

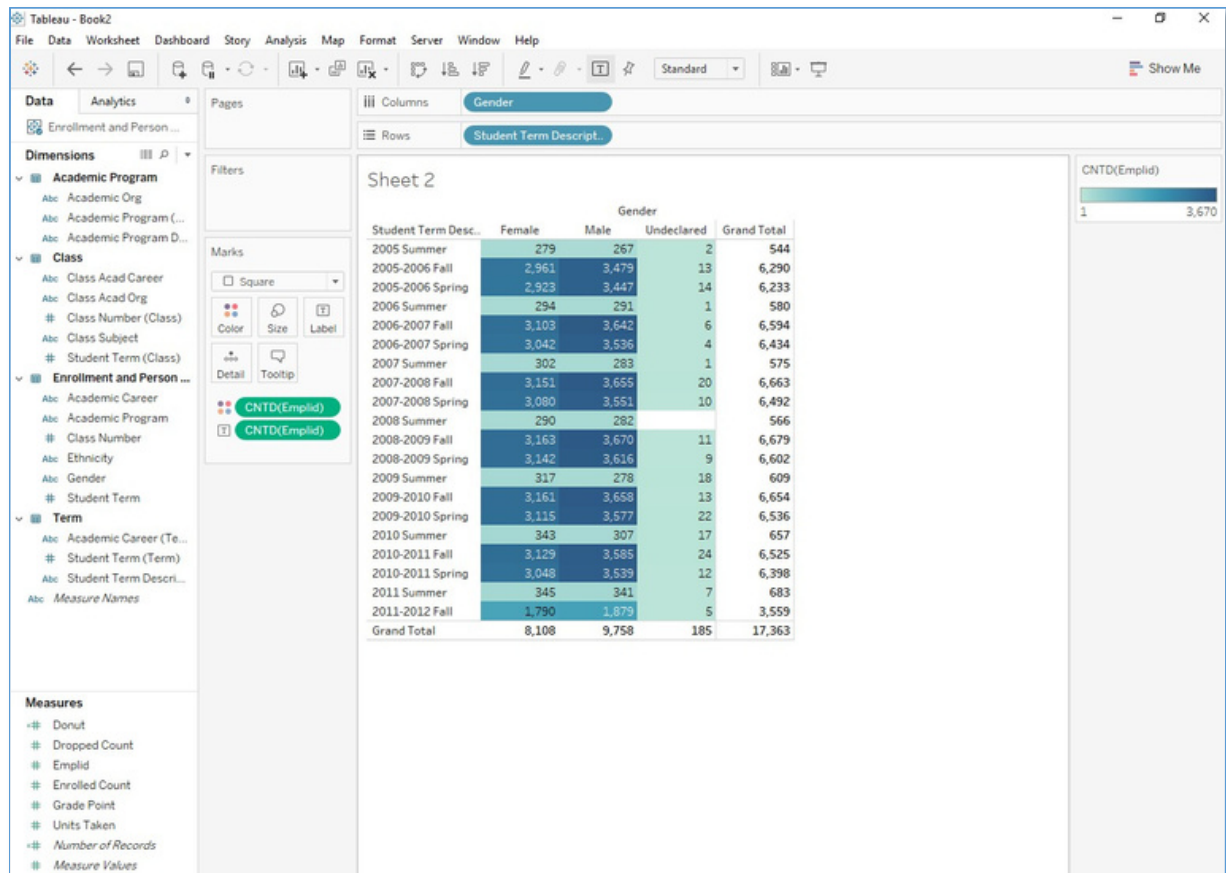
Tableau

Dashboards – Connecting Your Worksheets to One Another

Once you've created several visualizations, you will often want to incorporate them with one another to provide a richer experience for your report consumers. Tableau allows you to do this through the creation of Dashboards and Stories. We'll create a Dashboard here so you can gain some experience.

Using the **Enrollment and Person Fact** + data source from the Tableau Server, we'll combine a crosstab with the donut chart we just created.

