

Tableau Quick Reference Guide

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Login

Go to <https://tableau.montclair.edu/>, enter your NetID and password, and click 'Sign In'



Username

Password

Sign In

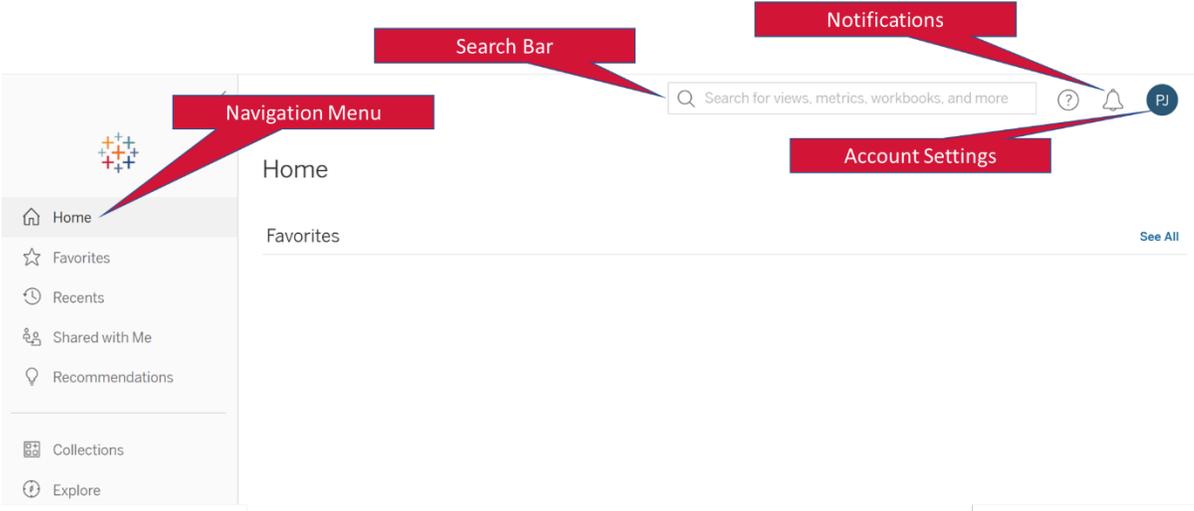
Tableau can be accessed while connected to the on-campus network.
If you are off-campus, you must first connect to the Campus VPN.

If you do not have access to Tableau or the Campus VPN, contact the IT Service Desk via phone (x7971) or email (itservicedesk@montclair.edu) to request access. Be sure to provide your name, NETID, and a short justification statement on why you are requesting access.

Navigating Tableau

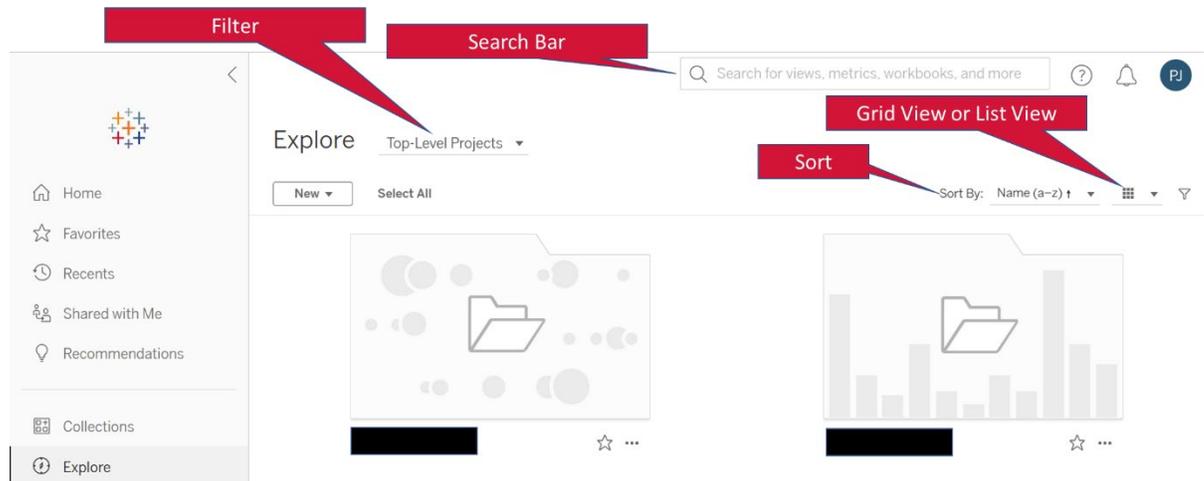
Home Page

Once logged in, the default page will be the Home Page unless you have changed this setting.



