Filters, Dashboards and Actions

João Moura Pires

Notice

- **Author**
  - **João Moura Pires (jmp@fct.unl.pt)**

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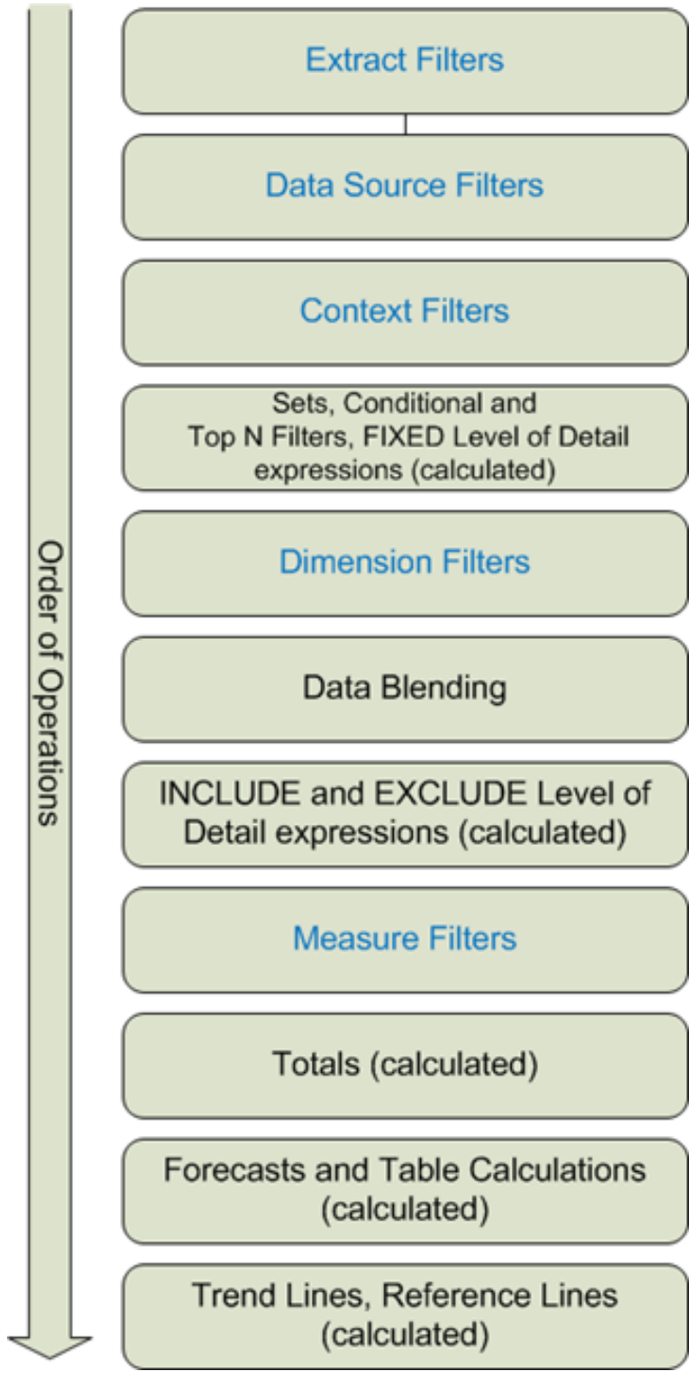
- **Sorting data**
- **Dashboards**

Order of operations

Order of operations



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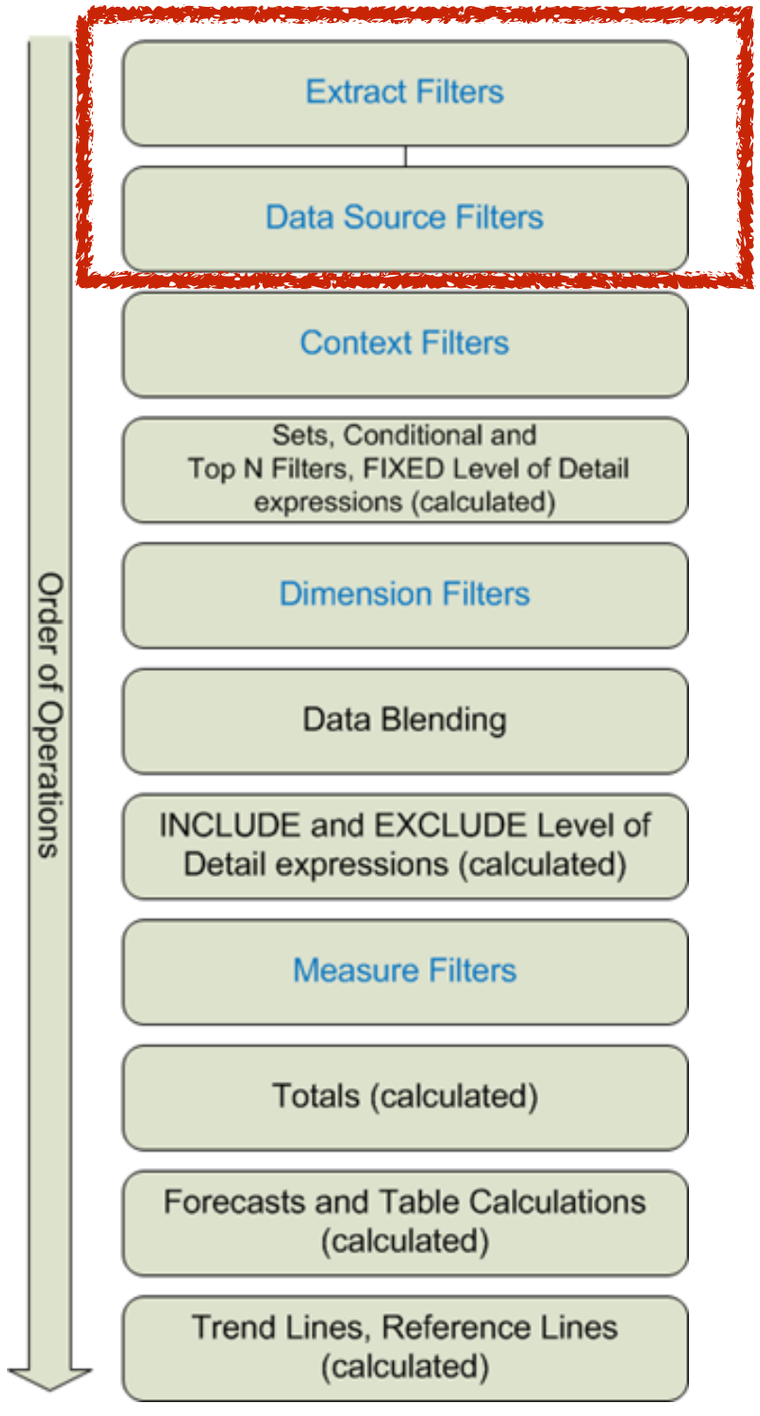

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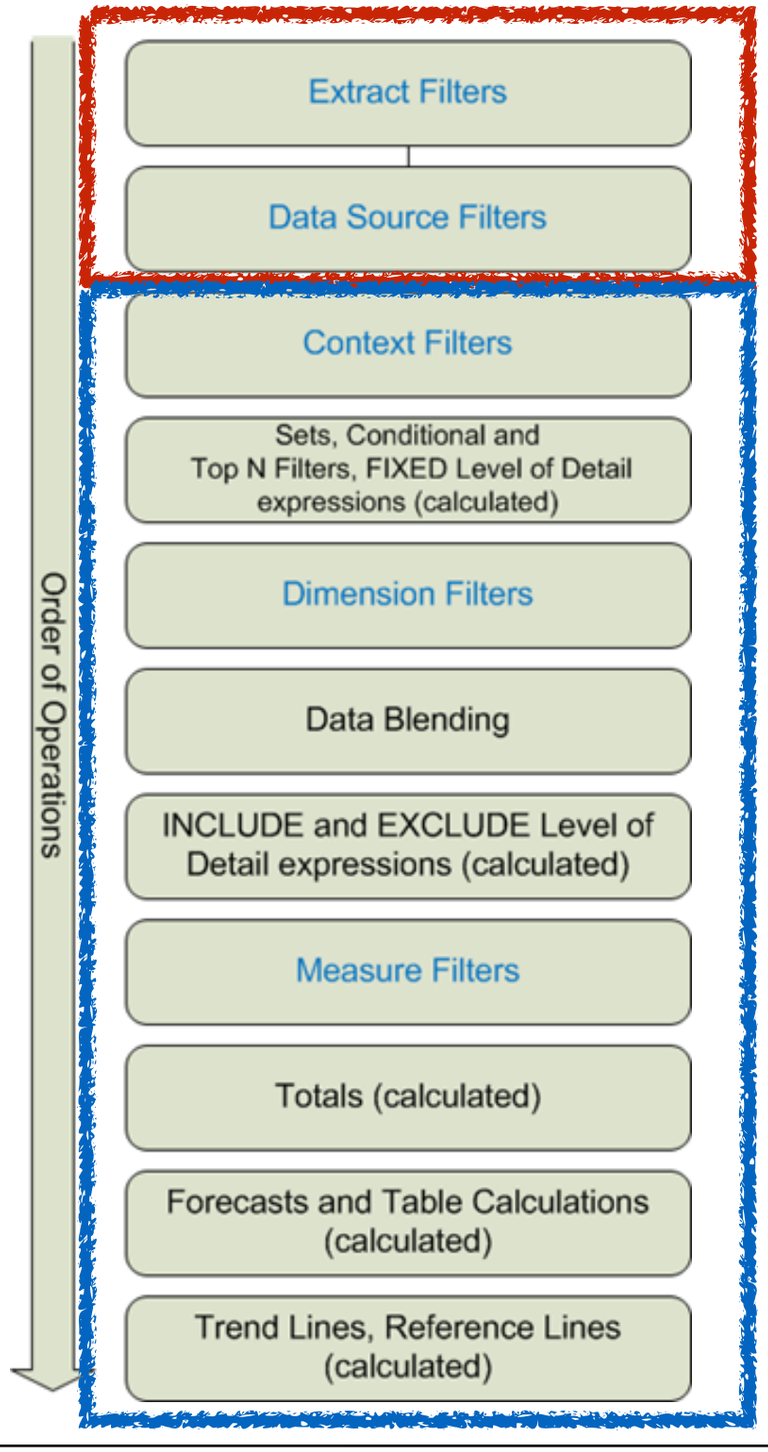

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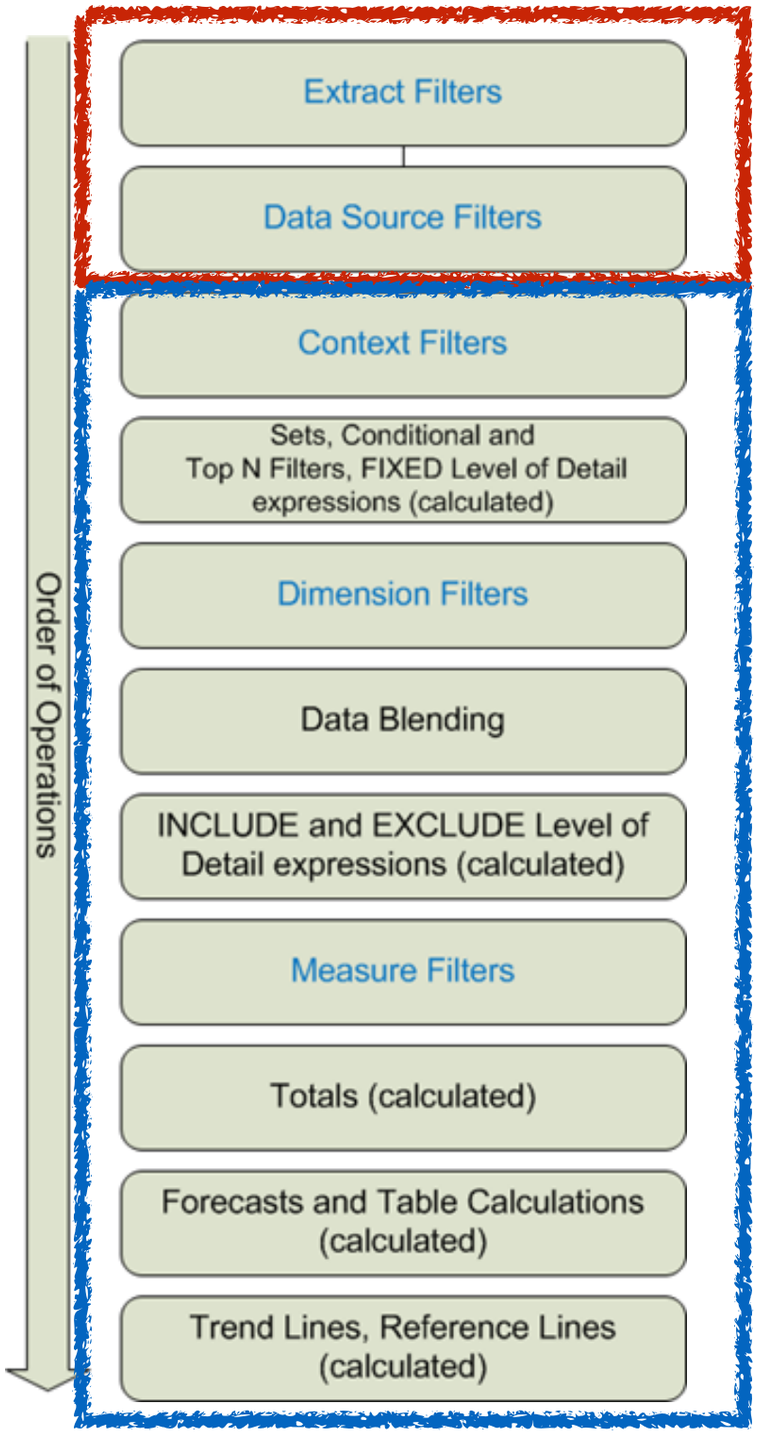
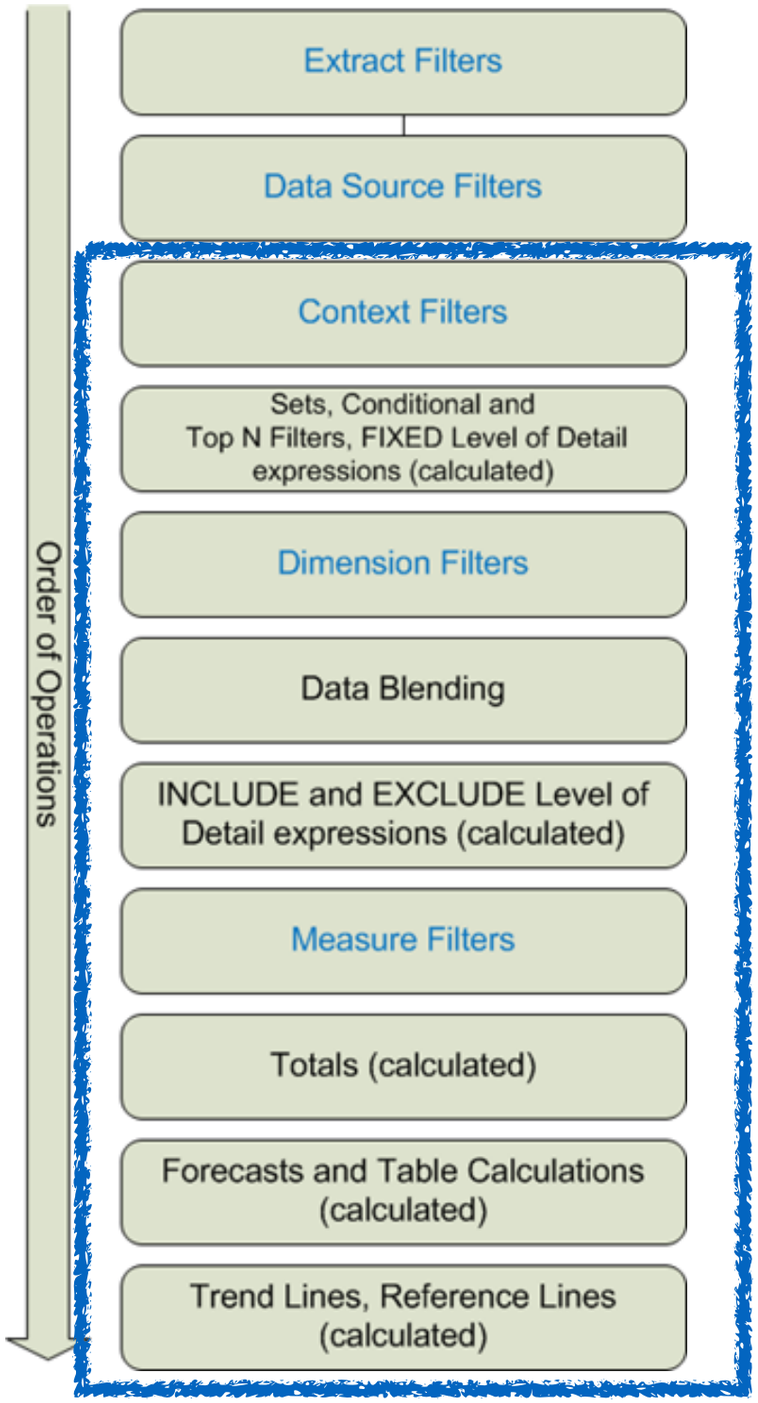


Data blending is one way of combining data from multiple data sources into a single view. Instead of joining the data at the row level like a cross-database join, data blending sends separate queries to the separate data sources and aggregates the results to a common level back in Tableau

Order of operations



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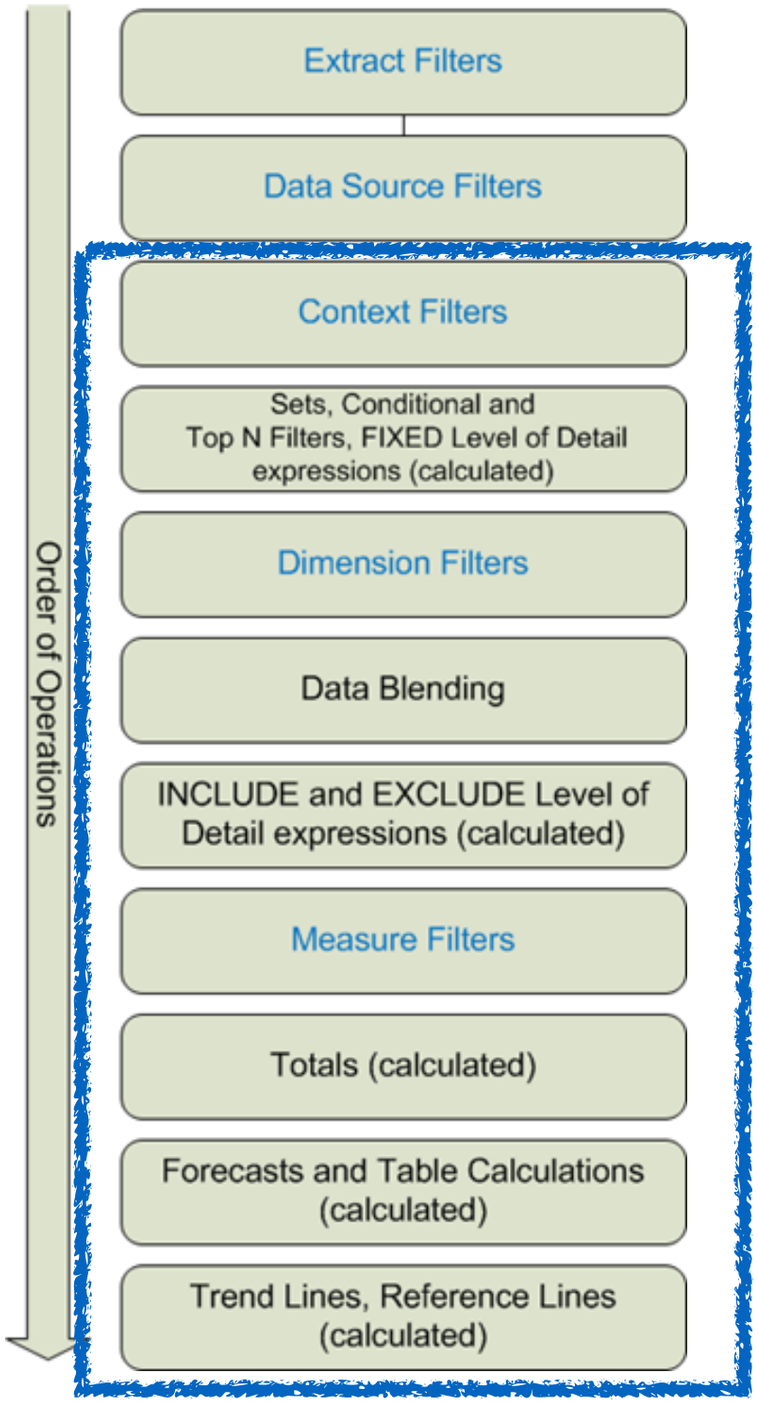
All filters are independent !



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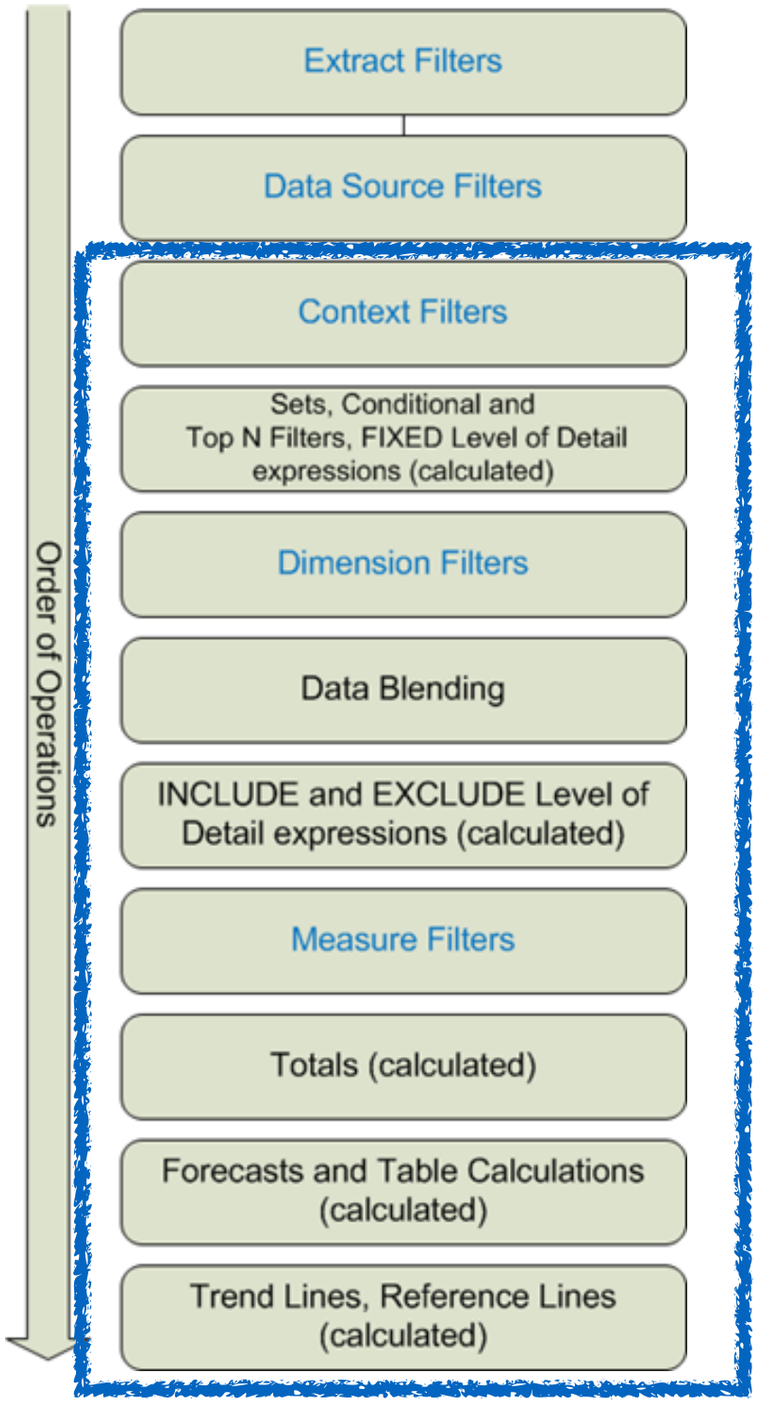

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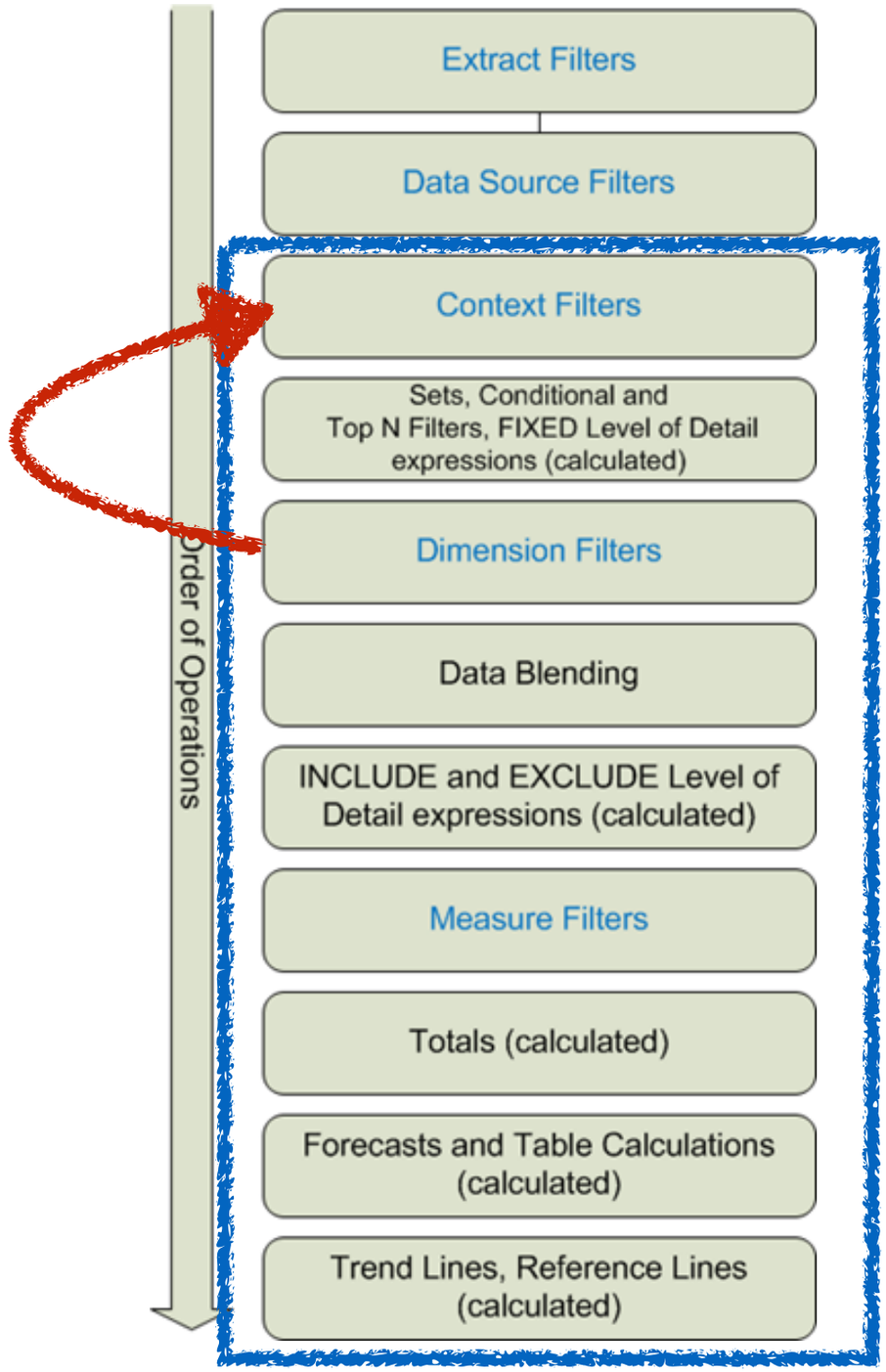
We can move some **dimension filters** to **context filters**



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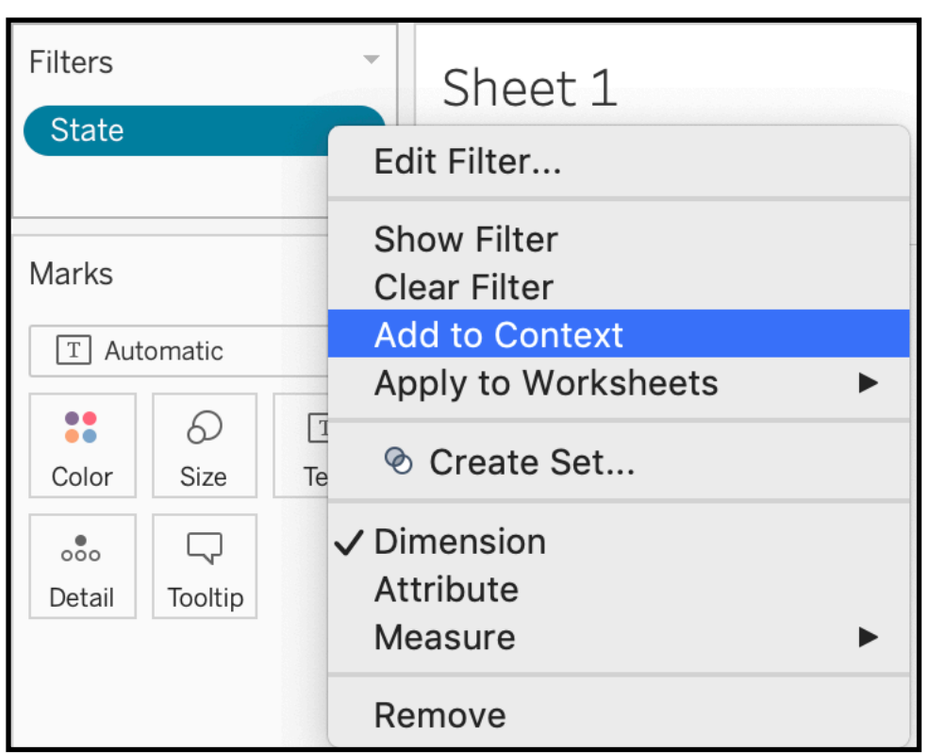

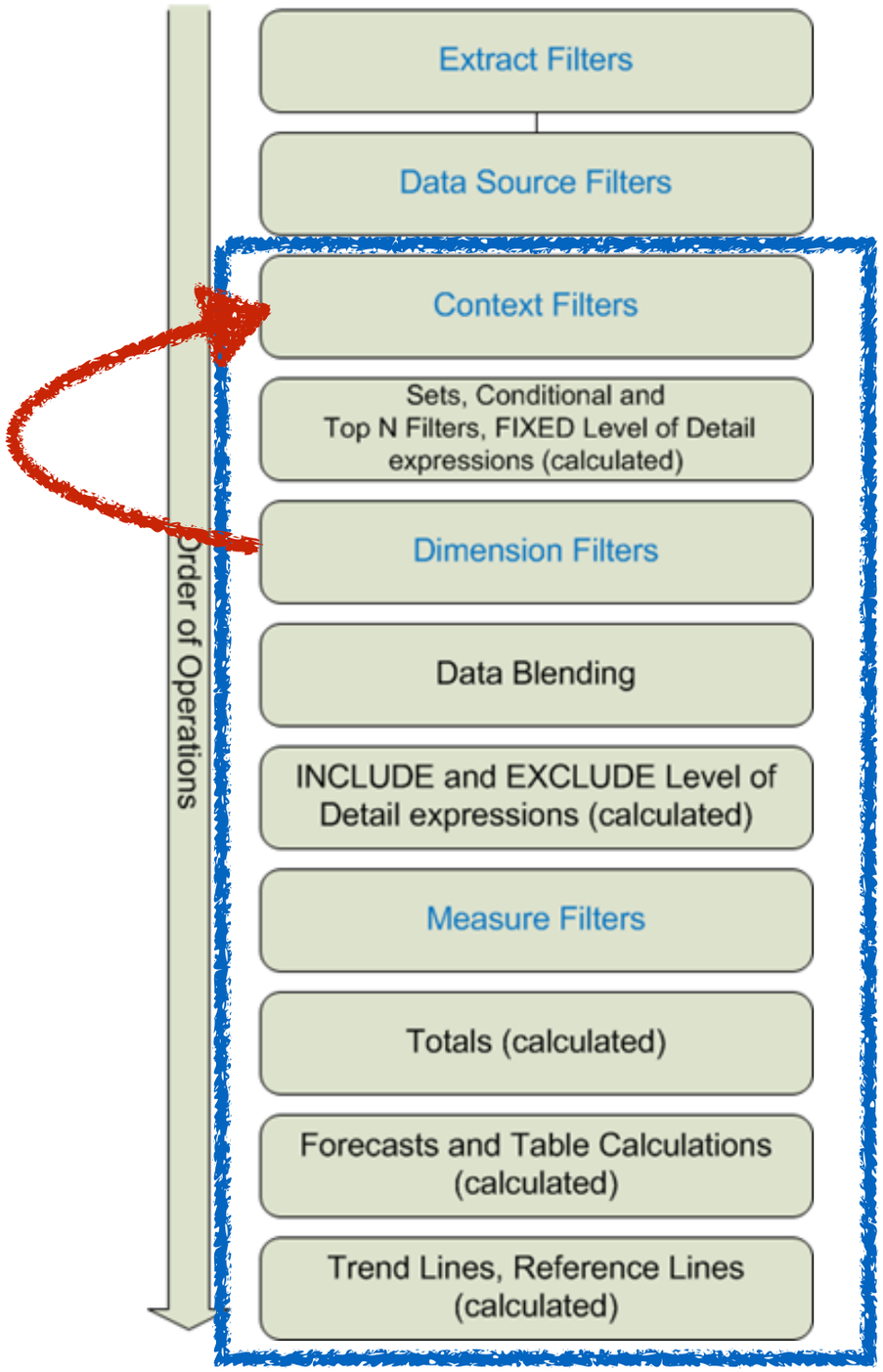

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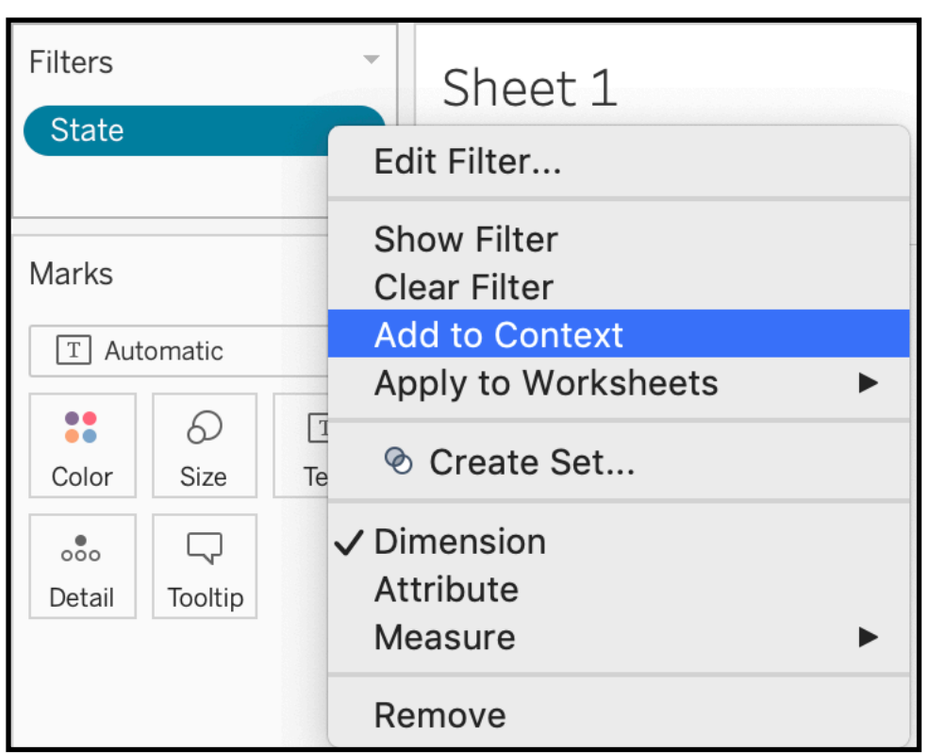

