

Show worksheet title tableau

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Your comment on this question: Your comment on this answer: Related Questions In Tableau Publicato: 17 Mar 2017 Data dell'ultima modifica: 03 Jan 2019 How to create a worksheet or dashboard title that always shows today's date. Tableau Desktop Select Analysis > Create Calculated FieldName the field Today, enter the following calculation, then click OK: TODAY()Drag Today onto Detail, then right-click YEAR(Today) and select More > Custom > Detail. In the Custom dialog box, select Month/Day/Year.If a title is not already displayed, select Worksheet > Show Title. Right-click the title on the view and select Edit Title.In the Edit Title dialog box, remove the current text. Click Insert and choose MDY(Today), then click OK. The title now shows the current month, day and year. The Title of a dashboard cannot reference the field, so use a worksheet in place of the dashboard's title. Create a new sheet, and follow the steps from the Worksheets section, and name the worksheet Title. If your dashboard has a title, remove it. Drag the Title worksheet to the top of the dashboard. Right-click the Title worksheet and select Fit > Fit Width. Drag up the bottom edge of the view so only the title shows. To see these steps in action, view the video below. Note: Video has no sound. Discuss this article... Feedback Forum You can show titles, captions, and tooltips on any sheet. After you add a title or caption you can edit and format the text as well as modify the shading and border. If a title or caption is not showing, from the top menu, go to the menu for the current sheet type (Worksheet, Dashboard, or Story) and select Show Title or Show Caption. A legend card appears in the worksheet when you encode marks by dropping them on the Color or Size cards. You can format the legend font, shading, border, and alignment. You can also edit the titles that appear on each legend. Edit worksheet titles, legend titles, or captions (Tableau Desktop only) Do one of the following:If you are editing a worksheet title on Tableau Server or Tableau Online web editing, double click the item you want to change. Worksheet captions and legend titles cannot be edited in web editing.Right-click (control-click on Mac) the item you want to change and select Edit , for example, Edit Title.On a worksheet, hover on the title, click the drop-down arrow on the right-hand side and select Edit Title or Edit Caption from the context menu.In the Edit dialog box, modify the text and format the font, size, style, color, and alignment. Use the Insert menu to add dynamic text such as sheet properties and field values. Click OK. For more details Tableau Training Format borders and shading for a title, legend, or caption (Tableau Desktop only) Right-click (control-click on Mac) the title, caption, or legend and select Format —for example, Format Title.In the Format pane, use the drop-down lists to change the default shading and border. Edit dashboard titles To edit a dashboard title: In a dashboard, double-click the title.In the Edit Title dialog box that appears, format the title as you like. You can enter a new title for the dashboard or a description, as well as change the font type, size, emphasis, color, and alignment. You can also type in a website URL and Tableau will automatically create a hyperlink. The dashboard title updates with the changes. Format tooltips Tooltips are details that appear when you rest the pointer over one or more marks in the view. Tooltips also offer convenient tools to quickly filter or remove a selection, select marks that have the same value or view underlying data. To edit a tooltip: On the Marks card select Tooltip. Tooltips are specified for each sheet and can be formatted using the formatting tools along the top of the Edit Tooltip dialog box. Use the Insert menu at the top of the dialog box to add dynamic text such as field values, sheet properties, and more.Use the formatting tools along the top of the Edit Tooltip dialog box.(Optional) Use the Insert drop-down list at the top of the dialog box to add dynamic text such as field values, sheet properties, and more. The All Fields option on the Insert menu adds all field names and values that are used in the view. Inserting the All Fields parameter updates the tooltip as you change the view. You can also use the All Fields option to exclude fields. (Optional) Select the Include command buttons option to show filtering and view data options in the tooltip. For example, including command buttons will add Keep Only, Exclude, and View Data buttons to the bottom of the tooltip. These command buttons are available both in Tableau Desktop and when the view is published to the web or viewed on a mobile device.(Optional) Select the Allow selection by category check box to select marks in a view that have the same value by clicking on a discrete field in a tooltip. To get in-depth knowledge, enroll for a live free demo on Tableau Online Training This section describes the basic elements of views that you can create in Tableau. You can show or hide parts of the view as needed (described below). Every view has a table in some form, which may include rows, columns, headers, axes, panes, cells, and marks. Views can optionally include tooltips, titles, captions, field labels, and legends. The View area Data views are displayed in a table on every worksheet. A table is a collection of rows and columns, and consists of the following components: Headers, Axes, Panes, Cells, and Marks. In addition to these, you can choose to show or hide Titles, Captions, Field Labels, and Legends. A. Field Labels - The label of a discrete field added to the row or column shelf that describes the members of that field. For example, Category is a discrete field that contains three members; Furniture, Office Supplies and Technology. B. Titles - The name that you give your worksheet, dashboard, or story. Titles display automatically for worksheets and stories and you can turn them on to display them in your dashboards. C. Marks - The data that represents the intersection of the fields (dimensions and measures) included in your view. Marks can be represented using lines, bars, shapes, maps and so on. D. Legends - A key that describes how the data is encoded in your view. For example if you use shapes or colors in your view, the legend describes what each