Tableau Quick Reference Cheat Sheet

Tableau Screen

Navigation menu

Tool Bar

Columns & Rows bar

Tableau - Book2

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Standard

Show Me

Data | Analytics

Orders (Superstore Sales....

Search

Tables

- # Row ID
- Ship Date
- Abc Ship Mode
- State
- Abc Supplier
- Zipcode
- Abc *Measure Names*
- # Discount
- # Discounted Price
- # Order Quantity
- # Product Base Margin
- # Profit
- # Sales
- # Sales Target
- # Shipping Cost
- # Unit Price
- *Latitude (generated)*
- *Longitude (generated)*
- # *Orders (Count)*
- # *Measure Values*

Pages

Filters

Marks

Automatic

Color   Size   Text

Detail   Tooltip

Columns

Rows

Profit for each Product Category

Drop field here

Sheet label

Drop field here

Pages card, Filters card and Marks card

Data Source | Profit | Sheet 2

Data Pane/ Side bar

Sheet Tab

Status bar

Canvas

Quick Reference

Topic	Icon/Course of Action	Purpose
Clear worksheet		To clear the worksheet.
Duplicate worksheet		To copy the worksheet.
Hide/Show Side bars	Click "Window" from the navigation menu and check/uncheck the bars.	To maximize canvas space or use functions with ease.
Hide/Show Cards		To maximize canvas space or use functions with ease.
Sheet name with color options	Double click the sheet tab to rename the worksheet. Right click to change color	For quick and easy reference.
Sheet label with color options	Double click the sheet title and rename/change the title. Format to change color.	To provide some details to the audience.
Formatting single worksheet	Click "Format" on the navigation menu and select "Workbook".	To be able to change the format as needed.
Formatting all worksheets	Right click on the canvas and select format.	To apply consistent format throughout the workbook.
Redo	→	To restore any action previously undone.
Sort Ascending		To order from smallest to largest.
Sort Descending		To order from largest to smallest.

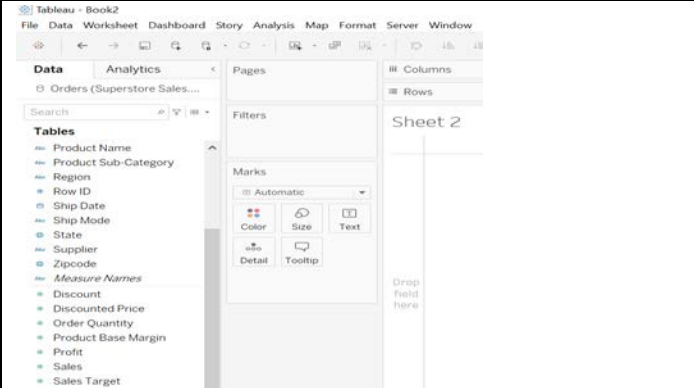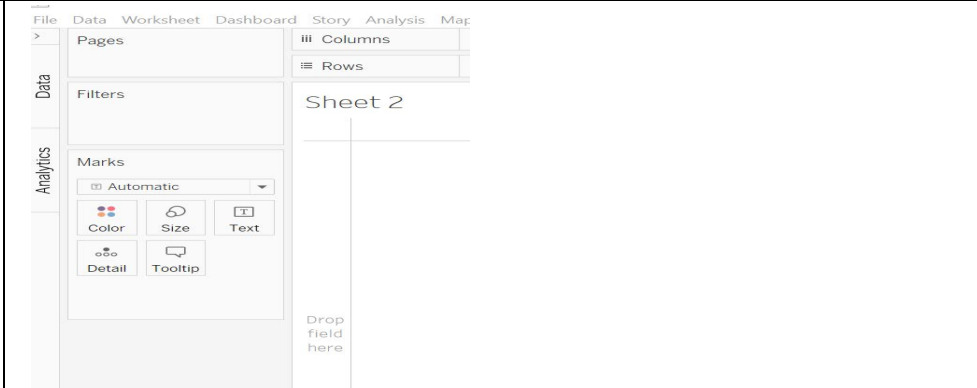| Show/hide mark of the measures on the columns or rows.	T	To show/hide the data labels/points on the visualizations.
Show/hide mark of the measures not on the columns or rows.	T Label	To show/hide the data labels/points on the visualizations.
Undo	←	To reverse an action/mistake.

Clear Worksheet

Purpose	To clear the worksheet.
Icon	10th icon on the tools bar.
Shortcut	<u>Windows:</u> Alt+Shift+Backspace <u>Mac:</u> Option-Shift-Delete
How and Why	Click on the icon or use the shortcut to remove all fields, formatting, sizing, axis ranges, filters, sorts, and context filters in the sheet. In other words, to undo all steps and start from scratch in a single click.

