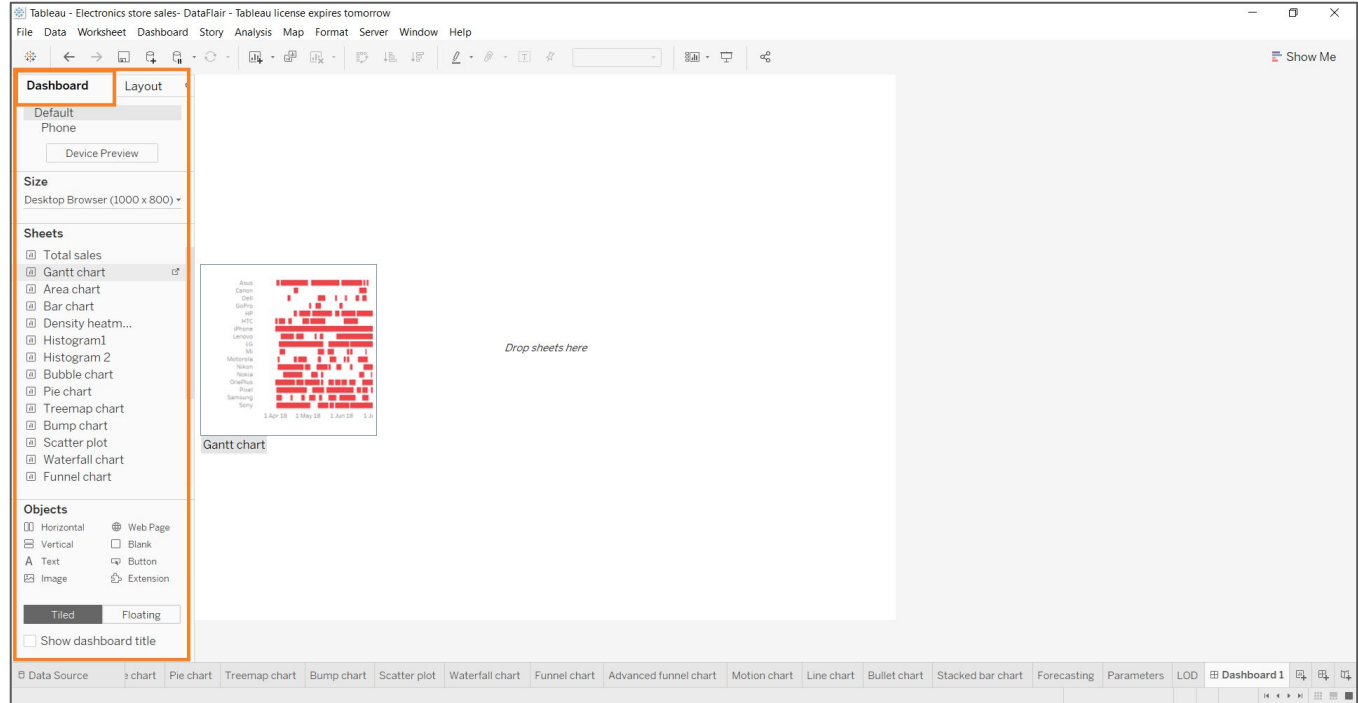
# Creating a Dashboard in Tableau

- A dashboard is a collection of different kinds of visualizations or views that we create on Tableau. We can bring together different elements of multiple worksheets and put them on a single dashboard.
- The dashboard option enables us to import and add charts and graphs from worksheets to create a dashboard. On a dashboard, we can place relevant charts and graphs in one view and analyze them for better insights.

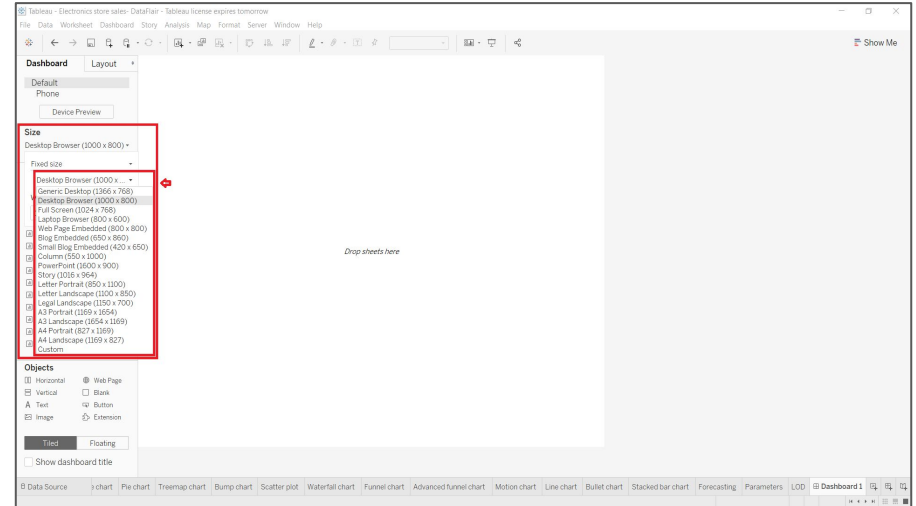
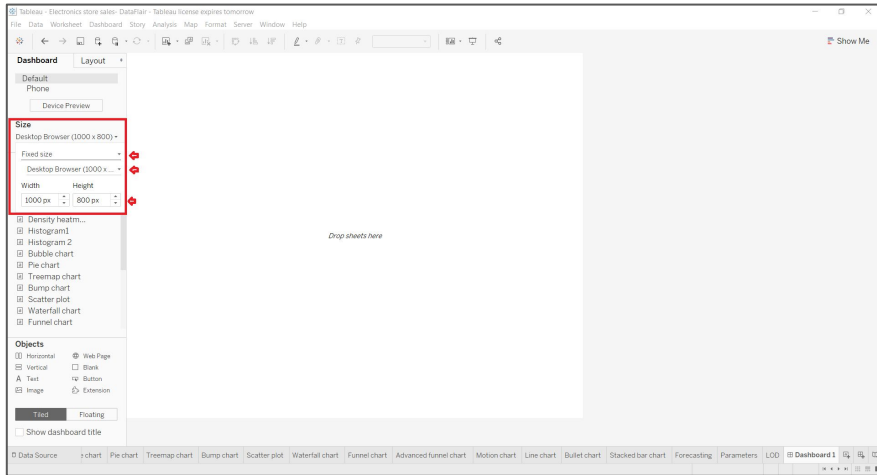


