A POCKET GUIDE FROM

DATA DOZEN

a visual analytics studio

60 TABLEAU TRICKS IN 30 MINUTES · KANSAS CITY TABLEAU USER GROUP · ERIN WALDRON

TABLEAU SPEED TIPPING

ORGANIZED DATA · TIDY WORKBOOKS · BEAUTIFUL VISUALIZATIONS · FLEXIBLE DASHBOARDS

ORGANIZED DATA

DATA SOURCE

Set your workbook up for efficient data sources while you draft.

1) LIVE VS. EXTRACT

Toggle live connections to an extract to speed up your queries while you're drafting in Tableau.

2) DATA SOURCE FILTERS

Just bring in the data you need for your workbook by creating a filter on the whole data source.

DATA PANE

Save time later by optimizing your data pane before you start building.

3) DATA TYPES

Click on the little icon next to each data pill to change the data type when Tableau has guessed wrong.

4) NUMBER OF RECORDS

Make sure that all your data loaded by checking the number of records or count field Tableau has generated.

5) FOLDERS

Organize your variables in the data pane by splitting them up into convenient folders.

6) SEARCH BOX

Quickly find the variable you're looking for in a large data set with the data pane's search box.

7) DEFAULT PROPERTIES

Set a data pill's default sort order, number format, or aggregation so it's ready each time you use the field.

8) HIERARCHIES

Nest variables that are part of the same taxonomy by establishing hierarchies in the data pane.

9) REPLACE REFERENCES

Point broken variables at the correct replacement variable when you swap out your underlying data source.

10) HIDING DATA PANE

If your data pane suddenly disappears, check the bottom left hand corner and click the double arrow icon.

CALCULATED FIELDS

Extend the functionality of your data by creating new variables.

11) PREFIX NAMES

Create a consistent prefix for each of your calculated fields like "CALC" to easily identify them later.

12) FUNCTIONS

Explore all of the functions in Tableau's syntax by expanding the little arrow on the right of the popup box.

13) APPLY BUTTON

Test your logic quickly by using the Apply button to see if your calculation works without leaving the popup box.

14) COMMENTS

Add comments in your calculations with // to explain to colleagues or your future self why the logic works.

15) THE CALCULATION IS VALID

This grey text means that Tableau can execute your logic, but it doesn't mean that your calculated field is accurate.

TIDY WORKBOOKS

MENU BAR

Keep your worksheets and dashboards neat and searchable.

16) DISPLAY OPTIONS

Use the three icons in the bottom right corner to see all your worksheets as a grid, a filmstrip, or as tabs.

17) COLOR CODING

Organize your worksheets and dashboards into different sections by color coding the menu bar tabs.

18) HIDE SHEETS

Right click on a dashboard and select hide all sheets to nest all associated worksheets beneath the dashboard.

19) DUPLICATE VS. COPY

Duplicating a dashboard creates a new dashboard with the same worksheets. Copying also makes new sheets.

20) COPY BETWEEN WORKBOOKS

Copying and pasting a worksheet or dashboard into a new workbook will bring the data source along too.

21) NAMING CONVENTIONS

Establish easy to use conventions when naming your sheets and dashboards to stay organized.

WORKSHEET WORKSPACE

Maximize your efficiency and layout your workspace however works best for you.

22) MOVING CARDS

All of the cards on the worksheet workspace can be shown, hidden, or moved to another location.

23) CAPTION

Show the caption to display filter selections, when the data was refreshed, or gather your own notes.

24) SHOW FILTER

Use the show filter option to simultaneously add the pill to the filters card and also show the filter card.

25) SUMMARY STATS

Reference the bottom left corner to double check that the number of marks or totals in your viz make sense.

26) MARK CARD ORDER

The order of the pills on the marks card can affect how the visualization renders.

EXPORTING

Extract the pieces out of Tableau as you need them in other formats.

27) VIEW DATA

Right click on any mark to view and export the underlying data.

28) EXPORT IMAGE

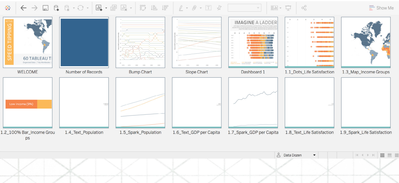
Export an image of a worksheet or dashboard to share with colleagues or embed in emails about the work.

29) TWB VS. TWBX

A file saved as .twb points at a data source while a .twbx has the data packaged up with the Tableau file.

30) EXPORT AS VERSION

Export your workbook to a different version of Tableau than the one you built it with to share with colleagues.



BEAUTIFUL VISUALIZATIONS

BUILDING SHORTCUTS

Work quickly with these short cuts and hidden buttons.

