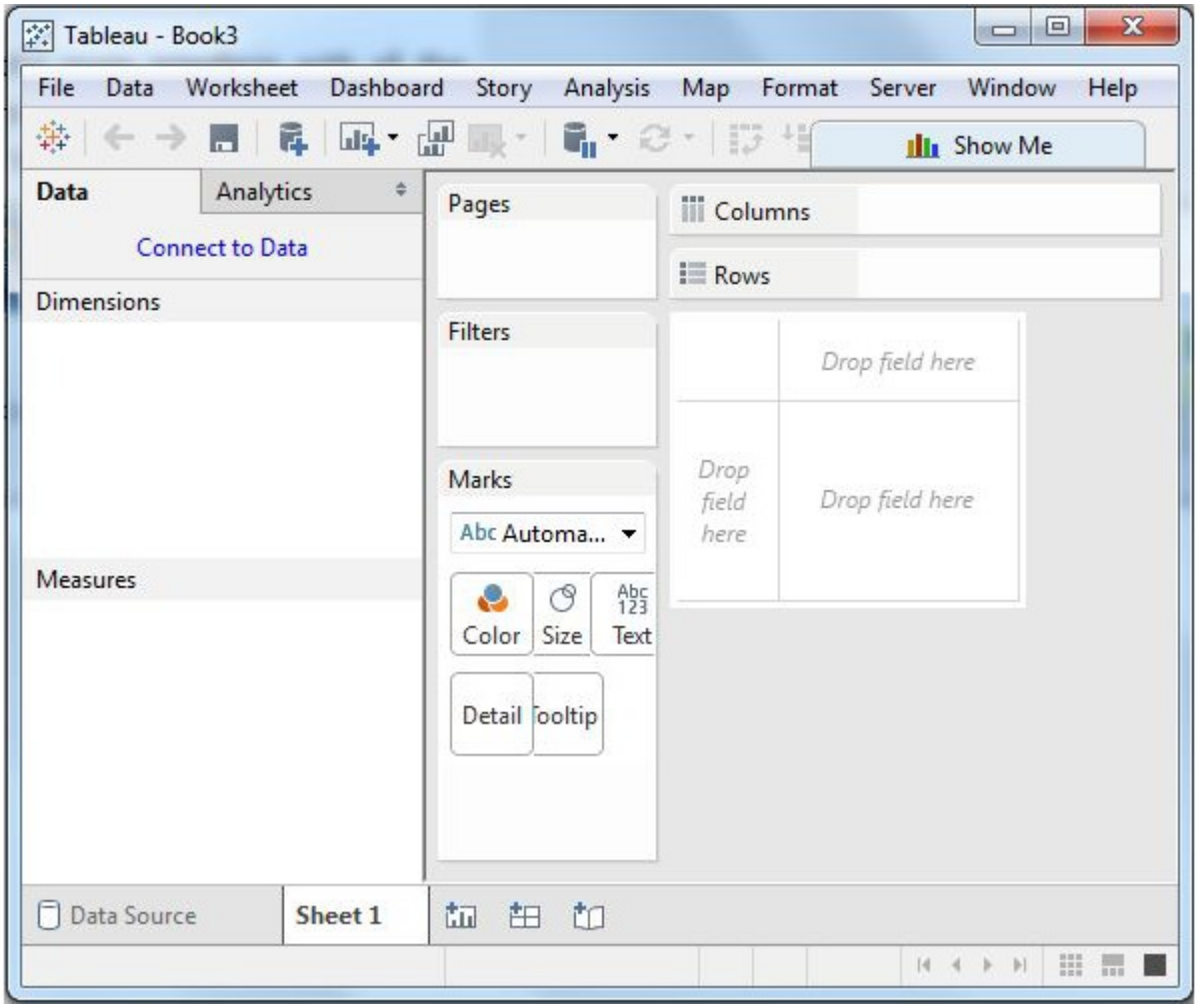
# Tableau - Navigation

In this chapter, you will get acquainted with various navigational features available in Tableau interface. On running Tableau desktop, you get the menu at the top which shows all the commands we can navigate. Let's open a blank workbook and go through the various important features under each menu.

## Menu Commands

On closing the getting started window, you get the main interface with all the available Menu commands. They represent the entire set of features available in Tableau. Various sections of the menu are shown in the following diagram. Next, you can see some details of each menu.

