# Tableau Consumer User Guide

This guide was developed with the consumer of Tableau dashboards in mind. The goal of the guide is to describe the basic functionality and interaction that may occur when interacting with a Tableau dashboard. It does not contain any information on building and designing of Tableau dashboards, though it may provide insight to those who develop and maintain these workbooks.

## Connecting to and Navigating Tableau Server

Tableau workbooks can be shared in two different ways, depending on how the developer shared the document.

| Shared the workbook with a direct link: | |
| --- | --- |
| 1. For users with a direct link to their workbook, click the link to travel to the URL. |  |
| 1. Authenticate using campus or health system methods. |  |

| Shared the workbook, but the user needs to navigate to it: | |
| --- | --- |
| 1. For users without a direct link to the workbook, they will need three pieces of information about the workbook: the site name, the project name, and the workbook name. |  |
| 1. Open the Tableau home page. This will differ between the Health System and Campus: | Campus: <https://tableau.dsc.umich.edu>  Health System: <https://tab.med.umich.edu> |
| 1. Authenticate using campus or health system methods. |  |
| 1. Once login is complete, the user may be prompted to select a site. Select the site indicated by the workbook designer from step 1 above. If there are questions about which site to choose, consult with the workbook designer. |  |
| 1. Select the Project indicated by the workbook designer from step 1 above. If there are questions about which Project to choose, consult with the workbook designer. |  |
| 1. Open the Workbook indicated by the workbook designer from step 1 above. If there are questions about which Workbook to choose, consult with the workbook designer. Once the Workbook is open, select any of the views included to open the dashboard. |  |

## Dashboard Usage - Filters

Filters are provided by the workbook designer to allow the user to narrow down the results of the dashboard. Sometimes they will apply to just one chart. Other times, they will apply to the whole dashboard, or even the whole workbook. It depends on the subject matter and the workbook designer how they will apply.

| Types of Filters | | |
| --- | --- | --- |
| Single Select Radio | Allows the user to select one and only one of the options via a radio button. |  |
| Single Select Pull Down | Allows the user to select one and only one of the options via a pull-down menu. |  |
| Single Value Slider | Allows the user to scroll through options one at a time via a left to right slider. |  |
| Multiple Values List | Similar to a Single Select Radio filter except the option is available to select multiple objects at once. |  |
| Multiple Value Pull Down | Similar to a Single Select Pull Down filter except the option is available to select multiple objects at once. |  |
| Multiple Value Custom List | Allows a user to type in a series of values that Tableau will then search for within the filtered field. This is not commonly used. |  |
| Wildcard Match | Allows a user to search for values in a field using wildcard symbols - typically the \* symbol is used to search for items based on how they begin or end (example: Rev\* will find Revenue). |  |

Filters may or may not contain an “All” option, which allows the user to select all options in the field. Filters may be set up to exclude values instead of including them, though this is rare. Some multiple value filters may show an “Apply” option. This gives the user an opportunity to change filter values without forcing the visualization to re-draw with each change.

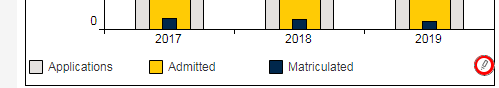
Occasionally designers will incorporate filters into the actual views on a dashboard. In this case, clicking on one visualization will filter the results of another. This is often used to provide more detail on the selected part of the primary chart. Once the first chart has a data point(s) selected, the second chart will filter down to just show results based on the selected portion of the first chart. To return to the base view, click on the selected data point again. This should unselect the point and return to the original view in both charts.

| If at any point you cannot figure out how to remove the filters or reset the charts, click the **|←**Revert button at the top of the page. |
| --- |

## Dashboard Usage - Highlights

Most visualizations and legends can be clicked on and highlighted to pull out specific details on a chart. If the user is interested in a particular point or series of points, a highlight will pull this data to the forefront. One a point or series of points is selected, the remaining parts of the visualization fade out. To return to the normal view, simply click the same field again.

In some dashboards, highlights will apply across multiple charts. Occasionally, highlight needs to be enabled on a legend in order for it to be used. To enable highlight, hover over the legend and click on the highlighter icon that appears in the upper right:



Not all charts will have highlighting enabled.

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## Dashboard Usage - Hierarchies

In many cases, visualizations have the ability to drill down to a more granular label. One of the most popular ways to do this is through a hierarchy. Unfortunately, hierarchies are not always easy to identify and use.

