

# Tableau-Desktop Shortcuts & Terminologies CHEAT SHEET

## What is Tableau?

A powerful Data visualization and Business intelligence tool with a strong and intuitive interface. No coding knowledge or experience needed to work with Tableau.

## Data Short Cuts:

Data	Operation
ALT+D+A	Automatic updates
ALT+D+D	Connect to data
CTRL+D	Connect to data source
ALT+D+C+D	Duplicate data connection
ALT+D+A	Extract
ALT+D+C+P	Properties of data connection
ALT+D+R	Refresh data
F5	Refreshes the data source
F9	Run query
ALT+D+U	Toggle use extract
F10	Toggles automatic updates on and off
ALT+D+P+D	Update dashboard
ALT+D+P+Q	Update quick filters
ALT+D+P+W	Update worksheet

## File Short Cuts:

File	Operation
ALT+F4	Closes the current workbook
ALT+F+E+I	Export to image
ALT+F+E+P	Export to packaged workbook
CTRL+N	New workbook
CTRL+O	Open file
CTRL+P	Print
CTRL+S	Save file

## File Short Cuts:

Analysis	Operation
ALT+A+A	Aggregate measures
ALT+A+C	Create calculated field
ALT+A+B	Describe trend model
ALT+A+U	Edit calculated field
ALT+A+L	Edit trend lines
ALT+A+F	Filter
CTRL+1	Show me!
ALT+A+S	Sort
ALT+A+M+F	Stack marks off
ALT+A+M+O	Stack marks on

## Get started with Tableau

- Tableau is BI software
- Allows users to connect to data, visualize data and create interactive and sharable dashboards.

## Design Flow

Connect to Data Source → Build Data Views → Enhance Data Views → Worksheets → Create and Organize Dashboards → Story Telling

## Tableau Terminologies

**Alias:** Refers to a field or to a dimension member

**Bin:** User-defined grouping of measures in the data source

**Bookmark:** .tbn file in the Bookmarks folder contains a single worksheet of the Tableau repository

**Calculated Field:** New field created by using a formula to modify the existing fields in data source

**Crosstab:** Text table view to display the numbers associated with dimension members

**Dashboard:** Use dashboards to compare and monitor a variety of data simultaneously

**Data Pane:** Displays the fields (divided into dimensions and measures) of the data sources to which Tableau is connected

**Data Source Page:** A page to set up your data source consists of – left pane, join area, preview area, and metadata area

**Dimension:** Categorical data field holds discrete data such as hierarchies and members that cannot be aggregated

**Extract:** A saved subset of a data source that can be used to improve performance and analyze offline.

**Filters Shelf:** Used to exclude data from a view by filtering it using measures and dimensions

**Format Pane:** Contains formatting settings that control the entire worksheet, as well as individual fields in the view

**Level of Detail (LOD) Expression:** A syntax that supports aggregation at dimensionalities other than the view level.

**Marks:** A part of the view that visually represents one or more rows in a data source. A mark can be, for example, a bar, line, or square. You can control the type, color, and size of marks

**Marks Card:** A card to the left of the view, where you can drag fields to control mark properties such as type, color, size, shape, label, tooltip, and detail

**Pages Shelf:** Used to split a view into a sequence of pages based on the members and values in a discrete or continuous field

**Rows Shelf:** Used to create the rows of a data table, also accepts any number of dimensions and measures

**Worksheet:** A sheet to build views of the data

**Workbook:** Contains one or more worksheets



FURTHERMORE:  
Tableau Training and Certification - Tableau 10 Desktop Course

