

Fun with Buttons and Tooltips

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Creating Buttons in Tableau Desktop

Creating Buttons in Tableau Desktop

- Use a calculated field and dashboard action to create a web button on a dashboard that links to an outside source.



Specializations Headcount

For more detailed views on Programs with Options and Specialties, click the grey buttons below:

International Studies

Modern and Classical Languages, Literatures and Cultures
and Foreign Languages & International Economics

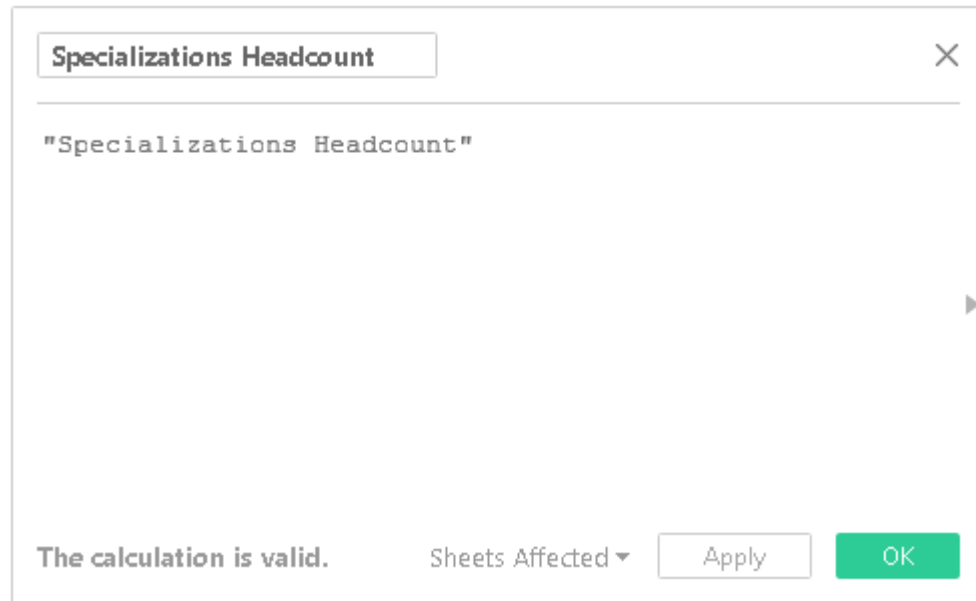
Hispanic Studies

Why Create a Button?

- It's a visually appealing way to direct your users to other workbooks on the subject or a more detailed analysis.
- You can create a landing page for a user with links to relevant workbooks.
- You can direct your user to your website or other websites.

How to Create a Button

- Begin a new sheet.
- Create a calculated field that only contains the title of your button as a string.



How to Create a Button

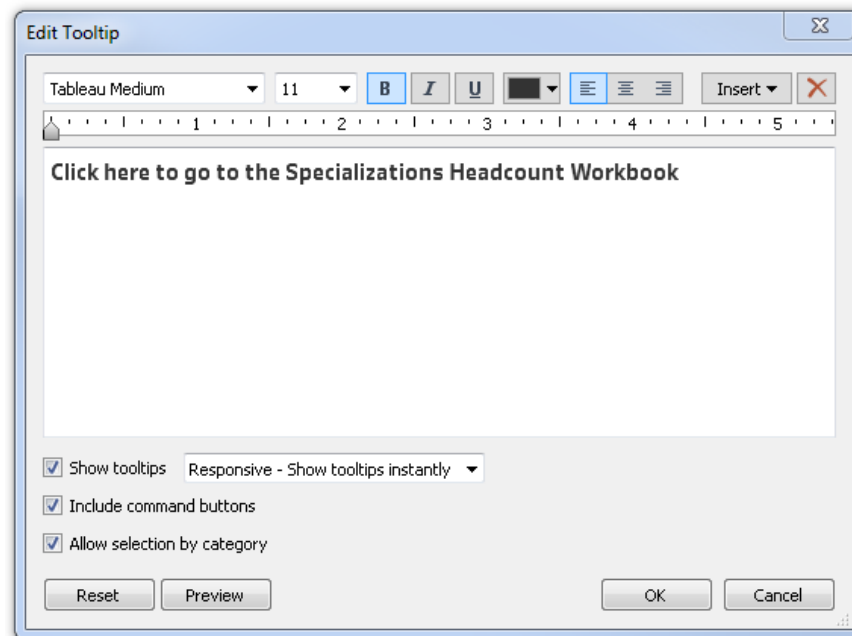
- Drag this field over to the text area of the Marks card.

