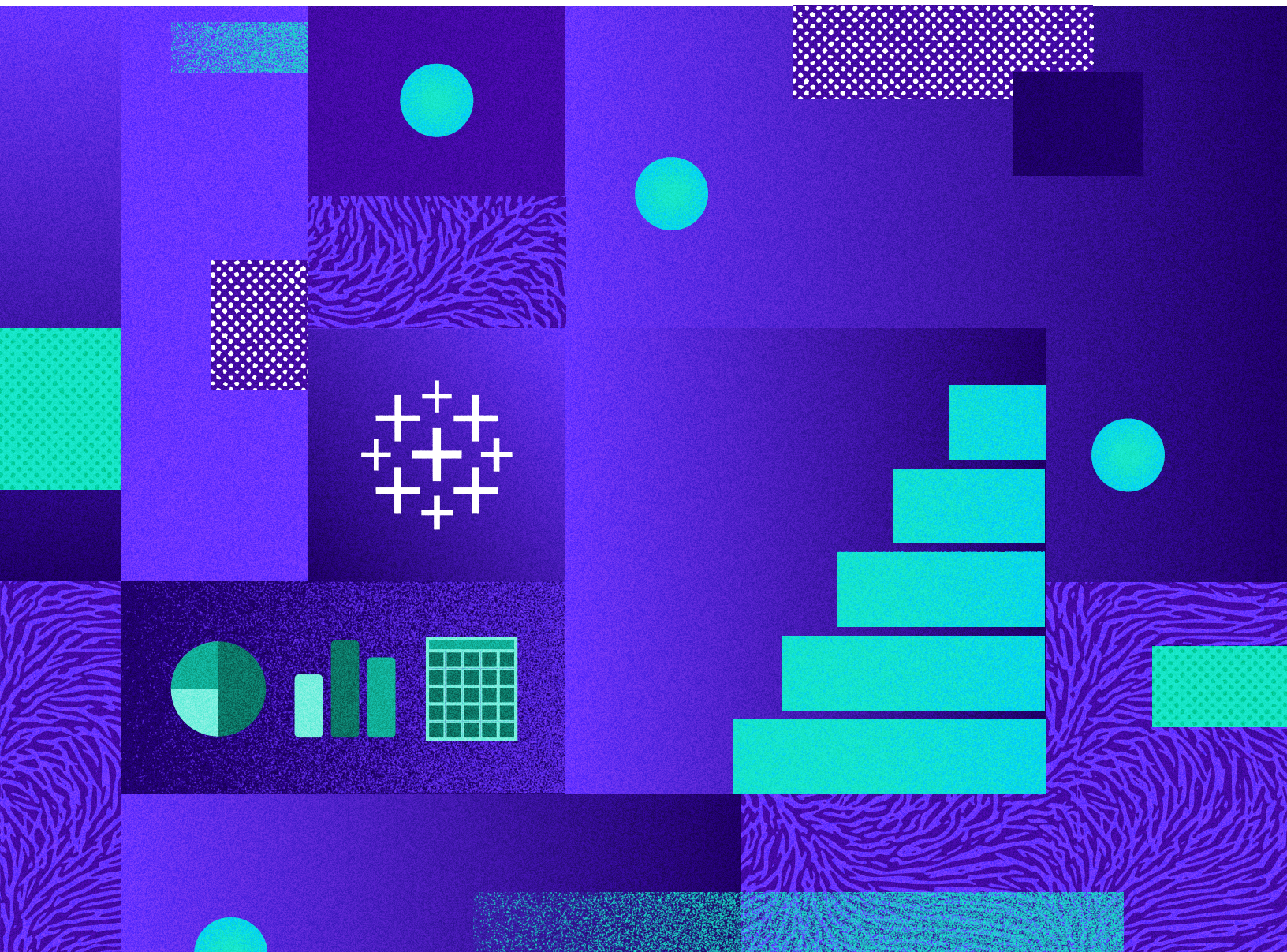# Getting Started in Tableau Desktop

Whether you're new to Tableau or need to brush up on basics, this guide shares foundational best practices that will ensure your Tableau dashboards look great, perform well and are easy to build.

