

Creating Interactive Dashboards in Tableau Public: Unlock Insights with Ease

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ENGL 202C





Purpose & Learning Objectives

Purpose of These Instructions

- To guide beginners through creating an interactive data visualization dashboard using Tableau Public
- To help users confidently explore, analyze, and share data visually

By the end of this tutorial, you will be able to:

- Import a dataset into Tableau Public
- Create basic charts (bar, line, map, etc.)
- Combine charts into a dashboard
- Add filters and interactivity
- Publish and share a dashboard publicly



Audience & Prerequisites

Intended Audience

- Beginners and students with little to no experience using Tableau
- Novice data analysts and data science students

Prerequisites

- A computer with internet access
- Tableau Public installed (free)
- A basic dataset (CSV or Excel file)
- No prior Tableau dashboard experience required

public.tableau.com

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Tools & Materials Needed

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- Tableau Public (free desktop version)
- Dataset file (CSV or Excel with column headers)
- Stable internet connection
- Computer with at least **4 GB RAM (8 GB recommended)**
- Tableau Public account (for publishing)

Viz of the Day

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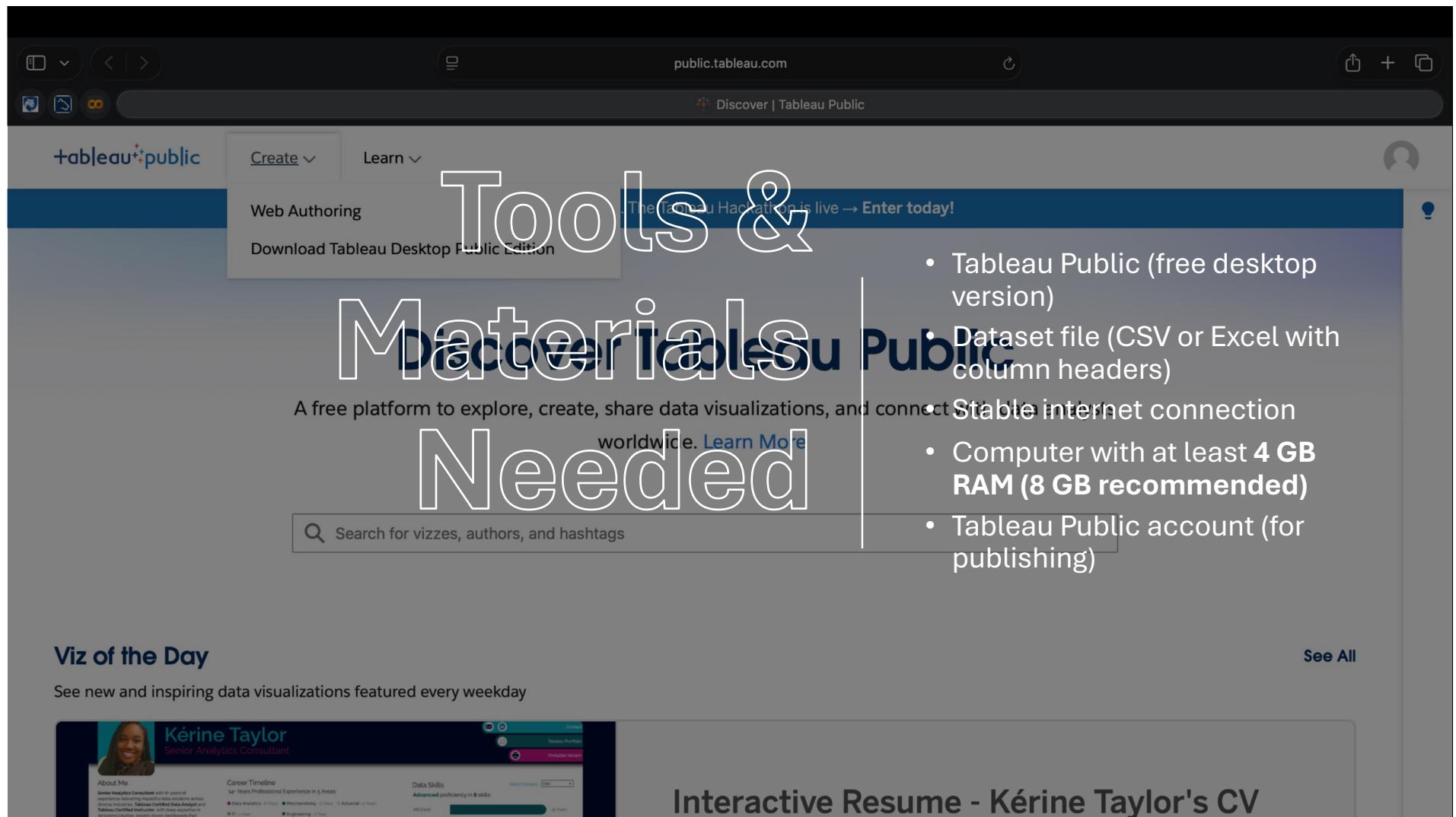
Kérine Taylor
Senior Analytics Consultant