# Dashboard pane

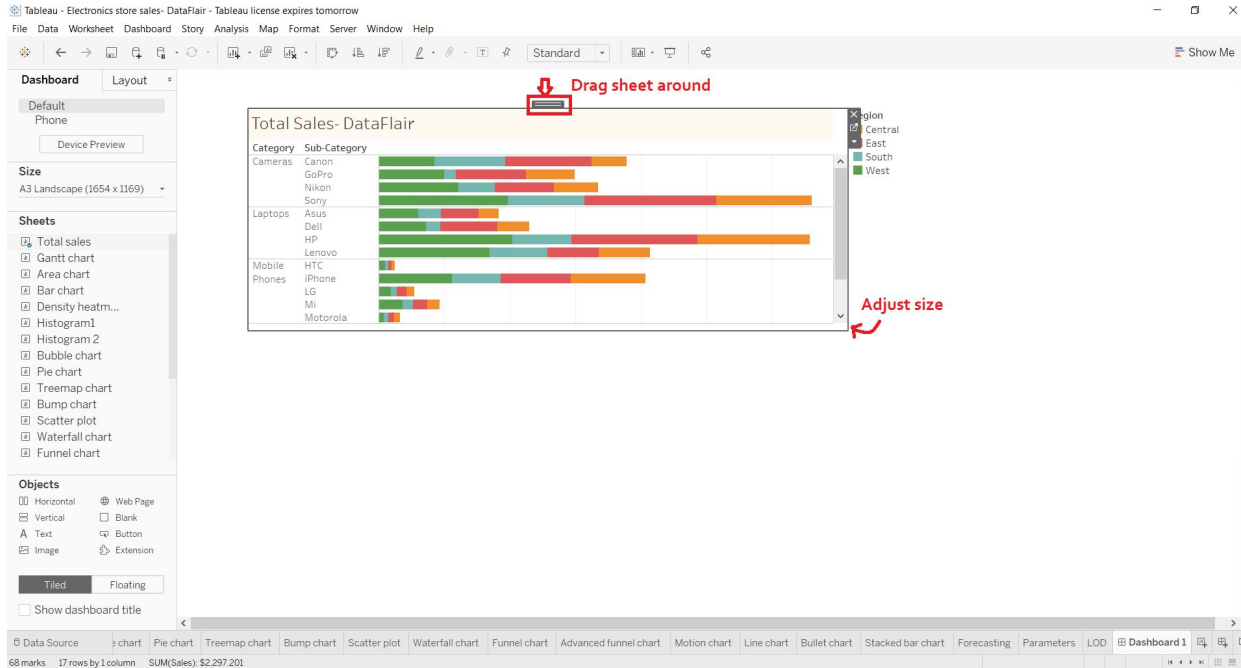
In the window where we can create our dashboard, we get a lot of tabs and options related to dashboarding. On the left, we have a *Dashboard* pane which shows the dashboard size, list of available sheets in a workbook, objects, etc.



From the Dashboard tab, we can set the size of our dashboard. We can enter custom dimensions like the width and height of the dashboard as per our requirements.

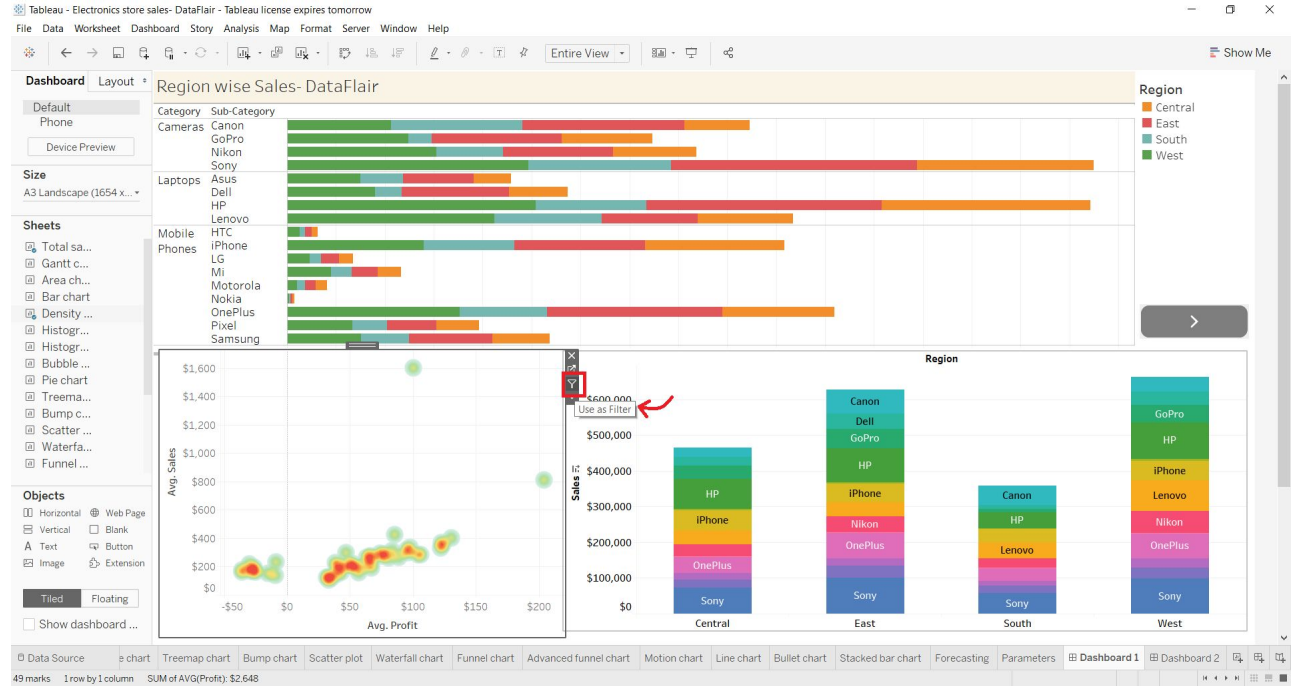


**Adding Sheets:** Have a look at the picture below to see how you can drag a sheet or visual around on the dashboard and adjust its size.