Duplicate Worksheet

Purpose	To copy the worksheet.
Icon	9th icon on the tools bar.
How and Why	Click on the icon or right click on the sheet tab/name at the bottom and select "duplicate." Duplicating the sheet allows you to modify the worksheet without losing the orginal version.
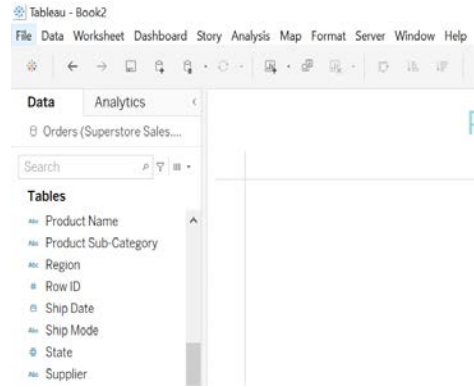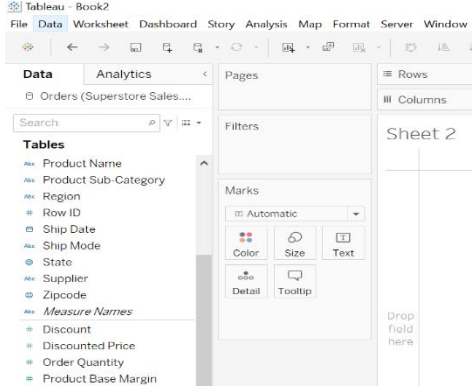
Hide/Show Side Bars

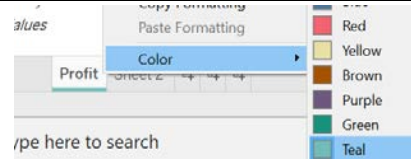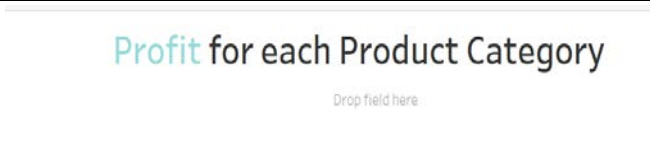|	**Hide Bars**	**Show Bars**
Purpose	To increase the viewing space in Tableau.	To be able to use the Tableau functions with ease.
How and Why	Click "Window" from the navigation menu and uncheck the bars to hide/remove to expand the viewing space/canvas in tableau.	Click "Window" from the navigation menu and check the bars to show the bars.
Picture Reference		

Hide/Show Cards

*The cards can also be moved around by using the move cursor.
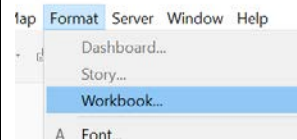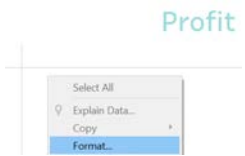
	Hide Bars	**Show Bars**
Purpose	To increase the viewing space in Tableau.	To be able to use the Tableau functions with ease.
Icon	19th icon on the tools bar.	19th icon on the tools bar.
How and Why	Click the icon and uncheck the card from the drop-down menu to hide the card or select "Show cards" under "Worksheet" from the	Click the icon and check the card from the drop-down menu to show or select "Show cards" under "Worksheet" from the navigation menu to show the card. All cards can be shown by selecting reset cards.

	navigation menu to hide the card to expand the viewing space/canvas in tableau.	
Picture Reference		

Sheet Name and Sheet Label with Color Options

	Sheet Name	Sheet Label
Purpose	For quick and easy reference.	To provide some details to the audience.
How and Why	Double click the sheet tab on the bottom left to rename the worksheet. To underline the sheet name, right click and select the color. It can serve as a reminder for the worksheet to be pulled into the dashboard.	Double click the sheet title and rename/change the title. To format the title, select the word or the complete title as desired. This allows you to change the format/color of the complete title or a single word to create a relation/emphasis.
Picture Reference		
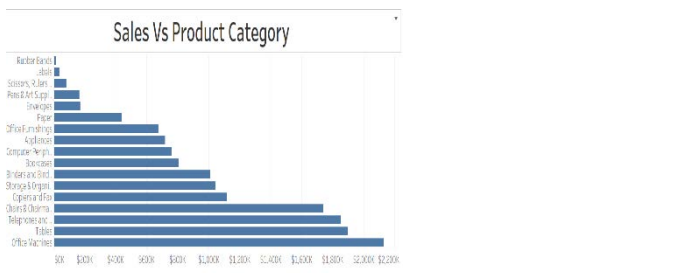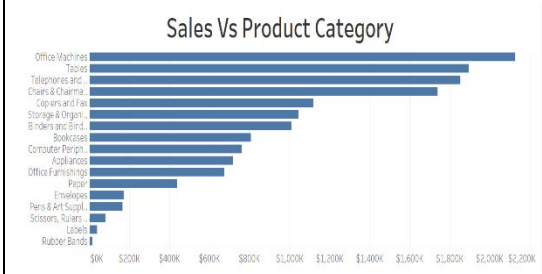
Formatting Worksheets

