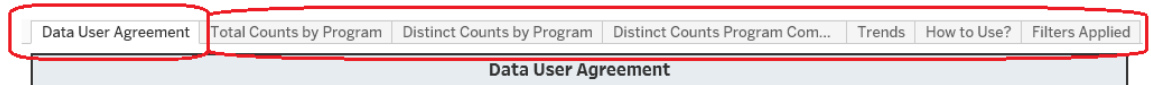


# Tableau Dashboard Quick User Guide

This Quick User Guide provides brief information on how to navigate and interact with Tableau dashboards and charts.

## BASIC NAVIGATION

Some dashboards have tabs across the top of the screen, which correspond to different views. Select the tab to move to a different view



Some dashboards will have graphic navigational tools, such as these arrow and Home icons.




Select a record and/or click the arrow icon to advance to the new page/view.




Click the home icon to return to the designated “home” view.

## INFORMATIONAL FEATURES

There are several common features generally available on each dashboard to provide additional information. For these, move the cursor on top of the object (hover on it) to display the tooltip text.

 The Dashboard hover help describes the dashboard purpose & objective, the primary measure(s), the data sourcing, and related policies or logic. It is always in the top right corner of the dashboard (of varying color)

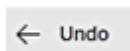
 The blue Info icon is used to provide more information about specific element(s) within the dashboard.

 A specific chart may have supporting charts for more detailed information. This “Viz in Tooltip” icon is used when the supporting information may/should be displayed without associated chart filters engaged.

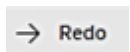
## TOOLBAR



The Tableau Tool bar is located at the bottom of each tab (or may be disabled by design). Important features:



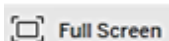
Select Undo to reverse an action. For example, applying a filter or excluding a value.



Select Redo to be re-apply an action that has been Undone.



Select Revert to go back to the default/original view you see when you first entered the tab.

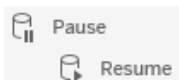
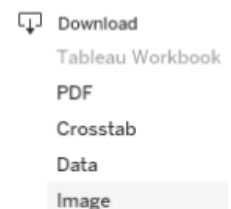


Select this to increase screen view. Click the ‘Exit Full Screen’ icon  to minimize the screen view.



Select to Download the visible content in PDF or Image format. Follow the on-screen instructions for the selected action.

**Note:** Data download is normally disabled, due to the sensitive nature of the underlying detailed dataset.



Interacting with a dashboard you may find it takes some time to update any changes made with a filter. Use Pause to hold those changes as you update filter(s). Once all have been selected, click “Resume” to update for all changes at once.

## FILTERS

Dashboards often contain user-selectable filters, which allow a user to adjust the content & results to fit their specific needs. These filters allow a user to drill down into specific data or limit results based on selected attributes and values.

### DROPDOWN Filters

Program Area

(All) [filter triangle]

- (All)
- Child Care
- Food Share
- Medical Assistance
- Other
- W-2

Cancel [Apply]

Click on the filter triangle to see available options.

If multi-value selection is enabled, select one or more values' check-boxes and click on Apply to filter the chart(s) on the dashboard.

Note: Apply and Cancel buttons in the drop down filter are activated only when the values are selected from the drop down list.

Filters have search boxes at the top or bottom of the list of options. Type what you are looking for in the box and then select the value from the list and click on Apply. To clear the search box click on the cross to the right side of the box.



Program Area

(All) [filter triangle]

child [clear icon]

- Child Care

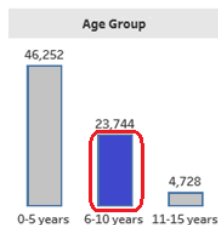
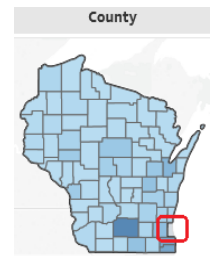
Cancel [Apply]

To easily clear filters, click the  icon, which will be in the filter's corner. 

## CHART FILTERS

Charts on the dashboard are generally interactive (unless stated otherwise) and when selected they apply filtering to the other charts on the same dashboard/tab.

A simple example is a performance measure map of the state. Clicking on one or more counties within the map will filter other charts within the dashboard for the selected values.

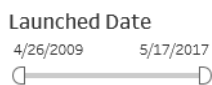


The same is true for a bar, line or data chart.

Clicking on a data point, chart value or even a date will filter the other charts of the dashboard.

To multi-select values on any chart hold CTRL button and left click to select multiple values.

## DATE FILTERING



A date slider is provided on many dashboards to adjust the time period of the view.

The time period can be adjusted quickly with the help of the slider, though not always as precisely as desired.

To be more precise a calendar can be activated by clicking on the left/right date fields as shown. This will display a full calendar allowing selection of any exact date.

**Note:** Default date display is m/dd/yyyy and is independent of the run-time display timeframe on the dashboard. **Example:** Default timeframe display on the dashboard charts is set to Quarterly aggregation.

If the user sets start date to 2/16/2018 data will be displayed on the dashboard for Q1.

But, it will only include 2/16/18 and later. The first 15 days of February, and all of January, will **not** be represented within the quarterly aggregation. In order to capture **all** data within Q1, the exact start date must be set as January 1, and end date set to March 31.

