14.2.2 Introduction to Tableau Worksheets

In order for your visualizations to have graphs or plots, you will need to create worksheets. As you've already learned, worksheets are the foundation of everything we'll be creating in Tableau. Take some time now to get more familiar with Tableau worksheets.

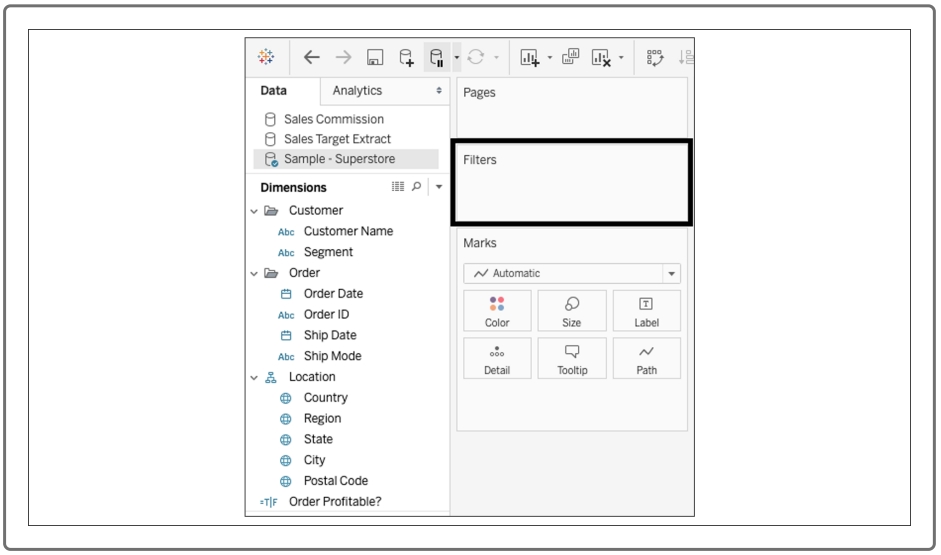
As with most parts of Tableau, you will need to start with creating a worksheet. Once you have a worksheet complete, you can add it to a dashboard or story. Let's walk through the basics that you'll need to get started with Tableau worksheets.

Drag and Drop

In Tableau, you'll need to drag and drop the measures or dimensions into the worksheet. While you may have needed to write code in other analytic platforms, this is not required in Tableau. You simply just drag the data you want into the workspace, and then make sure it's represented correctly.

Filters

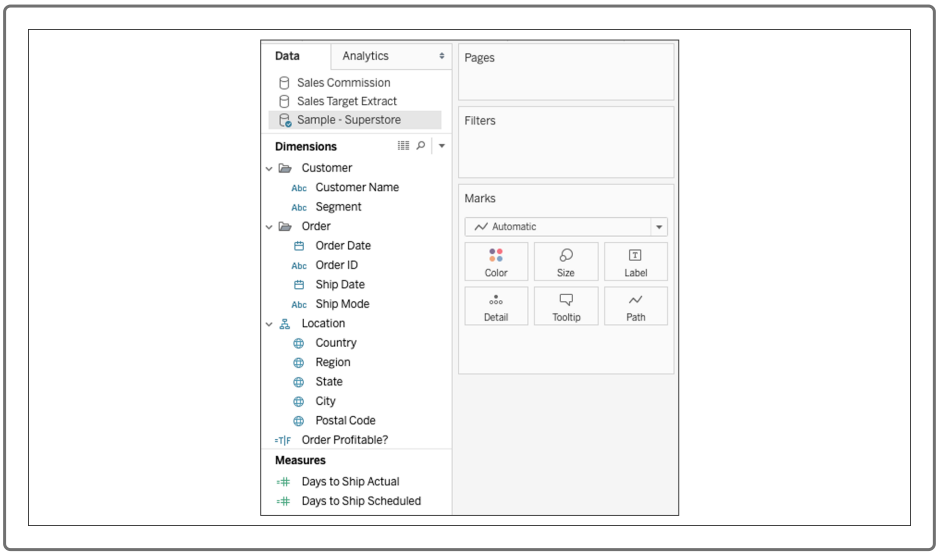
There are many ways to filter your data in Tableau. The following image shows the section for Tableau filters. To filter by a specific dimension, measure, or data field, you can drag it to the filters section. There are other ways to filter as well, but we'll discuss those later on.