Explore Page

This page will display all content you have access to. Content is organized in a hierarchical structure that can be navigated like the file system on your computer. The default view is Grid View and can be changed to a List View.



- **Search Bar:** Used to type in keywords and find matching items such as views, workbooks, and projects
- **Filter:** Used to filter out what is listed. Default is Top-Level Projects
- **Sort:** Used to sort the items listed
- **Grid View or List View:** Switch between displaying items as a Grid or List. Default is Grid.

Project vs Workbook vs View

- **Project:** Used to organize content and assist in delegation of content access
 - Can contain other (nested) projects
 - When you click a project, you will see all content within that project
- **Workbook:** A workbook, within a Project, contains one or more sheets (similar to different tabs in Microsoft Excel). Each sheet can be a different worksheet, dashboard, or story.
- **View:** A collection of visualizations that have been developed and integrated into a dashboard
 - Options are displayed in the toolbar at the top for interacting with the view
 - If available, filters allow you to limit the visible data
 - Interacting with a view simply changes how it looks for the moment. The view will always revert to its default setup by the Workbook's creator.

Favorites

Using Favorites is a way to easily find and retrieve projects, workbooks, or view quickly and easily by adding them to your list of Favorites.

To add a Favorite, click on the white star.

- Workbook



- View



To access your Favorites, go to the Favorites page from the Navigation menu.

If desired, you can set the Favorites Page as your starting page when you login.

- Navigate to the Favorites page
- Click the top-right button for your content and accounts settings and click 'Make This My Start Page'

Toolbar Buttons

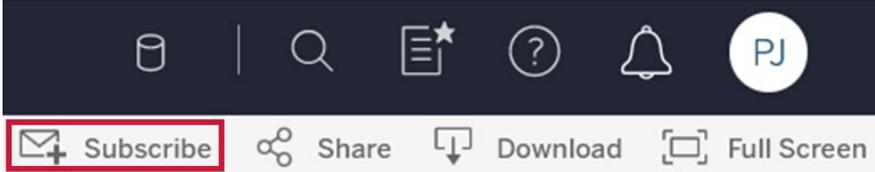
Toolbar Buttons appear above or below a report

 View: Original	Clear all filters and view the original report
 Alerts	Receive an email when a mark crosses a threshold.
 Subscribe	Subscribe to a dashboard which will email you a snapshot. See Subscribe for details.
 Share	Share views via links in an email or other applications. See Share for details.
 Download	Export the reports and its data. See Downloading for details.
 Full Screen	View in Full Screen mode

Subscribe

Subscriptions email you an image or PDF snapshot of a workbook at regular intervals without requiring you to sign into Tableau.

To subscribe to a view



- Open a view either directly or after opening a workbook
- Click the **Subscribe** button
- Select the appropriate options and click **Subscribe**

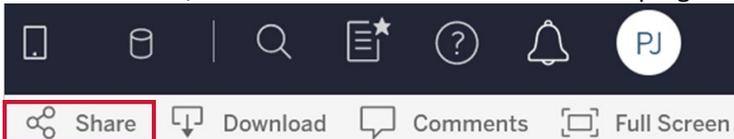
Share

Projects, Workbooks, and Views can be shared with other authorized users. Only users with the proper permissions enabled can see items.

To share a project or workbook, select the ellipsis (3 dots) near the Workbook title then choose Share from the dropdown menu.



To share a view, click Share from the toolbar at the top right of the page



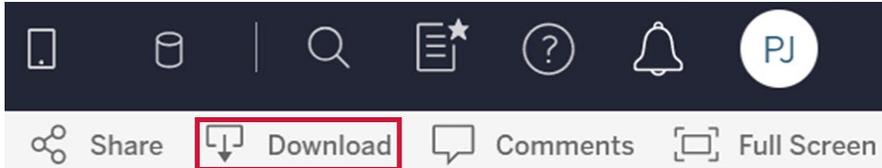
Note: If you want to share a specific view with filters/sorts applied to other users, you can do so by applying the filters/sorting first and then sharing.

Download

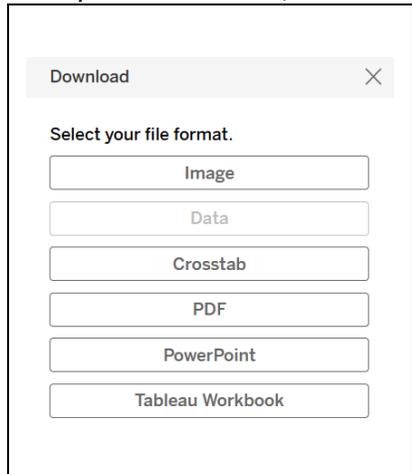
Workbooks and views can be downloaded in various formats.

To download

- Select Download from the menu bar at the top right of the page.