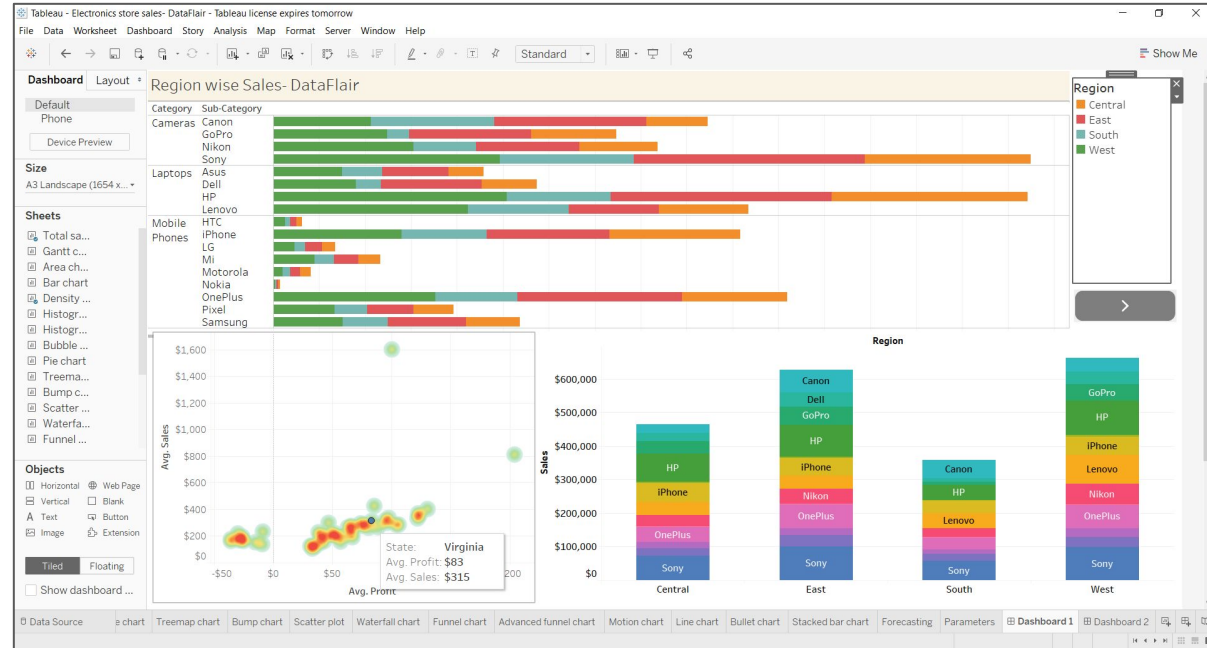
# Adding More sheets in dashboard

In a similar way, we can add as many sheets as we require and arrange them on the dashboard properly.



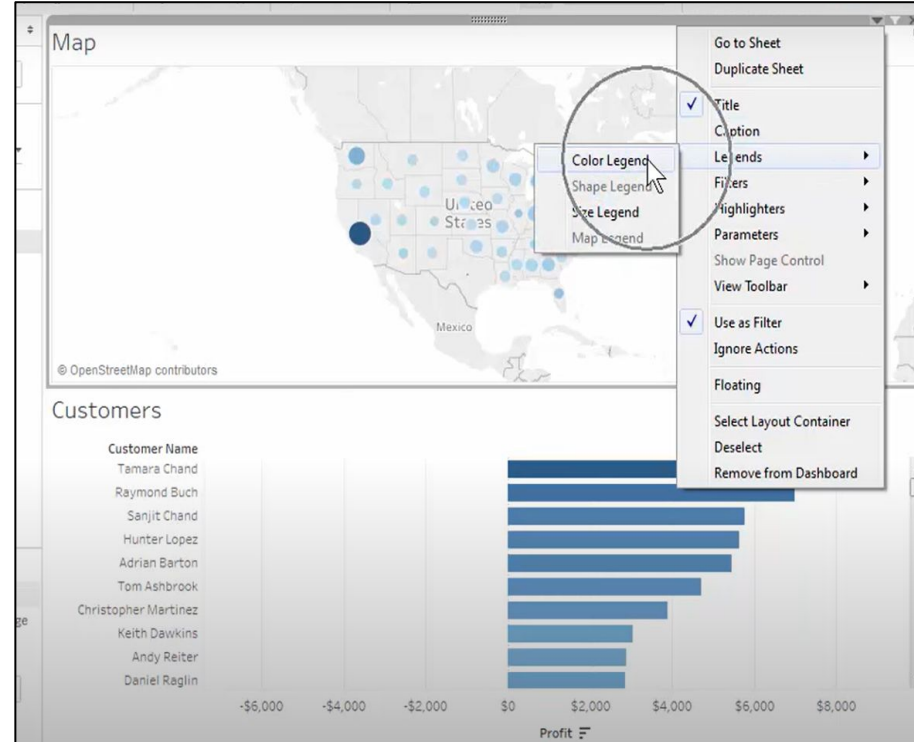
# Filters in dashboard

- Also, you can apply the filter or selections on one graph and treat it like a filter for all the other visuals on the dashboard.
- To add a filter to a dashboard in Tableau, select Use as Filter option given on the right of every visual.



## Showing Legends on Dashboards

1. On the dashboard, click the sheet to select it.
2. Click the drop-down arrow at the top right of the sheet and select **Legends**.
3. Select the legend you wish to display.





## Open a web page with a URL action

1. On a worksheet, select **Worksheet** > **Actions**. From a dashboard, select **Dashboard** > **Actions**.
  2. In the Actions dialog box, click **Add Action** and then select **Go to URL**.
  3. In the next dialog box, enter a name for the action. To enter field variables in the name, click the **Insert** menu to the right of the **Name** box.
- Use the drop-down list to select a source sheet or data source. If you select a data source or dashboard you can select individual sheets within it.

If you choose this option...	The action is run when the user...
Hover	Mouses over a mark in the view. This option works best for highlight actions within a dashboard.
Select	Clicks a mark in the view. This option works well for all types of actions.
Menu	Right-clicks (control-clicks on Mac) a selected mark in the view, then clicks an option in a tooltip (menu). This option works particularly well for URL actions.

For URL Target, specify where the link will open:

- New Tab if No Web Page Object Exists — Ensures that the URL opens in a browser on sheets that lack web page objects. This is a good choice when Source Sheets is set to All or a data source.
- New Browser Tab — Opens in the default browser.
- Web Page Object — (Available only for dashboards with Web Page objects) Opens in the web page object you select.