The screenshot displays the Tableau interface. On the left, the 'Marks' card is expanded, showing a dropdown menu set to 'Automatic'. Below this are six interactive buttons: 'Color', 'Size', 'Text', 'Detail', and 'Tooltip'. At the bottom of the Marks card, a blue pill-shaped button labeled 'Specializations Headcount' is shown, with a small 'T' icon to its left. On the right side of the interface, the 'Columns' and 'Rows' shelves are empty. The main view area shows 'Sheet 1' with the text 'Specializations Headcount' displayed in a large, bold font.



How to Create a Button

- Click on Tooltip in the Marks card and edit the text you'd like the user to see when hovering over the button with their mouse.



How to Create a Button

- Resize and format the field on your sheet to your visual preference.

The screenshot displays the Tableau interface. On the left, the 'Format Specializations Headcount' pane is open, showing the 'Default' section with the following settings: Font: Tableau Book, 16pt; Alignment: Center; Numbers: (empty). The 'Marks' section shows 'Automatic' selected in the dropdown, with buttons for Color, Size, Text, Detail, and Tooltip. A preview of the button 'Specializations Headcount' is shown at the bottom of the pane. On the right, the 'Columns' shelf contains 'Specializations Headcount', and the 'Rows' shelf is empty. The main view shows 'Sheet 1' with the 'Specializations Headcount' button displayed in blue text.



How to Create a Button

- Resize and format the field on your sheet to your visual preference.

The screenshot displays the Tableau interface with the following components:

- Format Shading Pane:** A floating pane on the left with tabs for 'Sheet', 'Rows', and 'Columns'. It is currently set to 'Sheet'. It contains sections for 'Default', 'Total', and 'Grand Total', each with 'Worksheet', 'Pane', and 'Header' dropdown menus. The 'Worksheet' is set to 'None'.
- Marks Card:** Located in the center, it shows a 'Marks' shelf with a 'Specializations Headcount' button. Below the shelf are buttons for 'Color', 'Size', 'Text', 'Detail', and 'Tooltip'.
- Columns and Rows Shelves:** The 'Columns' shelf is empty, and the 'Rows' shelf is empty.
- Sheet View:** On the right, 'Sheet 1' is visible, containing a blue button labeled 'Specializations Headcount'.

