

# Actions

**Actions:** These are the activities performed when we trigger an event.

**Actions Filter :** Target visual will be filtered with reference to source visual.

Tableau Public - Book3

File Data Worksheet Dashboard Story Analysis Map Format Window Help

Columns: Category  
Rows: SUM(Sales)

Filters: Source

Dimensions: Product Name, Region, Segment, Ship Date, Ship Mode, Ship Mode (group), Ship Status, State, State (group), Sub-Category, Measure Names

Measures: Days to Ship Actual, Days to Ship Scheduled, Discount, Profit, Profit per Order, Profit Ratio, Quantity, Sales, Sales Forecast, Sales per Customer

3 marks 1 row by 3 columns SUM(Sales): 2,297,354

**Edit Filter Action**

Name: Filter1

Source Sheets:

- ☒ Sample - Superstore (Sample-SuperstoreV1)
- ☐ Category Wise Sales
- ☐ CustomTerritories
- ☐ Highlighting
- ☐ MAPS
- ☒ Source
- ☐ Target

Run action on:

- 
- 
- 
- ☐ Run on single select only

Target Sheets:

- ☒ Target

Clearing the selection will:

- ☒ Leave the filter
- ☐ Show all values
- ☐ Exclude all values

Target Filters:

- ☐ Selected Fields
- ☒ All Fields

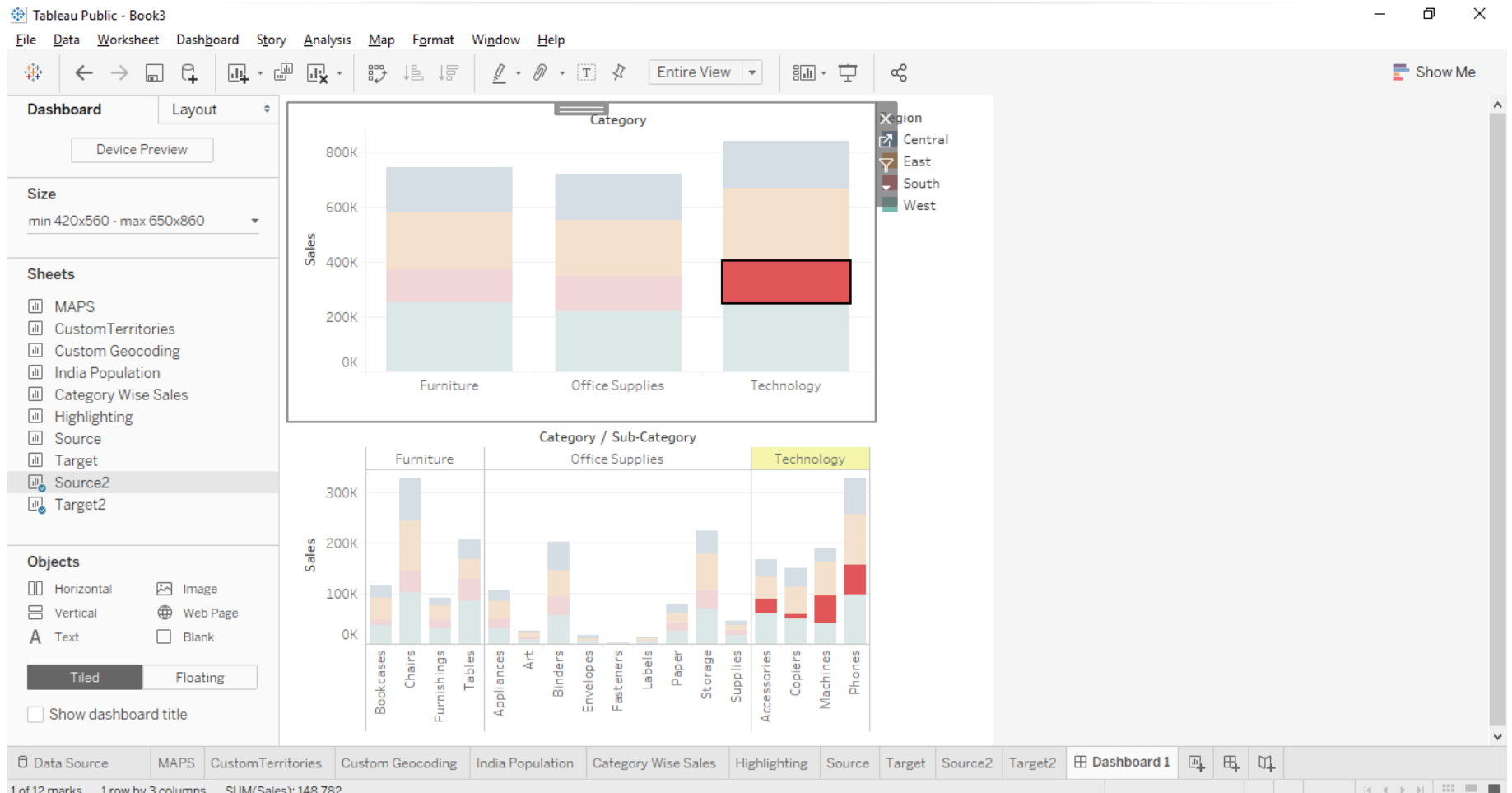
Source Field	Target Field	Target Data Source

Add Filter... Edit... Remove

OK Cancel

# Actions

**Actions Highlight:** Using this feature highlighting will be done with some event.



# Actions

**Actions URL:** This feature allows us to open a browser when some event occurs.

Tableau Public - Book3

File Data Worksheet Dashboard Story Analysis Map Format Window Help

Data Analytics

Orders (orders)

Search

Tables

- City
- Country
- Customer ID
- Customer Name
- Order Date
- Order ID
- Postal Code
- Product ID
- Product Name
- Region
- Row ID
- SC
- Segment
- Ship Date
- Ship Mode
- State
- State Set
- Sub-Category
- Measure Names
- AREA SALES

Parameters

- PSC

Columns: Longitude (generated)

Rows: Latitude (generated)

Sheet 3

Filters

Marks

- Automatic
- Colour
- Size
- Label
- Detail
- Tooltip
- SUM(Sales)
- SUM(Sales)
- State
- State
- State

Map showing US states with population data:

State	Population
Washington	138,641
Oregon	17,431
Idaho	4,382
Wyoming	1,603
Montana	5,589
North Dakota	920
South Dakota	1,316
Nebraska	7,465
Kansas	2,914
Oklahoma	19,683
Texas	170,188
New Mexico	4,784
Arizona	35,282
Utah	11,220
Colorado	32,108
California	457,688

© 2021 Mapbox © OpenStreetMap

Actions

Actions let you create interactive relationships between data, dashboard objects, other workbook sheets and the web.

