

Tableau Desktop

Tips and Tricks

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Topics we'll cover

- How to create text that switches with your parameter selection
- How to create a parameter that filters for the same field across multiple data sources
- How to create a help icon by importing an image into Tableau

Parameter Text

- Nice to have words next to parameter control to explain definitions, business rules, etc. (think *Enrollment & Incoming Students* workbooks)
- Essentially the same as the calculated field you need to create with the parameter
- Instead of variables, use text

Parameter

CPE Classification Level

Undergraduate

Graduate

Calculated Field 1

Selected CPE Classification Level

```

case [CPE Classification Level]
when 'Undergraduate' then [Is Undergraduate Cpe]
when 'Graduate' then [Is Graduate Cpe Ipede]
END
    
```

The calculation is valid.

Apply OK

Calculated Field 2

Selected CPE Classification Level Text

```

case [CPE Classification Level]
when 'Undergraduate' then 'This is the enrollment of Undergraduates.'
when 'Graduate' then 'This is the enrollment of Graduates.'
END
    
```

The calculation is valid.

Apply OK

Parameter Text

- Add Calculated Field 2 to the text label on a new blank worksheet
- Place worksheet with text next to parameter control on dashboard (hide the title)

The screenshot shows the Tableau interface. On the left is the Marks card with the following options: Automatic (selected), Color, Size, Text, Detail, and Tooltip. At the bottom of the Marks card is a pill labeled "Selected CPE ..". To the right of the Marks card is a text label titled "Enrollment Text" with the text "This is the enrollment of Undergraduates." below it.

The screenshot shows a parameter control titled "CPE Classification Level". It has two radio buttons: "Undergraduate" (which is selected) and "Graduate". To the right of the radio buttons is the text "This is the enrollment of Undergraduates." Below this text is a blue-bordered box containing the number "22,674".

The screenshot shows a parameter control titled "CPE Classification Level". It has two radio buttons: "Undergraduate" and "Graduate" (which is selected). To the right of the radio buttons is the text "This is the enrollment of Graduates." Below this text is a blue-bordered box containing the number "7,160".

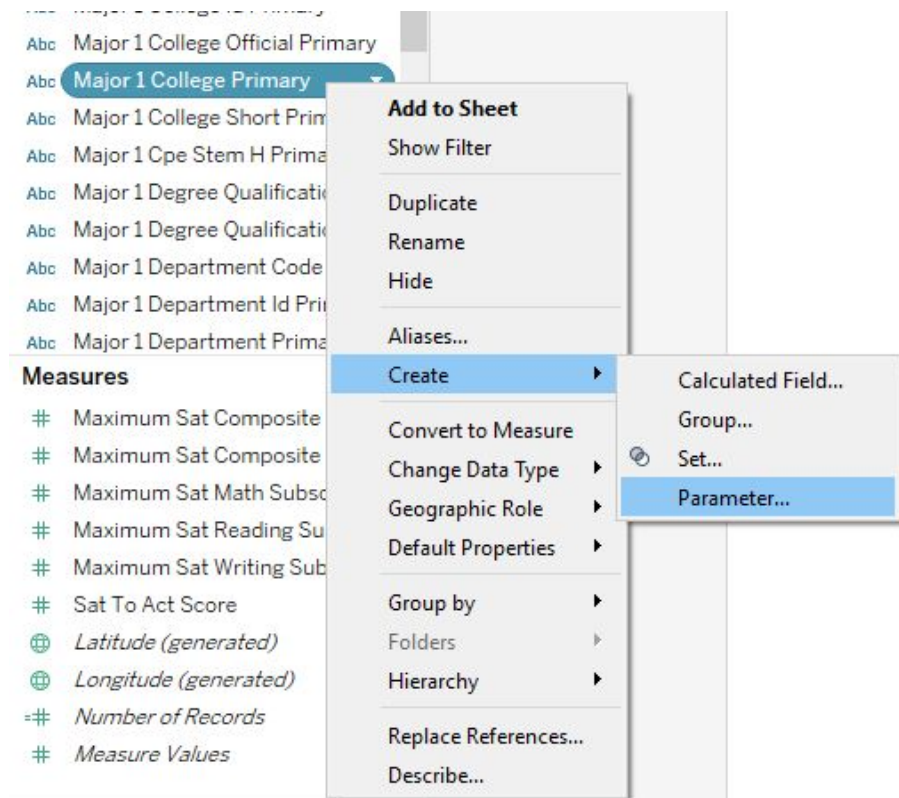
Parameter for Multiple Data Sources

- Convenient when displaying data from multiple sources - allows you to filter all sheets for the same field like year, college, etc. (think *College Budget Meeting* workbook)
- Start by creating desired sheets using appropriate data sources

