tableau

Free Training Transcript: Getting Started with Dashboards and Stories

Welcome to this getting started video on Dashboards and Stories. You can download the Exercise workbook to follow along in your own copy of Tableau.

Dashboards and Stories

Dashboards are a way to present one or more views, often with filters, legends, and interactivity tying the views together. Dashboards can include sheets, text, images, and webpages.

Stories in Tableau are narrated walkthroughs of one or more sheets or dashboards, for example leading the audience through a discovery you made as you were analyzing the data. Each view or dashboard in a story is called a story point.

Working with Views in Dashboards and Stories

Any view that is brought into a dashboard or story is simply a window to the underlying worksheet. For the most part, changes made on one sheet – whether it's a view or a dashboard, will carry through to the other places that content is in use. Stories have slightly different behavior.

To illustrate how changes ripple through the workbook, we'll execute a series of alterations on this simple scatterplot and see where those changes show.

Once content has been added to a story, it only tracks changes as long as it has been unmodified on the story. Any changes made to content in a story do not reach back and update the underlying content. Dashboards do reach back and update the underlying content.

The details of what we're about to do don't matter so much as the general understanding of when changes will impact other sheets.

First, we'll bring the scatterplot onto the dashboard and story. Go back to the scatterplot and add Category to color. Verify the changes reflect on the dashboard and story. If we're ever on a dashboard or story and we easily want to get back to the specific sheet, it's highlighted on the left and there's a go to sheet icon.

On the scatterplot, uncheck Technology. Verify that the dashboard and story change.

On the dashboard, we'll uncheck Furniture. This carries through, and the Story and the Scatterplot are only orange. On the story, we'll retick Technology. Now, because this is a Story, we should see that the dashboard and the scatterplot did not change. Modifying the story's filter doesn't make changes anywhere else, unlike the dashboard. On the scatterplot, recheck Furniture. The dashboard should match, but the story won't. Once we've modified the story's filter, the view no longer tracks filter changes that were made elsewhere.

On the scatterplot, add Market to Shape. Verify that the dashboard and the story have those shapes. We hadn't modified the shape on the story, so it continues to track those changes from the scatterplot.

As we can see, there's a great deal of interplay between the sheets. Once again, for the most part, changes made on one piece of content – whether it's a view or a dashboard, will carry through to the other places that content is in use, but content that has been added to a story only tracks changes so long as it is unmodified on the story.

Working with Sheets

Duplicating sheets that are used in dashboards and stories can be useful if a view is used in multiple places and we want to maintain control of any changes. To duplicate a sheet, right click on the sheet tab, and select duplicate. We could now use a separate copy on the story and the dashboard.

If the finished story or dashboard are the main purpose of the workbook, it can be a best practice to hide all the other content so it don't distract from the main goal. Right click on the sheet tab and select "Hide Sheet". To hide a sheet, it must be in use in either a dashboard or a story, or the option will not be available. This is because if the sheet isn't used somewhere, there would be no way to get back to it once it was hidden. If modifications need to be made on a hidden sheet, go to the dashboard or story where that sheet is in use, and, from the list of available views, either . Click the "go to sheet" icon. This will temporarily bring up the sheet, and clicking off it will hide it again, or right click and unhide the sheet right here.

Conclusion

Thank you for watching this getting started training video. To learn how to build a dashboard or story, we invite you to continue with the videos in this section.