On-Demand Training: Formatting Transcript

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

Marks Card Options

The Marks Card has many options for formatting, including color, size, marks type…. Even if there isn't a field on one of these shelves, it's possible to click on the shelf and adjust that property. For example, in this view, nothing is encoded by size, but we can still increase the size of the marks, or we can click on Color to add a border. We can change what mark type we have, such as line or Gantt – automatic will be whatever our combination of fields should have as a visual best practice.

Labels

Labels have a lot of options, let's click on this shelf to open it. First off, ticking this box will turn labels o in the view, the same as clicking the "Abc" label button in the toolbar.

We can alter the displayed labels to be more appropriate to the view.

Dragging a field to the label shelf adds it to the label and makes this text option available. Clicking on the ellipses here will bring up the full text editor. This is a powerful window, but only fields that have been added to the label shelf are available to use here.

Labels can be turned on for specific actions (such as highlighting) or for specific points (such as minimum/maximum), they can also be applied across the entire table, per pane, line, etc. It's also possible to turn on or off a specific mark label in the view by right clicking on the point, going to mark label, and choosing the desired behavior, such as always show.

For most views, there's a limited amount of space in the view for labels. Often, the best way to add additional information is through the use of annotations or Tooltips.

Annotations

Annotations are text boxes used to call out a specific mark or point, or an entire area in the view.

- A mark annotation stays with the mark itself, regardless of whatever changes are made on the view.

- A point annotation stays in the same relative position on the view, independently of the mark, as does an area annotation.

- To add an annotation, right click and select Annotate, then chose which type – we'll use Mark

- Like labels, they can have fields added to them as dynamic inputs.

- The size, position, and format can all be adjusted.

    - Single clicking on an annotation brings up handles that let us control the dimensions and position.

    - To format the text of an annotation, simply double click on the text to bring up the editor, we could also right click and select Edit.

    - To format the annotation box or line, right click and select Format

- The box can be adjusted in several ways.

- As can the arrow.

Edit and Format can both impact the visual of a feature, but they control different things. Edit is usually content, format is generally layout. If you're ever looking for how to format something and both Edit and Format are available, check both places.

Tooltips

Tooltips can be a powerful analytical tool, providing additional information when the viewer hovers over or clicks on a mark. Tooltips are very customizable:

- Here's an example of a heavily formatted tooltip to provide a lot of information. Fields provide context and font, color, and bolding help draw attention to the most important aspects.

- Any field in the view can be displayed in the tooltip. Fields not part of the view can be brought to the tooltip shelf

- Clicking Insert brings up the list of fields available to the tooltip

  - We could say *This mark consists of <insert the Number of Records> records*

- If the command buttons (keep only, group, view underlying data, etc) detract from the final experience, they can be toggled off with this check box here.

Tooltips are often underestimated as parts of an analysis, but they can convey a lot of information very compactly

Formatting Specific Parts of the View

Many parts of the view can be independently formatted. To see if a field, number, legend, or other part of the view can be formatted, right click or bring up the menu to see if the format option is available.

- For example, let's create a Quick Filter and format it. Hovering over the filter header brings up the menu caret.

- Click "Format Quick Filters"

  - The Format pane opens, offering us various options for Font, alignment, etc. These options will vary based on what we're trying to format.

  - Many aspects of the layout for the Quick Filter can be controlled in the directly from the menu

Editing and Formatting Axes

To adjust anything having to do with the layout of the axis, right click and select "Edit Axis".

- This dialog controls the range, tick marks, and the title.

- We can edit the range, say upping it to 115, and edit the title, let's spell out average

- Clicking on the Tick Marks tab, we can fix the tick marks to every 50 units instead of every 100.

- Back on the axis, we see those changes.

- Additionally, this pin icon has appeared – this indicates the axis is no longer automatic.

  - Double clicking will bring back that dialog.

If we add a dimension in front of Shipping Cost, such as Order Priority, we now have an axis per dimension.

- When we right click and select Edit Axis now, it now makes sense to either use

  - "Uniform axis range for all rows or columns",

  - or "Independent axis range".

  - If we select Independent, Tableau will automatically rescale the axes independently of each other.

To hide an axis entirely, right click on the axis and uncheck Show Header.

- Right clicking on an axis and selecting Format will open the Format Pane,

  - and allows for visual control of what the tick marks look like, the fonts, alignment, etc.

  - if we click from one axis to the other, notice how the format pane reflects whichever we've clicked on

Map Options

When working with maps, there are map-specific formatting options available.

- The circles on the map were formatted on the Marks Card.

- But to format the map itself, click the Map menu, then select "Map Options".

- This pane opens over the data window just like the formatting pane.

  - Here, we can change our map style – Dark, Light, or Normal

  - Control the washout

  - And control map layers, such as borders and names.

    - Some options, such as streets and highways, can be turned on only when the map is sufficiently zoomed in

  - Let's search for Tokyo, and now we can turn on Streets and Highways

  - Depending on your map's location, data layers can also be added, such as census data

 If there's a subset of map layers we want to use regularly, we can click "Make Default". These settings will apply by default to any new maps created in future workbooks

Conclusion

Thank you for watching this Formatting the View training video. There's more information on Formatting in the Formatting Pane video later in this section. We invite you to continue with the On Demand Training videos to learn more about using Tableau Desktop