Tableau Reader : Tips and Tricks

NOTE: To view Tableau files you will need to download and install the Tableau software, which can be found here: https://www.tableau.com/products/reader

1. Navigation

To go directly to a specific page you can either use the tabs across the bottom of the screen or click through the interactive menu on the homepage. Once within the dashboard you can also navigate using the common icons shown below:

🏠   Takes you back to the homepage

ⓘ   Takes you to an information page specific to that dashboard

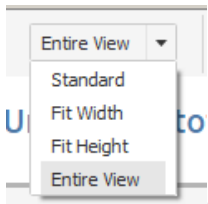↺   Returns you to the previous page or to the beginning of the current section

✛   Indicates further data is available on a particular item

2. Screen view

Towards the middle of the top toolbar you will find a dropdown box which gives different options for the chart appearance:

Using 'Entire View' will squash or stretch all the data within your selection to fit the page, while switching to 'Fit Width' will display data in a standard size, with a scroll bar to the side if necessary.

If you want to use a dashboard as part of a presentation you can click the 🖳 icon, found on the top toolbar. This sets the view to presentation mode while keeping the navigation tabs at the bottom of the screen.

3. Chart colours

Wherever you see a colour legend like the one below, you have the option to change the colours that appear in the charts. This is useful in cases where Tableau has assigned random colours, or if you are printing in black and white and want to make your own departmental colours more distinct.
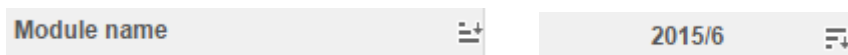

To change the colours highlight the legend then click the black triangle (top right) and choose 'Edit Colours'. Tableau gives a choice of different colour palettes, one of which is colour blind specific.

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:
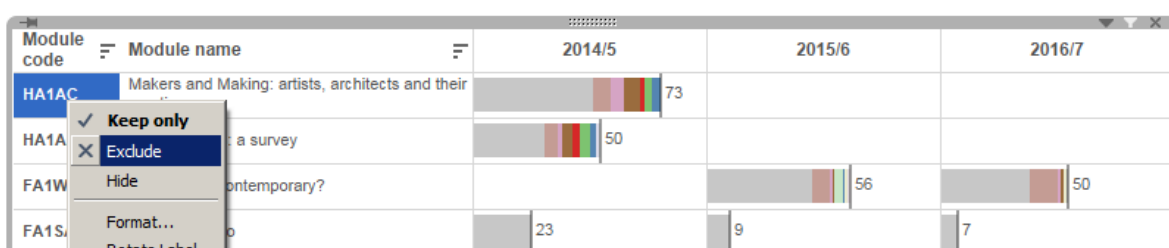

Where the data forms part of a numerical calculation, hiding removes it from the view while excluding takes the data out of the calculation entirely.

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 Excel':
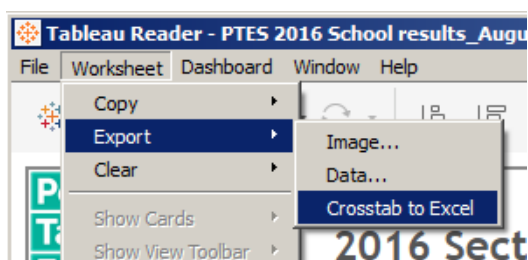
7. Creating pdfs

To create a pdf version of any chart, click FILE and 'Print to PDF', then simply choose the paper size and orientation. It is often useful to use the screen view or hide/exclude functions described above in order to create a pdf that fits nicely on the page.

> **If you have any questions or need further assistance in using the dashboards, please contact**
> **planningandstrategy@reading.ac.uk**