	All Worksheets	**One Worksheet**
Purpose	To apply consistent format throughout the workbook.	To be able to change the format as per the need.
How and Why	Click "Format" on the navigation menu and select "Workbook." A format window will pop up in the data pane. Then choose the desired formatting to format all worksheets to save time.	Right click on the canvas and select "Format." A format window will pop up in the data pane. Then choose the desired formatting to format the current work sheet.
Picture Reference		

Undo/Redo
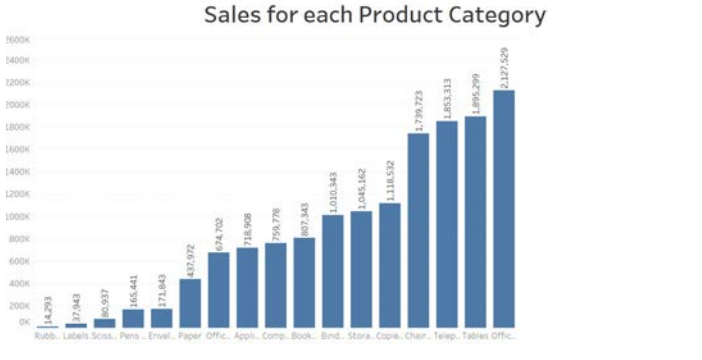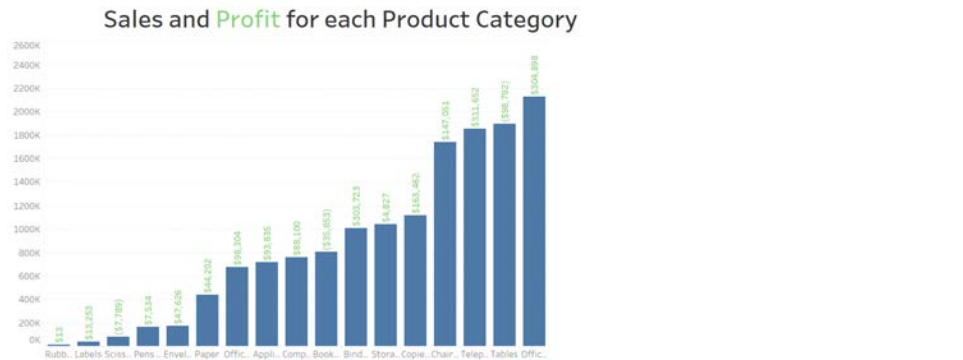
	Undo	**Redo**
Purpose	To reverse an action/mistake.	To restore any action previously undone.
Icon	← 2nd icon on the left-hand side on the tools bar.	→ 3rd icon on the left-hand side on the tools bar.
Shortcuts	<u>Windows:</u> Ctrl+Z <u>Mac:</u> Command-Z	<u>Windows:</u> Ctrl+Y <u>Mac:</u> Command-Shift-Z
How and Why	Click as many times as required to reverse the actions.	Click as many times as required to restore the desired actions.

Sort

	Ascending	**Descending**
Purpose	To order from smallest to largest.	To order from largest to smallest.
Icon	12th icon on the tools bar.	13th icon on the tools bar.
How and Why	Click the icon to quickly identify the least levels of the feature. For example, lowest selling products.	Click the icon to quickly identify the highest levels of the feature. For example, highest selling products.
Picture Reference		

Show/Hide Marks Label

	Show/hide mark of the measures on the columns or rows.	Show/hide mark of the measures not on the columns or rows.
Purpose	To show/hide the data labels/points on the visualizations.	To show/hide the data labels/points on the visualizations.
Icon	[T] 16th icon on the tools bar.	[T] Label option is in the Marks Card on the left side of canvas. Label
How and Why	Click the icon to automatically show the data points of the measurable quantity on the visualization. To hide/remove the labels, click on the icon again.	Drag the desired measure onto the Marks Card under Label. The labels can be formatted using the drop-down menu and selecting "Format" from the Marks Card pill. To hide/remove the labels, drag the pill back to the data pane or over the navigation menu.
Picture Reference		

Sales for each Product Category

Sales and Profit for each Product Category