1. Drawing from our previous examples, start by creating the crosstab shown in the below image.

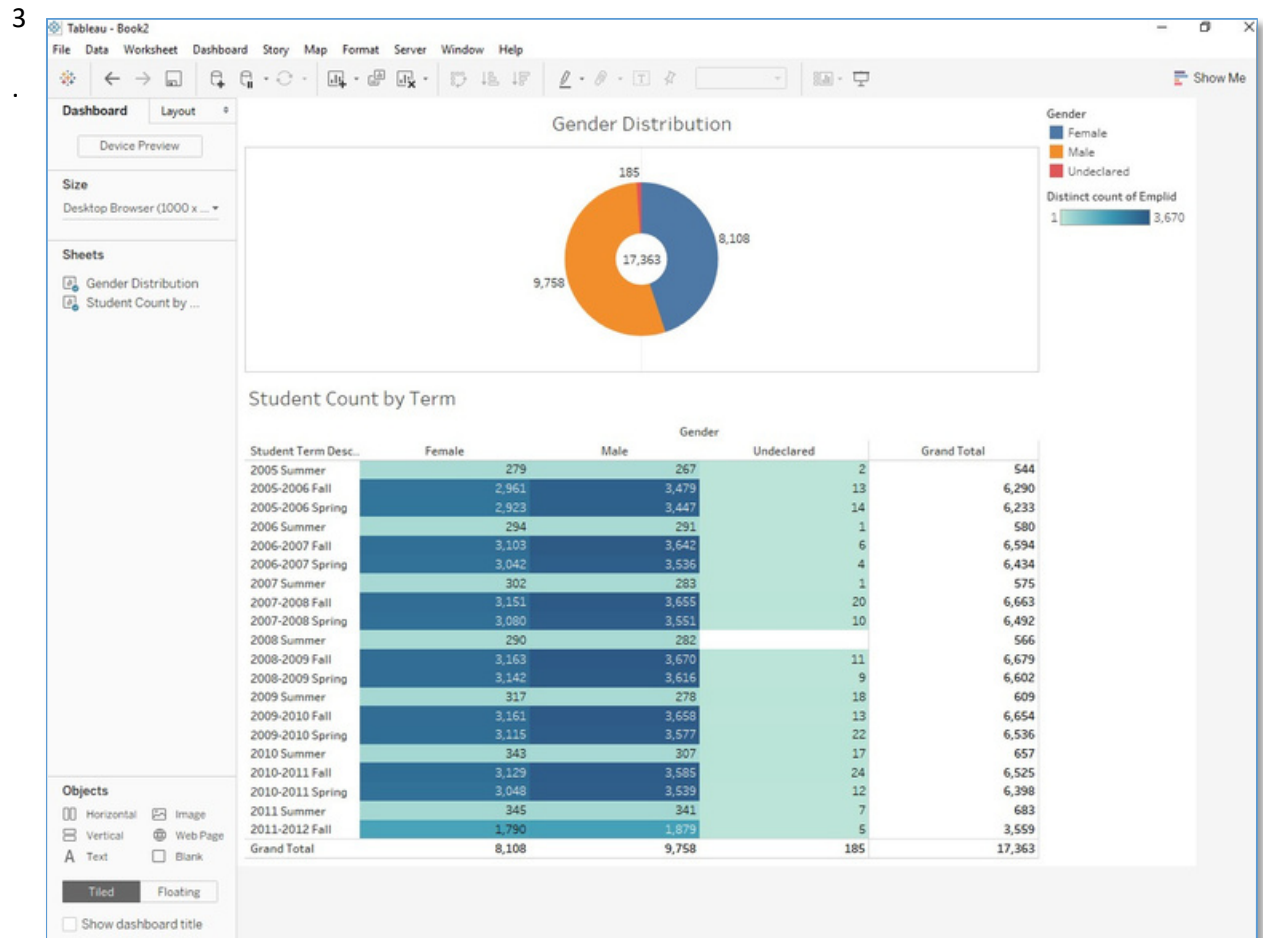


Make sure to set the **Mark Type**, **Color**, and **Add Totals**. (Hint: use the **Analysis** menu for totals.)