Marks

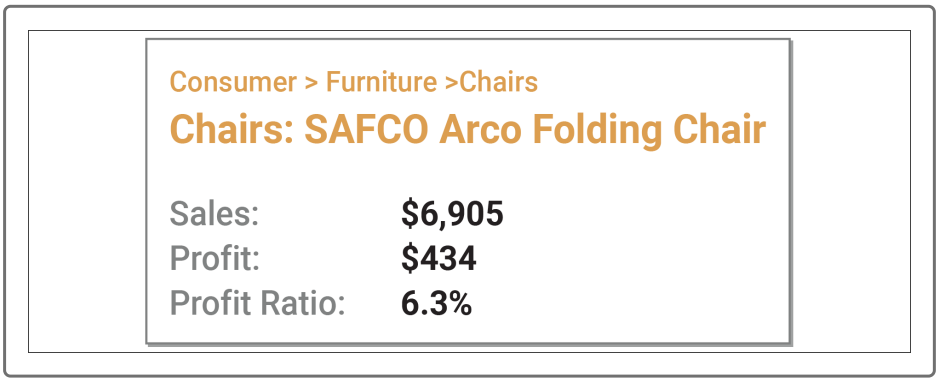
Marks in Tableau are essentially how you format your graph or plot. You can change several aspects of any graph you create, including the color, size, text, detail, and tooltip. Be sure to explore each of these options, as they can greatly improve the quality of your worksheets.

Here's what the Marks section looks like. Note that you can drag dimensions from the left to the Marks section.

