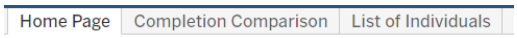
Quick Reference for Using Institutional Tableau Workbooks

NAVIGATION

- 

Click any tab at the top of the workbook to navigate to the dashboard
- Click the undo button at the top or bottom of the workbook to undo previous actions
- Click the revert button at the top or bottom of the workbook to reset to original state.
- Click the info button to go to the technical notes page containing details about the workbook and its data.
- The help button links to this KnowledgeBase document for assistance using the workbook.

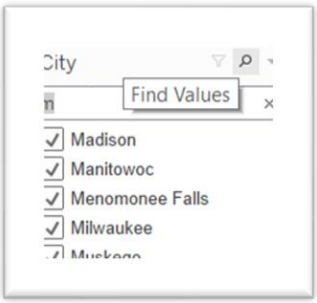
FILTERING THE DATA

- Most dashboards contain filters located to the left of the worksheet(s) that allow you to filter down to data of interest. Select the options you want from the filters and the view will automatically update. In some cases, you must click an "Apply" button in the filter dialogue.
- Different types of filters include single or multiple value lists, sliders, date filters, and single or multiple value dropdowns.

- Filters have additional options that display when you hover over the filter area on the page. Some workbooks have filtering options on the dropdown menu such as: "Include Values" and "Exclude Values". This is helpful when it is easier to remove what you don't want to see, rather than selecting all that you do want to see.

Filter Search Box

  - Some filters also have the option to search quickly to find and select the value you are looking for.



  - Click the search button that appears when you hover over the filter or look for the search box at the top or bottom of a drop-down filter.
  - Start typing the value you are looking for and the results show directly below or above the search box.

- For more information, see the KB article:

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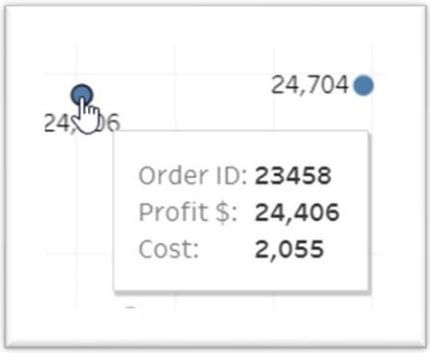
[Getting Started with Sorting, Drilling Down and Filtering Data]

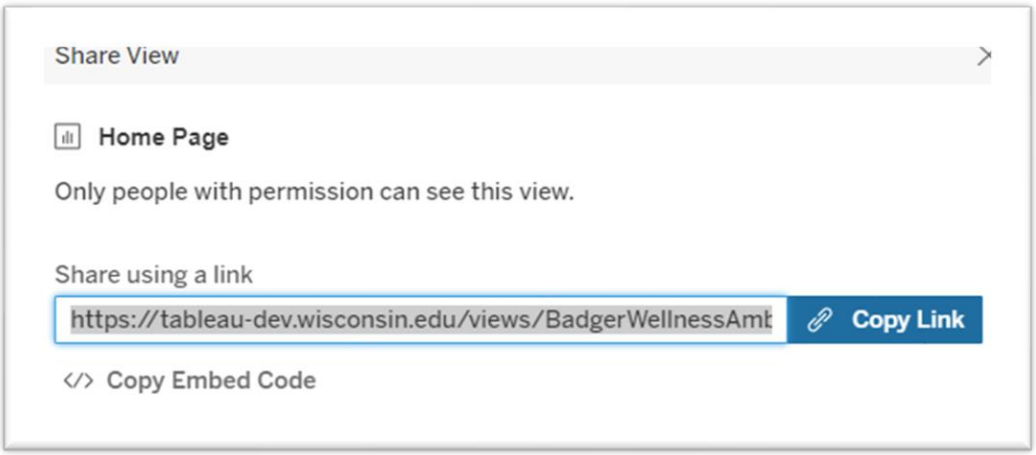
TOOLTIPS

- Most dashboards contain additional information in the form of tooltips. A tooltip is associate with a specific data point or graph. If you hover your cursor over the mark in the worksheet you will see additional information



SHARING THE VIEW

- Click the "Share" in the upper or lower right corner of the view.
- Copy the provided link and paste into an email or other application.



- For more information, see the KB article:
  [Sharing Tableau Workbooks and Dashboards]

DOWNLOADING THE VIEW

- Click anywhere in the worksheet.
- Click the Download icon in the upper or lower right corner of the view.
- Select one of the dropdown menu options for download format. Not all download options are always available.

PRINTING THE VIEW

- Click "Download" in the upper or lower right corner of the view.
- From the dropdown menu select PDF to download the view as a PDF file.
- Choose to include the current view only or specific sheets from the workbook.