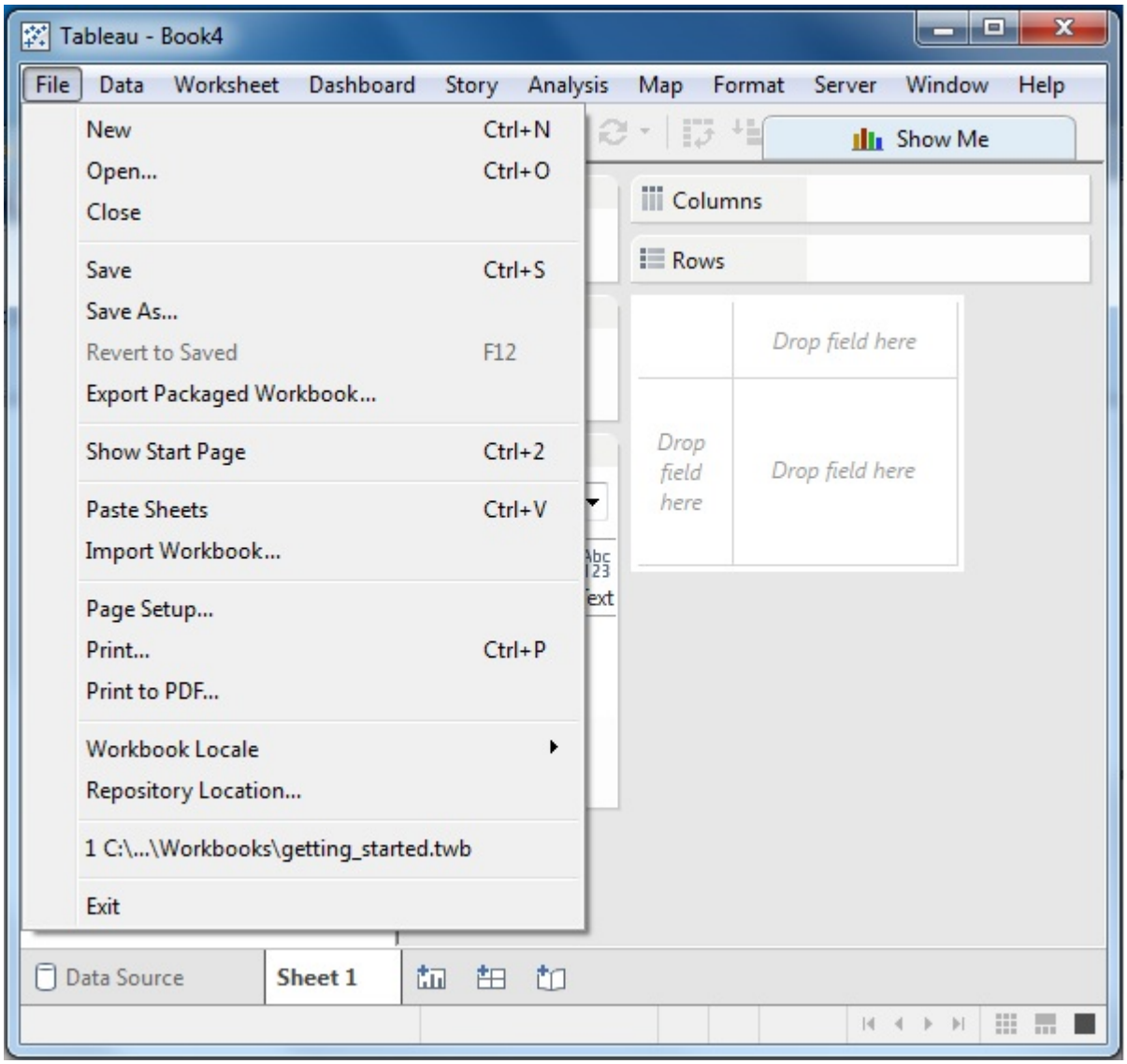



## File Menu

This menu is used to create a new Tableau workbook and open existing workbooks from both the local system and Tableau server. The important features in this menu are −

- **Workbook Locale** sets the language to be used in the report.

- **Paste Sheets** pastes a sheet into the current workbook, which is copied from another workbook.
- **Export Packaged Workbook** option is used to create a packaged workbook, which will be shared with other users.