shape or color represents. E. Axes - Created when you add a measure (fields that contain quantitative, numerical information) to the view. By default, Tableau generates a continuous axis for this data. F. Headers - The member name of a field. G. Captions - Text that describes the data in the view. Captions can be automatically generated and can be toggled on and off. Also see information on Cells and Panes. Headers are created when you place a dimension or discrete field on the Rows shelf or the Columns shelves. The headers show the member names of each field on the shelves. For example, in the view below the column headers show the members of the Order Date field and the row headers show the members of the Sub-Category field. You can show and hide row and column headers at anytime. To hide headers: Right-click (control-click on Mac) the headers in the view and select Show Header. To show headers: Select the field in the view whose headers you want to show and select Show Header on the field menu. Hiding headers can be useful when you are working with multiple measures. For example, the view below shows both the sales and profit for each region along a single axis. You can see the view looks cluttered with the Measure Names headers showing. Because Measure Names is also indicated by the mark color, you can hide the excess headers to clean up the view. Axes Axes are created when you place a measure or continuous field on the Rows or Columns shelves. By default, the values of the measure field are displayed along a continuous axis. You can show and hide axes at any time. To hide axes: Right-click (control-click on Mac) the axis in the view and select Show Header to clear the check mark next to this option. To show axes: Right-click (control-click on Mac) the measure in the view whose axis you want to show and select Show Header on the field menu. Panes A pane is defined by the intersection of fields on the rows and columns shelves. In a table calculation, this is seen as one or more cells that belong to the same field, which are computed down or across according to the calculation, as in the example below: For more information, see Transform Values with Table Calculations. Cells Cells are the basic components of any table you can create in Tableau, defined by the intersection of a row and a column. For example, in a text table, a cell is where the text is displayed, as shown in the view below: Marks When you drag fields to the view, the data are displayed using marks. Each mark represents the intersection of all of the dimensions in the view. For example, in a view with Region and Year dimensions, there is a mark for every combination of those two dimensions (East 2011, East 2012, West 2011, West 2012, etc.). In this case, the mark type is set to Text, so the Abc represents the location where the value for the text mark will appear—once a measure such as Sales is added to the view. For details on creating and customizing marks, see Marks card, Control the Appearance of Marks in the View, Change the Type of Mark in the View, Stack Marks Marks can be displayed in many different ways including lines, shapes, bars, maps, and so on. You can show additional information about the data using mark properties such as color, size, shape, labels, etc. The type of mark you use and the mark properties are controlled by the Marks card. Drag fields to the Marks card to show more data. For example, the same view above is shown again below but this time with Profit on Color. With this additional information, it is clear that the West region had the highest profit in 2014. Control the marks in the view using the Marks card. Use the drop-down menu to specify the type of mark to show. Drag fields to the Marks card and use the drop-down controls to add more information to the view and control the color, shape, size, labels, and number of marks in the view. Tooltips Tooltips are additional data details that display when you hover over one or more marks in the view. When you select one or more marks and hover, tooltips also include options to filter marks (exclude or keep only), display marks that have the same values, create groups, create sets, or display the underlying data. If you don't want users to be able to access tooltip commands, you can disable them. For details on formatting tooltips and other tooltip settings, also see Format Titles, Captions, Tooltips, and Legends, Add tooltips to marks, and Create Views in the View. Tooltips (Viz in Tooltip). For details on analysis options in tooltips, see Explore and Inspect Data in a View Tooltip command buttons for exploring data in a viz The top of the tooltip lists commands for filtering data, creating a group, sorting the selection, and view the underlying data. For example, you can use the tooltip to quickly remove an outlier in a scatter plot. Each of the commands are described below. To see tooltip commands, hover over a mark and then keep the cursor still. The These commands are visible by default. You can disable the commands in the Edit Tooltip dialog box by deselecting Include command buttons. Doing so will also hide the aggregation summary if multiple marks are selected. Disable tooltip commands If you don't want users to be able to access tooltip commands, you can disable them. Click Tooltip on the Marks card or select . In the Edit Tooltip dialog box, clear the Include command buttons check box. Tooltip settings apply to the active worksheet and can be different for each sheet in the workbook. Body text and markup in tooltips The body of a tooltip contains details about a specific mark or a selection of multiple marks. For example, in a bar chart showing sales by region, the tooltip body may include the actual sales amount and the region name. The default tooltip is based on the fields used in the view. You can customize what is shown in the tooltip by dragging fields to Tooltip on the Marks card. To customize a tooltip and its formatting, click Tooltip on the Marks card. Alternatively, you can select . If the sheet has any actions, the action links are listed below the body of the tooltip. An action adds context and interactivity to your data through filters, highlighting, and links to external resources. See Actions to learn more about adding actions to your workbook. Titles You can show titles on any worksheet, dashboard, or story. For worksheets and stories, a title is displayed by default, but