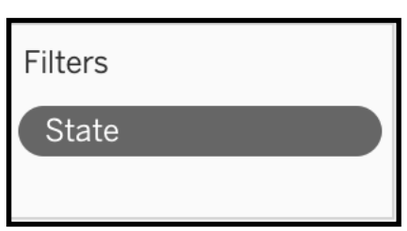

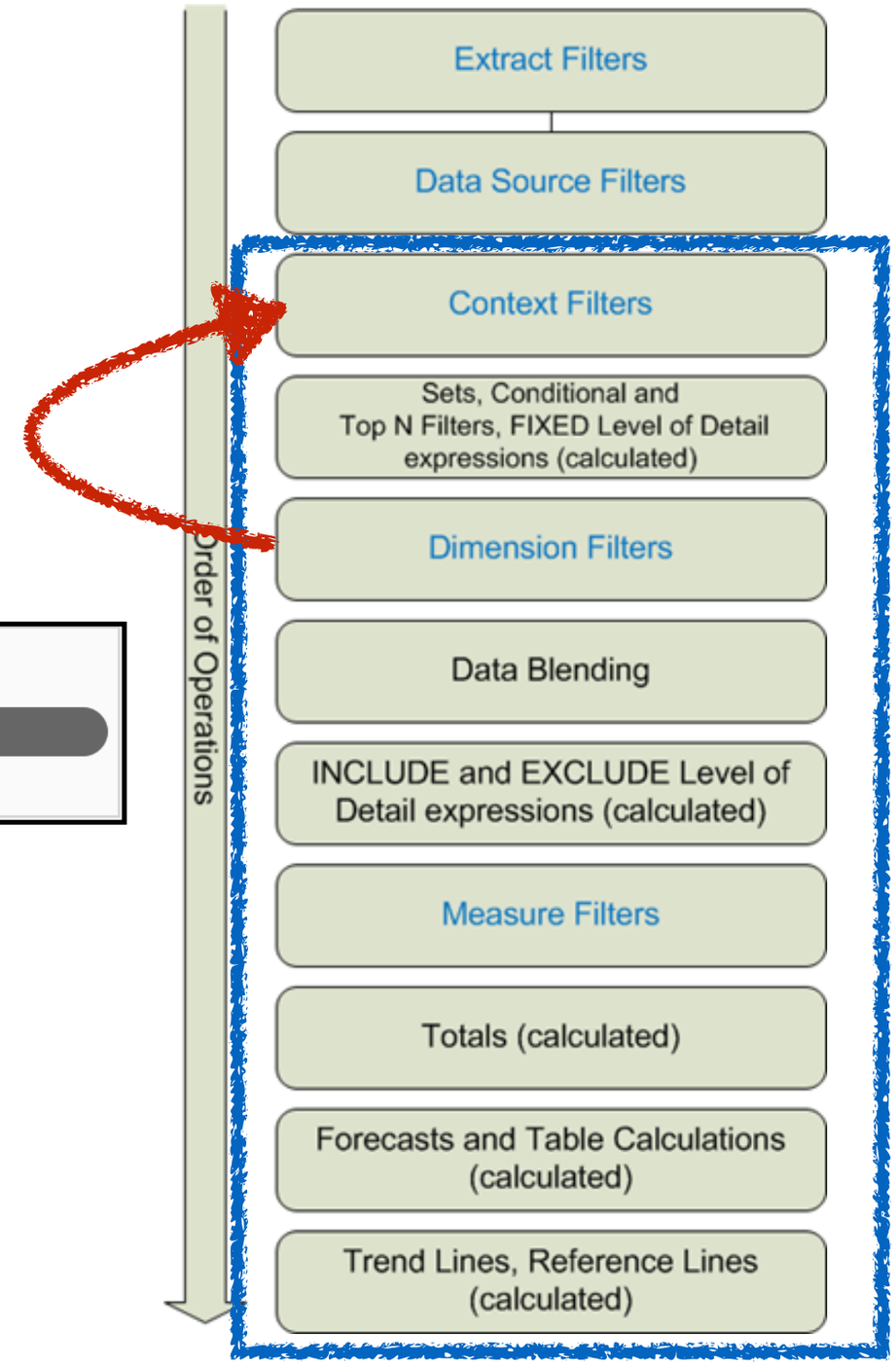

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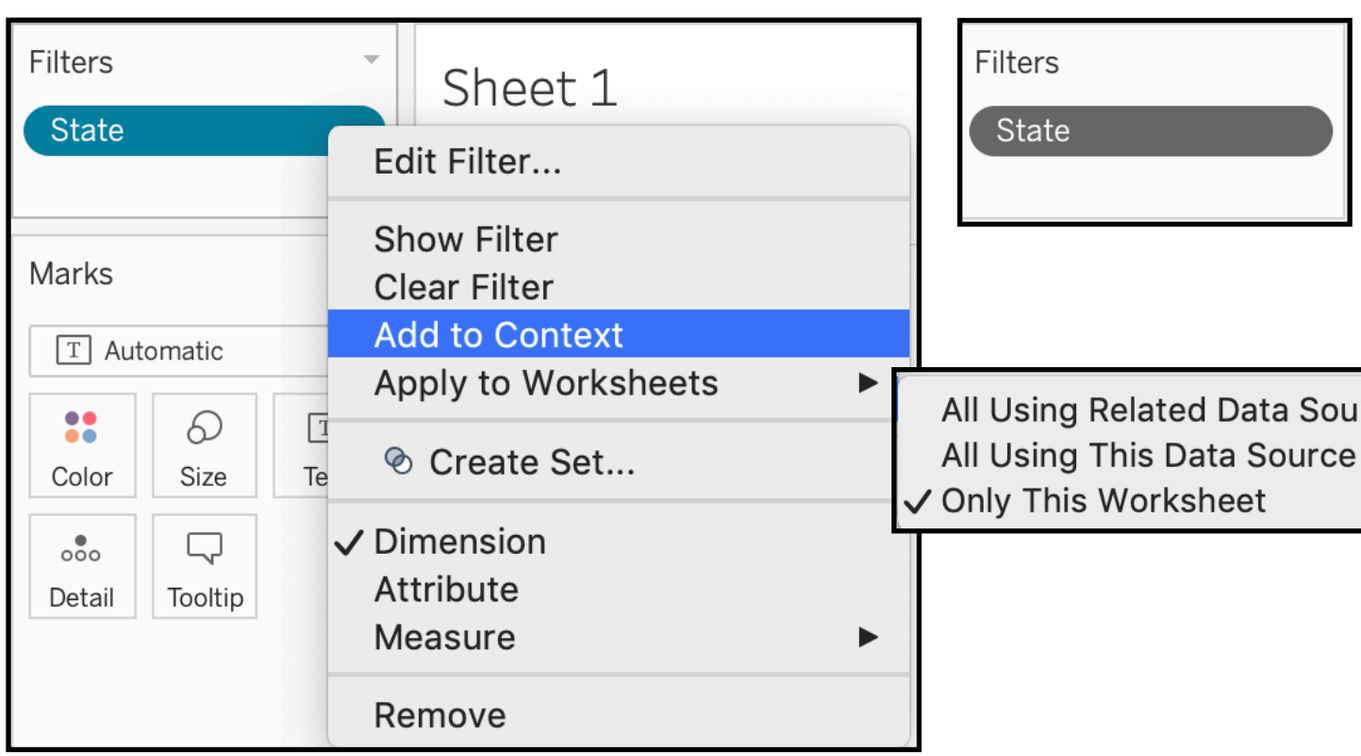
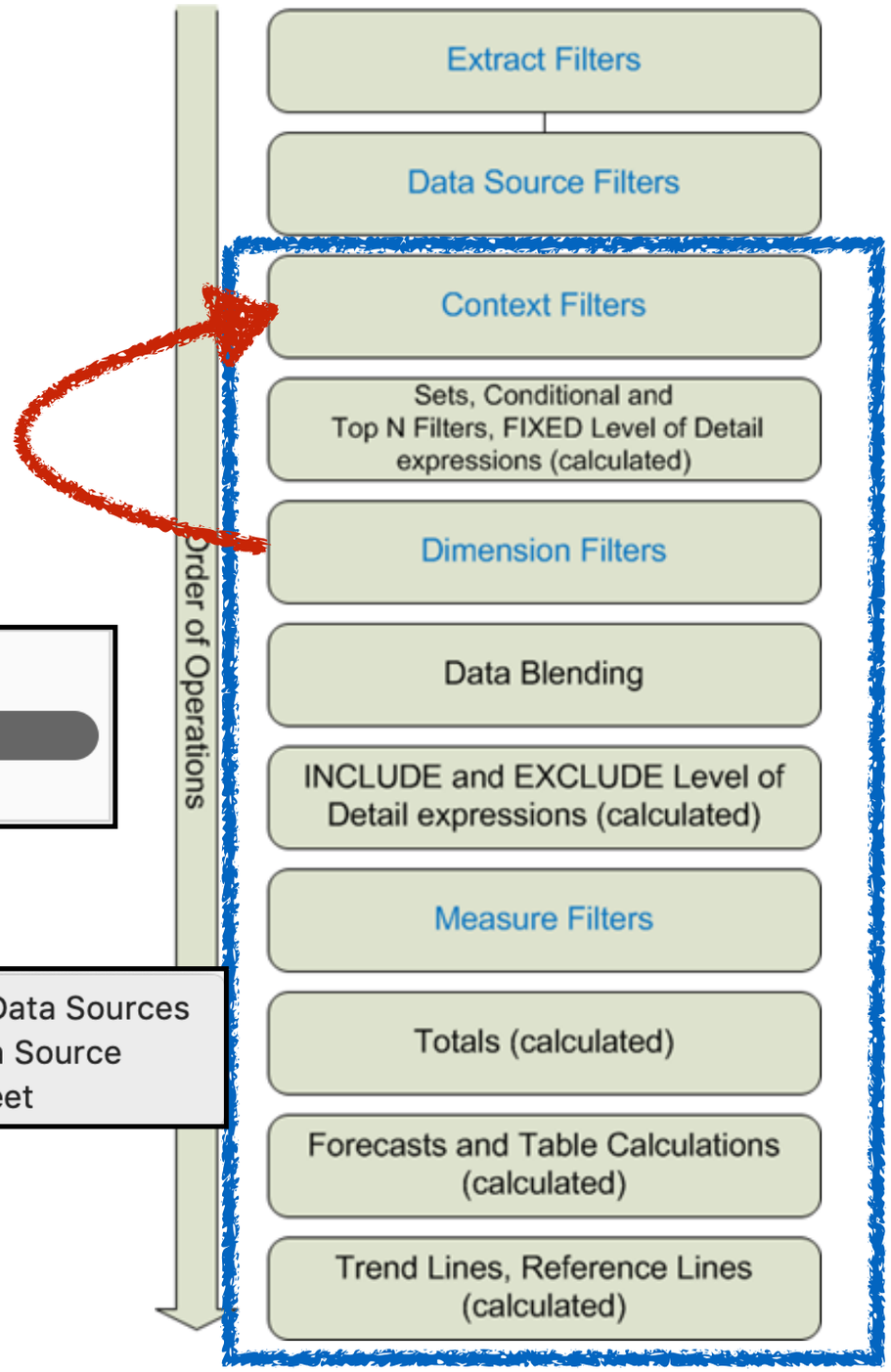
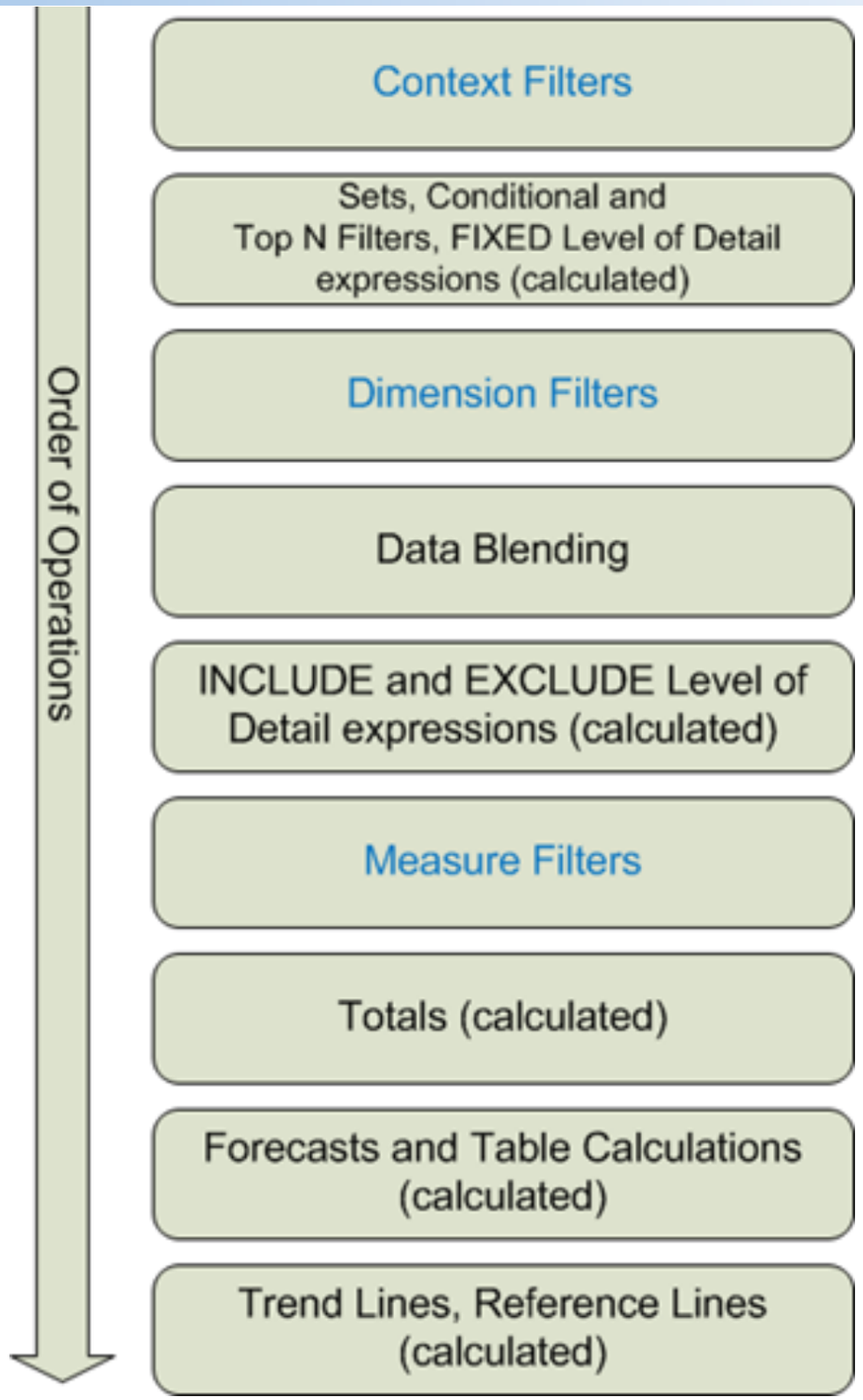




Order of operations

Who are the top 10 customers, by total sales, in New York City?

What is the percent of total sales by product sub-category?



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It is important to set the desired calculations at the correct level !

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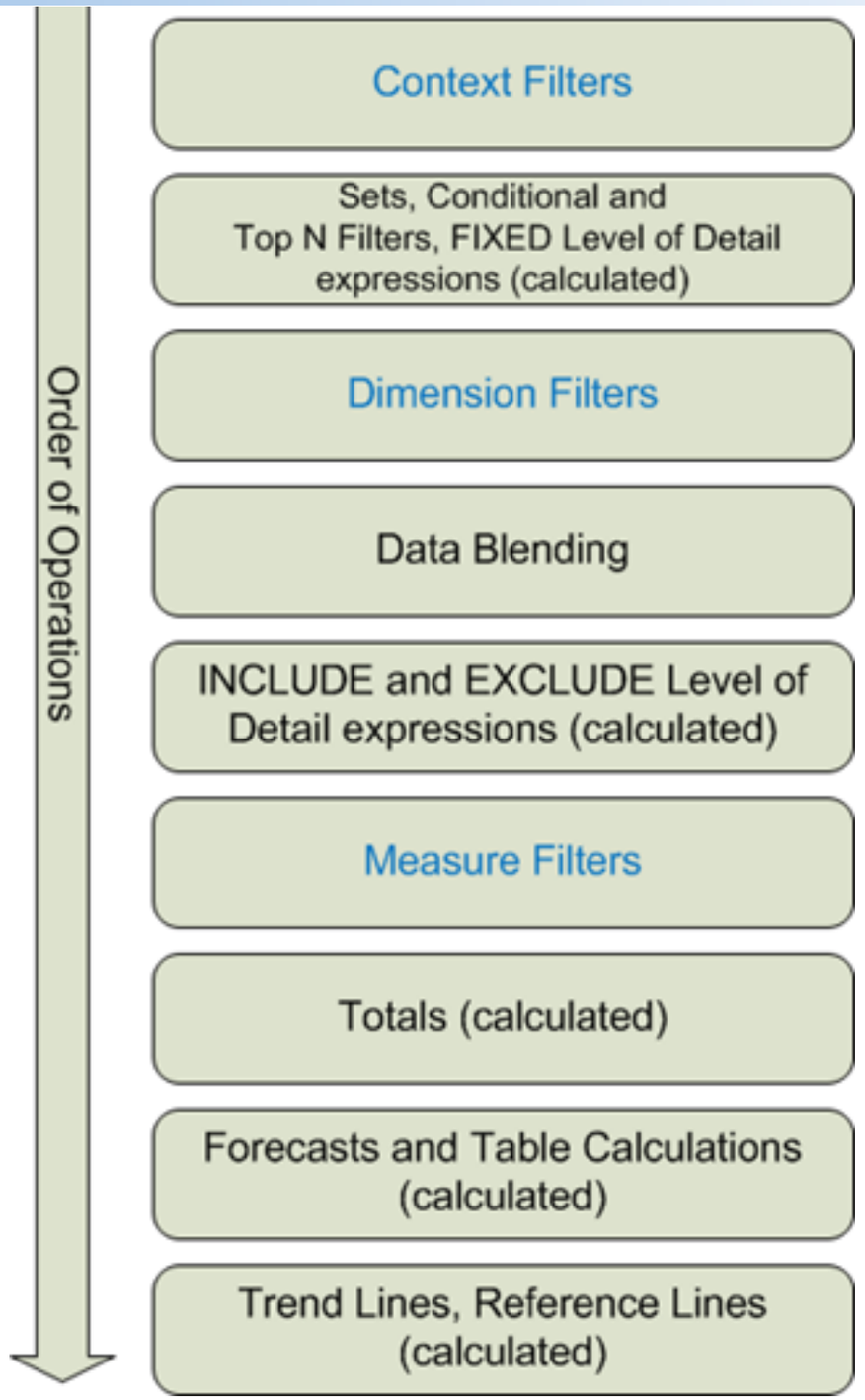

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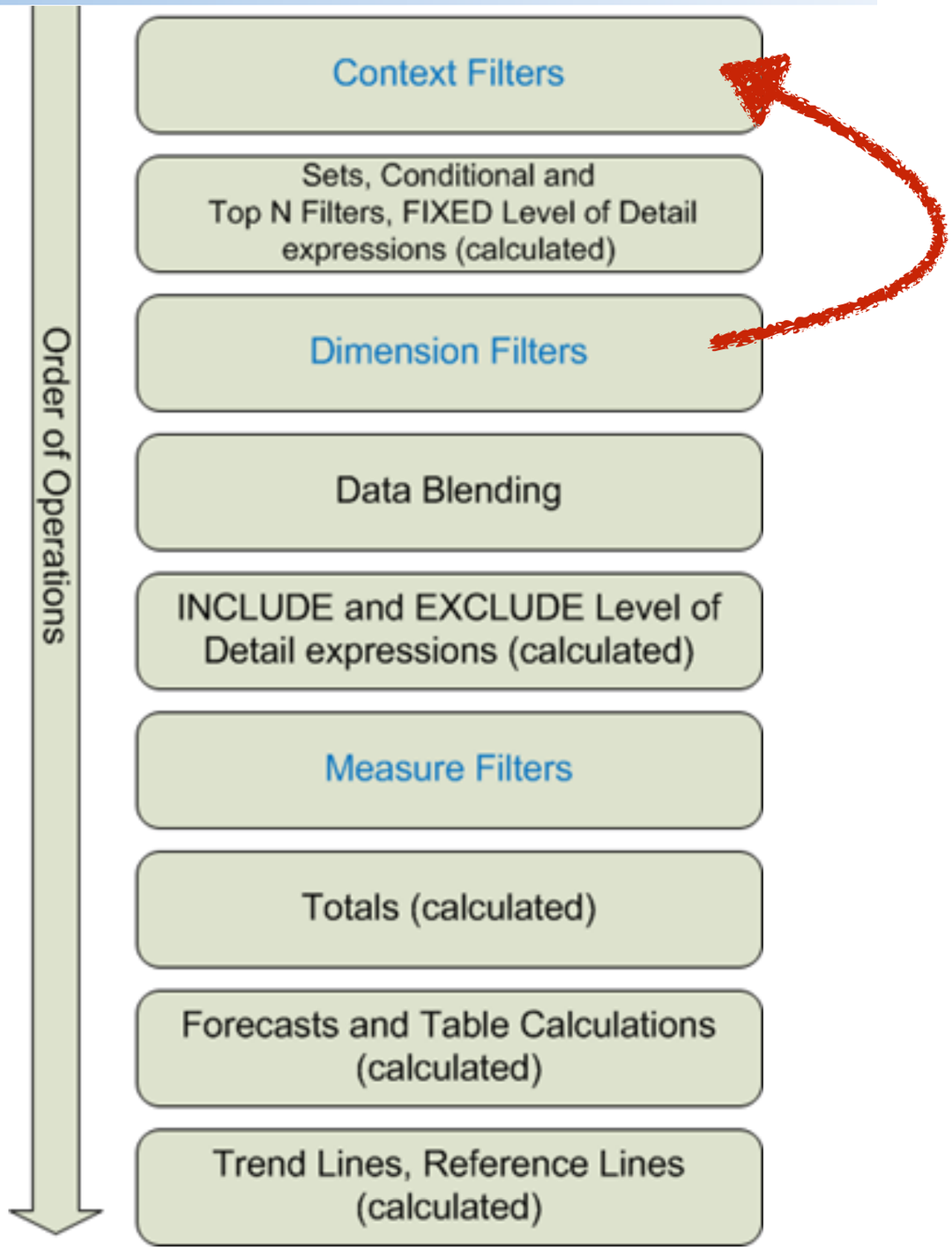

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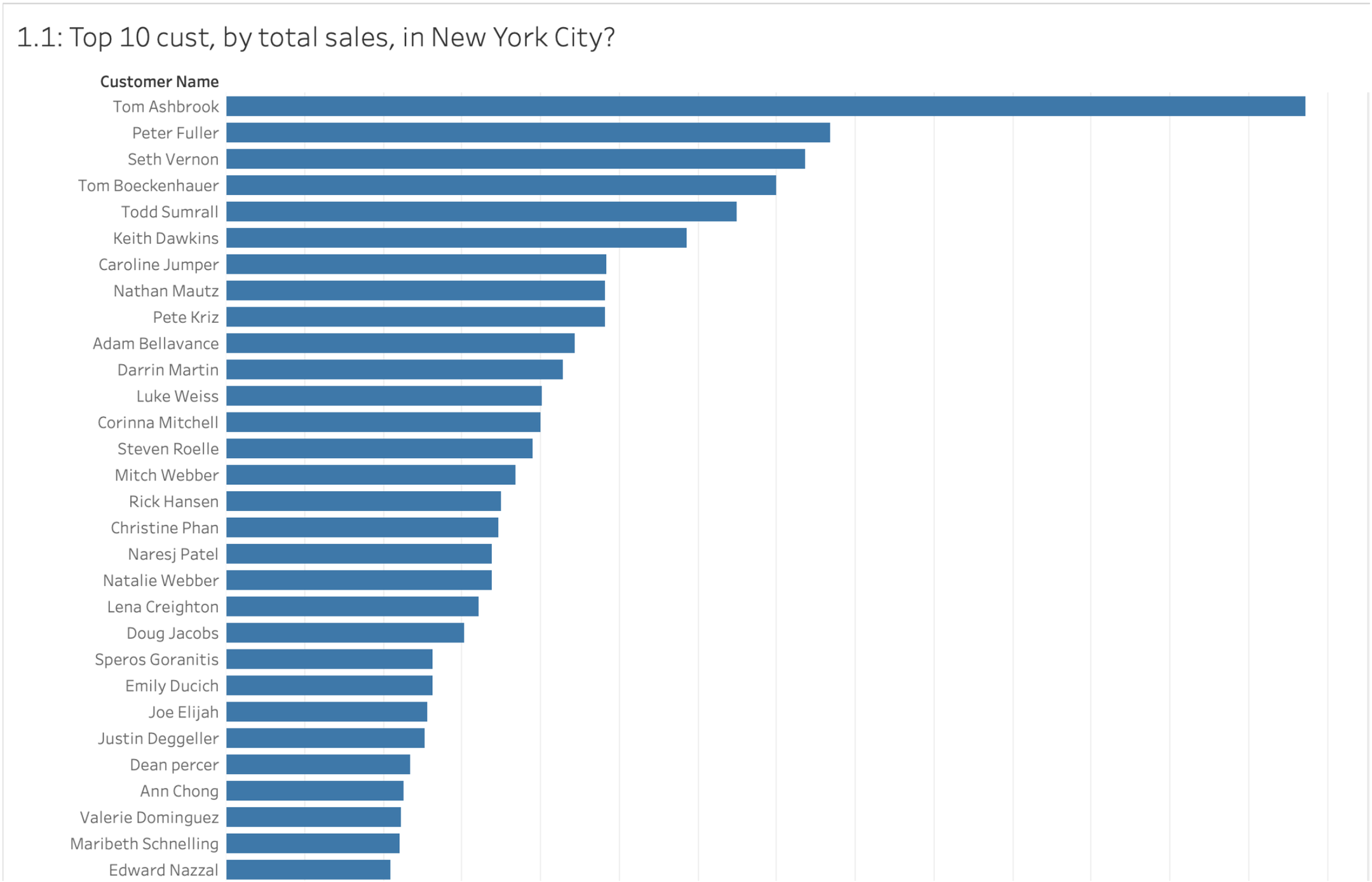

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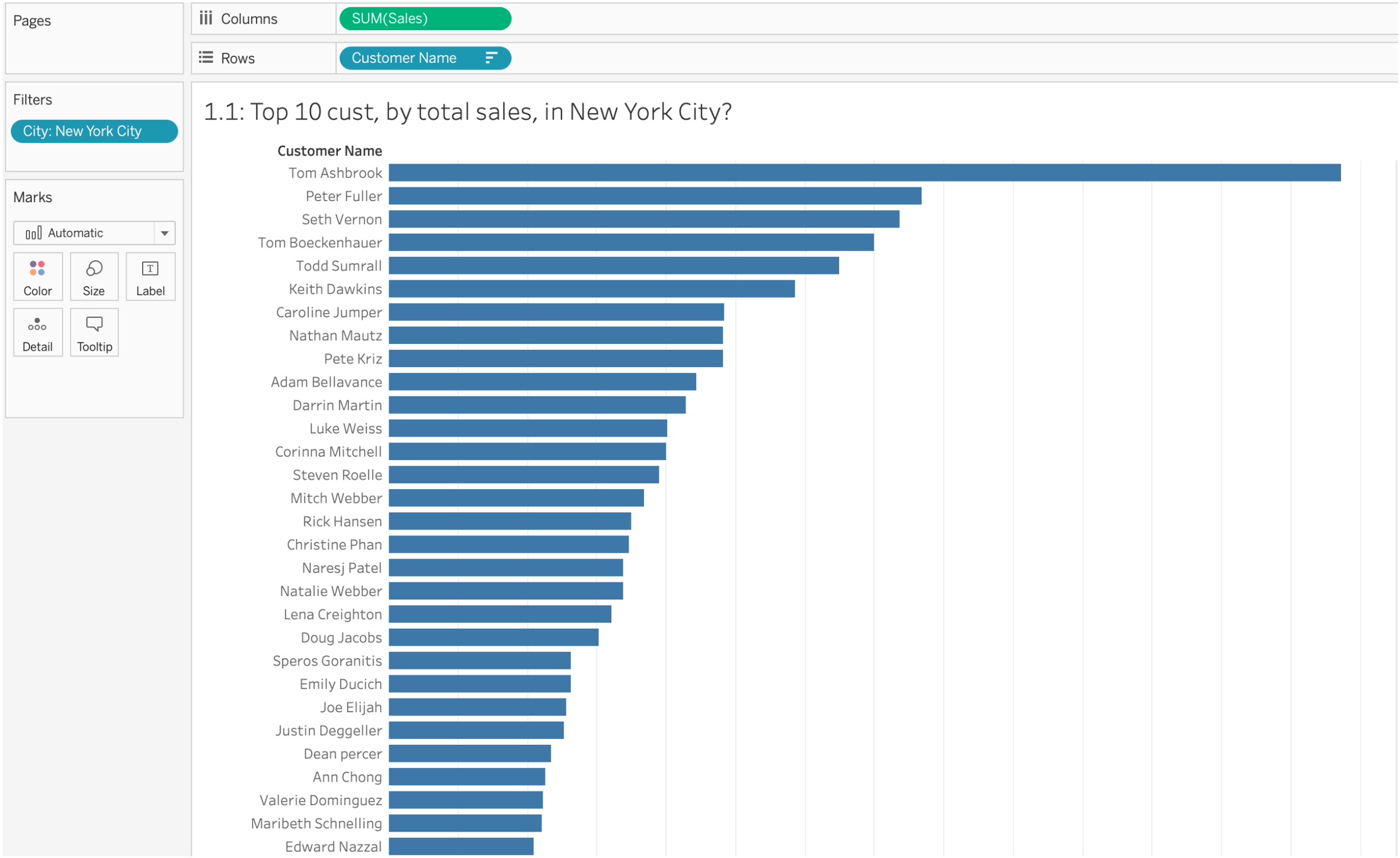

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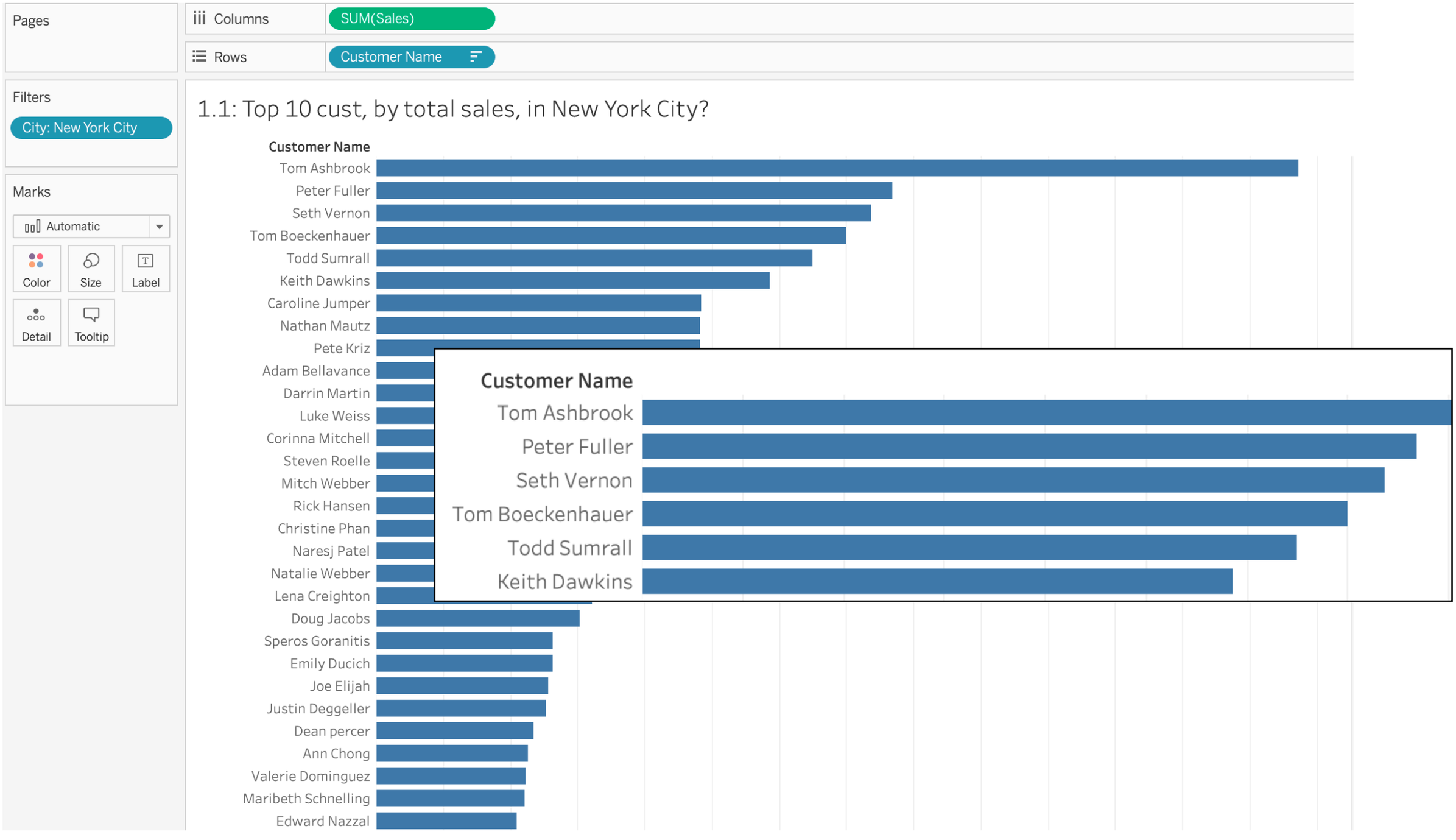

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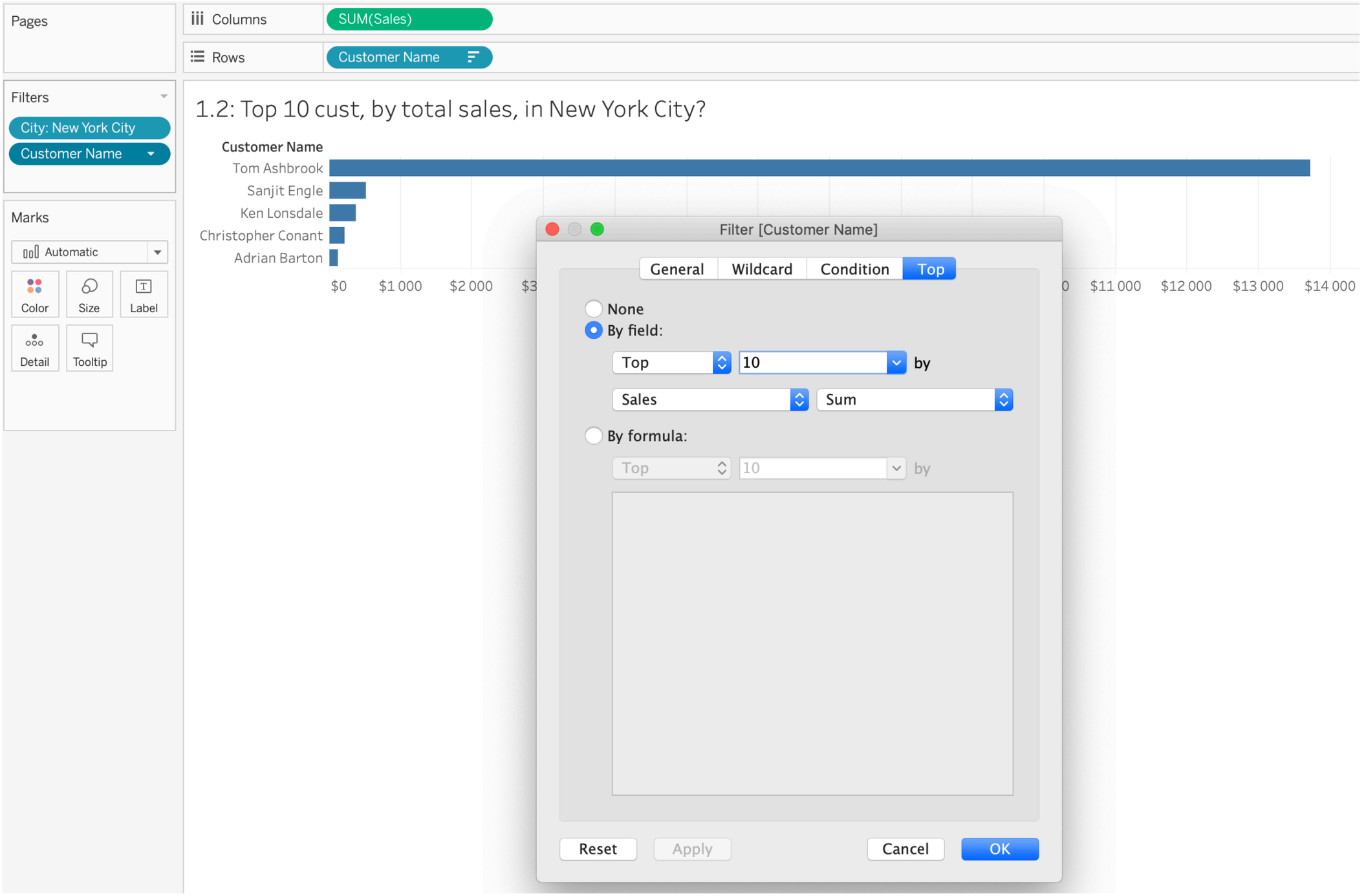

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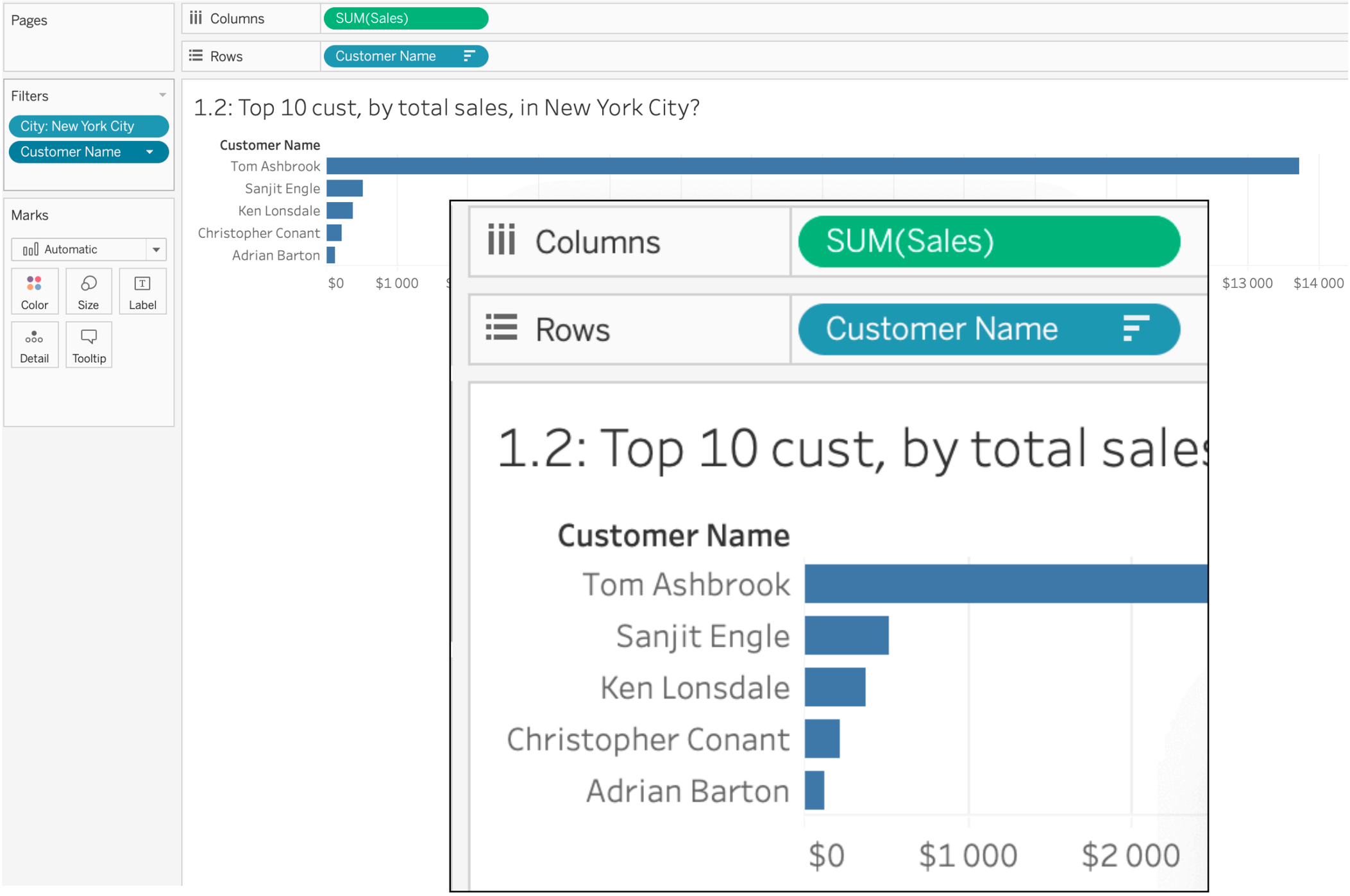

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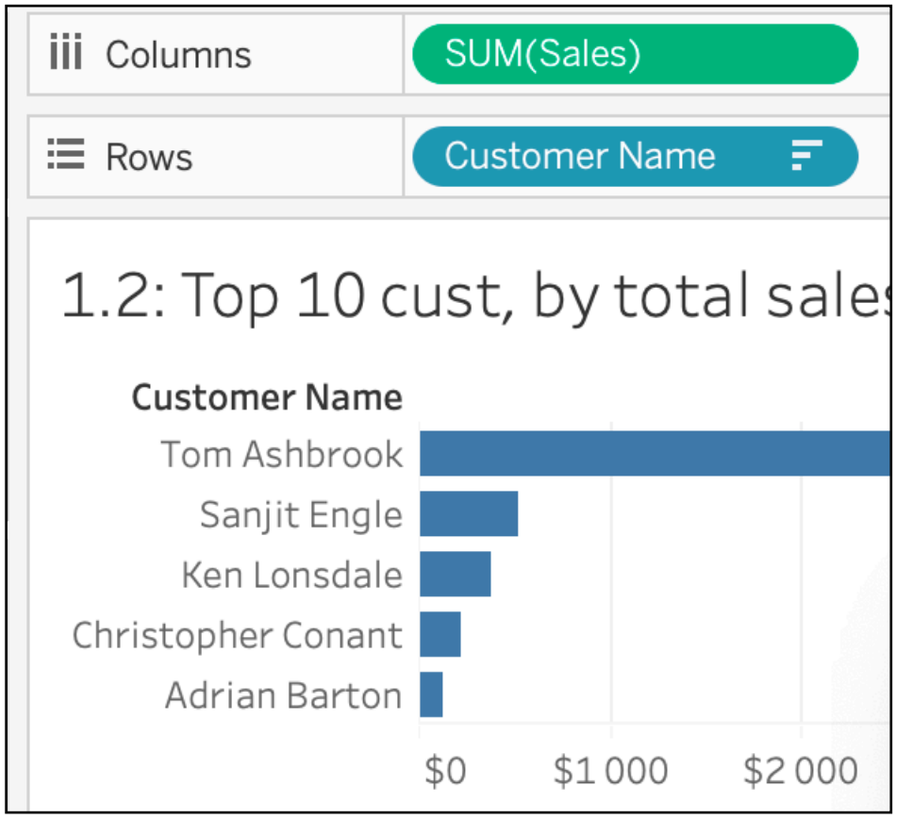
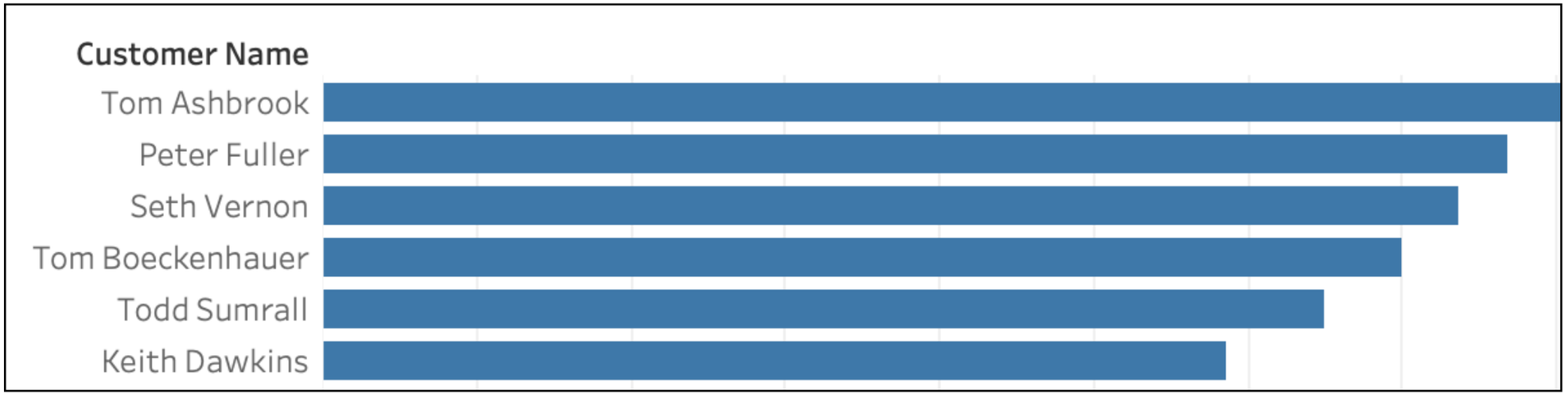


