

Lesson 5 – Exercise 5.1: Using Title, Caption, and Tooltip

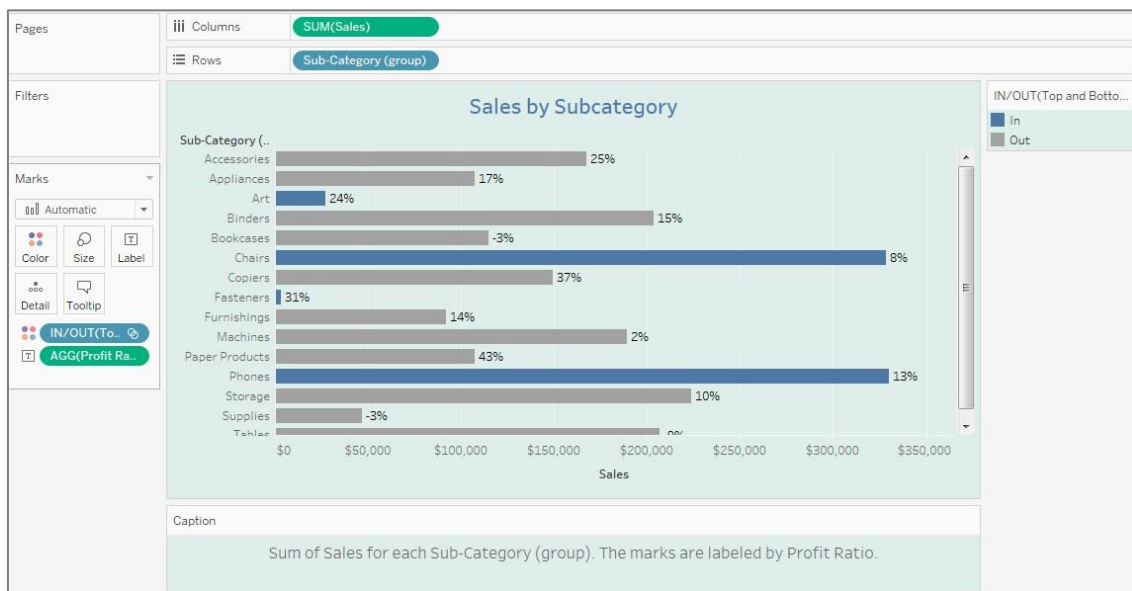
Business Scenario

The production manager of a retail company previously analyzed the performance of various subcategories. Now, he is expected to present his analysis in the upcoming board meeting, so he needs to format and annotate the pre-created views to make them more presentable and readable.

Overview

- Use the previously created Sales by Sub-Category view.
- Enable caption.
- Format title and caption.
- Add profit ratio to tooltip and format it.
- Add color shading to the view.

The result should resemble the image below:



Detailed Instructions

1. Open **Tableau 10.x** (You can go to Start Menu -> All Programs -> Tableau 10.x).

2. Under **File**, click **Open**, navigate to the workbook folder, and select the **Grouping & Alias** workbook.
3. Navigate to the **Sales by Sub-Category** worksheet.
4. Drag the **Profit Ratio** measure to the Tooltip shelf.
5. Double-click the **Tooltip** shelf to format it: Select the text and Set the Color to Blue. Make other changes as needed. Once done, Click **OK**.
6. Click the **Show/Hide Cards** button on the toolbar and enable **Caption**.
7. Observe the title and caption in your view.
8. From the Menu, Go to **Format -> Shading** and set the Worksheet shading to Light Blue.
9. Double-click the Title bar to format it.
10. Double-click the Caption to format it.
11. Save and Close the workbook.