About Me

Career Timeline

Data Skills

Interactive Resume - Kérine Taylor's CV





Warnings & Important Notes



Dashboards published to Tableau Public are **visible to everyone**



Do not upload sensitive, private, or proprietary data



Save your work frequently to avoid data loss



Tableau Public requires an internet connection to publish dashboards



Some features may differ from Tableau Desktop (paid version)

Dashboard Creation Workflow

Sheet 1

Drop field here

Add data to visualize
Double-click or drag fields from the sidebar

1. Open Tableau Public and connect to data
2. Explore and prepare the dataset
3. Create individual charts (worksheets)
4. Build a dashboard
5. Add filters and interactivity
6. Publish and share the dashboard

Step 1: Open Tableau Public and Connect to Data

Step 1: Open Tableau Public

- Launch Tableau Public on your computer
- Sign in to your Tableau Public account

Connect to a Data Source

- Click **Text File** (for CSV) or **Microsoft Excel**
- Locate and open your dataset file
- Verify that fields appear correctly in the Data pane

Note: Tableau automatically detects data types, but you should confirm dimensions and measures before proceeding.

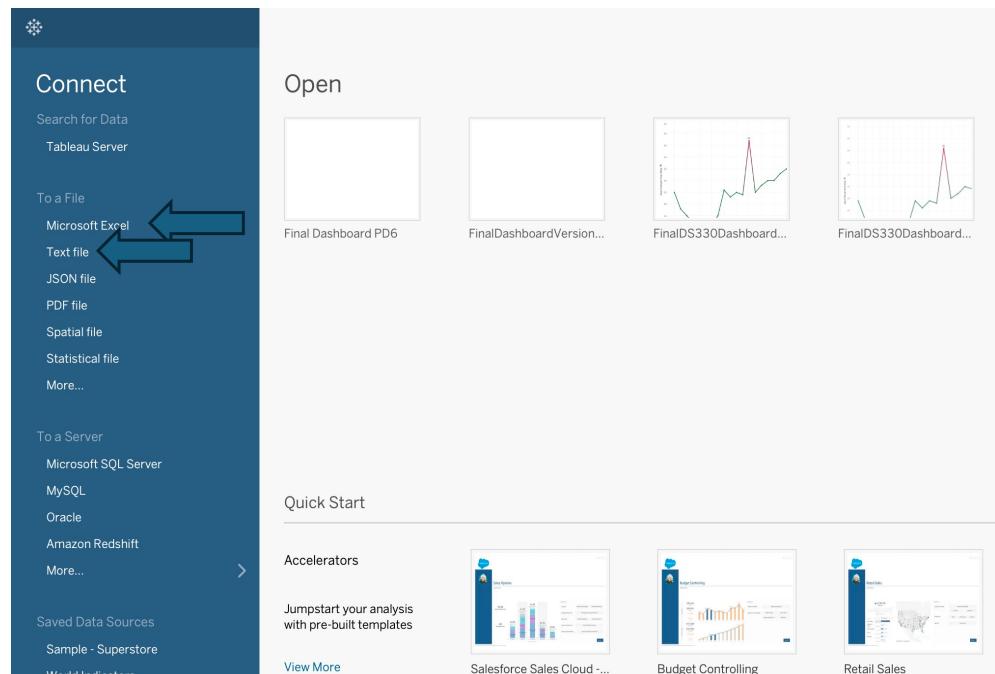


Figure 1. Tableau Public start screen showing data connection options.