With TOP 10 and New York City

New York City



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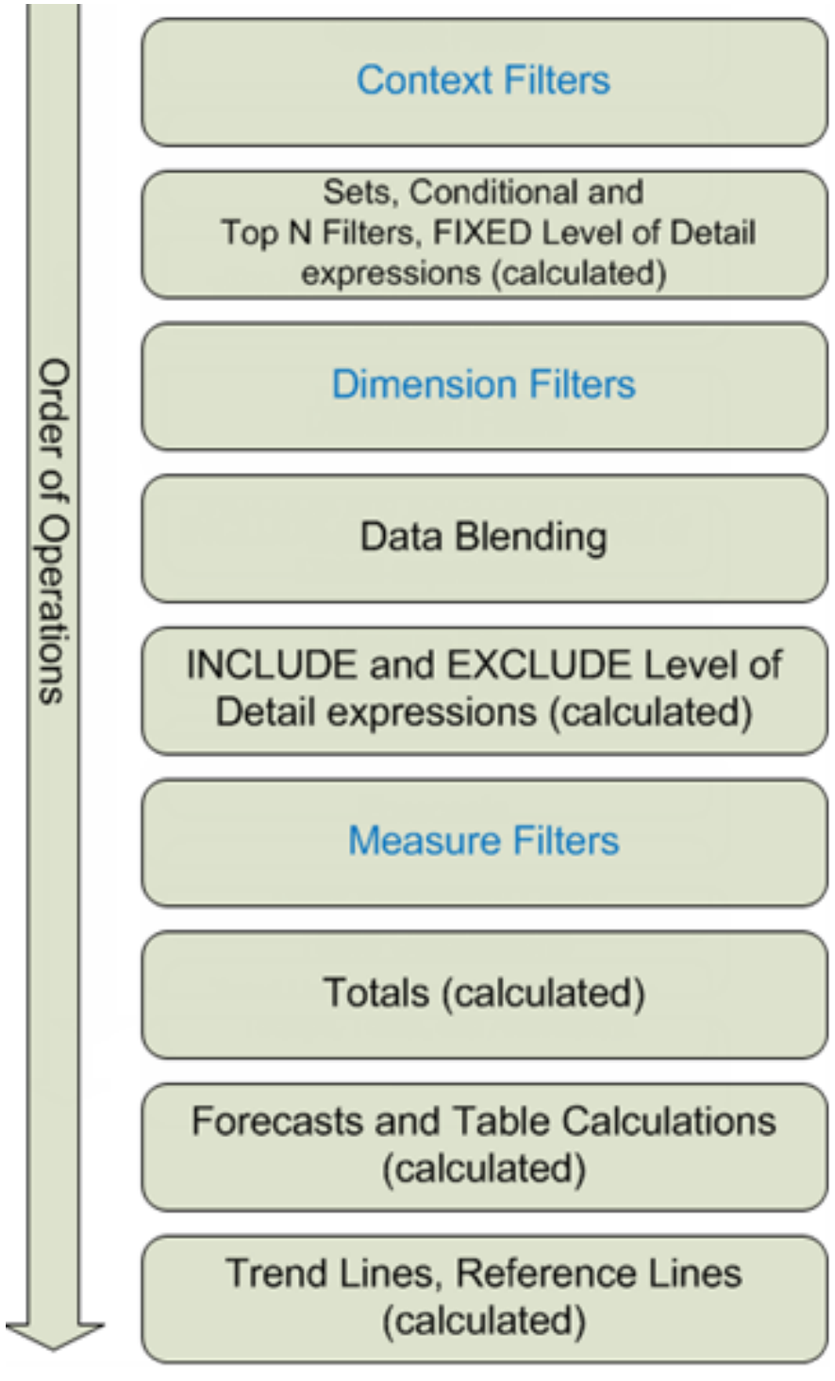


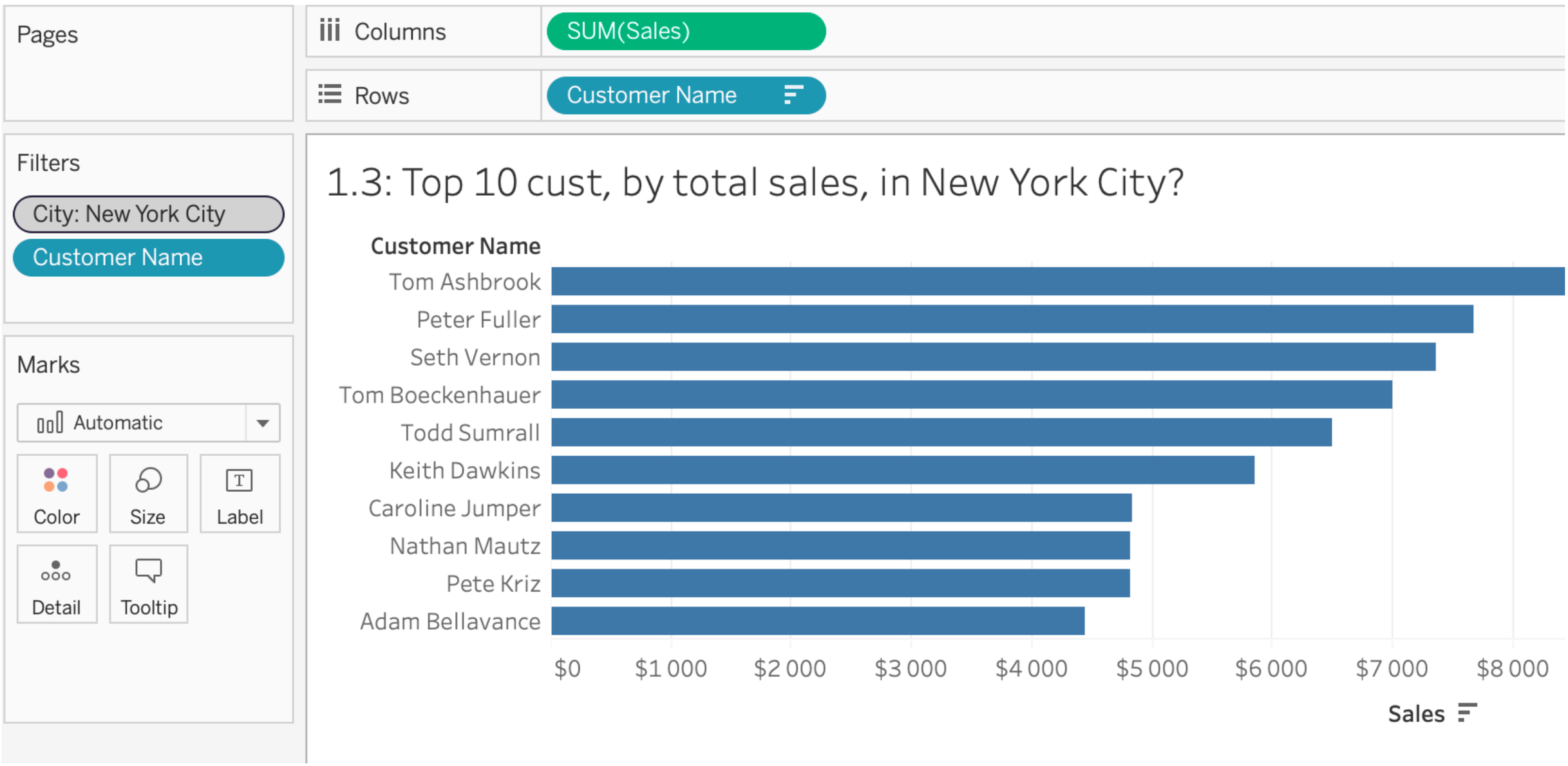
Both filters are dimension filters

TOP 10 names by Total Sales

City = ´New York City´

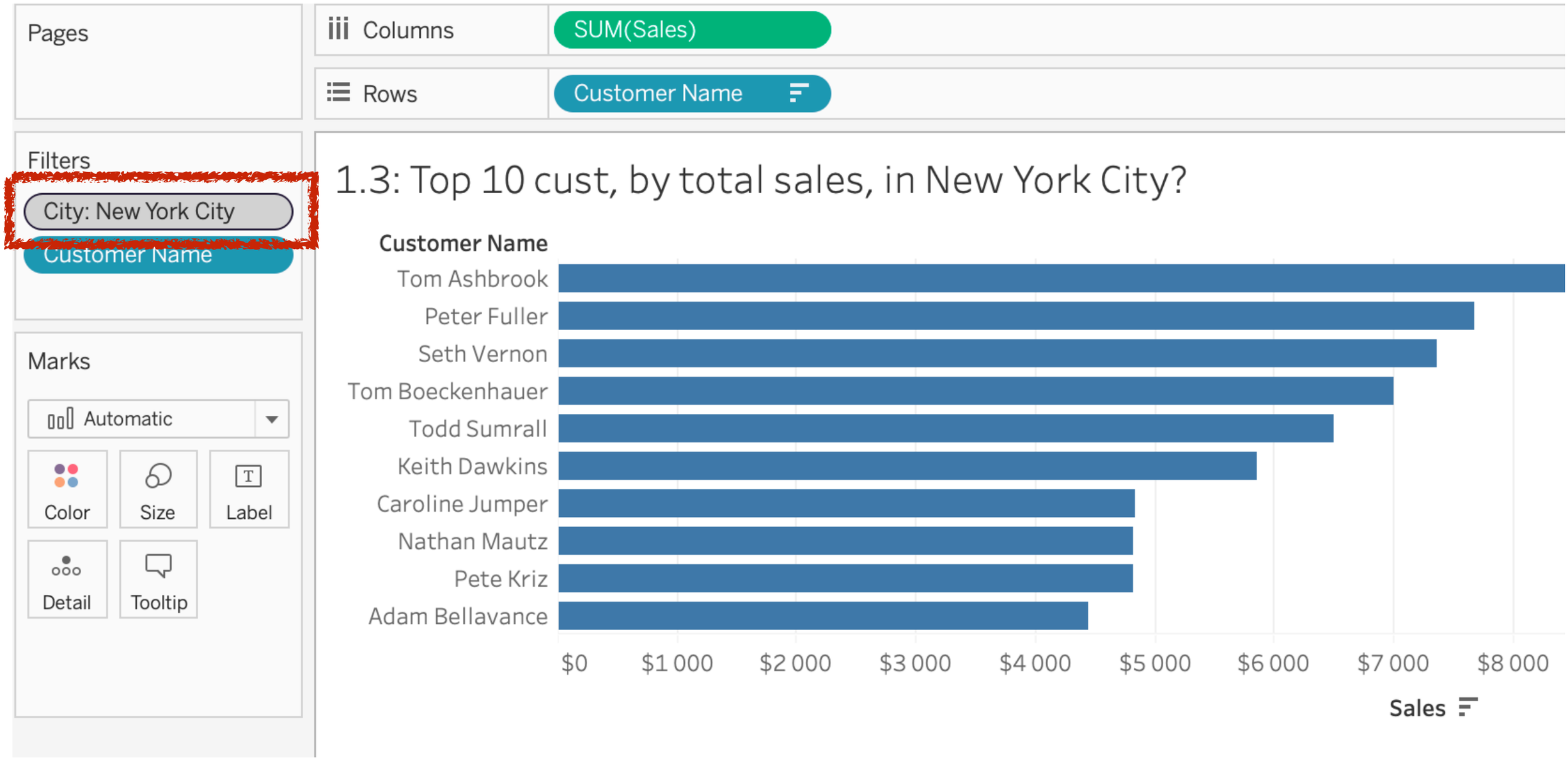
They are executed independently !

Who are the top 10 customers, by total sales, in New York City?



Make a Dimension Filter as **Context**

Who are the top 10 customers, by total sales, in New York City?



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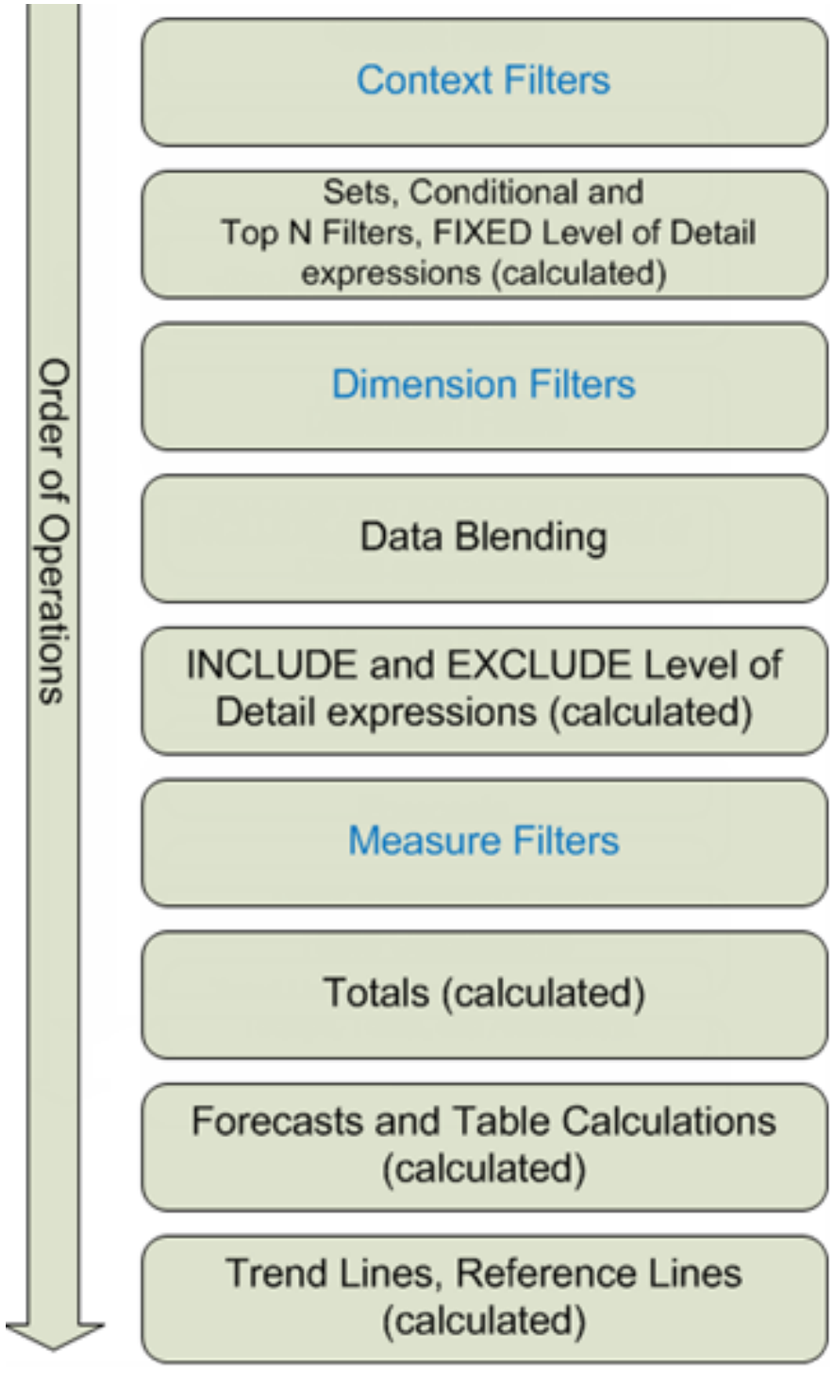


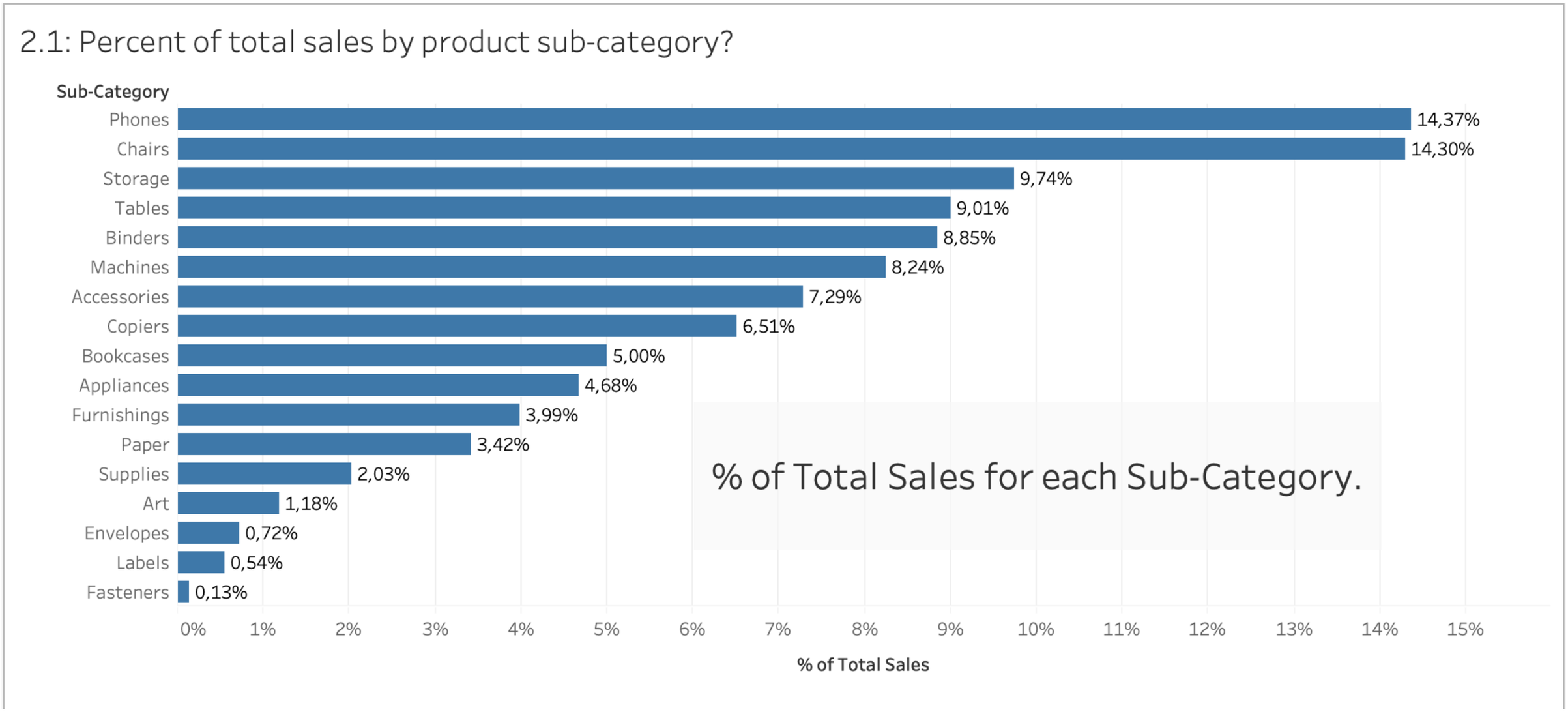
1: City = ´New York City´

2: TOP 10 names by Total Sales

They are executed sequentially !

What is the percent of total sales by product sub-category?

What is the percent of total sales by product sub-category?

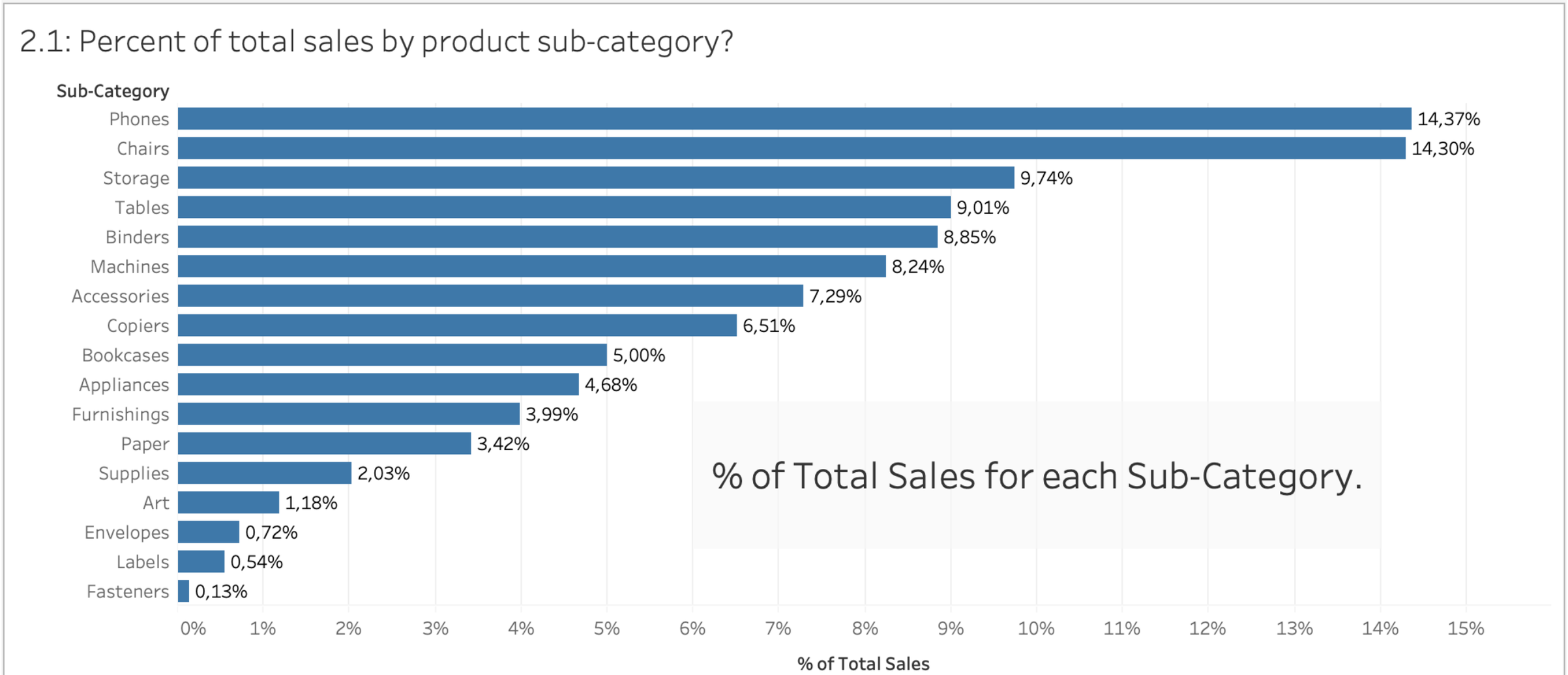


What is the percent of total sales by product sub-category?

What is the percent of total sales by product sub-category?

Columns: SUM(Sales)

Rows: Sub-Category



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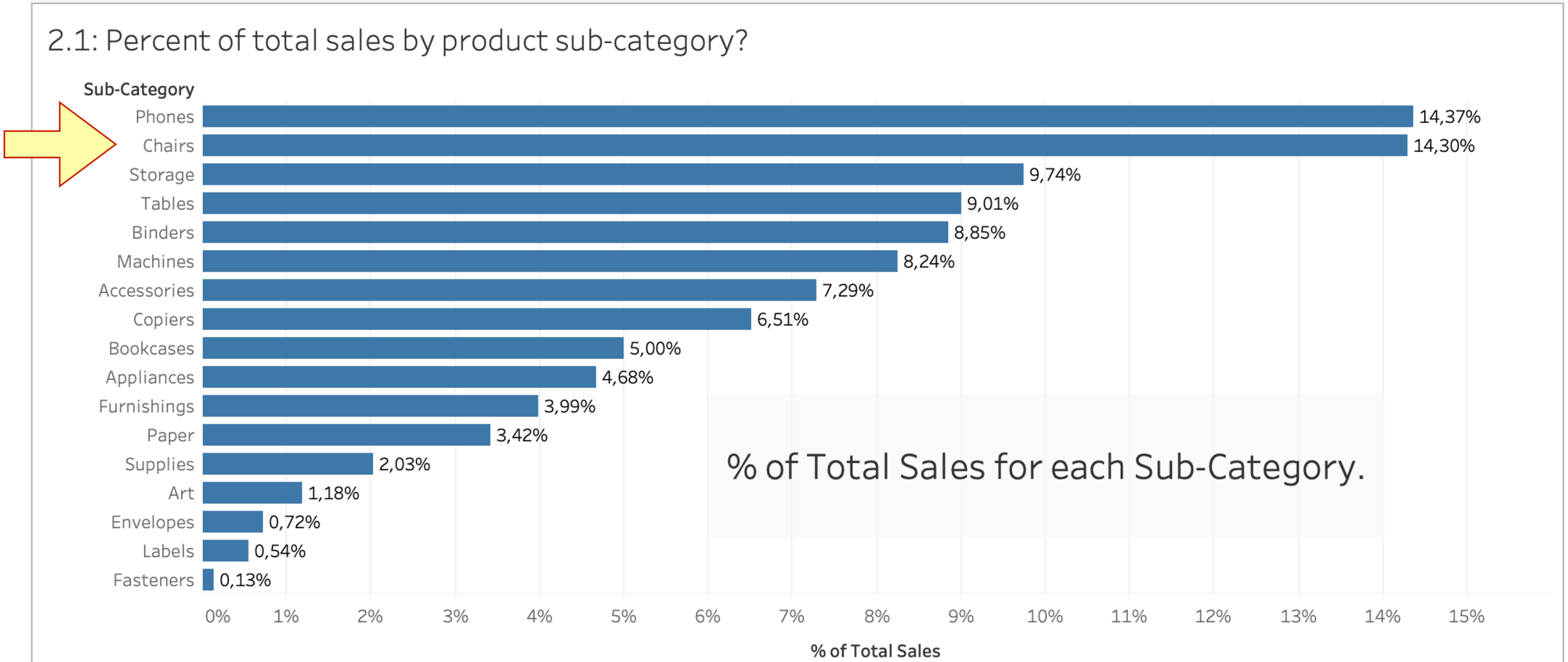


What is the percent of total sales by product sub-category?

Pages

Columns SUM(Sales)

Rows Sub-Category

Filters

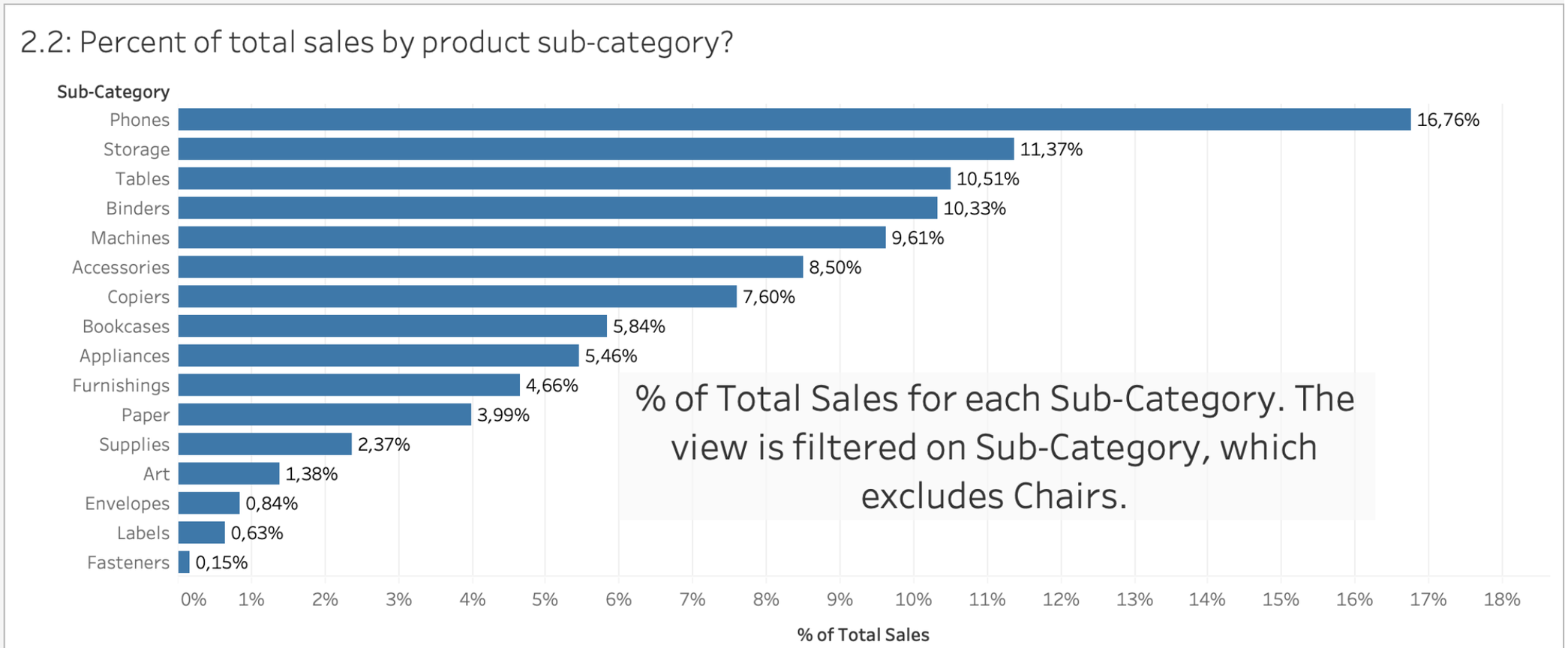
Sub-Category

Marks

Automatic

Color Size Label

Detail Tooltip



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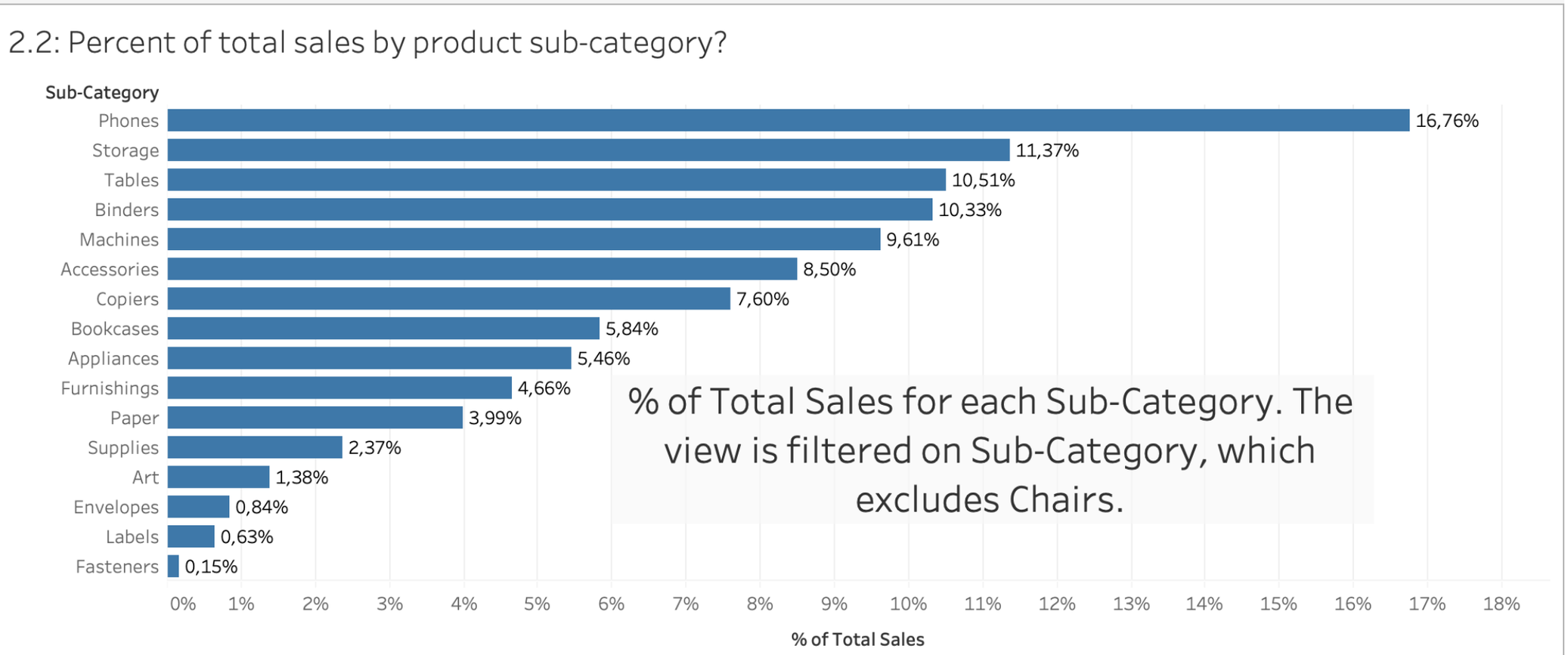

What is the percent of total sales by product sub-category?

Pages

Columns SUM(Sales)

Rows Sub-Category

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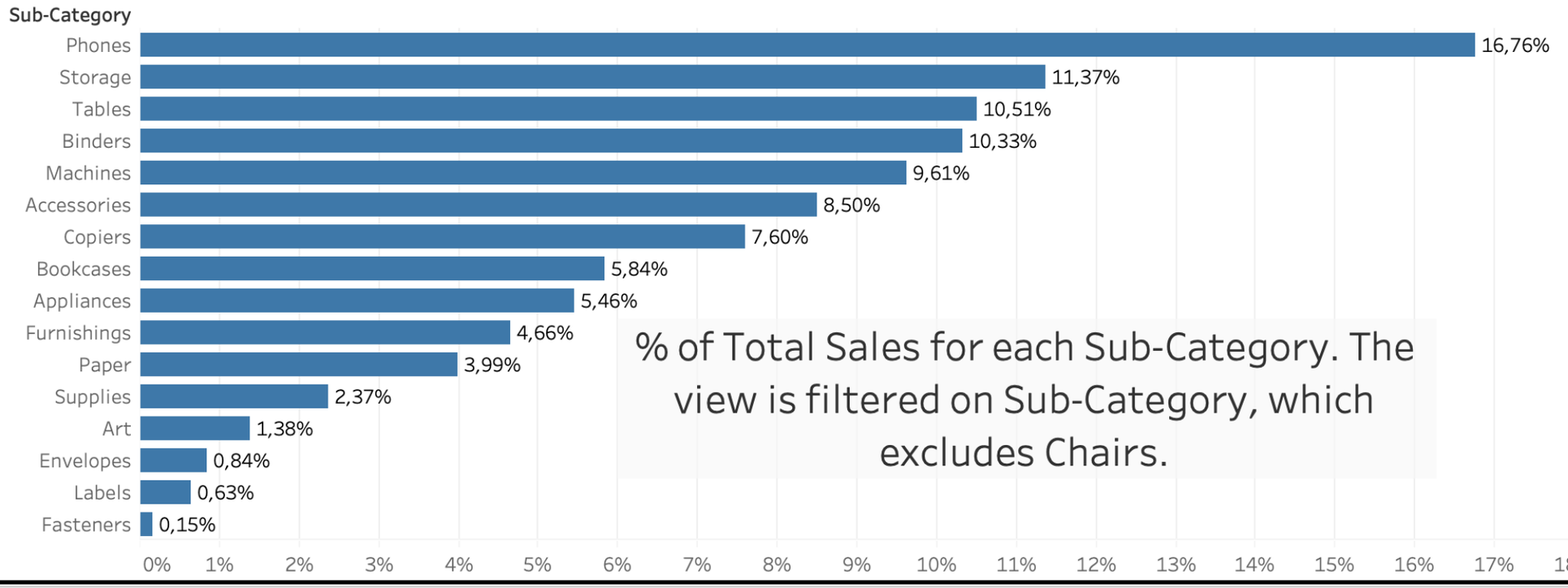
Detail Tooltip

2.2: Percent of total sales by product sub-category?



% of Total Sales for each Sub-Category. The view is filtered on Sub-Category, which excludes Chairs.

Columns SUM(Sales)

Rows Sub-Category

2.1: Percent of total sales by product sub-category?

Without Filtering

What is the percent of total sales by product sub-category?

Pages

Columns SUM(Sales)

Rows Sub-Category

Filters

Sub-Category

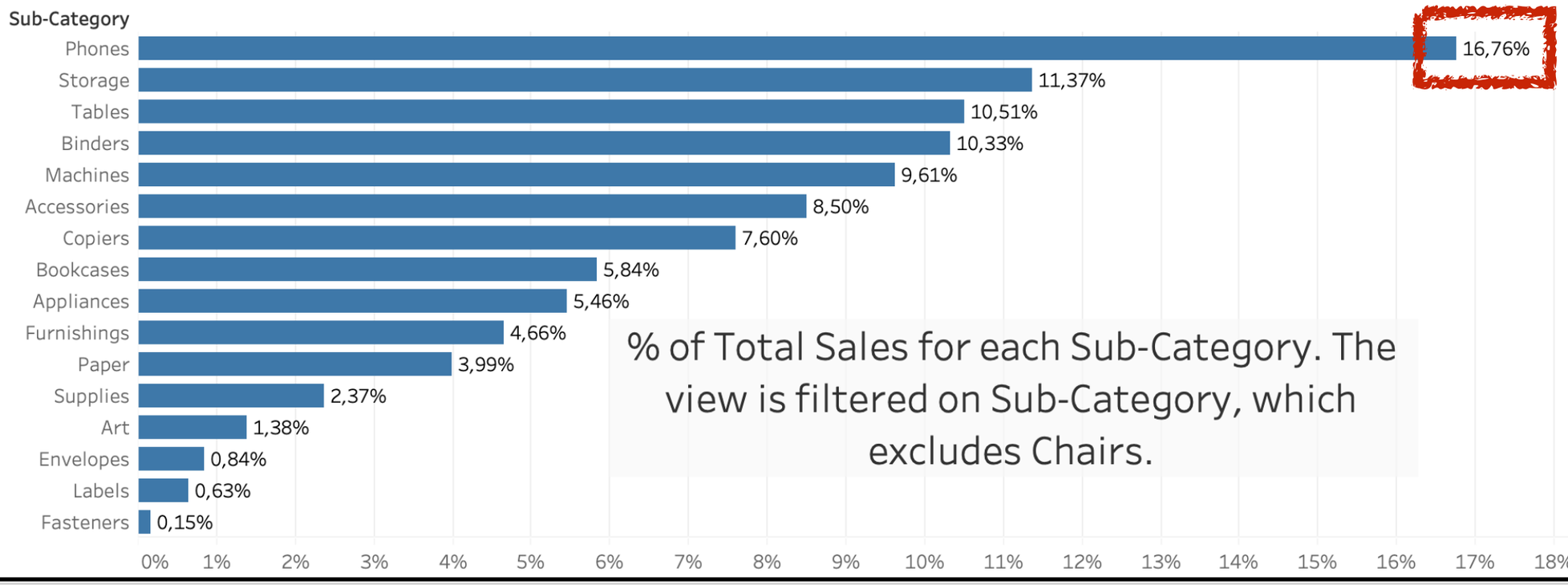
Marks

Automatic

Color Size Label

Detail Tooltip

2.2: Percent of total sales by product sub-category?



% of Total Sales for each Sub-Category. The view is filtered on Sub-Category, which excludes Chairs.

Columns SUM(Sales)

Rows Sub-Category

2.1: Percent of total sales by product sub-category?

Without Filtering

What is the percent of total sales by product sub-category?

