Fun with Buttons and Tooltips

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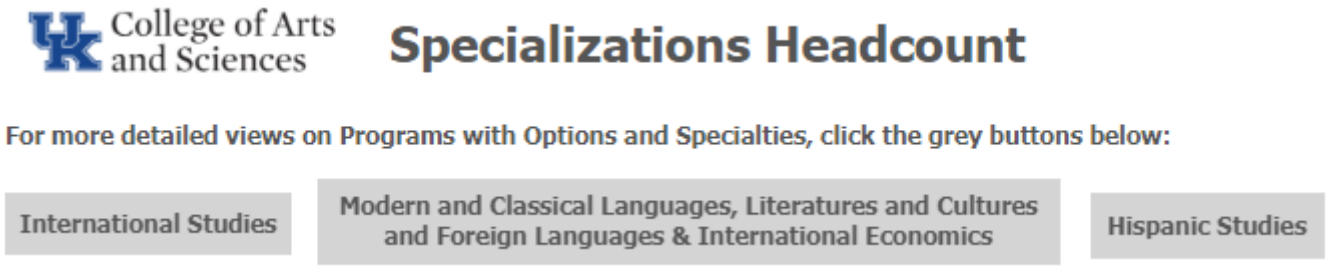
Tableau Open Labs – October 6, 2017

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.



Why Create a Button?

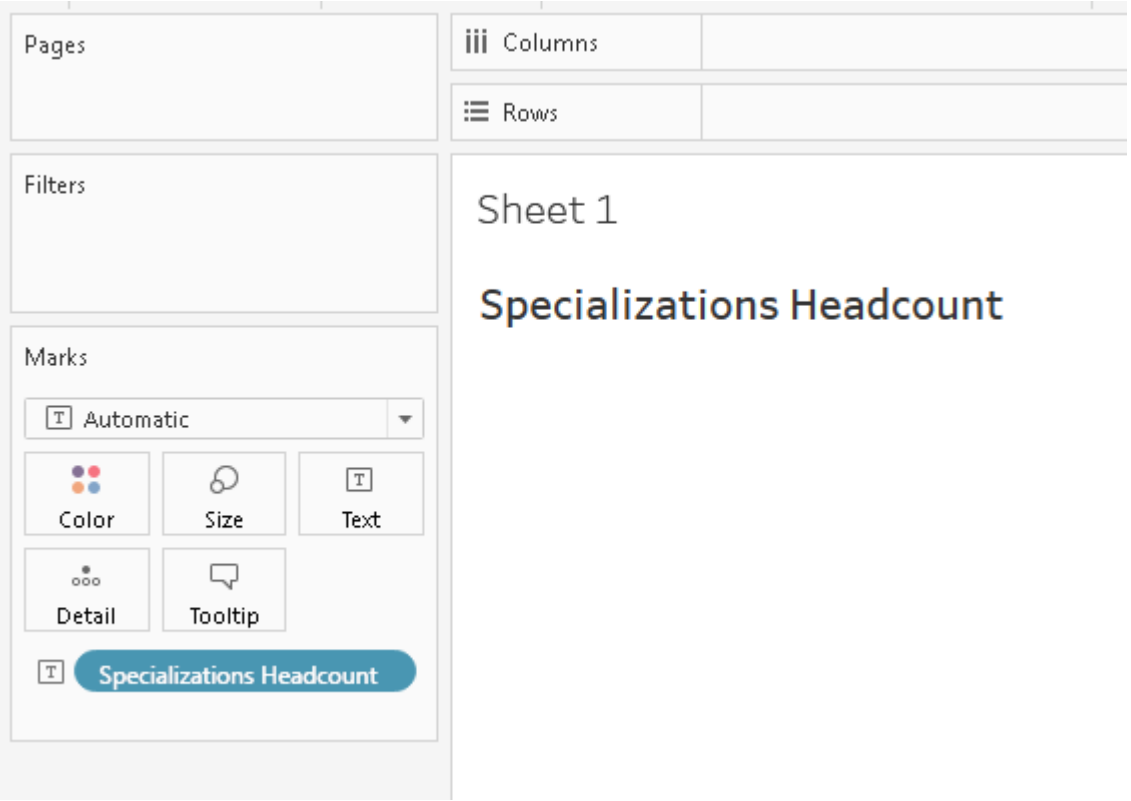
- It’s a visually appealing way to direct your users to other workbooks on the subject or a more detailed analysis.
- You can create a landing page for a user with links to relevant workbooks.
- You can direct your user to your website or other websites.