Step 2: Understand the Tableau Workspace

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Key Interface Areas:

- **Data Pane:** Lists available dimensions and measures
- **Rows and Columns Shelves:** Control chart structure
- **Marks Card:** Adjust color, size, labels, and tooltips
- **Filters Shelf:** Limit the data displayed
- **Show Me Panel:** Suggests chart types

Note: Understanding where tools are located will make chart creation easier in later steps.

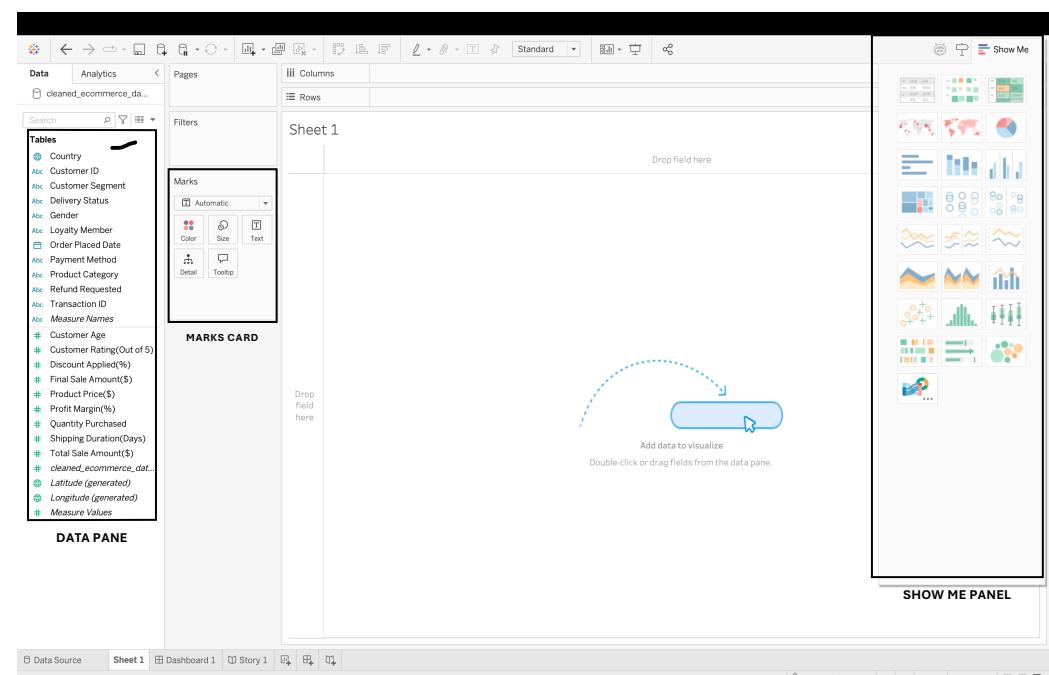


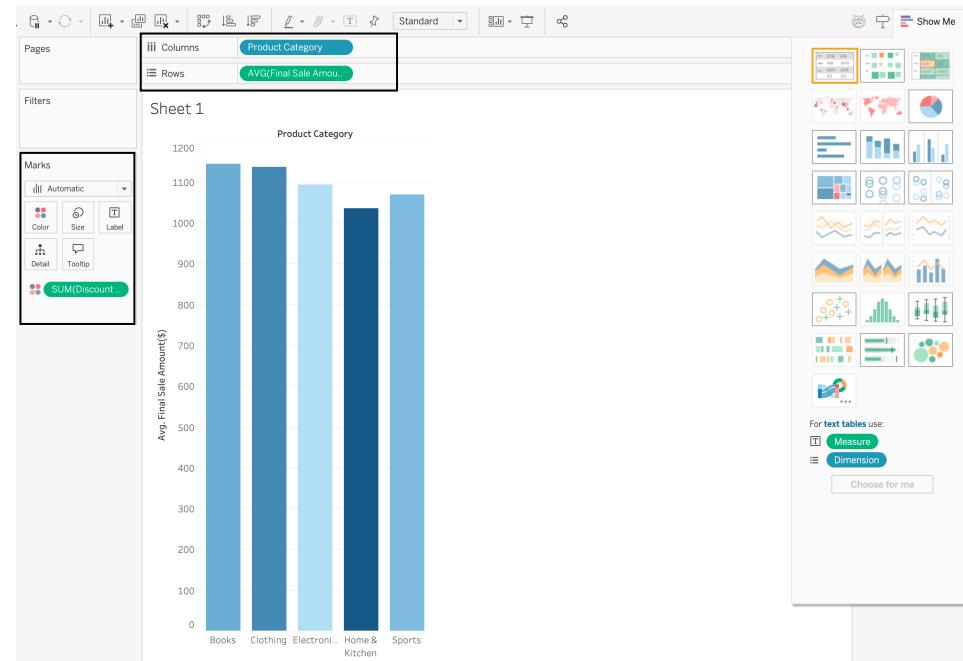
Figure 2. Tableau worksheet interface highlighting key workspace components

Step 3: Create Your First Chart (Worksheet)

Step 3: Create a Basic Chart

- Drag a dimension (e.g., **Category**) to Columns