Pages

Columns: SUM(Sales)

Rows: Sub-Category

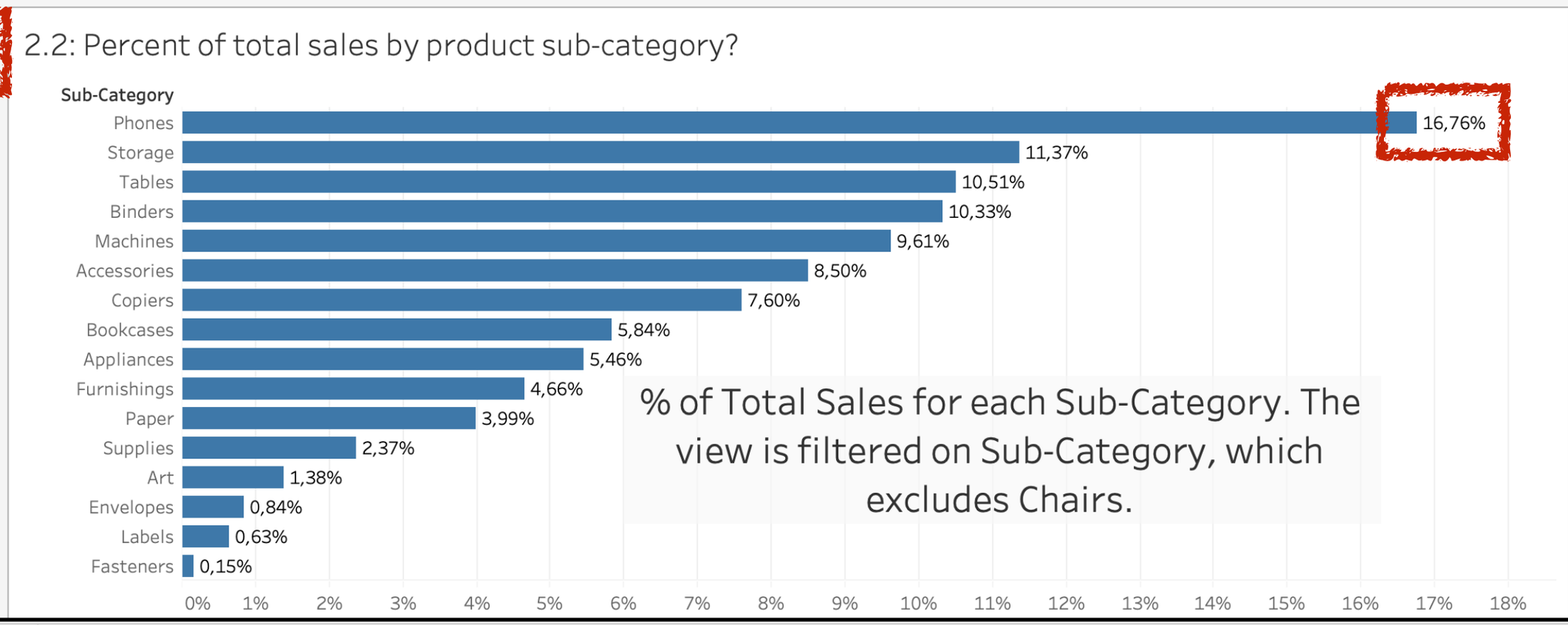
Filters

Sub-Category

Marks

Automatic

Color | Size | Label | Detail | Tooltip



Columns: SUM(Sales)

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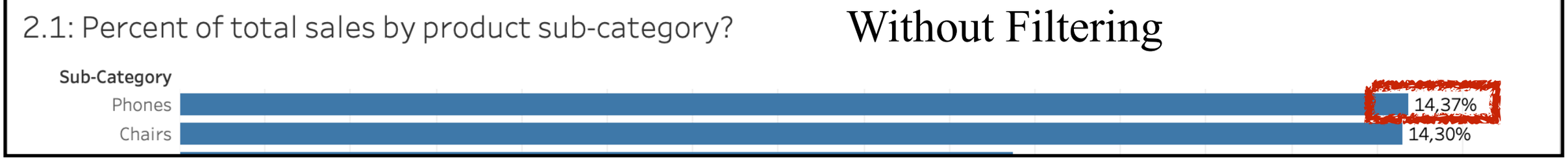

Without Filtering

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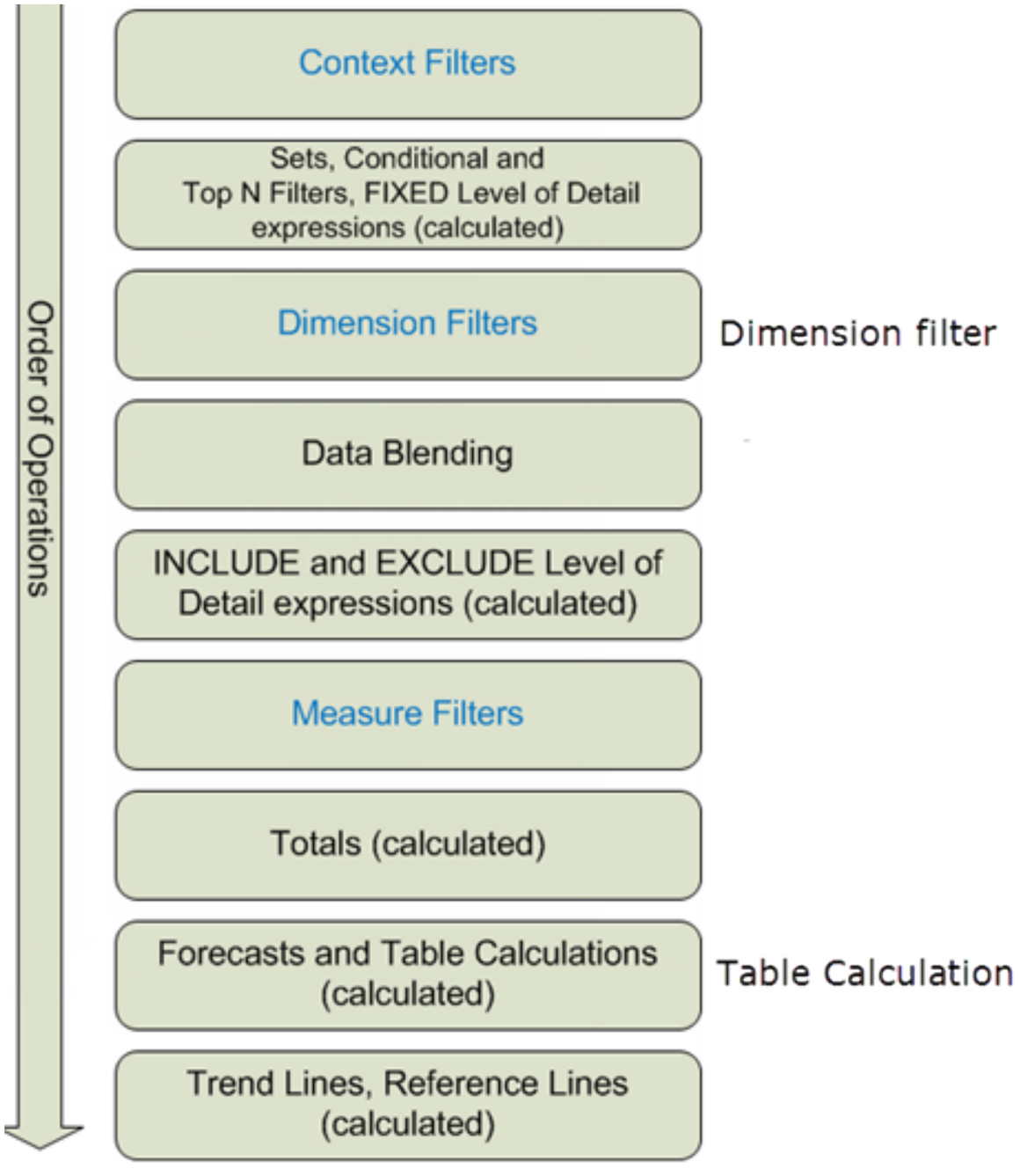
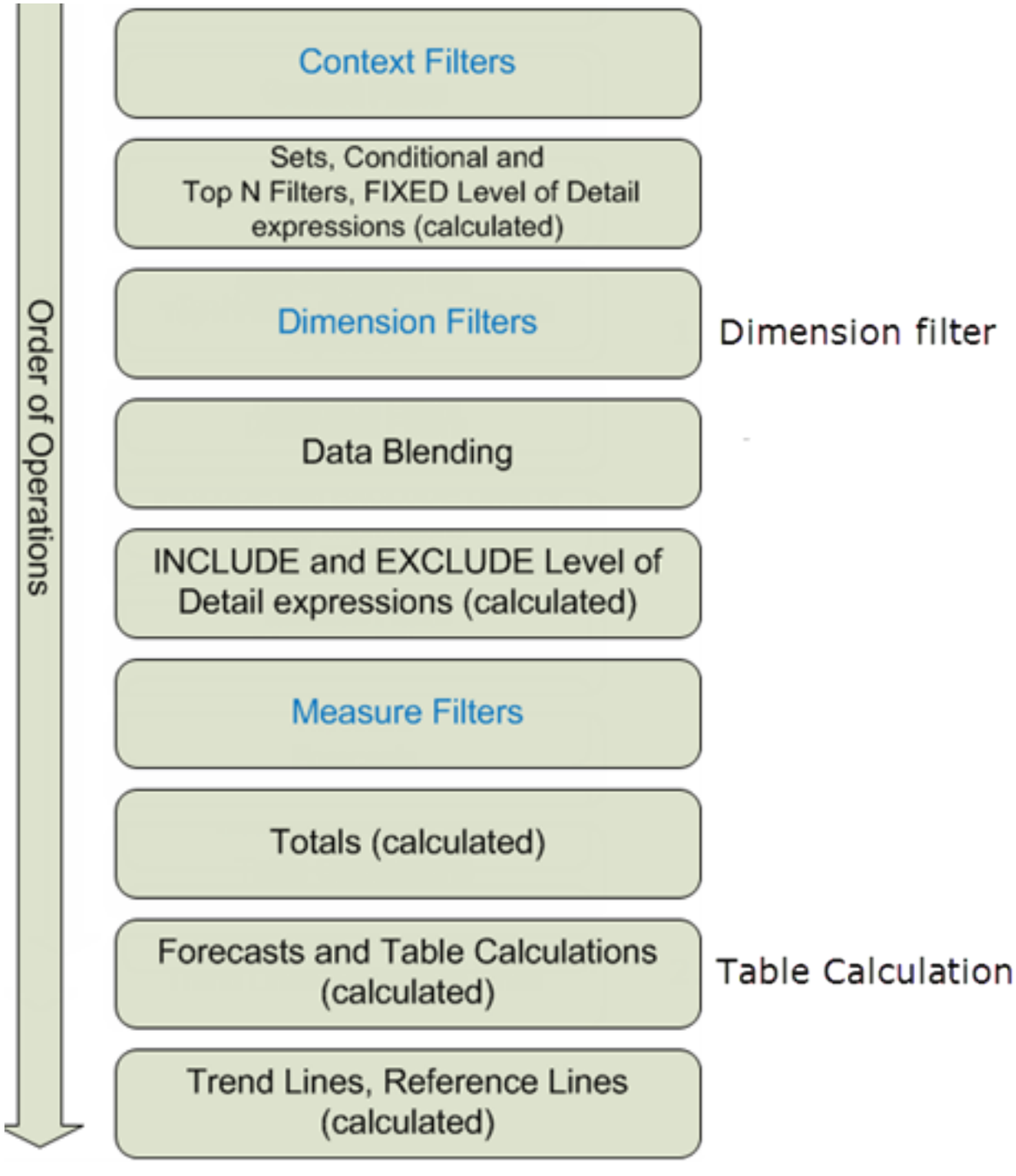


Exclude Chairs

% of Total of Sales

What is the percent of total sales by product sub-category?



% of Total of Sales

LOD

Exclude Chairs

% of Total of Sales

What is the percent of total sales by product sub-category?

LOD Percent Total of Sales per Sub-

```
SUM([Sales])/SUM({FIXED : SUM([Sales])})
```

What is the percent of total sales by product sub-category?

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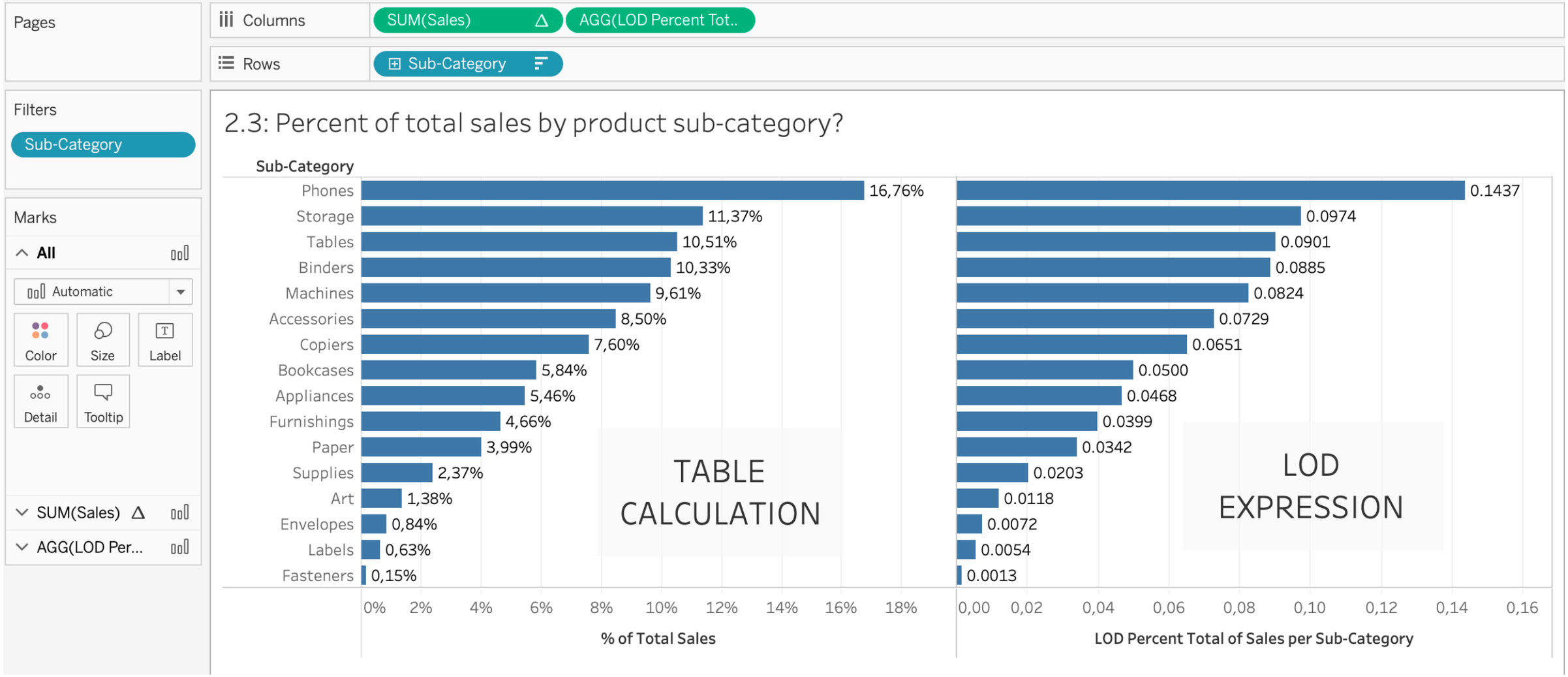
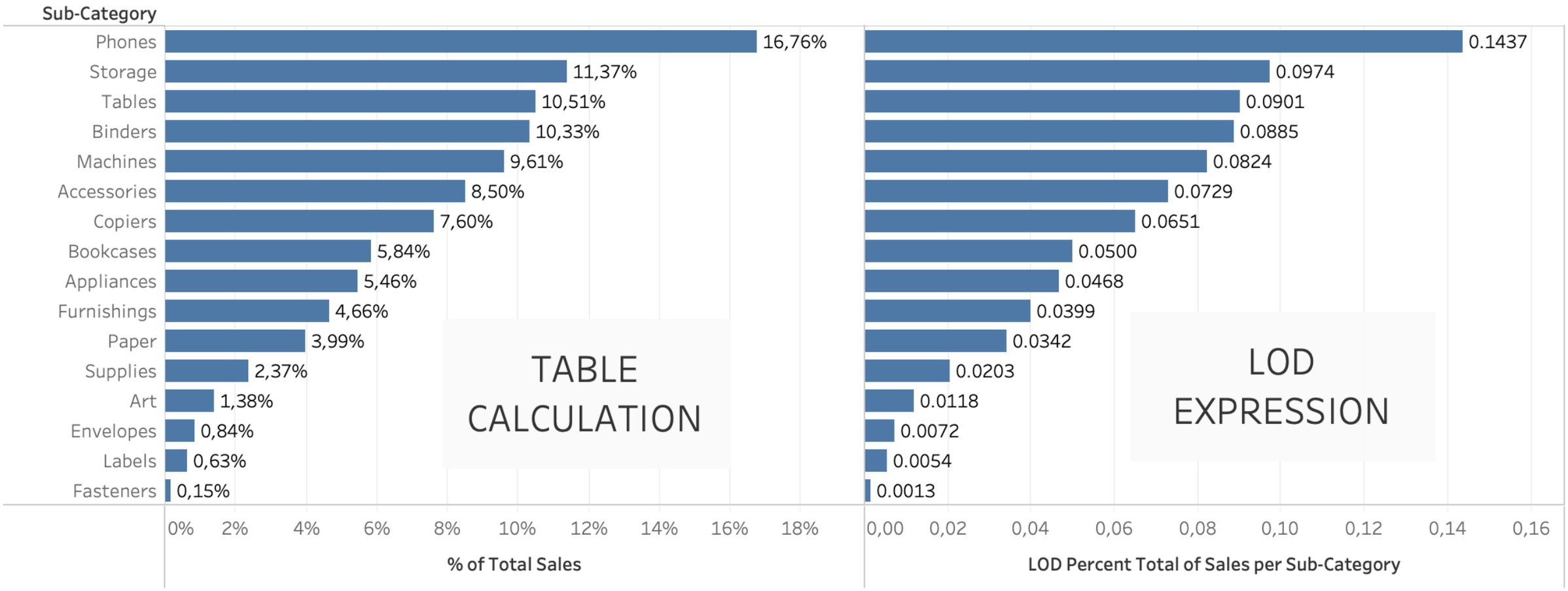


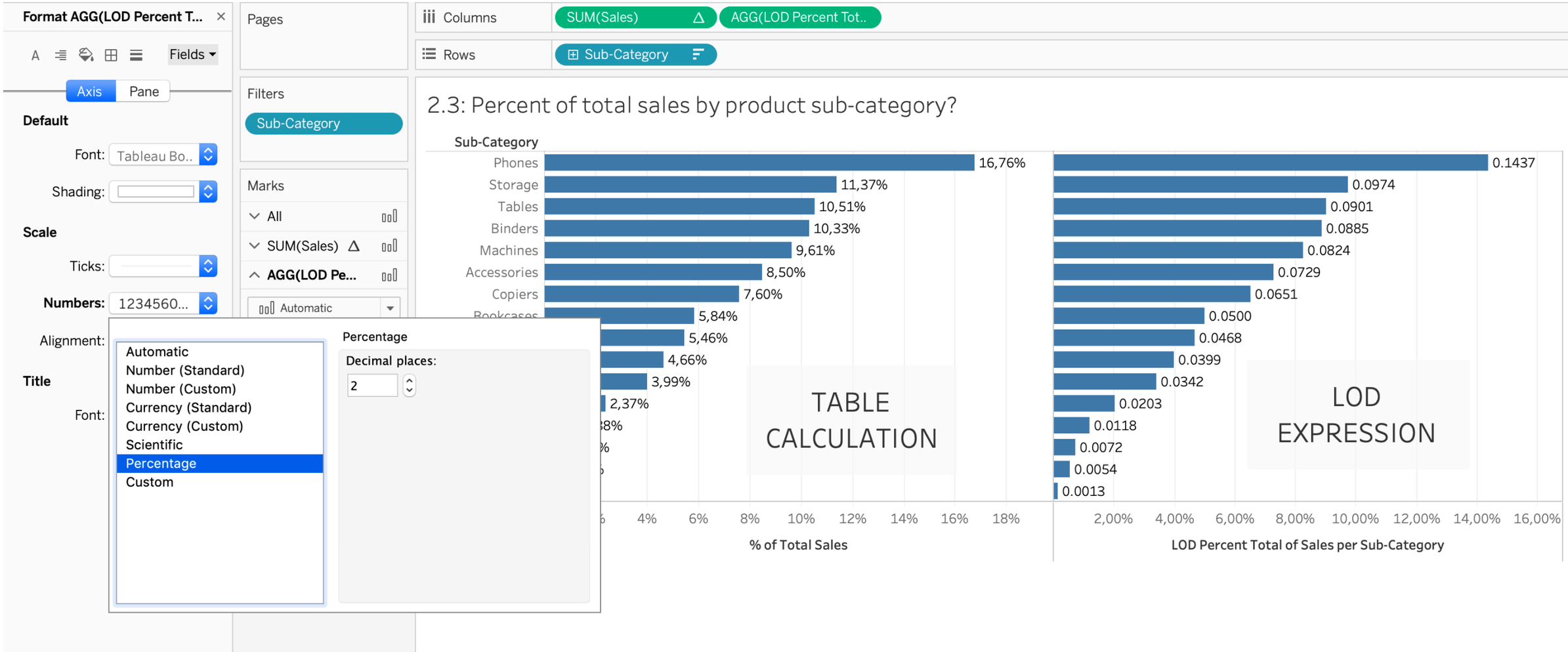
What is the percent of total sales by product sub-category?

2.3: Percent of total sales by product sub-category?



% of Total Sales and LOD Percent Total of Sales per Sub-Category for each Sub-Category. The view is filtered on Sub-Category, which excludes Chairs.

What is the percent of total sales by product sub-category?



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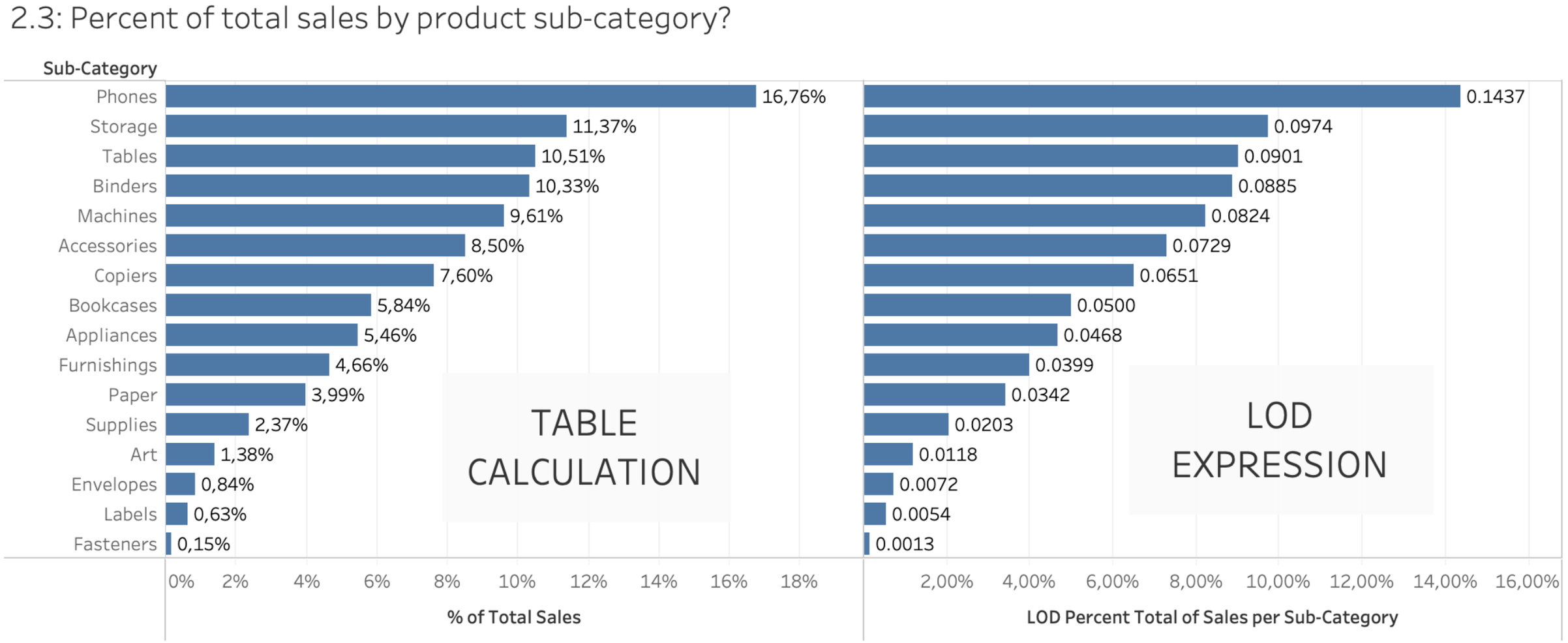

% of Total Sales and LOD Percent Total of Sales per Sub-Category for each Sub-Category. The view is filtered on Sub-Category, which excludes Chairs.

Exclude Chairs

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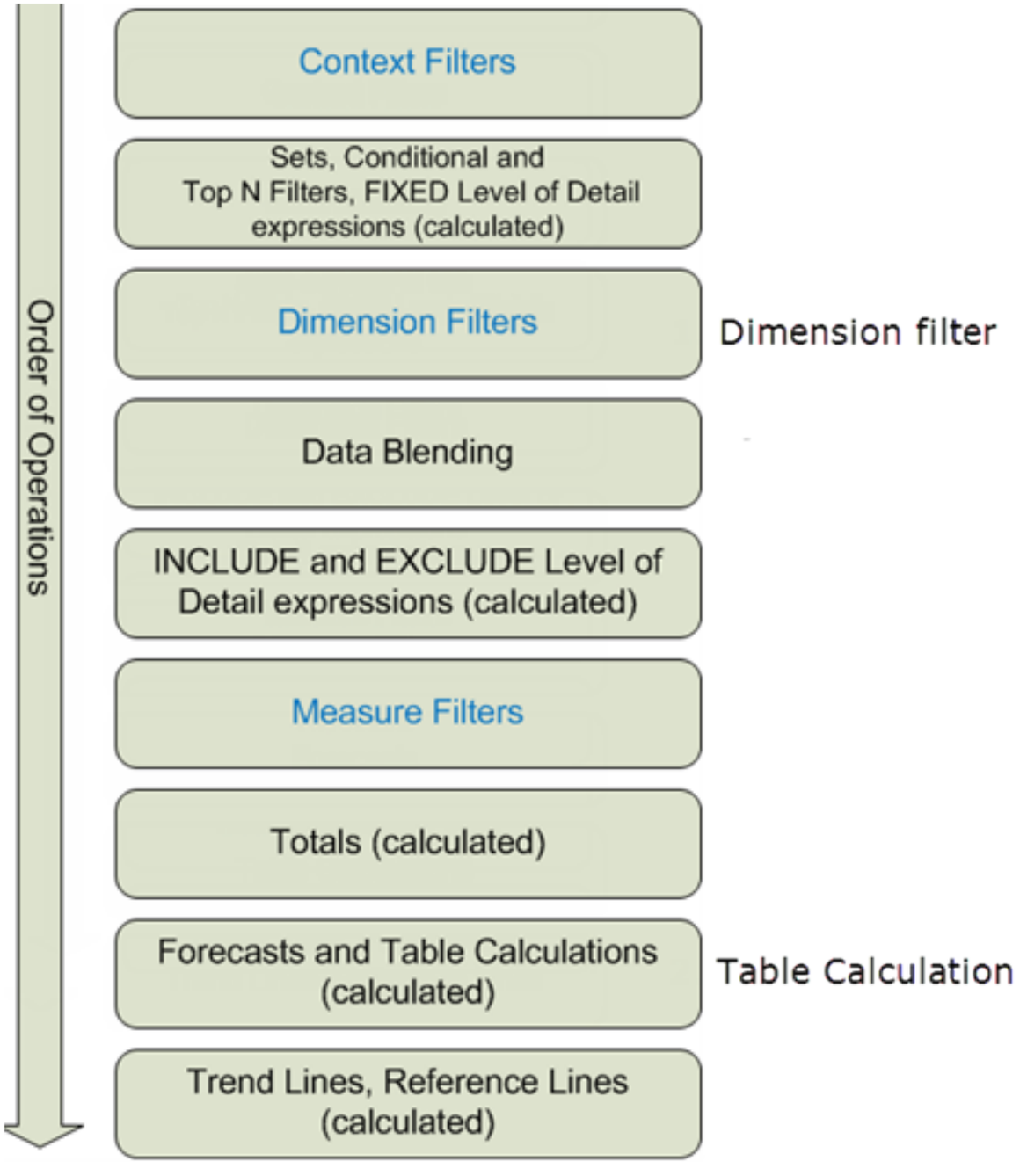


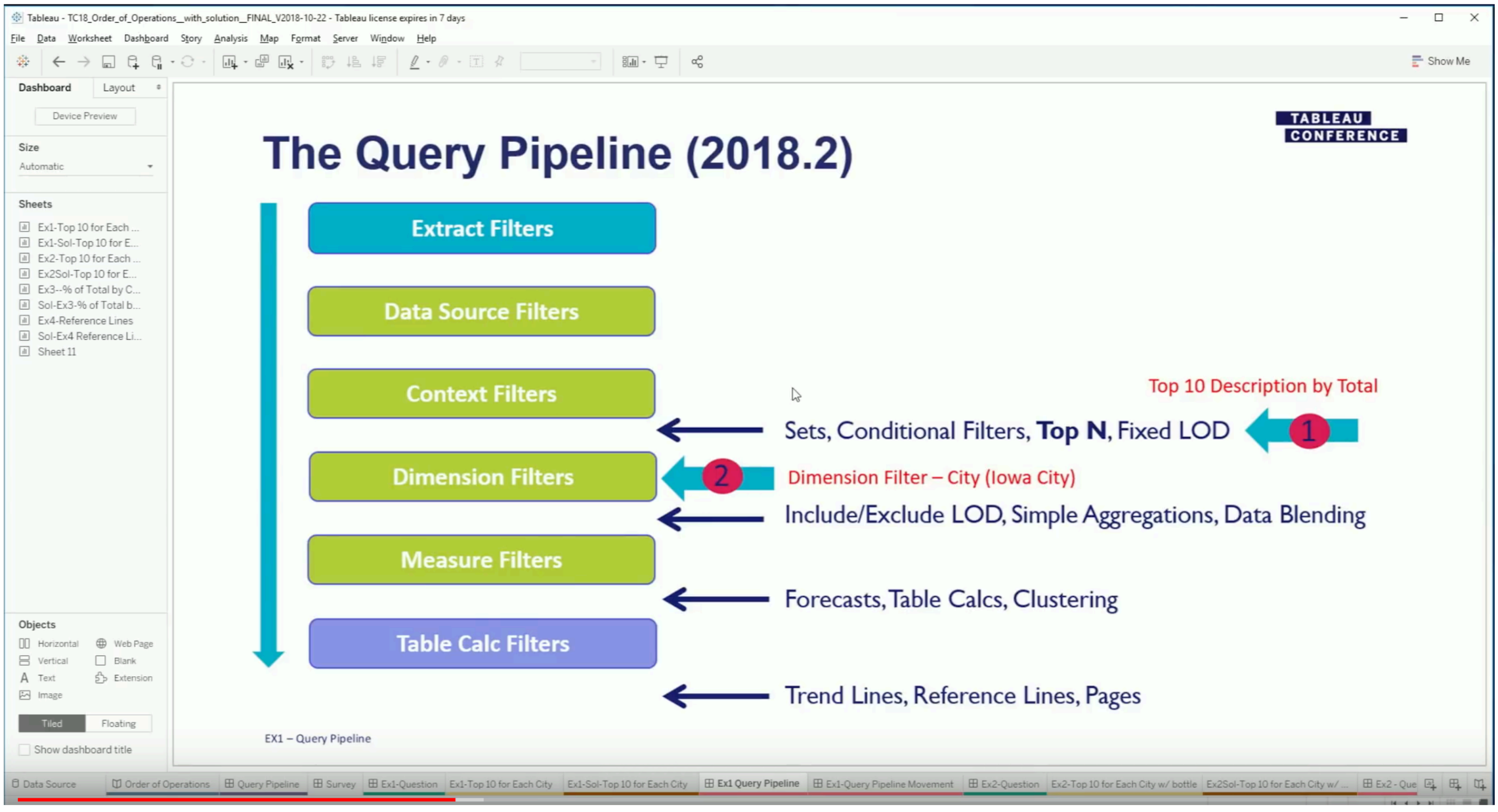
% of Total of Sales **LOD**

Exclude Chairs

% of Total of Sales

Recommended Activity

https://youtu.be/fyDY0_Ivy54

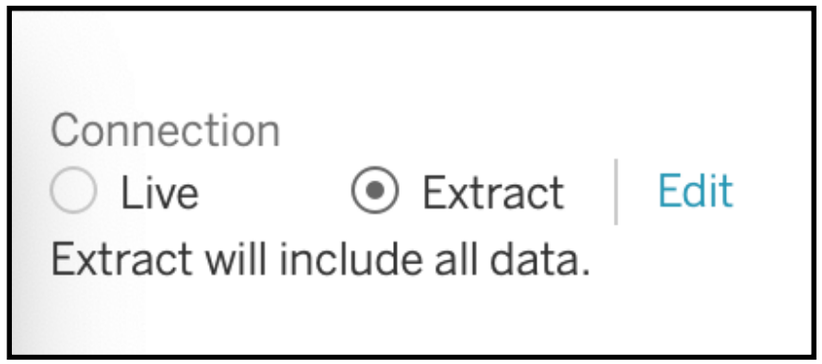


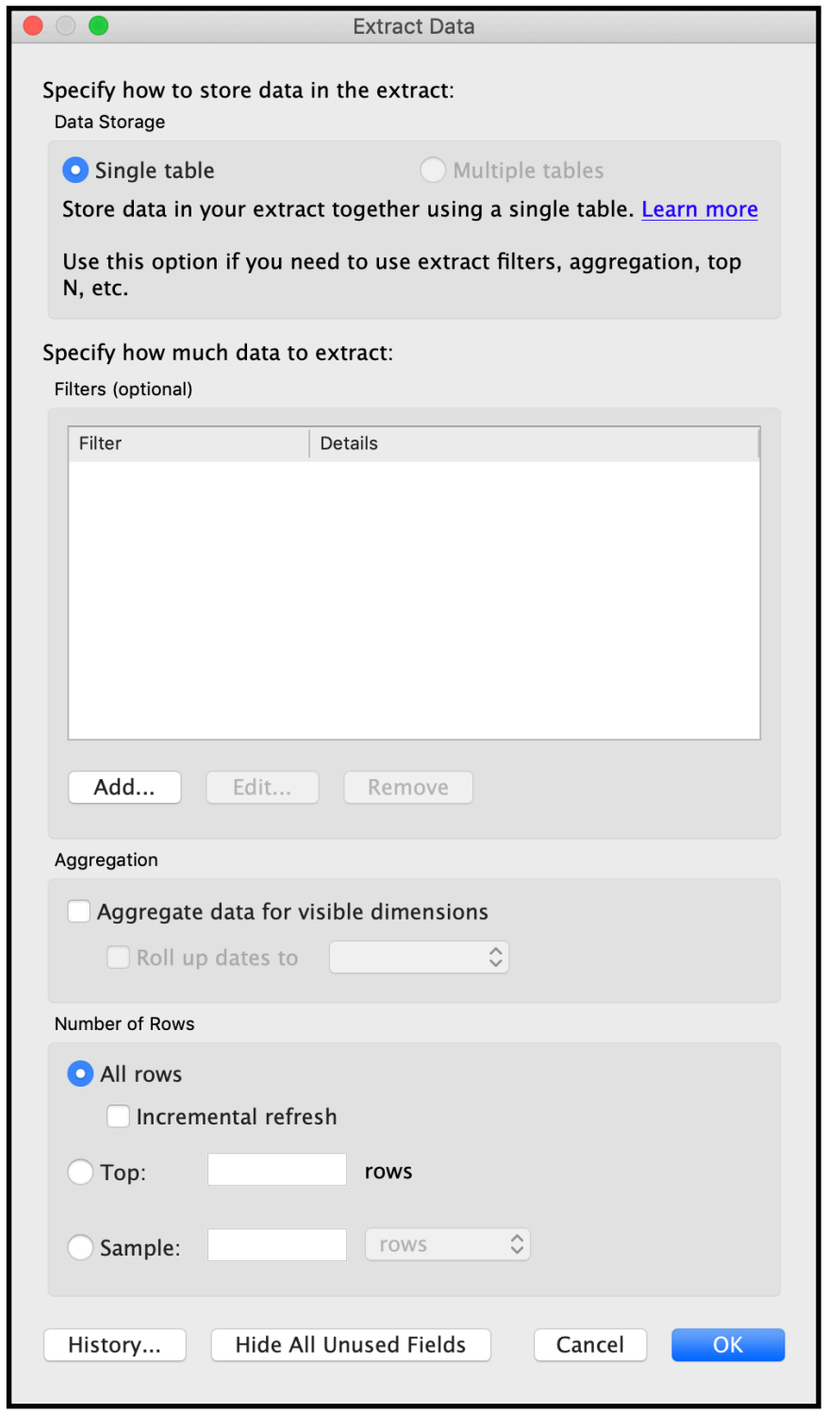
Filtering data in tableau

Types of Filters and Order of Operation

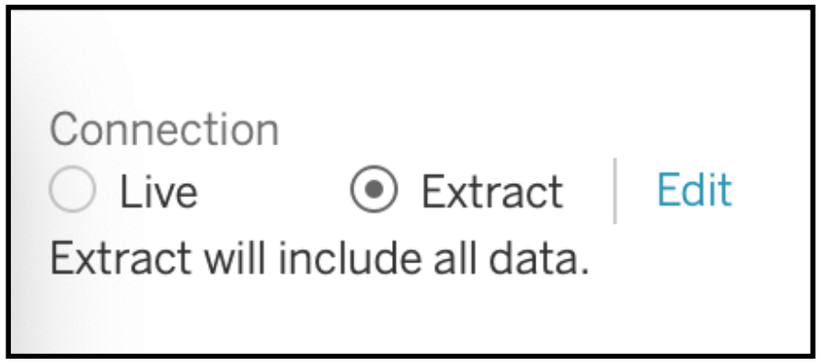
- **Extract Filters**
- **Data Source Filters**
- **Context Filters**
- **Dimension Filters**
- **Measure Filters**