31) SHOW ME PANEL

Hide the show me panel and learn how to build each visualization from scratch. It will be faster in the long run.

32) OPTION OR ALT

Hold down option on a mac or alt on pc as you drag out a pill to choose your date format or measure aggregation.

33) ASSIGN PALETTE

Assign an entire color palette at once with the assign palette button.

34) HEX CODES

Pick the exact color you want with a hex code or dropper by double clicking an item's individual color box.

35) REVERSE AXIS

Flip an axis by right clicking on it, selecting edit axis, and then reverse axis.

36) NULL INDICATOR

When the null indicator shows up in the bottom right corner of a visualization, make sure you understand why.

37) SHOW FILTER FROM SHELVES

Show a filter for any variable on any shelf in your visualization, even if you've added quick table calculations.

LABELS

Give your audience all the context they need and remove the clutter they don't.

38) DUPLICATE PILLS

Hold down command to duplicate a pill and add it to other areas of the visualization, like labels or tooltips.

39) ALLOW LABELS TO OVERLAP

Check this box to allow labels to overlap with each other and the visualization.

40) MOST RECENT

Limit the number of labels to just the ones that matter most, like the maximum, minimum, or most recent mark.

41) FIX AXIS

Edit any axis and fix the start or end of the scale while allowing the other one to remain automatic.

42) LINES VS. BORDER

Eliminate any auto generated borders (around your viz) or lines (in your viz) that clutter your final visualization.

TOOLTIPS

Take the time to fully leverage one of Tableau's most powerful features.

43) SHOW YOUR WORK

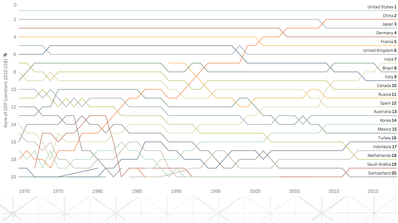
Include a calculation's underlying variables in the tooltip so the audience can better understand your work.

44) EXCLUDE COMMAND BUTTONS

Unless you intend to have your audience use this tooltip feature, uncheck "include the command buttons".

45) DUPLICATE DRAFTING

Save visualizations you love while testing new ideas by duplicating the worksheet. Just finish your tooltips first.



FLEXIBLE DASHBOARDS

DASHBOARD SIZE

Create flexible dashboard sizes that will fit their final destination.

46) RANGE SIZE

Allow your dashboard to adjust to the dimensions of different screens by setting the dashboard size to a range.

47) TABLEAU SERVER

Remember the extra space that Tableau Server's framing takes up when you start drafting your final dashboard.

48) DESKTOP VS. LAPTOP

Test your dashboard sizing on a larger desktop screen and smaller laptop screen to see how it adjusts.

CONTAINERS

Keep your dashboard organized by using tiled objects inside containers.

49) TILED VS. FLOATING

Tiled objects are fixed into a grid with all the other dashboard objects while floating objects are independent.

50) SHOW / HIDE CONTAINERS

Make a floating container hide or appear by showing a button to open and close it.

51) DOUBLE CLICK THE FRAME

Double click the frame handle of any container to jump up a level to the next container holding it.

52) BLANK CONTAINERS

Place two blank containers in a new horizontal or vertical container to make it easier to work with.

53) DISTRIBUTE CONTENTS EVENLY

Make a vertical or horizontal container to give each object it contains the same amount of space.

54) FIX HEIGHT OR WIDTH

As you build out a flexible dashboard size, fix the height or width of the objects that need to stay the same size.

LAYOUT TAB

Tweak the features of every object on your dashboard until it's just right.

55) X + Y & W + H

Set objects to the exact location on the dashboard using the x and y coordinates and their size with w and h boxes.

56) BACKGROUND COLOR

Change the background of any dashboard object with the background color circle that defaults to none.

57) OUTER PADDING

Create space between the dashboard objects by setting the outer padding.

58) INNER PADDING

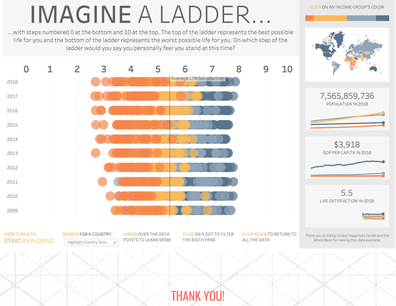
Allow the content in an object, like text, to breathe by using inner padding.

59) NAME OBJECTS

Make objects easier to find by naming them in your dashboard's item hierarchy.

60) ITEM HIERARCHY

Double check that you don't have extra containers in your dashboard by clicking through the item hierarchy.



THANK YOU!

CLICK HERE TO CHECK OUT THE FULL TALK

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