

TB Terms/ Glossary

Aliases

Alias is an alternative that you can assign to a dimension member, to a measurement part or a field.

Bin

Bin is a user-defined group of measures in the data source.

Bookmark

A .tbn document in the bookmarks folder in the Tableau repository that contains a single worksheet. It helps in improving data analysis. Unlike, web browser bookmarks, .tbn files are a compatible way to display various studies quickly.

Calculated Field

Calculated field is a new field that the user creates derived files by using a formula to modify the existing fields in your data source. It is used to make your work simple and easy.

Calculated fields are custom fields created by a Tableau author. This feature has infinite applications, including the capabilities to do all of the following:

There are three core types of calculated fields, each with its own unique uses and benefits:

Crosstab

Text table view. Text table can be used to display the numbers associated with dimension members

Another name for a text table or a table of numbers.

Dashboard

A collection of views shown in a single location where you can compare and monitor a variety of data simultaneously.

Discrete Versus Continuous

The second major way Tableau classifies every field being used on a view is called discrete versus continuous. This classification is what the blue and green color-coding throughout Tableau Desktop's interfaces represent. Anytime you see blue, the field being used is discrete. Anytime you see green, the field being used is continuous.

Each classification has unique characteristics that will help you create every visualization in Tableau. Most notably, discrete fields draw headers that can be sorted, and continuous fields draw axes that cannot be sorted.

Data Pane

The data pane is on the left side of the workbook displays the fields of the data sources to which Tableau is connected. The fields are further divided into measures and dimensions. The data pane also reflects custom fields such as groups, binned fields, calculations, and many more. You can build views of your data by dragging fields from the data pane onto the various shelves, which is a part of every worksheet.

Data Source

The underlying data that Tableau Reader is connected to. You can't change the data source in Tableau Reader.

Data Source Page

Data Source is a page where you can set up your data source. This data source page generally consists of four main areas ? join area, left pane, a preview area, and metadata area.

Filter

A control on a view that limits the data shown in a view. For example, a filter on Region that only includes the West.

Filter Shelf

Shelf on the left of workbook that you can use to exclude data from view by filtering it using measures and dimensions

Extract

SA n extract is a saved subset of a data source which is used to improve performance and study offline. The users can create an extract by defining limits and filters that contain the data which you want in the extract.

Dimension

Dimension is commonly known as a field of categorical data. Dimensions hold discrete data such as members and hierarchies that cannot be aggregated. It also contains characteristic values such as dates, names, and geographical data. The dimensions used to reveal details of your information.

Format Pane

The Format pane is on the left side of the workbook, and it contains various formatting settings. It controls the entire view of the worksheet, as well as the individual fields in the view.

Level of Detail (LOD)

The level of detail Expression is a syntax that supports the combination of various dimensions other than the view level. With the help of detail expressions, one can attach multiple dimensions with an aggregate expression.

Marks

A visual representation of one or more rows in a data source. Mark types can be bar, line, square, and so on.

We can control sort, shading, size of imprints

Measures

By default, Tableau classifies quantitative fields as measures. Measures are considered dependent because they tell us very little on their own

Marks Card

A card to the left of view where you can drag field to control mark properties such as type, color, size, shape, label, tooltip, detail

Parameters

Parameters are user-generated values that are not tied to a data source. These values can be used as inputs within calculated fields, reference lines, and/or filters. What makes this feature powerful is that after the author sets the limits of the values available in the parameter, the author and their users can change the value on-the-fly by using a parameter control or dashboard actions

You can create a parameter by right-clicking any blank space on the Data pane or by left-clicking the down-arrow in the top-right corner of the Data pane and choosing Create ...

Packaged Workbook

A type of workbook created in either Tableau Desktop or Tableau Server. These files contain both the workbook as well as copies of the referenced local file data sources and background images.

Pane

The row and columns areas in a view.

Pages Shelf

Page shelf is on the left side of the view. With the help of the page shelf, you can split a view into a sequence of pages based on the values and members in a continuous or discrete field. Adding a field with the pages shelf is similar to adding a field in rows shelf. For each new row, a new page is created.

Row Shelf

Row shelf is on the top of the workbook. It is used to create the rows of a data table. The Row shelf provides any numbers of measures and dimensions. When you placed a dimension on the Rows shelf, then Tableau creates headers for the members of that dimension. And when you place a measure on the Rows shelf, Tableau creates quantitative axes for that particular measure

Repository

A folder located in your .. folder that stores workbooks

Sets

Sets are Boolean fields that classify dimension members as either In or Out. The ability to isolate dimension members into sets allows the author to treat them in different ways. Sets can be used as a filter, as a dimension, within calculated fields, and as a highlighter.

Shelves

The shelves are named areas that are located on the top and left of the view. You can build views by placing fields onto the shelves. Some shelves are only available when you select a particular mark type. For example, The Shape shelf is only open when you choose the specific Shape mark type.

View

The visual representation of your data in a worksheet or dashboard.

Workbook

File with .twv extension that contains one or more worksheets (incl dashboards & story)

A collection of one or more worksheets and dashboards.

Worksheet

Sheet where you build views of your data by dragging fields into shelves

A single view of data. Each worksheet can be connected to a single data source.