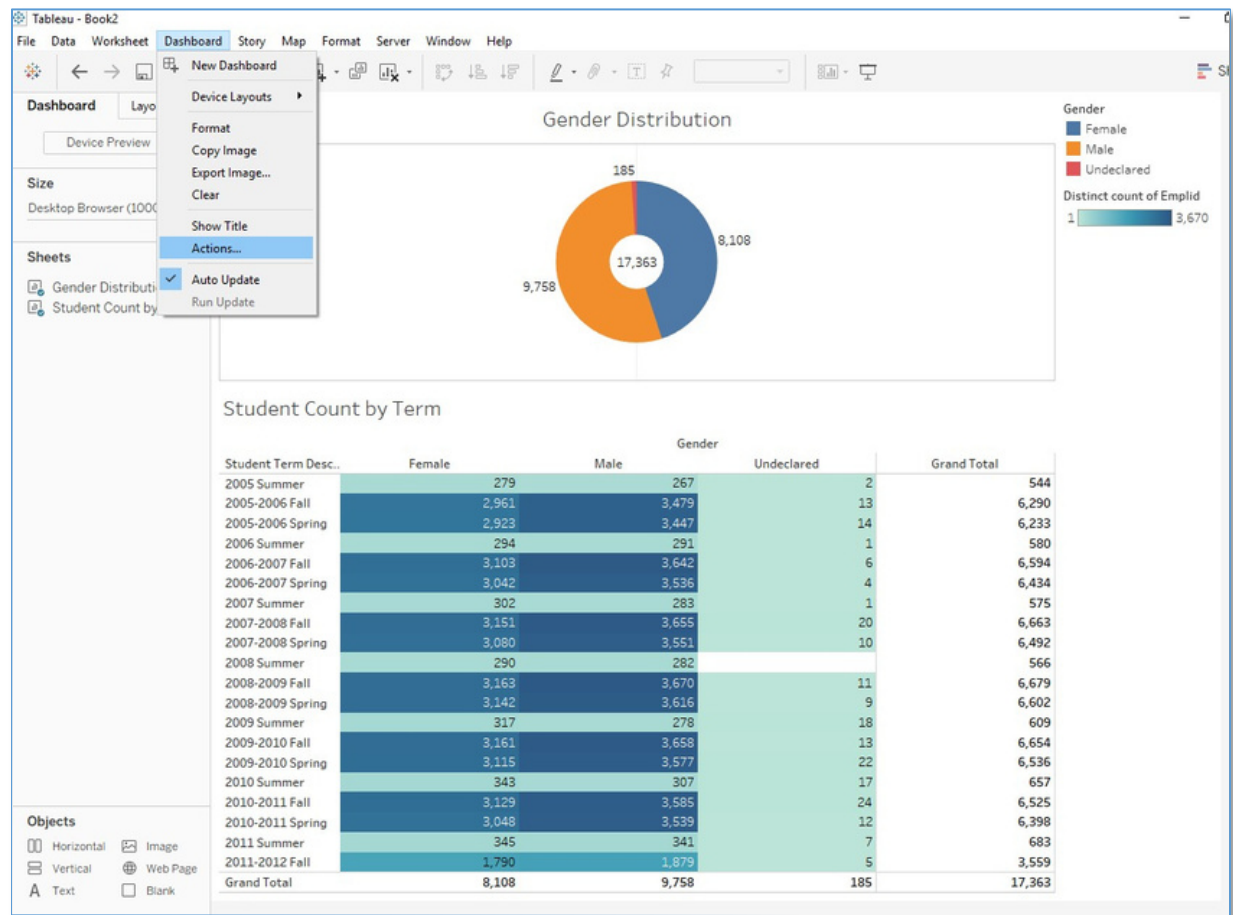
- 2 Click the New Dashboard icon (shown to the right) to create a new blank dashboard.



- Bring your Donut Chart and Crosstab onto the dashboard as shown below.



- Once on the Dashboard, you can add actions that will tie your visualizations together. To do this, on the **Dashboard** menu, select **Actions...**

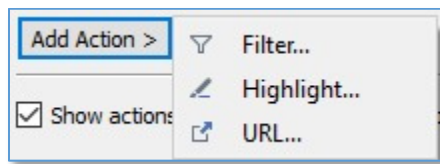


The **Actions** dialog box will open.

The 'Actions' dialog box is shown, titled 'Actions'. It contains instructions: 'Connect sheets to external web resources using URL actions, or to other sheets in the same workbook using Filter actions and Highlight actions.' Below the instructions is a table with four columns: 'Name', 'Run On', 'Source', and 'Fields'. The table is currently empty. At the bottom of the dialog, there is a checkbox labeled 'Show actions for all sheets in this workbook' which is checked. To the right of the checkbox are 'OK' and 'Cancel' buttons. Above the 'OK' button are 'Add Action >', 'Edit...', and 'Remove' buttons.

Name	Run On	Source	Fields
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Click **Add Action** and select **Filter**.