Name	Run On	Source	Fields
Hyperlink1	Menu	Sheet 3	State

Edit URL Action

Name: Hyperlink1

Source Sheets

Sheet 3

Run action on:

- Hover
- Select
- Menu

URL

https://en.wikipedia.org/wiki/<State>

Test Link

https://en.wikipedia.org/wiki/<State>

☐ URL Encode Data Values

☐ Allow Multiple Values

Item Delimiter: ,

Delimiter Escape: \

URL Target

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

OK Cancel



# Actions

**Actions Parameter :** This feature allows us to dynamically set the value of the parameter.

- Create a parameter
- Create a Calculated field
- Assign action to assign the value to the parameter

The screenshot displays the Tableau interface with a horizontal bar chart titled 'ACTION PARAMETER'. The chart shows sales data categorized by 'Category' and 'SC'. The 'Columns' shelf contains 'SUM(Sales)' and the 'Rows' shelf contains 'Category' and 'SC'. The chart is filtered by 'Category' and 'SC'. The 'Marks' shelf is set to 'Automatic'. The 'Parameters' section on the left shows a parameter named 'PSC'.

Two dialog boxes are overlaid on the chart:

- Actions**: This dialog box lists the actions created. It shows a table with columns: Name, Run On, Source, and Fields. The table contains one entry: 'Parameter1' with 'Select' as the Run On action, 'ACTION PARAMETER' as the Source, and 'PSC' as the Fields.
- Edit Parameter Action**: This dialog box allows you to configure the action. It shows the 'Name' as 'Parameter1', the 'Source Sheets' as 'ACTION PARAMETER...', and the 'Run action on:' options as 'Hover', 'Select', and 'Menu'. The 'Target' section shows the 'Parameter' as 'PSC' and the 'Field' as 'None'.

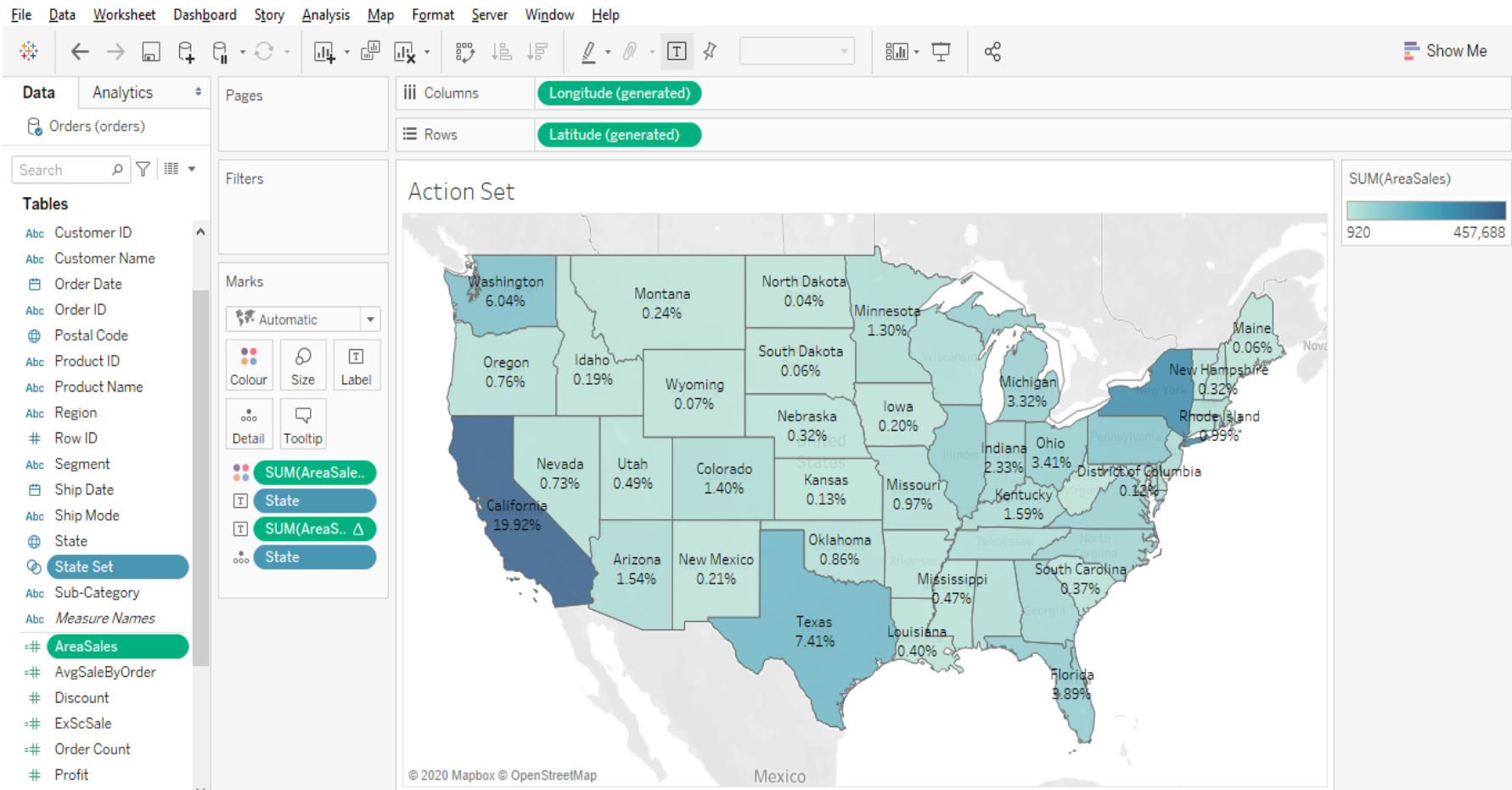
Category	SC	Sales
Technology	Phones	189,239
Technology	Machines	167,380
Technology	Accessories	149,528
Technology	Copiers	149,528
Furniture		742,000
Office Supplies		9,047



# Actions

**Actions Set:** This feature allows us to dynamically pass the values to the set.

- Create a Set
- Create a Calculated field
- Assign action to set



# ASSIGNMENT



- Using India Map Represent state wise percentage of Covid cases.
- In the another sheet create a bar chart to represent state wise Total Covid Cases, Recovered & Deaths.
- Use action so that the bar graph representation of Covid details should be displayed for the highlighted state.
- In sheet 1 represent Category & Region wise profit, category should be bifurcated on the basis of region.
- In sheet 2 represent Category , Subcategory & Region wise profit.
- Implement an Action on sheet 1 so that sheet 2 which is filtered on region & subcategory for the selected region in sheet 1.
- Create a US Map to display the %age sales contribution of each state. Implement an set action to give the sales comparison of the selected area.
- Represent segment wise profit using a barchart, Implement a action Parameter so that it can be drill down to region.