How to Create a Button

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

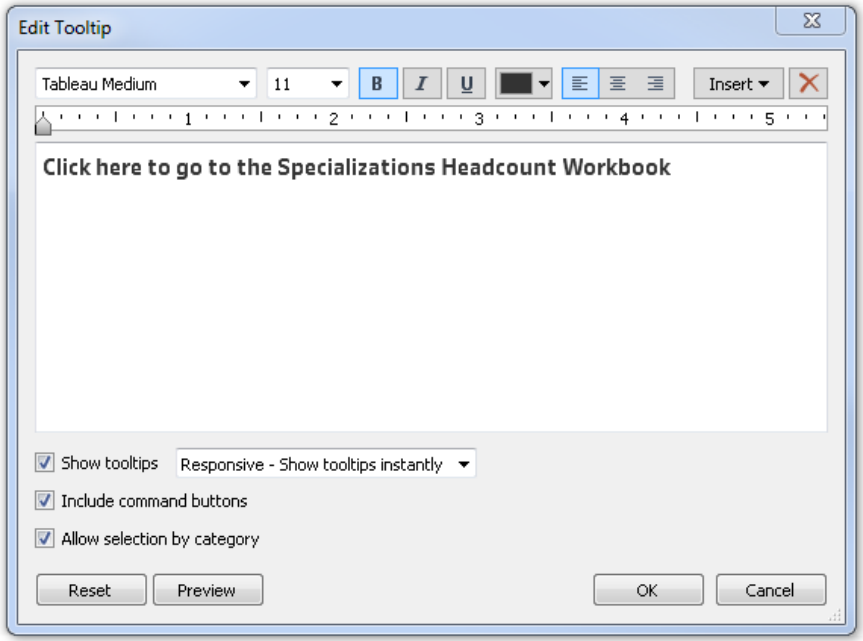
How to Create a Button

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



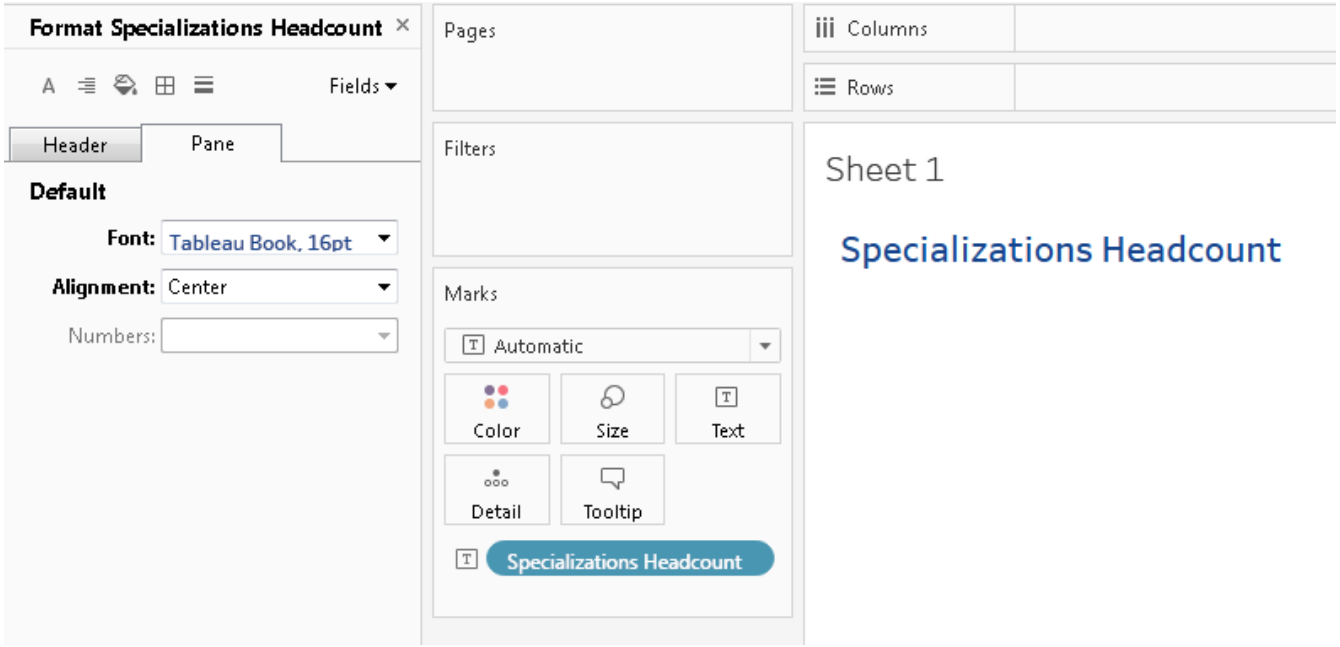
How to Create a Button

- 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.