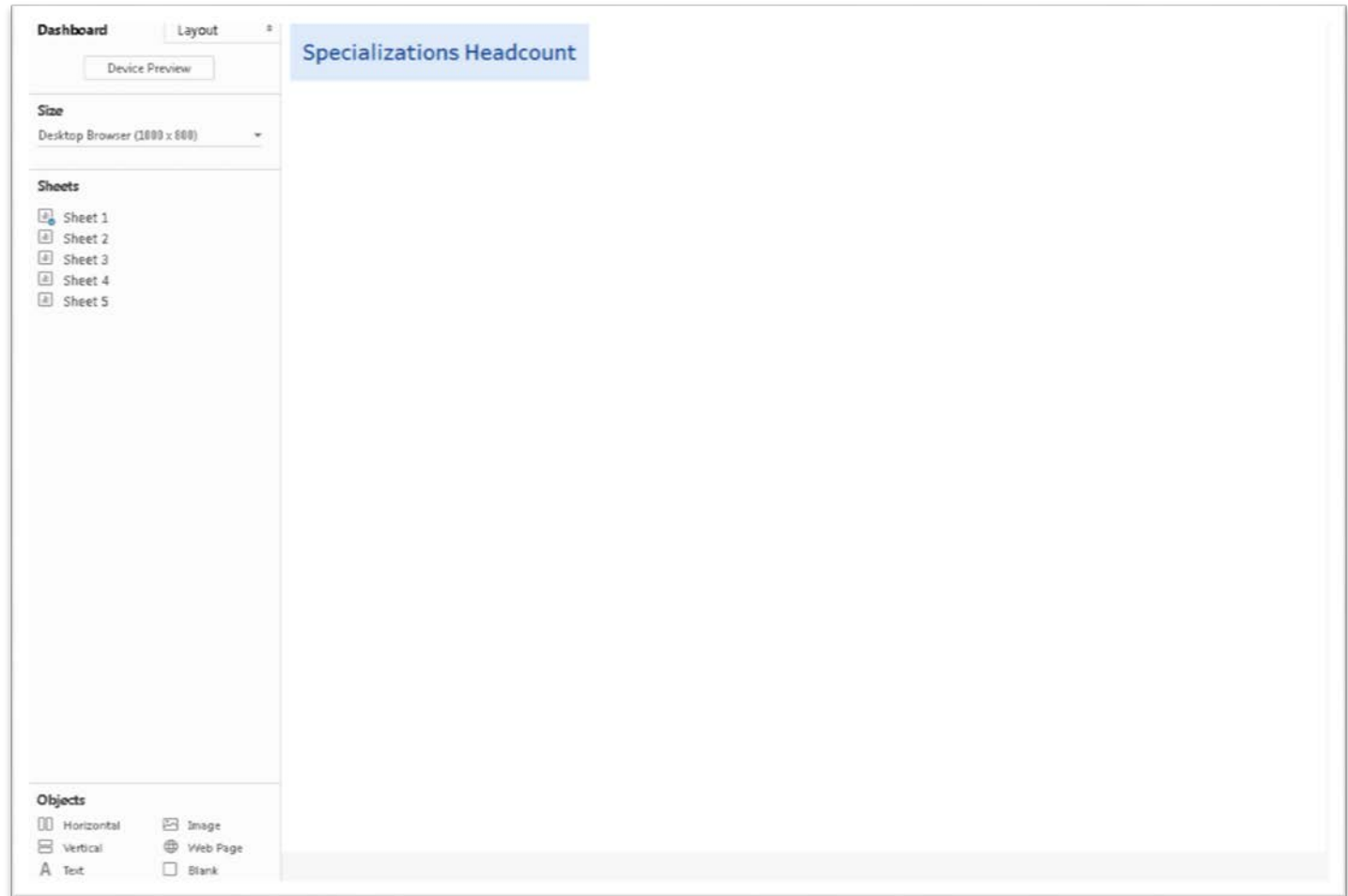


How to Create a Button

- Create a new Dashboard (or navigate to an existing one).
- Drag the sheet that contains your button text to the dashboard and place it where you want it.
- Resize the sheet so that it fits your button as tightly as possible.