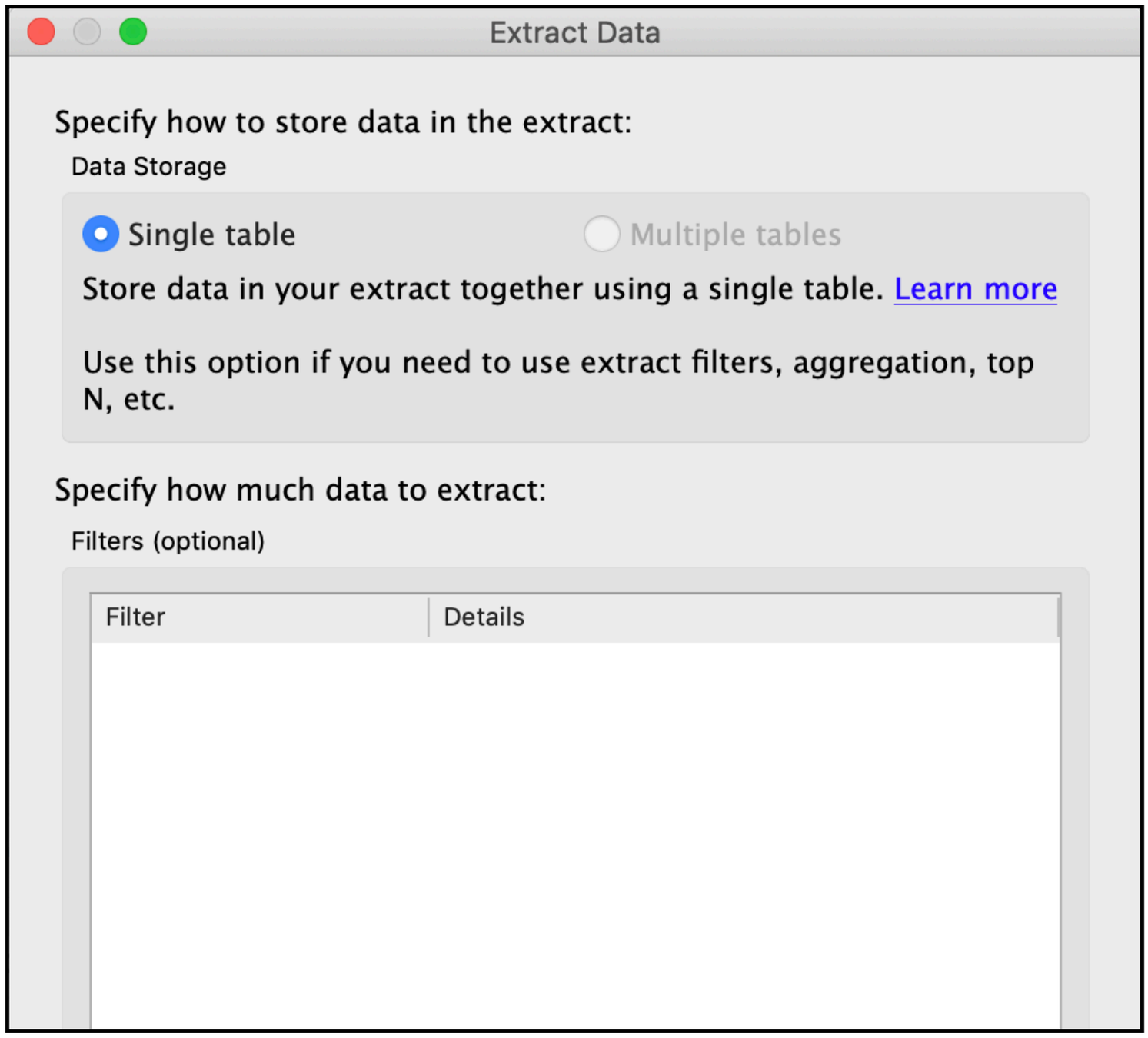
Extract Filters



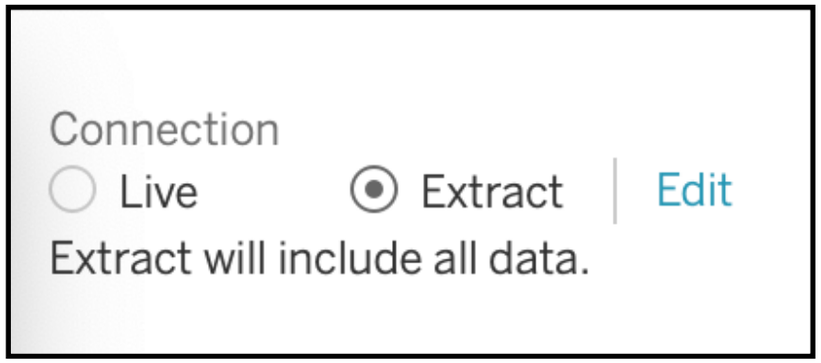


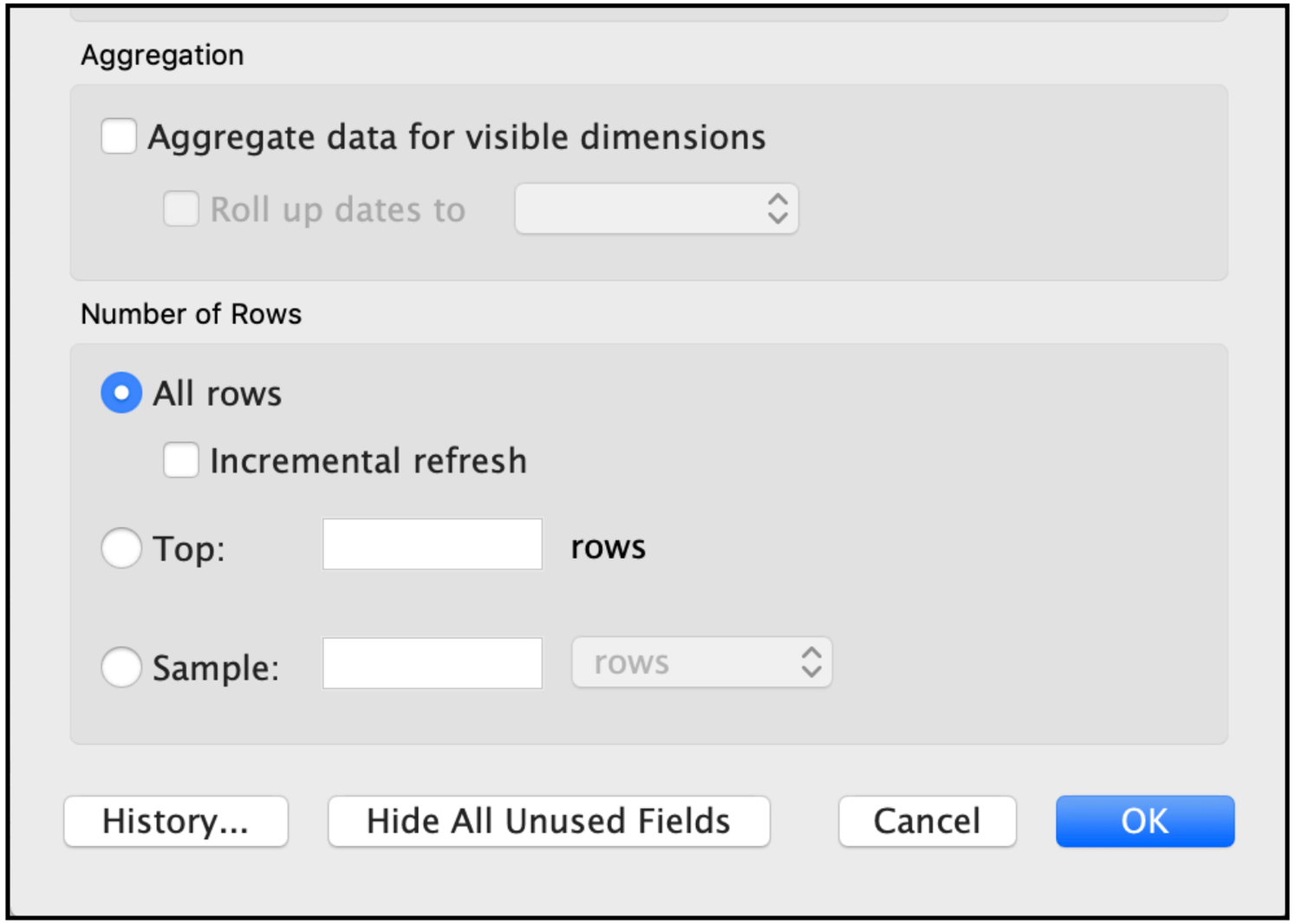
Extract Filters



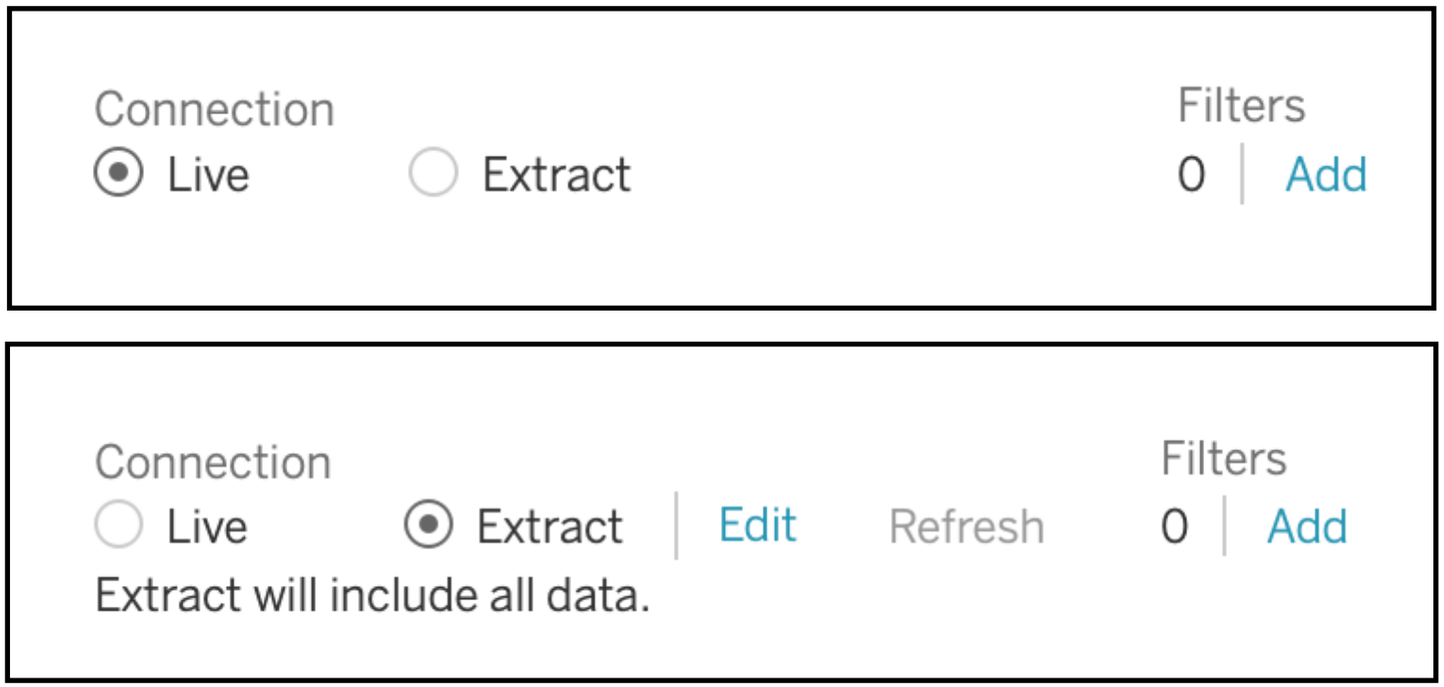


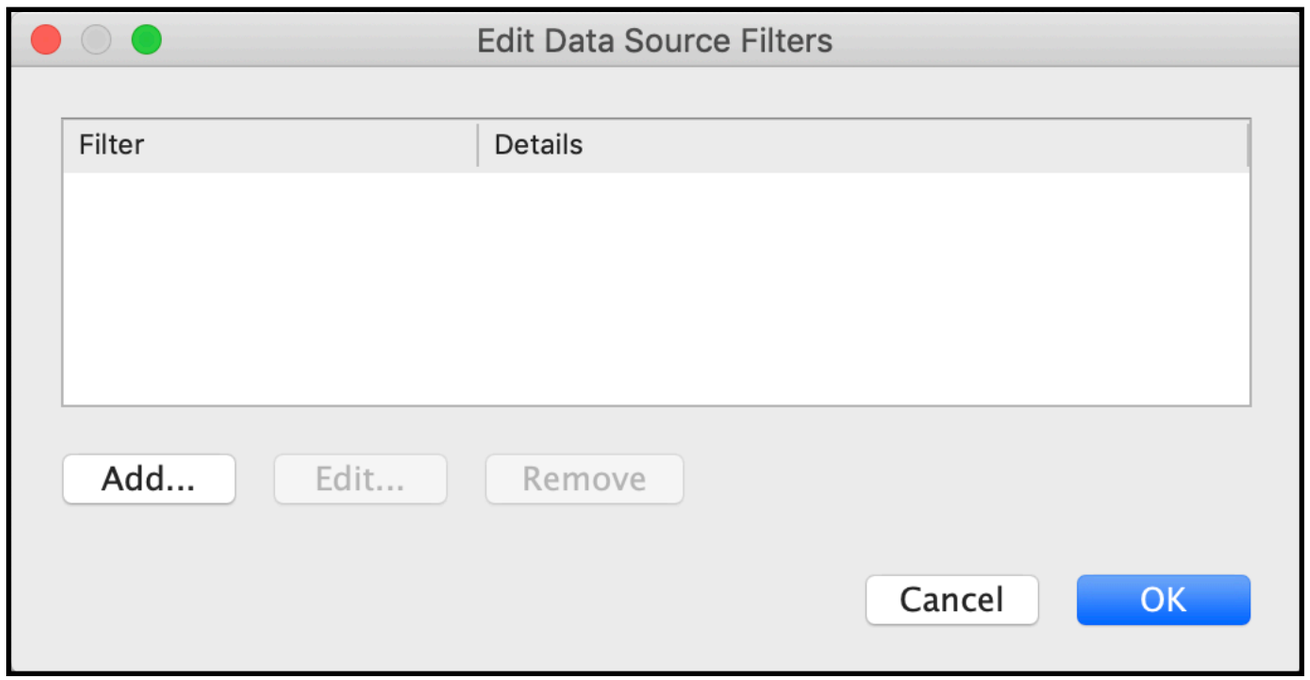
Extract Filters



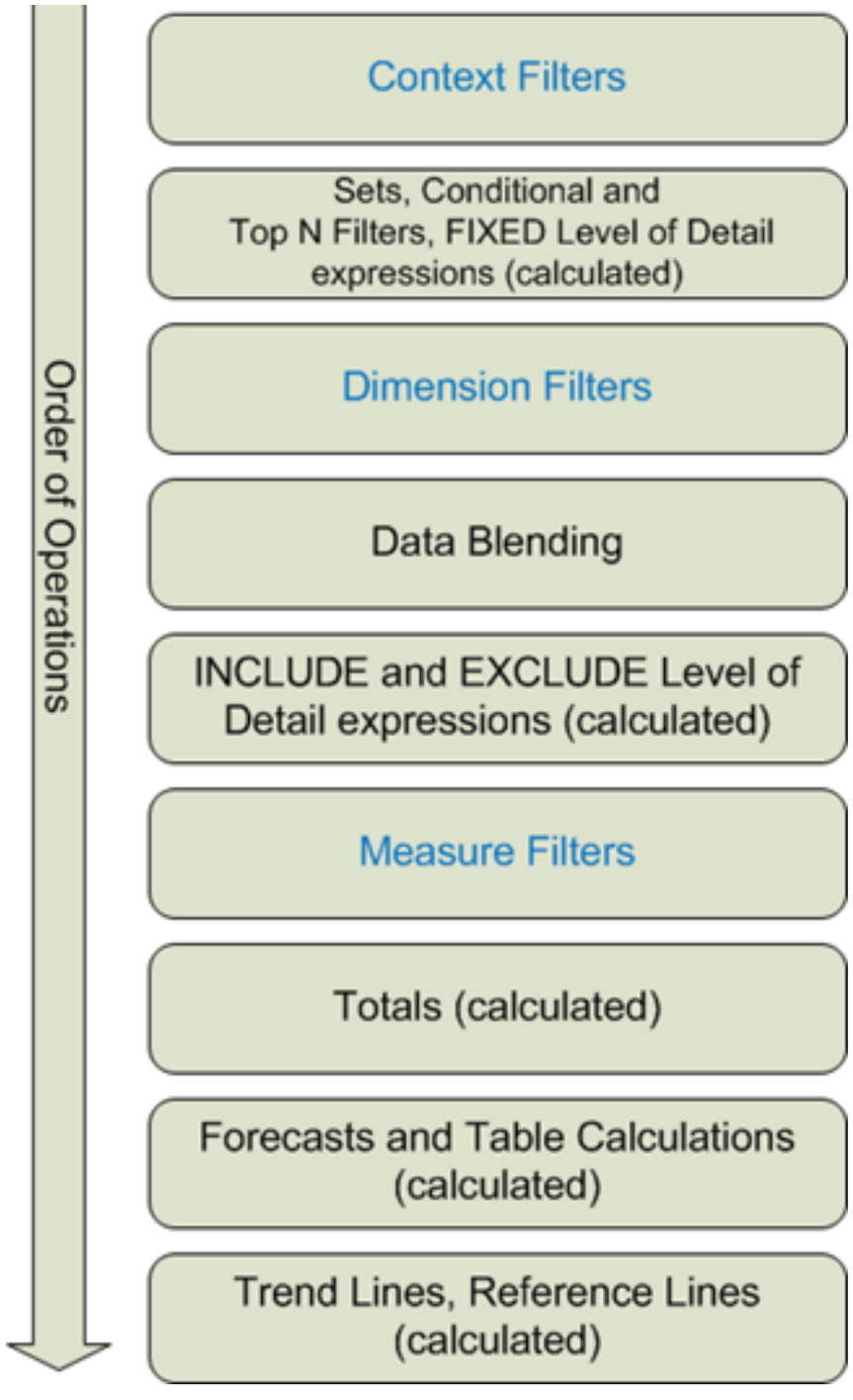


Data Source Filters

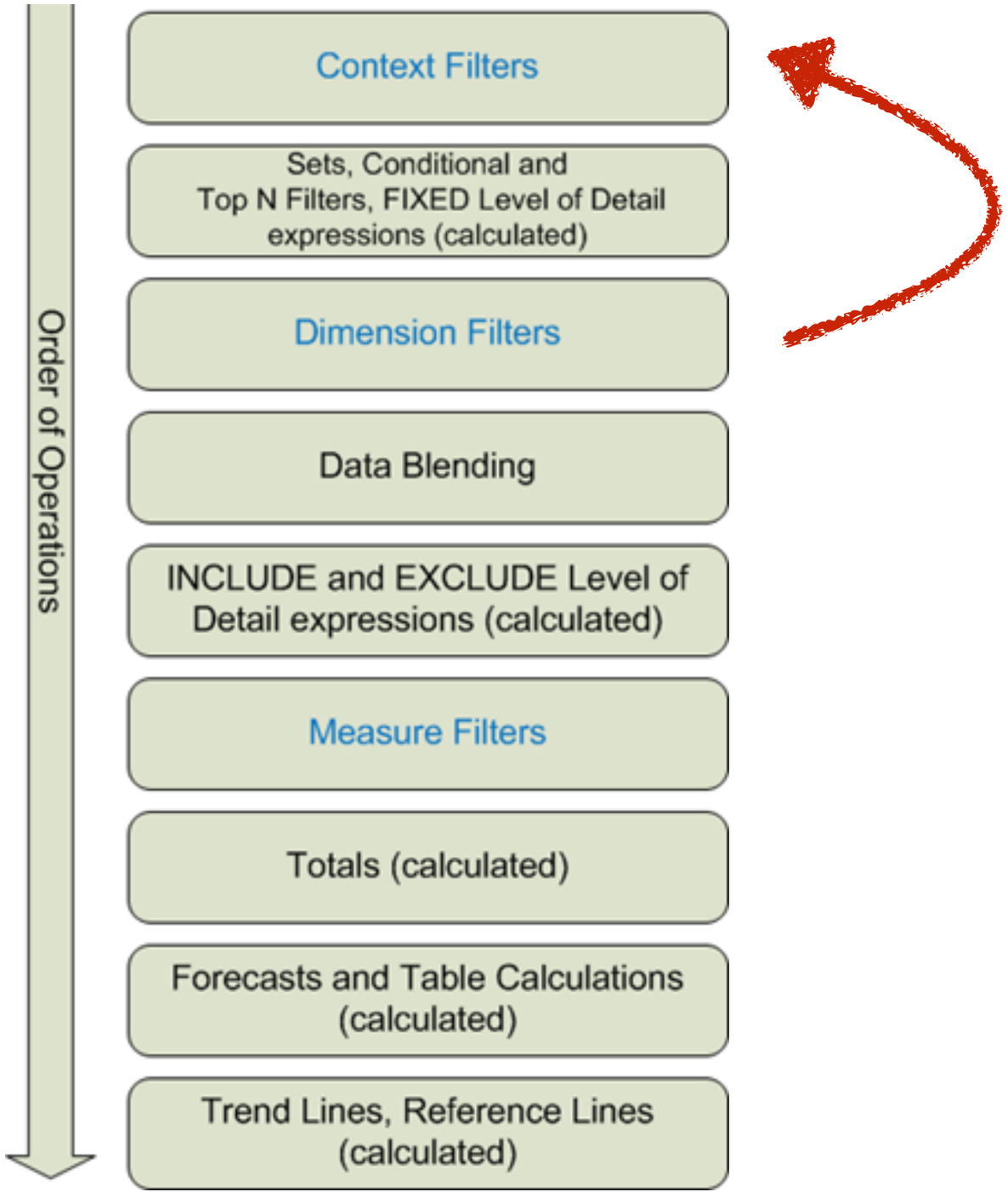




Extract and Data Source Filters



Extract and Data Source Filters



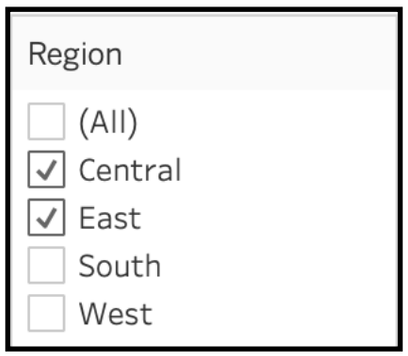
Types of Filters and Order of Operation

- Extract Filters
- Data Source Filters
- Context Filters
- Dimension Filters
- Measure Filters

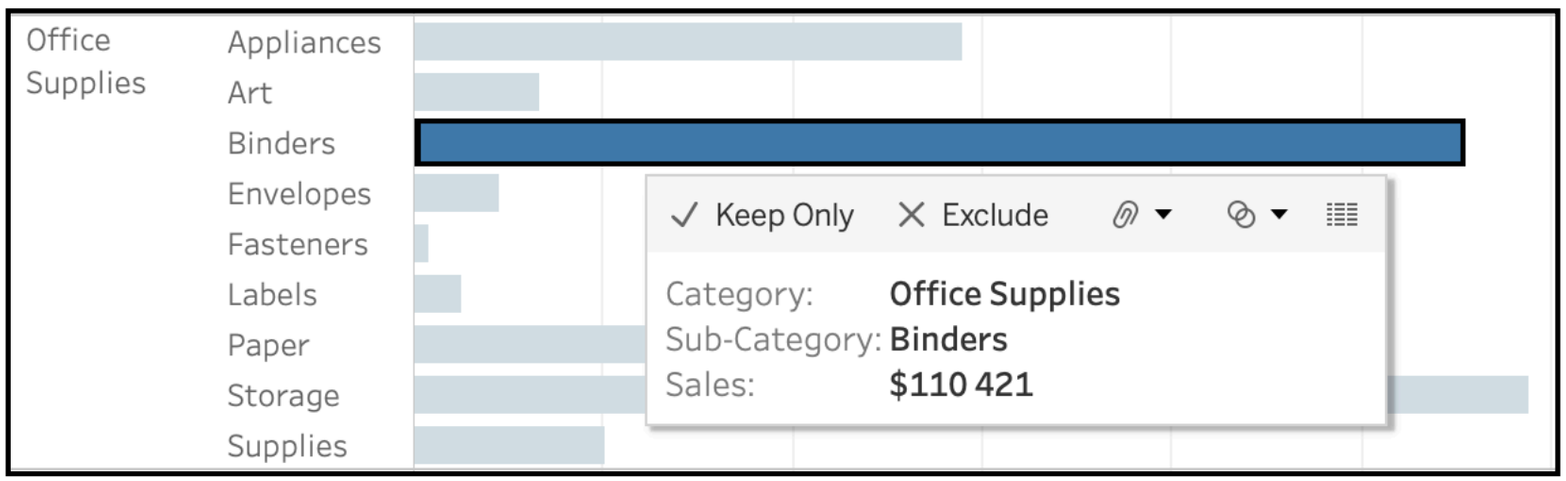
Ways of filtering

- **Filter Shelf**

- **Interactive Filter**



- **View**



Ways of filtering

Link to video

Tableau - Ways to Filter

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Standard | Show Me

Data | Analytics

Global Superstore 2016

Dimensions

- Customers
- Orders
  - Order Date
  - Order ID
  - Order Priority
- Shipping
- Location
- Products
  - Category
  - Sub-Category
  - Product Name
  - Product ID
- Row ID
- *Measure Names*

Measures

- Discount
- Profit
- Quantity
- Sales
- Shipping Cost
- *Latitude (generated)*
- *Longitude (generated)*
- *Number of Records*

Pages

Filters

Marks

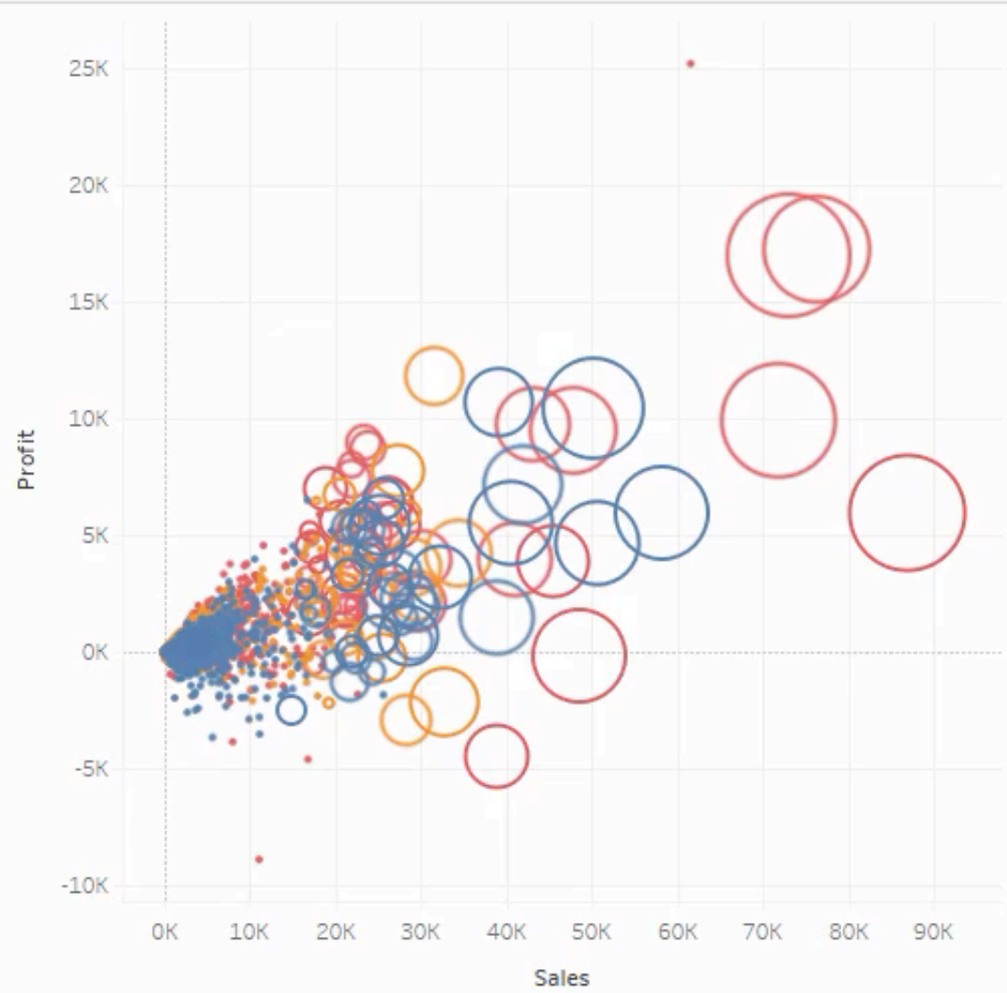
Automatic

Color | Size | Label | Detail | Tooltip | Shape

Category | SUM(Shipping ..) | Product Na..

Columns: SUM(Sales)

Rows: SUM(Profit)



Category

- Furniture
- Office Supplies
- Technology

SUM(Shipping Cost)

≤ 2,000
4,000
6,000
8,817

Data Source | Ways to Filter | Headers | Legends

3788 marks | 1 row by 1 column | SUM(Sales): 12,642,502

Ways of filtering

Link to video

Tableau - Ways to Filter

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Standard | Show Me

Data | Analytics

Global Superstore 2016

Dimensions

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- Profit
- Quantity
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- *Latitude (generated)*
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Pages

Filters

Marks

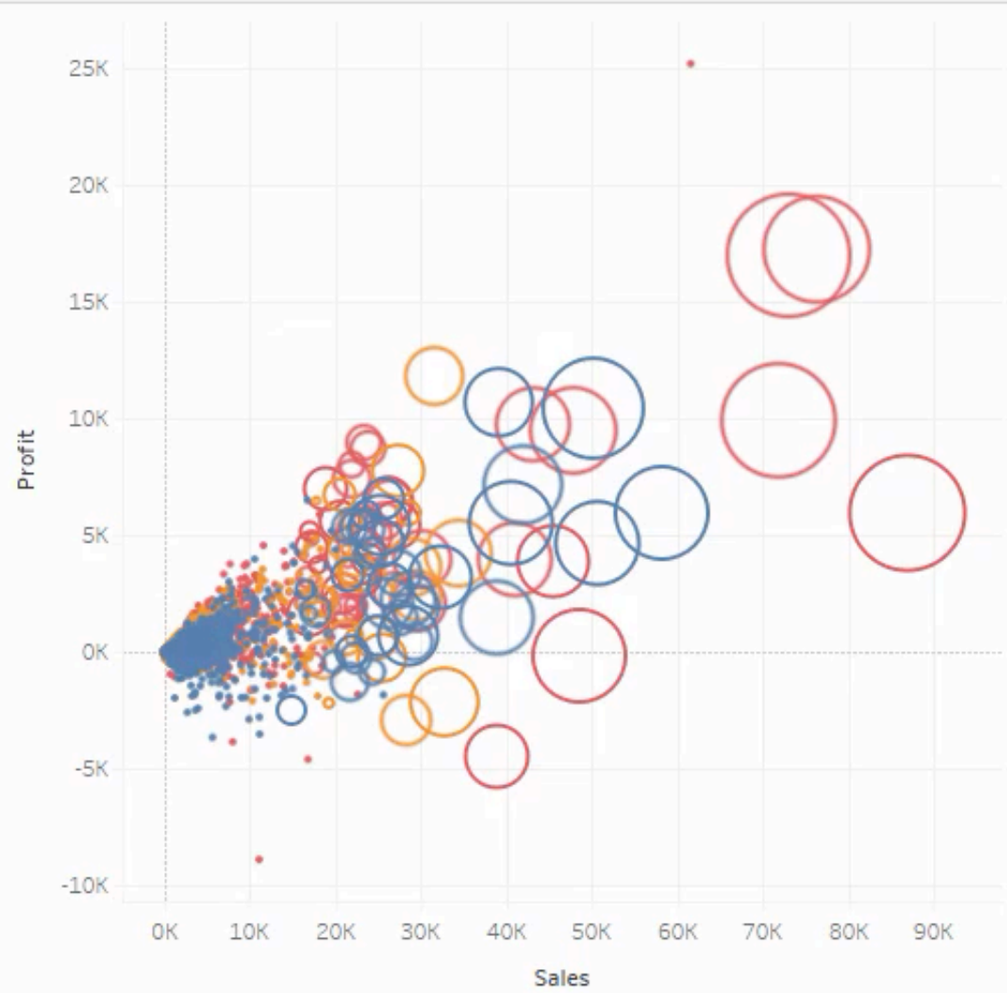
Automatic

Color | Size | Label | Detail | Tooltip | Shape

Category | SUM(Shipping ..) | Product Na..

Columns: SUM(Sales)

Rows: SUM(Profit)



Category

- Furniture
- Office Supplies
- Technology

SUM(Shipping Cost)

≤ 2,000
4,000
6,000
8,817

Data Source | Ways to Filter | Headers | Legends

3788 marks | 1 row by 1 column | SUM(Sales): 12,642,502

Filtering data in tableau - Discrete Fields

- **Select from a list of values**
  - **Exclude versus include**
  - **Use All - Comprehension**

Filtering data in tableau - Discrete Fields

- **Select from a list of values**
  - **Exclude versus include**
  - **Use All - Comprehension**
- **Wildcard (Exclude versus include)**

Filtering data in tableau - Discrete Fields

- **Select from a list of values**
  - **Exclude versus include**
  - **Use All - Comprehension**
- **Wildcard (Exclude versus include)**
- **Condition**
  - **By field**
  - **By Formula**

Filtering data in tableau - Discrete Fields

- **Select from a list of values**
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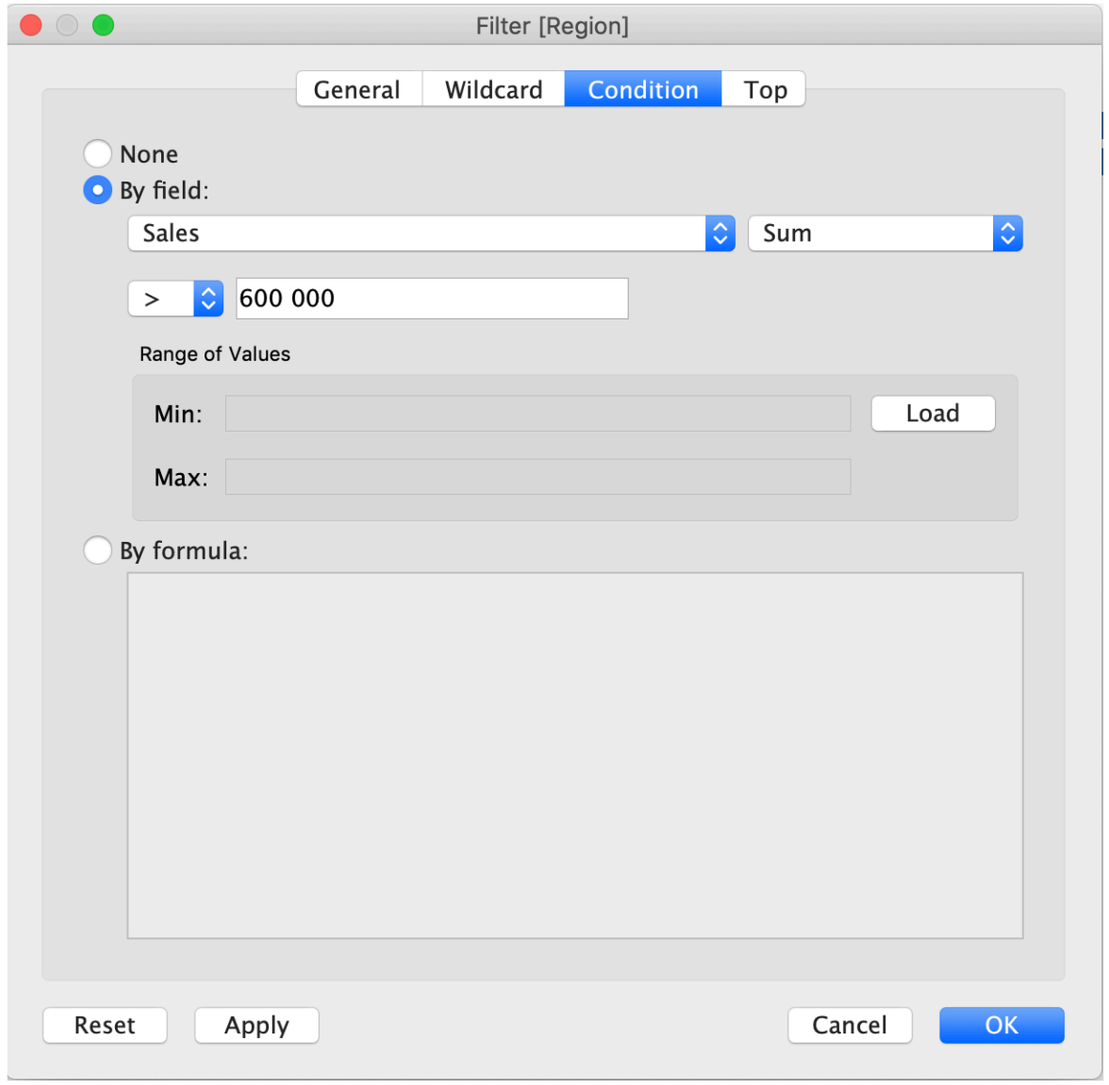
- **Wildcard (Exclude versus include)**
- **Condition**
  - **By field**
  - **By Formula**

HAVING clause

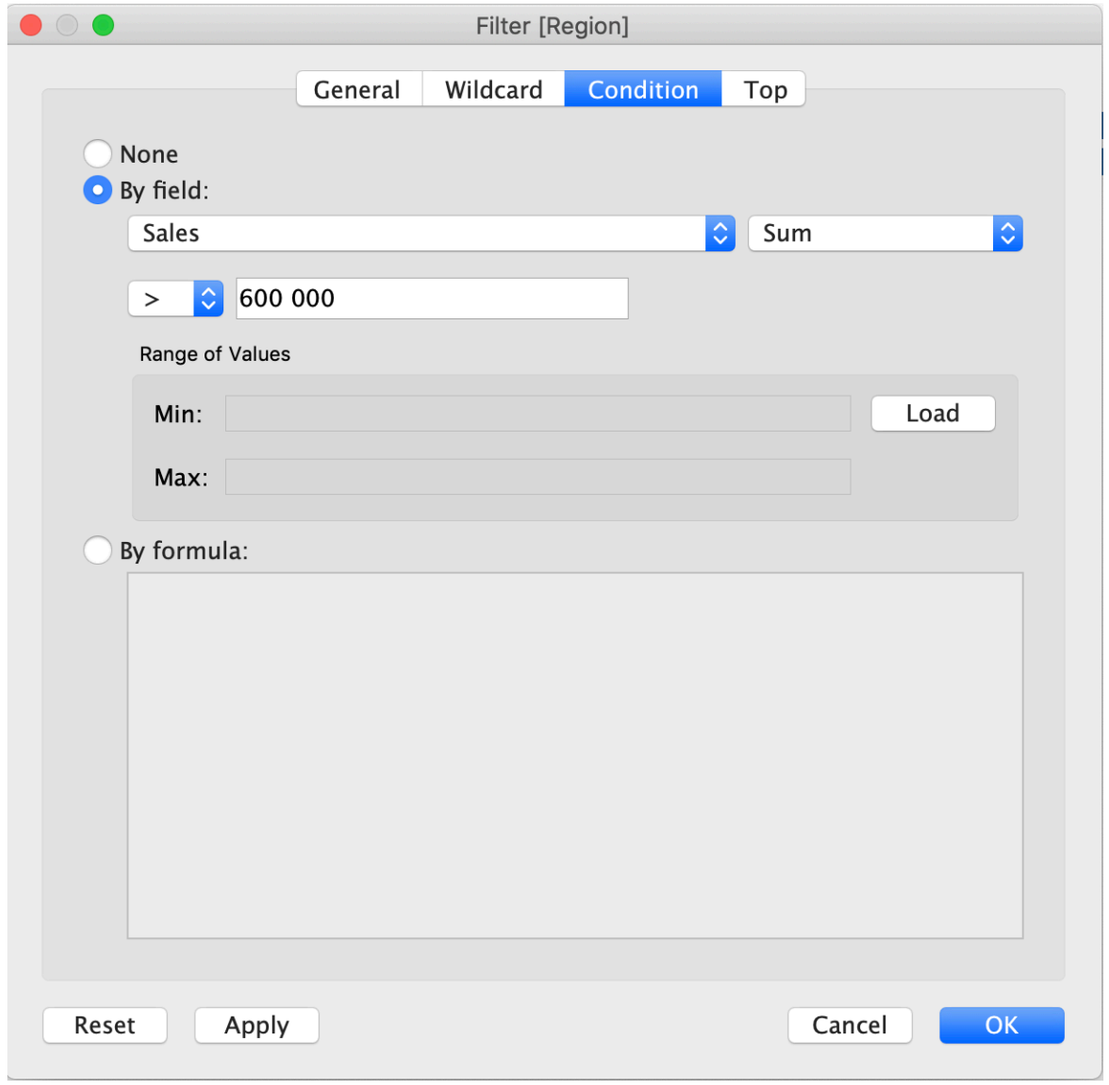


Filtering data in tableau - Discrete Fields

- **Select from a list of values**
  - **Exclude versus include**
  - **Use All - Comprehension**
- **Wildcard (Exclude versus include)**
- **Condition**
  - **By field**
  - **By Formula**

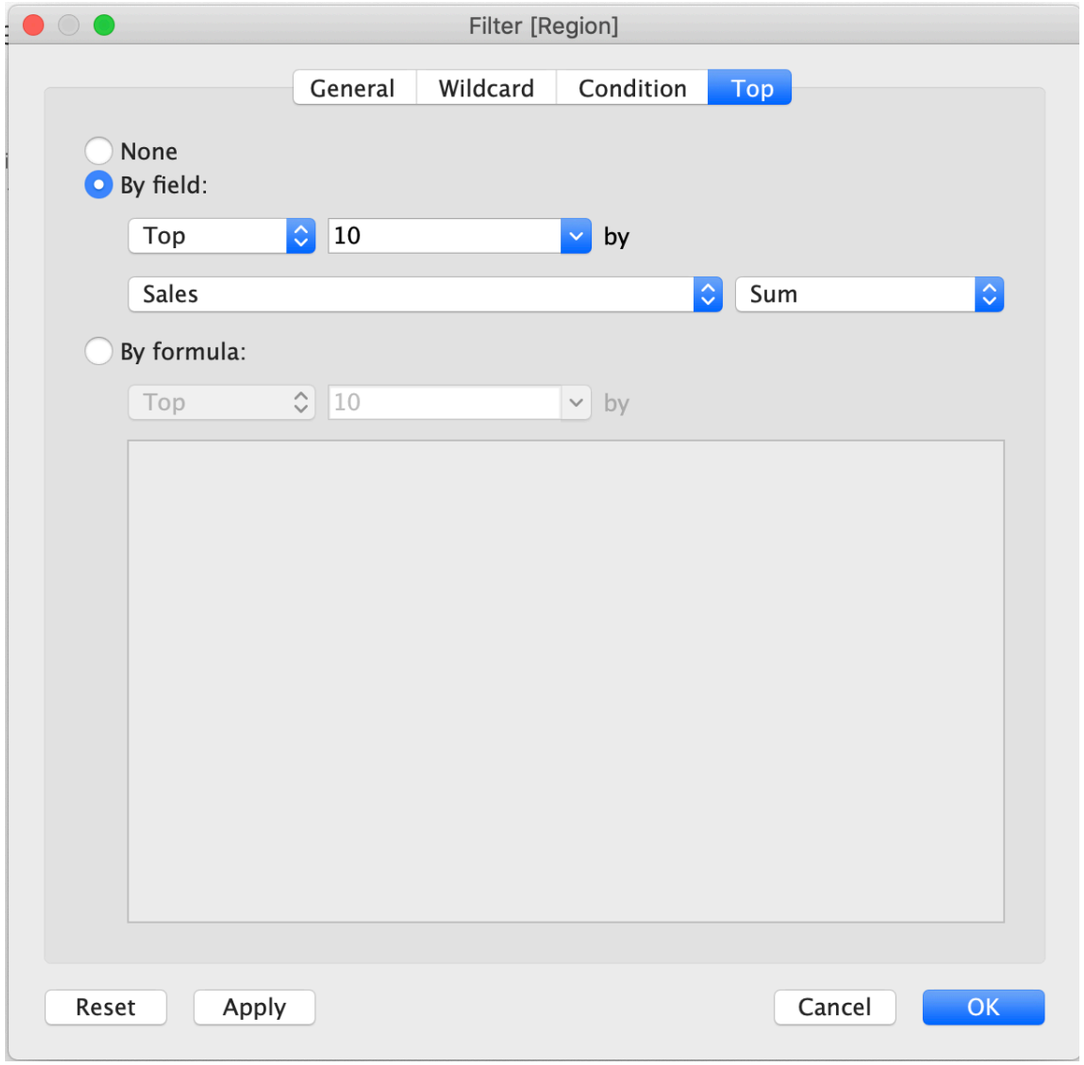
HAVING clause

Depends on the granularity of the visualization



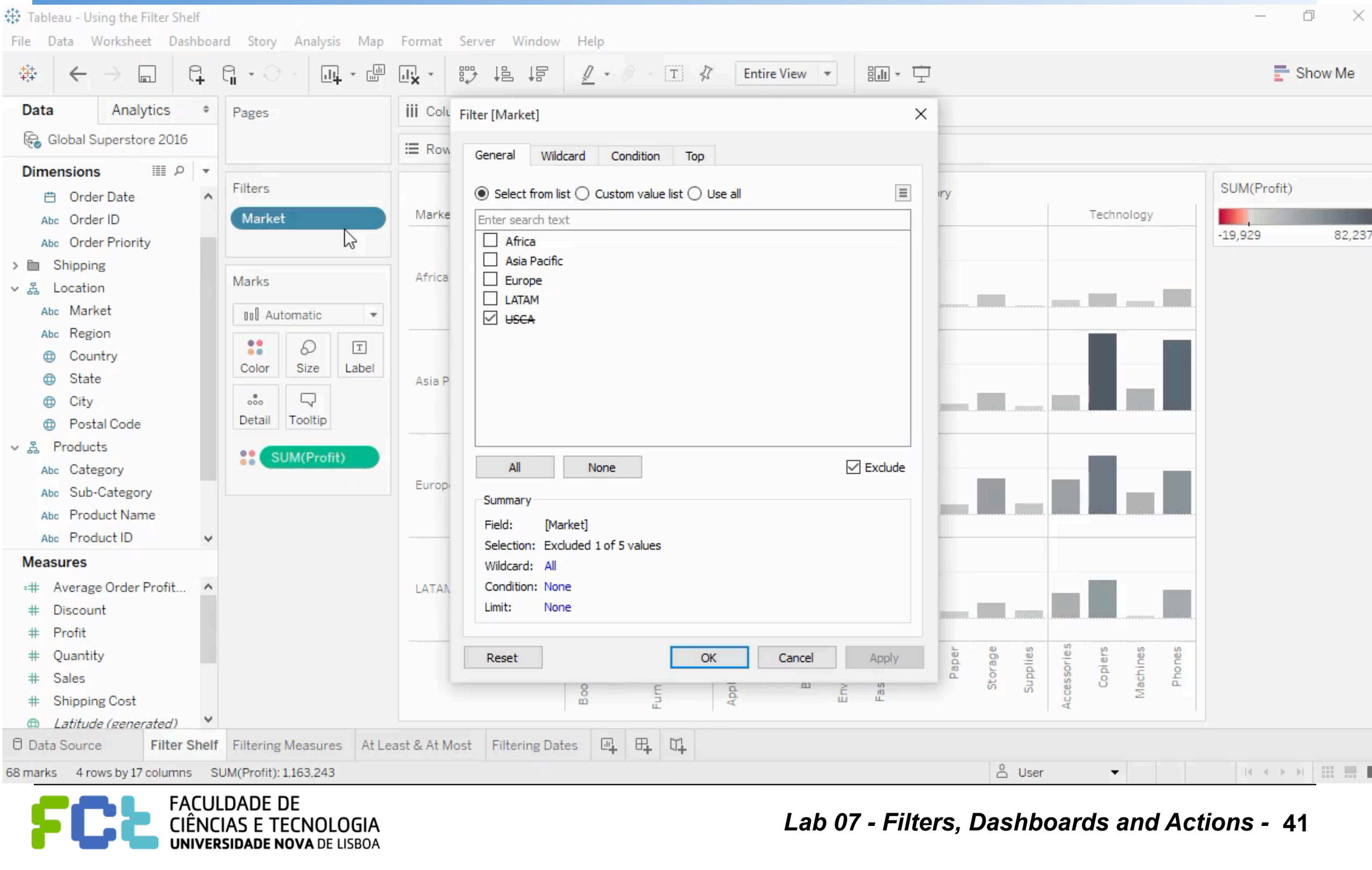
Filtering data in tableau - Discrete Fields