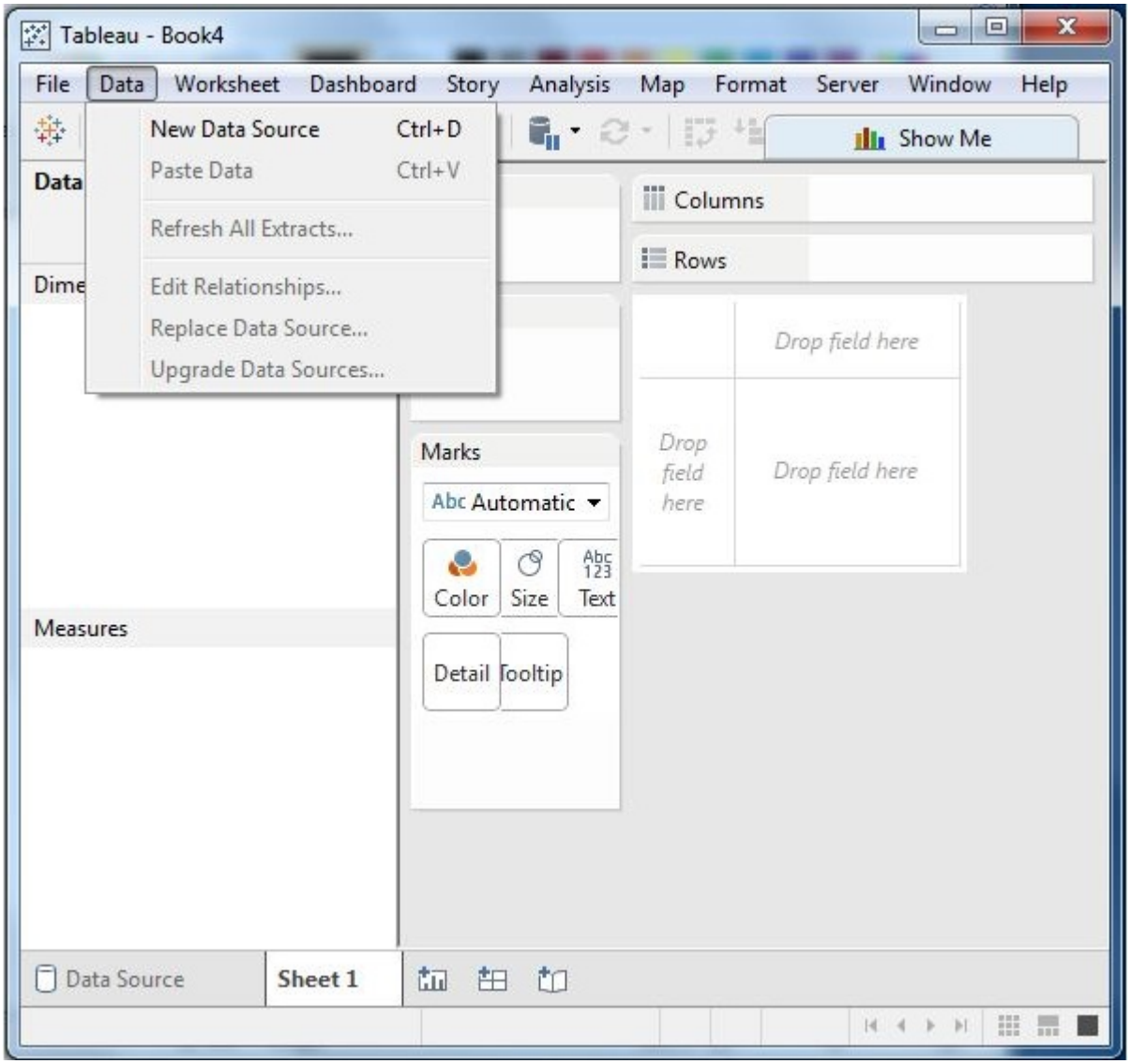



## Data Menu

This menu is used to create new data source to fetch the data for analysis and visualization. It also allows you to replace or upgrade the existing data source.

The important features in this menu are as follows −

- **New Data Source** allows to view all the types of connections available and choose from it.
- **Refresh All Extracts** refreshes the data from the source.
- **Edit Relationships** option defines the fields in more than one data source for linking.

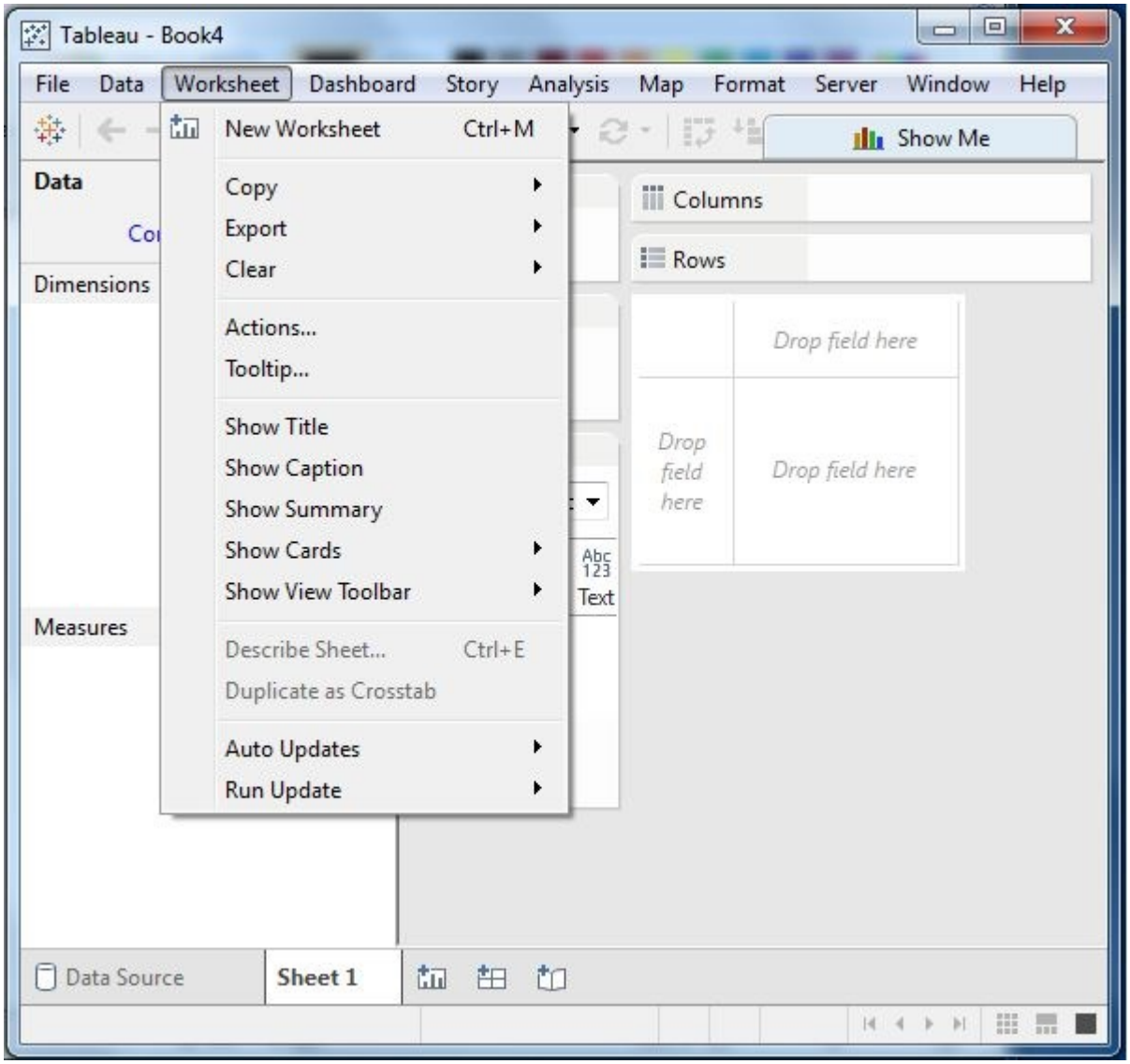



## Worksheet Menu

This menu is used to create a new worksheet along with various display features such as showing the title and captions, etc.

