

Tableau Reader : Tips and Tricks

1. Navigation

To go directly to a specific page you can either use the tabs across the bottom of the screen or click through

4. Sorting data

If there is an option to sort data within a particular chart, hovering over a column header will show a small icon with an arrow (like those below)

Clicking here will sort the data either alphabetically or by size (high to low or low to high). Clicking a second time will reverse the sort and a third click returns data to the default sort order.

5. Hiding or excluding data

Sometimes you may wish to hide or exclude data from certain charts. This is possible by right clicking on the item you want to hide or exclude. In the example below, modules which are no longer running can be excluded from the view:

Where the data forms part of a numerical calculation, hiding removes it from the view while excluding takes the data out of the calculation entirely.

6. Exporting data

The underlying data from any of the charts in Tableau can be exported into excel, in order for you to do further analyses if necessary. Click on the chart that you want to export (be aware dashboards may be made up of several charts – if this is the case the data will need to be exported one by one) then choose Worksheet – Export – 'Crosstab to E ; I