- **TOP**
  - **By field**
  - **By Formula**



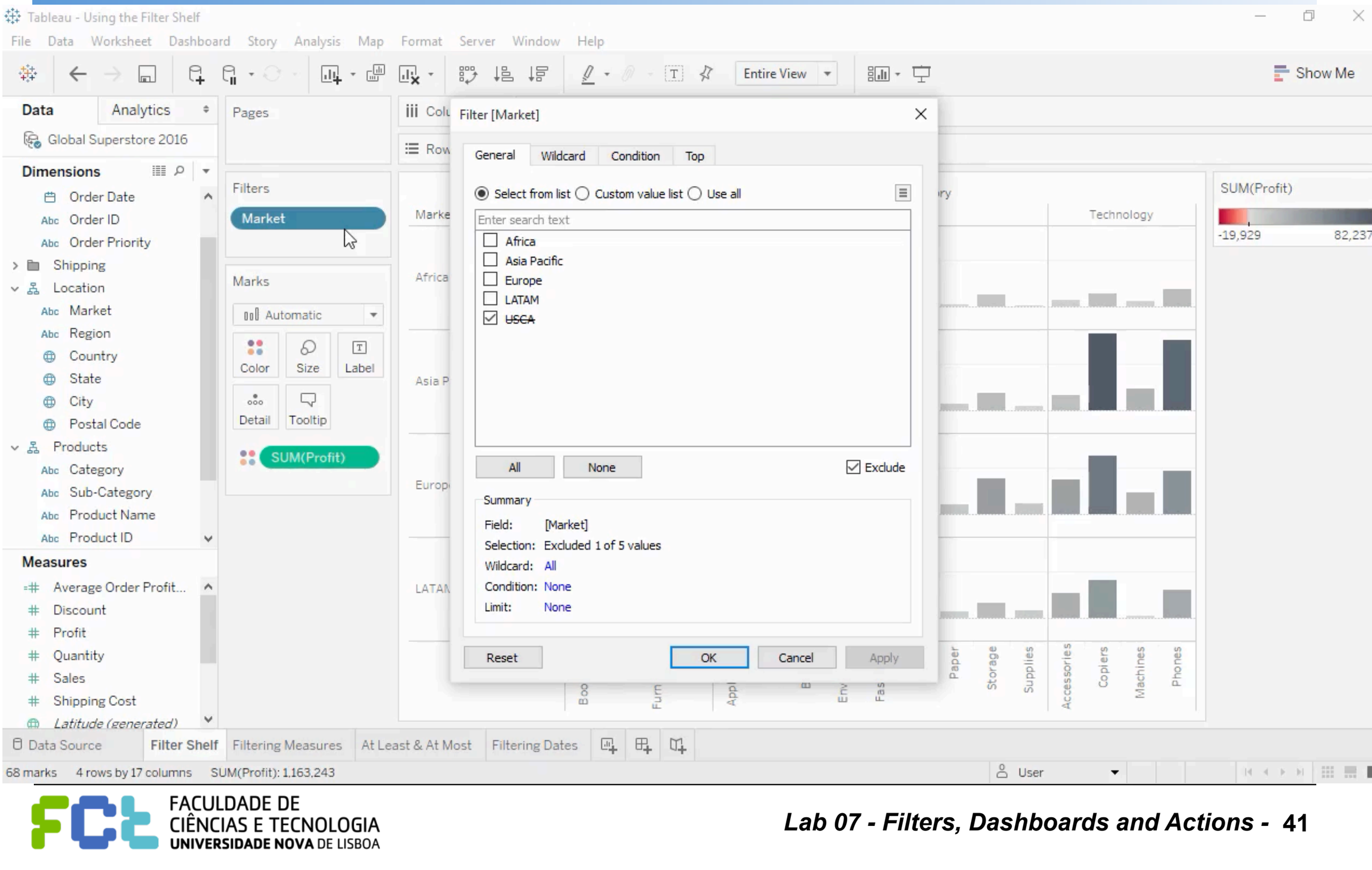
Filtering data in tableau - Discrete Fields

Link to video



Filtering data in tableau - Discrete Fields

Link to video



Filtering data in tableau - Measures

Link to video

Tableau - Using the Filter Shelf

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Entire View | Show Me

Data | Analytics

Global Superstore 2016

Dimensions

- Order Date
- Order ID
- Order Priority
- Shipping
- Location
  - Market
  - Region
  - Country
  - State
  - City
  - Postal Code
- Products
  - Category
  - Sub-Category
  - Product Name
  - Product ID

Measures

- Average Order Profit...
- Discount
- Profit
- Quantity
- Sales
- Shipping Cost
- *Latitude (generated)*

Pages

Filters: Market

Marks: Automatic

Color | Size | Label | Detail | Tooltip

SUM(Profit)

Columns: Category | Sub-Category

Rows: Market | SUM(Profit)

Category / Sub-Category

Furniture | Office Supplies | Technology

Market: Africa, Asia Pacific, Europe, LATAM

Profit: 50K, 0K

Bookcases, Chairs, Furnishings, Tables, Appliances, Art, Binders, Envelopes, Fasteners, Labels, Paper, Storage, Supplies, Accessories, Copiers, Machines, Phones

SUM(Profit): -19,929 82,237

Data Source | Filter Shelf | Filtering Measures | At Least & At Most | Filtering Dates

68 marks | 4 rows by 17 columns | SUM(Profit): 1,163,243 | User

Filtering data in tableau - Measures

Link to video

Tableau - Using the Filter Shelf

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Entire View | Show Me

Data | Analytics

Global Superstore 2016

Dimensions

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Filters: Market

Marks: Automatic

Color | Size | Label | Detail | Tooltip

SUM(Profit)

Columns: Category | Sub-Category

Rows: Market | SUM(Profit)

Category / Sub-Category

Furniture | Office Supplies | Technology

Market: Africa, Asia Pacific, Europe, LATAM

Profit: 50K, 0K

Bookcases, Chairs, Furnishings, Tables, Appliances, Art, Binders, Envelopes, Fasteners, Labels, Paper, Storage, Supplies, Accessories, Copiers, Machines, Phones

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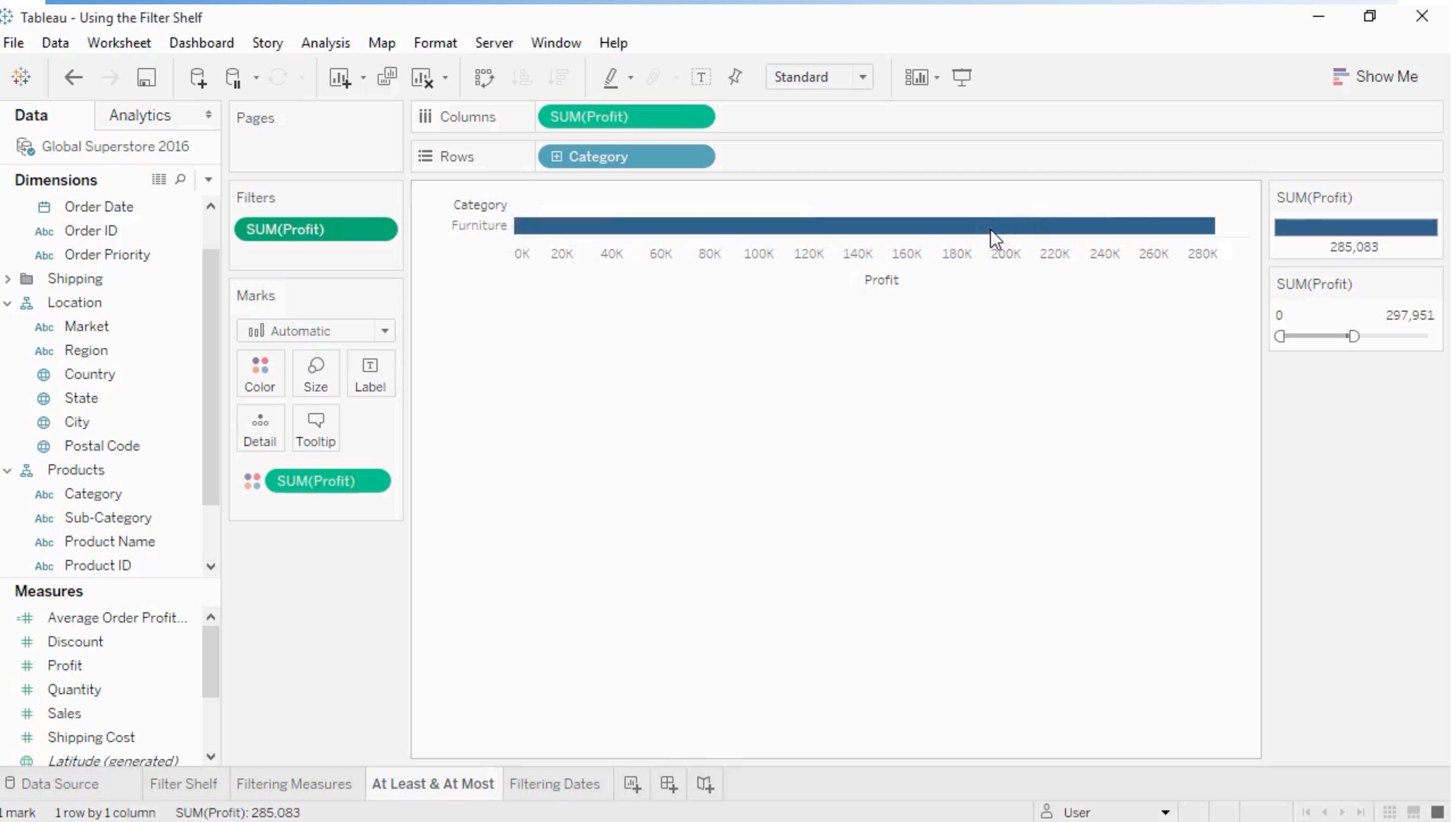
Data Source | Filter Shelf | Filtering Measures | At Least & At Most | Filtering Dates

68 marks | 4 rows by 17 columns | SUM(Profit): 1,163,243 | User

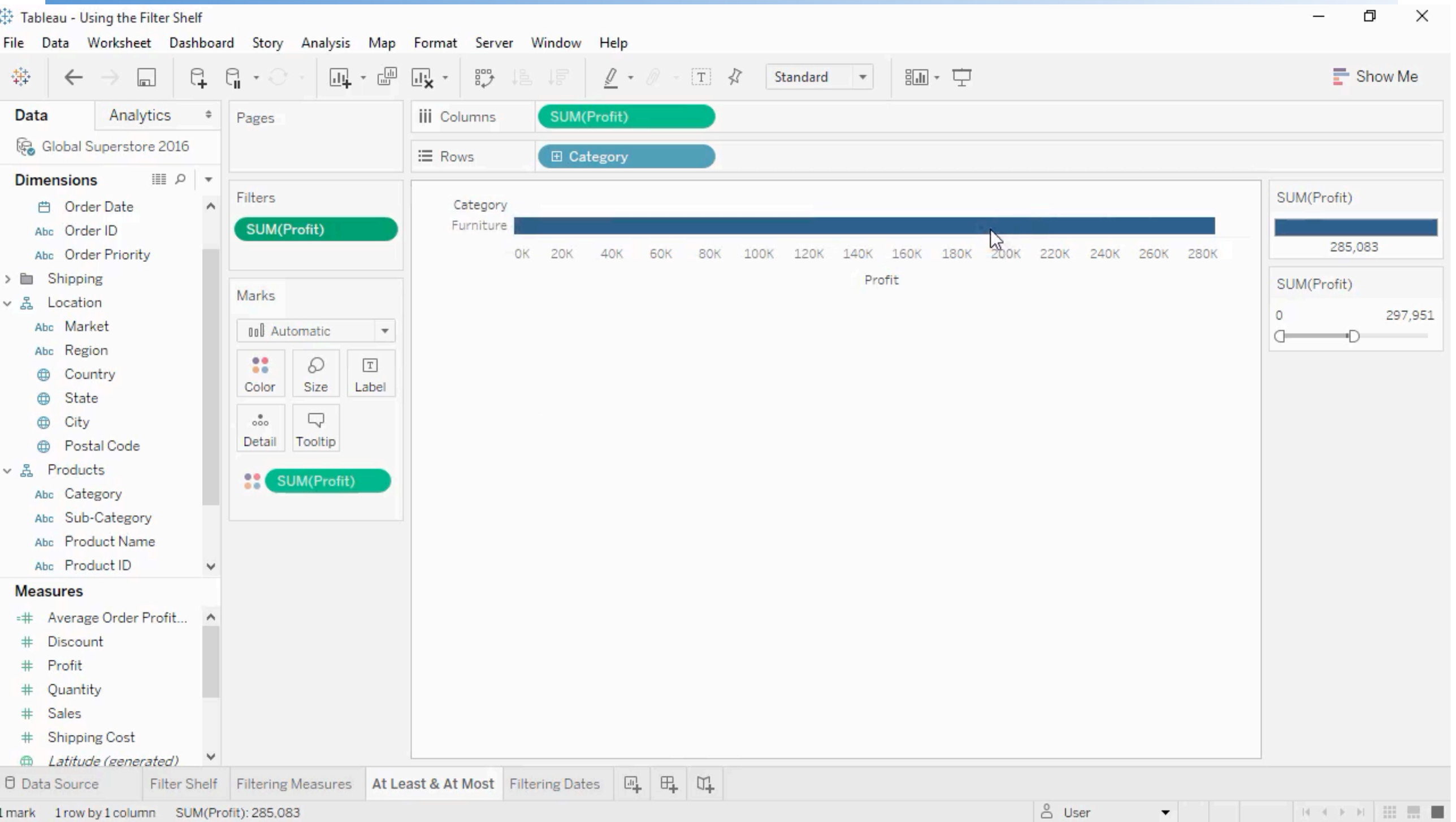
Filtering data in tableau - Dates

Link to video



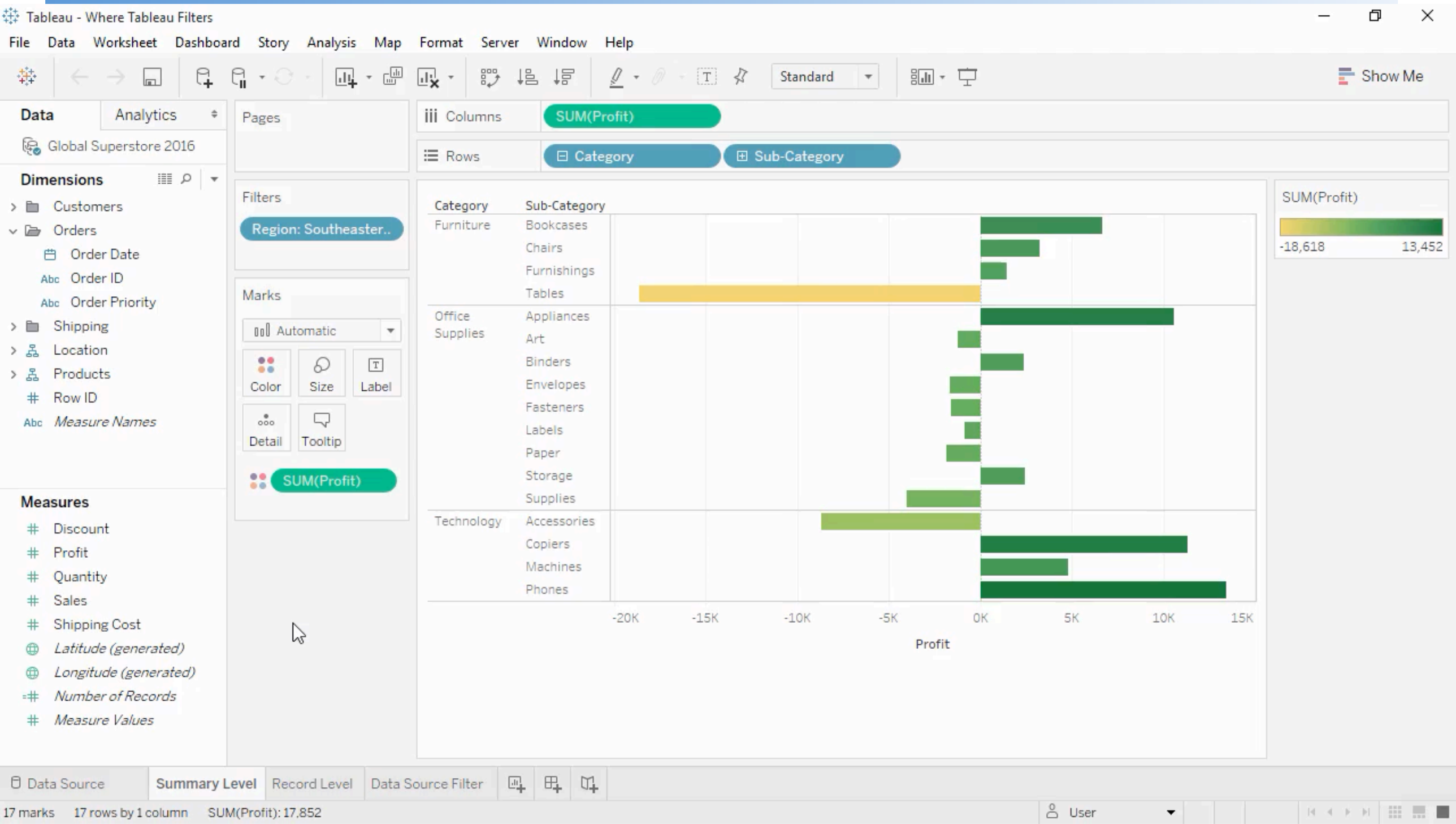
Filtering data in tableau - Dates

Link to video



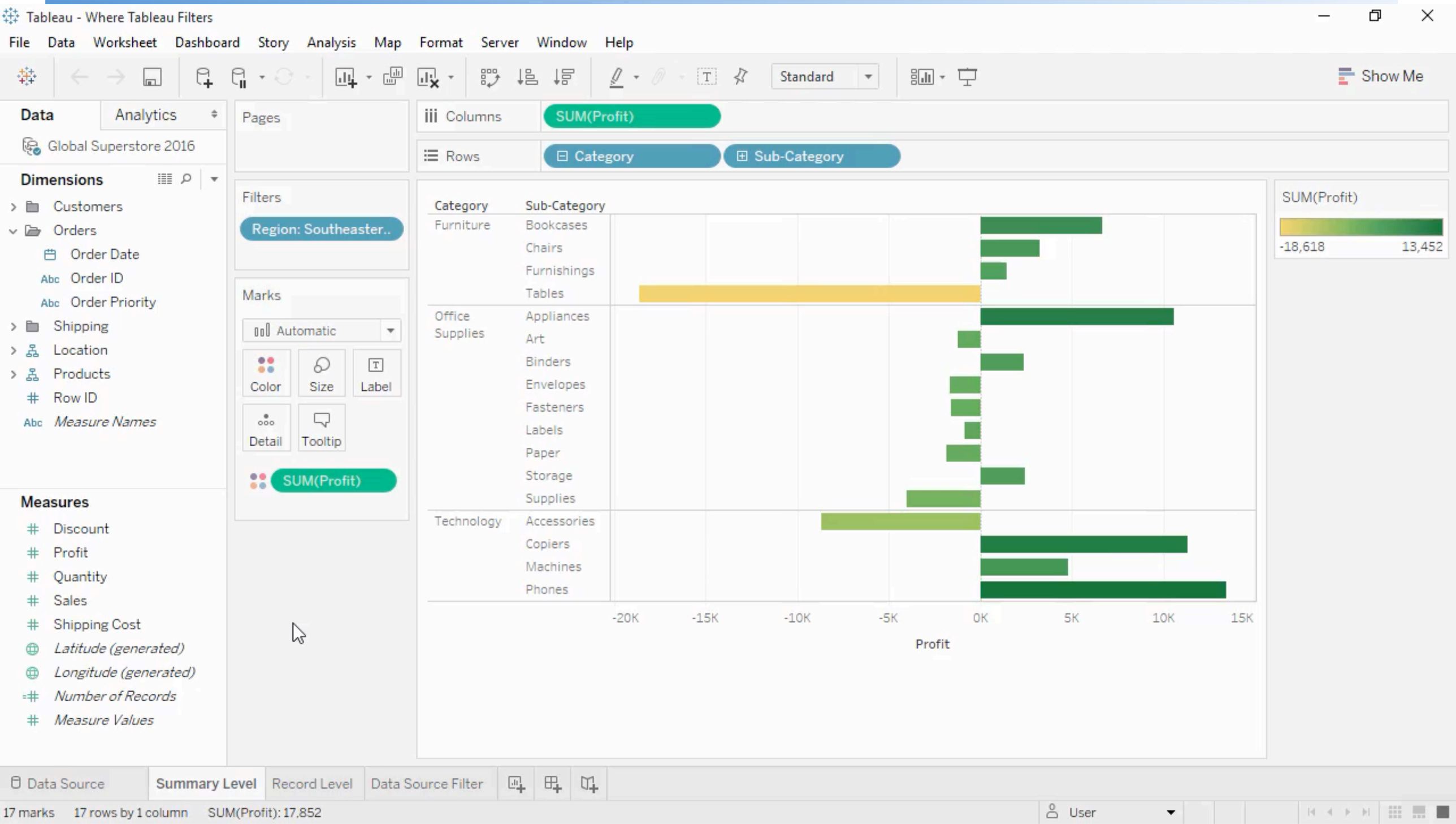
Link to video

Filtering data in tableau - Row Level versus Summary Level



Link to video

Filtering data in tableau - Row Level versus Summary Level



Filtering data in tableau - Interactive Filtering

Link to video

Tableau - Interactive Filters

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Entire View | Show Me

Data | Analytics

Global Superstore 2016

Dimensions

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  - City
  - Postal Code
- Products
  - Category
  - Sub-Category
  - Product Name
  - Product ID
- Row ID
- *Measure Names*

Measures

- Discount
- Profit
- Quantity
- Sales
- Shipping Cost

Pages

Filters: Category

Marks: Automatic

Color | Size | Label | Detail | Tooltip

SUM(Profit)

Columns: Market | SUM(Sales)

Rows: Order Priority | Category | Sub-Category

Market

Order Priority	Category	Sub-Category	Asia Pacific	Europe	LATAM	USCA
Critical	Furniture	Bookcases				
		Chairs				
		Tables				
		Furnishings				
	Technology	Phones				
		Copiers				
		Machines				
		Accessories				
High	Furniture	Bookcases				
		Chairs				
		Tables				
		Furnishings				
	Technology	Phones				
		Copiers				
		Machines				
		Accessories				
Medium	Furniture	Bookcases				
		Chairs				
		Tables				
		Furnishings				
	Technology	Phones				
		Copiers				
		Machines				
		Accessories				
Low	Furniture	Bookcases				
		Chairs				
		Tables				
		Furnishings				
	Technology	Phones				
		Copiers				
		Machines				
		Accessories				

0K 100K 200K 300K — Sales | Sales | Sales | Sales

SUM(Profit): -15,061 … 45,182

Data Source | Interactive Filters | Layout Modes | Cascading Interactive Filters

126 marks | 32 rows by 4 columns | SUM(Sales): 8,337,992 | Lari McEdward

Filtering data in tableau - Interactive Filtering

Link to video

Tableau - Interactive Filters

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

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Data | Analytics

Global Superstore 2016

Dimensions

- Customers
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- Shipping
- Location
  - Market
  - Region
  - Country
  - State
  - City
  - Postal Code
- Products
  - Category
  - Sub-Category
  - Product Name
  - Product ID
- Row ID
- *Measure Names*

Measures

- Discount
- Profit
- Quantity
- Sales
- Shipping Cost

Pages

Filters: Category

Marks: Automatic

Color | Size | Label | Detail | Tooltip

SUM(Profit)

Columns: Market | SUM(Sales)

Rows: Order Priority | Category | Sub-Category

Market

Order Priority	Category	Sub-Category	Asia Pacific	Europe	LATAM	USCA
Critical	Furniture	Bookcases				
		Chairs				
		Tables				
		Furnishings				
	Technology	Phones				
		Copiers				
		Machines				
		Accessories				
High	Furniture	Bookcases				
		Chairs				
		Tables				
		Furnishings				
	Technology	Phones				
		Copiers				
		Machines				
		Accessories				
Medium	Furniture	Bookcases				
		Chairs				
		Tables				
		Furnishings				
	Technology	Phones				
		Copiers				
		Machines				
		Accessories				
Low	Furniture	Bookcases				
		Chairs				
		Tables				
		Furnishings				
	Technology	Phones				
		Copiers				
		Machines				
		Accessories				

0K 100K 200K 300K — Sales | Sales | Sales | Sales

SUM(Profit): -15,061 … 45,182

Data Source | Interactive Filters | Layout Modes | Cascading Interactive Filters

126 marks | 32 rows by 4 columns | SUM(Sales): 8,337,992 | Lari McEdward

Sorting data in tableau

SORT

Link to video

Tableau - Sorting

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Standard | Show Me

Data | Analytics

Global Superstore 2018

Dimensions

- Customers
- Orders
- Shipping
- Location
- Products
- Row ID
- *Measure Names*

Measures

- Discount
- Profit
- Quantity
- Sales
- Shipping Cost
- *Latitude (generated)*
- *Longitude (generated)*
- *Number of Records*
- *Measure Values*

Pages

Filters

Marks

Automatic

Color | Size | Label | Detail | Tooltip

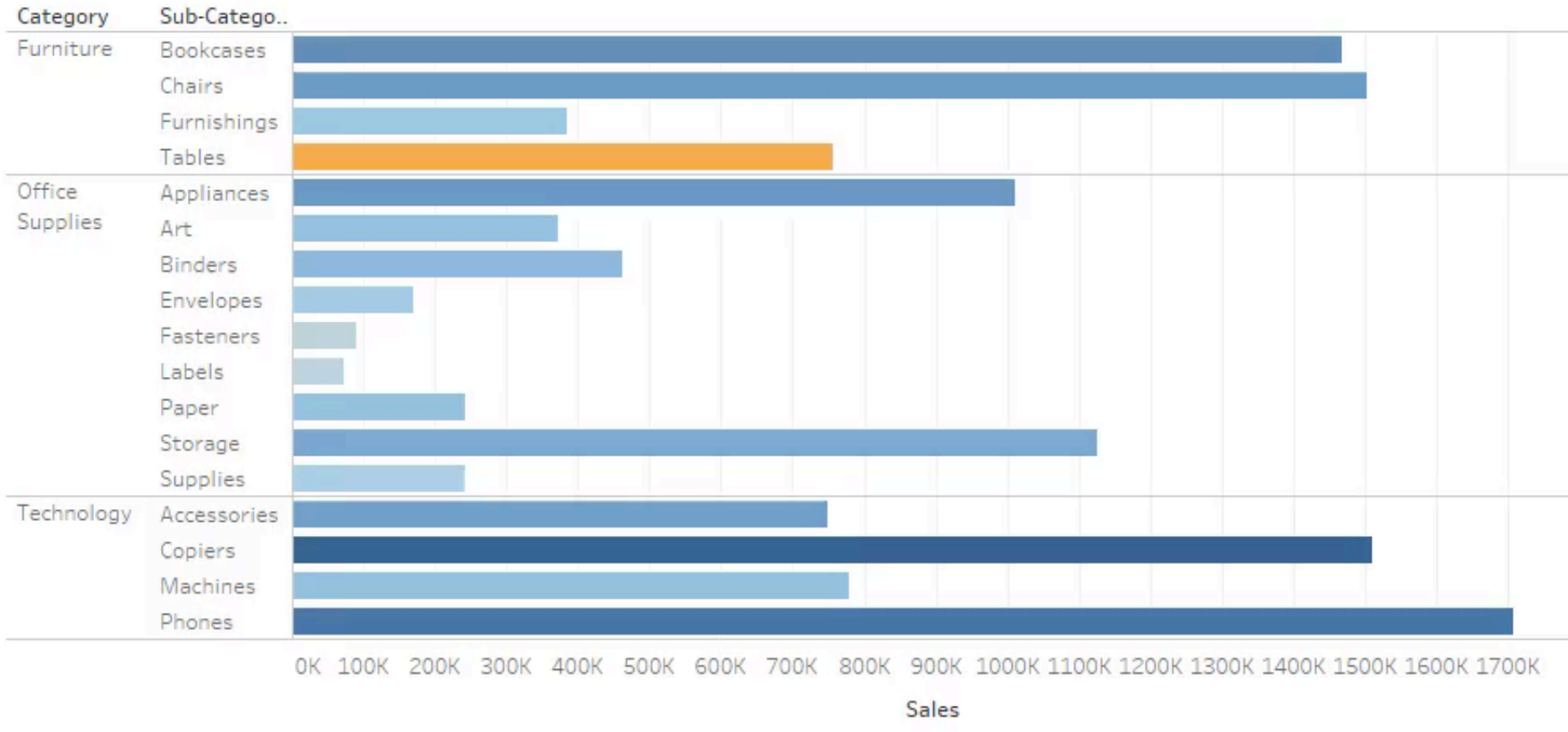
SUM(Profit)

SUM(Profit)

-64,083 258,568

Columns: SUM(Sales)

Rows: Category | Sub-Category



Data Source | Quick Sort | Field Labels | Headers/Legend | Sorting from the Pill | Nested Sort1 | Nested Sort2 | Types of Sorting

17 marks 17 rows by 1 column SUM(Sales): 12,642,502

SORT

Link to video

Tableau - Sorting

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Standard | Show Me

Data | Analytics

Global Superstore 2018

Dimensions

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Measures

- Discount
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- *Measure Values*

Pages

Filters

Marks

Automatic

Color | Size | Label | Detail | Tooltip

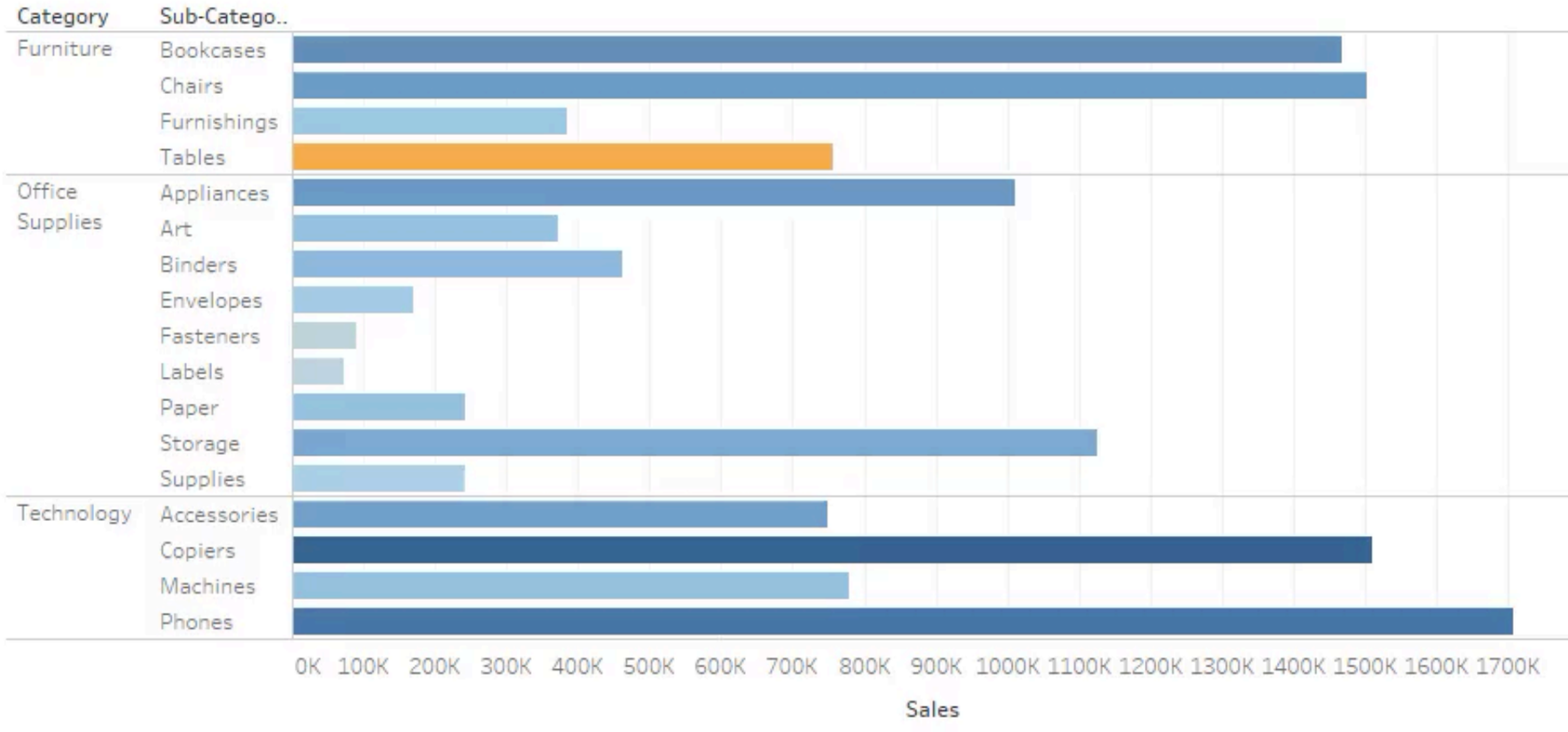
SUM(Profit)

SUM(Profit)

-64,083 258,568

Columns: SUM(Sales)

Rows: Category | Sub-Category



Data Source | Quick Sort | Field Labels | Headers/Legend | Sorting from the Pill | Nested Sort1 | Nested Sort2 | Types of Sorting

17 marks 17 rows by 1 column SUM(Sales): 12,642,502

Sorting data in tableau

- **Sorting on the Axis**
- **Sort by labels**
  - **Alphabetic ou by the available measures in the view**
- **Sorting by pill and toolbar Sort Button**
- **Custom sort**
  - **Lengend; Table Labels**
- **Sort a discreet value by ….. (feedback visual)**
- **Clear Sorts**
- **Sort by field name versus axis (nested sorted)**

Sorting data in tableau

Default Sort

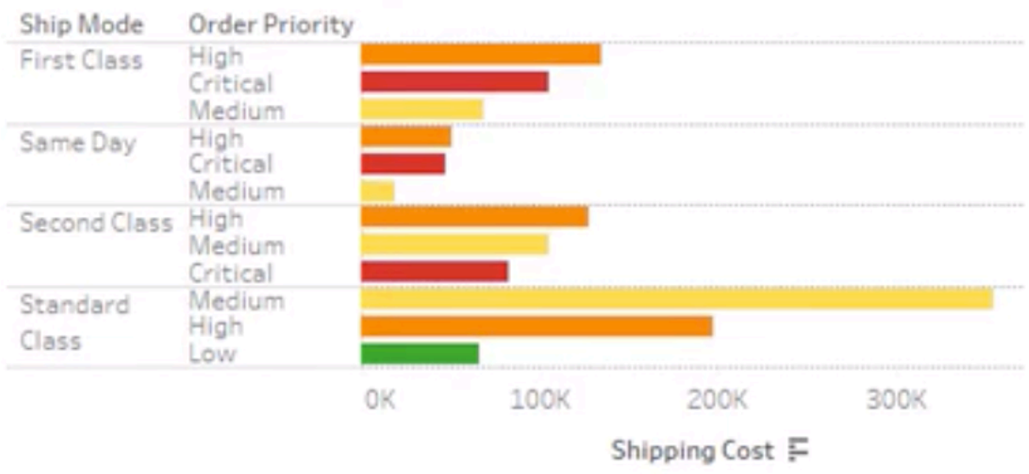
Ship Mode and Order Priority both have their default sort.
Shipping cost doesn't factor into the sorting at all. This is the behavior that occurs before a specific sort is applied to the view (usually alphabetic - ascending).

Comparative Sort

Ship Mode and Order Priority have both been sorted by SUM(Shipping Cost).
Each ship mode pane shows the same ordering of order priorities. Medium priority is first in every pane because it is the highest cost overall.

Nested Sort

The sort was set by the quick sorting on the axis for Shipping Cost.
Each pane was independently sorted such that the longest bar *for that pane* is at the top, regardless of what's happening in any other pane.

