

URL ACTIONS In Tableau

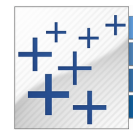
INNOVATIVE. CREATIVE. EFFECTIVE.



URL ACTIONS IN TABLEAU

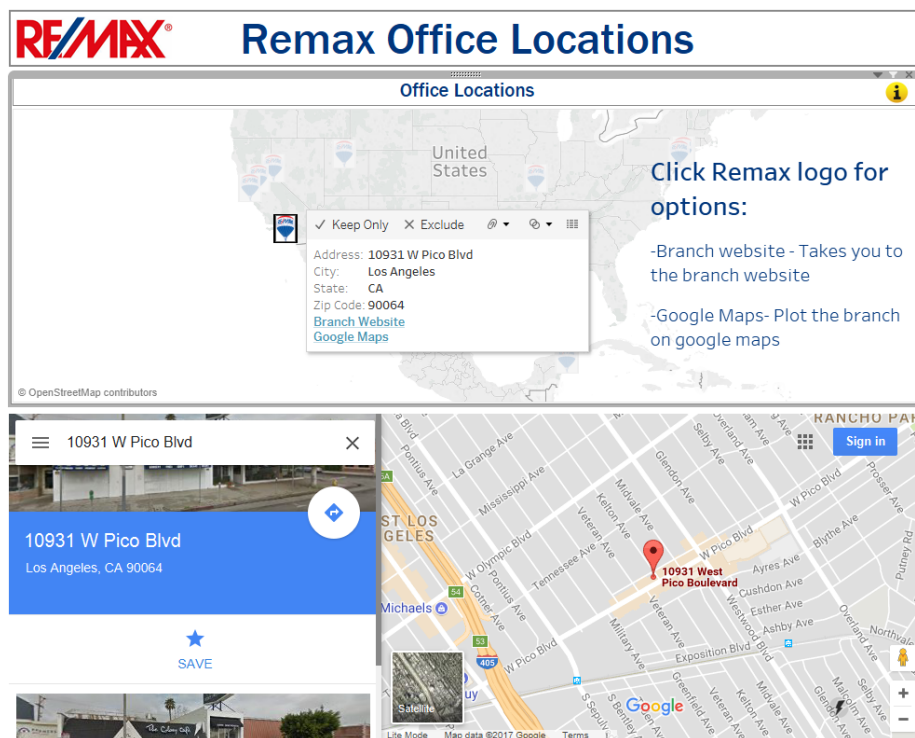
URL actions in Tableau isn't something that is commonly used, but when it is used it can leave quite an impact in the final dashboard. Adding a URL to a dashboard can provide more than just a straight link to a webpage such as Wikipedia. You can use a combination of different URL actions to really add a cool effect. The action can also allow you to give the viewer quick access to images, Websites, videos or anything else really. Here I am going to show you a few examples of how to use a URL Action, after that it's up to you to be creative and find different ways of using this awesome action!

You can view the workbook by clicking on the Tableau Icon here:



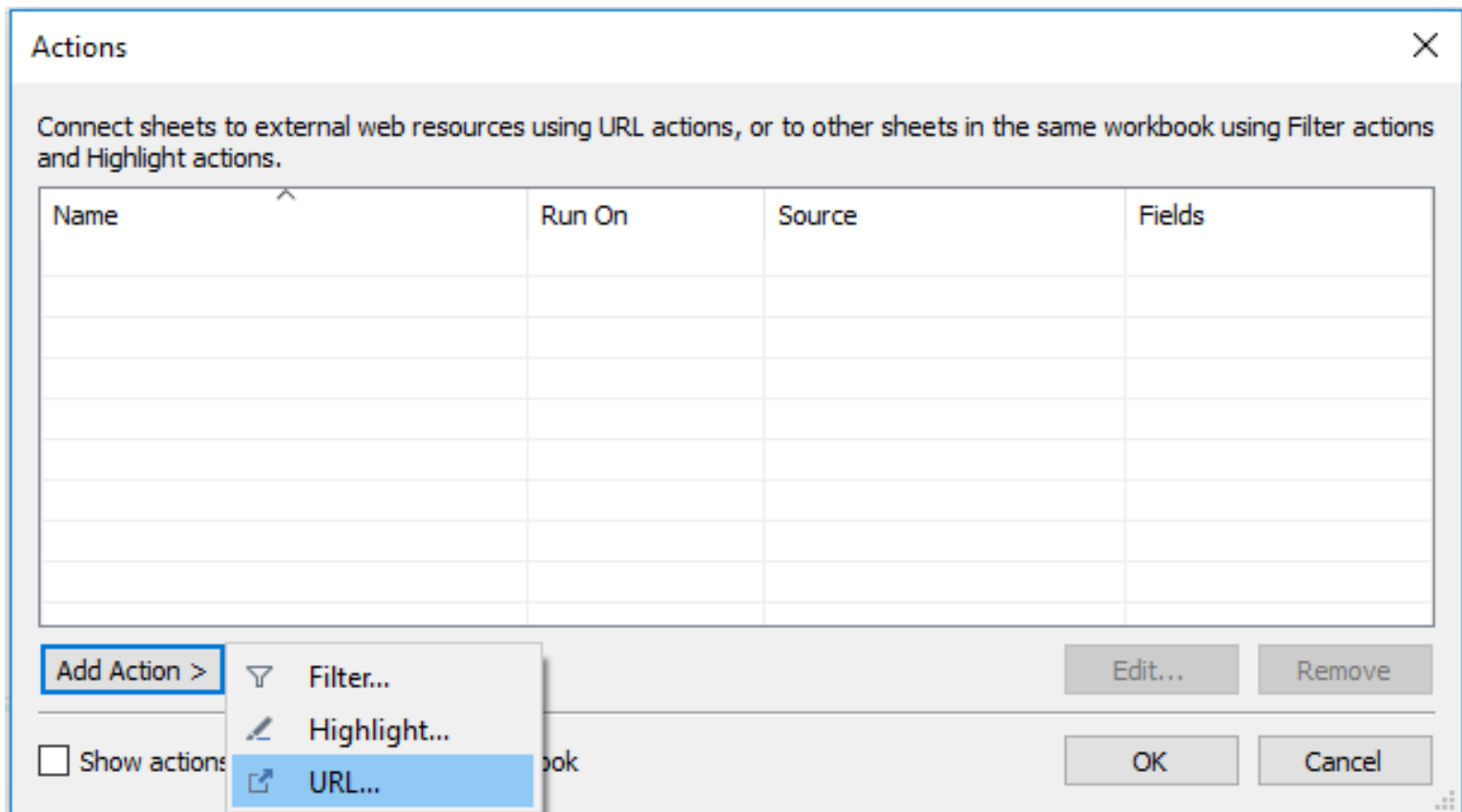
1) OFFICE LOCATIONS DASHBOARD

Overview: In this dashboard we are going to be looking at Remax Office Locations and the end-user will be able to click on the location in the map and either go to that locations website or map the location on Google Map.



The screenshot displays a Tableau dashboard titled "Remax Office Locations". The main view is a map of the United States with a tooltip for a specific location: "10931 W Pico Blvd, Los Angeles, CA 90064". The tooltip includes a "Branch Website" link and a "Google Maps" link. To the right of the map, there is a text box that says "Click Remax logo for options:" followed by two bullet points: "-Branch website - Takes you to the branch website" and "-Google Maps- Plot the branch on google maps". Below the main map, there is a smaller view of the Google Maps interface for the same address, showing a street view and a "Sign in" button.

Instructions: Once your dashboard has been created, it is a fairly easy process to create a URL action. At the top click *Dashboard* and then *Actions*. Once you've clicked that a window will pop up, click *Add Action* and then *URL*.