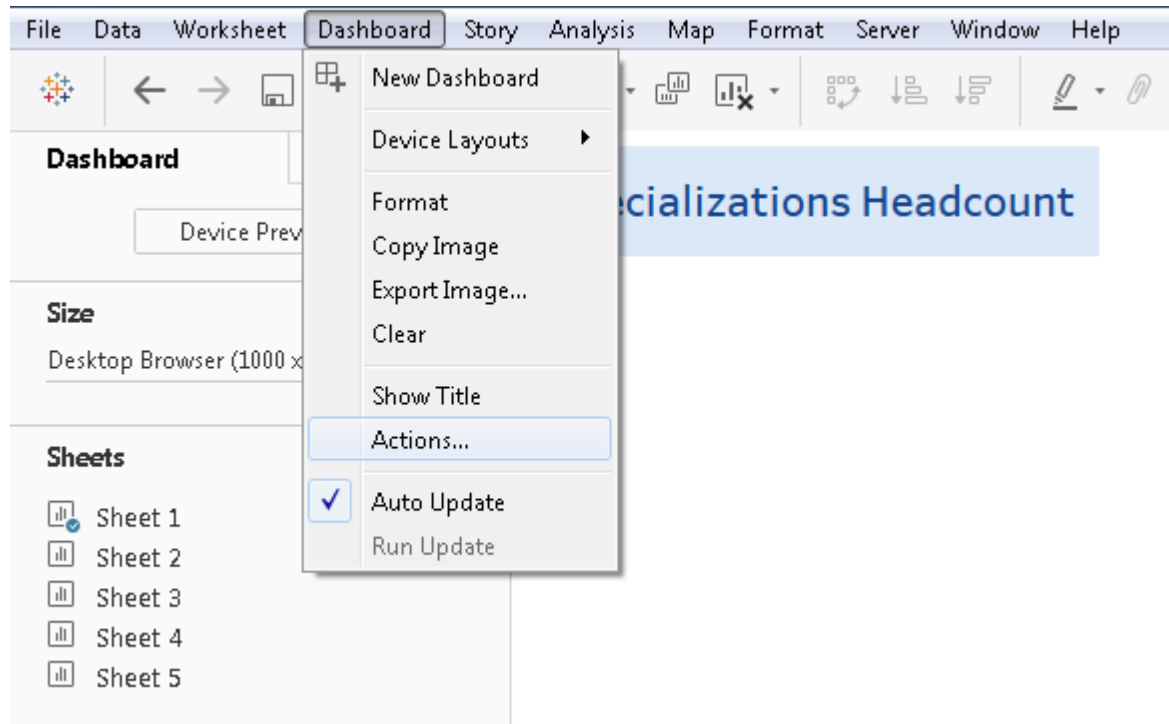


How to Create a Button



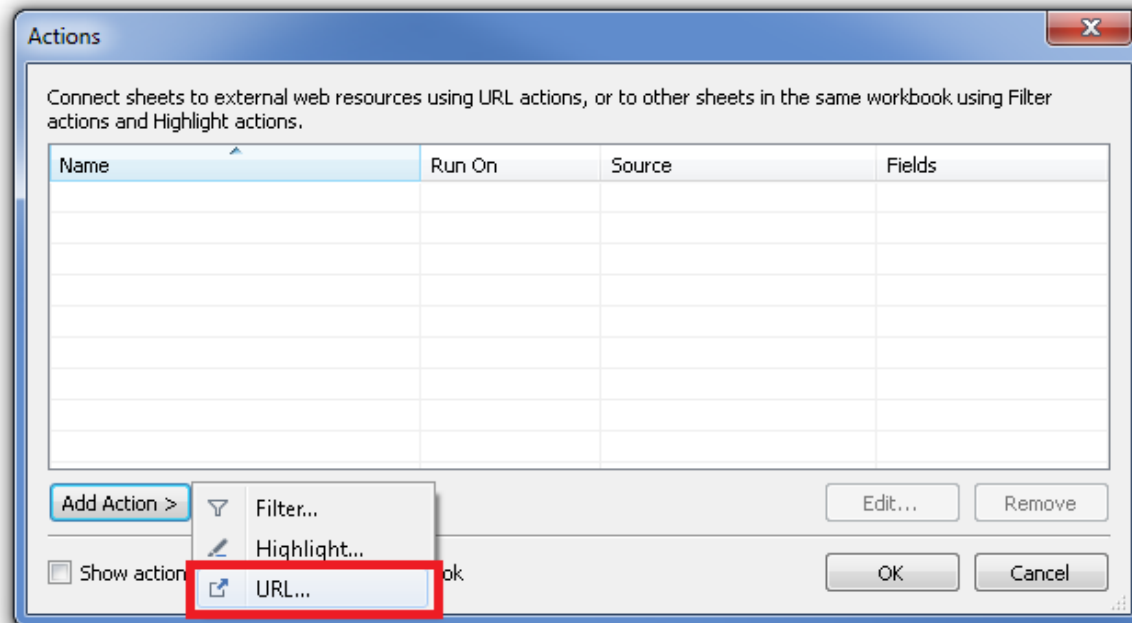
How to Create a Button

- Click on Dashboard in the top menu and select Actions...



How to Create a Button

- Click Add Action >
- Select URL...



How to Create a Button

- Name the action (same name as your button is recommended).
- Make sure only the sheet with your button is checked.
- Choose Select for Run action on:
- Paste the URL you'd like the button to link to.
- Click OK.



How to Create a Button

Add URL Action

Name: Specializations Headcount

Source Sheets:

Dashboard 1

Run action on:

Sheet 1

Hover

Select

Menu

URL

alytics.uky.edu/#/views/MajorMinorDemographicsandStudentRosters/StudentCount?:iid=2