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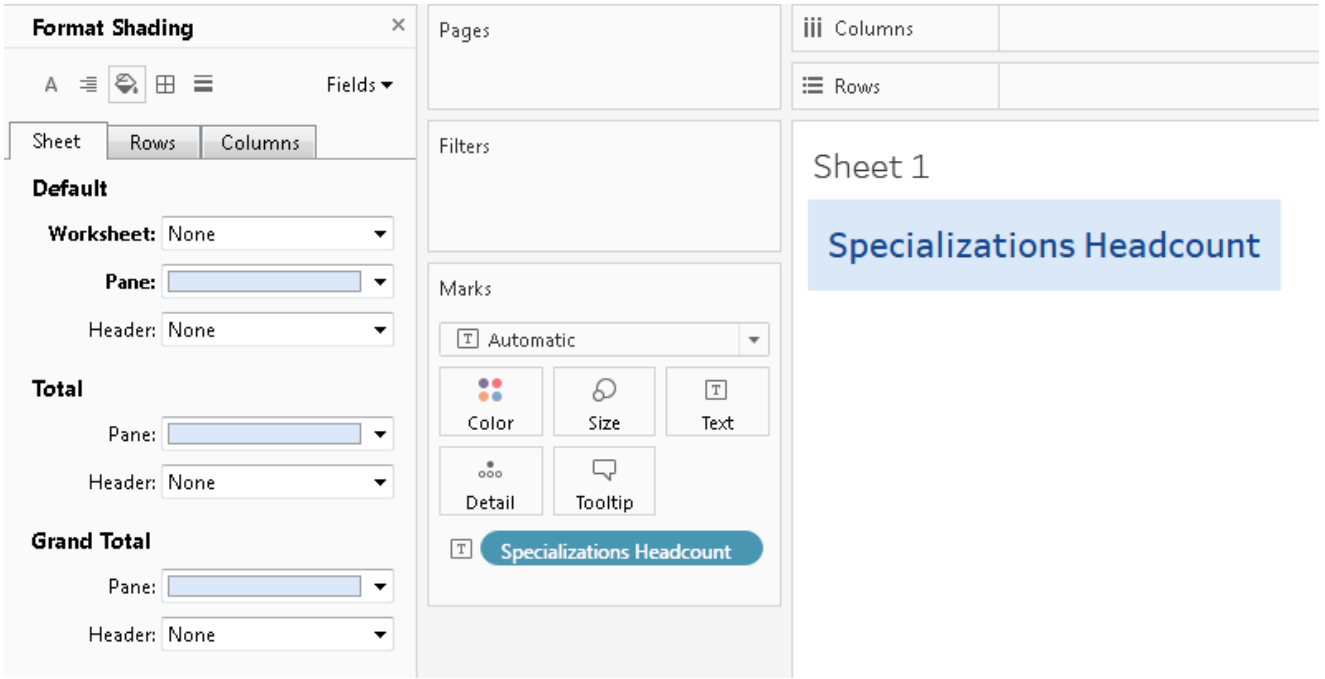
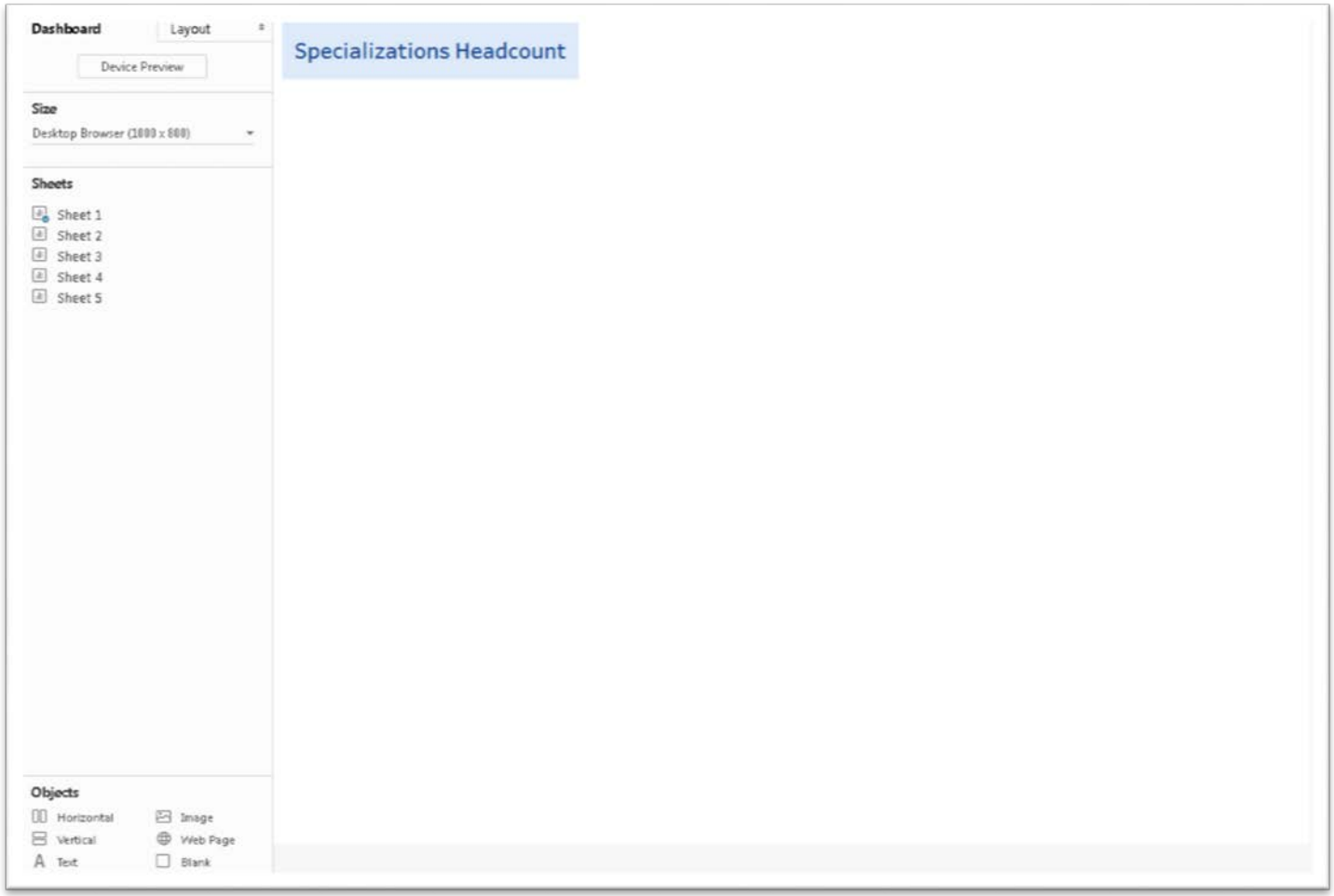


How to Create a Button

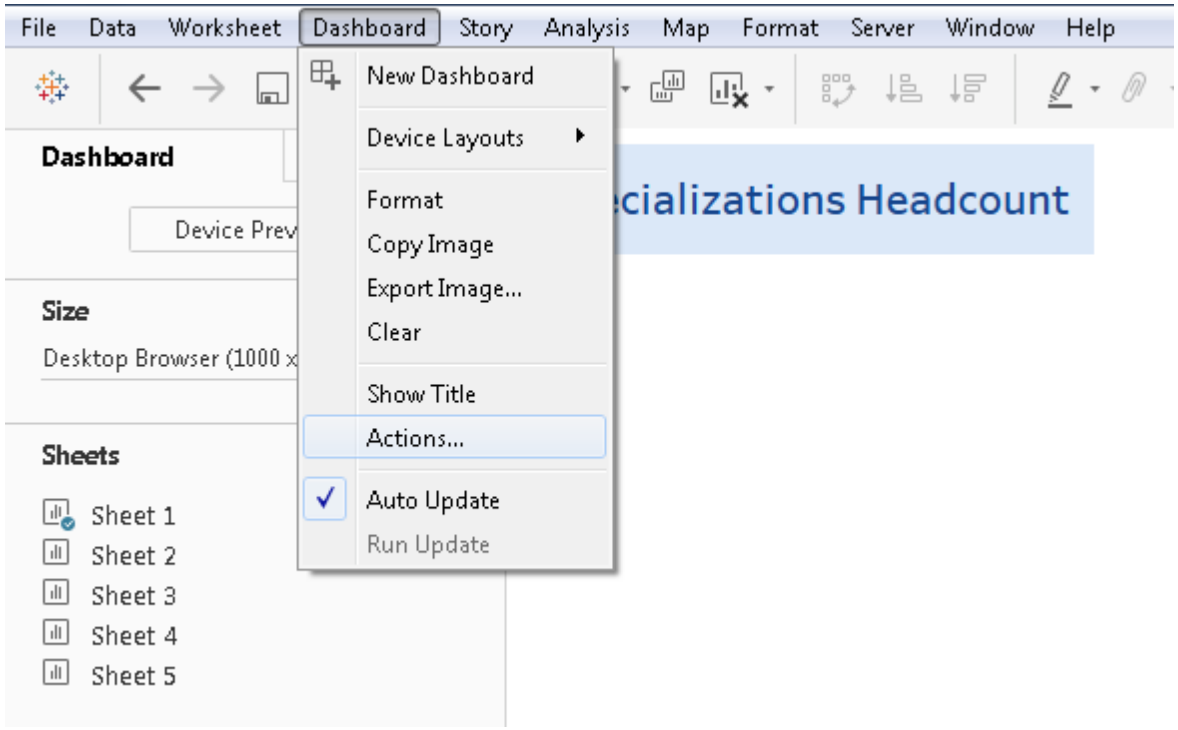
- Create a new Dashboard (or navigate to an existing one).
- Drag the sheet that contains your button text to the dashboard and place it where you want it.
- Resize the sheet so that it fits your button as tightly as possible.