The important features in this menu are as follows −

- **Show Summary** allows to view the summary of the data used in the worksheet such as, count, etc.
- Tooltip shows the tooltip when hovering above various data fields.
- **Run Update** option updates the worksheet data or filters used.

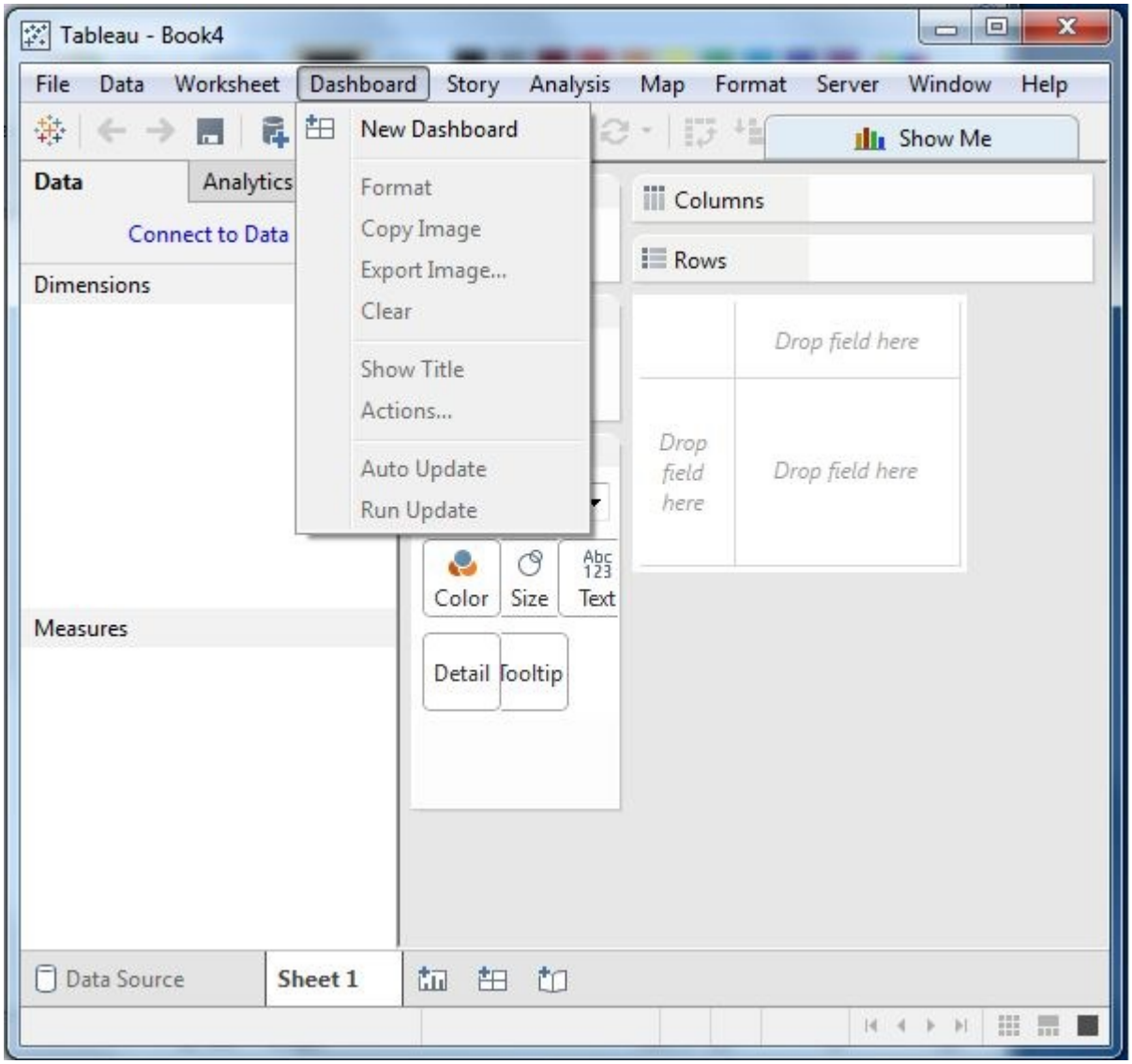



## Dashboard Menu

This menu is used to create a new dashboard along with various display features, such as showing the title and exporting the image, etc.

The important features in this menu are as follows −

- **Format** sets the layout in terms of colors and sections of the dashboard.
- **Actions** link the dashboard sheets to external URLs or other sheets.
- **Export Image** option exports an image of the Dashboard.