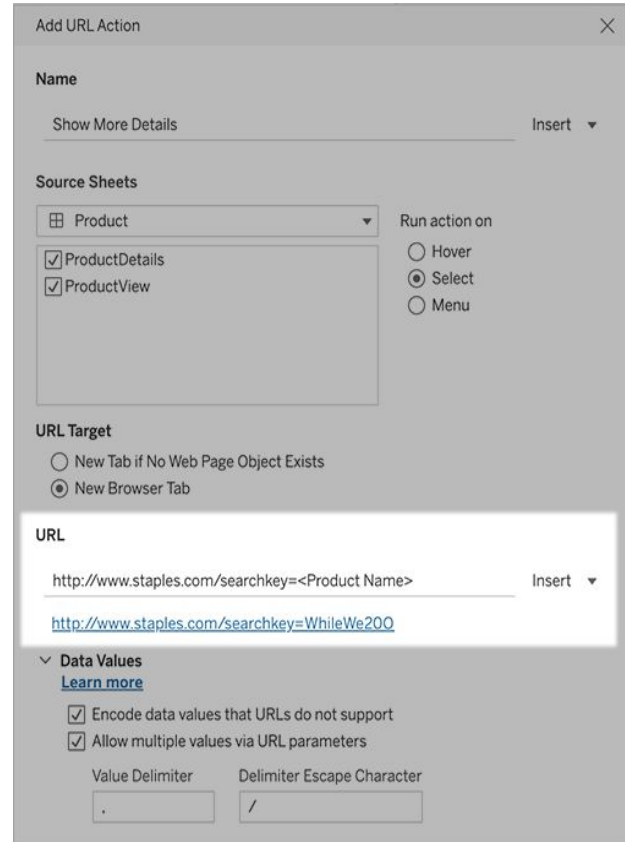
**URL Target**

- ☐ New Tab if No Web Page Object Exists
- ☐ New Browser Tab
- ☒ Web Page Object

 en.wikipedia.org ▼

## Enter a URL

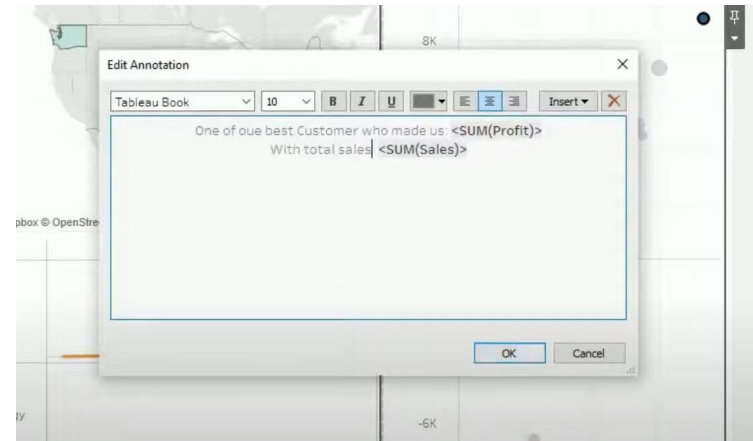
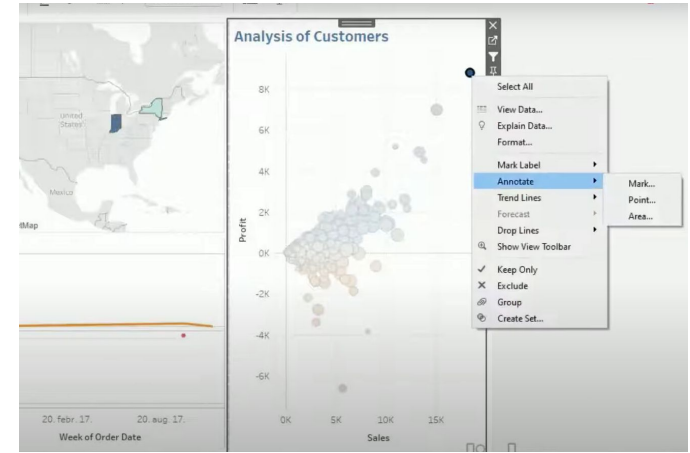
- The URL should start with one of the following prefixes: http, https, ftp, mailto, news, gopher, tsc, tsl, sms, tel, file
- Tableau Desktop also supports local paths like C:\Example folder\example.txt
- To enter field and filter values as dynamic values in the URL, click the **Insert** menu to the right of the URL. Be aware that any referenced fields must be used in the view. For details, see Using field and filter values in URLs.



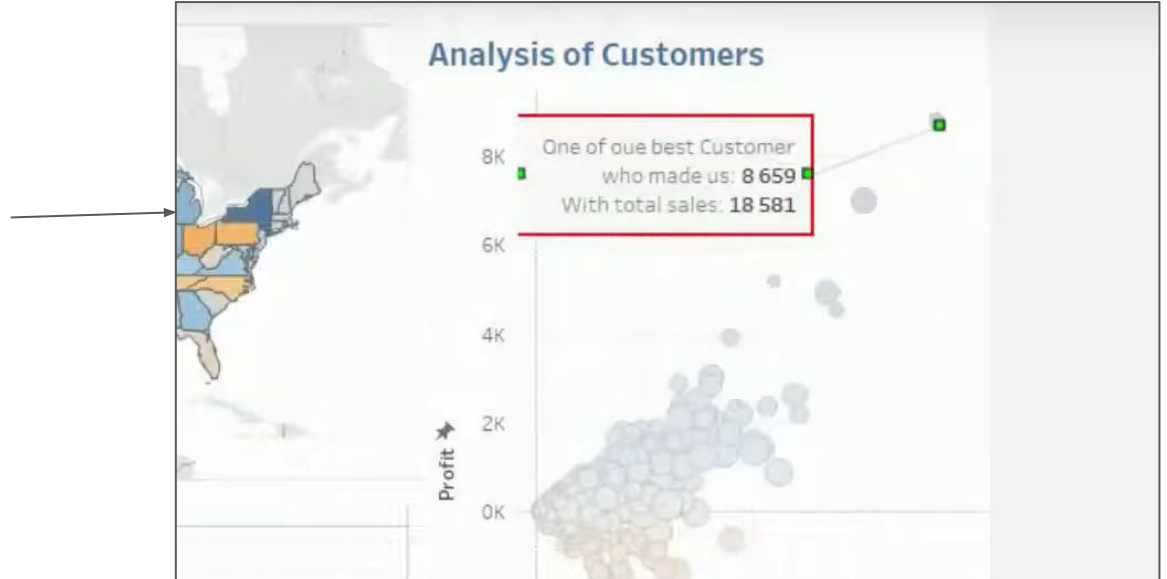
The screenshot shows the 'Add URL Action' dialog box. It has a title bar with a close button. The 'Name' section has a 'Show More Details' link and an 'Insert' dropdown menu. The 'Source Sheets' section has a dropdown menu showing 'Product' and a list of sheets: 'ProductDetails' and 'ProductView', both of which are checked. To the right of this list are radio buttons for 'Run action on': 'Hover', 'Select' (which is selected), and 'Menu'. The 'URL Target' section has radio buttons for 'New Tab if No Web Page Object Exists' and 'New Browser Tab' (which is selected). The 'URL' section has a text input field containing 'http://www.staples.com/searchkey=<Product Name>' and an 'Insert' dropdown menu. Below this, a preview of the URL is shown: 'http://www.staples.com/searchkey=WhileWe200'. The 'Data Values' section has a 'Learn more' link and two checked checkboxes: 'Encode data values that URLs do not support' and 'Allow multiple values via URL parameters'. At the bottom, there are two input fields: 'Value Delimiter' with a period '.' and 'Delimiter Escape Character' with a forward slash '/'.

## Annotation in Dashboard :

- Go to dashboard page Click on filter > select annotate > click Point.
- Window will pop up > then you can Edit the text to annotate the visualization.