5. In the Add Filter Action dialog box set **Name** to **Gender Filter**.

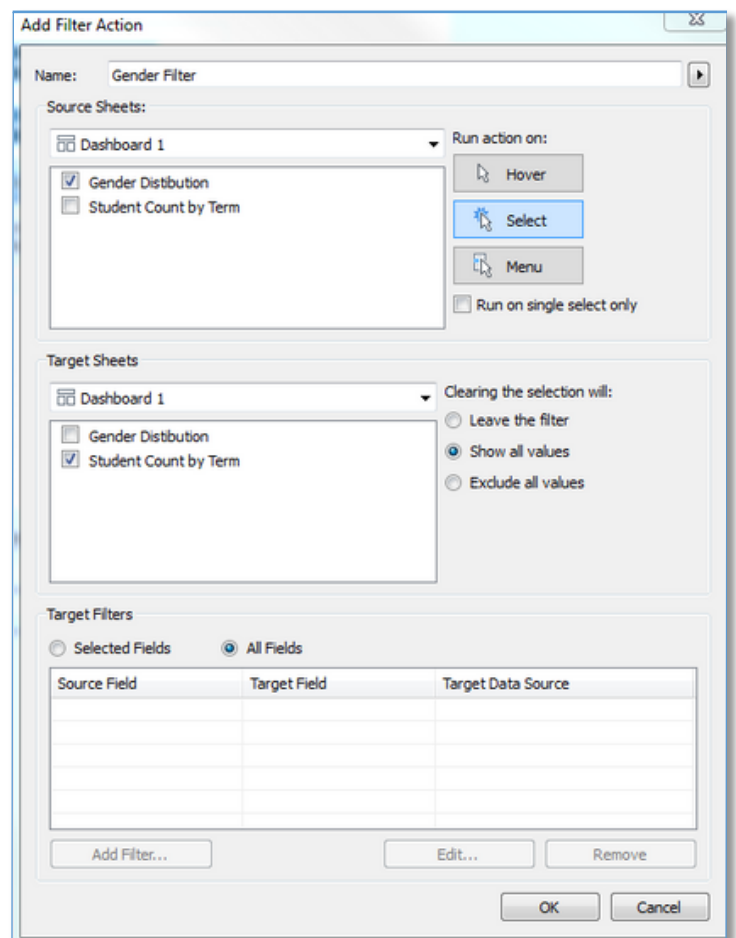
6. Change **Run action on** to **Select**.

7. The **Source Sheet** will be the **Gender Distribution** donut chart, so deselect the **Student Count by Term** crosstab.

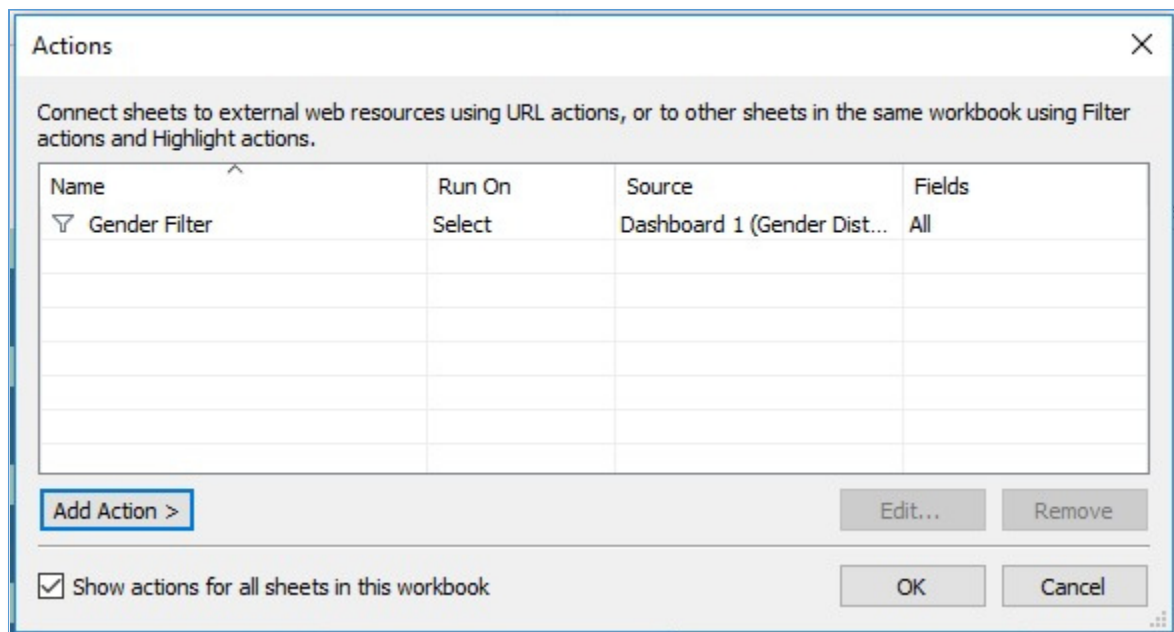
8. The **Target Sheet** will be the **Student Count by Term** crosstab so deselect the **Gender Distribution** donut chart.