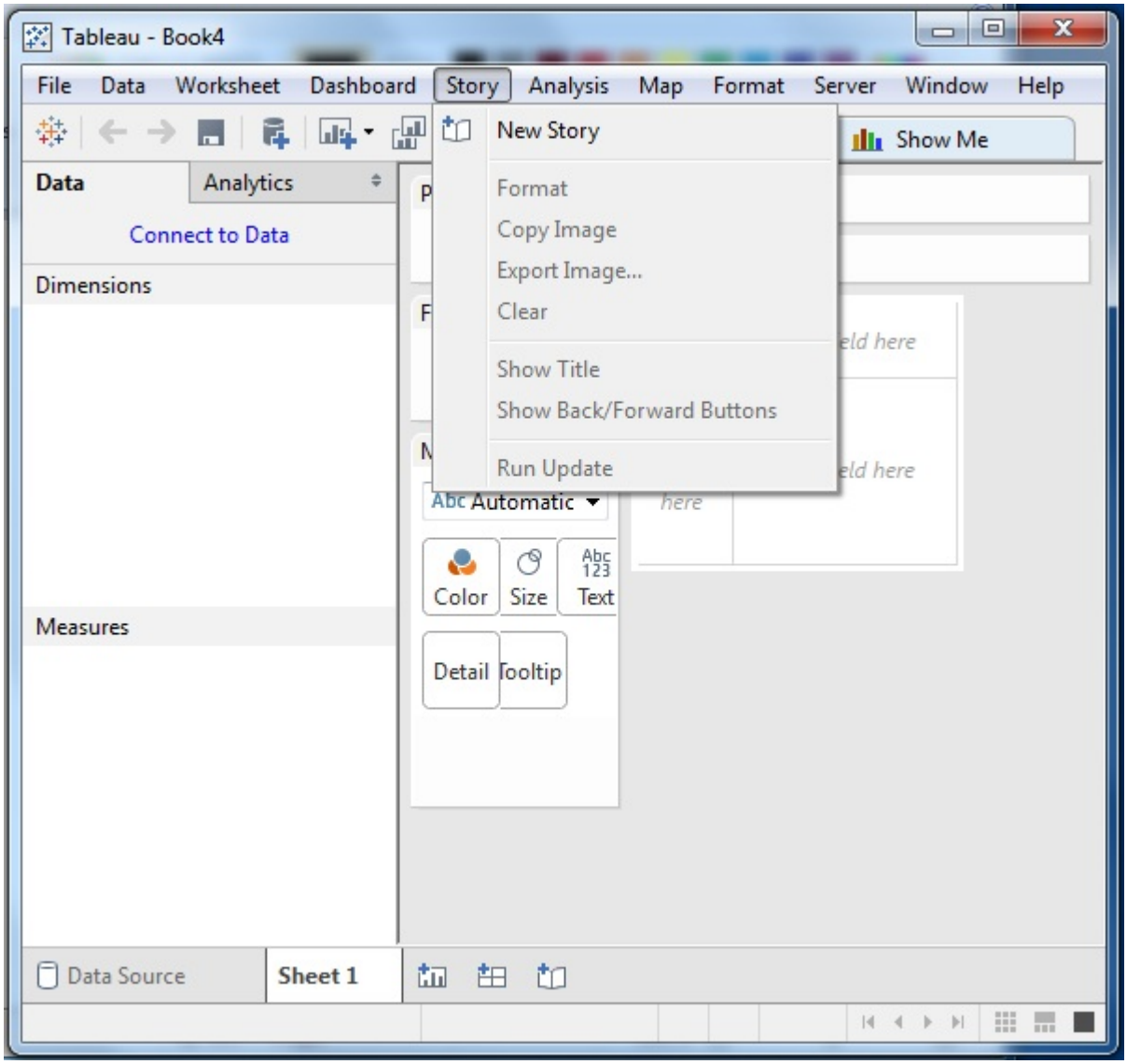



## Story Menu

This menu is used to create a new story which has many sheets or dashboards with related data.

The important features in this menu are as follows −

- **Format** sets the layout in terms of colors and sections of the story.
- **Run Update** updates the story with the latest data from the source.
- **Export Image** option exports an image of the story.