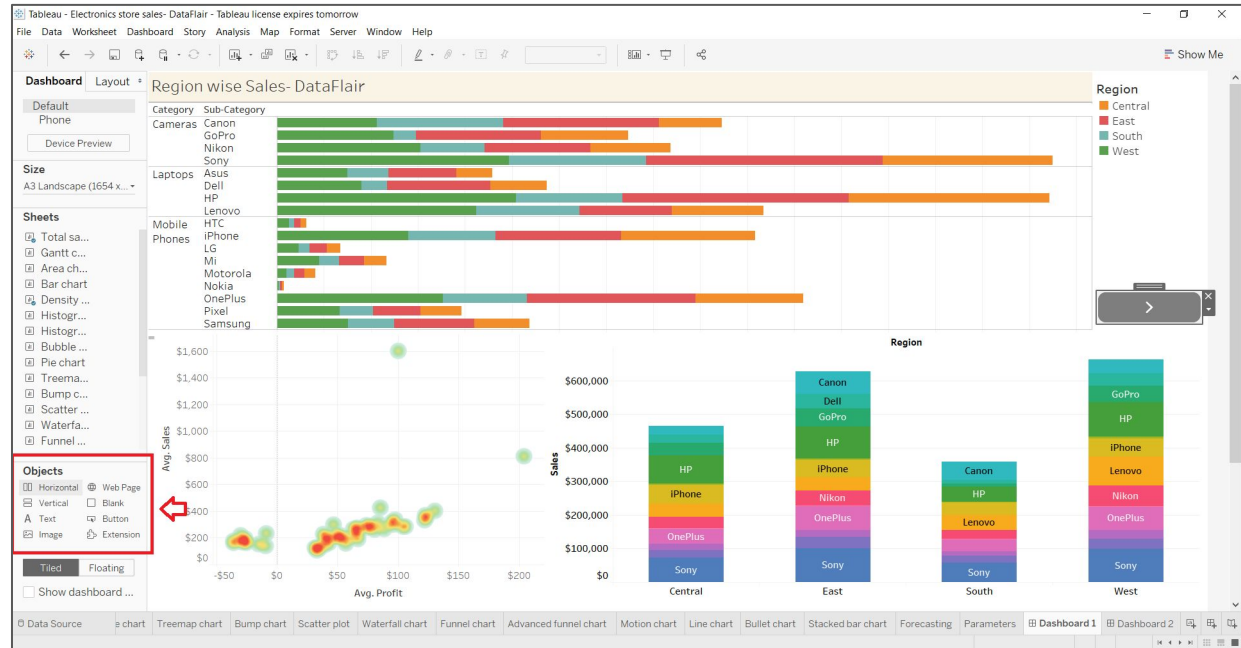


Lets have look of annotation !!

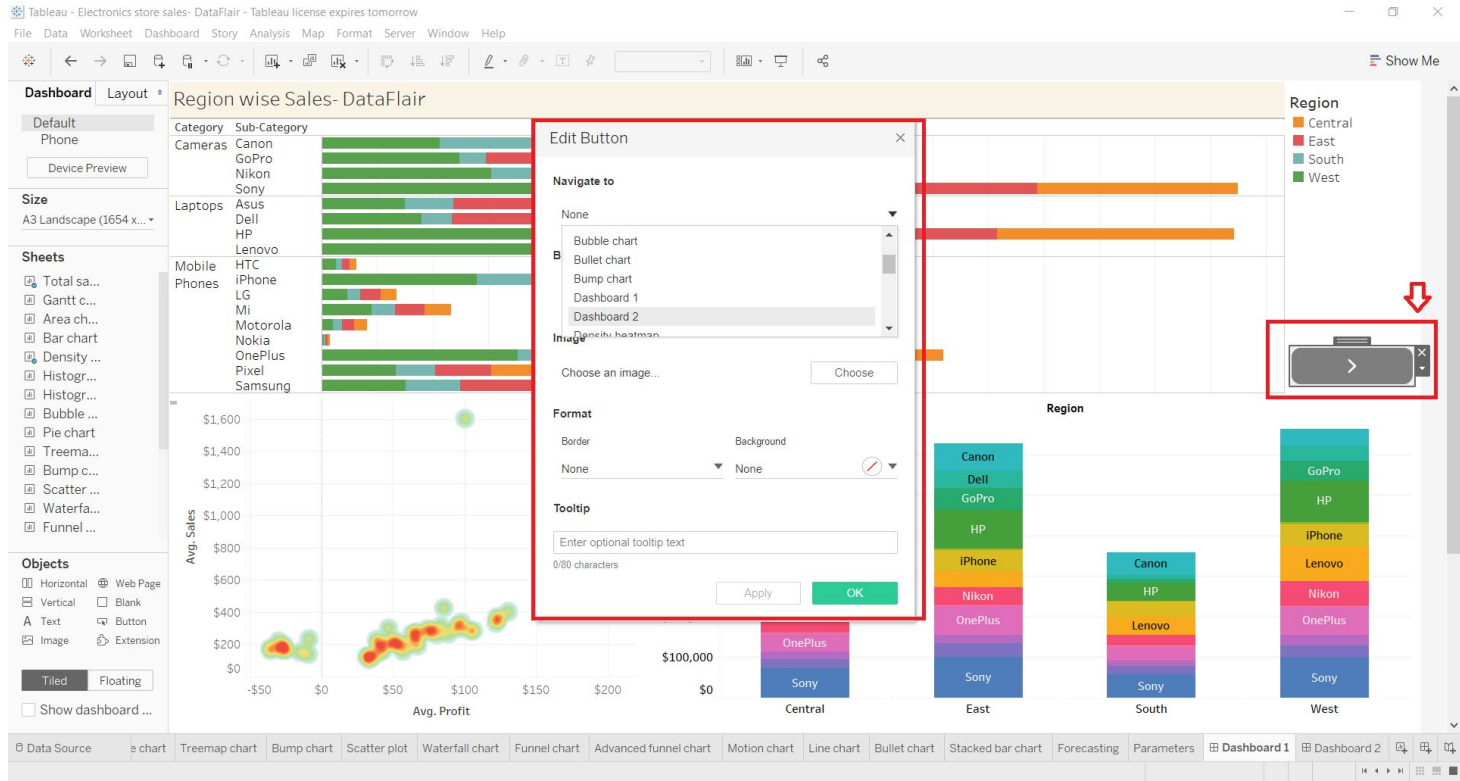


# Adding objects

Another set of tools that we get to make our dashboard more interactive and dynamic is in the Objects section. We can add a wide variety of objects such as a web page, button, text box, extension, etc.



From the objects pane, we can add a button and also select the action of that button, that is, what that button should do when you click on it. Select the Edit Button option to explore the options you can select from for a button object.



The screenshot shows the Tableau Desktop interface with a dashboard titled "Region wise Sales- DataFlair". The dashboard displays a horizontal bar chart showing sales by region (Central, East, South, West) for various products. A red box highlights the "Edit Button" dialog box, which is open over the dashboard. The dialog box has tabs for "Navigate to", "Image", and "Format". The "Navigate to" tab is selected, showing a list of actions: None, Bubble chart, Bullet chart, Bump chart, Dashboard 1, and Dashboard 2. The "Image" tab shows a preview of a button with a right arrow. The "Format" tab shows options for border, background, and tooltip text. A red arrow points to a button object on the dashboard, which is highlighted by a red box.

**Tableau - Electronics store sales- DataFlair - Tableau license expires tomorrow**

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

**Dashboard** Layout

Default  
Phone  
Device Preview

**Size**  
A3 Landscape (1654 x...)

**Sheets**

- Total sa...
- Gantt c...
- Area ch...
- Bar chart
- Density ...
- Histogr...
- Bubble ...
- Pie chart
- Treema...
- Bump c...
- Scatter ...
- Waterfa...
- Funnel ...