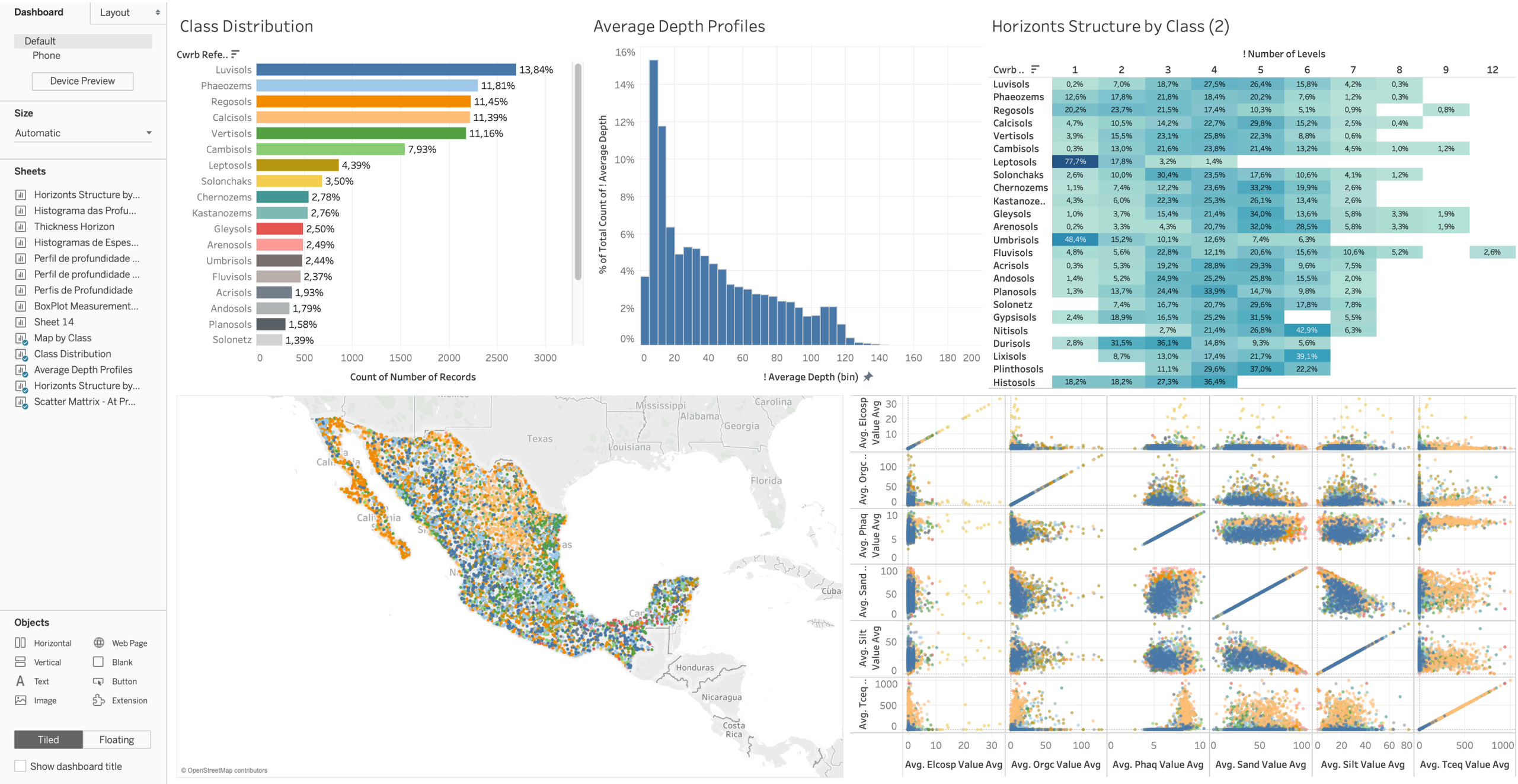


Manual Sort

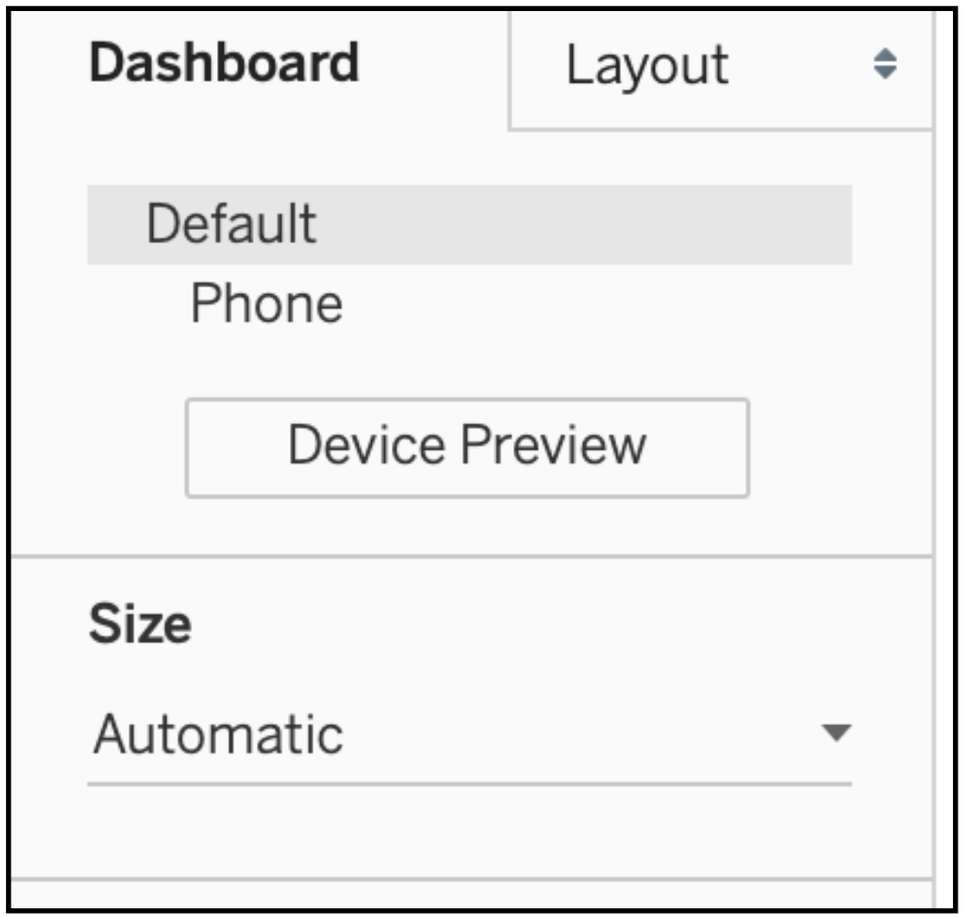
Each field was manually sorted into its real-world order.
Ship Mode was sorted so Same Day is above First Class. Order Priority was sorted so Low is below Medium.

Dashboards

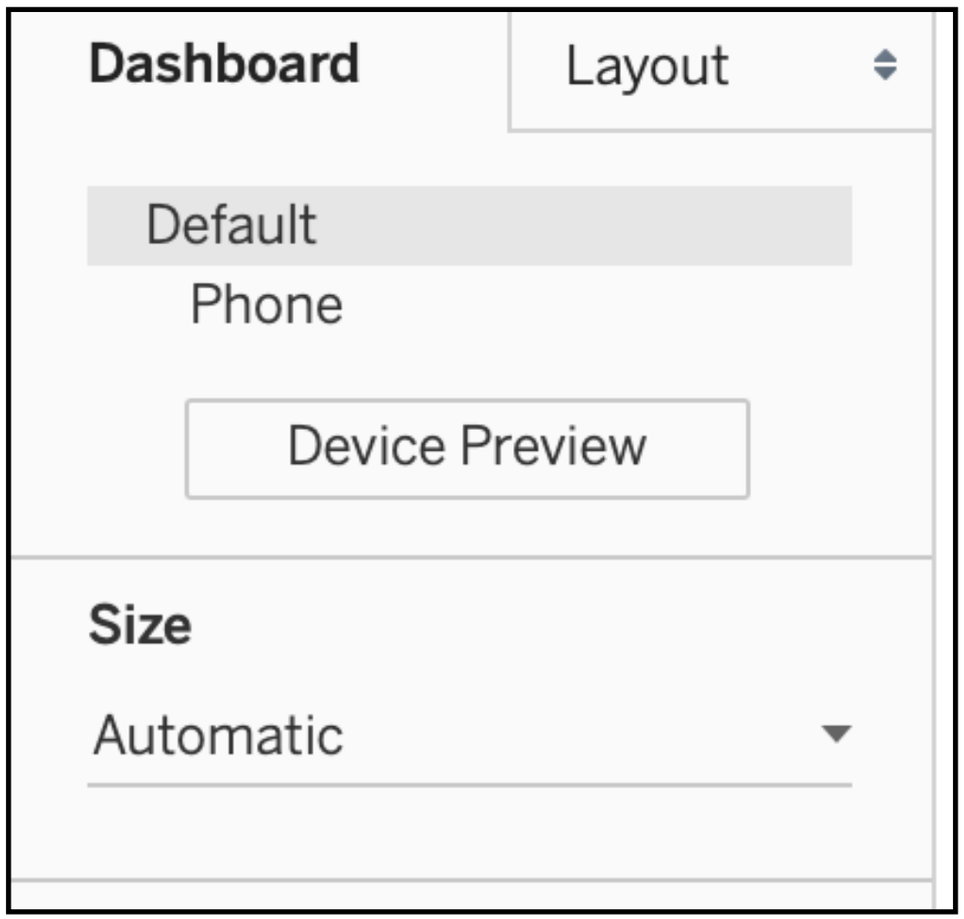
Dashboards - Design

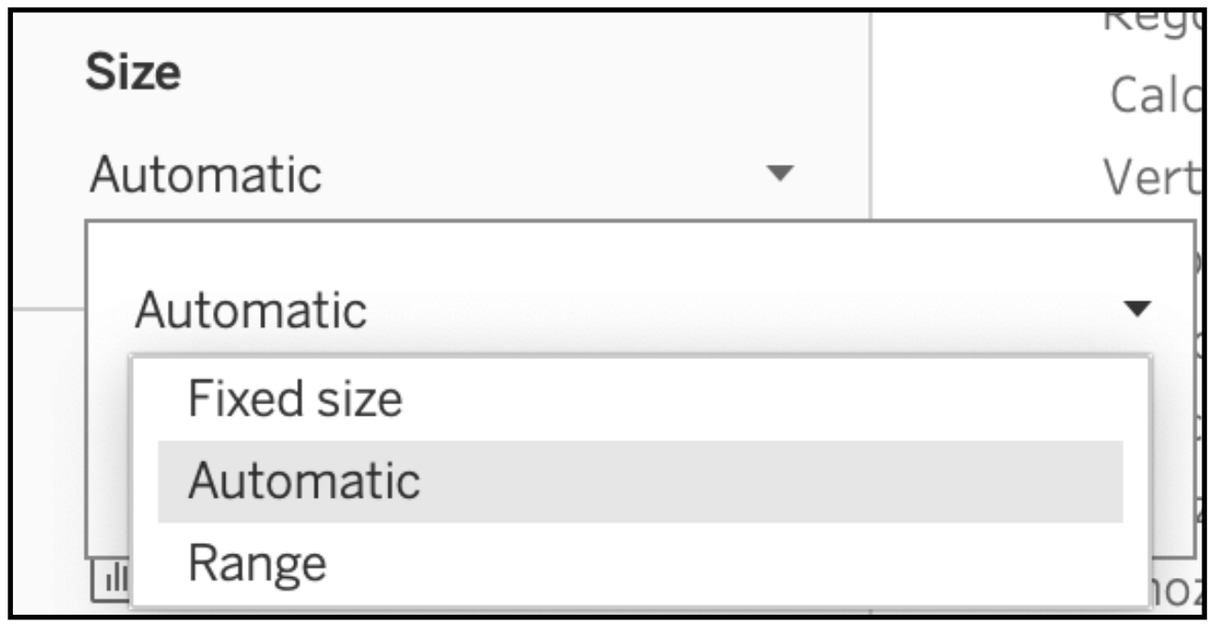


Dashboards - Design - Set the size



Dashboards - Design - Set the size





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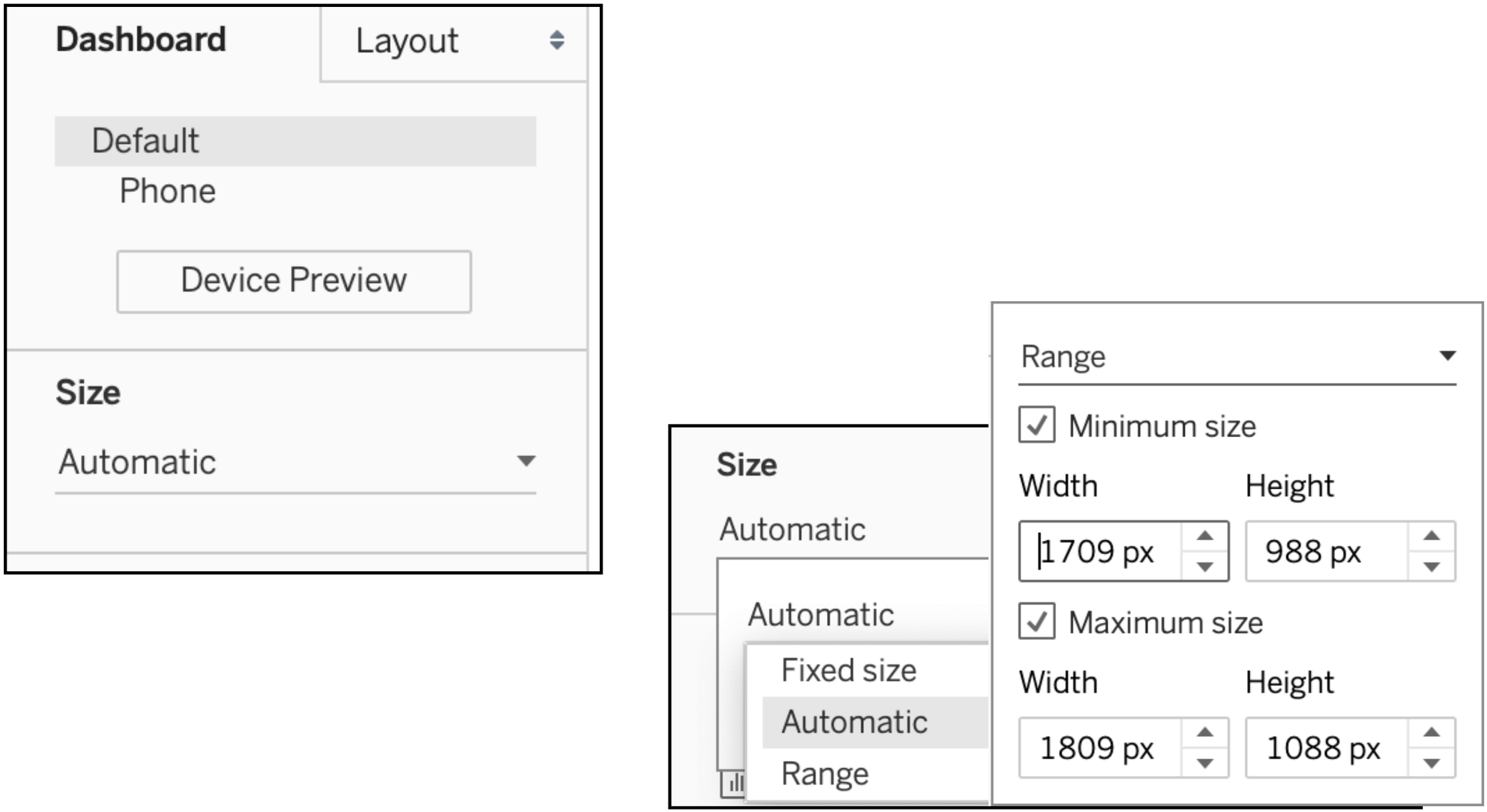
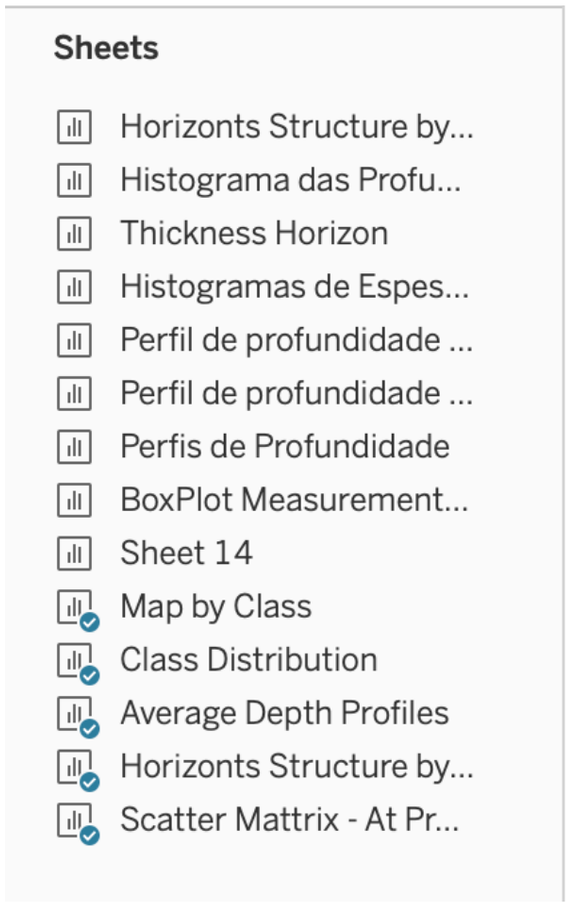


Dashboards - Design



Dashboards - Design

Sheets

- Horizonts Structure by...
- Histograma das Profu...
- Thickness Horizon
- Histogramas de Espes...
- Perfil de profundidade ...
- Perfil de profundidade ...
- Perfis de Profundidade
- BoxPlot Measurement...
- Sheet 14
- Map by Class
- Class Distribution
- Average Depth Profiles
- Horizonts Structure by...
- Scatter Mattrix - At Pr...

Dashboards - Design

Sheets

- Horizonts Structure by...
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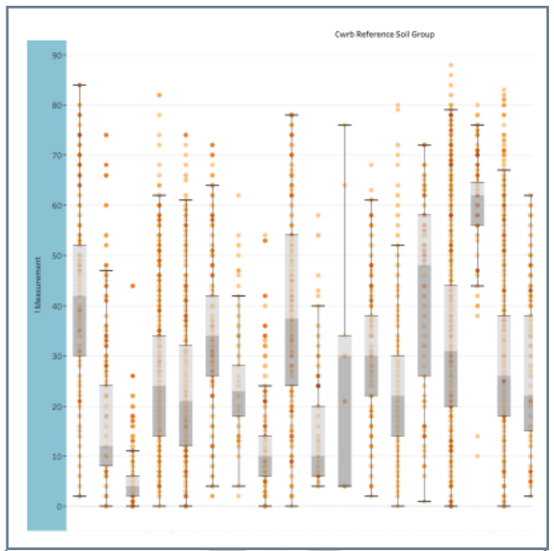
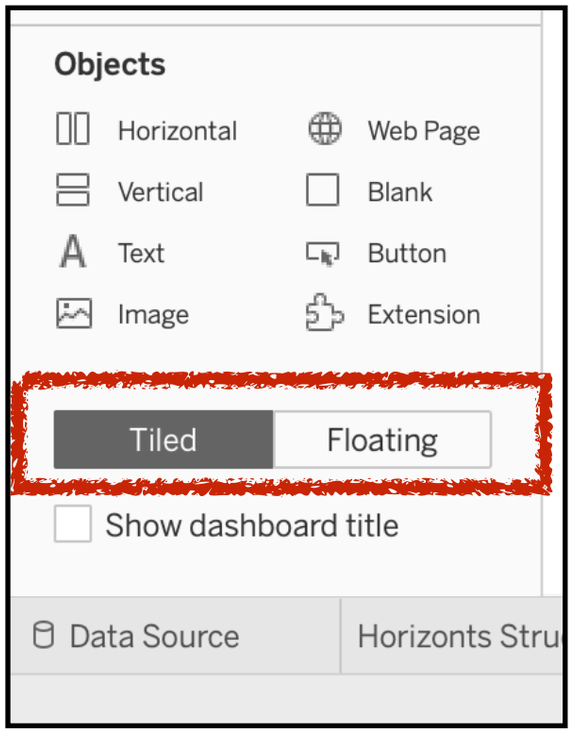
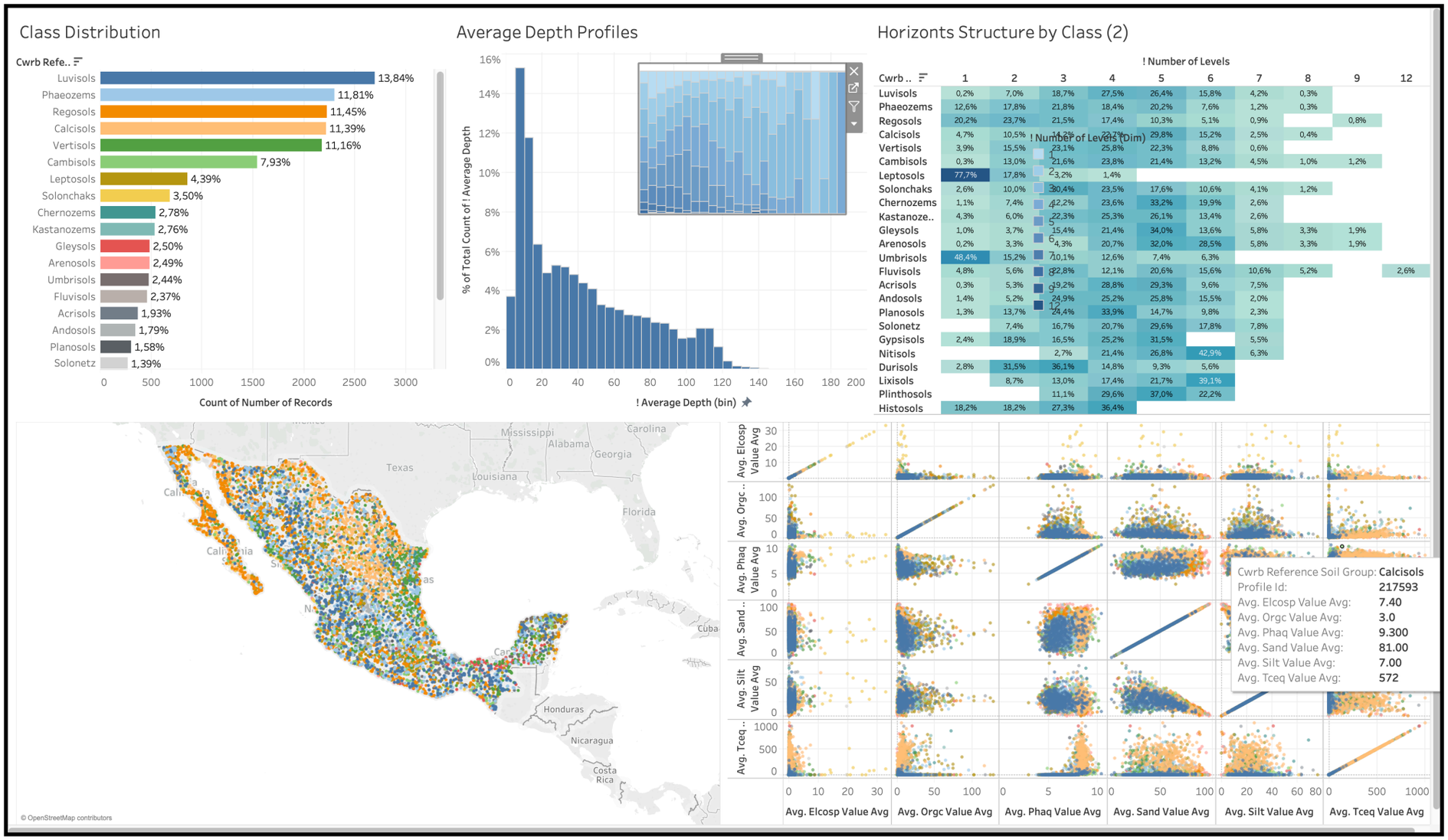
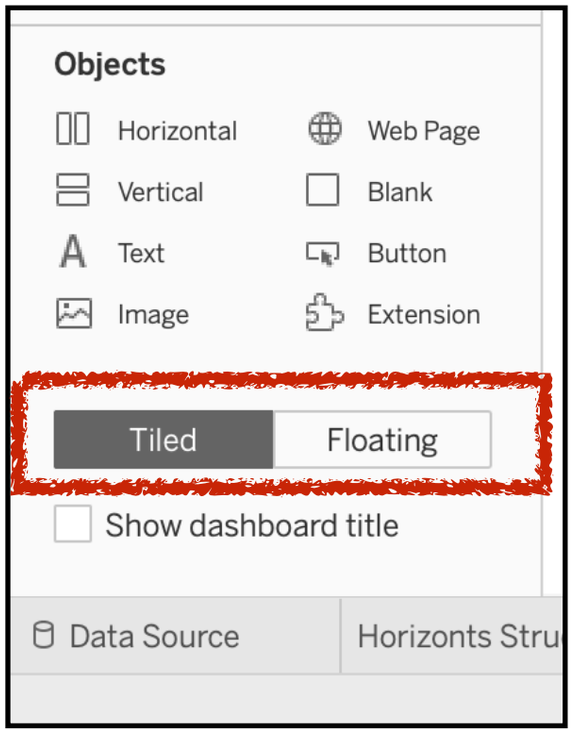


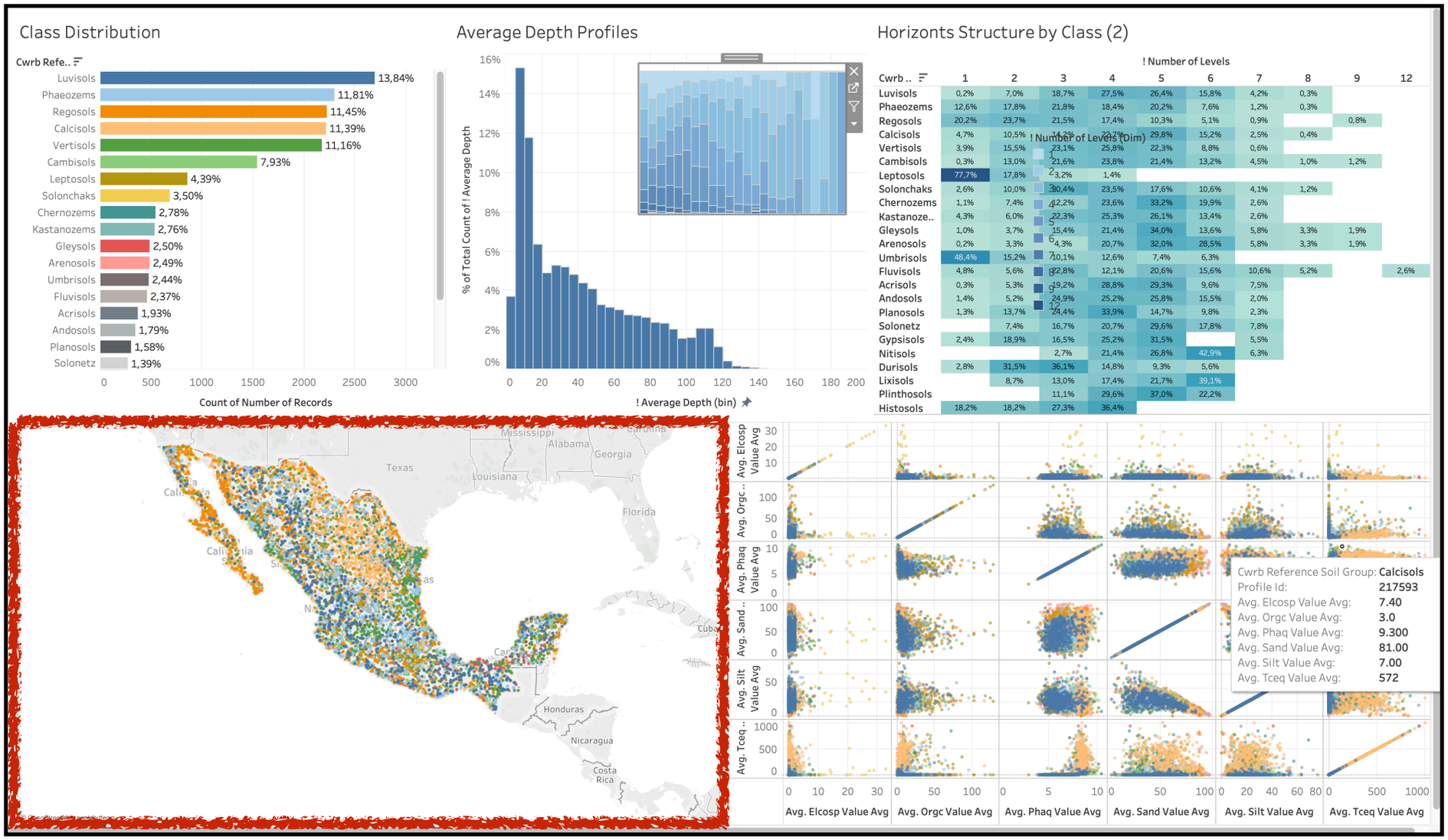
Dashboards - Design



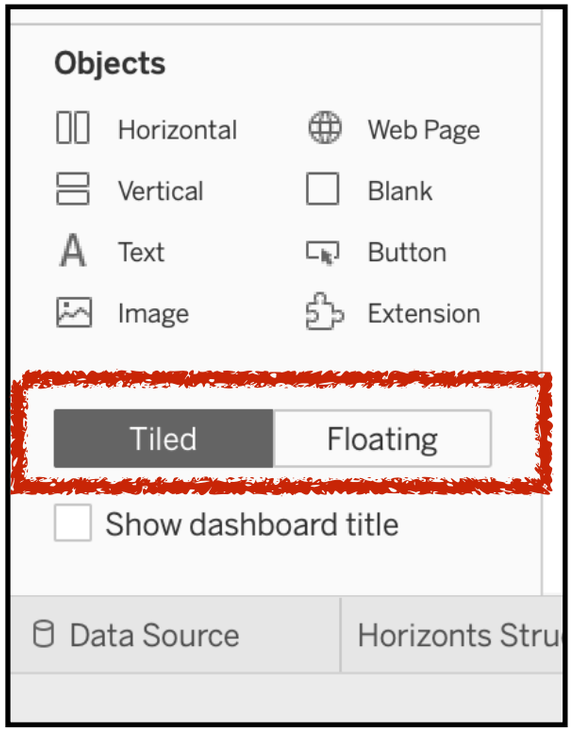


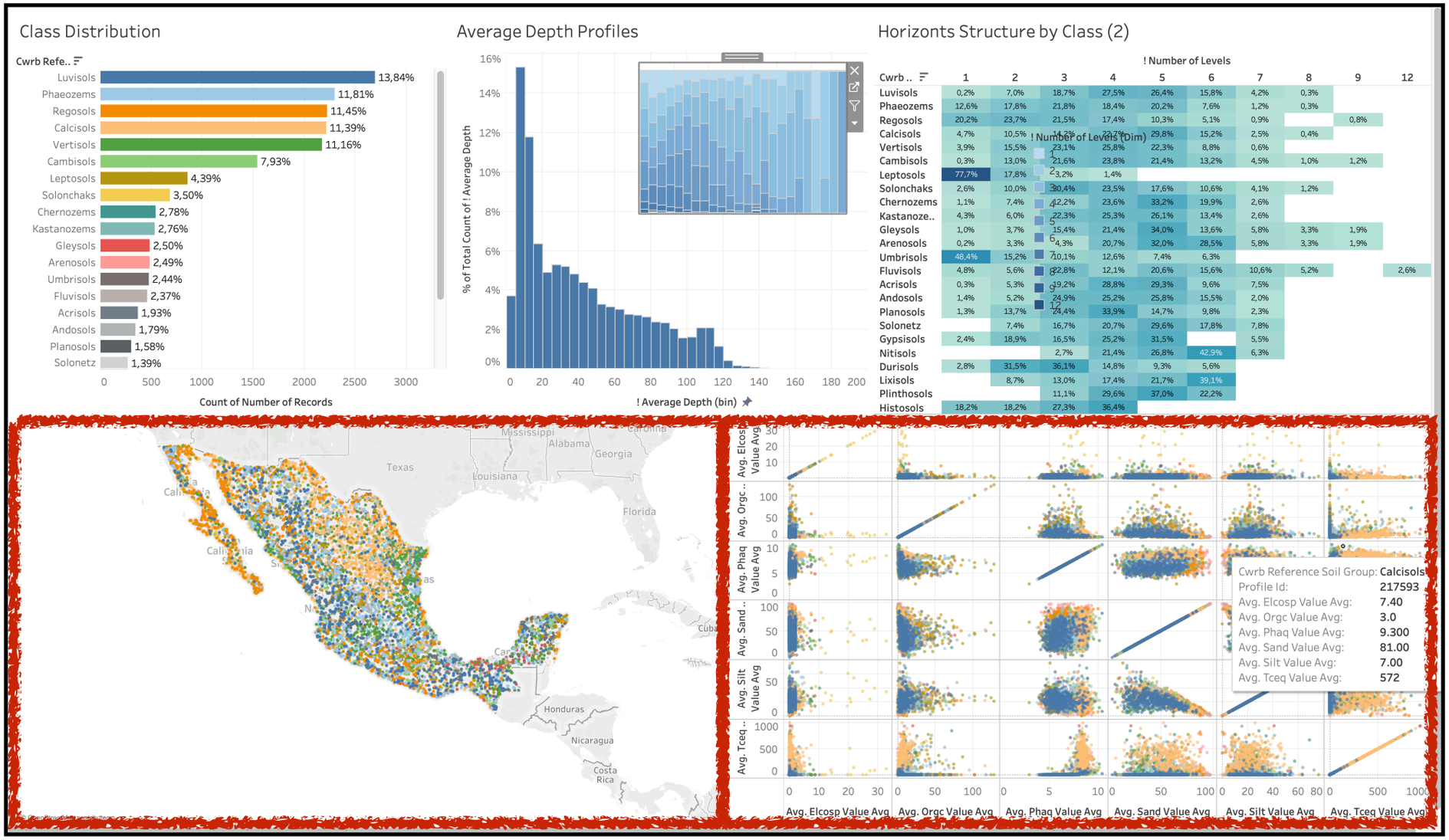
Dashboards - Design





Dashboards - Design





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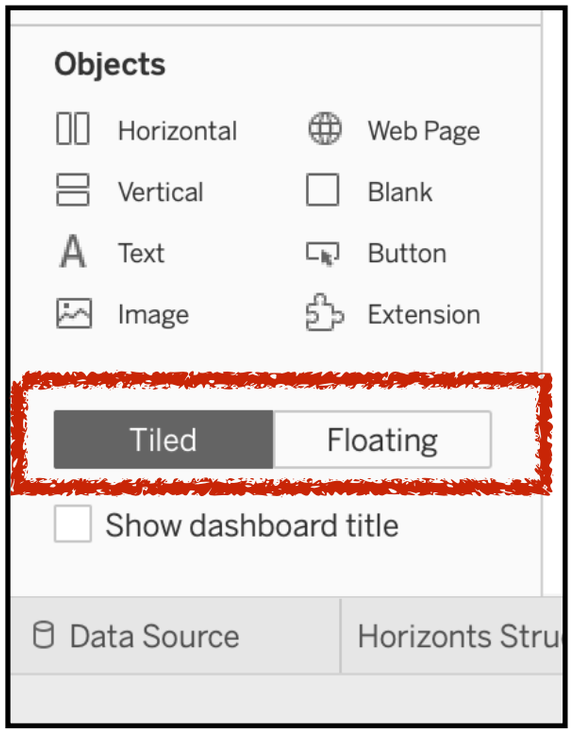
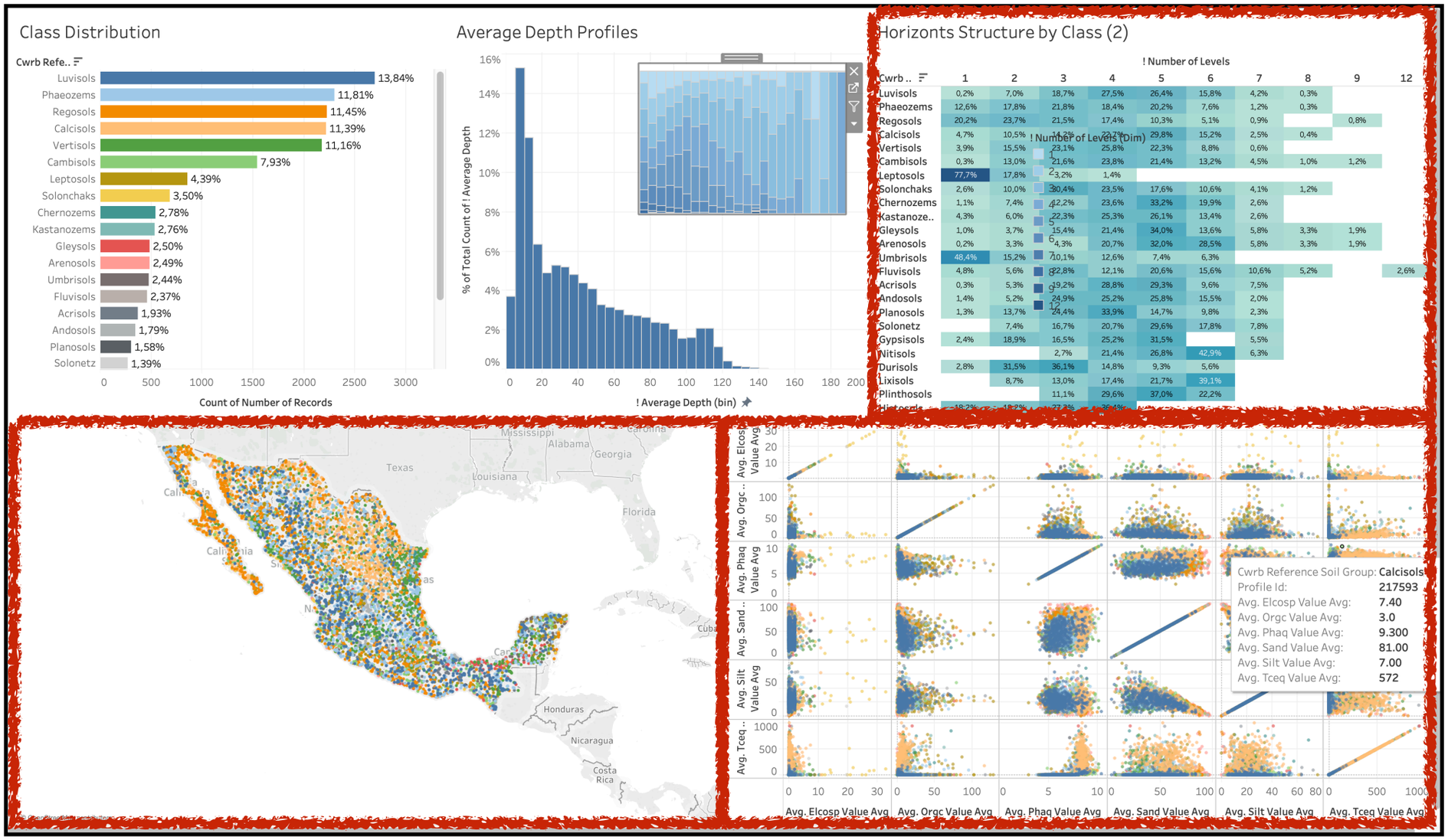
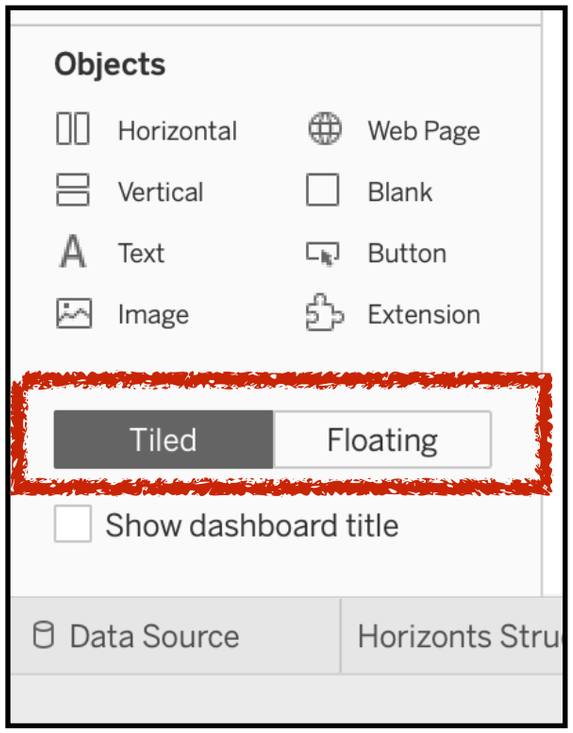
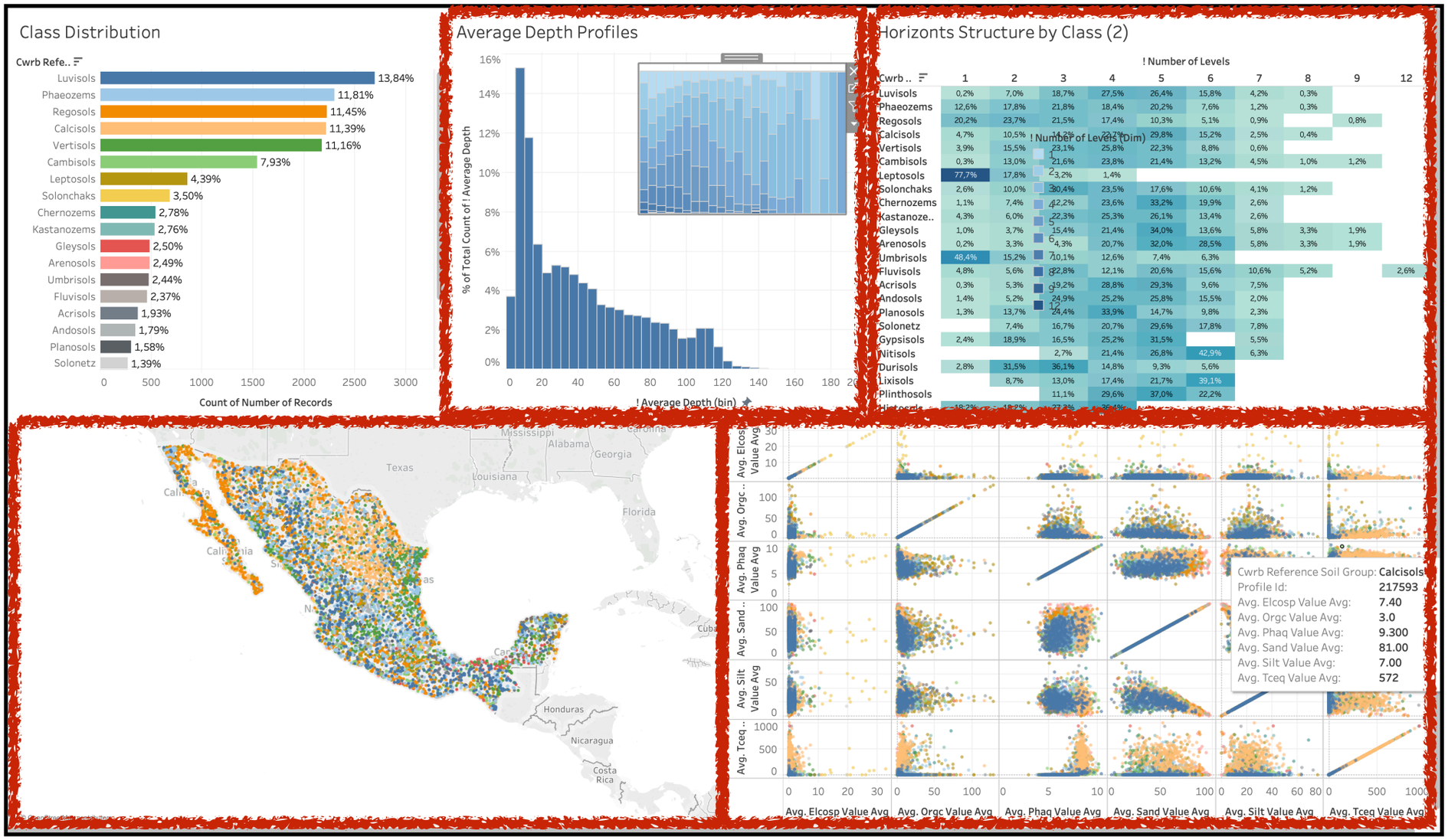




