



On-Demand Training: The Tableau Interface Transcript

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

Once we connect to data, we'll click on a sheet tab. Sheets are where we can build visualizations. Let's go over some of the various areas of the screen.

Menus & Toolbar

At the top, we have the menus. The layout may look slightly different on a Mac. The menus contain a lot of powerful controls, I recommend clicking through to see what options they contain.

Below is the toolbar, with buttons like undo and save – there's no automatic save in Tableau, so make sure to save your work periodically. These buttons are contextual to what's going on in the sheet. For example, if we have a sheet that has data, the clear sheet button is no longer greyed out.

The logo button here brings us back to the start experience, where we can access saved data sources, recently opened or pinned workbooks, etc.

Data Window

To the left of the screen is the data window. If we're on the data tab, the top lists all open data connections, and depending on which one is selected, the fields from that data source are listed below, broken out into dimensions and measures. The data window will also show any sets or parameters you may have.

- If we open the map options or the format pane, these temporarily cover the data window. To get back to the data window, simply close the other pane.
- The data window can also be minimized like so, and then re-expanded.
- Down here at the bottom is the status bar. This shows the number of marks in the view as well as other summary information.

Analytics Pane

If we click to the Analytics tab, here, we're brought to an entirely new pane. Here we can bring out pieces of our analysis directly as drag and drop elements. If they're not relevant to the type of view, certain elements will be greyed out, such as totals on a timeline.

If we select something like a trend line, we can bring it to any of these drop areas to control aspects of its properties, like model type and which measure it should apply to.

Sheet Tabs

New sheet tabs are found here at the bottom. We can create sheets, dashboards, and stories with these tabs. Do thing like rename the sheets, drag to rearrange them, duplicate sheets, copy formatting, and many other things. If the workbook has a lot of sheets, we can navigate easily with these controls.

Shelves and Cards

Finally, and perhaps most importantly, we have the shelves. A view can be built by dragging and dropping fields from the data window into the canvas directly, or onto the shelves.

Shelves are sometimes also referred to as cards.

- There's the Columns shelf and the Rows shelf here,
- the Pages shelf,
- Filter shelf,
- and Marks Card

It's also possible to type directly into the Columns or Rows shelf if you know the name of the field you want to use. We can also write a calculation directly the same way.

Marks Card

The Marks Card is made up of several other shelves, each of which can have fields placed on them and can be clicked on to edit their characteristics, such as label.

- Changing the mark type can change the shelves on the marks card, such as selecting shape brings up the shape shelf.
- Depending on the composition of the view, there can be multiple marks cards, one for each measure.

Legends

Legends, such as for color, size, and shape, will automatically be created when a field is placed on the color, size or shape card. However, legends can be removed by clicking on the menu, and selecting hide card. To bring a legend back, either right click in the space under the marks card, select Legend and choose which legend to bring back, or use the Analysis menu.

Layout for Dashboards & Stories

If we're on a dashboard or story instead of a simple sheet, the layout changes a bit. Instead of having the data window on the left, we have a dashboard window

- with a list of all the sheets available
- dashboard objects such as layout containers and text boxes
- controls for those objects
- and sizing options

Stories have a similar layout in the story pane.

Conclusion

Thank you for watching this video on the Tableau Interface. We invite you to continue with the On Demand Training videos to learn more about using Tableau Desktop