**Objects**

- Horizontal
- Vertical
- Blank
- Text
- Image
- Web Page
- Blank
- Extension

Tiled Floating

Show dashboard ...

**Region wise Sales- DataFlair**

Category Sub-Category

Cameras Canon GoPro Nikon Sony

Laptops Asus Dell HP Lenovo

Mobile Phones HTC iPhone LG Mi Motorola Nokia OnePlus Pixel Samsung

Avg. Sales

Avg. Profit

**Region**

- Central
- East
- South
- West

**Edit Button**

**Navigate to**

- None
- Bubble chart
- Bullet chart
- Bump chart
- Dashboard 1
- Dashboard 2

**Image**

Choose an image... Choose

**Format**

Border Background

None None

**Tooltip**

Enter optional tooltip text

0/80 characters

Apply OK

**Dashboard 1**

Dashboard 2

Dashboard 3

Dashboard 4

Dashboard 5

Dashboard 6

Dashboard 7

Dashboard 8

Dashboard 9

Dashboard 10

Dashboard 11

Dashboard 12

Dashboard 13

Dashboard 14

Dashboard 15

Dashboard 16

Dashboard 17

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Dashboard 100



# Final Dashboard

Now, we move towards making a final dashboard in Tableau with all its elements in place



# What are Tableau Stories?

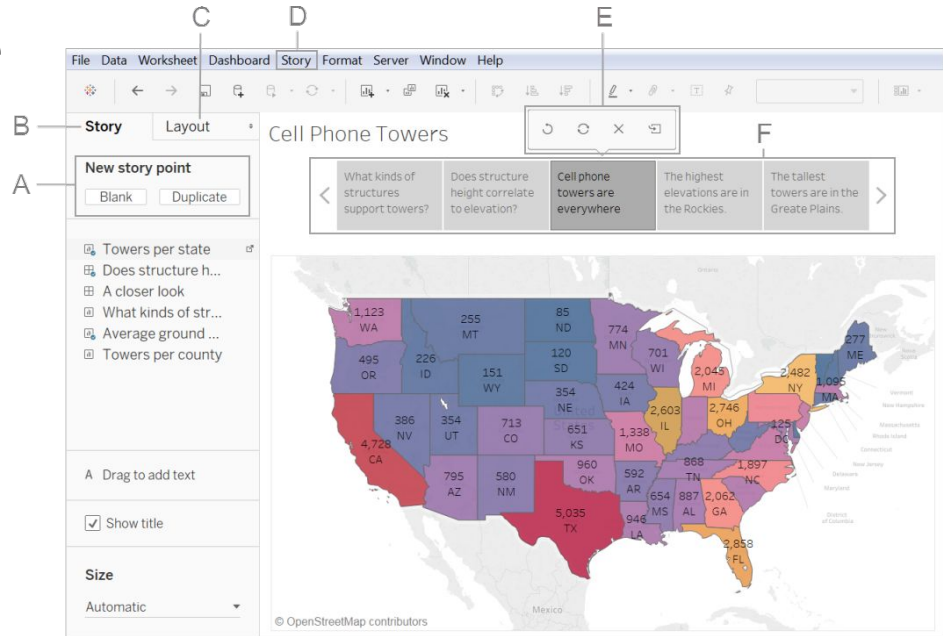
- Well, it is a sequence of different charts that combine to provide a cohesive plot to its viewers. In essence, all these charts tell a story about the data which allows the viewers to form their conclusion. The story in Tableau contains story points, where each story point is either a worksheet or a dashboard.
- When you share a story—for example, by publishing a workbook to Tableau Public, Tableau Server, or Tableau Cloud—users can interact with the story to reveal new findings or ask new questions of the data.

## A. Options for adding a new story point:

Choose **Blank** to add a new point or **Duplicate** to use the current story point as the starting place for your next point.

**B. The Story pane:** Use this pane to drag dashboards, sheets, and text descriptions to your story sheet. This is also where you set the size of your story and display or hide the title.

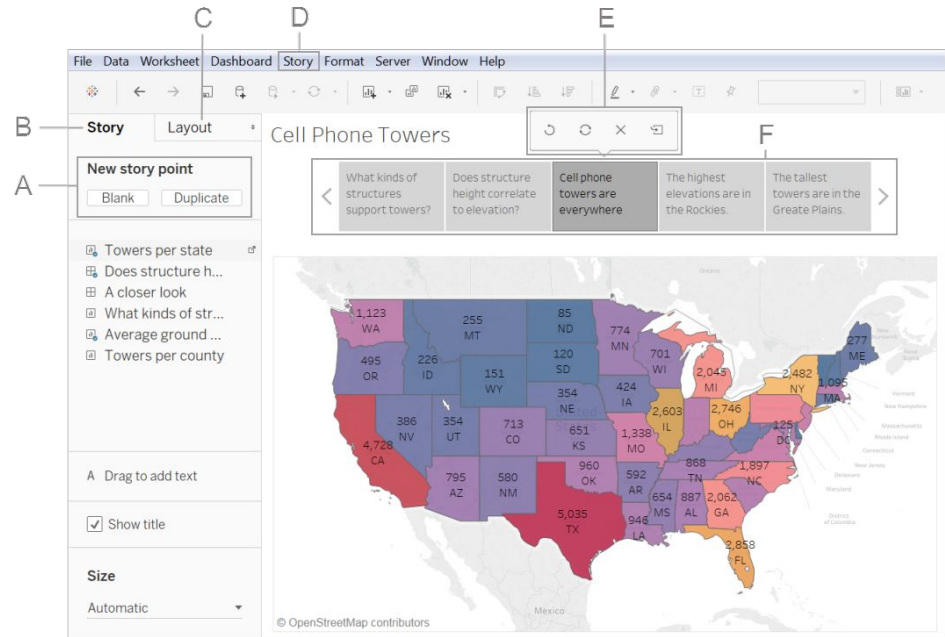
**C. The Layout pane:** This is where you choose your navigator style and display or hide the forward and back arrows.



D. The Story menu: Use this menu in Tableau Desktop to format the story or copy or export the current story point as an image. You can also clear the entire story here or show or hide the navigator and story title.