Test Link <https://analytics.uky.edu/#/views/MajorMinorDemographicsandStuden>

URL Options

URL Encode Data Values

Allow Multiple Values

Item Delimiter: ,

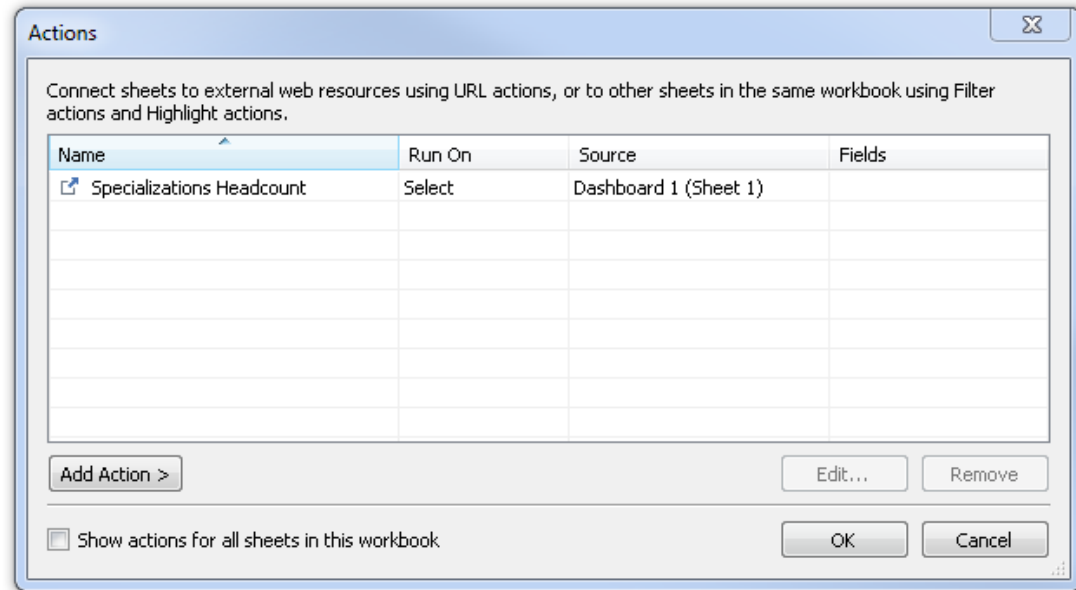
Delimiter Escape: \

OK Cancel



How to Create a Button

- You will see the name of the action you just created in the Actions list.
- Click OK.



How to Create a Button

- You're finished! The button is now active.



Specializations Headcount

Click here to go to the Specializations Headcount Workbook



Make a Text Box Display a Tooltip

Make a Text Box Display a Tooltip

- Use a sheet to create a text box on your dashboard that functions as a tooltip, changing dynamically as the user interacts with your data.

Academic Term

Fall 2017

Primary Student College

Arts and Sciences

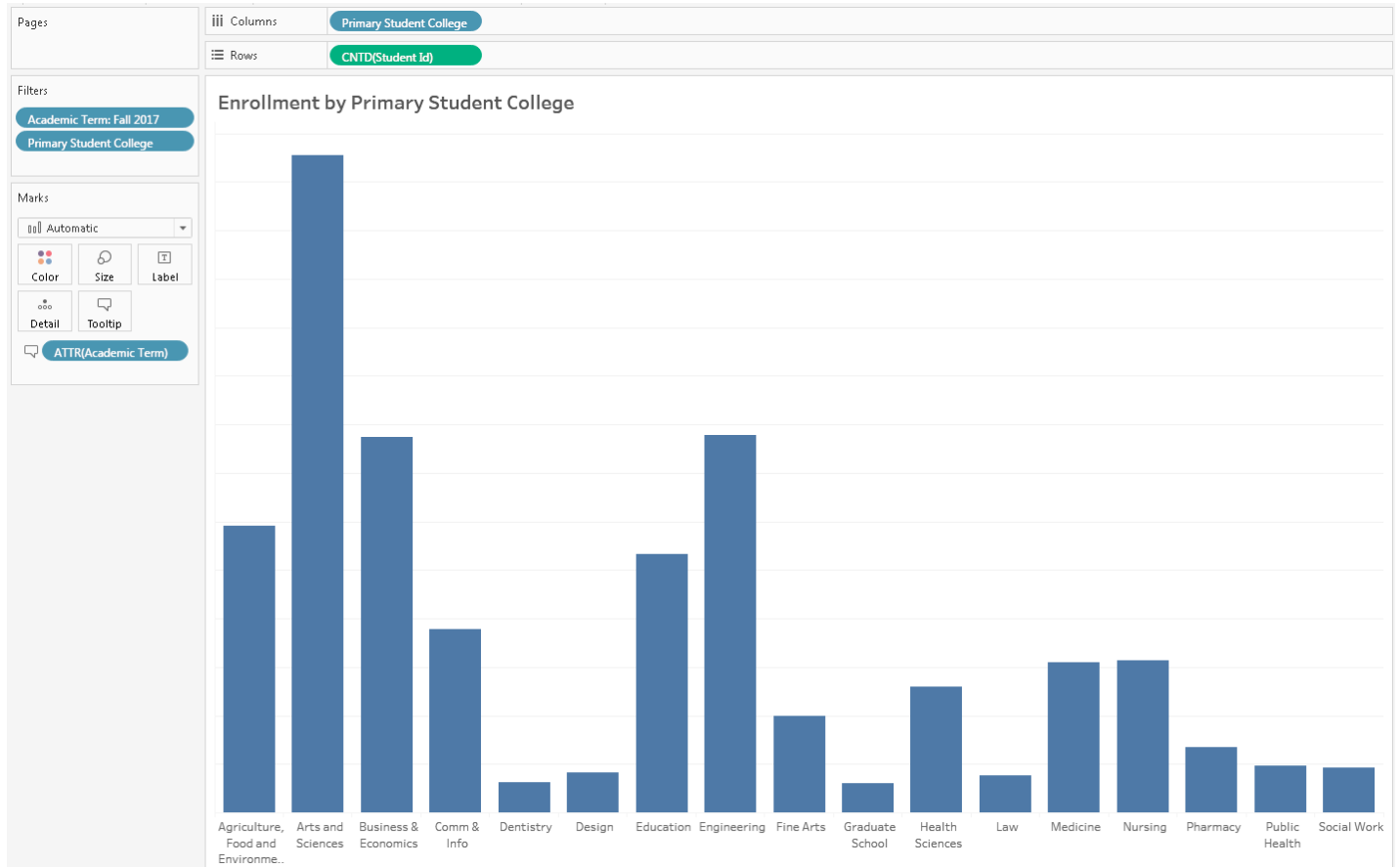
In Fall 2017 there are 6,778 students enrolled in the College of Arts and Sciences.