# LOD Calculations

Level of detail expression allows us to compute aggregation that are not on level detail of the visualization

FIXED – Include the expression immaterial of it being included in the visualization is not included in the view

The screenshot shows the Tableau Desktop interface. The 'Columns' shelf contains 'Measure Names' and the 'Rows' shelf contains 'Category' and 'Sub-Category'. The 'Marks' card is set to 'Automatic'. The 'Filters' shelf contains 'Measure Names'. The 'Measure Values' shelf contains 'SUM(FIXEDCATSALES)' and 'SUM(Sales)'. A dialog box is open over the table, showing the calculation `{FIXED [Category] : SUM([Sales])}`. The dialog box also indicates 'The calculation is valid.' and '1 Dependency'.

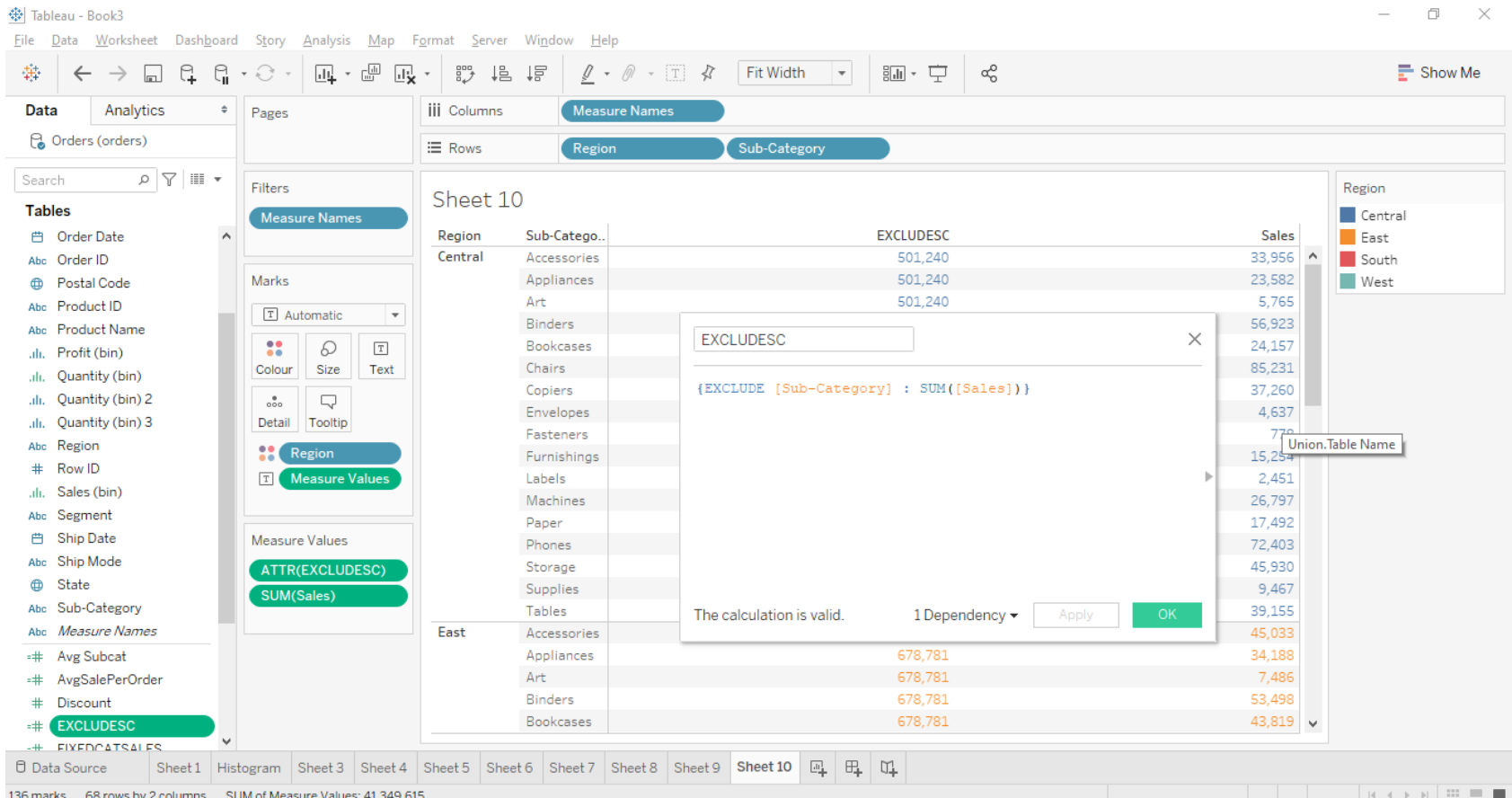
Category	Sub-Category	FIXEDCATSALES	Sales
Furniture	Bookcases	742,000	114,880
	Chairs	742,000	328,449
	Furnishings		91,705
	Tables		206,966
Office Supplies	Appliances		107,532
	Art		27,119
	Binders		203,413
	Envelopes		16,476
	Fasteners		3,024
	Labels		12,486
	Paper		78,479
	Storage		223,844
	Supplies		46,674
	Technology	Accessories	
Copiers		836,154	149,528
Machines		836,154	189,239
Phones		836,154	330,007



# LOD Calculations

Level of detail expression allows us to compute aggregation that are not on level detail of the visualization

