

Cheat Sheet – Tableau For Dummies

From [Tableau For Dummies](#) by Molly Monsey, Paul Sochan

A Tableau Glossary

Want to be a master at Tableau? To get you started, you need some new vocabulary. Accelerate your mastery of Tableau by knowing these key terms.

- **Sheet:** A sheet is a singular chart or map in Tableau.
- **Dashboard:** A dashboard is a canvas for displaying multiple sheets at a time and allowing them to interact with each other.
- **Workbook:** A workbook is the entire Tableau file containing your sheets and dashboards.
- **Measure:** A variable from the dataset that is meant to be aggregated. (This means it should be a number that it makes sense to do math with: sum, average, and so on.) Measures are often continuous data. Examples include GPA, sales, quantity, quota, height, and salary.
- **Dimension:** A categorical variable from the dataset that is used to slice and dice the data into different categories. Dimensions are often discrete data. Examples include country, gender, student ID, and name.
- **Filter:** A filter is used to limit what data is being displayed on the sheet. Visible controls for a filter on a sheet or dashboard are called Quick Filters.
- **Tooltip:** Tooltips are text boxes that appear when hovering over a mark on a sheet in order to give more information. The text and text formatting in them are easily edited through the Marks card.
- **Marks card:** The Marks card is the tool used to create a sheet that controls most of the visual elements in a sheet. Using the Marks card, you can switch between different chart types (bar, line, symbol, filled map, and so), change colors and sizes, add labels, change the level of detail, and edit the tool tips.
- **Rows and Columns Shelves:** The Rows shelf and the Columns shelf is where you determine which variables will go on what axis. Put data you want displayed along the X-axis on the Columns shelf and data you want displayed on the Y-axis on the Rows shelf.

Keyboard Shortcuts for Tableau

Simplify your Tableau experience with the help of keyboard shortcuts. These shortcuts can help you make quick work of your data while making the most of your charts.

New worksheet	Ctrl+M	Command- T
New workbook	Ctrl+N	Command- N
Undo	Ctrl+Z	Command- Z
Redo	Ctrl+Y	Command- Shift-Z
Clear the current worksheet	Alt+Shift+Backspace	Option- Shift- Delete
Describe sheet	Ctrl+E	Command- E
Adds a field to the view	Double-click	Double-click
Place selected field on Columns shelf	Alt+Shift+C	Option- Shift-C
Place selected field on Rows shelf	Alt+Shift+R	Option- Shift-R
Opens the Drop Field menu	Right-click+Drag to shelf	Option- Drag to shelf
Swap rows and columns	Ctrl+W	Control-Command-W
Open Show Me	Ctrl+1, Ctrl+Shift+1	Command-1
Connect to data source	Ctrl+D	Command-D
Refreshes the data source	F5	Command-R
Clears the selection	Esc	Esc
Selects the mark	Click	Click
Selects a group of marks	Drag	Drag
Adds individual marks to the selection	Ctrl+Click	Command-Click
Adds a group of marks to the selection	Ctrl+Drag	Command- Drag