Enrolled Students	Retention Rates								Degrees
	Cohort Term								
30,761	Fall 2008	Fall 2009	Fall 2010	Fall 2011	Fall 2012	Fall 2013	Fall 2014	Fall 2015	7,224
2nd Fall Retention Rate	80.3%	81.8%	81.5%	81.3%	82.5%	82.2%	82.7%	81.7%	
Avg. Is Graduated 6 Years..	60.2%	61.3%	63.6%						

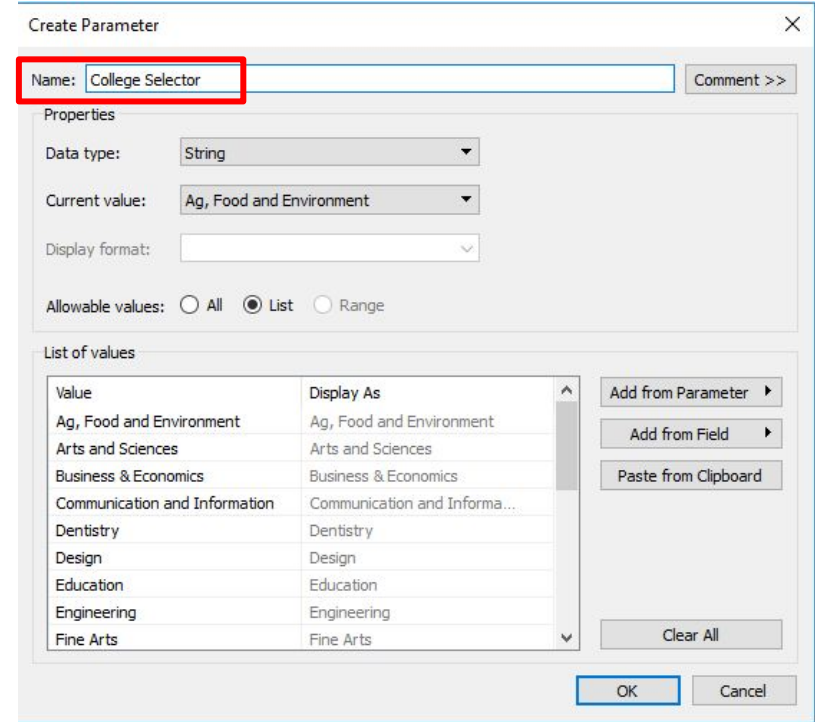
Parameter for Multiple Data Sources

- Choose field in one of the data sources to turn into the parameter
 - This is where it is important to know that fields with similar information have the same outputs across data sources! (Ag, Food, and Environment vs. Agriculture, Food, and Environment)



Parameter for Multiple Data Sources

- Rename parameter to be more universal across data sources



Create Parameter ✕

Name: College Selector Comment >>

Properties

Data type: String ▾

Current value: Ag, Food and Environment ▾

Display format: ▾

Allowable values: All List Range

List of values

Value	Display As
Ag, Food and Environment	Ag, Food and Environment
Arts and Sciences	Arts and Sciences
Business & Economics	Business & Economics
Communication and Information	Communication and Informa...
Dentistry	Dentistry
Design	Design
Education	Education
Engineering	Engineering
Fine Arts	Fine Arts

Add from Parameter ▾
Add from Field ▾
Paste from Clipboard
Clear All

OK Cancel

Parameter for Multiple Data Sources

- Create calculated field for each data source that will filter for parameter selection
 - Different from regular calculated field needed for parameter
 - Test to see if field equals the parameter selection - true/false output

Enrollment	<p>Selected College <input type="text"/> ENROLLED_STUDENTS_CPE_IPEDS (STUDENT.ENROLLED_S... X</p> <p>[Major 1 College Primary] = [College Selector]</p> <p>The calculation is valid. <input type="button" value="Apply"/> <input type="button" value="OK"/></p>
Retention	<p>Selected College <input type="text"/> RETENTION_INSTITUTIONAL (STUDENT.RETENTION_INSTI... X</p> <p>[Primary College 1St Fall] = [College Selector]</p> <p>The calculation is valid. <input type="button" value="Apply"/> <input type="button" value="OK"/></p>
Degrees	<p>Selected College <input type="text"/> DEGREES_AWARDED_CPE (STUDENT.DEGREES_AWARDED... X</p> <p>[Degree Major College Name] = [College Selector]</p> <p>The calculation is valid. <input type="button" value="Apply"/> <input type="button" value="OK"/></p>

Parameter for Multiple Data Sources

- Filter for calculated field equal to TRUE for each data source
 - Will only show data if field contains an option that is identical to the parameter selection

Filter [Selected College]

General Condition Top

Select from list
 Custom value list
 Use all

Enter search text

Null
 False
 True

All None Exclude

Summary

Field: [Selected College]
 Selection: Selected 1 of 3 values
 Wildcard: All
 Condition: None
 Limit: None