9. Reset **Clearing of Selection** to **Show all values**.

When complete your selections should appear like this. Click **OK** to confirm.

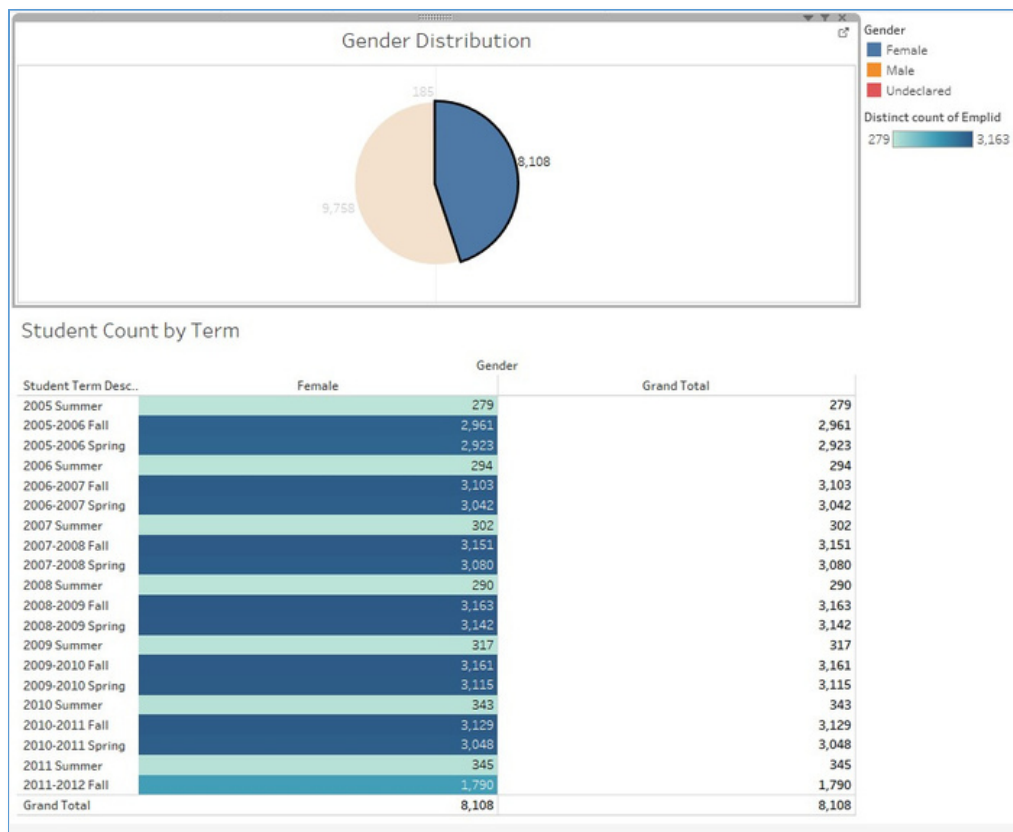


Your new filter will now be shown in the **Actions** dialog box.



10. Click **OK** to confirm.

With the filter in place now, clicking on any portion of the donut chart will reflect changes in the crosstab.

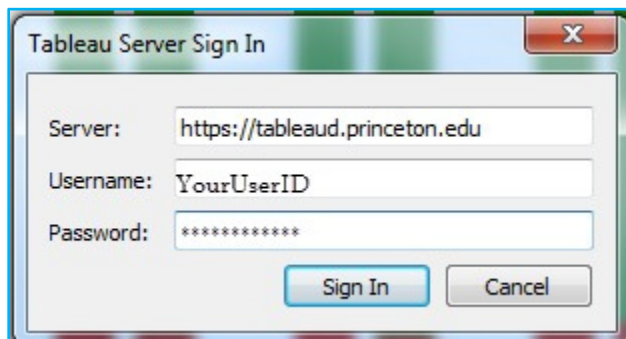


Publishing to Tableau Server

Once you've created your visualization and are ready to share it with others, you'll want to publish to the Tableau Server. This will make the Worksheet, Dashboard, or Story available to those with appropriately defined access on your Tableau site.

1. On the **Server** menu, select **Publish Workbook**.

2. The first thing you'll be asked to do is to sign into the server. The server we'll be using for training is <https://tableaud.princeton.edu>. You will enter your username (netid) and password.