How to Create a Button



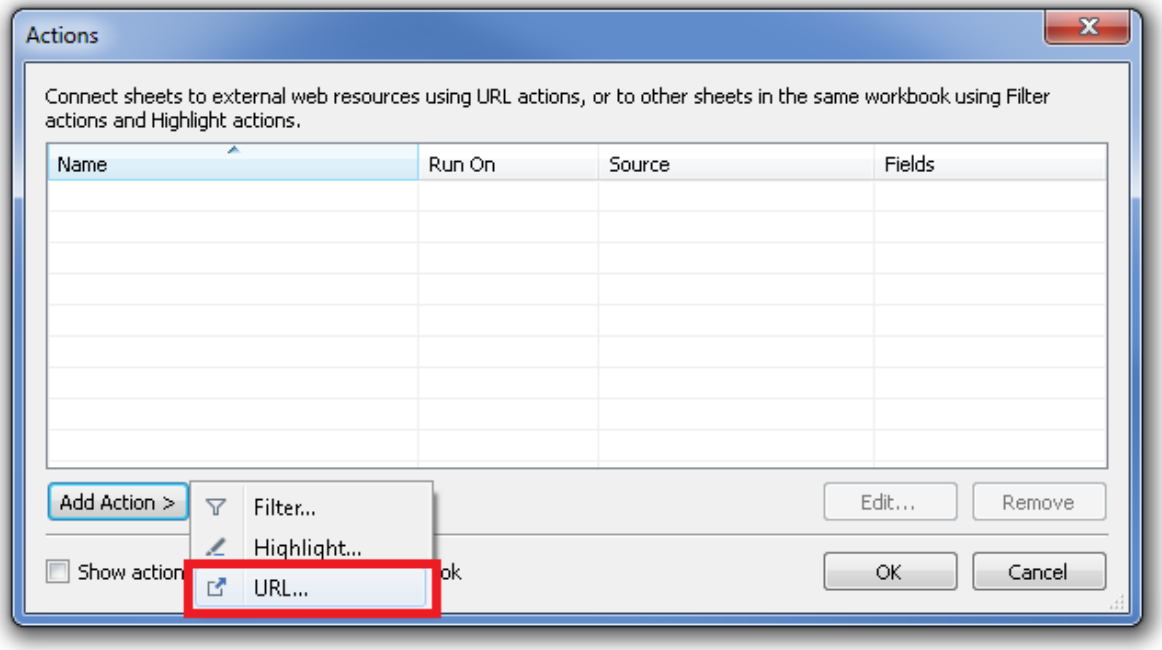
How to Create a Button

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



How to Create a Button

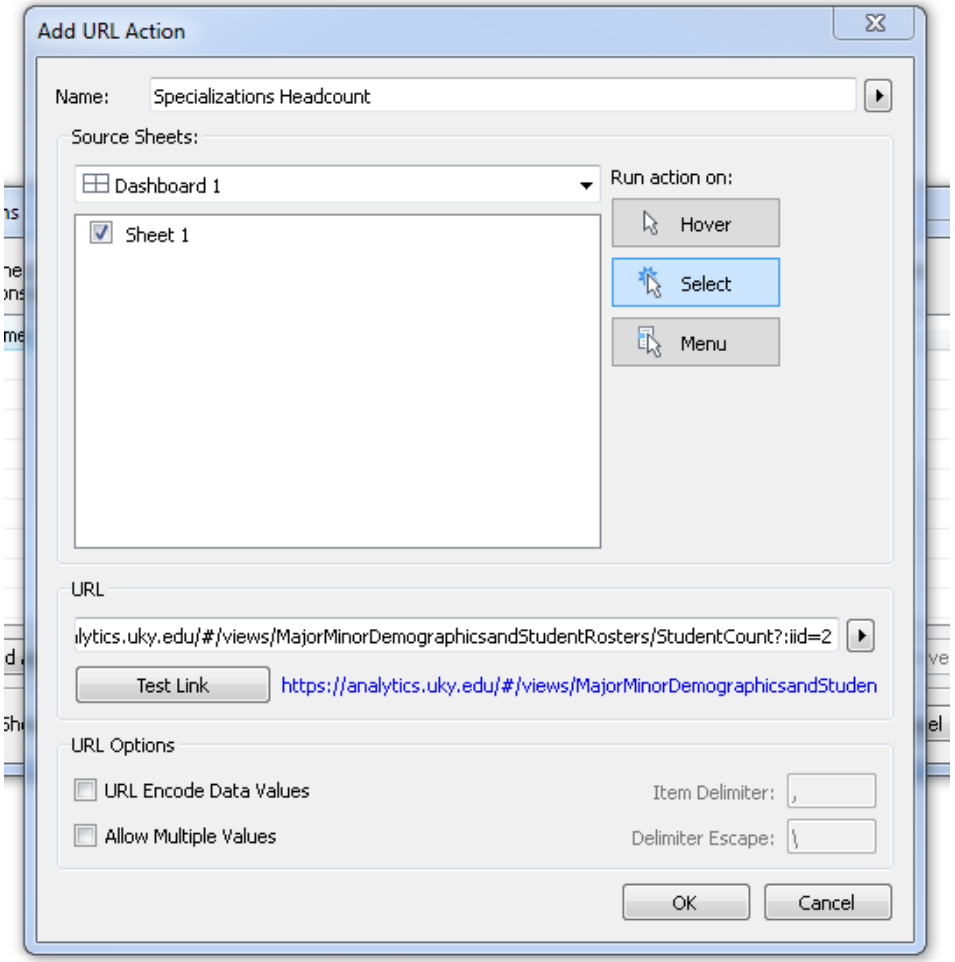
- Click Add Action >
- Select URL…



How to Create a Button

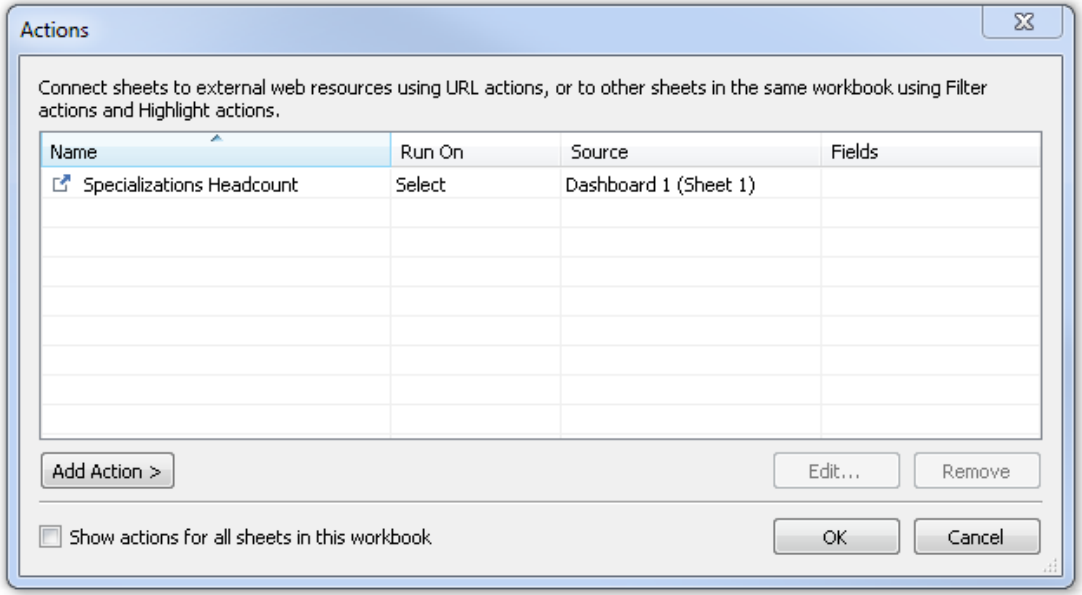
- Name the action (same name as your button is recommended).
- Make sure only the sheet with your button is checked.
- Choose Select for Run action on:
- Paste the URL you'd like the button to link to.
- Click OK.

How to Create a Button



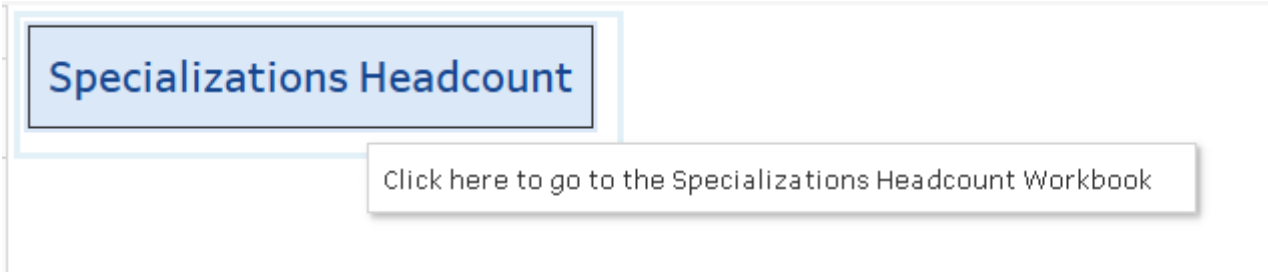
How to Create a Button

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



How to Create a Button

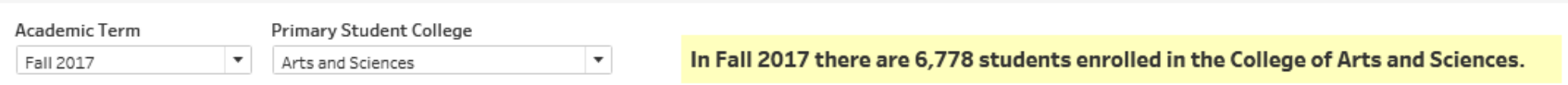
- You’re finished! The button is now active.



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.

