Free Training Transcript: Interacting with Content

Welcome to this video on Interacting with Content on Tableau Server and Tableau Online.

If you have access to a Tableau site, you can log in and follow along. Keep in mind that you will see your own content, not what's on my screen, and some of the options I have may not appear for you.

To learn about navigating the interface, check out the previous video on getting started.

Interactions

Here is a dashboard that has already been published. We can interact with the information that's on this report, including using filters that the author has set up for us.

Filters may appear in a number of formats. Region, here, is a single select filter. We can go back to the default by using the "Show all" button. The Country filter is a dropdown, and also a multi-select filter. It also asks us to apply the filter before the view is updated.

State is a wildcard match filter, we simply type in a value to filter the view. Note that it's possible to filter so the view becomes empty. Simply use the revert button in the toolbar and the data will come back as it was at the beginning—you can't break this.

Finally, the profit filter is a slider, that also allows us to type in, and the order date filter allows us to set a relative date.

Hovering over marks in the view may bring up a tooltip with additional information. If we click on a mark, note that the views below update to reflect the values relevant to just that mark.

We can use the toolbar present in the map to do things like zoom, pan, or select marks in a variety of ways, such as lassoing. Remember that the original is always there after any explorations—just use the revert button.

Note that the interactions of marks on your content may be different—see what happens when you click or hover in various places, including the marks in the view, and things likr legends and filters.

Discussions

We may have the ability to add comments on a specific view. Snapshots can be added to the discussion, which will let others jump right into to what we're commenting on.

Custom Views

We may also be able to access custom views of the dashboard. Views, like those shapshots, are saved combinations of filters, selections, highlighting, etc. If there are alternate views, a "View" option will appear in the toolbar. We can toggle between views easily.

Download & Export

Depending on your permissions, it might be possible to download an image, the summary data for the marks in the view, or a PDF version of the content.

Subscriptions

We know this dashboard is updated frequently, and we want to stay on top of the changes. We can set up a subscription to this content by clicking the envelope icon. This will send regular emails of the content.

The email will contain a static image of the workbook at that time, and a link to the live version.

Favorites

Finally, if this content is something we want to be able to come back to easily and often, we can click this star to make it a favorite.

All our favorites appear in the favorites menu at the upper right.

Conclusion

Thank you for watching this video on Interacting with content on a Tableau Site. We invite you to continue with the free training videos to learn more about using Tableau.