Why Make a Text Box Display a Tooltip?

- If you have a complex graph or want to display a number of metrics for a given point on a graph, a text box is more user friendly than a tooltip on hover.
- Dynamic fields encourage user interactivity.
- You can use the text box to display detailed information and a visualization to show the overall view of your data.

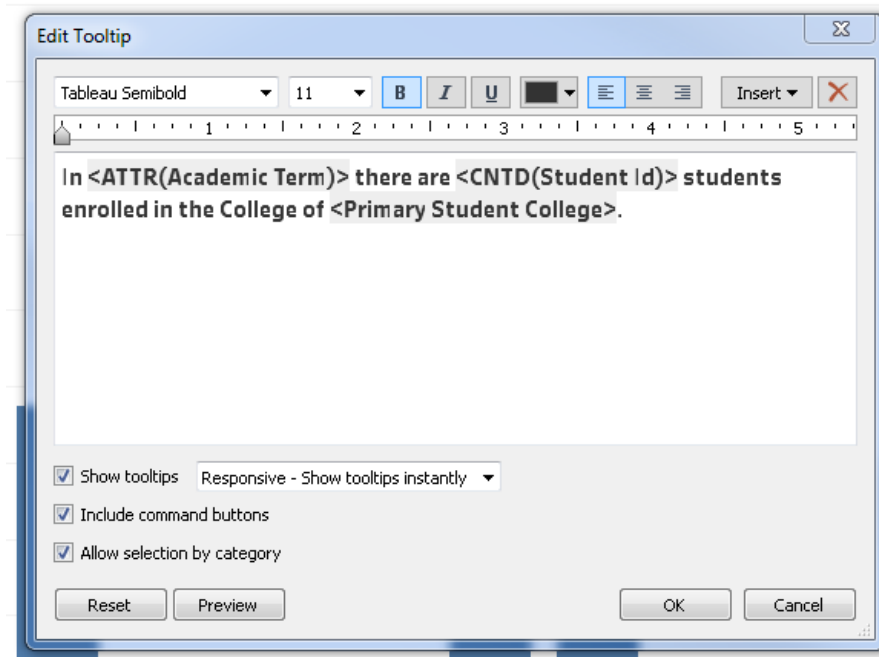
How to Create a Tooltip Text Box

- Create your graph.