you can remove it. For dashboards, you can add a title. By default, the title is the name of the sheet, but you can edit the title to change the text and include dynamic values such as page number and sheet name. For more information about how to format titles, see Format Titles, Captions, Tooltips, and Legends. Show and hide titles in worksheets Titles are shown by default for worksheets and are included as part of the worksheet, shown at the top of the view. You can move the title to the sides or the bottom of the view. However, when you move the title from the top of the view, it becomes a Title card and displays like any other card in the view. Note: If you move a title from the top position and then hide it, when you show the title again, it appears back at the top of the worksheet in its default position. To show or hide titles in a worksheet From the toolbar menu, click Worksheet > Show Title. On the toolbar, click the drop-down arrow on the Show/Hide Cards button and select Title from the context menu. Toggle the check mark on or off to show or hide the title. Show and hide titles in dashboards You can turn on titles for dashboards. The title appears as part of the dashboard. To show or hide titles on a dashboard, from the toolbar menu, select Dashboard > Show Title. When you add worksheets to the dashboard, the title of the worksheet automatically shows, even if you turned off the title on the worksheet itself. To turn off the title for the worksheet on the dashboard, do the following steps: In the dashboard, select the worksheet to highlight it. In the top right corner of the highlighted worksheet, click the drop-down arrow and select Title in the context menu to clear the check mark. Show and hide titles in stories Story titles are displayed by default. To toggle story titles on or off, in the top menu, select Story > Show Title to add or remove the check mark. Captions All views can have a caption that is either automatically generated or manually created. The caption is displayed on the Caption card. To show a caption in a worksheet, select it on the Show/Hide Cards toolbar menu or select Worksheet > Show Caption. The caption is automatically generated by default. To edit the caption, double-click the Caption area in the view. In the Edit Caption dialog box, you can use change the font, size, color, and alignment and style. Click the Insert menu to add automatic text such as page number, sheet name, and field and parameter values. The caption can optionally be included when printing, printing to PDF, and publishing to Tableau Server. When you export the view as an image to another application like Microsoft PowerPoint, you can optionally include the caption. Field Labels Placing discrete fields on the rows and column shelves creates headers in the view that display the members of the field. For example, if you place a field containing products on the rows shelf, each product name is shown as row headers. In addition to showing these headers, you can show field labels, which are labels for the headers. In this example, the rows are labeled Category, to indicate that the discrete category names are members of the Category field. Field labels apply only to discrete fields. When you add continuous fields to the view, Tableau creates an axis. The axis is labeled with a header. By default, field labels are shown. To hide or show field labels, select Analysis > Table Layout > Show Field Labels for Rows or Show Field Labels for Columns. You can format the fonts, alignment, shading, and separators for field labels. Legends When you add fields to Color, Size, and Shape on the Marks card, a legend displays to indicate how the view is encoded with relation to your data. Color Legend Size Legend Shape Legend Not only do legends help you understand encodings, you can also use legends to sort, filter, and highlight specific sets of data. For more information, see Legend Highlighting(Link opens in a new window). Measure values and color legends If you include the Measure Values and Measure names fields in your views, you can create either a single combined color legend or separate color legends for your measures. If you drag the Measure Values field to Color on the Marks card, by default Tableau creates a single color legend that applies one color palette to all marks in the view. If you want to differentiate certain measures in the view you can create separate color legends for the measures and assign a unique color palette to each legend. For more information about Measure Values and Measure Names, see Measure Values and Measure Names. The following example shows how to create separate color legends. This example uses the Sample Superstore data set. Connect to the Sample-Superstore data set. From the Data pane: Drag Order Date to the Columns shelf and Category and Sub-Category to the Rows shelf. Drag Measure Names to the columns shelf and drop it to the right of Order Date. Drag Measure Values to Color on the Marks card. In the Measure Values card, drag measures off the card so that you keep SUM(Sales), and SUM(Profit) only. Click Label on the Marks card and select Show mark labels to show the measure values in the view. When you drag Measure Values to Color on the Marks card, Tableau creates a single color legend and adds it to the view. Your view should look something like this. To create separate legends for each measure on the view, click the drop-down arrow on the Measure Values field in the Marks card and select Use Separate Legends from the context menu. Tableau Desktop version Web version Tableau creates an individual color legend for each measure in the view using the default color palette. To assign a different color palette to the color legend, do one of the following: In Tableau Desktop, click the drop-down arrow in the top right corner for each color legend and select Edit Colors. Then select a color from the Palette drop-down list. In Tableau Server or Tableau Online, click the drop-down arrow in the top right corner for each color legend. Then select a color from the Palette drop-down list. Your view might look something like the following example: To combine the separate legends back to a single legend, click the drop-down arrow on the Measure Values field on the Marks card and select Combine Legends from the context menu. Tableau Desktop version Web version

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