On-Demand Training: The Formatting Pane Transcript

Welcome to this video on the Formatting Pane. You can download the Exercise workbook to follow along in your own copy of Tableau. This content builds on the Formatting video.

In Tableau, some formatting is controlled by the Format Pane. This is a powerful tool to control the look of a workbook and bears some explanation.

Formatting Menu

We can open the Formatting menu from the toolbar – this gives us easy access to specific aspects of formatting– such as font and alignment.

Similarly, right clicking on a specific part of the view and clicking Format will also open the formatting pane. It opens over the data window and needs to be manually closed when formatting is complete.

Format Pane Settings

The formatting pane is contextual, it changes based on the item being formatted, here it's for the field whose header I clicked on. If we click around, whatever is selected will be the element that the formatting pane pertains to.

If we click in white space in the view and select format, here's the non-field specific layout.

First, we see the type of Format Settings

- Font, Alignment, Shading, Borders, and Lines.

Font

Font allows us to control things such as

- The font, size, color,

    - Let's set the worksheet to be Aharoni, size 10, and dark red

    - We can independently control the totals and tooltip if desired

    - If we formatted the font of the label, that formatting takes precedence over this setting

We're currently on the Sheet tab – alternatively we could work independently with the rows or columns, and have our changes apply only at that scope.

Once we've modified an option, that control becomes bold.

- This is an easy way to keep track of what changes have been made.

- It's also possible to clear any modifications at the bottom of the pane.

Alignment

Our next formatting choice is Alignment

- Clicking on the dropdown for the default Pane, we see our options include Horizontal, direction, vertical, and wrap

    - Pane controls the alignment inside the pane, such as mark labels – we'll make our pane direction vertical.

- Headers are things like the market and country names, we'll align those centered

Note, as we go along, often isn't how we should format things, I just want to make it clear what is impacted by each type of formatting. So we'll clear this using that button at the bottom

Shading

Next is Shading

- Here, the new options are Row and Column Banding. We can set the color for pane or header, let's make them different so we can see what's going on

- And we can also adjust the band size, and level.

- To make this clearer, let's add another market.

    - Setting the Band size here on the first tick makes the band shading alternate every other,

        - the second tick is groups of two, and so on

    - The level is where the bands are grouped – here it's at the Country level, adjusting the slider makes the groupings at the Market level

    - Again, we can use the colors to see that the pane is the shading in the chart itself, and header is the shading for the Country or Market labels

        - Which field is considered the header depends on the level of the banding. If it's shading at the Country level, Country is the header. If it's shading at the Market level, Market is the header.

We'll clear that out so we can see what comes next.

Borders

Let's format Borders

- Borders are the lines that surround the table, pane, cells, headers, and row and column dividers

- We can see what each piece does by playing with it.

    - Let's make our default header a thin, dashed, and gold

    - Note where that impacts the view.

    - For clarity, we'll turn it back to none

- What about the row and column dividers?

    - Pane, again, is in the view – we'll set it to be a dashed orange line, note the header will automatically match, though this can be adjusted separately, manually.

- The level, again, controls where the divider goes. Here it's between the markets, if we bring the slider up, now

it's between the countries.

- The column divider is much the same – watch the line between the Order Priorities at the top. Let's turn off the default header line. Note that the line between the Order Priorities went away.

But we'll clear again.

Lines

Last of our major formatting choices is Lines

- Lines are easier to see on a scatter plot, as they include items such as

    - grid lines

    - zero lines,

    - trend lines

    - etc

  - let's make our grid lines green

  - our zero lines dashed,

  - our trend lines nice and thick

  - and a reference lines red

- A common confusion is between border, this box here, and lines, the paintbrush. For example, gridlines in a scatterplot may look like this box icon, but they're not borders around cells or panes, they're lines, so they live under the paintbrush

- By default, gridlines are on in scatterplots and off in most other chart types. They can be turned on for other chart types if desired.

We can clear all formatting easily by coming here to the clear sheet icon and selecting clear formatting.

Copy & Paste Formatting

Once we've gotten worksheet formatting exactly as desired, it's often easier to be able to carry through that formatting to other worksheets.

- Here's our scatterplot formatted just how we want it.

- We also have another scatterplot. We want to have the same formatting we did on the first.

  - Right click on the sheet tab of the formatted view and say "Copy Formatting"

  - Right click on the destination tab and say "Paste Formatting"

- Note what is copied and pasted – worksheet formatting only.

- The mark type, colors, sizing, and reference lines are view-specific, and don't transfer.

- The axes formatting, as well as gridlines did copy.

A quick way to remember this is that formatting done in the format pane will copy and paste. Formatting done in the view, like changing sizing on the Marks card, will not.

Conclusion

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