- Once you hit download, choose the format desired

 A screenshot of the Tableau 'Download' dialog box. The dialog has a title bar 'Download' with a close button 'X'. Below the title bar, it says 'Select your file format.' and lists six options in a vertical stack: 'Image', 'Data', 'Crosstab', 'PDF', 'PowerPoint', and 'Tableau Workbook'. Each option is in a light grey button with rounded corners.	<p>Available Formats:</p> <ul style="list-style-type: none">• Image: Downloads an image of the view in png format• Data: If accessible, downloads the data• Crosstab: Opens a dialog window where you can select to download as a csv or xlsx file• PDF: Opens a dialog window where you can select specific sheets, scaling, paper size, and orientation to download as a PDF• PowerPoint: Downloads selected sheets as images on individual slides in a PowerPoint presentation• Tableau Workbook: If accessible, downloads the Tableau Workbook for use in Tableau Desktop or Tableau Reader
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Dashboard Navigation

Tabs/Sheets

Some reports have different tabs across the top of the screen (similar to Microsoft Excel). Each tab corresponds to a different sheet. To switch between tabs just click on another one.

If all tabs do not fit on your screen, navigation icons will be available.



	Click to see full list of available tabs and select desired tab
	Scroll left
	Scroll right

Filters

Filters, located in various locations of a Dashboard, allow a user to drill down into specific data. When a filter is selected, graphs and data will update to reflect the user's selections.

Types of Filters – Detail Explanation

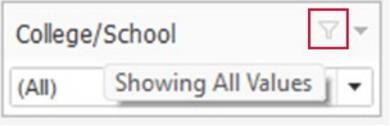
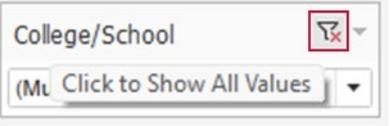
- **Single Value (List):** Displays values of the filter as a list of radio buttons where only a single value can be selected at a time.
- **Single Value (Dropdown):** Displays values of the filter in a drop-down list where only a single value can be selected at a time.
- **Single Value (Slider):** Displays values of the filter along the range of a slider. Only a single value can be selected at a time.
- **Multiple Values (List):** Displays the values in the filter as a list of check boxes where multiple values can be selected.
- **Multiple Values (Dropdown):** Displays the values in the filter as a drop-down list where multiple values can be selected.
- **Multiple Values (Custom List):** Displays a text box where you can type a few characters and search for the value.
- **Wildcard Match:** Displays a text box where you can type a few characters. All values that match those characters are automatically selected.

Types of Filters – Visual Examples

<p>Single Value (List)</p> <p>College/School</p> <ul style="list-style-type: none"> <input checked="" type="radio"/> (All) <input type="radio"/> College of the Arts <input type="radio"/> Community Health <input type="radio"/> Education and Human Servi... <input type="radio"/> Feliciano School of Business <input type="radio"/> General Program <input type="radio"/> Humanities and Social Scie... <input type="radio"/> School of Nursing <input type="radio"/> Science and Mathematics <input type="radio"/> University College 	<p>Single Value (Dropdown)</p> <p>College/School</p> <p>(All)</p> <p>Enter search text</p> <ul style="list-style-type: none"> (All) College of the Arts Community Health Education and Human Services Feliciano School of Business General Program Humanities and Social Sciences School of Nursing Science and Mathematics University College 	<p>Single Value (Slider)</p> <p>College/School</p> <p>(All)</p>
<p>Multiple Values (List)</p> <p>College/School</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> (All) <input checked="" type="checkbox"/> College of the Arts <input checked="" type="checkbox"/> Community Health <input checked="" type="checkbox"/> Education and Human Servi... <input checked="" type="checkbox"/> Feliciano School of Business <input checked="" type="checkbox"/> General Program <input checked="" type="checkbox"/> Humanities and Social Scie... <input checked="" type="checkbox"/> School of Nursing <input checked="" type="checkbox"/> Science and Mathematics <input checked="" type="checkbox"/> University College 	<p>Multiple Values (Dropdown)</p> <p>College/School</p> <p>(All)</p> <p>Enter search text</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> (All) <input checked="" type="checkbox"/> College of the Arts <input checked="" type="checkbox"/> Community Health <input checked="" type="checkbox"/> Education and Human Services <input checked="" type="checkbox"/> Feliciano School of Business <input checked="" type="checkbox"/> General Program <input checked="" type="checkbox"/> Humanities and Social Sciences <input checked="" type="checkbox"/> School of Nursing <input checked="" type="checkbox"/> Science and Mathematics <input checked="" type="checkbox"/> University College 	<p>Multiple Values (Custom List), aka Search Box</p> <p>College/School</p> <input type="text"/>
<p>Wildcard Match</p> <p>College/School</p> <input type="text"/>		

Show All Values Button

If available, whenever data is excluded in a filter, a small red 'x' appears on the 'Show All Values' button. When all values are showing, the 'x' disappears.

