



Free Training Transcript:
Viz in Tooltip

Welcome to this video on viz in tooltip. You can download the Exercise workbook to follow along in your own copy of Tableau.

Tooltips are a powerful way to enhance a visualization or analysis by providing additional information when hovering over a mark. For general information, check out the video on Basic Tooltips.

Viz in Tooltip

With the viz in tooltip feature, you can put a secondary (target) visualization into the tooltip of a primary (source) viz. When you hover over a mark, the visualization in the tooltip is automatically filtered to just the relevant data. Placing a viz into a tooltip is easy. Start by creating both sheets. Then, from the main (source) viz, click the tooltip shelf to bring up the dialog. From the Insert menu, choose Sheets, then select the target sheet that should appear in the tooltip. Click OK, and now when we hover over a mark on the source viz, the tooltip displays the target viz.

Size of the Target Viz

When you create a viz in tooltip, you want to consider the size. If the target viz is too large, the tooltip will indicate “view is too large to show”. By default, the target viz is 300 by 300 pixels. We can edit the tooltip to manually change the size if we choose, but be careful that it doesn’t detract from the main visualization (we recommend not going over 600).

Alternatively, we can go to the target sheet and set it to show “entire view” instead of “standard”. This will ensure that it adjusts to fit the allowed dimensions in the tooltip. (This should be used with caution to ensure the viz is still readable.)

Modifying the Tooltip

A tooltip can contain more than just the target viz or vizzes. We have the ability to customize the tooltip around the viz for things like formatting and additional content. Here, we can provide some context. We can use the Insert menu to add fields so the values appear dynamically. And we can turn off the command buttons.

However, some edits must be made on the target viz itself. Here, I think the axis title of “Sales” is unnecessary with the added text above, so I want to turn it off. There’s no

option the tooltip dialog that lets us do this. Instead, we have to go back to the target sheet, and edit the axis, removing the title here. Changes to the viz used in the tooltip must be made on that sheet.

Filtering

On the sheet for the target viz, we can see two things. One, the viz as it appears is much larger than in the tooltip, and two, there is a “tooltip” filter on the Filter shelf. When a tooltip containing a viz is displayed, the target viz is filtered based on what mark we’re hovering over in the source viz.

By default, the target viz is filtered by “all fields”. What this means depends on how the source viz is built. For example, here each mark is the number of countries in a given region. The target viz is the category sales for each of those countries, so as we hover over different marks, the target viz is filtered to category sales for only the countries in that region.

If we were to add something like Category to Color on the source viz, we go from 18 to 54 marks. Each color in the stacked bar is now a mark of its own, and the target viz in the tooltip is now filtered to just the sales for that category for the countries in this region. We can use how the sheets are built to control how the filtering occurs, or we can specify a certain field or fields. In the Edit tooltip dialog, we can replace the filter option, here, so instead of saying “All Fields” we insert a specific field, such as just Region.

Now in the view, the target tooltip is only filtering to show countries in that region and displays all three categories, regardless of which mark in the stacked bar we’re hovering over.

Tips for Viz in Tooltip

Here’s an extra little tip: although we can’t bring a color legend into the tooltip with the target viz, we can get creative with text formatting. We know the target viz has three colors, representing Technology, Office Supplies, and Furniture. Then use the text color, picking more colors, and then picking a screen color to color each category’s name be the color it appears. Now back in the source viz, we can take category off color because it’s cluttering up the view, and the tooltip still conveys that color legend information.

Finally, note that: the viz in the tooltip is a static image, not an interactive viz in its own right. A target sheet can only be used in the tooltip for one source sheet at a time, though multiple target sheets can appear in the same tooltip. Filtering on specific fields can only

be done from within a single data source, and only sheets (not dashboards or stories) can be shown in tooltips.

Conclusion

Thank you for watching this viz in tooltip training video. We invite you to continue with the Free Training videos to learn more about using Tableau.