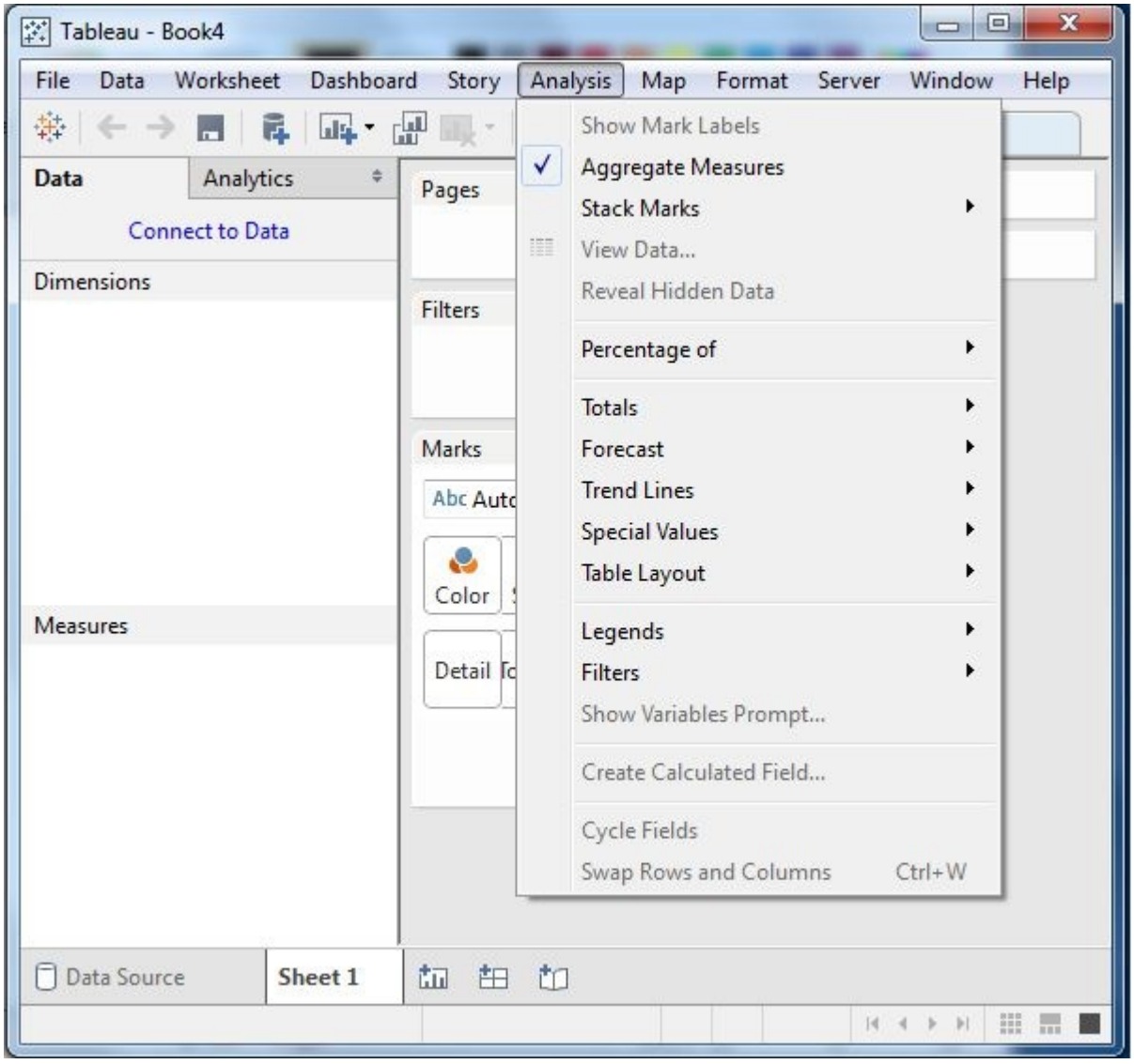



## Analysis Menu

This menu is used for analyzing the data present in the sheet. Tableau provides many outof-the-box features, such as calculating the percentage and performing a forecast, etc.

The important features in this menu are as follows −

- **Forecast** shows a forecast based on available data.
- **Trend Lines** shows the trend line for a series of data.
- **Create Calculated Field** option creates additional fields based on certain calculation on the existing fields.