Actions

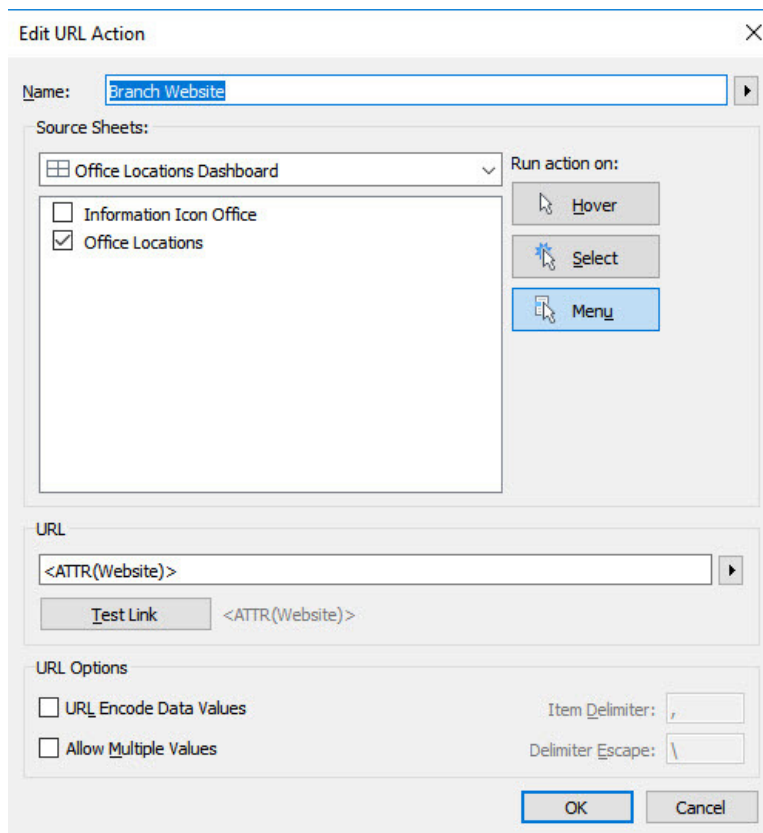
Connect sheets to external web resources using URL actions, or to other sheets in the same workbook using Filter actions and Highlight actions.

Name	Run On	Source	Fields

Show actions

-
-
-

The next step is to add a name for the URL. The naming of the hyperlink is pretty important, especially if you are going to use more than one action. In this example, the link will connect to the branches website so name it *Branch Website*. This is also the title that the end-user will see so make sure the title is clear. Next is to choose when to run this action. You will always have three options; hover, select, and menu. For this example, select *menu*. You will now enter the actual URL that you want the dashboard to be connected to. In the example, the website URL is included in the data source so it is as easy as clicking on the icon on the node to the right and select `<ATTR(Website)>`. This time the information was included in the data, but in order for it to be an option at this stage it needs to be part of the Tool Tip. If you don't want the website URL to show in the Tool Tip, just make sure to remove the checkmark "Include in Tool Tip" when creating the worksheet. The abbreviation ATTR tells you that it is part of the Tool Tip. You can always go into your browser and copy the URL and paste into the URL area within Tableau if the URL is not in the data source.



Edit URL Action

Name:

Source Sheets:

Information Icon Office

Office Locations

Run action on:

URL

<ATTR(Website)>

URL Options

URL Encode Data Values

Allow Multiple Values

Item Delimiter:

Delimiter Escape:

The next step is to go to the bottom left corner where it says objects and select *Webpage*. Drag-and-drop this option into the dashboard. When you first drop the container, a window will pop up that says *Edit URL*. If you want the end-user to land a specific webpage immediately, you can add an URL, but in this case just close the window. Play with it a little bit, decide where on the dashboard you want to show the webpage. Keep in mind that this is a webpage so you don't want to have it too small, but don't have it bigger than the graph in the dashboard. If this step is missed, when the action is clicked it will open in a separate browser window and not within Tableau. Now based on the settings we've selected, the end-user will have the option to view the office's website when they click on the location.

The screenshot shows a Tableau dashboard with a map of Los Angeles. A popup window is open over a location, displaying the following information:

- Address: 10931 W Pico Blvd
- City: Los Angeles
- State: CA
- Zip Code: 90064
- Branch Website
- Google Maps

Below the map is a navigation menu for RE/MAX Estate Properties. The menu includes the following items:

- WELCOME | REGISTER | LOGIN | OUR BLOG
- Search Homes
- Open Houses
- Communities
- Sell Your Home
- Offices
- Agents
- About/Contact

The main content area of the dashboard features a large image of a building tower with the text "Office Detail" overlaid. Below the image, the text "WEST LOS ANGELES" is visible.

options:

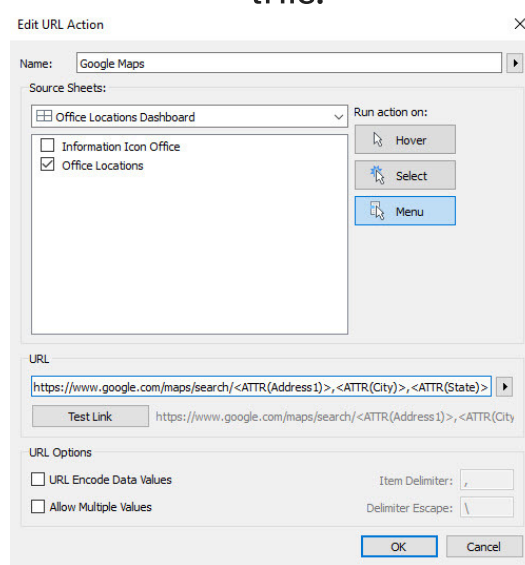
- Branch website - Takes you to the branch website
- Google Maps- Plot the branch on google maps

One thing you should always add is add some text with instructions. Always include instructions so they will know how to interact with the dashboard.

Click Remax logo for options:

- Branch website - Takes you to the branch website
- Google Maps- Plot the branch on google maps

That's all it takes to create a URL action! It's a pretty easy process, but what makes this action so awesome is its versatility! In this example, you'll notice a second link is available as well. This map was created with addresses using latitude and longitude. When the end-user hovers over the mark, they can see the address, city, state, and zip code of the office building. When the user clicks, they have the option of opening the location in Google Maps. This URL action was created the exact same way except the URL is different. The URL used in Tableau looks like this:



Edit URL Action

Name:

Source Sheets:

- Information Icon Office
- Office Locations

Run action on:

-
-
-

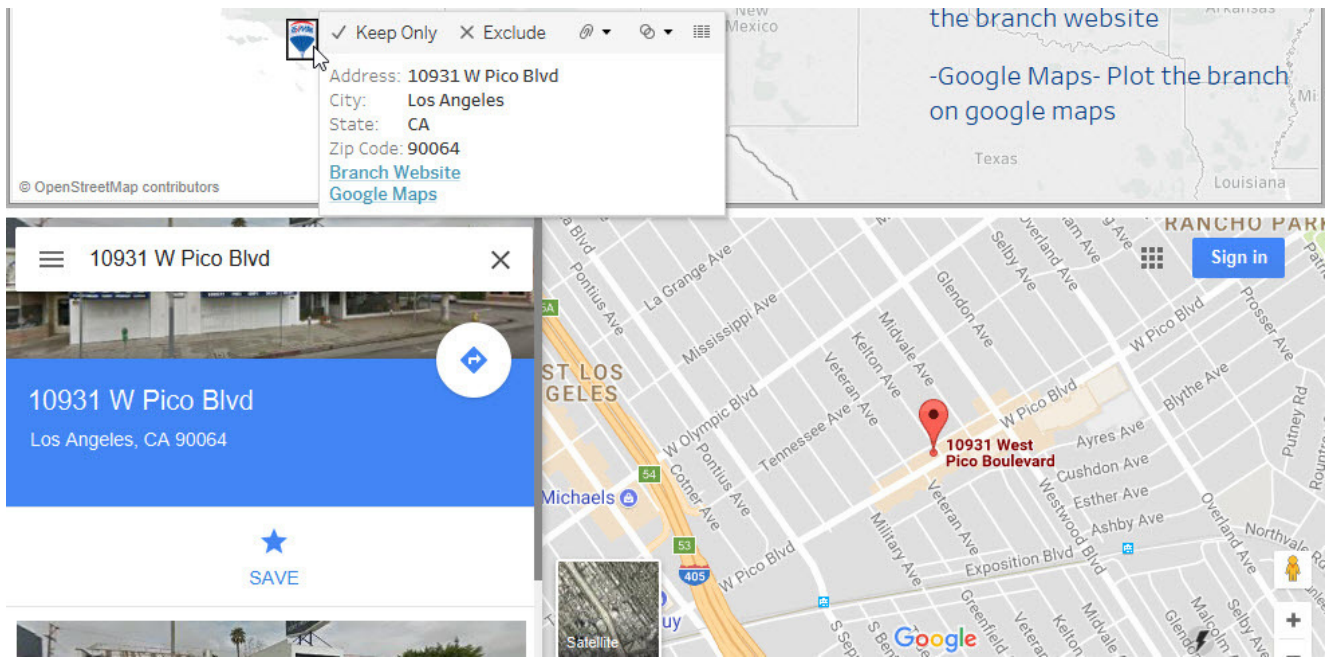
URL

https://www.google.com/maps/search/<ATTR(Address1)>,<ATTR(City)>

URL Options

- URL Encode Data Values
- Allow Multiple Values
- Item Delimiter:
- Delimiter Escape:

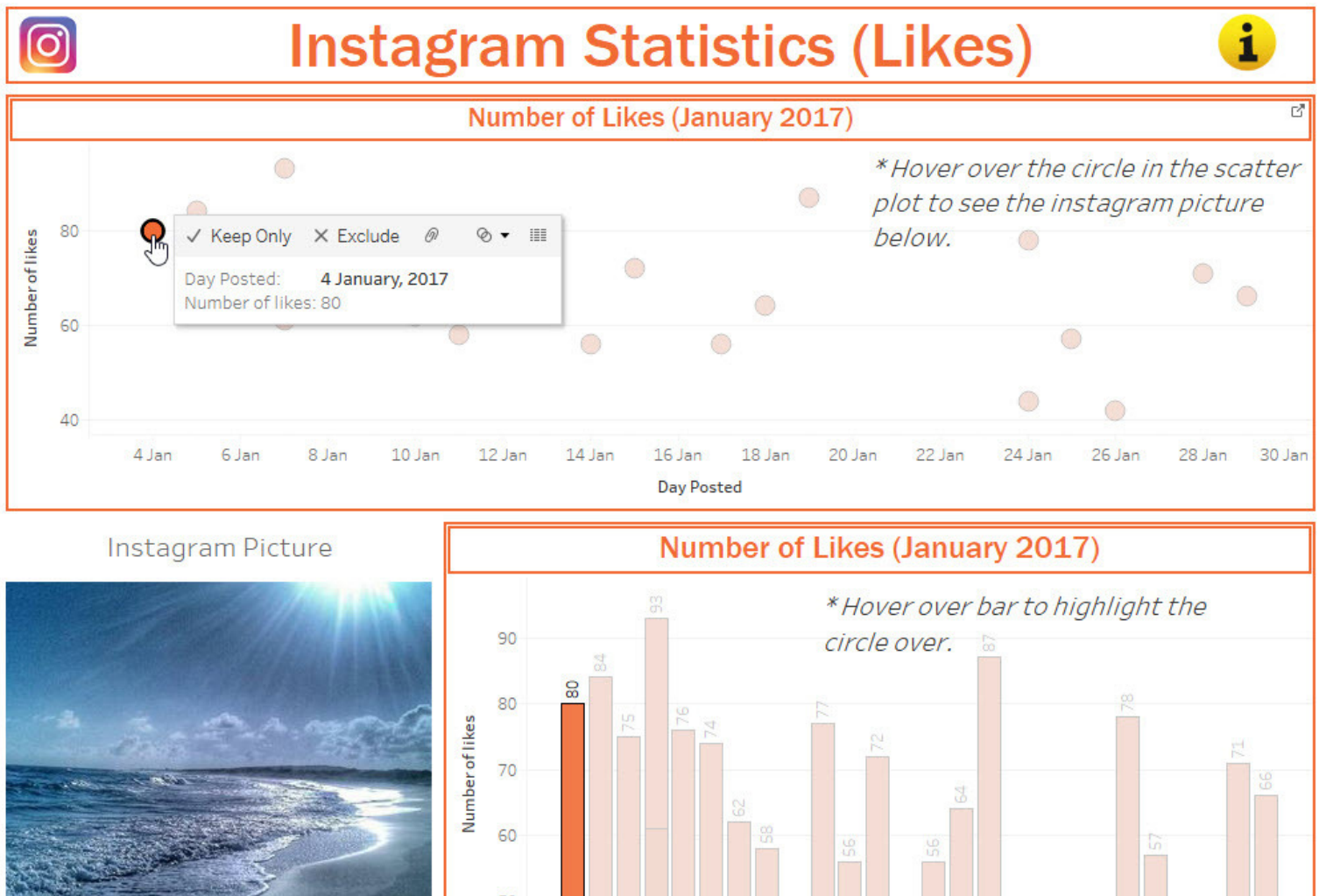
The first part of the URL always stays the same. In this case it's the Google Maps website, but what changes is the information that you tell Google to search for. All the information for this was available to us in the data source so make sure it is accessible via the Tool Tip the same way it was in the previous example. Simply click the node on the right and insert the *Address*, then *City* and then *State*. Always test the link! Make sure it is directing the user to the webpage you want.