EXCLUDE – exclude the expression even if it is included in the view

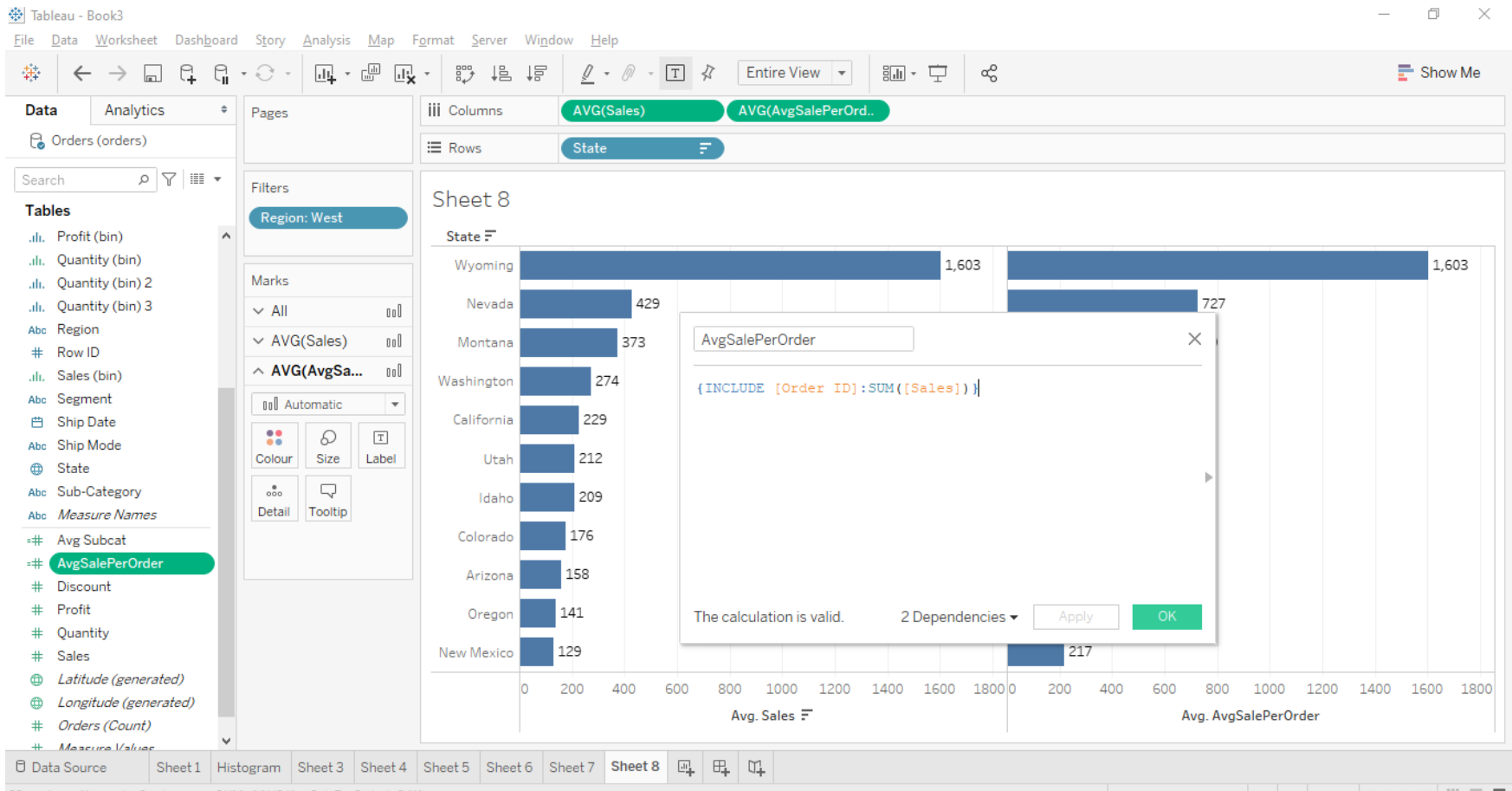




# LOD Calculations

Level of detail expression allows us to compute aggregation that are not on level detail of the visualization

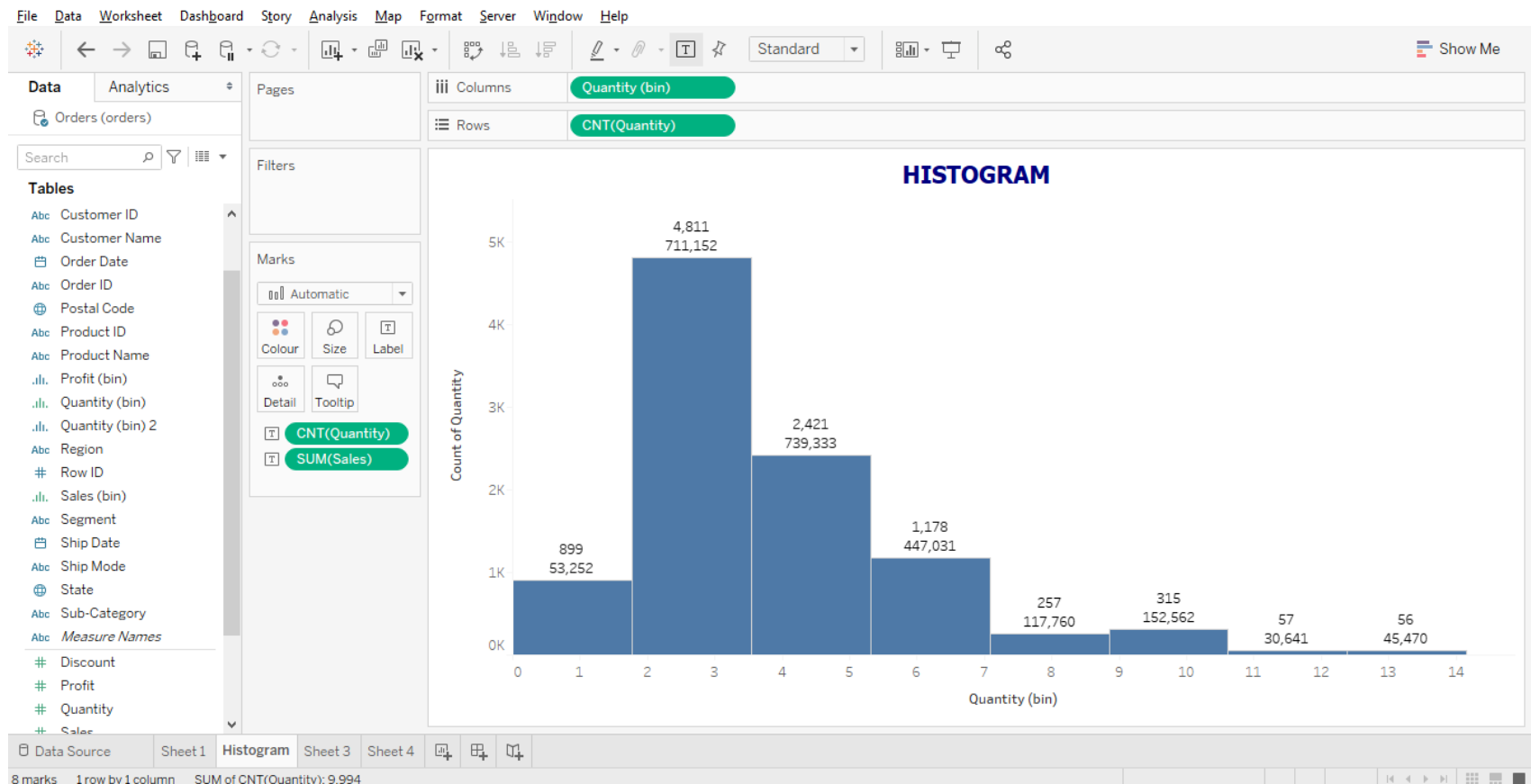
**INCLUDE** – Include the expression even if it is not included in the view