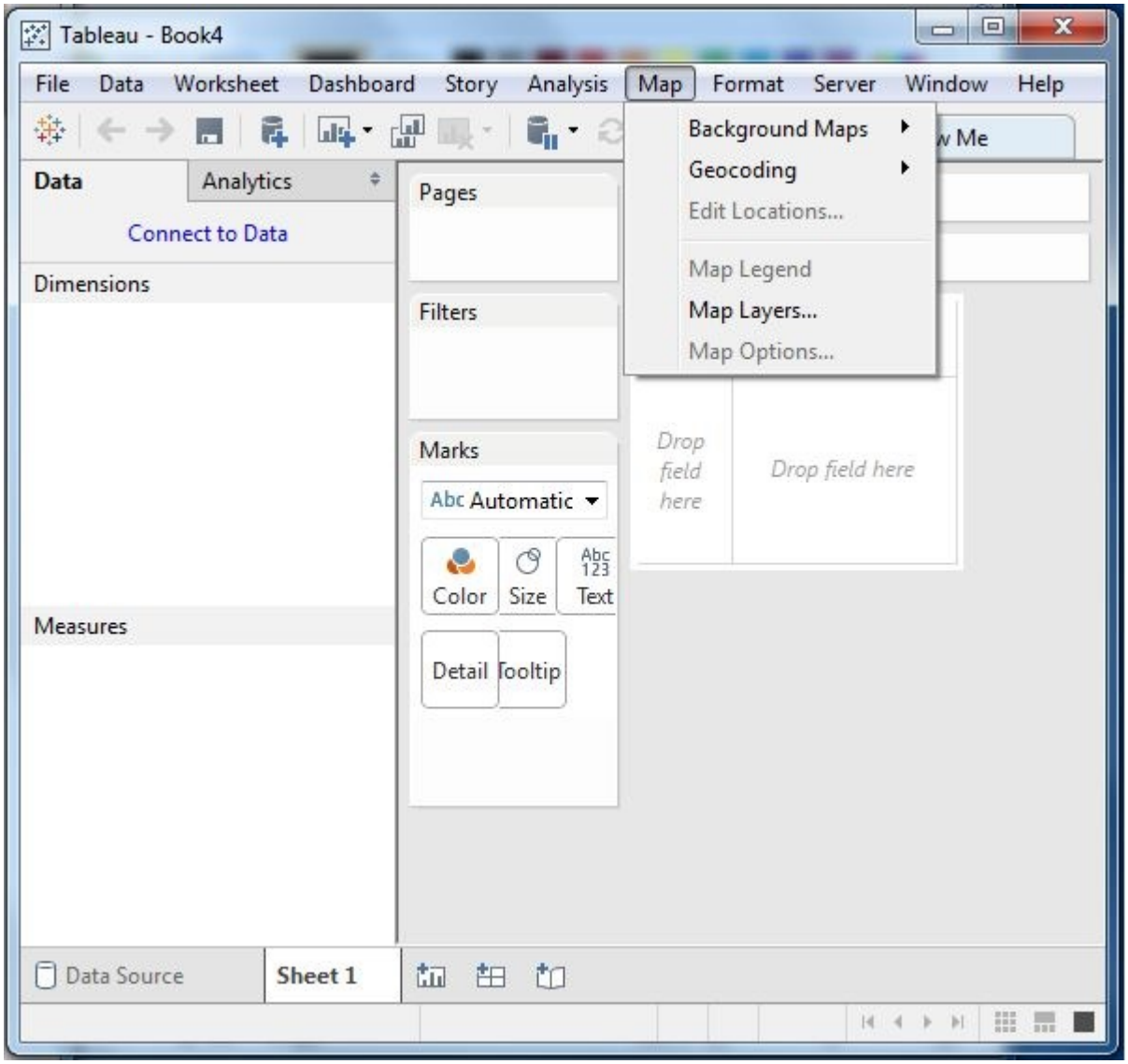



## Map Menu

This menu is used for building map views in Tableau. You can assign geographic roles to fields in your data.

The important features in this menu are as follows −

- **Map Layers** hides and shows map layers, such as street names, country borders, and adds data layers.
- **Geocoding** creates new geographic roles and assigns them to the geographic fields in your data.

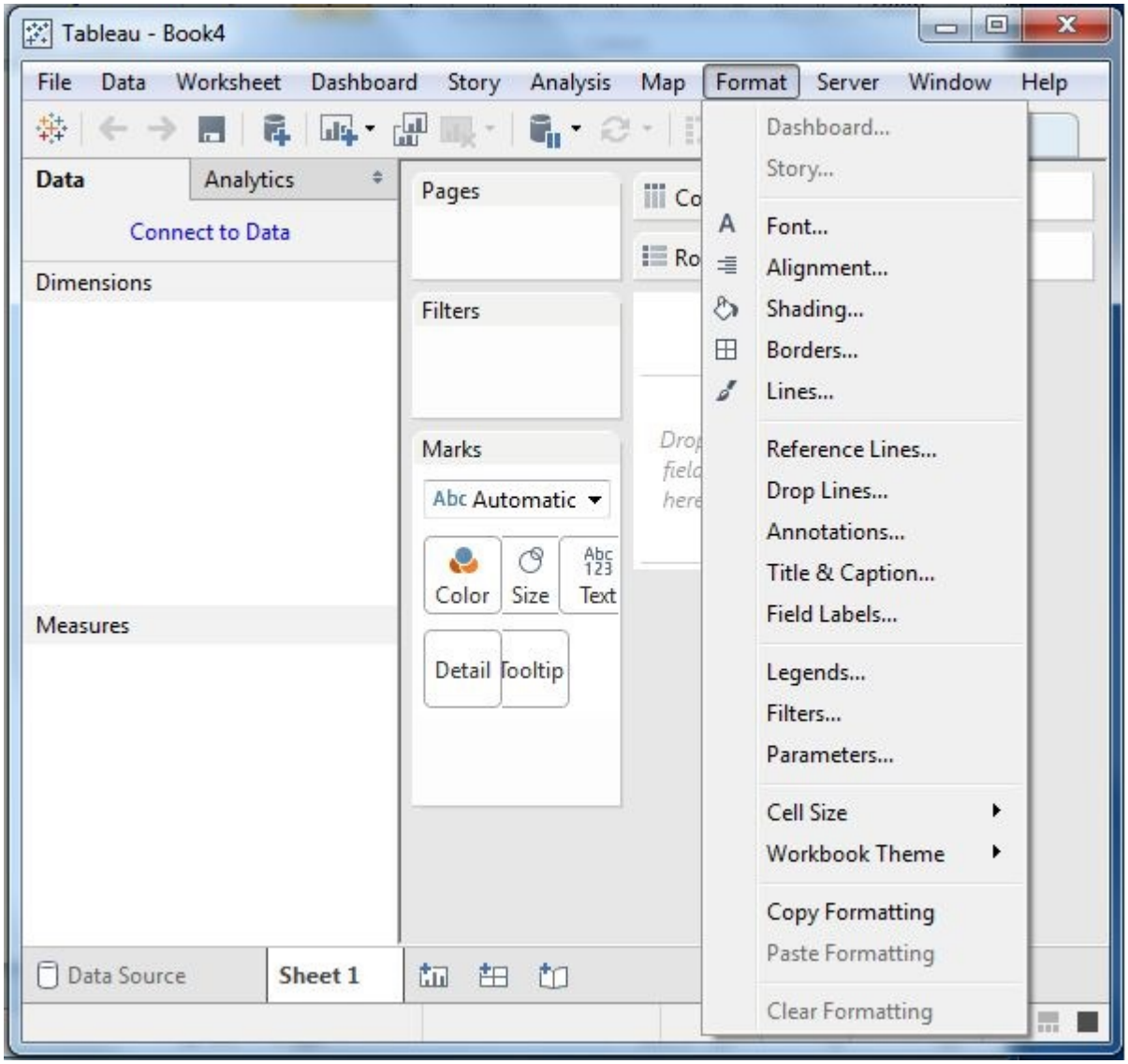



## Format Menu

This menu is used for applying the various formatting options to enhance the look and feel of the dashboards created. It provides features such as borders, colors, alignment of text, etc.