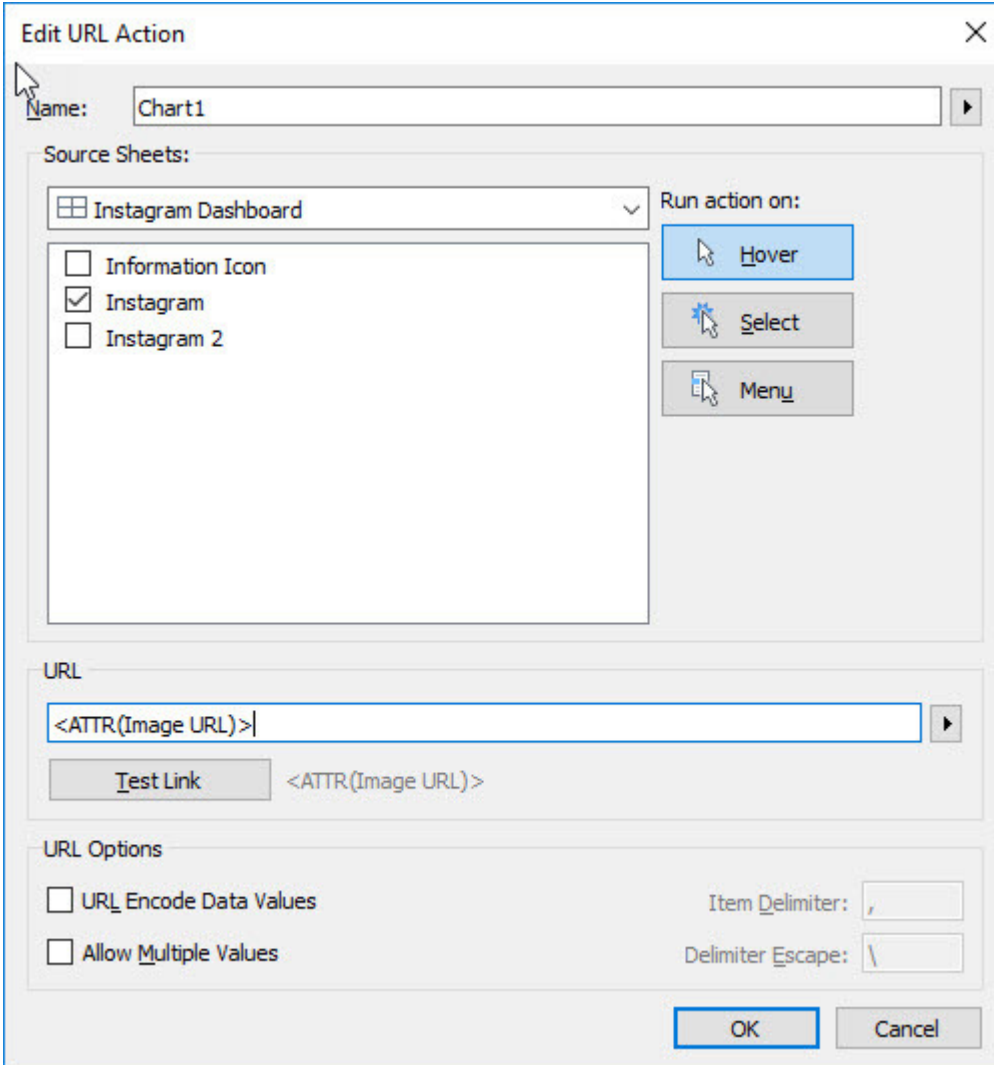
Now when they click it, the address will open in Google Maps in the webpage container. Something to note is that to embed Google Street View right into a dashboard is very tricky and advanced. However, there is a very easy workaround. When connecting to Google Maps the end user has functionality in Google Maps almost the same as they would in a normal web browser. They can simply drag the yellow icon on to the map and will be able to use Street View. Of course they can use Google Maps to get directions as well.

