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Free Training Transcript:  
Tableau on the Phone

Welcome to this video on Tableau Mobile for the Phone. For information on using the app on tablets, please check out the other Tableau Mobile videos. To follow along, you'll need access to a Tableau Online or Tableau Server site as well as a Phone with the mobile app.

So you've got the app. You're logged into your site. Now what?

## Basic Navigation

We're currently on the Favorites tab but we can also easily navigate to Recents or All. Recent is exactly what it sounds like – it shows the last 12 pieces of content we accessed. Tapping All brings up all the content we have access to. I'll switch to landscape mode to maximize screen real-estate for the purposes of this video.

## Viewing Content

A quick word about content – by default, tabs show both workbooks AND individual sheets. We can identify what's a single sheet because the thumbnail is a box. A workbook has the stacked thumbnail.

To change what type of content is displayed, tap Filter, then Format, choose the desired type of content. We could also filter by owner, project, or tags.

## Searching

It's important to be able to find the right data easily. Tap in the search box and start typing – the results are dynamic and update as we enter more of the search term. If we don't see the expected content, check if there are filters applied.

## Favorites and Snapshots

If there are certain pieces of content we know we'll want to stay on top of often, we can add them to our favorites by tapping on this star here. Favorites are powerful – not only are they all in one place for quick and easy access, favorites have snapshot capabilities for offline viewing.

A snapshot is a high resolution image of the viz. They're stored securely and available offline. We can see the last refresh time so we always know how up-to-date our data is. When we tap on a favorite, we can toggle between the image snapshot and the live interactive view. Now we can do things like change filters and get tooltips.

## Working with Marks

If we're on a live view, we can interact with the content. For a simple interaction, tap on a mark to select it. This will highlight the mark and bring up a tooltip with more information. Tap again to deselect. To select a group of marks, tap and hold to drag the rectangular selector to include the desired marks.

Many views and dashboards include filters. Tap a filter to bring it up in a larger format and select the desired filter option. Tap outside the filter to close it. A view can be reverted to its original state by using the revert icon at the top.

Sharing views or subscribing is easy to do right from the toolbar.

## Conclusion

Thank you for watching this video on Tableau Mobile on the phone.