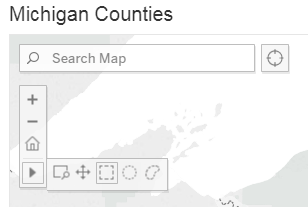
While hierarchies may be available for data, that doesn't mean they were incorporated into the dashboard currently being used. One example of a hierarchy is a date:

| * + Month     - Week       * Day |
| --- |

| How to Identify and Use a Hierarchy | |
| --- | --- |
| 1. Hover over the header of a field that is indicated as a hierarchy. If the field is a hierarchy, a [+] should appear. |  |
| 1. Click the [+] to expand the hierarchy and see the first sub level. It may take some time for the visual to render the next level.   Some hierarchies may have additional levels. If so, the new header will also have a [+] on it. |  |
| 1. Hover over the primary header again and click the [-] to collapse the hierarchy back to the original level. |  |

## Dashboard Usage - Maps

Some tableau dashboards have maps, and these maps can offer some unique interaction. The interactive menu for most maps is available in the upper left. Hover over the map to make it appear:



| Map Controls | |  |
| --- | --- | --- |
| Search | Allows the user to search for specific points on the map based on the dimension used (country, state, zip, etc). |  |
| Zoom In | Allows user to zoom in on the center point of the map. |  |
| Zoom Out | Allows user to zoom out. |  |
| Zoom Home | Returns map to base zoom. |  |
| Zoom Select | Allows user to use a selection box to zoom in to a specific section. |  |
| Pan Map | Allows user to move the map up, down, left, or right. |  |
| Select with Box | Selects all points within a selection box. |  |
| Select with Circle | Selects all points within a circular area. |  |
| Select by Path | Allows user to draw a freeform line around a group of points and select them. |  |

## Custom Views

Custom Views allows the user to save pre-filtered and formatted versions of the published dashboard.

The user manipulates the dashboard to a specific set of selections and then saves these settings. Once the settings are saved in a custom view, they can be quickly reapplied the next time the user visits this dashboard. This can be very useful on complex wide-ranging reports where the user is only interested in specific information.

| Creating a Custom View | |
| --- | --- |
| 1. Open the dashboard of interest. Use the filters to narrow down the dashboard to the specific data of interest. |  |
| 1. Once the dashboard is filtered to the desired choices, click the View: Original link in the gray status bar above the visualization. An \* next to the icon means the view has been changed in some way. The selection is set to Original by default. |  |
| 1. A new window will appear. In this window, users can name the view, set it as the default view each time they visit this dashboard, and make the view public for others to use. Type a name for the view and check the appropriate boxes, then click save. |  |
| 1. Once a view is saved, it will appear in the list below the My Views header. Other views available to the user are listed below. Existing views under My Views can be renamed, made public, or deleted using the Manage gear icon in the lower right. |  |

## Subscriptions & Alerts

Near the custom views button to the upper right of most dashboards is a Subscribe button. This button can be used to subscribe users or groups to a view. Subscribing to a view sends a copy of the selected view or workbook as a message to the subscribed users or groups via email.

| Subscribing to a View or Dashboard | |
| --- | --- |
| 1. Open the dashboard of interest. Use the Subscribe button in the upper right to open the subscription window. |  |
| 1. The subscription window contains multiple options:    1. Subscribe Users - fill in the uniqnames of users that need to receive this workbook or view on a scheduled basis.    2. Subscribe Groups - this subscribes entire groups to a workbook or view. Tableau handles this by identifying the group members and adding them as subscribed users one at a time. If more users are added, the subscription will need to be updated.    3. Include - choose to include the single view one the screen or the collection of views in the entire dashboard.    4. Schedule - choose the frequency the email will be sent (contact appropriate support team to add new schedules).    5. Subject - choose the subject line of the outgoing email    6. Message - add a message    7. Don’t send if view is empty - will not send the email if no data is returned    8. Subscribe me - subscribe yourself |  |

| Managing Existing Subscriptions | |
| --- | --- |
| 1. Click on the user initials in upper right corner of Tableau web page. In the menu that appears, select My Content. |  |
| 1. While looking at your personal content, click on the subscriptions link at the top. |  |
| 1. Click on the [...] next to any subscription:    * Change the schedule    * Change the subject    * Change empty status rule    * Unsubscribe |  |

## Exporting Data from a Dashboard

Data within a view can be downloaded to a CSV file. This can only happen if the owner has granted permission to download the underlying data.

| Managing Existing Subscriptions | |
| --- | --- |
| 1. Click on the visualization with the data you wish to download. You must do this step. |  |
| 1. Once the visualization has been selected, click the download button and then choose the type of data you wish to have. |  |
| 1. The two types of data are both csv.:    * Data - this option displays a list of the data as well as a link that allows you to download as a csv. This method will allow for a download of the data summarized to the view or the full data.    * Crosstab - this option will generate a csv crosstab of the data and automatically prompt for download. |  |

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## Printing a Dashboard

| Managing Existing Subscriptions | |
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| 1. Open the visualization you wish to print. |  |
| 1. Visualizations can’t be printed as-is from the browser window. The visualization needs to be downloaded as a PDF first. Click on Download and then choose PDF. |  |
| 1. Once download as PDF is selected, options will be provided to download:    * This View - Download entire workbook as it appears on screen.    * Specific sheets from this dashboard - Download specific charts from the currently viewed dashboard.    * Specific sheets from this workbook - Download specific sheets from this dashboard or any other dashboard (tab) in the workbook. |  |
| 1. Once the PDF is downloaded, open and print from the PDF. |  |