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Bar Chart

- One Dimension on Row
- One Measure on Column
- Add another Dimension to Color or Detail for stacked bars
- Use Axis Swap to go from horizontal to vertical

Scatter Plot

- Measure to Columns (independent variable, X-axis)
- Measure to Rows (dependent variable, Y-axis)
- Measure on Size for 3rd factor
- *TIP: If using Shape Chart, open the Shape card for more mark options*

Table

- Dimensions on Rows and/or Columns to structure your table
- Measure(s) to the 'Abc' area in your table/view
- Put a measure onto Color and change the Mark type to Square
- *TIP: For a multi-metric table, put Measure Values onto Color then have it use Separate Color Legends*

Maps

- Geographic field to Detail
- Mark type defaults to circle, but filled map is available for more in-depth color encoding
- Put a 2nd measure to size or color for added effect
- *TIP: Right-click a field from the Data pane to define a geographic role*

Sorting

- Logical ways to sort by values and fields
- Sort the answer to the question to the top
- Ranked sorting (asc, desc) speeds up analysis

Line Chart

- One Measure to Rows
- Date Field as Value (ex. May 2015) to Columns
- Green dates generate timelines

Pie Chart

- Mark Type to Pie
- Dimension to Color
- Measure to Angle
- Limit to 2 - 6 segments

Dashboards

- Display related charts to answer questions
- Simple titles, intentional color, use whitespace
- Filters and dashboard actions promote interactivity
- Make the experience meaningful to the end user

Multiple Metric Charts

- Measure Names and Measure Values are used to support multiple metrics on a view
- Shared charts show separate measures on one axis; drag 2nd measure onto the view's axis
- Dual Axis charts provide separate chart options per metric and greater visual flexibility

Filters

- Using the Filters shelf, limit the view to only the necessary data you or end users will need for that sheet
- Filter at the data source level to limit data entering the workbook
- Use cascading filters to limit data on initial load of the dashboard to increase overall performance

Dates

- Blue date parts create headers and buckets for data
- Green date values create timelines, breakdown data and can be formatted similar to an axis
- *TIP: Right-click drag the date field to select the timeline aggregation*

Color

- Blue fields on color for groups
- Green fields on color for gradients
- Use diverging palettes when there is a logical threshold *(ex. negative to positive scale)*

Detail

- Blue discrete fields on Detail add more detail/granularity to a view
- Green continuous fields on detail make data available to use with reference lines

Currency

- Right-click a field from the Data pane to set default currency formatting
- Right-click the field in the view for sheet specific formatting only
- Use Units (K, M, B) on a sheet-by-sheet basis if applicable

Unicode Characters

- Unicode characters can be pasted in as text
- Adds shapes to labels, tooltips, etc.
- Can be included in calculations for conditional formatting

Table Calculations

- Table calculations transform data (Δ)
- The data in a table calculation must be in the view
- Since table calculations are confined to a view, that makes them very performant for a dashboard as no data queries are performed

Calculated Fields

- Create new fields or modify existing fields
- Use the function helper to the right of the calculation box
- Aggregations must match on both sides of the operator (record-level <> aggregated)

Fixed Level of Detail

Syntax: *{FIXED [Dimension] , [Dimension] : AGG([Measure])}*

- Read aloud as: Locked to the [Dimension}, return the AGG([Measure]) *a dimension is optional*
- FIXED LODs ignore the view and return what it's told as long as the locked dimension is present

Parameters

- Provide interactivity and analysis flexibly to views
- *Step 1:* Create | *Step 2:* Show | *Step 3:* Use
- Use in calculated fields to apply parameters across filters, worksheets, workbooks and data sources

Best Practice Tips

- Organize complex data panes using folders
- Create hierarchies for nested fields
- Use groups to add segmentations to your data
- Sets can generate dynamic labeling
- Use pre-attentive attributes to increase speed to insight
- Design with your audience in mind at all times

interworks