# Histogram

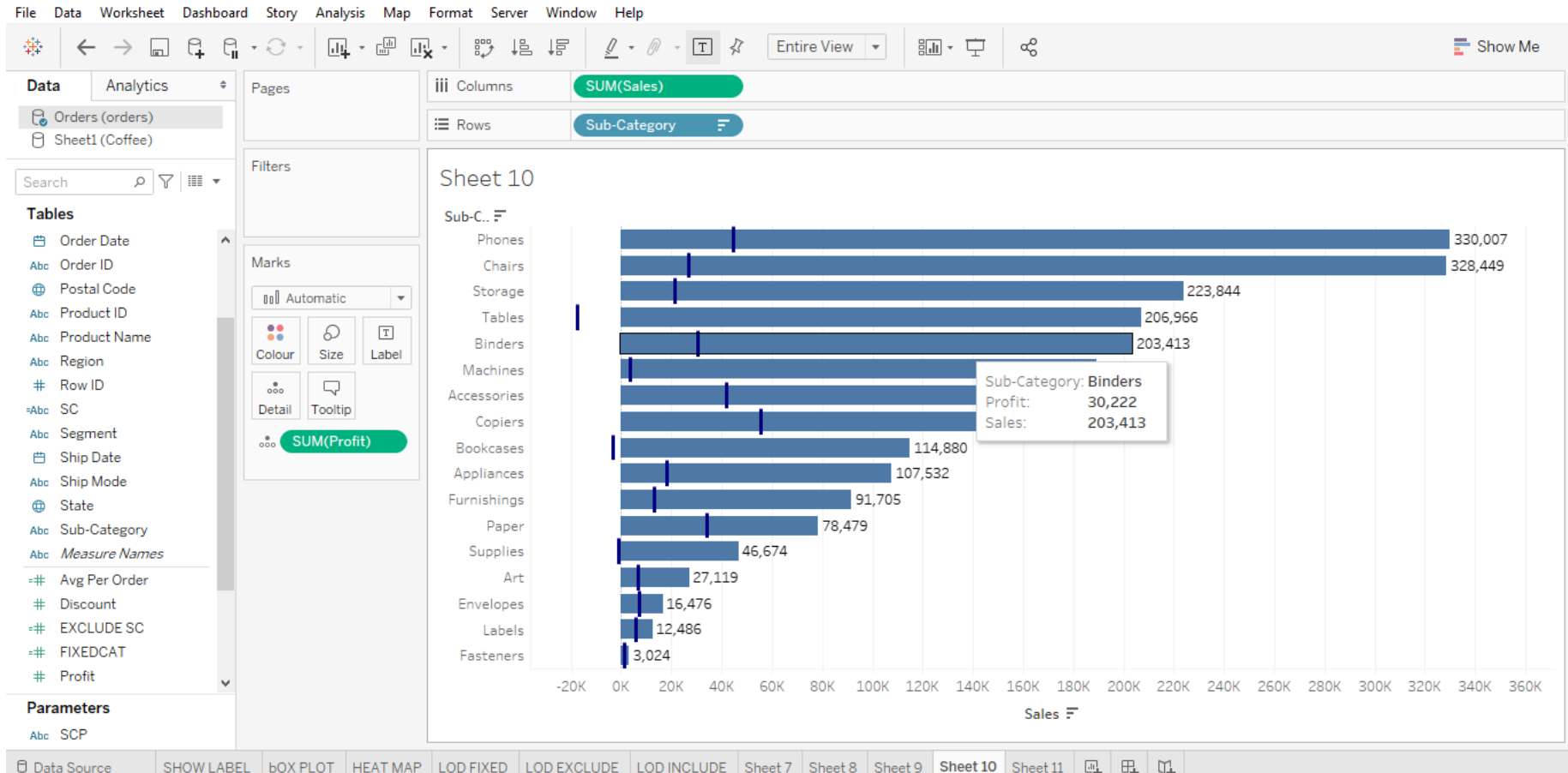
Histogram is same like bar chart however, it groups the values into range. Each bar in histogram represents the number of values present in that range.

Tableau creates a histogram by taking one measure. It creates an additional bin field for the measure used in creating a histogram.