- Drag a measure (e.g., **Sales**) to Rows
- Use the Show Me panel to select a chart type
- Use the Marks card to refine colors, labels, and tooltips

Note: Start with simple charts before adding interactivity.



Step 4: Add Filters and Interactivity

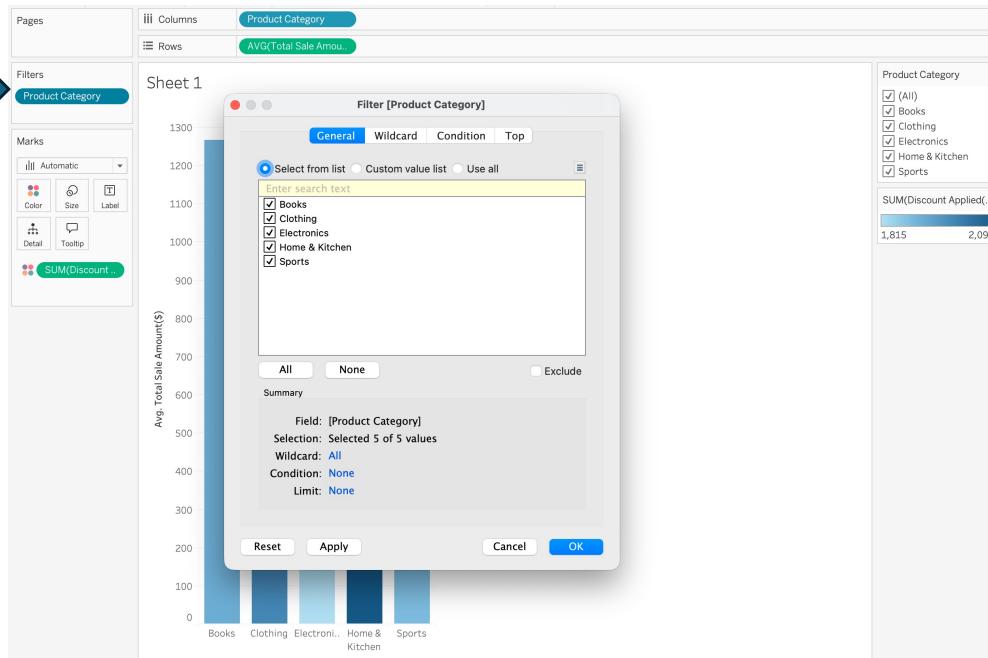
Step 4: Add Filters

- Drag a field (e.g., **Category** or **Region**) to the **Filters** shelf
- Choose filter values and click **OK**
- Right-click the filter and select **Show Filter**

Add Interactivity

- Customize the filter type (dropdown, slider, checkbox)
- Apply filters to **all worksheets** if needed
- Test interactivity by clicking and adjusting filters

Note: Filters allow users to explore data dynamically without changing the underlying chart.