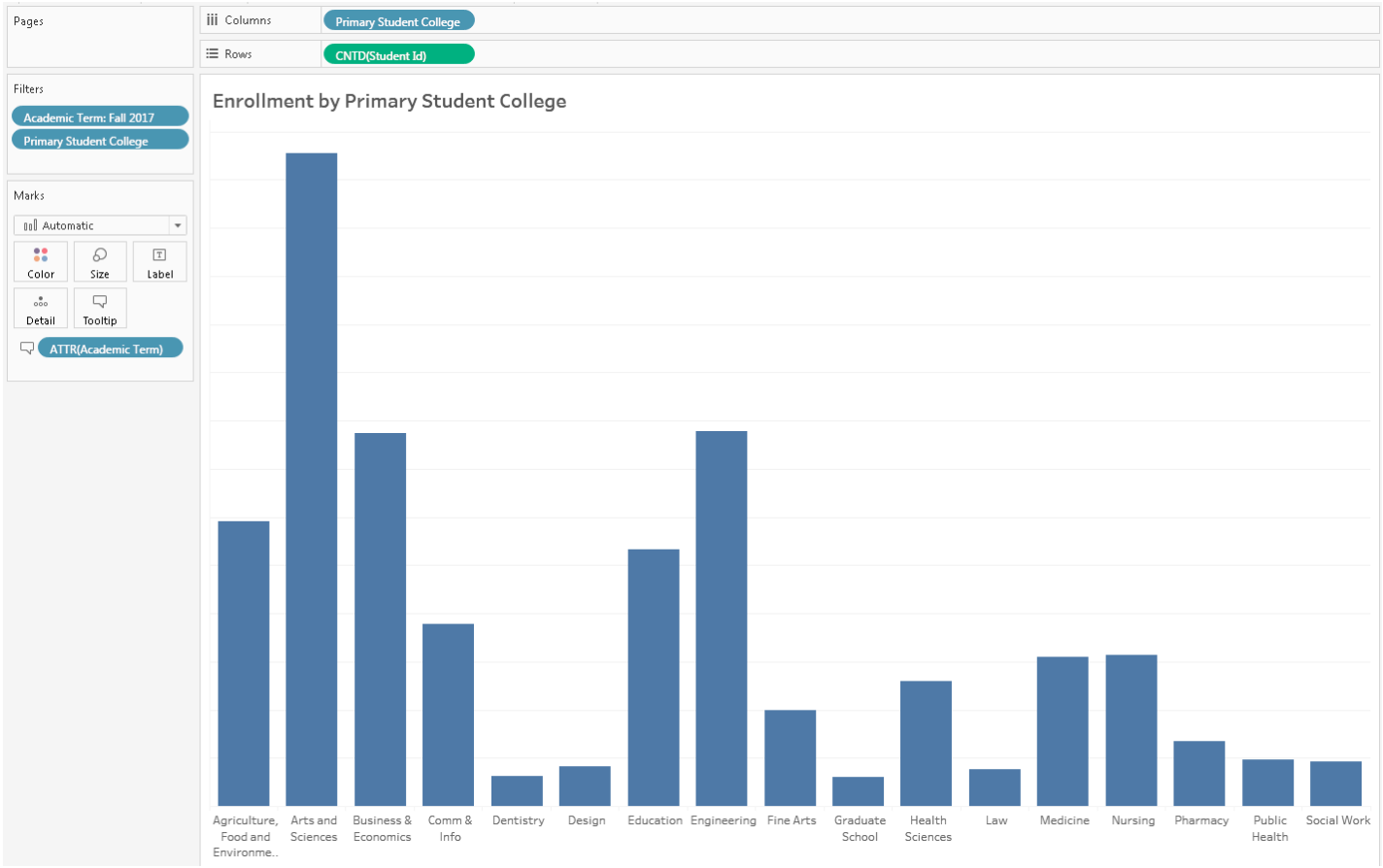


Why Make a Text Box Display a Tooltip?

- 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.

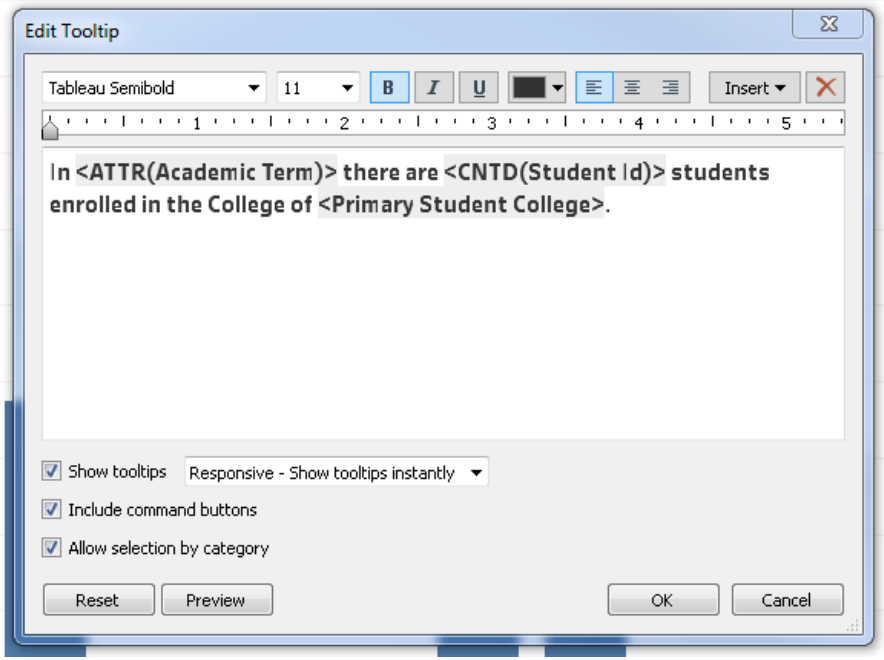
How to Create a Tooltip Text Box

- Create your graph.



