## **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				
▶	CASE [URL] WHEN 'https://tableau.ucsd END	.edu/#/views/Req-PO' THEN 'Req-to-PO Process Time Health'			
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o Take both of your newly created Calculated Fields and drag them into the Details Marks

Marks								
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AGG(Goal Color)								
號 URL Dashboard Name								
URL								
T AVG(Cycle Time Days)								

- 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)

URLs & 3. BFSData (BFSData)		×	
CASE [BFSS Case: Record Type] WHEN "Disbursements" THEN "https://tableau.ucsd.edu/#/views/APBacklogDashbaords WHEN "Mail Services" THEN "https://tableau.ucsd.edu/#/views/MailServicesDash" END	/BFSupportBacklog?:iid=1"		
		Þ	
The calculation is valid.	Sheets Affected 👻 🛛 Apply	OK	

- 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.