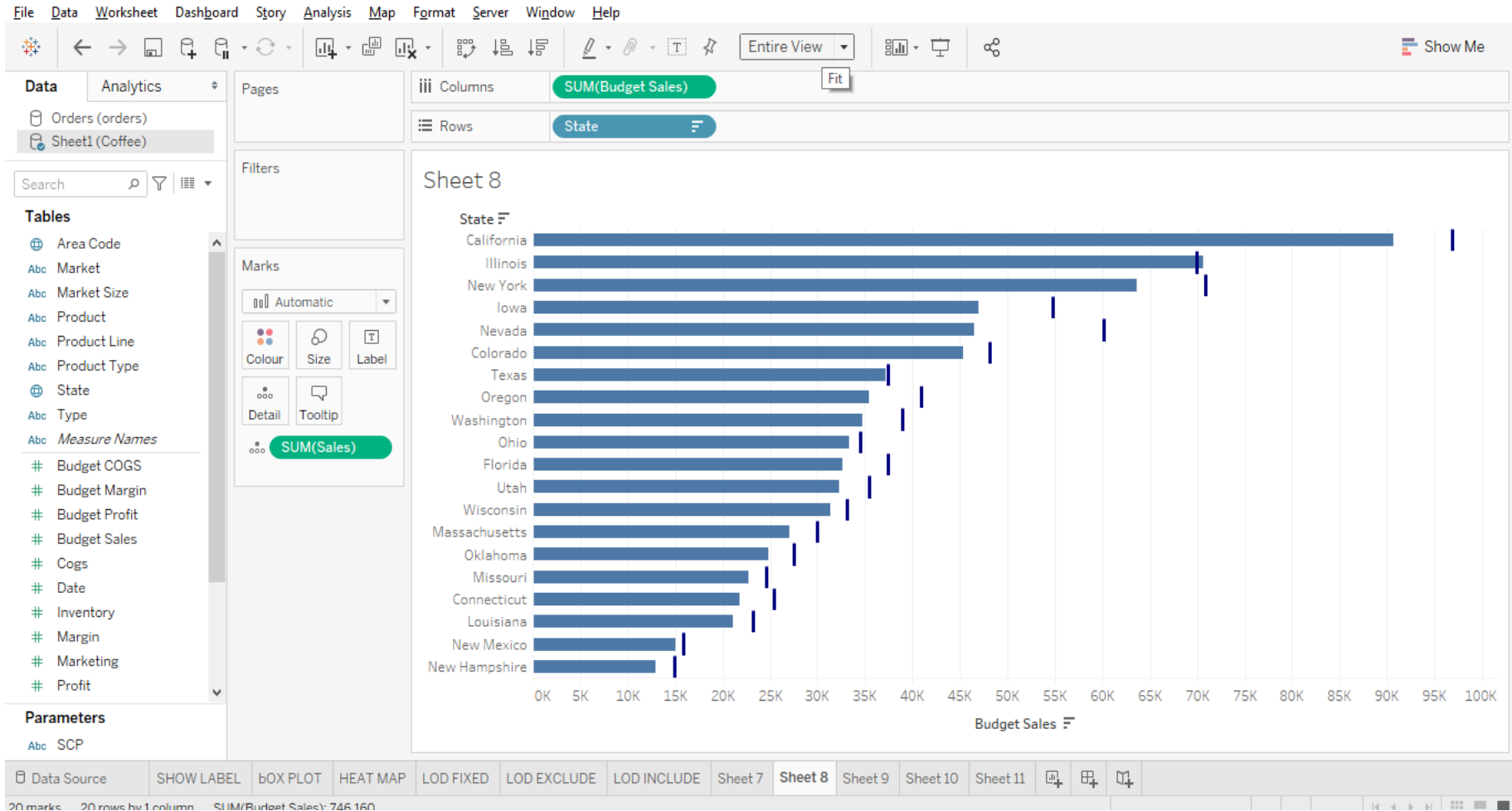
# Bullet Chart

Bullet Chart is a variation of Bar graph, used to compare value of one measure with another measure in the context of finding the variation in the first measure within a range of variations in the second measure.



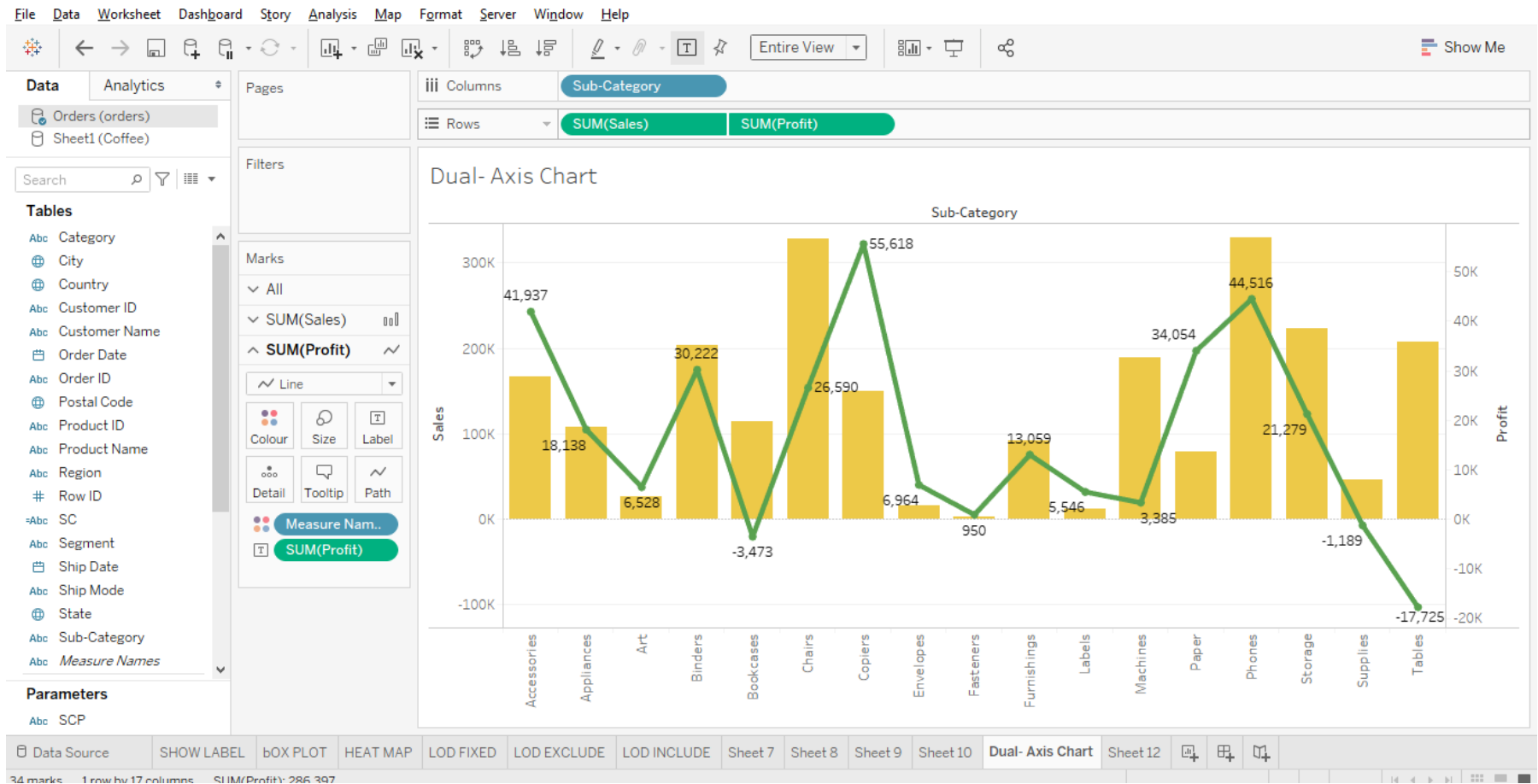
# Bullet Chart

Comparison of Sales target and Actual sales (Coffee Data Source)