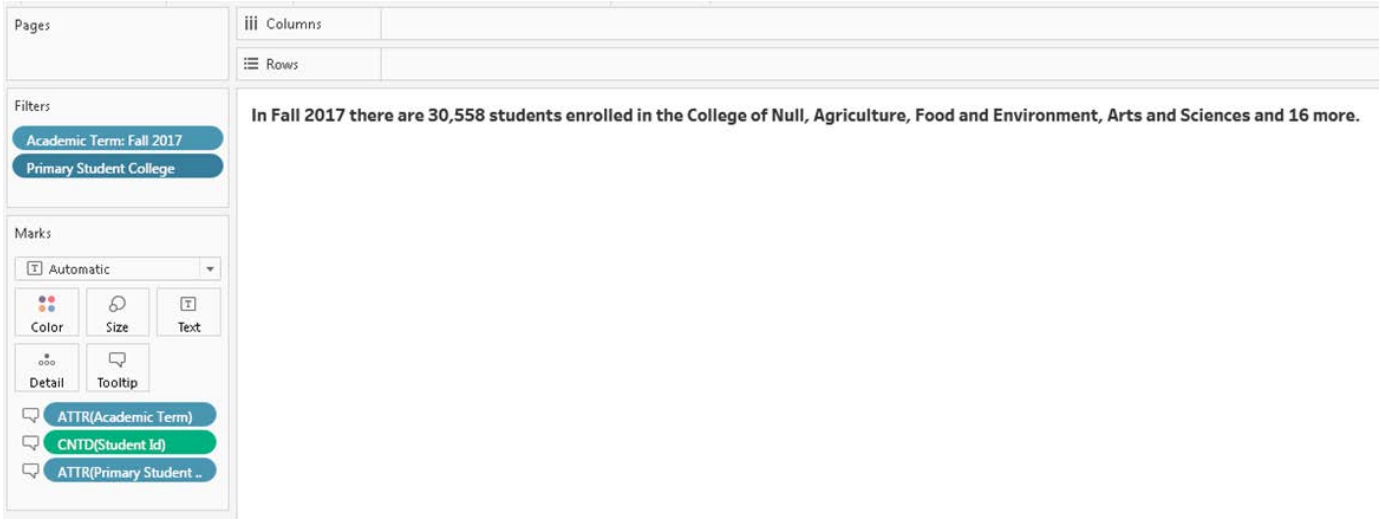
How to Create a Tooltip Text Box

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



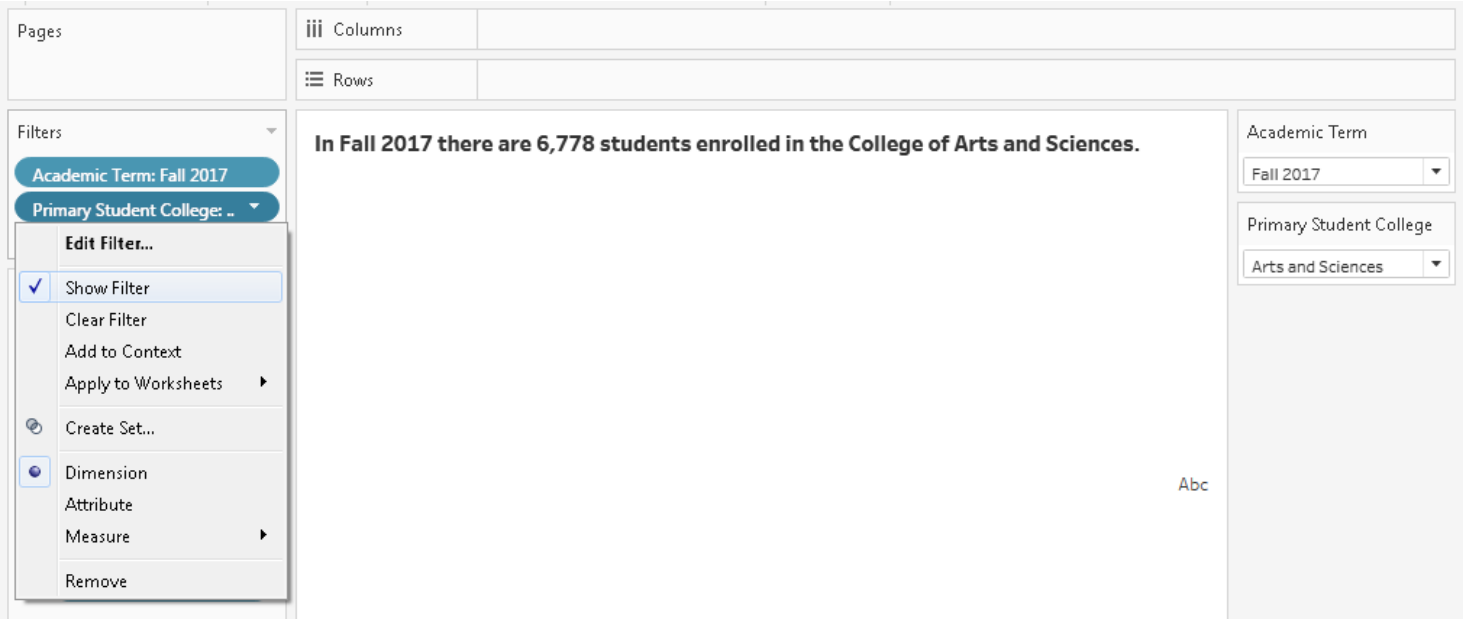
How to Create a Tooltip Text Box

- 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.