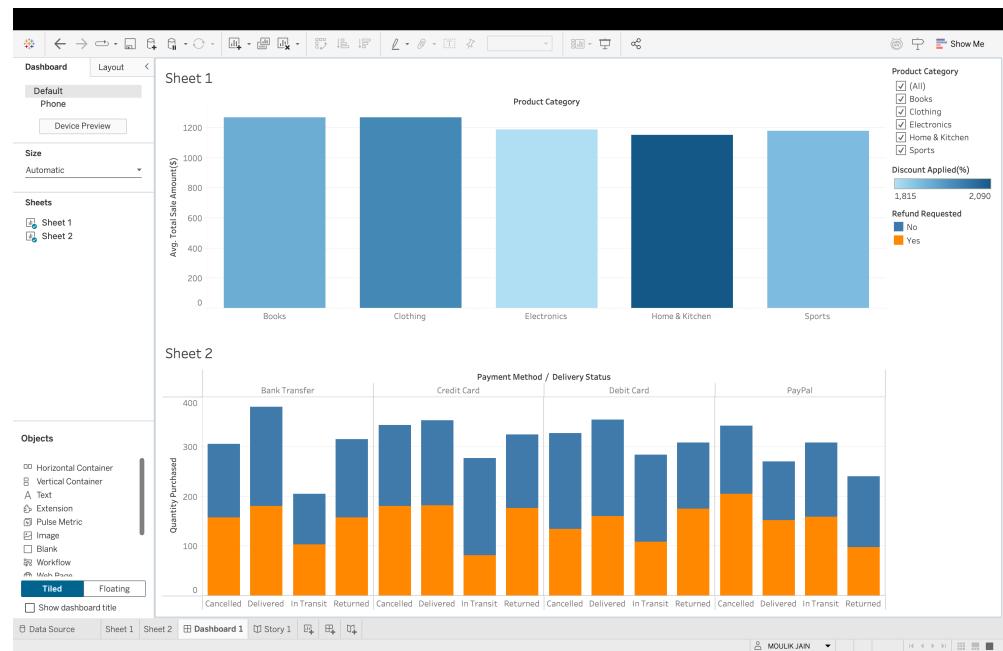


Step 5: Build the Dashboard

Step 5: Combine Worksheets into a Dashboard

- Click **New Dashboard** at the bottom of Tableau
- Set the dashboard **Size** (Automatic or Fixed)
- Drag worksheets from the **Sheets** panel into the canvas
- Arrange charts using **horizontal/vertical containers**
- Add titles and spacing for clarity

Note: Dashboards allow multiple views to be analyzed together.