	<p>All values are currently shown The 'Show All Values' button appears without a red 'x'</p>
	<p>Values have been selected The 'Show All Values' button appears with a red 'x'</p>

Apply and Cancel Buttons

These buttons may be visible for multi-value selection filters.

- Select one or more filter values and click Apply to commit the selections
- Select cancel to clear the selection and return the filter to its previous state



Hierarchy

In some cases, the visualization will have a hierarchy built-in. A hierarchy enables you to drill up or down within the data visualization. A common hierarchy at Montclair State University is School/College > Department > Degree > Major.

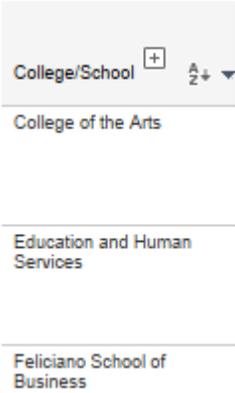
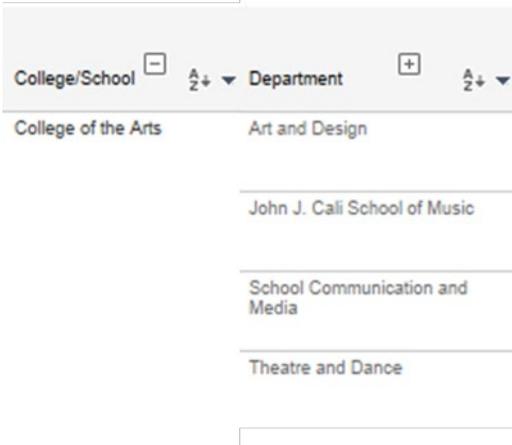
When you hover over the appropriate header an icon will appear.

⊕: Plus, Expands the data (aka Drill Down)

⊖: Minus, Collapses the data (aka Drill Up)

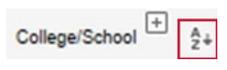
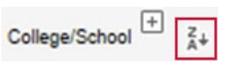
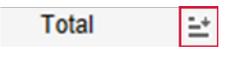
Example hierarchy navigation

Note: The icon will only appear when you hover over a header. The pictures below are to show the difference in the icons as you navigate a hierarchy.

<p>(1) Hover over 'College/School' to make the icon appear. Initially the icon will be a plus icon to expand the data.</p> <p>After clicking the plus icon on 'College/School', 'Department' will appear.</p>	<p>(2) The plus icon was clicked. Now, when you hover over 'College/School' a minus icon appears indicating you can collapse the data.</p> <p>'Department' will have a plus icon indicating you can expand another level.</p>
 <p>The screenshot shows a navigation menu with three main items: 'College of the Arts', 'Education and Human Services', and 'Feliciano School of Business'. The 'College of the Arts' item is expanded, showing a plus icon and a dropdown arrow next to the header 'College/School'. Below the header, the following departments are listed: 'College of the Arts', 'Art and Design', 'John J. Cali School of Music', 'School Communication and Media', and 'Theatre and Dance'.</p>	 <p>The screenshot shows a navigation menu with two main items: 'College of the Arts' and 'Art and Design'. The 'College of the Arts' item is collapsed, showing a minus icon and a dropdown arrow next to the header 'College/School'. The 'Art and Design' item is expanded, showing a plus icon and a dropdown arrow next to the header 'Department'. Below the header, the following departments are listed: 'College of the Arts', 'Art and Design', 'John J. Cali School of Music', 'School Communication and Media', and 'Theatre and Dance'.</p>

Sorting

The data presented can be sorted by clicking on buttons within graphs and tables. When hovering over a header, an icon to sort may appear. If the icon appears, the data can be sorted in either ascending (A-Z, 0-9) or descending (Z-A, 9-0) order. Click the icon to change the sort order.

	Indicates data is sorted in alphabetical (A-to-Z) order
	Indicates data is sorted in reverse alphabetical (Z-to-A) order
	Indicates data is sorted in ascending order
	Indicates data is sorted in descending order

Tooltips

If enabled, hover over graphs and tables to see more details about the data

Information Tooltips

Some dashboards may contain an icon meant to provide helpful hints or additional information. This is typically done to save space on the dashboard. Hover over the icon to see the information in the form of a tooltip.

Example Icons:



Highlighting

When you click on a graph or legend for a graph, all of the graphical elements that are associated with that data point will be highlighted. To remove the highlighting, click again.