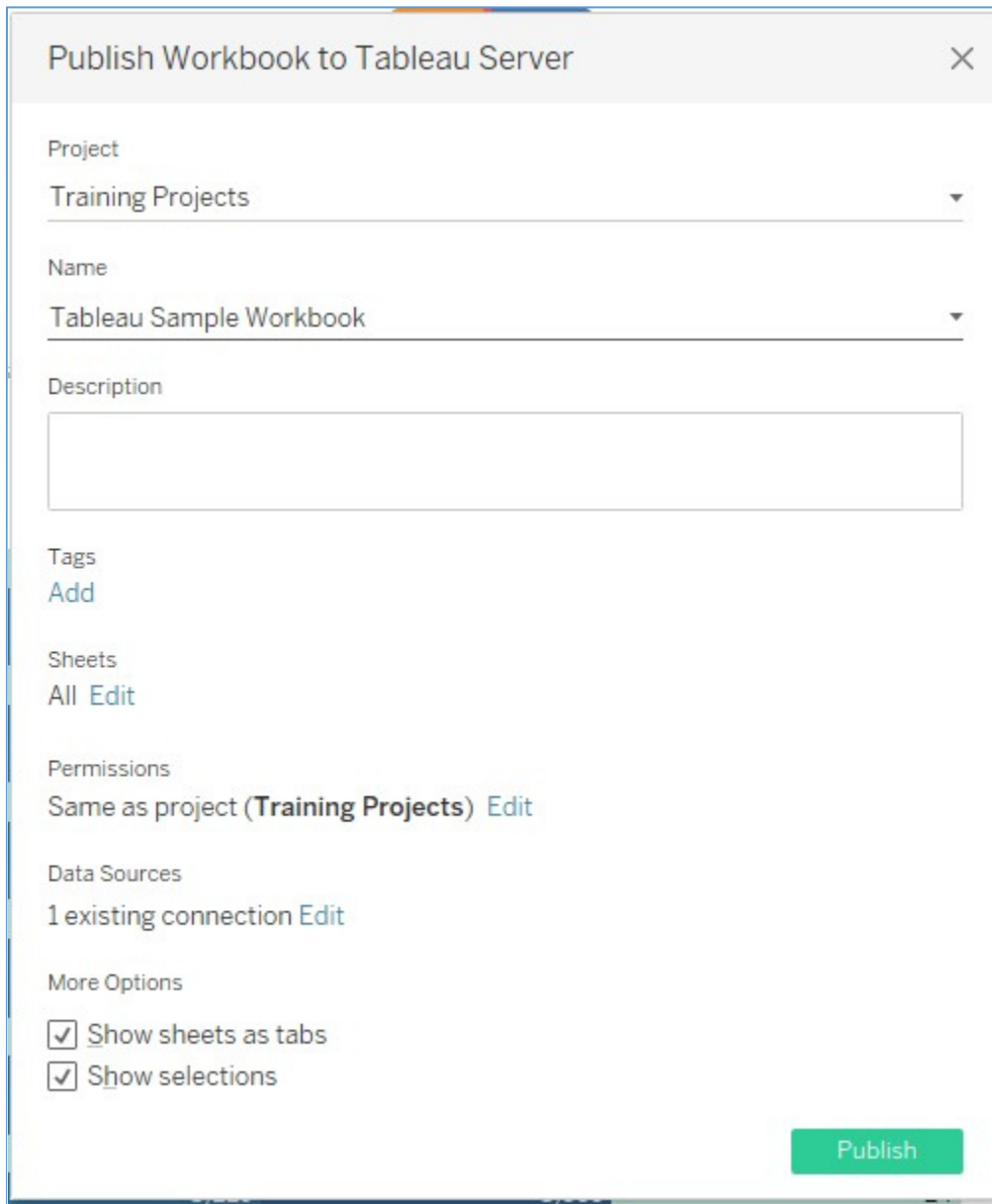


If you have access to more than one site on the server, after providing your username and password you'll be asked to select a site. We'll be using **Tableau Training** for this course.

3. Next you'll select the Project for your visualization. We'll use **Training Projects** for this class. You can also optionally customize the name of your workbook, set a description, and add tags. As the publisher you may also customize the permissions for your work. However, we do recommend leaving the default settings. The site administrator will have final control over how the individual permissions are set to content published to your server site.

If your workbook has more than one worksheet, dashboard, or story, you should select any or all that you would like to include on the server.

You can also customize the appearance of your visualization by indicating whether to show sheets as tabs, show selection or include external files such as images you may have included in your work.



