UC Tableau User Group Meeting Documentation

August 11, 2017

Tips & Tricks

Irvin Palacios – "Spider-Webbing" Tableau Workbooks

Purpose:

- The purpose of this technique is to create a "network" of dashboards.
- You will need a central "high level" dashboard that can "crawl" to "detail dashboards"
 - This is the happy medium of having a dashboard with so many detail, but without cluttering your main dashboard.

Instructions:

- Once you have created a visual you must imbed the URL(s) into your worksheet.
- If you have **ONE** URL do the following (If you have **TWO or MORE** URLs skip down to the next step for instructions on 2 or more URLs)
 - Create a Calculated Field
 - Title it "URL" or "URLs"
 - With one URL take the **Calculated Field** you created, and drop your URL into the calculated field as a **string.** (Put quotation marks, "", around your URL)
 - o Make second Calculated Field
 - Title it "URL Dashboard Name"
 - Create a Case function that will give a name to your URL that is more elegant.

CASE [URL] WHEN 'https://tableau.ucsd.edu/#/views/Req-PO' THEN 'Req-to-PO Process Time Health' END	URL Dashboard Name	€ 6. tbl_Req_Po_Org (Req_PO_DB)	×
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o Take both of your newly created Calculated Fields and drag them into the Details Marks

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- If you have TWO or MORE URLs
 - Create a Calculated Field
 - Title it "URL" or "URLs"
 - With two or more URL take the Calculated Field you created, create a Case function on the URLs, and put your URLs into the calculated field as a string. (Put quotation marks, "", around your URL)

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- o Make second Calculated Field
 - Title it "URL Dashboard Name"
 - Create a Case function that will give a name to your URL that is more elegant.
- o Take both of your newly created Calculated Fields and drag them into the Details Marks
- Once you have your calculated fields in the detail marks its time you add in the Filter Actions
 - o Create a Dashboard and put your sheets in it.
 - Head over to Dashboard -> Actions -> Add Action -> URL
 - Find your Source sheet, and I run my action on "Menu"
 - In the "Name:" section at the top, click the arrow on the right, and select "URL Dashboard Names", this draws from your calculated field that your left in the Details Mark.
 - Next on the "URL" portion, click the arrow on the right again, and choose "URLs"

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• Now you have created a network between different dashboards. Add as many as you'd like.