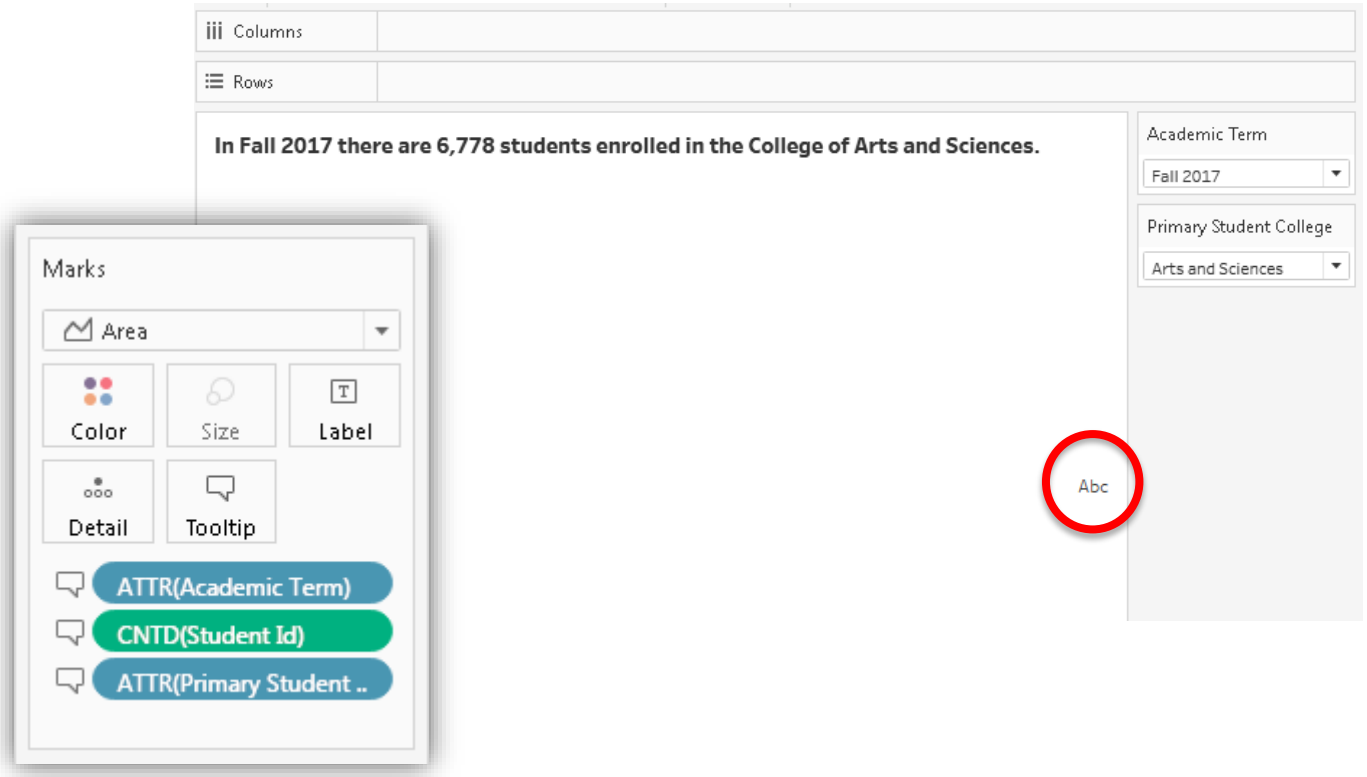
How to Create a Tooltip Text Box

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



How to Create a Tooltip Text Box

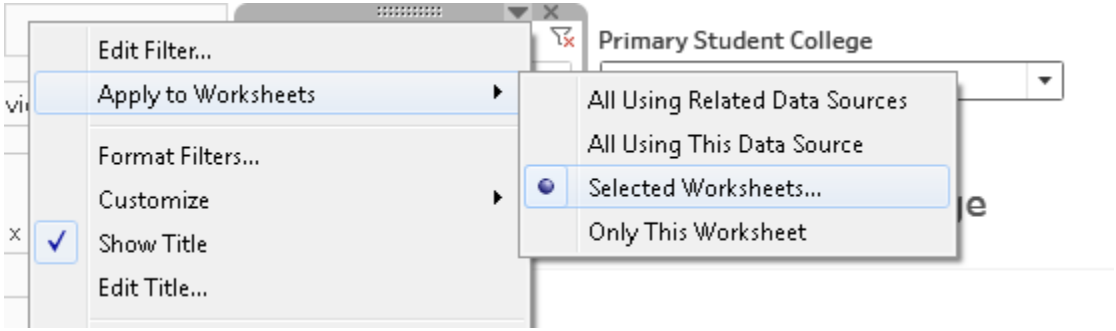
- Select Area on the Marks card to get rid of the “Abc” on your sheet.



How to Create a Tooltip Text Box

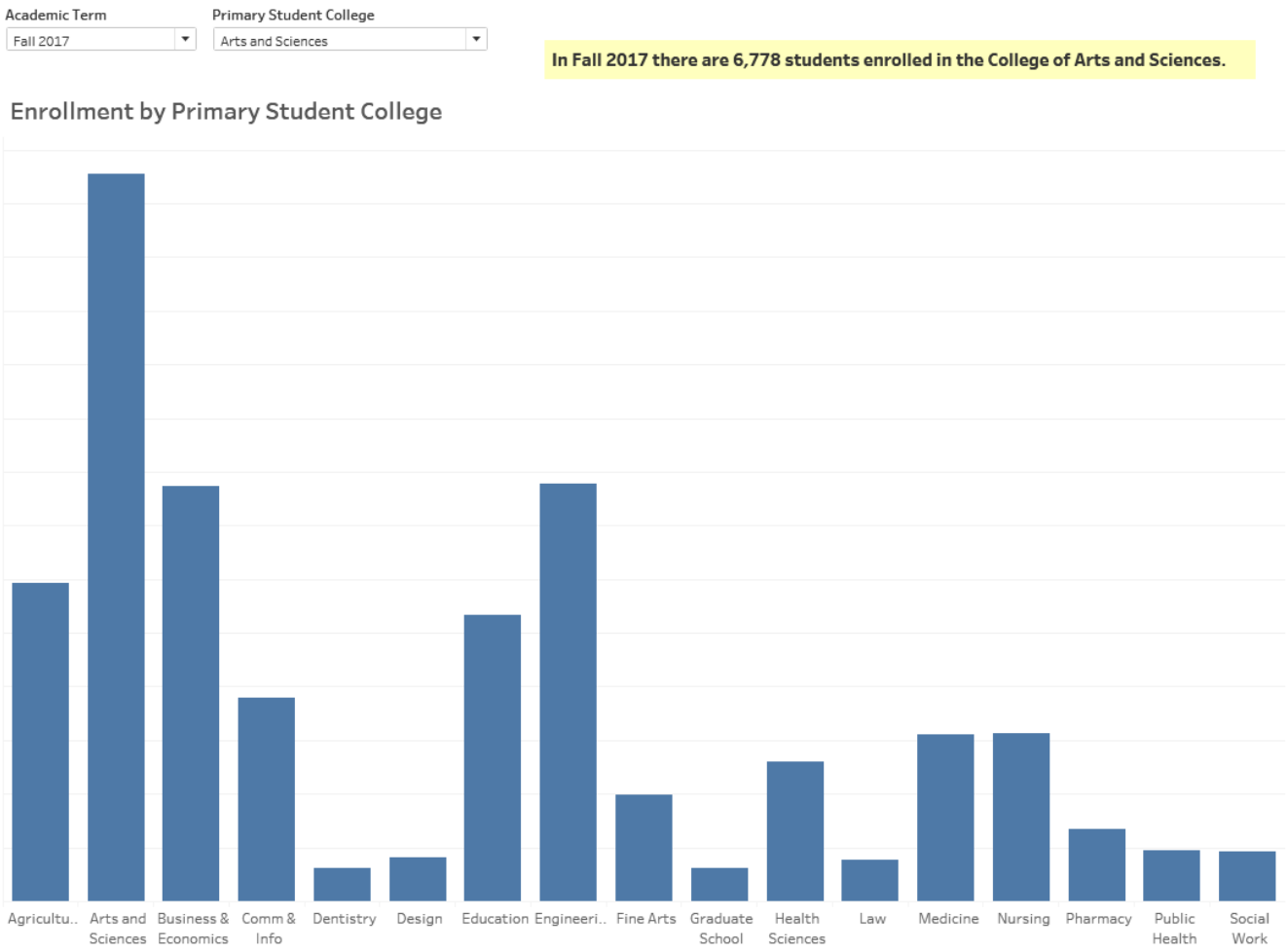
- Add your text sheet to a dashboard adjacent to the chart it references.

- 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!



Questions?

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

Click here for a Tableau Workbook
with the presentation examples.

University of Kentucky