Reset OK Cancel Apply

Parameter for Multiple Data Sources

- Place all worksheets on a dashboard with parameter control
 - Or show parameter control on each worksheet page
- All worksheets should display info for the parameter selection

College Selector
Ag, Food and Environment

Enrolled Students
2,923

Retention Rates

	Cohort Term								
	Fall 2008	Fall 2009	Fall 2010	Fall 2011	Fall 2012	Fall 2013	Fall 2014	Fall 2015	Fall 2016
2nd Fall Retention Rate	82.2%	79.6%	81.5%	83.4%	84.2%	84.3%	85.2%	82.0%	
6 Year Graduation Rate	63.9%	62.3%	63.5%						

Degrees
740

College Selector
Education

Enrolled Students
2,672

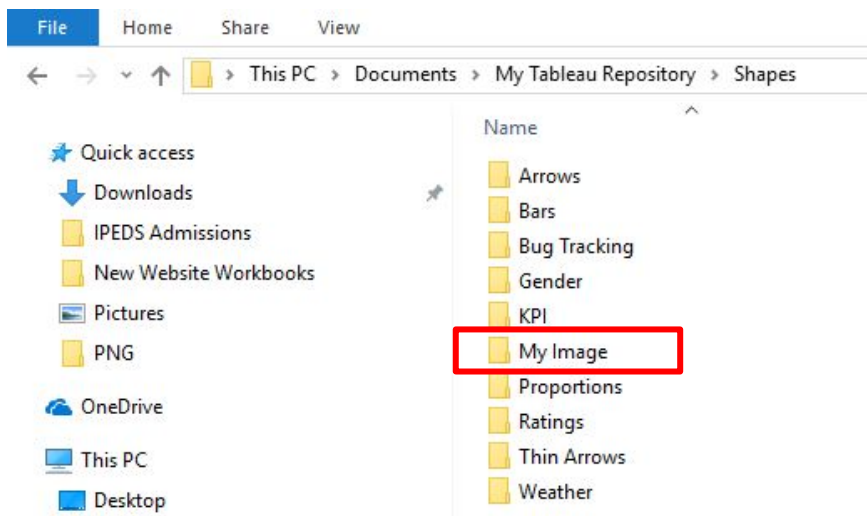
Retention Rates

	Cohort Term								
	Fall 2008	Fall 2009	Fall 2010	Fall 2011	Fall 2012	Fall 2013	Fall 2014	Fall 2015	Fall 2016
2nd Fall Retention Rate	78.3%	80.4%	76.0%	84.3%	83.3%	82.7%	81.7%	84.1%	
6 Year Graduation Rate	57.9%	60.4%	62.4%						

Degrees
751

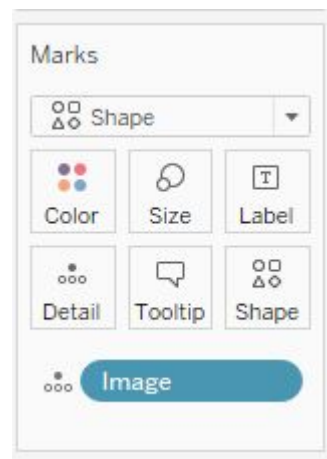
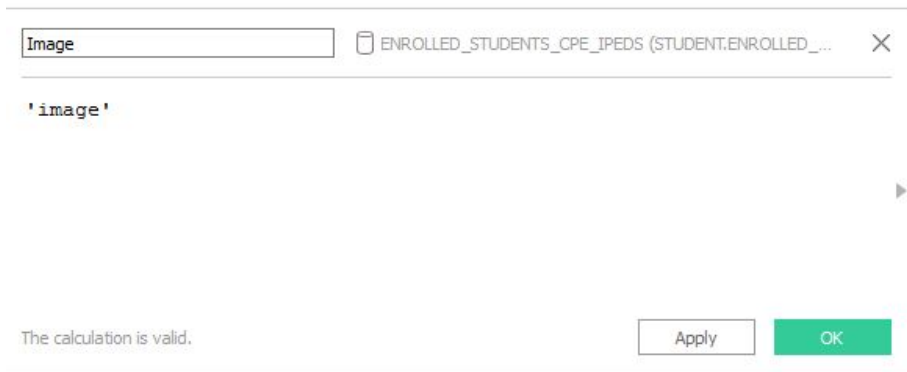
Importing Images

- Customize workbooks with special icons relevant to content or to indicate workbook features (think help icon on *Enrollment* workbook)
- Create folder called **My Images** under *Documents > My Tableau Repository > Shapes*



