

Tableau show worksheet title on story

Continue

There are so many choices to make when we are choosing how to present our work. For data visualisation, most commonly we pick which type of chart will best convey the message. However, we may need to pick if we like to show our analysis by a single dashboard or to go with a story point format instead. Dashboards typically contain multiple worksheets (each containing one chart) and the whole analysis is presented on a single dashboard. They are quite good in the sense that all the analysis is on a single view and the audience doesn't have to lose one view to continue to another. That way the audience can refer at the chart the just observed if they want to. This is especially useful when we're using interactive filters that change the focus over the whole dashboard and going back and forth through pages can be painful. Story points, as the name implies, focuses on a story. What we would typically use a story points presentation is telling a story where the end isn't revealed right away. The audience would be led through the story step by step through a beginning, elaboration and an end. This can be particularly useful for presentations or lectures on how to do something step by step. Useful tips: Pick a dashboard when you have filters of highlights that run through the charts. Pick a story point if you don't want the audience to see the answer right away or you want to lead them through a step by step process. Most important tip is that typically a story point would contain one worksheet per page, but a whole dashboard can be also dragged into the view allowing for more charts on one page. Stories take up some space at the top where the story points titles are so your choices on how you want to structure titles and subtitles are limited. Always format all the story pages consistently. One size most definitely does not fit all in data analysis. People want to see different things because people interpret data in different ways, and they want to feel like the report they are looking at is specific to them. In our free whitepaper "10 Best Practices for Building Effective Dashboards", we delve a little deeper into dashboard customisation. Customise dashboards with custom titles One way to customise what they see is to use custom titles. This is an effortless thing to do in Tableau, and it has a huge impact. It gives your user an idea of what information is displayed. It gives your user an idea of which filters have been applied. And you can even use a custom title to say "Anoop Odedra's Dashboard" dynamically. So each user's name is displayed as if they own the dashboard. In the example above, you can see that the Dashboard title has my full name in it. The Sales by Product Category highlight table title has been customised to show which product category and region is being displayed and the Sales by Customer circle chart title shows which sub-category, product category and region is being displayed. As long as one of the fields is being used within the view or is on the marks shelf you can add it to your custom title. Additional fields There are a few additional fields that can be added to titles that differ from Dashboard titles and Worksheet titles. Dashboard Titles: Sheet Name (Dashboard name) Workbook Name Default Title Full name (of user signed into Tableau Server or Tableau Online) User Name (of user signed into Tableau Server or Tableau Online) Any parameters in the workbook Worksheet Titles: Data Connection Name Data Update Time (Date and Time of data refresh) Page Count Page Name Page Number Default Caption Any field or Action being used to build that worksheet Building a Dashboard Title To build the dashboard title above, here are the steps: Right-click on the dashboard title Select "Edit title" In the dialog box that appears create the title that you require, inserting any of the fields to customise the title from the "Insert" drop down menu. In the above case my title reads: s DashboardAny text placed within is a field being used in the title. You can add any other text around it as you require. Hit "OK" and you are done. Building a Worksheet Title Creating a worksheet title is identical to a dashboard title, but you have more options of fields to add. To generate the worksheet title for the Sales by Customer circle chart above here are the steps: Right click on the worksheet title Select "Edit title" In the dialog box that appears create the title that you require, inserting any of the fields to customise the title from the "Insert" drop-down menu. In the above case, my title reads: for sub-category, category in , - select a circle to view customer sales, hover over a circle to highlight all other orders by the same customer Hit "OK", and you are done If you have any questions, do not hesitate to get in touch. *Sorry to interruptCSS Error There are several ways text can appear on a sheet. You can show titles and captions on any sheet. Another option is to Add tooltips to marks. A legend card appears in the worksheet when you encode marks by dropping them on the Color or Size cards. It's also possible to Add Annotations for a mark, point, or area in the view. These text elements can be customized for text properties like size, color, alignment, and font, as well as element properties like shading and borders. Note: Some of these formatting options are only available in Tableau Desktop. Some parts of the view have their own formatting and editing controls, such as an axis(Link opens in a new window), and the text(Link opens in a new window) like labels and headers. Show titles and other text elements Titles and captions If a title or caption isn't showing, open the Worksheet menu and select Show Title or Show Caption. For dashboards and stories, there are equivalent options in their respective menus (such as Dashboard> Show Title). There is also a check box to toggle the dashboard or story title on or off, available in the left-hand pane. Legends and other elements By default, a legend card is created whenever a field is encoded by color, size, or shape. If a legend is removed or hidden, however, it can be brought back. Open the Analysis menu > Legends and select the desired option. Only legends that are relevant to the view can be selected. That is, if nothing is on the Size shelf, the size legend cannot be turned on. On Worksheets These items can also be toggled by right-clicking anywhere in the grey area of the sheet, such as under the Marks card. For more information about adding elements such as legends, filters, and parameter controls to a worksheet, see Additional Shelves, Legends, Cards, and Controls. Edit titles and captions On a worksheet, hover on the title, click the drop-down arrow on the right-hand side and select Edit Title or Edit Caption from the context menu. Alternatively: Right-click (control-click on Mac) the item you want to change and select Edit.In web editing, double click the worksheet title. Note that captions and legend titles cannot be edited in web editing In the Edit Title dialog box, modify the text and format the font, size, style, color, and alignment. If desired, use the Insert menu to add dynamic text such as sheet properties and field values. To reset a title or caption back to the default, click Reset. Format titles and captions For information on showing or hiding a title, see Titles. On a worksheet, right-click (control-click on Mac) the title, caption, or legend and select Format—for example, Format Title. In the Format pane, use the drop-down lists to change the default shading or border. Edit dashboard titles For information on showing or hiding a title, see Titles. On a dashboard, double-click the title. In the Edit Title dialog box that appears, format the title as you like. You can enter a new title for the dashboard or a description, as well as change the font type, size, emphasis, color, and alignment. You can also type in a website URL and Tableau will automatically create a hyperlink. Note: If you edit the hyperlink, make sure to delete the entire hyperlink and then reenter the new one. If you do not do this, the text of the hyperlink will update, but the URL path will not. When finished, click OK. The dashboard title updates with the changes. Format tooltips Tooltips are details that appear when you rest the pointer over one or more marks in the view. Tooltips also offer convenient tools to quickly filter or remove a selection, select marks that have the same value or view underlying data. You can edit the tooltip to include both static and dynamic text. You can also modify which fields are included in the automatic tooltip. On the Marks card select Tooltip. Tooltips are specified for each sheet and can be formatted using the formatting tools along the top of the Edit Tooltip dialog box. Use the Insert menu at the top of the dialog box to add dynamic text such as field values, sheet properties, and more. Use the formatting tools along the top of the Edit Tooltip dialog box. There are several optional customizations as well. Dynamic text values Use the Insert drop-down list at the top of the dialog box to add dynamic text such as field values, sheet properties, and more. The All Fields option on the Insert menu adds all field names and values that are used in the view. Inserting the All Fields parameter updates the tooltip as you change the view. You can also use the All Fields option to exclude fields. Command buttons Select the Include command buttons option to show filtering and view data options in the tooltip. For example, including command buttons will add Keep Only, Exclude, and View Data buttons to the tooltip. These command buttons are available both in Tableau Desktop and when the view is published to the web or viewed on a mobile device. Unchecking Include command buttons will also hide the aggregation summary if multiple marks are selected. Selection by category Select the Allow selection by category check box to select marks in a view that have the same value by clicking on a discrete field in a tooltip. For more information see Tooltips.

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