Dashboards - Design





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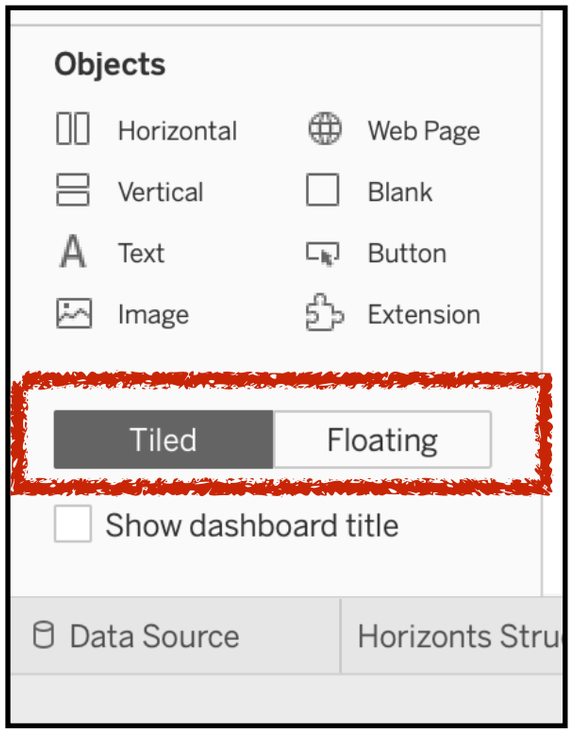
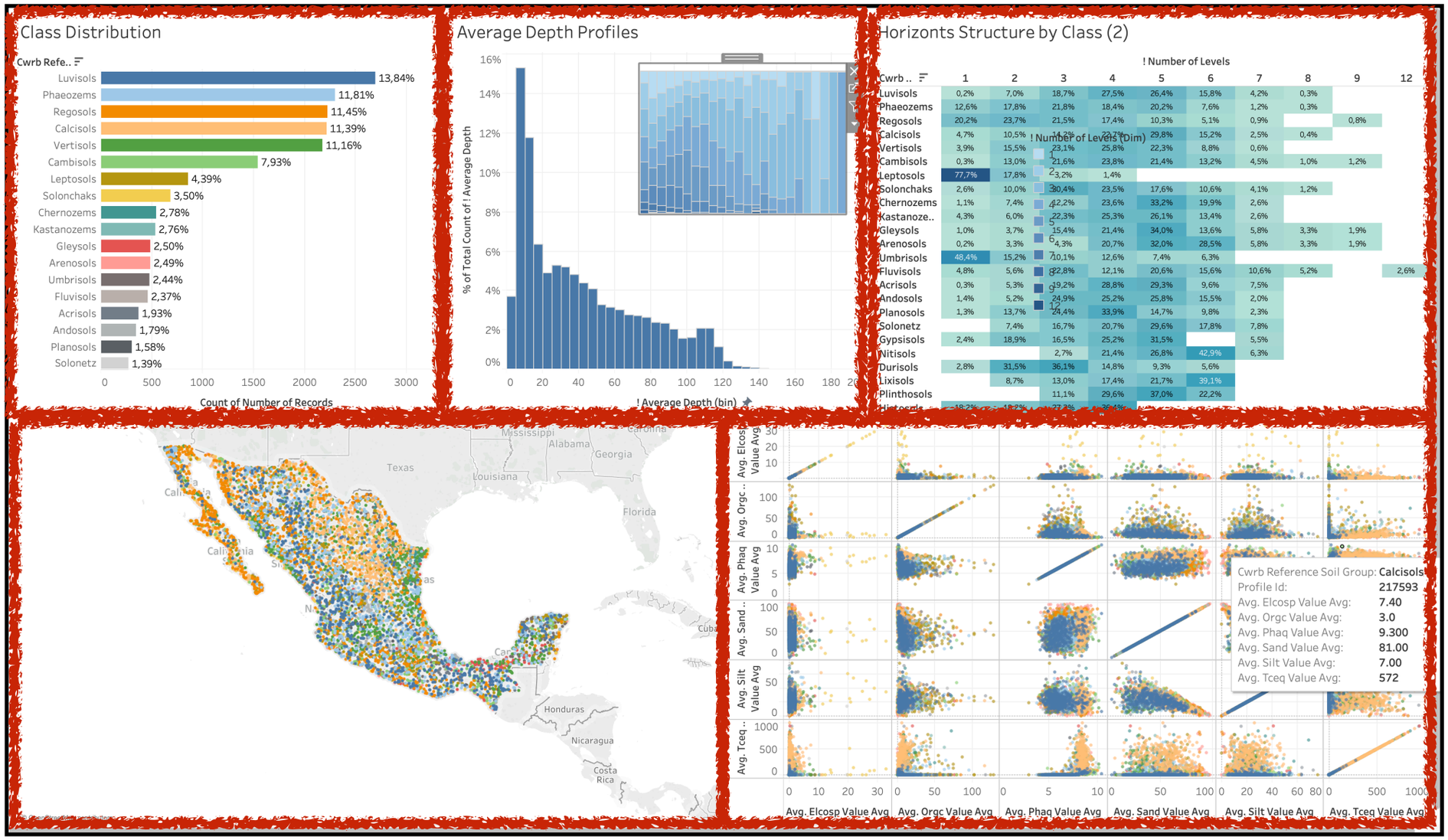
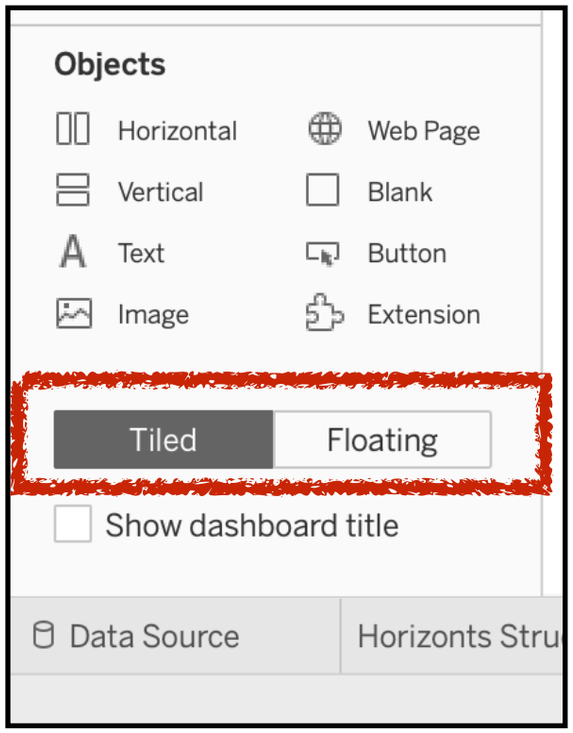
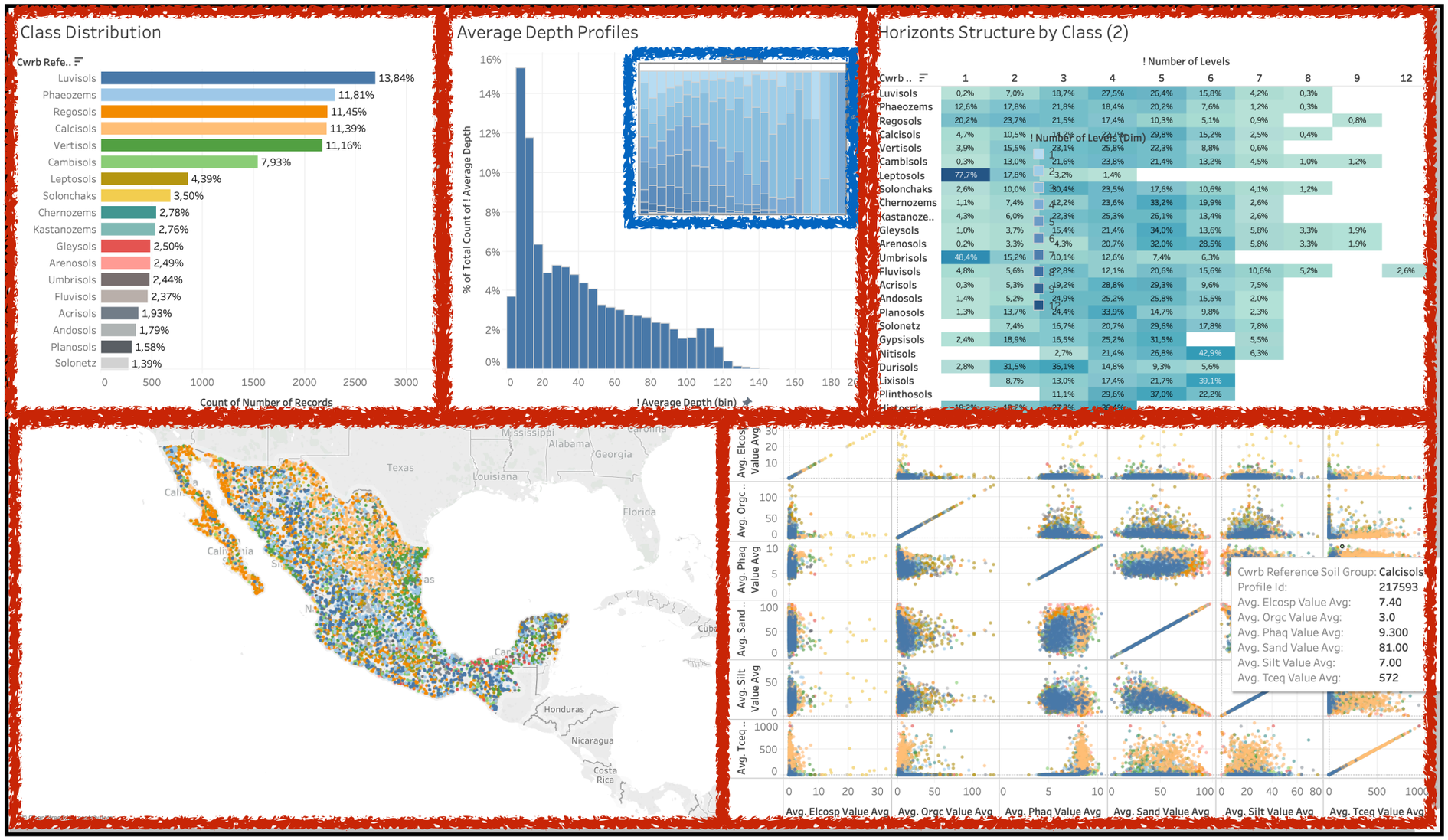




Dashboards - Design



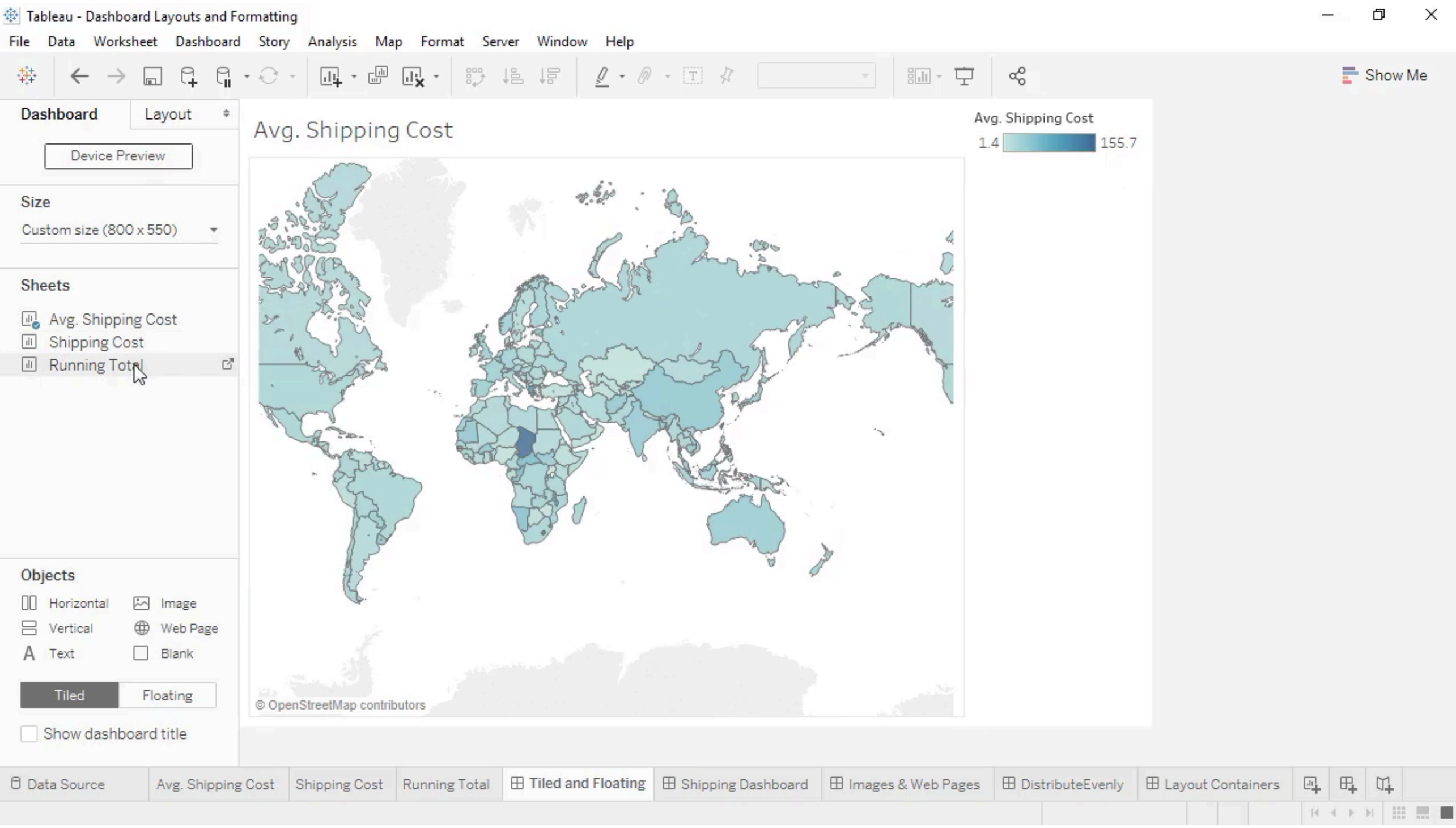


Dashboards

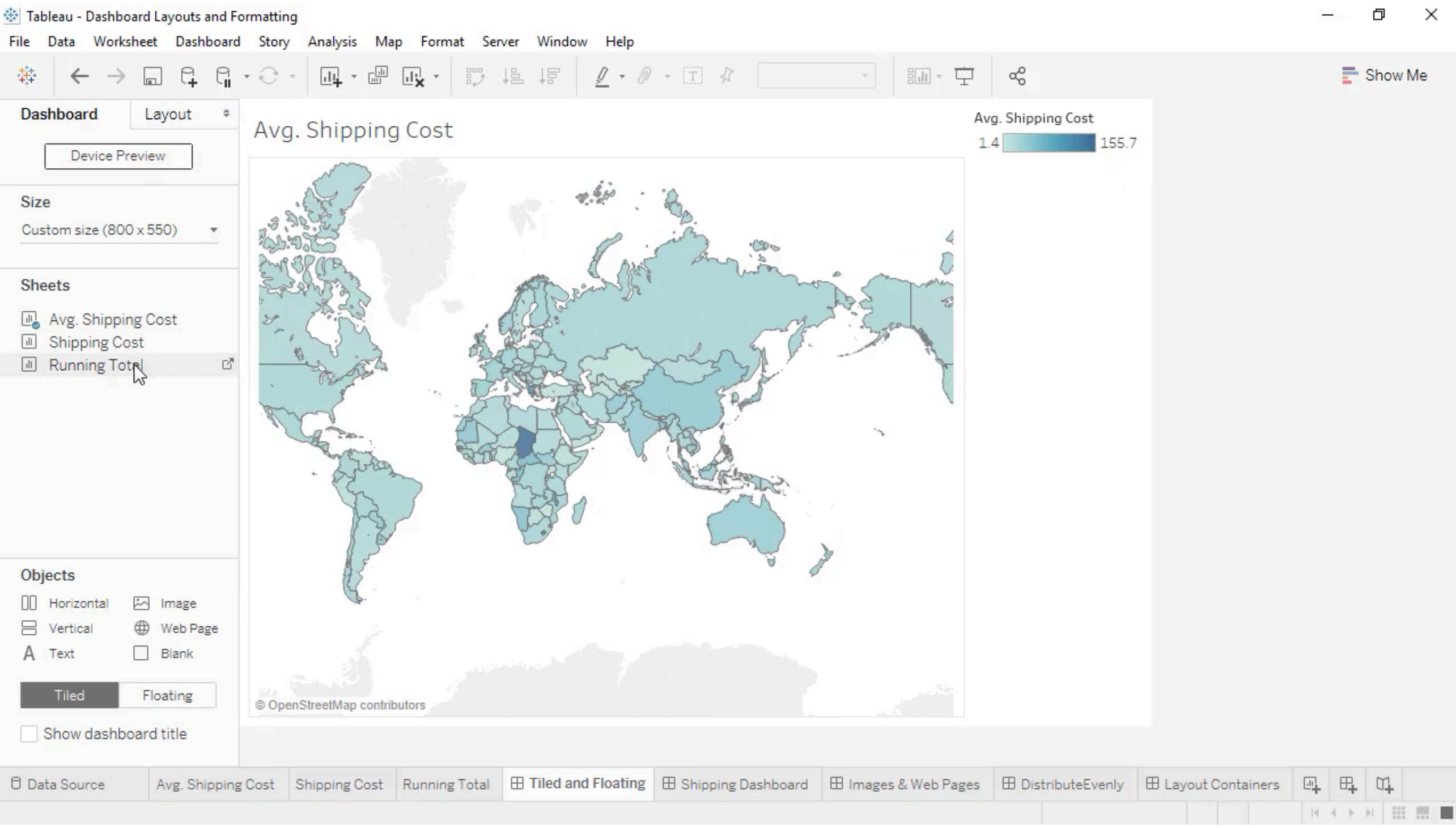
- **Other objects**
  - **Image**
  - **WebPage**
  - **Blank**

- **See the video tutorial on Dashboard Objects**
  - **https://www.tableau.com/learn/tutorials/on-demand/dashboard-objects?product=all&version=tableau_desktop_2019_1&topic=dashboardsstories**

Dashboards - tutorial on Dashboard Objects **Link to video**

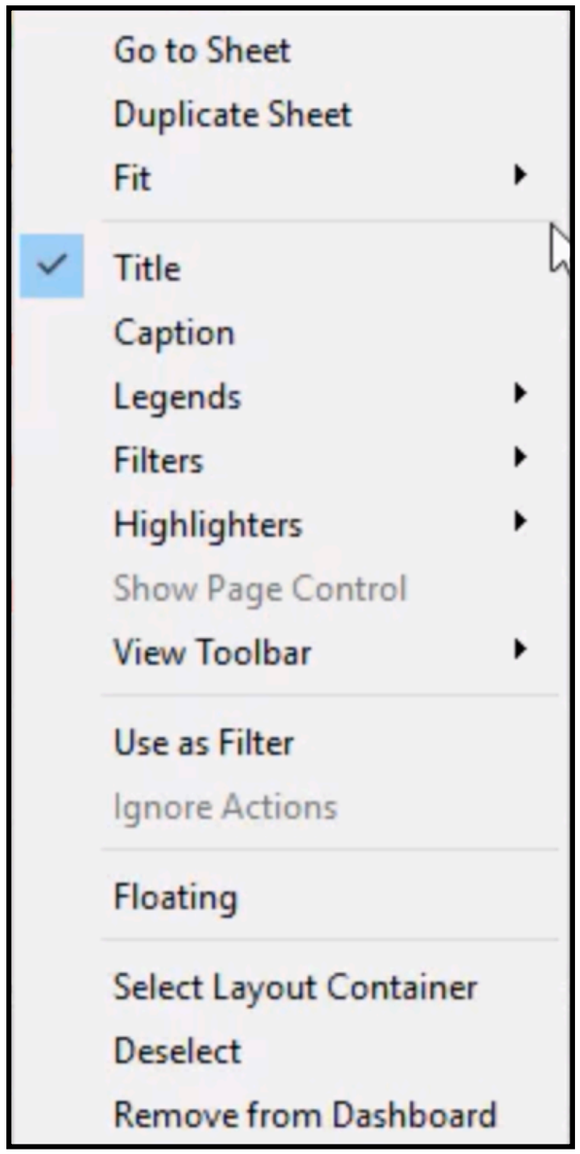


Dashboards - tutorial on Dashboard Objects **Link to video**



Dashboards - Content of a Container

- **Controlling the way the content of tile is displayed (specially the sheets)**
  - **Legends, Filters, Highlighters**



Dashboards - Interaction - Actions

Link to video

Tableau - Dashboard Interactivity using Actions

File Data Worksheet Dashboard Story Map Format Server Window Help

Show Me

Dashboa... Layout

Device Preview

Size

Custom size (800 x 550)

Sheets

- Product Sales
- Profit Map
- Sales & Profit

Objects

- Horizontal
- Image
- Vertical
- Web Page
- Text
- Blank

Tiled Floating

Show dashboard title

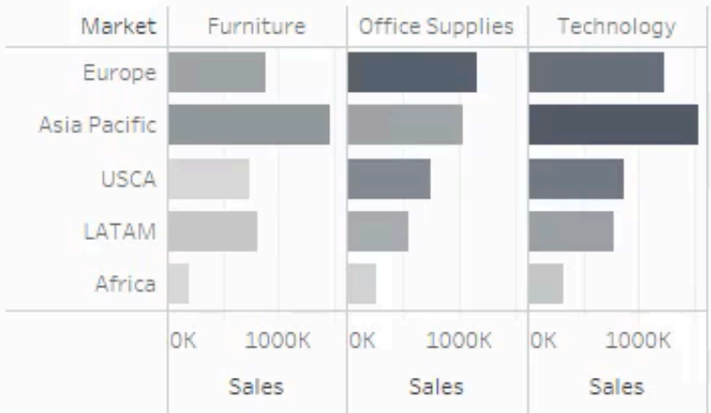
Sales and Profitability

Profit
-34,572 311,149

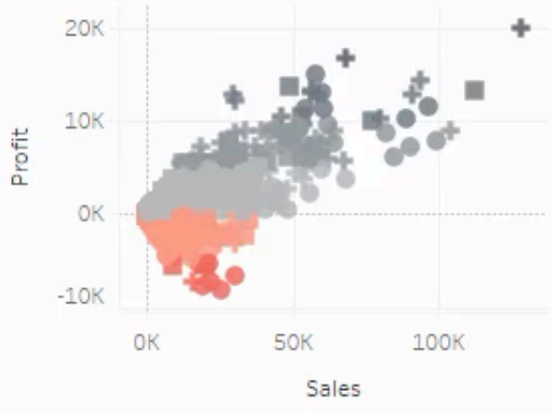
Market
(All)
Africa
Asia Pacific
Europe
LATAM
USCA

Category
Furniture
Office Supplies
Technology

Product Sales



Sales and Profit



Profit
-9,967 19,933

Data Source | Sales and Profitability | URL Actions

User

Dashboards - Interaction - Actions

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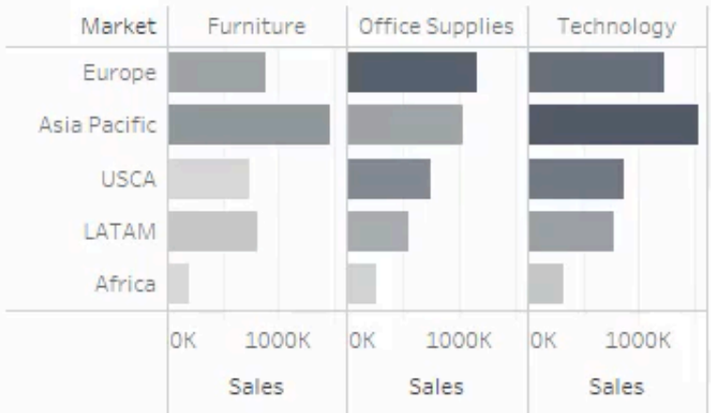
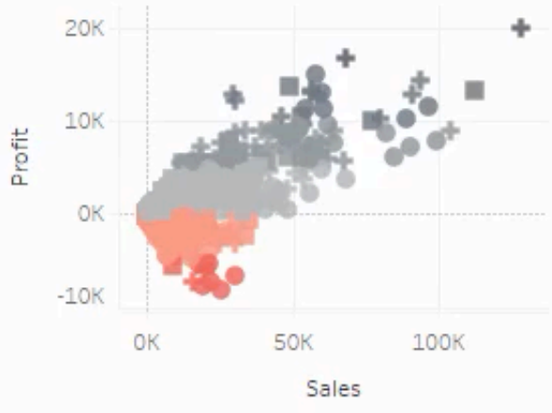


Sales and Profit



Profit
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Data Source | Sales and Profitability | URL Actions

User

Dashboards - Interaction - Actions

- **Actions**
  - **Highlight, Filter, or URL.Actions**
- **Highlight and Filter Actions have a source and target**
- **URL actions can include field values as dynamic inputs**
- **An action can be activated by various mouse behaviors:**
  - **hovering**
  - **clicking**
  - **menu option in the tooltip.**

Dashboards - Actions: Highlight

Link to video

Tableau - Dashboard Interactivity using Actions

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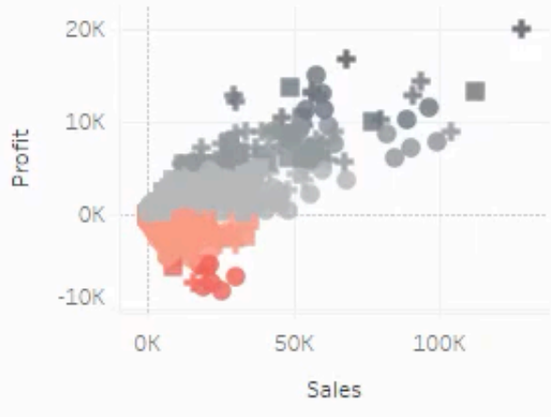
Sales and Profit



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Dashboards - Actions: Highlight

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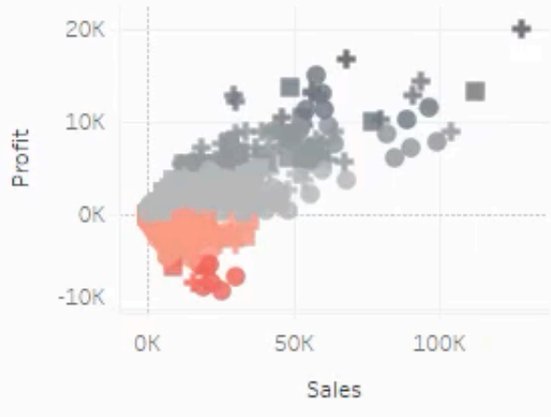

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Data Source | Sales and Profitability | URL Actions

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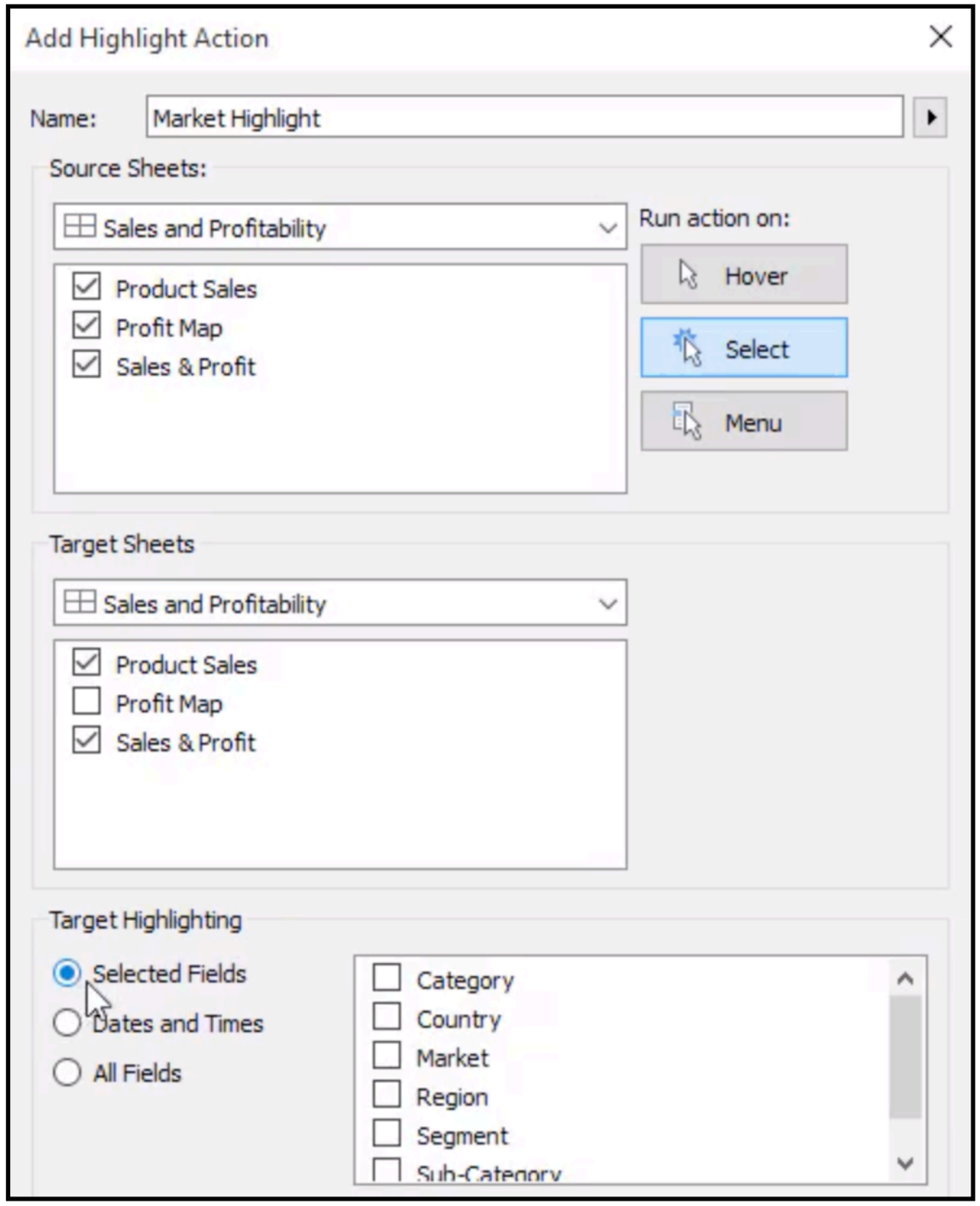
Dashboards - Actions: Highlight



Dashboards - Actions: Filtering

Link to video

Tableau - Dashboard Interactivity using Actions

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Entire View | Show Me

Dashboa... | Layout

Device Preview

Size

Custom size (800 x 550)

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- Profit Map
- Sales & Profit

Objects

Horizontal | Image | Vertical | Web Page | Text | Blank

Tiled | Floating

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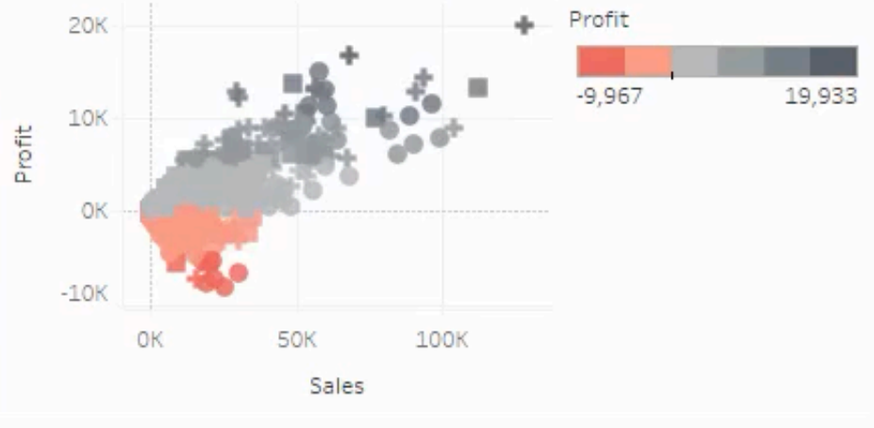

Profit
-9,967 19,933

Data Source | Sales and Profitability | URL Actions

1162 marks | 1 row by 1 column | SUM(Sales): 12,642,502 | Highlighting on Category | User

Dashboards - Actions: Filtering

Link to video

Tableau - Dashboard Interactivity using Actions

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Entire View | Show Me

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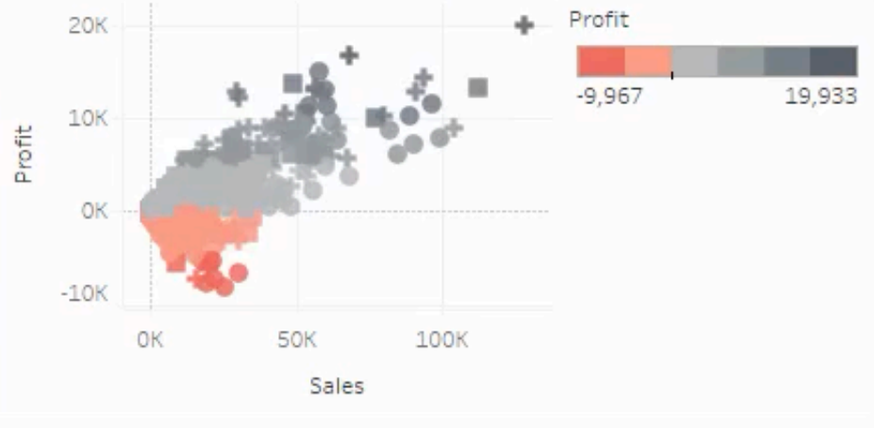

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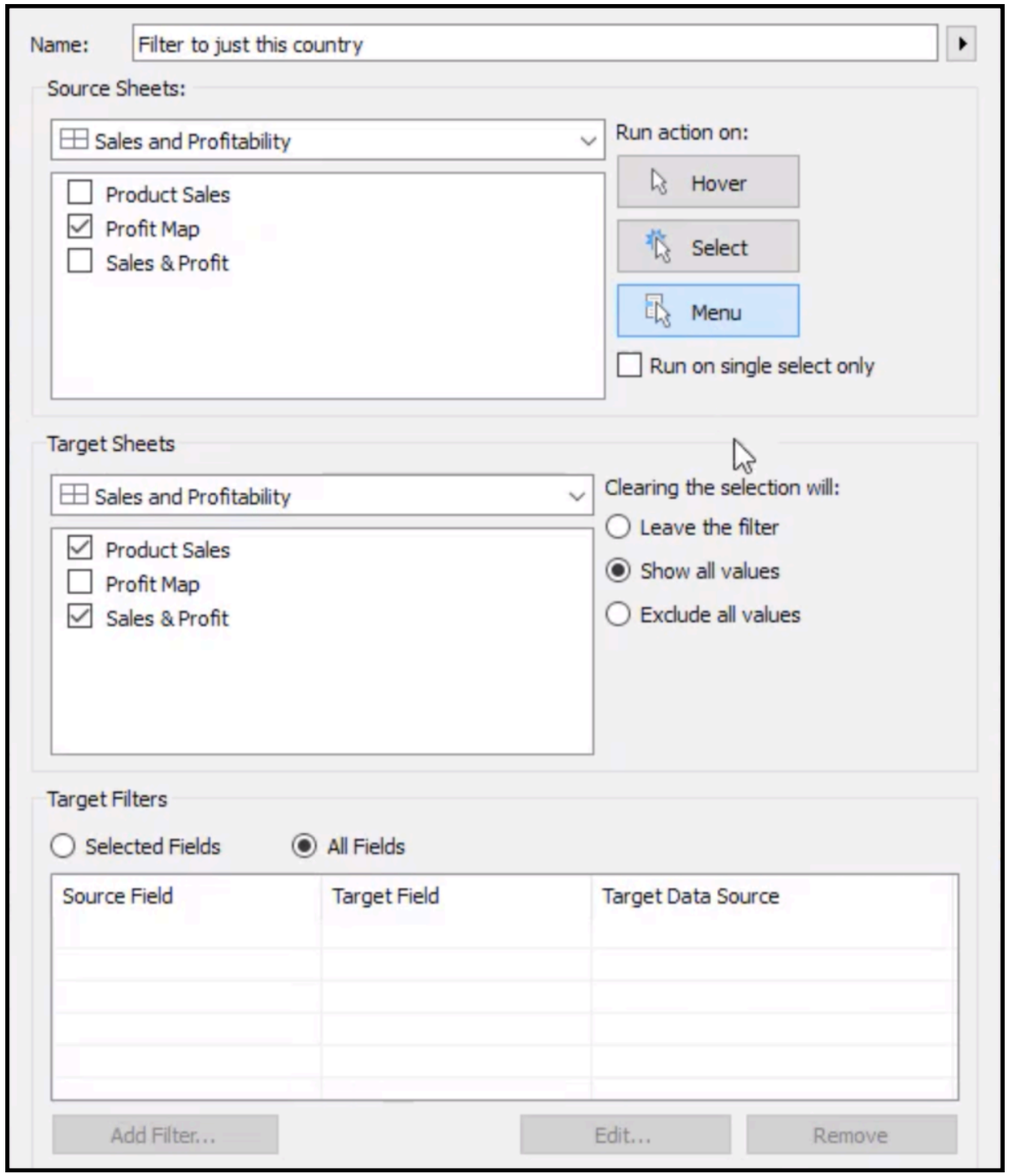
Dashboards - Actions: Filtering



Dashboards - Actions: URL

Link to video

Tableau - Dashboard Interactivity using Actions

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Show Me

Dashboa... Layout

Device Preview

Size

Custom size (800 x 550)

Sheets

NZ Cities

NZ Sales

Objects

Horizontal Image

Vertical Web Page

Text Blank

Tiled Floating

Show dashboard title

Sales by State - Select a State to Filter the Map

New Zealand	Gisborne	1,434
	Otago	
	Marlborough	2,850
	Nelson	
	Southland	
	Manawatu-Wanganui	4,184
	Taranaki	
	Hawke's Bay	
	Northland	10,457
	Bay of Plenty	
	Canterbury	
	Waikato	20,618
	Wellington	36,691
	Auckland	

Sales by City - Select a City to bring up Wikipedia

Data Source | Sales and Profitability | URL Actions

3820 marks 1 row by 1 column SUM(Profit): 1,467,457

User

Dashboards - Actions: URL

Link to video

Tableau - Dashboard Interactivity using Actions

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Show Me

Dashboa... Layout

Device Preview

Size

Custom size (800 x 550)

Sheets

NZ Cities

NZ Sales

Objects

Horizontal Image

Vertical Web Page

Text Blank

Tiled Floating

Show dashboard title

Sales by State - Select a State to Filter the Map

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	Waikato	20,618
	Wellington	36,691
	Auckland	

Sales by City - Select a City to bring up Wikipedia

Data Source | Sales and Profitability | URL Actions

3820 marks 1 row by 1 column SUM(Profit): 1,467,457

User

Recommended Actions

Plan your dashboards

- See the video “Concept: Planning for a Successful Dashboard” from the Module “Advanced Dashboards: Using Design Techniques and Filter Actions” from the “Desktop II: Intermediate” Course

  - Tableau eLearning: https://www.tableau.com/learn/training/elearning
  - Sign-in
  - Check the course “Desktop II: Intermediate”
  - Check the module “Advanced Dashboards: Using Design Techniques and Filter Actions”
  - See the video “**Concept: Planning for a Successful Dashboard**”

THANK YOU!

jmp@fct.unl.pt

fpb@fct.unl.pt

FACULDADE DE CIÊNCIAS E TECNOLOGIA
UNIVERSIDADE NOVA DE LISBOA

NOVALINCS
LABORATORY FOR COMPUTER SCIENCE AND INFORMATICS

Departamento de Informática, FCT/UNL
Quinta da Torre P-2829-516
CAPARICA, Portugal

di.secretariado(AT)fct.unl.pt

(+351) 212948536 (direct)
(+351) 212948300 (central)
(+351) 212948500 (central)