The image shows a 'Publish Workbook to Tableau Server' dialog box. It has a title bar with a close button (X). The dialog is organized into several sections: 'Project' with a dropdown menu set to 'Training Projects'; 'Name' with a dropdown menu set to 'Tableau Sample Workbook'; 'Description' with a text input field; 'Tags' with an 'Add' button; 'Sheets' with 'All' and 'Edit' options; 'Permissions' with 'Same as project (Training Projects)' and an 'Edit' link; 'Data Sources' with '1 existing connection' and an 'Edit' link; and 'More Options' with two checked checkboxes: 'Show sheets as tabs' and 'Show selections'. A green 'Publish' button is located at the bottom right.

Publish Workbook to Tableau Server

Project
Training Projects

Name
Tableau Sample Workbook

Description

Tags
Add

Sheets
All Edit

Permissions
Same as project (Training Projects) Edit

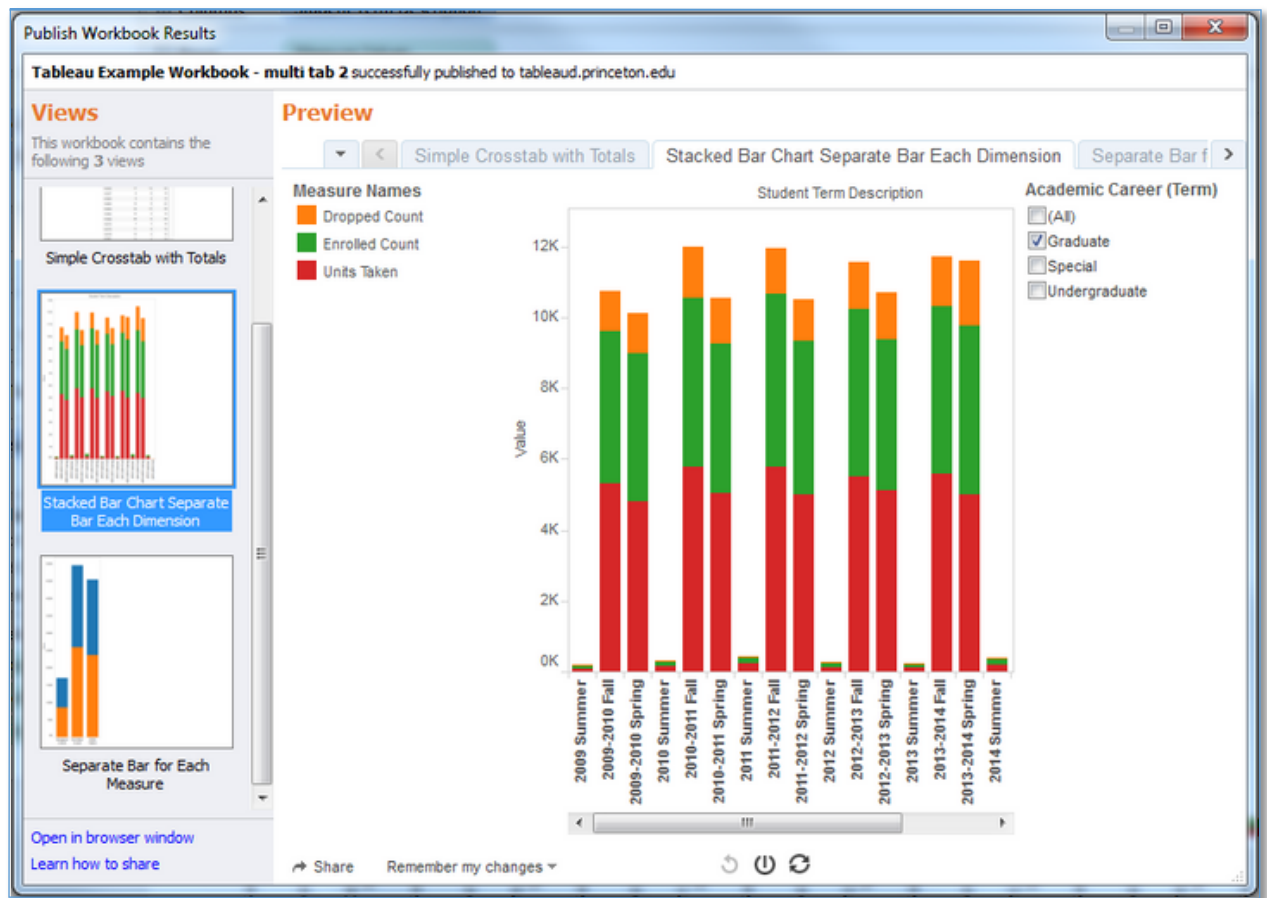
Data Sources
1 existing connection Edit

More Options
☒ Show sheets as tabs
☒ Show selections