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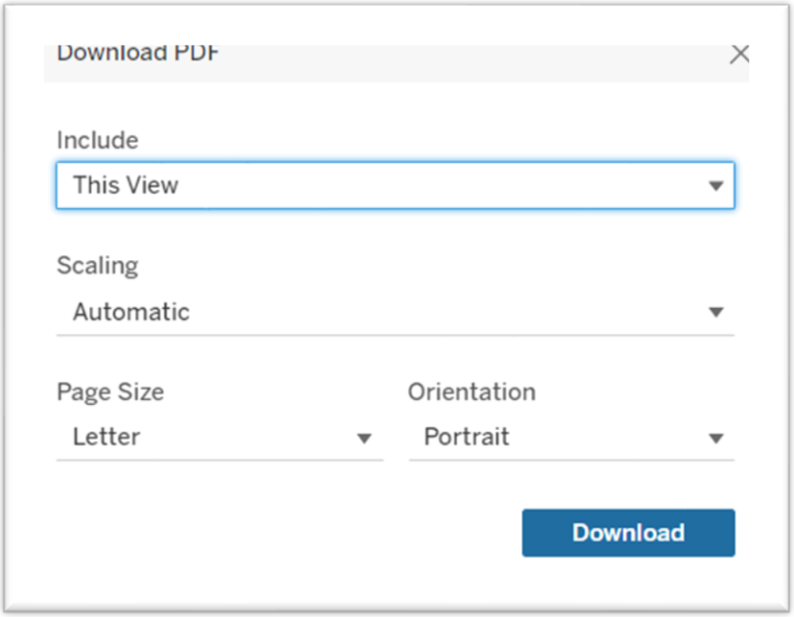
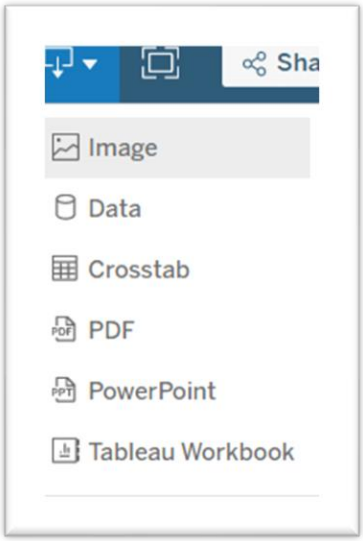
- Most workbooks are landscape and should be printed as landscape for best results.
- The PDF file will download or display. Print from within your PDF reader application.



- For more information, see the KB article: [Printing Tableau Dashboards and Workbooks]

EXPORTING THE DATA

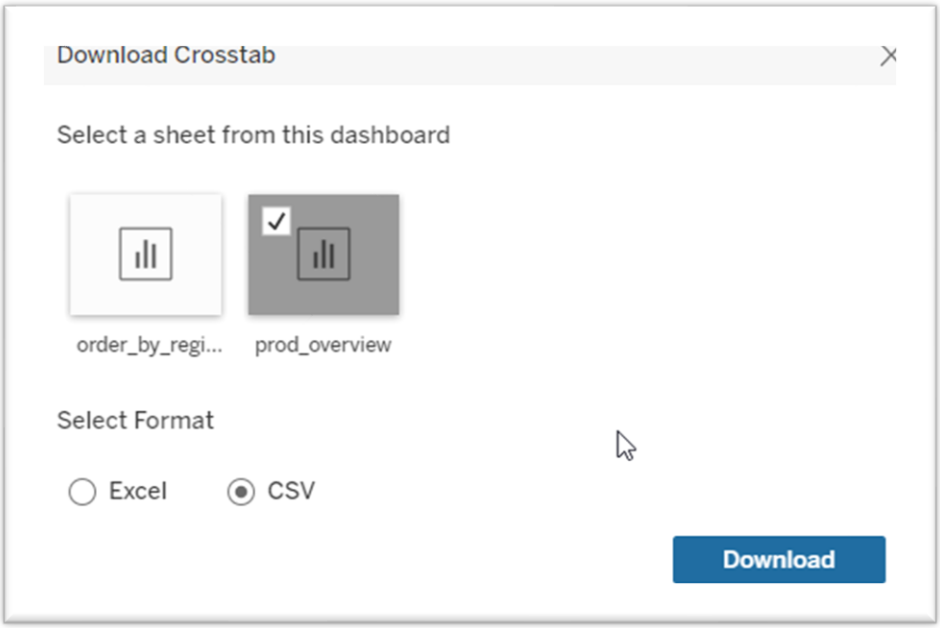
- Click anywhere in a chart or graph of interest.
- Click the "Download" icon in the upper or lower right corner of the view:



- Select one of the following options if available:
  - Data: opens a new tab in the browser window and displays the worksheet's data in summary and full (there will be two tabs when both summary and full data are available). You can download the data as a Microsoft Excel file or a comma-separated value (.csv) file. We recommend that you select "csv" option. By default,

Tableau chooses "Excel" for you.

- Crosstab: download the view as a Microsoft Excel file or a .csv file.
  We recommend that you select "csv" option.



- In some cases, these options will not be available.
- For more information, see the KB: [Exporting Tableau Data into Excel]

NEED MORE INFORMATION OR HELP?

- Each UW-Madison institutional Tableau workbook has a contact email address, in the footer of each view, where you may direct questions about the workbook, provide feedback, or request accessibility assistance.