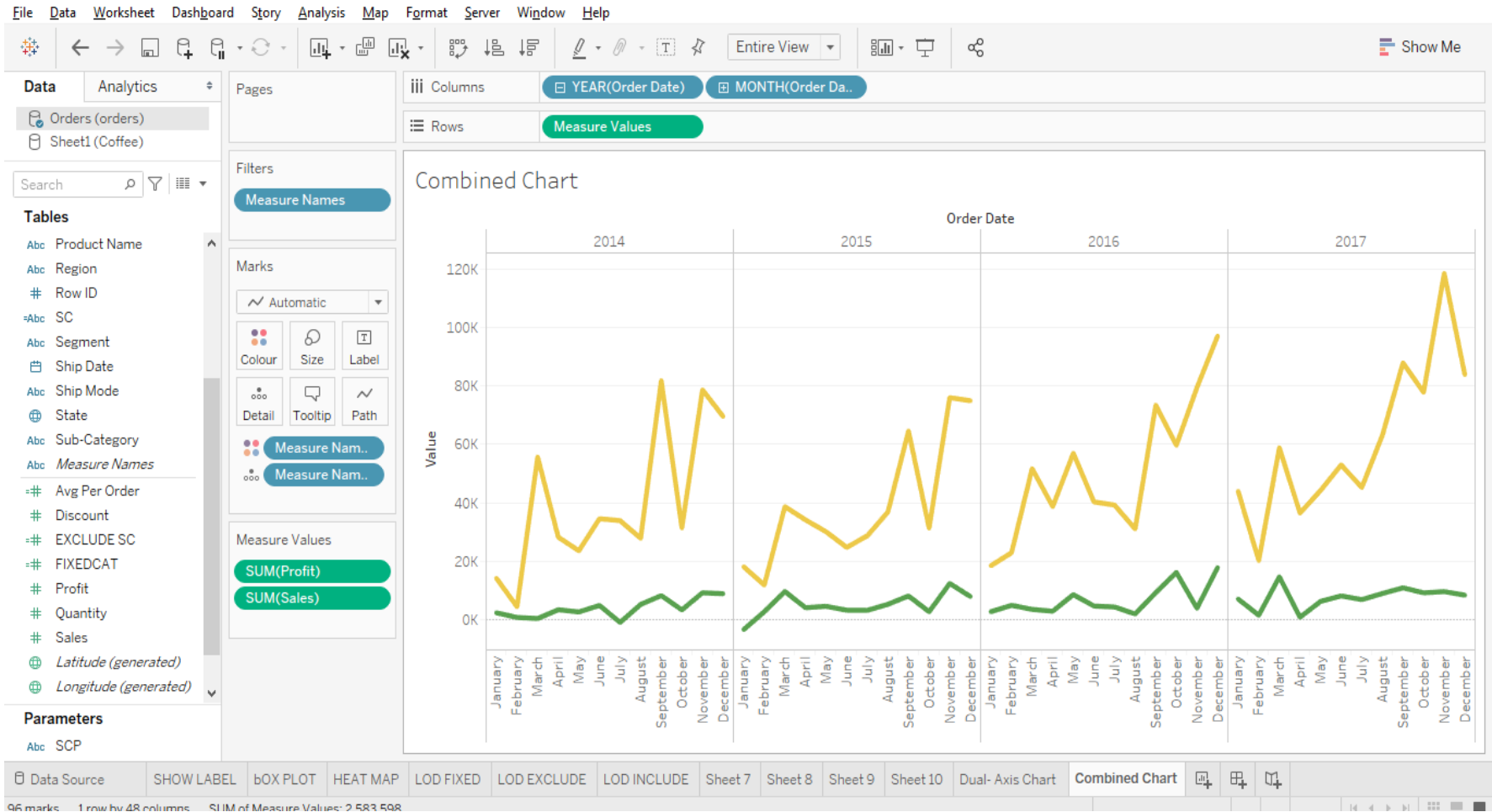
# Dual- Axis Chart

In Dual Axis chart we have two Y – Axis. These are helpful when we want to see the relationship between two or more variables in a limited space and in one view.