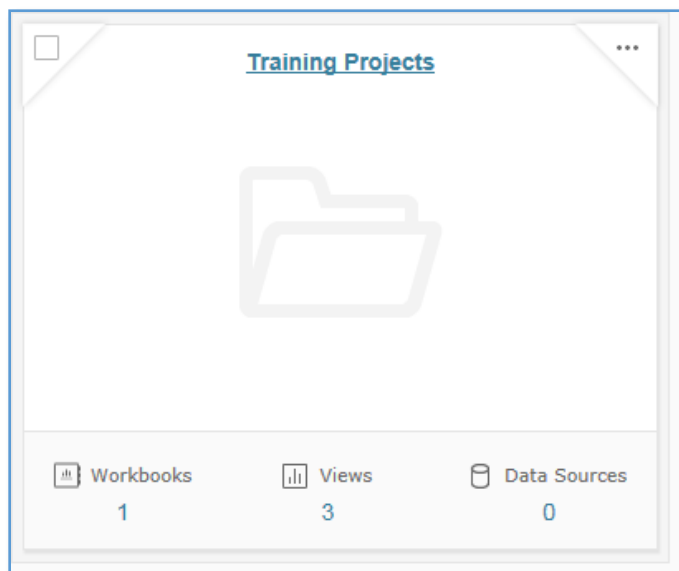
Publish

You can also set scheduling when publishing your work, though data extracts will be managed by your server administrator.

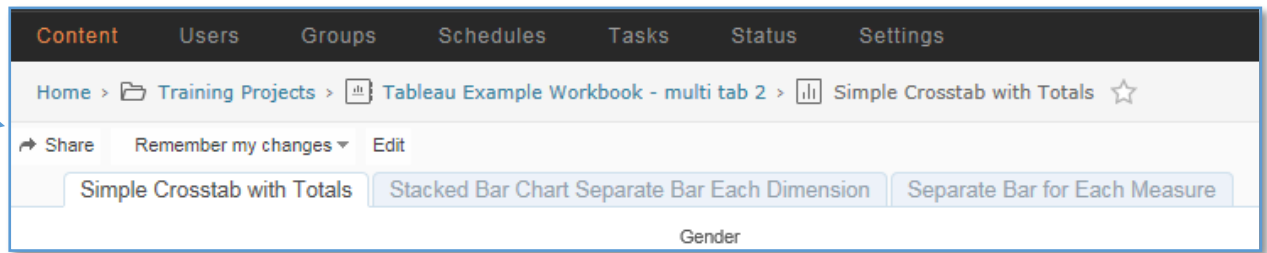
Once published, you may preview a sample of how your visualization will appear on the server.



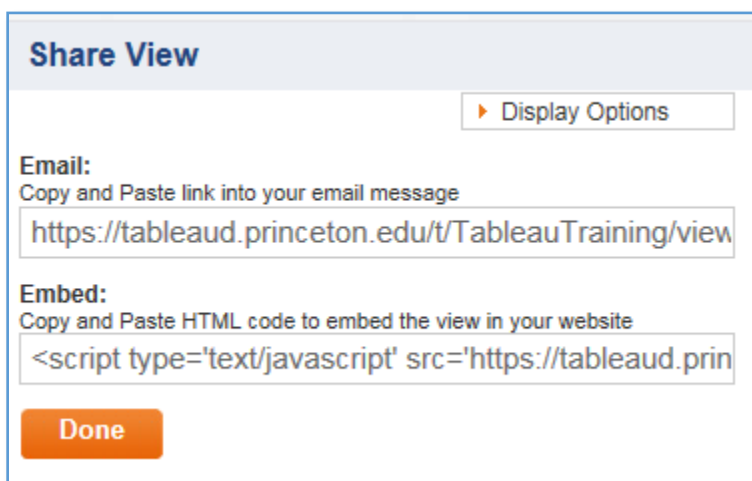
When you log into the server site, you will now see your work in the Project you selected.



- Once posted to the server, you have the option to share your work either by sending a URL that will direct people to the content on the server or by embedding code in webpages. To do this, when viewing your visualization on the server, click **Share**.



- Then select the appropriate link or embed code.



Using our Development or Production server will require users to be authenticated prior to accessing the views. If for any reason you need open, unauthenticated access you will need to work on the Princeton Tableau Public server.