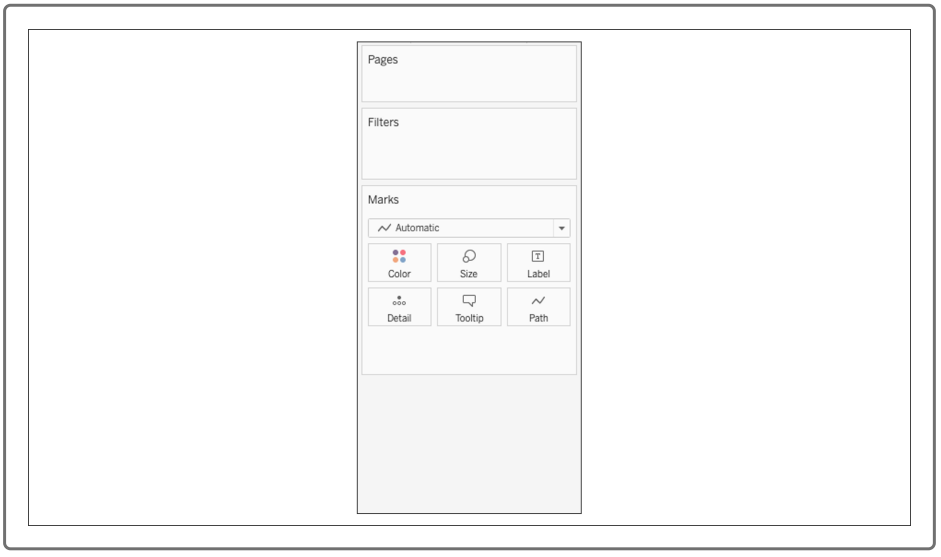


Tooltip

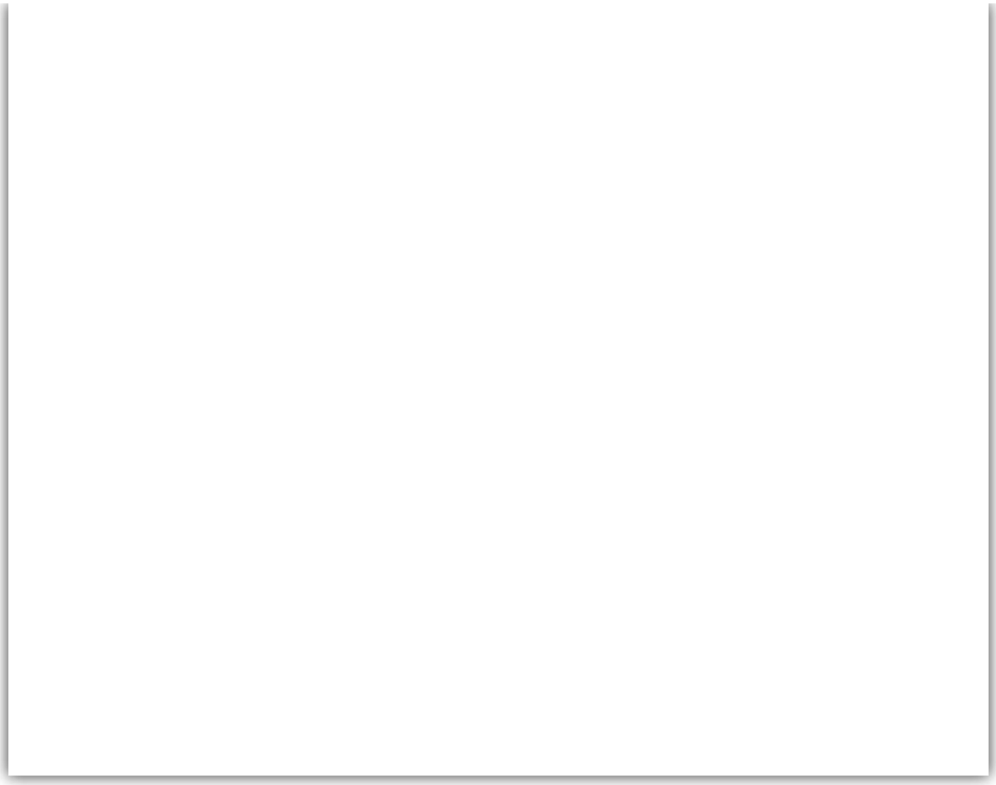
Another useful tool in Tableau are tooltips, which appear as a popup window when you place your cursor over specific pieces of data. Tableau often creates tooltips automatically for you, but you can also create and customize your own. The following is an example of a tooltip.



You can change most of the fonts and styles for the tooltip as well as add data. To edit the tooltip, go to the worksheet you are viewing and then click the tooltip icon in the Marks section, as shown in the following image.



When you click the icon, you'll see a screen where you can edit the contents of a specific tooltip.



Measures

Earlier we learned that Tableau has measures and dimensions. Within measures, there are discrete measures and continuous measures.

Discrete measures are treated as finite values, since there is a countable amount of a given measure. The discrete measures, which are labeled in blue, add headers to the worksheet. An example of a discrete measure is the total number of rides.

Continuous measures are essentially measures that are infinite and add axes to the worksheet. Continuous measures are labeled in green. Time is one example of a continuous measure, since there is no defined end.

Sheet Tabs

Worksheets, dashboards, and stories will show up as tabs at the bottom of your Tableau workspace. You can switch between these tabs as you would in a web browser, which allows you to more easily manage multiple worksheets, dashboards, and stories much easier.

The three tabs are denoted by icons, as shown in the following image. The first icon with the "+" (plus sign) and an image that looks like a graph is the

worksheet tab. The middle icon, with a grid and a plus sign, is for dashboards. The last icon that resembles a book along with a plus sign, is for stories.

Renaming Worksheets

At times you will need to rename the worksheets to accurately describe your project. To do this, you have two choices. First, you can double-click on the tab and then edit the name of the tab. The second option is to right-click on the tab and then change the name. You can choose either method—there is no right or wrong way.

When naming worksheets, dashboards, and stories, choose a name that accurately represents the data in the tab. Also, since tabs are fairly small, you should choose a name that is concise.