QUANZETTA

# Zaid's Tableau Cheat Sheet

Chart chooser, key formulas and shortcuts on one sheet

Dimensions | Measures | Show Me | Calculated Field | Dashboard

**Every step from «Tableau Made Simple» on one sheet: how to choose a chart, the key formulas and the shortcuts, with examples from the Liyaqa gym practice file.**

## The workspace

1. **Tableau Public · free**
   Works in the browser or as a desktop app for Windows and Mac. Everything you save is published publicly.

2. **Data pane (left)**
   Every column of your file. Blue fields are Dimensions, green fields are Measures.

3. **Columns and Rows shelves**
   Drop fields here and Tableau draws the chart for you.

4. **Marks card**
   Color, Size, Label, Detail and Tooltip: drop a field on one to change how the marks look.

5. **Filters shelf**
   Drop a field here to keep only the values you choose. Right-click → Show Filter to let viewers choose.

6. **Tabs at the bottom**
   Sheet = one chart · Dashboard = several sheets on one page · Story = sheets in order, like slides.

## Connecting data

7. **Connect → Microsoft Excel**
   Pick the file, then drag the sheets onto the canvas.

8. **Relationships**
   Drag Payments first, then Branches and Members. Tableau links them on the shared field: **[Branch Id]**, **[Member Id]**.

9

**Dimension or Measure?**

Ask "how much?" → Measure. Ask "by what?" → Dimension.

## Choosing the right chart

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**Comparison → bars**

Revenue by branch. Sort with the Sort button so the biggest is on top.

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**Time → line**

Revenue by month: up, down or flat.

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**Place → map**

Tableau recognises city names; circle size = revenue.

13

**Show Me**

Highlights the charts that fit the fields you selected.

14

**Swap Rows and Columns**

Turns horizontal bars into vertical columns.

## Making the chart speak

15

**Color with intent**

One color for what matters (Khalda), grey for the rest.

16

**Label**

Drop SUM(Amount) on Label to print the numbers on the bars.

17

**Color by a dimension**

Plan on Color splits every bar by Monthly, Quarterly and Annual.

## Calculated fields

18 **Revenue per member**

`SUM([Amount]) / COUNTD([Member Id])`

19 **COUNTD**

Counts distinct values: one member who paid four times counts once.

20 **Payments per member**

`COUNT([Payment Id]) / COUNTD([Member Id])`

21 **Condition**

`IF [Plan] = "Monthly" THEN [Amount] END`

22 **Month of a date**

`DATETRUNC('month', [Payment Date])`

## Quick table calculations

23 **Percent of Total**

Right-click SUM(Amount) → Quick Table Calculation → Percent of Total. Use it for shares.

24 **Running Total**

Same menu → Running Total. Use it for progress toward a goal.

25 **The same as formulas**

`SUM([Amount]) / TOTAL(SUM([Amount]))` · `RUNNING_SUM(SUM([Amount]))`

## Dates

26 **The date hierarchy**

YEAR → QUARTER → MONTH → DAY.

27

**Drill Down**

Click the + on YEAR(Payment Date) to go to quarter, then month.

## Dashboard and story

28

**New Dashboard**

The dashboard icon at the bottom. Drag sheets from the left onto the page.

29

**Fixed size**

So the dashboard looks the same on every screen.

30

**Most important number top-left**

Eyes go there first.

31

**Filter on all sheets**

Filter menu → Apply to Worksheets → All Using This Data Source.

32

**Use as Filter**

Click a branch and the other charts filter to it (a filter Action).

33

**Story**

One finding per story point, with a title that states the result.

## Publish safely

34

**Save = publish**

Saving to Tableau Public creates a link. Share → Copy Link, or use the embed code.

35

**Public means public**

Anyone can view it and download the data. No real names, phone numbers, salaries or confidential figures.

36

### Real data?

Remove names and use aggregated numbers, or use a paid Tableau edition that controls who can see it.

## Shortcuts (desktop app)

37

### New sheet · swap · Show Me

`Ctrl+M` new worksheet · `Ctrl+W` swap rows and columns · `Ctrl+1` Show Me (Cmd on Mac).

38

### Undo · save · present

`Ctrl+Z` undo · `Ctrl+S` save · `F7` presentation mode.

39

### Faster dragging

Double-click a field to add it to the view · Ctrl+drag a pill to copy it.

Practice data: the fictional Liyaqa gym (5 branches, 1,264 members, 3,376 payments). Not affiliated with Tableau or Salesforce.