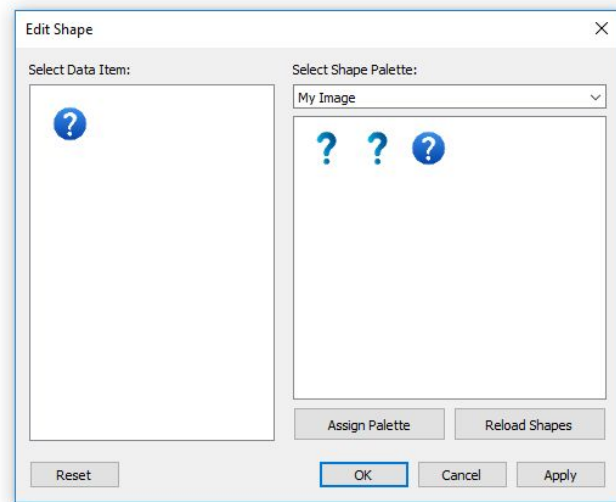
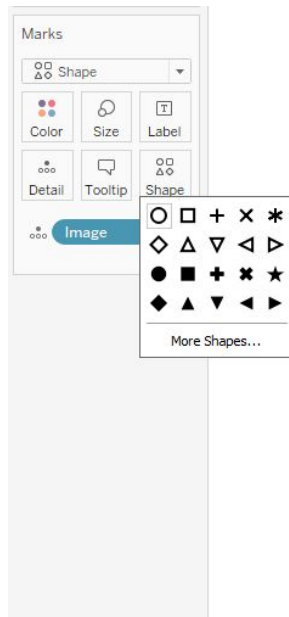
Importing Images

- Find desired image and save under **My Images** folder
- Create a calculated field for the image
- Place calculated field as a detail on Marks Shelf in a new blank worksheet
- Change Marks to **Shape**



Importing Images

- Click on **Shape** icon then **More Shapes...**
- Navigate to **My Images** using the Shape Palette drop down
- Select the image you want to use and press **OK**

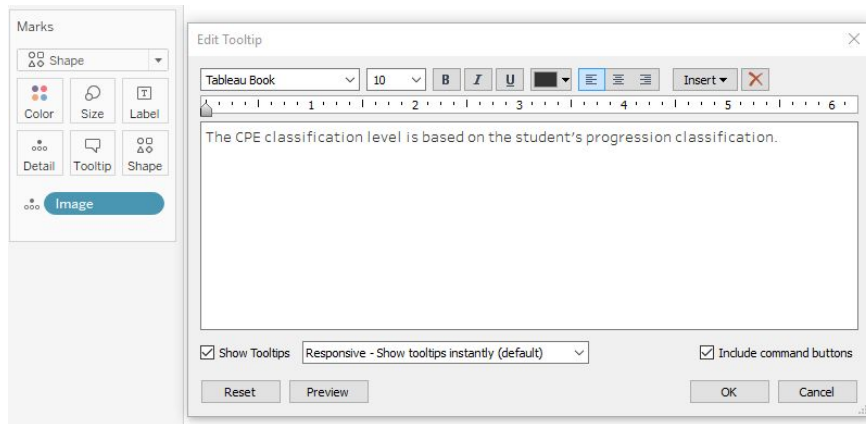
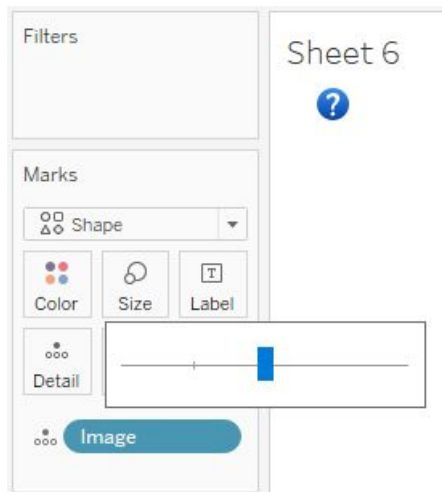


Sheet 6



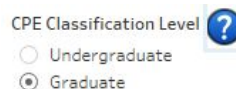
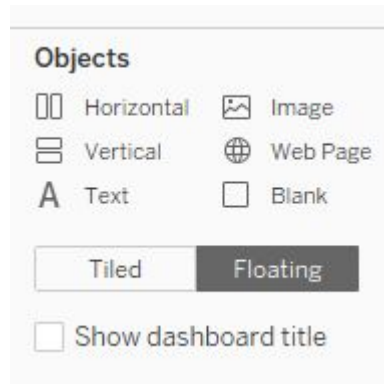
Importing Images

- Change the size of the image by clicking on the **Size** icon and using the slider
- If you want to display text when users hover over the image, click on the **Tooltip** icon to edit the text



Importing Images

- Add the image to a dashboard by selecting **Floating** then dragging the worksheet into the view
- Hide the title of the worksheet and make the image fit to the **Entire View**
- Place the image accordingly to indicate to users they can go here for information



The CPE classification level is based on the student's progression classification.

7,160