The important features in this menu are as follows −

- **Borders** applies borders to the fields displayed in the report.
- **Title & Caption** assigns a title and caption to the reports.
- **Cell Size** customizes the size of the cells displaying the data.
- **Workbook Theme** applies a theme to the entire workbook.




## Server Menu

Server Menu is used to login to the Tableau server if you have access, and publish your results to be used by others. It is also used to access the workbooks published by others.

The important features in this menu are as follows −

- **Publish Workbook** publishes the workbook in the server to be used by others.
- **Publish Data Source** publishes the source data used in the workbook.
- **Create User Filters** creates filters on the worksheet to be applied by various users while accessing the report.

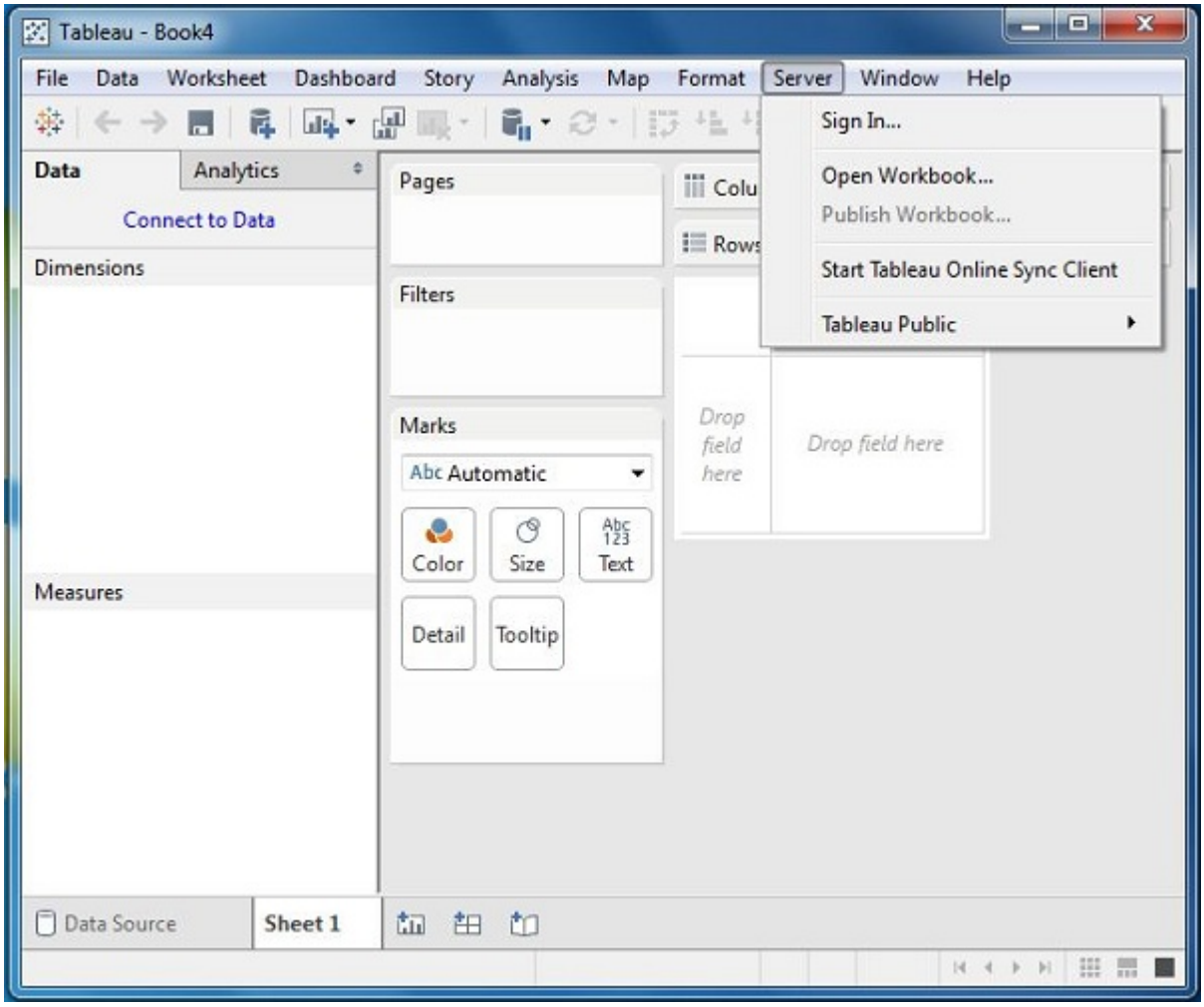


Tableau - Book4
File
Data
Worksheet
Dashboard
Story
Analysis
Map
Format
Server
Window
Help
Sign In...
Open Workbook...
Publish Workbook...
Start Tableau Online Sync Client
Tableau Public
Data
Analytics
Connect to Data
Dimensions
Measures
Pages
Filters
Marks
Abc Automatic
Color
Size
Abc 123
Text
Detail
Tooltip
Colu
Rows
Drop field here
Drop field here
Data Source
Sheet 1