MODULE 4

INTERACTION IN TABLEAU

Interactions in Tableau are crucial for creating dynamic and user-friendly dashboards. They enhance the user experience by allowing deeper data exploration and making dashboards more interactive. Here’s a more detailed look at different types of interactions you can implement in Tableau:

1. **Filters**
   * **Filter Actions**: These allow users to filter the data in one visualization by selecting marks or data points in another visualization. To set up a filter action:
2. Go to **Dashboard** > **Actions**.
3. Add a new action and select **Filter**.
4. Configure the source and target sheets, and specify how the filter should behave.
   * **Quick Filters**: These provide user-friendly controls like dropdowns, checkboxes, and sliders to filter data. You can add a quick filter by right-clicking a field on the shelf and selecting **Show Filter**.
5. **Highlight Actions**
   * Highlight actions enable users to highlight related data across multiple visualizations by selecting data points in one visualization. To create a highlight action:
6. Go to **Dashboard** > **Actions**.
7. Add a new action and select **Highlight**.
8. Configure the source and target sheets, and specify the fields to highlight.
9. **URL Actions**
   * URL actions allow users to open a webpage or another Tableau dashboard by clicking on a mark or text. To set up a URL action:
10. Go to **Dashboard** > **Actions**.
11. Add a new action and select **URL**.
12. Configure the source sheet, the field to use, and the URL to open.
13. **Parameter Actions**
    * Parameter actions let users change the value of a parameter by interacting with a visualization. This can be used to update calculations or visualizations dynamically. To create a parameter action:
    1. Go to **Dashboard** > **Actions**.
    2. Add a new action and select **Change Parameter**.
    3. Configure the source sheet, the parameter to update, and the field to use.
14. **Tooltip Actions**
    * Tooltip actions add interactivity to tooltips, such as showing additional visualizations or information when hovering over data points. You can set this up by editing the tooltip of a visualization and inserting a visualization or additional data fields.
15. **Set Actions**
    * Set actions enable users to dynamically change the members of a set based on their interactions. To create a set action:
    1. Go to **Dashboard** > **Actions**.
    2. Add a new action and select **Change Set Values**.
    3. Configure the source sheet, the set to update, and the behavior.
16. **Drill Down and Drill Up**
    * Drill down and drill up allow users to navigate through different levels of data granularity within a hierarchy. You can enable this by creating hierarchies in your data source and setting up your visualizations to use these hierarchies.
17. **Cross-Highlighting**
    * Cross-highlighting highlights related data points in other visualizations when data points are selected in one visualization. This happens automatically when using related fields across multiple visualizations.
18. **Legends**
    * Interactive legends allow users to highlight or filter data points based on the color, size, or shape legends. You can customize the legend behavior by right-clicking on the legend and selecting the desired options.
19. **Story Points**
    * Story points create an interactive, narrative presentation by linking multiple dashboards and visualizations together. To create a story:
    1. Go to **New Story** from the **File** menu.
    2. Add sheets or dashboards to the story points.
    3. Customize the captions and navigation.
20. **Custom Buttons**
    * Custom buttons can be added to dashboards to perform specific actions like navigating between dashboards, resetting filters, or triggering other actions. You can create buttons using shapes or images and adding URL or filter actions to them.

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**Text Tooltips**

* 1. **Basic Text Tooltips**:
     + **Edit Tooltip**: You can add or modify text tooltips by editing the tooltip for a specific sheet.

1. Click on the sheet you want to edit.
2. Go to the **Tooltip** button on the Marks card.
3. In the Edit Tooltip dialog box, you can add dynamic fields, plain text, and even basic HTML for formatting.
4. **Dynamic Text**:
   * You can include dynamic text that changes based on the data point being hovered over. Use the Insert dropdown in the Edit Tooltip dialog to add dynamic fields like SUM([Sales]), [Category], etc.
5. **Formatting Tooltips**:
   * Customize the font, size, color, and alignment of the text within the tooltip. You can use HTML tags for more advanced formatting if needed.

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**Visual Tooltips**

1. **Viz in Tooltip**:
   * **Add Visualization to Tooltip**: You can embed another visualization within a tooltip, allowing users to see related data when they hover over a mark.
2. Create the visualization you want to embed in the tooltip.
3. Go to the sheet where you want to add the tooltip visualization.
4. Click on the **Tooltip** button on the Marks card.
5. Click the Insert dropdown, and choose **Viz in Tooltip**.
6. Select the sheet you want to embed and configure the size and filters.

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