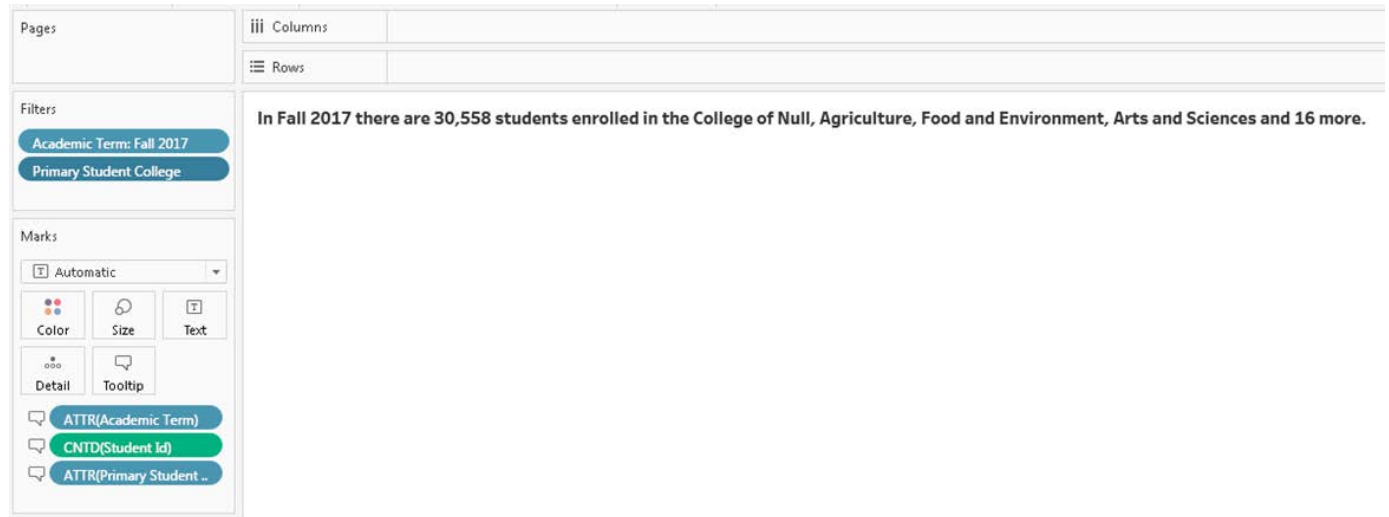
How to Create a Tooltip Text Box

- Edit the Tooltip in the Marks card so that it displays the text you want.



How to Create a Tooltip Text Box

- Duplicate your sheet.
- Copy and paste the Tooltip text in the title.
- Drag all dimensions and measures from Columns and Rows to Tooltip in the Marks card.



The screenshot displays the Tableau interface for configuring a tooltip. On the left, the 'Marks' card is set to 'Automatic'. Below it, the 'Detail' and 'Tooltip' sections are visible. The 'Detail' section contains three fields: 'ATTR(Academic Term)', 'CNTD(Student Id)', and 'ATTR(Primary Student ...)'. The 'Tooltip' section is currently empty. The main view shows a text box with the text: 'In Fall 2017 there are 30,558 students enrolled in the College of Null, Agriculture, Food and Environment, Arts and Sciences and 16 more.'



How to Create a Tooltip Text Box

- Show the filters you want your end user to manipulate.

The screenshot displays a data visualization interface with a central text box and filter controls. The text box contains the sentence: "In Fall 2017 there are 6,778 students enrolled in the College of Arts and Sciences." To the right of the text box is a vertical panel with two dropdown menus: "Academic Term" set to "Fall 2017" and "Primary Student College" set to "Arts and Sciences". Below these menus is a small "Abc" label. On the left side, a "Filters" panel is open, showing two active filters: "Academic Term: Fall 2017" and "Primary Student College: ...". A context menu is open over the "Primary Student College" filter, listing options: "Edit Filter...", "Show Filter" (checked), "Clear Filter", "Add to Context", "Apply to Worksheets", "Create Set...", "Dimension" (selected), "Attribute", "Measure", and "Remove".



How to Create a Tooltip Text Box

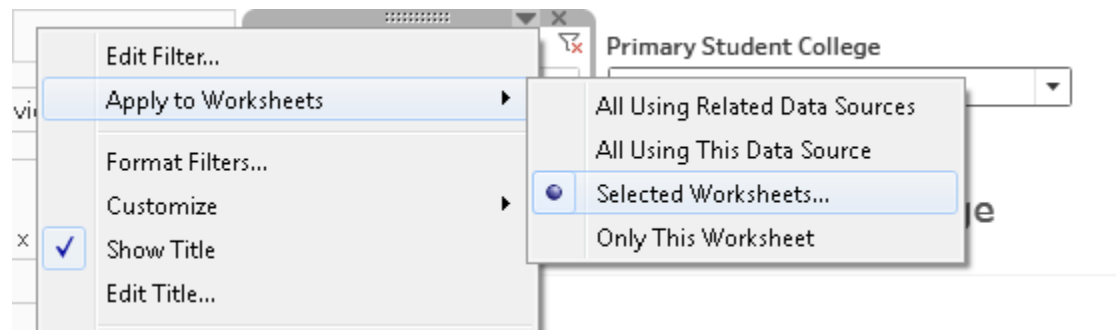
- Select Area on the Marks card to get rid of the “Abc” on your sheet.

The screenshot displays a Tableau worksheet with a text box containing the text "In Fall 2017 there are 6,778 students enrolled in the College of Arts and Sciences." The text box is set to the "Area" mark type. A red circle highlights the text "Abc" in the bottom right corner of the text box, indicating the default placeholder text. The Marks card is open, showing the "Area" mark type selected. The Marks card also shows the "Color", "Size", "Label", "Detail", and "Tooltip" options. The "Detail" shelf contains three fields: ATTR(Academic Term), CNTD(Student Id), and ATTR(Primary Student ..). The "Columns" and "Rows" shelves are empty. The "Academic Term" dropdown is set to "Fall 2017" and the "Primary Student College" dropdown is set to "Arts and Sciences".