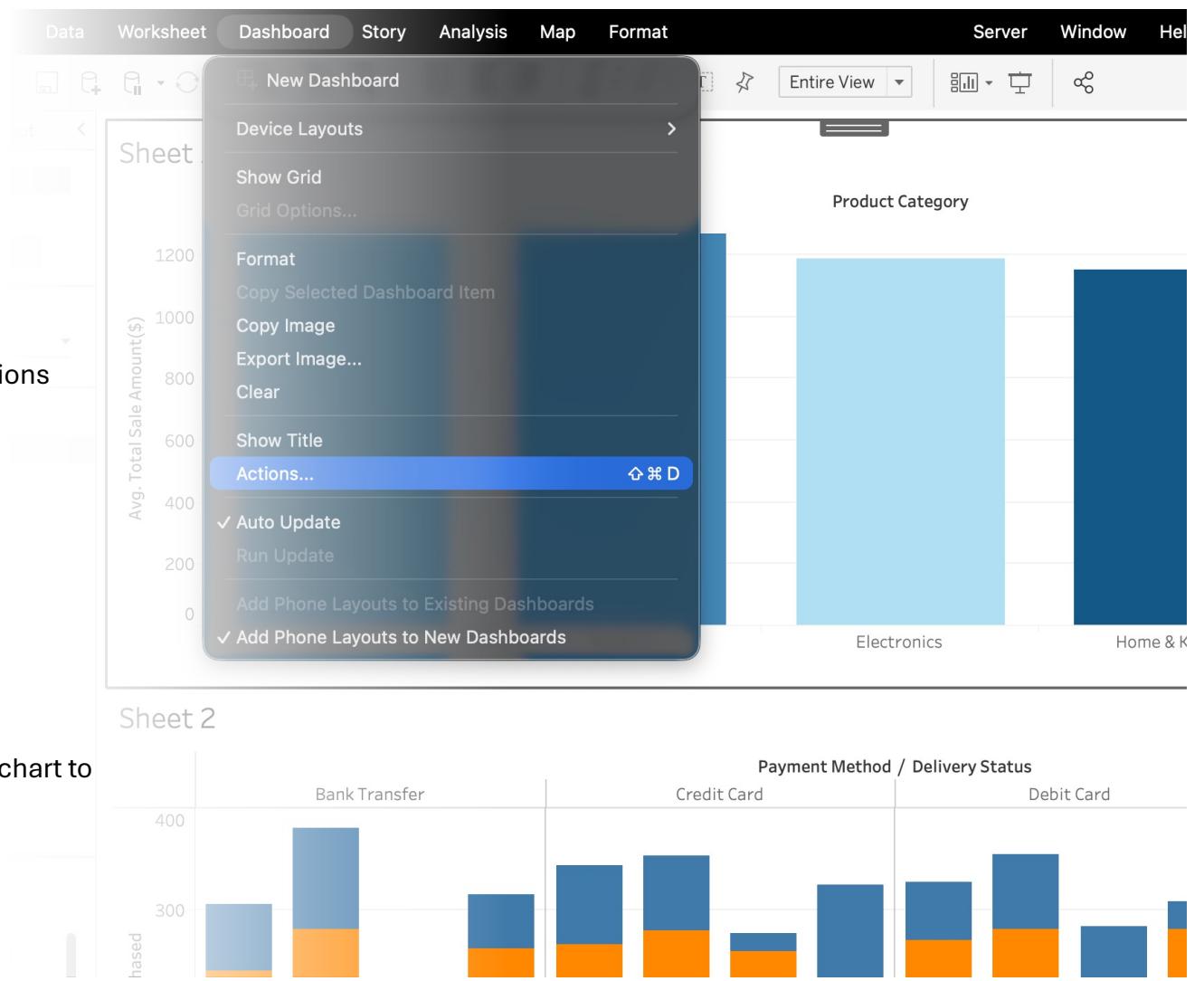


Step 6: Add Dashboard Actions

Add Interactivity with Dashboard Actions

- Click **Dashboard** → **Actions**
- Choose an action type:
 - a. Filter (most common)
 - b. Highlight
 - c. URL
- Select source and target sheets
- Test interactions by clicking chart elements

Tip: Filter actions let users click one chart to update others.





Step 7: Publish to Tableau Public

Publish and Share Your Dashboard

- Click **File → Save to Tableau Public**
- Sign in to your Tableau Public account
- Add a title and description
- Click **Save**
- Copy the public URL to share

Reminder: All Tableau Public dashboards are publicly visible.





Troubleshooting Common Issues

1

Data not loading: Check file format and field types

2

Chart looks incorrect: Verify dimensions vs. measures

3

Filters not working: Confirm action settings

4

Dashboard layout breaks: Use containers consistently

5

Slow performance: Reduce marks and filters

Glossary of Key Tableau Terms

Dimension – Categorical field (e.g., Category, Region)

Measure – Numeric field (e.g., Sales, Profit)

Worksheet – A single chart or visualization

Dashboard – A collection of worksheets

Filter – Limits data shown

Action – Adds interactivity between views



You're Ready
to Build
Interactive
Dashboards!

You learned how to:

- Connect data
- Build charts
- Create dashboards
- Add interactivity
- Publish your work
- Practice improves dashboard design
- Explore Tableau Public for inspiration



THANKS!!