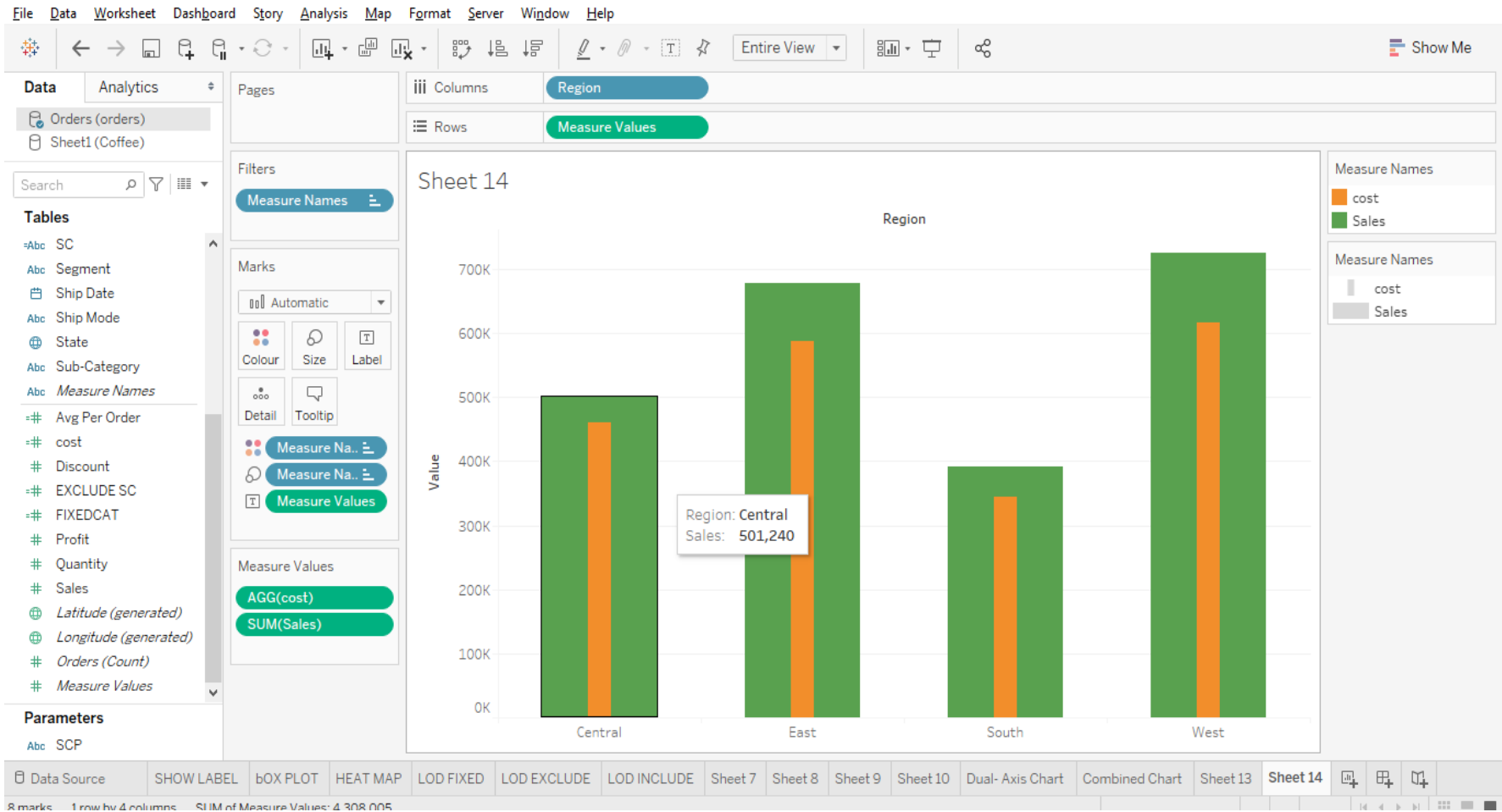
# Combined Chart

In Combined Chart two or more measures are plotted on same Y-Axis



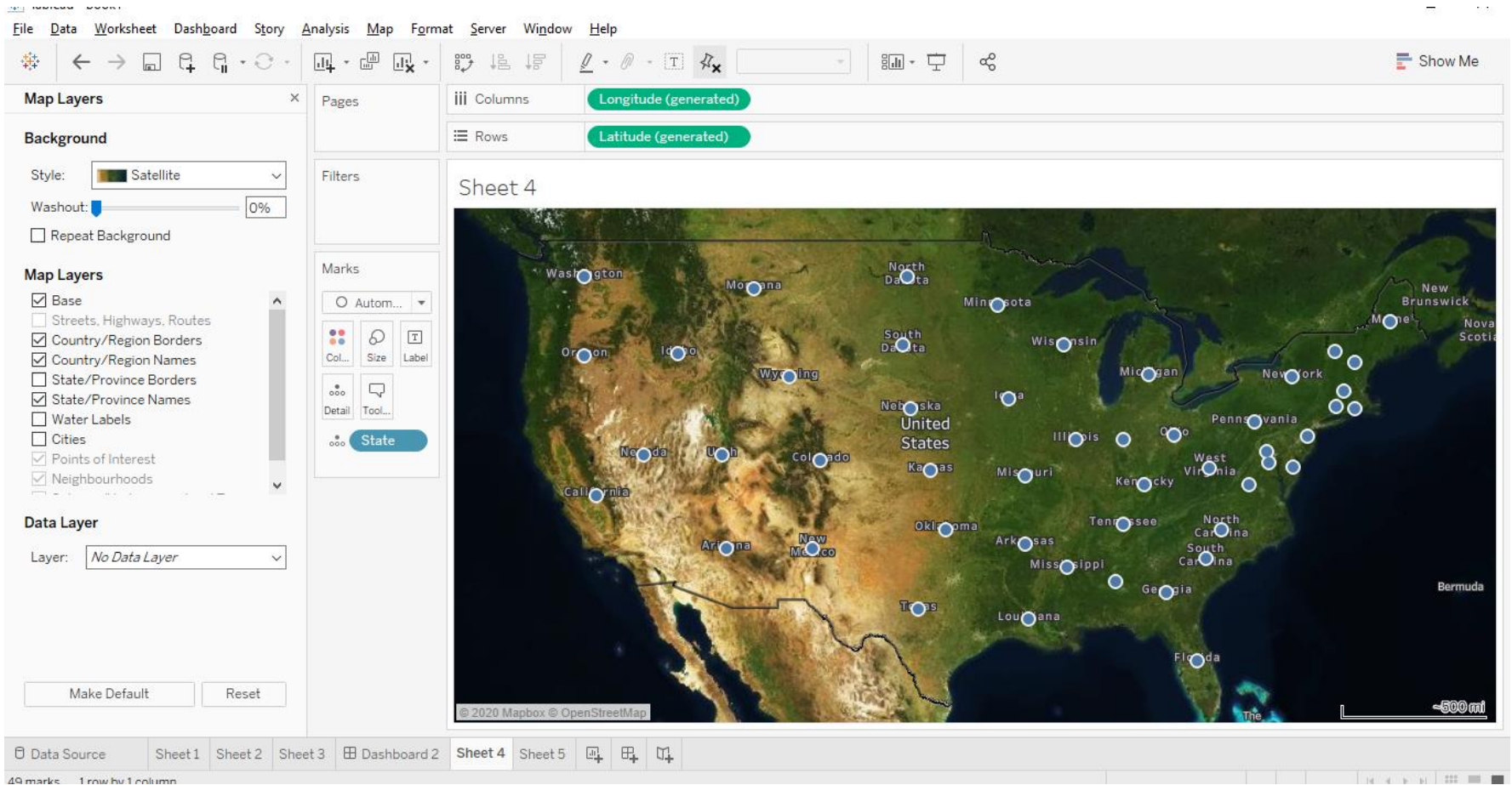
# Bars in Bar Chart

Bar in Bar chart is used when we need to plot two measures in the same bar. These are useful for comparing the two measures.



# Map Layers

Map layers are used to give other layers (layout) or background to Map like coast lines or Satellite





# Map Layers – Back Ground Image

Back Ground Image can be used to create a custom map in Tableau

The screenshot displays the Tableau software interface. The top menu bar includes File, Data, Worksheet, Dashboard, Story, Analysis, Map, Format, Server, Window, and Help. The left sidebar shows the Data pane with 'Car (bodylocation)' and 'Orders (orders)' tables. The 'Tables' section lists 'Part' and 'Measure Names'. The 'Marks' card is set to 'Part'. The main view area, labeled 'Sheet 5', shows a brown Ford EcoSport car with various parts labeled: ROOF, Side MIRROR, DOOR, ALLOY WHEELS, HEAD LAMP, FOG LAMP, BONNET, GRILL, ECOSPORT, and BUMPER. The bottom status bar shows 'Data Source' and a tab for 'Sheet 5'.