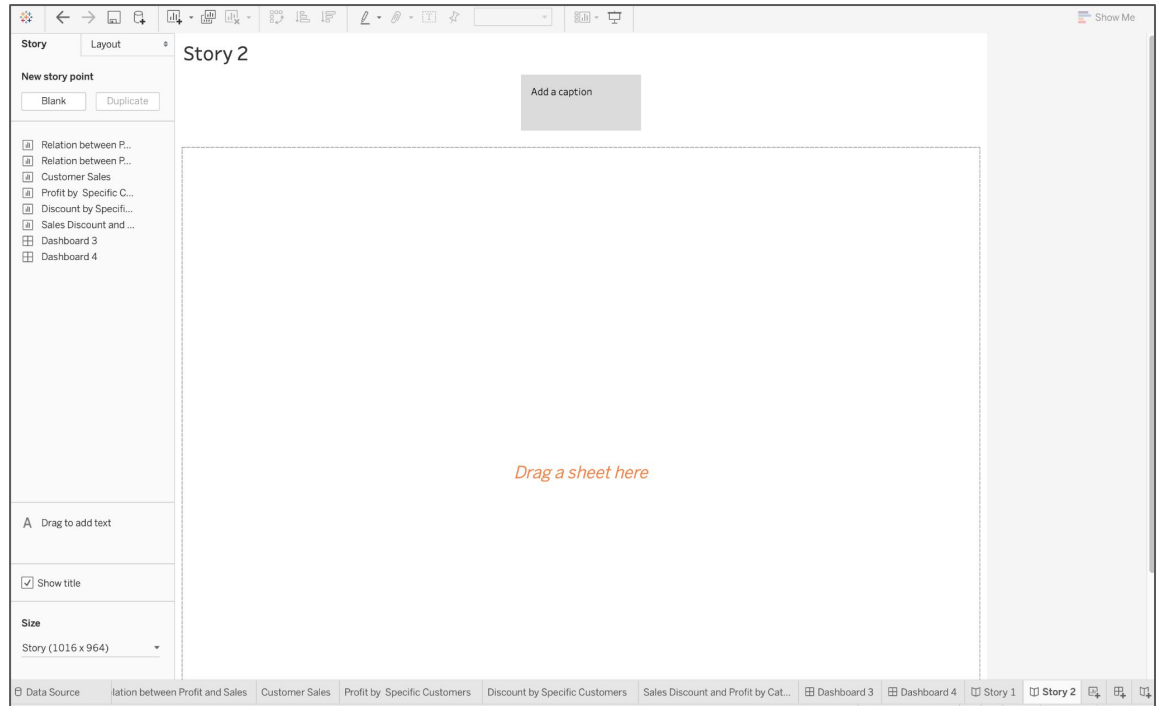
E. The Story toolbar: This toolbar appears when you mouse-over the navigator area. Use it to revert changes, apply updates to a story point, delete a story point, or create a new story point out of the current, customized one.

F. The navigator: The navigator allows you to edit and organize your story points. It's also how your audience will step through your story. To change the style of the navigator, use the Layout pane.

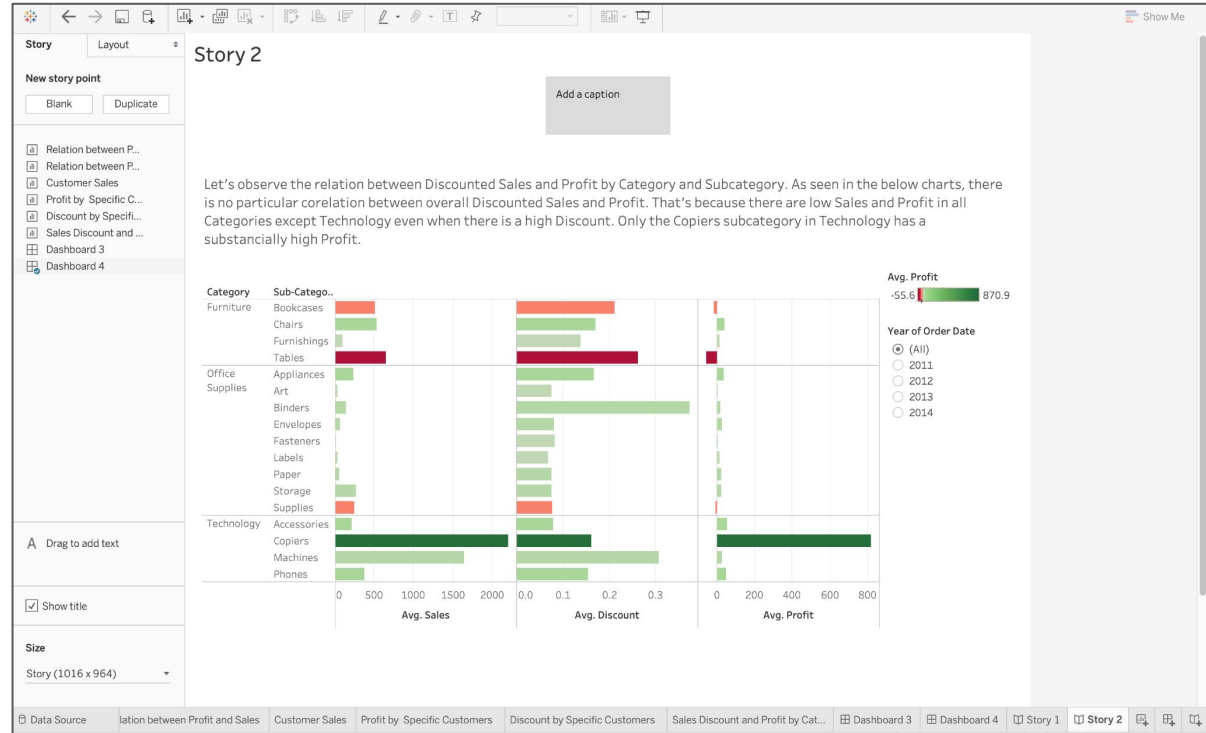


# How to create a Story? .

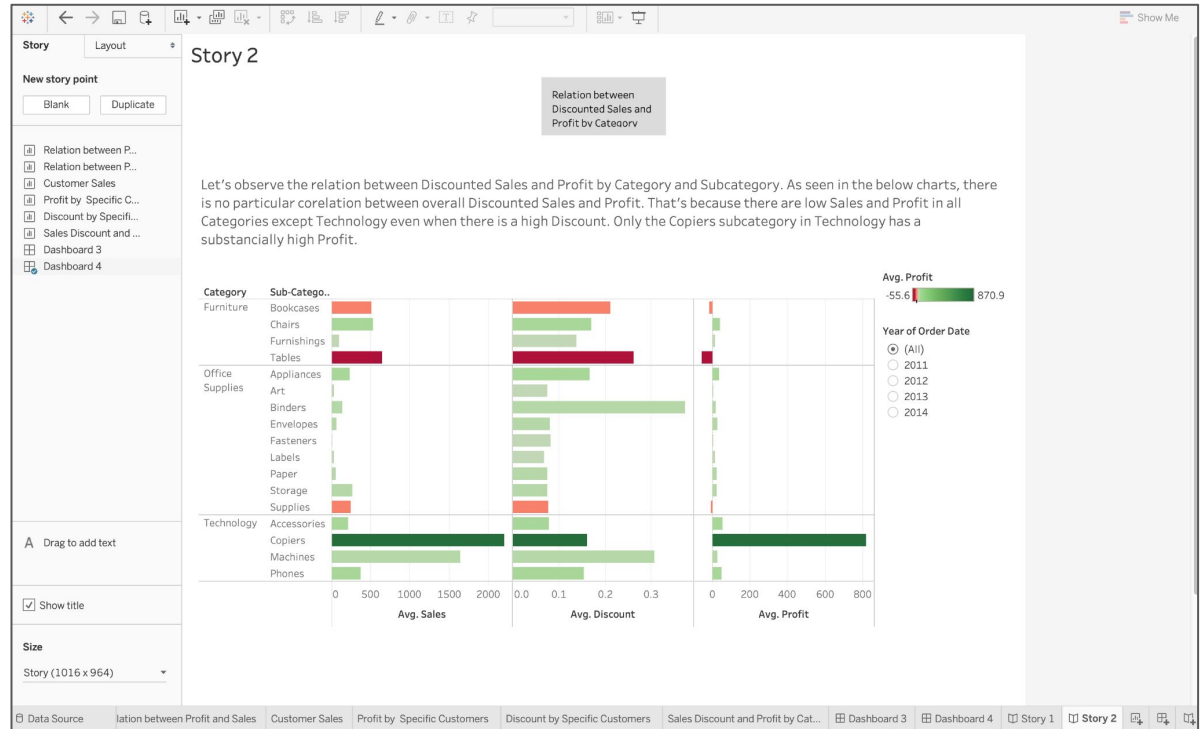
**Step 1:** Click on the new Story tab to create a new story. You can then add various sheets and dashboards to create a story point.



