Free Training Transcript: Tableau Mobile

Introduction

Welcome to this video on Tableau Mobile. Tableau Mobile is the fastest and easiest way to interact with your data from anywhere at any time. Explore your data, discover insights, and make better decisions all while on the go. Let's give it a try!

To follow along, you will need access to a Tableau Online or Tableau Server site as well as the Tableau Mobile app. Downloading the app is easy – Simply search the Apple App Store or the Google Play Store for Tableau. Whether you use an iOS or Android device, the Tableau Mobile app experience and functionality are exactly the same.

Business Scenario

Here is our scenario. We would like to locate our Superstore Sales workbook, interact with its content, and set it as a favorite so we can access its content more easily in the future (even when our device is offline).

Logging In

When we open the Tableau Mobile app, we first must connect to Tableau Server or Tableau Online. We enter our credentials and then select a site to log into. Our Favorites appear first. The Superstore Sales workbook is not yet one of our favorites. Let's tap on Explore to browse or search for it.

Explore

We tap on Explore to browse the content within a site. At the top we see content that we have accessed recently. Below that, we see the list of top-level projects within the site. We haven't accessed the Superstore Sales workbook recently. Let's tap on the Sales & Marketing project to locate it. The Sales & Marketing project page displays a collapsed list of the subprojects, workbooks, and views within it. Let's tap on the Sales subproject to explore its workbooks and views. Here we find the Superstore Sales workbook.

Searching

Searching is another way to locate our content. To perform a search, we tap on Explore and tap on the Search box. Let's type in "Sales" to help us search for the "Superstore Sales" workbook. The search results display projects, workbooks, and views that match our search criteria. We see our Superstore Sales workbook within the results. When we tap on it, we see the workbook page.

Switching Views

The Superstore Sales workbook contains six views. We tap on a view to open it. To switch between views, we tap on the selector at the top and select a different view from the workbook. We can also tap the back button to return to the workbook page.

Favorites

We tap on the star at the top right of our Superstore Sales workbook to set it as a favorite. The same star can be used to unset a favorite. When we tap on Favorites, we see that the Superstore Sales workbook is the most recently added favorite. When we tap on Superstore Sales, we see its views. The checkmark added to each favorite workbook or view indicates that the content has been downloaded to our phone, enabling Interactive Previews.

Interactive Previews

Interactive Previews are extremely powerful. They enable offline viewing. Interactive Previews also speed up our Tableau Mobile experience when our phones are online. As an example, let's tap on the Customer view. We can scroll within a viz, reveal tooltips, scroll up and down the page, and tap and drag to apply multiple selections (including highlighting actions).

Live Views

Certain features require a live view. Let's examine the Executive Overview to see an example. When we attempt to adjust the filters of the Interactive Preview, we see a message indicating that filters are disabled in Preview mode. Also, when we tap on a state, we see a basic tooltip and the selected state does not filter the state in the vizzes below the map.

When we tap Go Live, we are now able to modify the filters, see a Viz-in-Tooltip when we select a state, and have our selected state affect the filtering of the vizzes below. We can also perform advanced selections within our map. Other features that require us to Go Live include combined tooltips, trend lines, and reference lines.

Menu (in a Workbook or View)

The top right menu enables us to undo and redo recent interactions. We can also revert a view to its original appearance. We can share a link to a view with others via text message, email, or social media app. If we select a continuous numeric axis, we can set an alert to email us when a condition is met. Other menu options include refreshing the data, reloading or downloading the view, or viewing the Desktop Layout.

Linking to Other Views

Tableau Mobile now also allows linking from one view to another while staying within the app. This view contains links to three views from three separate workbooks. When we tap on International Tourism, we are taken to its view while staying within the app.

Main Menu

From the Favorites page, we can identify the site we are logged into and access the app settings. To switch sites, sign out and sign in again.

Additional Help

Tap on Help & Support for additional help on the use of the Tableau Mobile app.

Conclusion

Thank you for watching this video on Tableau Mobile. We invite you to continue with the free training videos to learn more about using Tableau.