

Tableau Dashboard Quick User Guide

This Quick User Guide provides brief information on how to navigate and interact with Tableau dashboards and charts.

BASIC NAVIGATION

Some dashboards have tabs across the top of the screen, which correspond to different views. Select a tab to move to a different view.



Some dashboards have graphic navigational tools, such as these arrow and icons.



Select a record and/or click the arrow icon to advance to the new page/view.



Click the home icon to return to the designated “home” view.



Display / Hide optional filters

INFORMATIONAL FEATURES

There are several common features available on each dashboard to provide additional information.

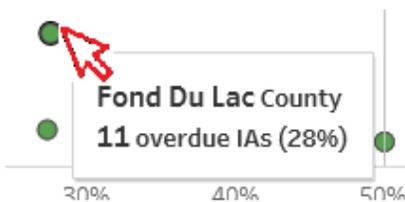
To activate, move the cursor on top of the object (hover on it) to display the tooltip text.

 The Dashboard hover help describes the dashboard purpose & objective, the primary measure(s), the data sourcing, and related policies or logic. It is always in the top right corner of the dashboard (of varying color)

 The blue Info icon is used to provide more information about specific element(s) within the dashboard.

UNDERSTANDING CHARTS AND DATA

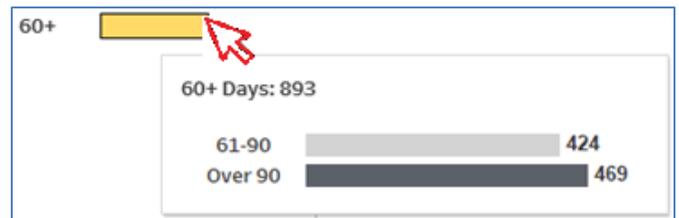
Charts on the dashboard generally have an interactive ‘Tooltip’ that provides additional and specific data information.



Example: In this small excerpt, the tooltip for the selected chart mark has been activated by hovering the mouse cursor over the dot. The pop-up information box provides the specific count and percentage for this data-point on the chart.

Sometimes additional information is also presented as a chart. This is known as a “Viz in Tooltip”.

Here, the yellow bar corresponding to 60+ has been activated, and in addition to the specific data value (893) a chart is shown with a breakdown of more detailed timeframe groups and their respective counts.



Note: Viz in Tooltip content is not interactive. It is view-only additional information.



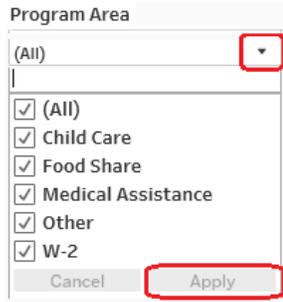
On some dashboards, a chart may have supporting Viz in Tooltip charts for more detailed information.

This icon identifies Viz in Tooltip content that may be displayed **without** engaging associated chart filters.

FILTERS

Dashboards often contain user-selectable filters, which allow a user to adjust the content & results to fit their specific needs. These filters allow a user to limit the dashboard to specific data or based on selected attributes and values.

DROPDOWN FILTERS



Click on the filter triangle to see available options.

If multi-value selection is enabled, select one or more values' check-boxes then click on Apply to filter the chart(s) on the dashboard.

Note: Apply and Cancel buttons in the drop down filter are activated only when the values are selected from the drop down list.

Filters with more than 5 values will have a search box at the top or bottom of the list of options. Type in the box and then select the value from the list and click on Apply. To clear the search box click on the "X" to the right side of the box.

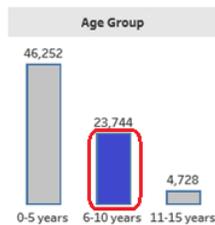


To easily clear filters, click the  icon, which will be in the filter's corner. 

CHART FILTERS

Charts on the dashboard are generally interactive (unless stated otherwise) and when selected they apply filtering to the other charts **on the same dashboard tab**.

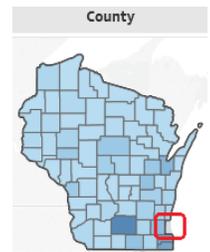
A simple example is a performance measure map of the state. Clicking on one or more counties within the map will filter other charts within the dashboard for the selected values.



The same is true for a bar, line or data chart.

Clicking on a data point, chart value or even a date will filter the other charts of the dashboard.

Note: To multi-select values on any chart hold CTRL button and left click to select multiple values. Or they can be selected using the mouse by "lassoing" the chart marks (this also works on maps).



DATE FILTERING



A date slider is provided on many dashboards to adjust the time period of the view.

The time period can be adjusted quickly with the help of the slider, though not always as precisely as desired.

To be more precise a calendar can be activated by clicking on the left/right date fields as shown. This will display a full calendar allowing selection of any exact date. An exact date can be typed.

Note: Default date display is m/dd/yyyy and is independent of the run-time display timeframe on the dashboard. **Example:** Default timeframe display on the dashboard charts is set to Quarterly aggregation.

If the user sets start date to 2/16/2018 data will be displayed on the dashboard for Q1.

But, it will only include 2/16/18 and later. The first 15 days of February, and all of January, will **not** be represented within the quarterly aggregation. In order to capture **all** data within Q1, the exact start date must be set as January 1, and end date set to March 31.

