UC Tableau User Group Meeting Documentation

August 11, 2017
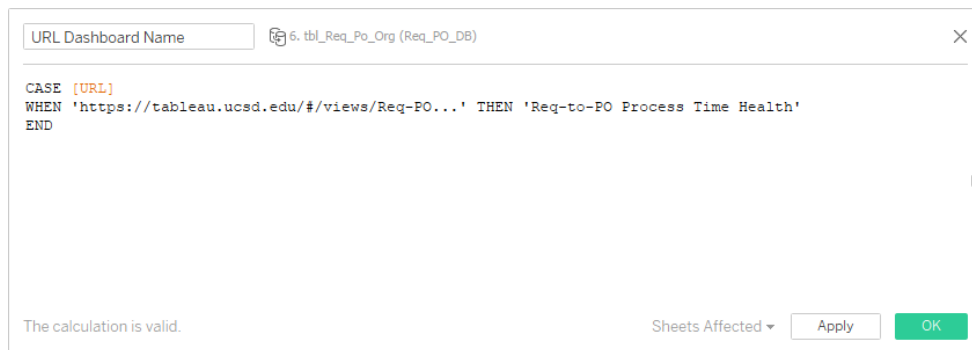
Tips & Tricks

Irvin Palacios – "Spider-Webbing" Tableau Workbooks
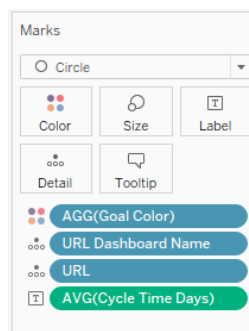
Purpose:

- 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)
  - 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.
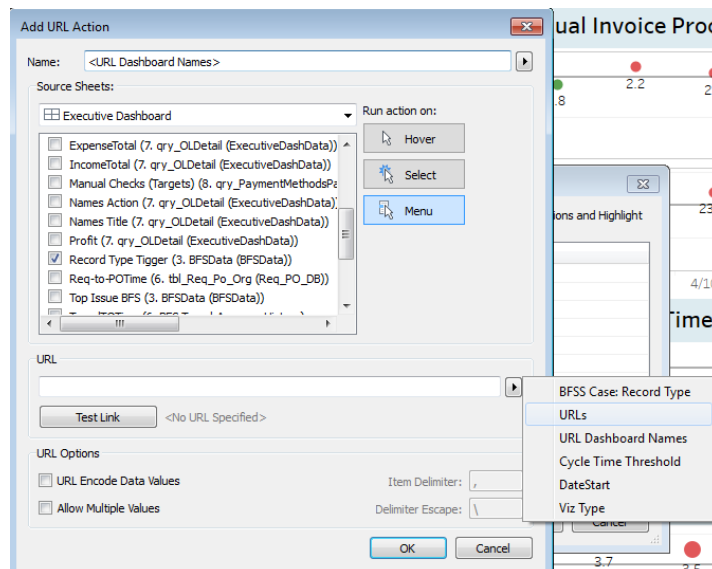

  - Take both of your newly created **Calculated Fields** and drag them into the **Details Marks**

- 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)

  - 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.
  - 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**
  - 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"

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