How to Create a Tooltip Text Box

- Add your text sheet to a dashboard adjacent to the chart it references.
- Make sure that all filters will filter both your text sheet and your chart appropriately.
 - Academic Term filters all sheets, but Primary College only filters my text sheet.



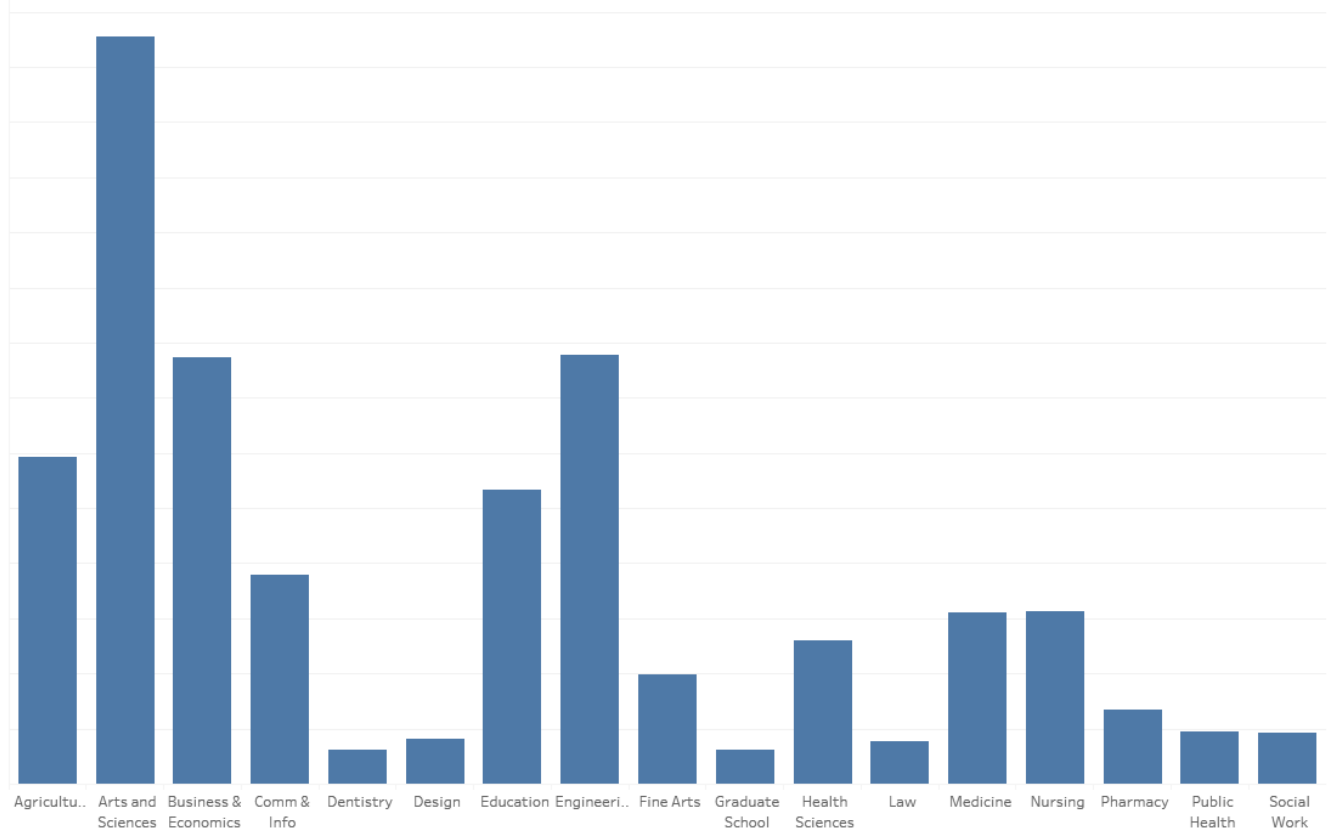
How to Create a Tooltip Text Box

- You're finished!

Academic Term: Primary Student College:

In Fall 2017 there are 6,778 students enrolled in the College of Arts and Sciences.

Enrollment by Primary Student College



Questions?

Contact Michelle Combs at
michelle.combs@uky.edu or 257-3593

Click [here](#) for a Tableau Workbook
with the presentation examples.