**Step 2:** To start building your story, double-click a sheet on the left to feature it to your story purpose

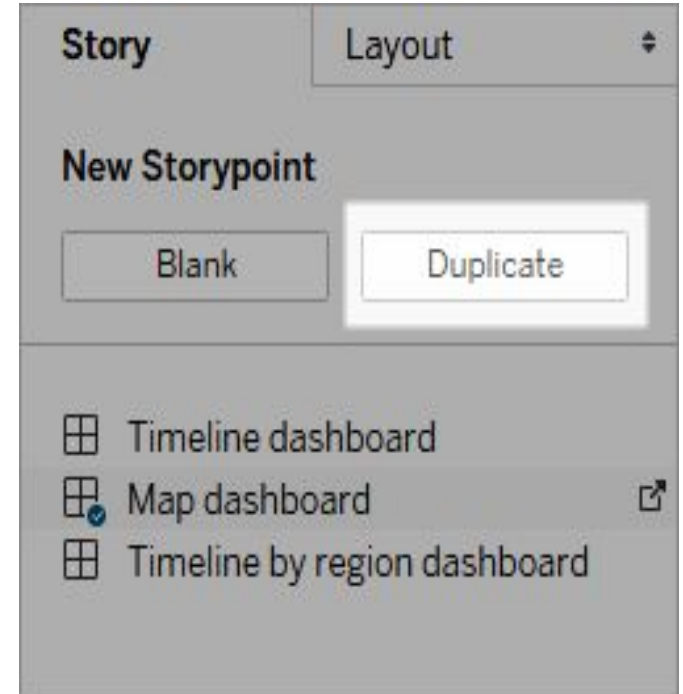


Step 3: We can also add a caption to summarize the story point by clicking on “Add a caption” and then writing it. Let’s add the caption “Relation between Discounted Sales and Profit by Category and Subcategory” to our example.



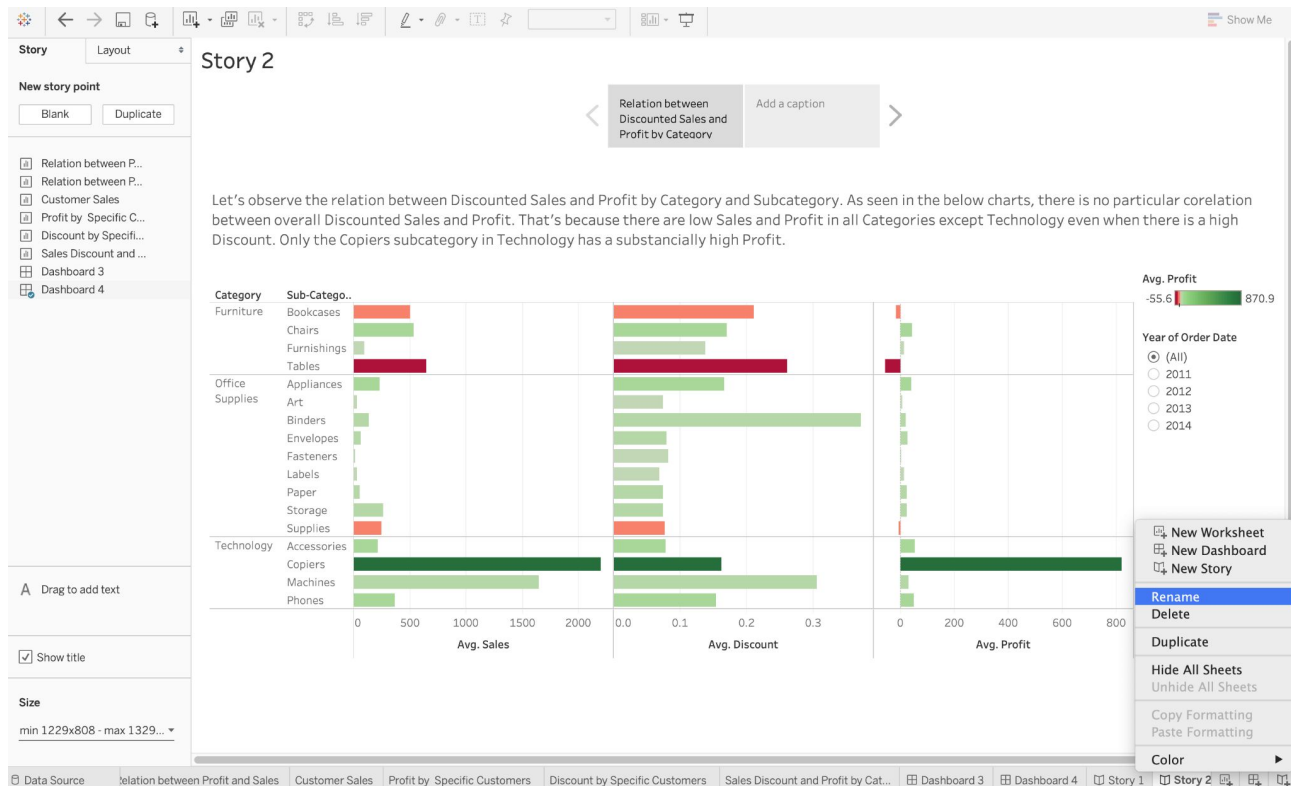
Starting with your next story point, you'll use the drill-down technique in order to narrow down the scope of the story and keep the narrative moving.

1. To use your first story point as a baseline for your next, click Duplicate under New Storypoint on the left.





You can change the size of your story by clicking on the Size option in the lower-left corner. You can choose from one of the predefined sizes or set your custom size in pixels. You can also change the name of your story by right-clicking on your Story tab and choosing rename.



# Final Story :

Examine your work! Take a look at “Finishing touches” in action.

