



Free Training Transcript:
Interacting with Content
in the Mobile App

Welcome to this Tableau Mobile video. Tableau Mobile is the best way to interact with your data anywhere. For information on navigating the app, please check out the preceding video. To follow along, you'll need access to a Tableau Online or Tableau Server site as well as the mobile app.

You've found that data you needed – now what? How we interact with a viz will vary based on the type of content we're looking at.

Working with Marks

For a simple interaction, tap on a mark to select it. This will highlight the mark and bring up a tooltip with more information. And we can clear the selection. To select a group of marks, tap and hold to drag the rectangular selector to include the desired marks. A view can be reverted to its original state by using the revert icon at the top.

Many views and dashboards include filters. Tap a filter to bring it up in a larger format and select the desired filter option. Filters can be cleared by touching the clear filter icon at the top. Tap outside the filter to close it.

Sheets and Workbooks

Let's back out to the All area for a moment and filter to workbooks only. Tapping on a workbook will either bring up a tabbed view, if it was published to show sheets as tabs, or tap this chart icon, here in the upper right corner, to show a list of the available sheets in that workbook. If this icon is greyed out, you're on a view, not a workbook.

Maps

On a map, there are several map-specific options. Swipe out with two fingers to zoom in, pinch to zoom out. To pan, two-finger tap and drag the map. We can also search geographically.

If we want to select a group of marks, we can tap to get the map toolbar, and choose our preferred method of selection, such as radial select or lasso, then tap and drag to set that selection. To go back to pan and zoom, tap to open the toolbar menu and select the pan icon. To go back to the original orientation of the map, use the home icon in the toolbar.

Custom Views

But let's say that we want to keep those adjustments we made to the map. If we want to save this state of the viz to come back to later, we can save a custom view by tapping here, where it says Original View, and creating a view. Tap to open the same menu to toggle between the original view, other saved views, or create a new view. Custom views can be shared with others by selecting Manage and tapping the eye icon. Your view is now available to anyone with access to that content. Similarly, custom views built by others may be available in this menu.

Editing a View

If we want to ask additional questions, we may have the option to edit the view, depending on the permissions on the content. To edit a view, tap the edit button on the toolbar. We can edit an existing view or even build a new one. I want to access the hourly sheet from this dashboard.

We're brought to a Tableau Desktop-like experience where we have access to the underlying fields in the data as well as the canvas for building our view. We can even create or edit calculations. Tap on the drop down arrow next to the dimensions or double tap it. I'll create a field for Time of Day. And then I can bring this field to the filter shelf with a simple drag and drop.

If we want to see our view in greater detail, we can collapse the panes by tapping the canvas. We still have basic information conveyed in the icons, and to access the underlying panes again, simply tap to reopen them. We can either save this new view, or if we have the rights, potentially save over the old view.

Sharing views is as easy as copying the link from the share menu.

Conclusion

Thank you for watching this mobile training video. We invite you to continue with the Free Training Videos to learn more about using Tableau.