

Vandalia Health Network - Tableau Tips

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1. Tableau Overview

Tableau is a data visualization software that was designed to help people and organizations view and manage data and share insights. Tableau is embedded into Cerner/Oracle Analytics, and many of the dashboards and reports were created with it. Knowing the basics of using Tableau dashboards will make analyzing the data much easier.

2. Commonly Used Features

a. The Toolbar

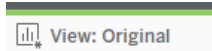
The Toolbar is at the top of each dashboard and has several frequently used actions and tools. Actions will be greyed out if they are not currently applicable.



In order, from left to right:

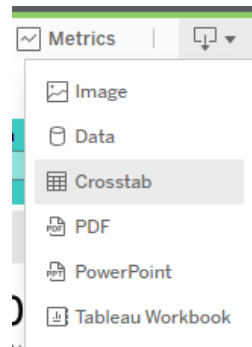
Undo	Reverses the last change
Redo	Repeats the last change that was reversed with Undo
Reset View	Reverses all changes
Refresh Data	Loads the most current data
Pause Data Queries	Prevents the dashboard from refreshing the display

b. Custom Views



The Custom Views button allows each user to create Custom Views, which are a saved set of filters. Custom Views can be saved, set as the user's default view, switched between quickly, and can be shared with other Tableau users.

c. Download



The Download option gives several options to download the dashboard visualization or the data behind the visualization.

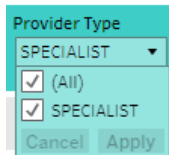
Image	A screenshot of the dashboard
Data	The data that is displayed in the dashboard
Crosstab	The data in a tabular format (Excel or CSV format)
PDF	An Adobe PDF document suitable for printing
Powerpoint	A Microsoft Powerpoint slide deck
Tableau Workbook	A workbook in Tableau Workbook format

3. Using Filters

Most dashboards include filters. In most cases, primary filters will be across the top of the dashboard and will be visually highlighted.

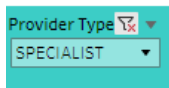
a. Selecting values

Clicking the dropdown list will allow selecting and unselecting values.



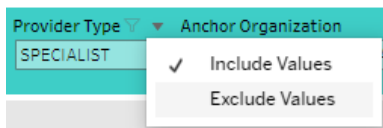
b. Clearing a filter

Clicking the red X next to the filter name will clear the filter and show all values.



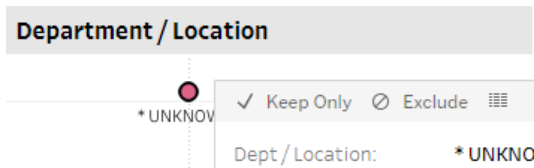
c. Reverse filtering

Clicking the arrow next to the filter name will allow the filter to be switched between including or excluding values.



d. Filtering from a chart

Filtering can also be applied by clicking on charts and graphs. Click on a data point, then click "Keep Only" or "Exclude" to apply it to the filter.





To select multiple data points, hold down the mouse button and drag the mouse over multiple data points.

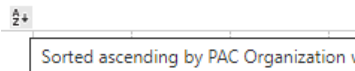
4. Sorting



Tableau dashboards typically include several options for sorting the data and the chart contents. When sorting can be changed, hovering the mouse over an element will show a small sorting icon that can be clicked to change the sort order.

a. General Sorting

In general, clicking the sort icon ( or ) will cycle through the three sorting options:



Ascending Order	Sorted ascending (A to Z if text, or 0-9 if numeric)
Descending Order	Sorted descending (Z to A if text, or 9-0 if numeric)
Data Source Order	The unaltered order of the source data (varies)



After sorting has been changed from the default, hovering the mouse pointer over the sort icon ( or ) will cause a popup message showing the current sort order.



b. Column Sorting

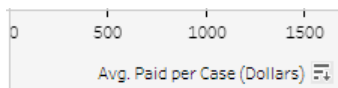


In tabulated lists, most columns can be sorted. The values in the columns are often names, quantities, and dates. In this example, clicking the sort icon ( or ) next to Last Name will change the sorting from ascending Last Name to descending Last Name.

c. Chart Sorting



In some charts, data in different axes can be sorted. In this example, the chart's Y axis (PAC Organization Names along the left side) defaults to being sorted by descending number of visits (highest to lowest). Clicking the sort icon ( or ) will change the Y axis to sort by ascending PAC Organization Name instead.



Clicking the sort icon along the bottom X axis will change the sort order to descending dollars (highest to lowest). Clicking it again will change the sort order to ascending dollars (lowest to highest).

5. Adjusting Browser Display Size

Some dashboards are designed to automatically fit the browser window, and others are designed to fit in a designated screen size. Depending on the design and the browser settings, additional or unwanted scroll bars might appear, or the details of the dashboard might not be easily readable. There are different ways to adjust the display to suit the user's preferences.

a. Expand Tableau within Analytics



Clicking the blue “Expand” button in the upper right area of Analytics will hide many parts of Analytics and will create more viewable area for the dashboard. Then click “Collapse” to shrink the area back to the original size.

b. Adjust Browser Zoom Setting



The Zoom level of the web browser can be changed at any time by holding down the CTRL key and then pressing the + or – key.

This setting can also be found by clicking on the 3 dots in the upper right corner of the web browser.

Google Chrome:



Microsoft Edge:



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