

UC Tableau User Group Meeting DocumentationMay 5th 2017Tips & Tricks**Irvin Palacios – Tableau Show/Hide Interactive parameters & filters**

Unique Items (First items to set-up)

1. Add a dummy **database** for the **toggle**
2. Create a dummy **parameter** to center the icons

Instructions:

1. Create a **dummy database** which is going to be used to **trigger** the actions, as follows.
 - a. Open a blank excel sheet and type the following:
 - i. Column Name: "Toggle"
 1. Two Rows of "data":
 - a. "hide"
 - b. "show"
2. Create a **dummy parameter**
 - a. Name your parameter
 - b. Data type: Float
 - c. Current Value: 0
 - d. Click 'OK'
3. Creating the **Blank Sheet**
 - a. Create a **copy** of the **Toggle** Dimension, right click on **Toggle** in the **Data Pane**, and click **Duplicate** – I always just keep my at default naming **Toggle (copy)**
 - b. In the **Blank Sheet** add the "**Toggle**" pill to **rows**.
 - c. Add the **Toggle (copy)** to the filter shelf, and filter for only **show**
 - d. Format to Hide/change colors to hide all text. **This step can be left till the end, since adjusting this sheet will involve you having to adjust the within the sheet.**
4. Creating the **Closing Trigger**
 - a. Add **Toggle** pill to the **Details** in the Marks
 - b. Add **Toggle** pill to Filters, and only show **hide**.
 - c. Change marks to **shapes**, you can choose your desired shape, as well as color at this point.
 - i. You will have to **right click** on your **shape**, and **'Format'** in order to get rid of the border lines, and zero lines.
 - d. Add the **two dummy parameter** to columns, and create a **dual axis, right click on pill, and click on 'dual axis'** (this is to center shape), **hide** the headers, by right clicking and clicking on **'Show Header'**.
5. Creating the **Opening Trigger**
 - a. Add **Toggle** pill to the **Details** in the Marks
 - b. Add **Toggle** pill to Filters, and only show **open**.

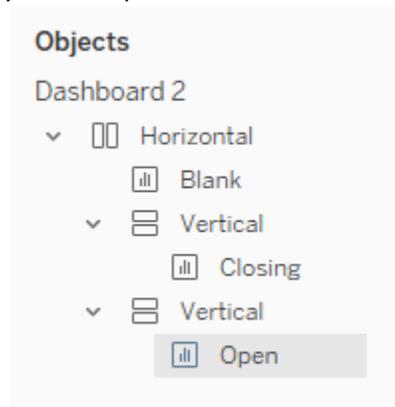
- c. Change marks to **shapes** you can choose your desired shape, as well as color at this point.
 - i. You will have to **right click** on your **shape**, and **'Format'** in order to get rid of the border lines, and zero lines.
- d. Add the **two dummy parameter** to columns, and create a **dual axis, right click on pill, and click on 'dual axis'** (this is to center shape), **hide** the headers, by right clicking and clicking on **'Show Header'**.

Dashboard Setup

1. A **floating** horizontal container that extends beyond the boundaries of the dashboard
2. A **vertical** sub-container for the menu area
3. A **vertical** sub-container for the visualization
4. A blank worksheet that can show or hide with action filters. Blank Sheet will not be showing.

6. Building The Dashboard

- a. Create a Dashboard, insert a **floating horizontal** container, and keep it inside your dashboard range until you have arranged the basics.
- b. Add the **blank sheet** inside the floating horizontal box
- c. Next add a **vertical** container inside the horizontal box, just to the right of the blank sheet.
 - i. Add your **closing trigger** into the newly created sub-vertical container
- d. Next, add an additional **vertical** container to the right of the container that holds the closing trigger, but not inside the container.
 - i. Add your **opening** trigger inside the sub-vertical container you just created in your dashboard
- e. Your Layout set-up should look like this:

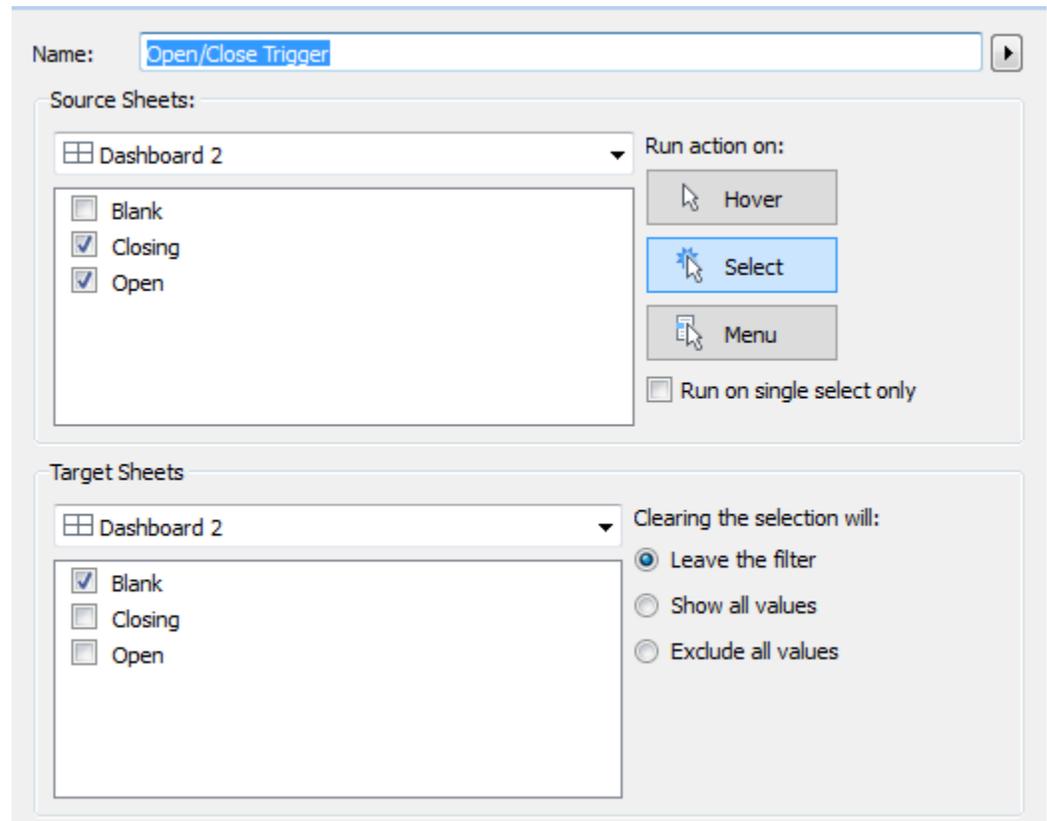


- f. Remember to have "Fixed Width" **unchecked** on the **blank sheet**. Change width from within the sheet. Go to the sheet, and adjust visual manually if needed.

7. Adding the Action

- a. Dashboard -> Actions -> Add Actions -> Filter
- b. Source Sheets are: **Closing Trigger** and **Open Trigger**
- c. Run Action On: **Select**

- d. Target Sheets: **Blank Sheet**
- e. Clearing the selection will: **Leave the filter**
- f. **Filter Action** should look like this:



Name:

Source Sheets:

Dashboard 2

Blank

Closing

Open

Run action on:

Run on single select only

Target Sheets:

Dashboard 2

Blank

Closing

Open

Clearing the selection will:

Leave the filter

Show all values

Exclude all values

8. Adjusting Dashboard

- a. This is the 'hardest' part, because it will vary depending on how big your dashboard, and what range you want to hide.
- b. Play around with this, until desired look is achieved.
- c. ***Key: Blank Sheet AND Closing Trigger should both be relatively the same size. See example below.**
- d. ***Once you have your sheets sized correctly, before positioning your floating horizontal container, make sure to have to blank sheet hidden, only then should you move your container into the negative x-axis.**
- e. Mine for Demo is:
 - i. Horizontal
 - 1. Size - Width: 1038 / Height: 780
 - 2. Position – x: -324 / y: 12
 - ii. Blank Sheet
 - 1. Size - Width: 320 / Height: 772
 - iii. Closing Trigger
 - 1. Size – Width: 305
 - iv. Opening Trigger
 - 1. Size – Width: 389