2) INSTAGRAM DASHBOARD

Overview: In this dashboard you are able to see date of which photos were posted in January 2017 and the number of likes each picture has received so far. As the end-user hovers over each mark in the scatter-plot or bar in the bar chart the corresponding mark or bar will be highlighted. Also, the end-user will be able to see the picture that was posted.



Instructions: This dashboard follows a very similar process. However, this dashboard uses two URL actions and two highlight actions. To create the first URL action, go to *Dashboard*, then *Actions*, and click *Add Actions* when the window opens up. Then select *URL*. Let's name this action *Chart1* as this will be the hover action in the first chart in the dashboard. This time there is more than one chart in the dashboard. Make sure that the correct chart is selected. In this case it is the chart that is named Instagram. Select *Hover*, then in the URL box, click the node and select `<ATTR(Image URL)>`. Same as before, the URL information was within the data source.



Edit URL Action

Name:

Source Sheets:

Information Icon

Instagram

Instagram 2

Run action on:

URL

<ATTR(Image URL)>

URL Options

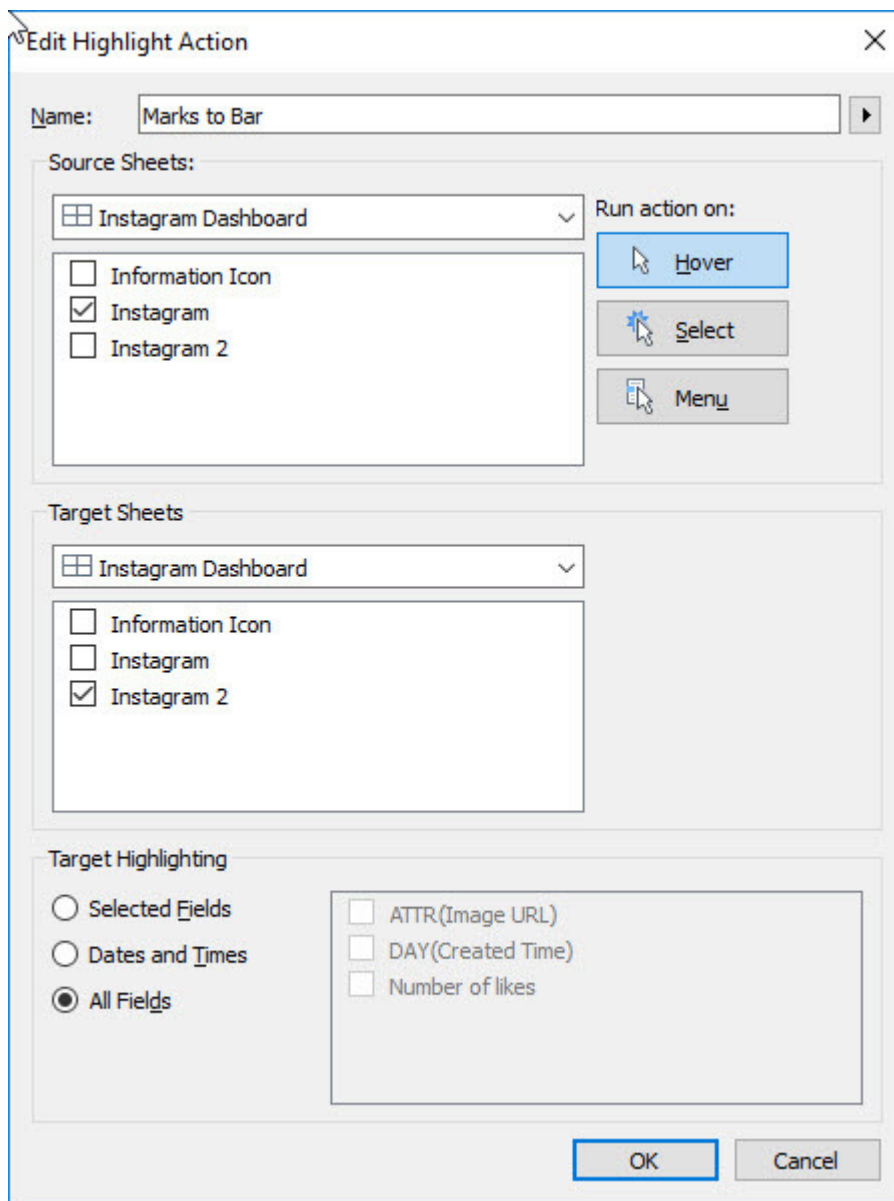
URL Encode Data Values

Allow Multiple Values

Item Delimiter:

Delimiter Escape:

For the bar chart, follow the same steps except *Instagram 2* will be your source sheet. Next you will need to add the two highlight actions. It's the same process up until you get to *Add Action*. Instead of choosing *URL*, select *Highlight*. Let's title this one *Marks to Bar* because this is the action where when the user hovers over a mark the corresponding bar in the bar chart will be highlighted. Here the source will be Instagram and the target sheet is *Instagram 2*. Choose *Hover* and then click Ok. Do the same process except it will be reverse; *Bars to Marks*.



Edit Highlight Action

Name:

Source Sheets:

Information Icon

Instagram

Instagram 2

Run action on:

Target Sheets

Information Icon

Instagram

Instagram 2

Target Highlighting

Selected Fields

Dates and Times

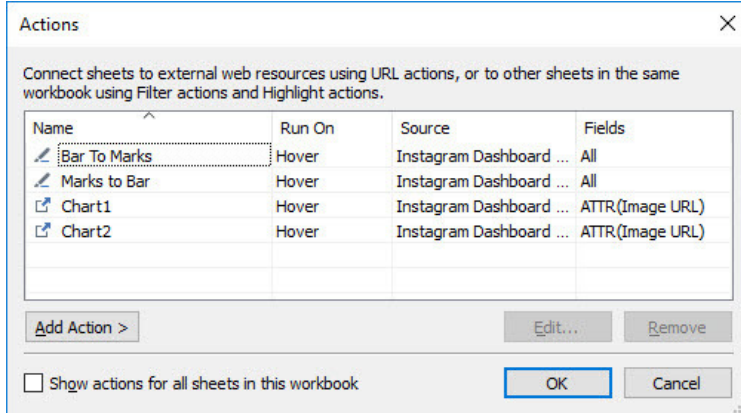
All Fields

ATTR(Image URL)

DAY(Created Time)

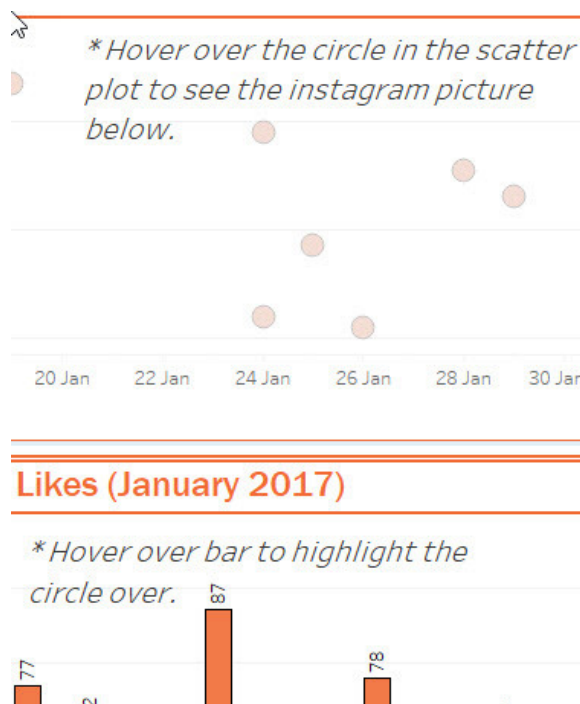
Number of likes

Now you should have a total of four actions.



Name	Run On	Source	Fields
Bar To Marks	Hover	Instagram Dashboard ...	All
Marks to Bar	Hover	Instagram Dashboard ...	All
Chart1	Hover	Instagram Dashboard ...	ATTR(Image URL)
Chart2	Hover	Instagram Dashboard ...	ATTR(Image URL)

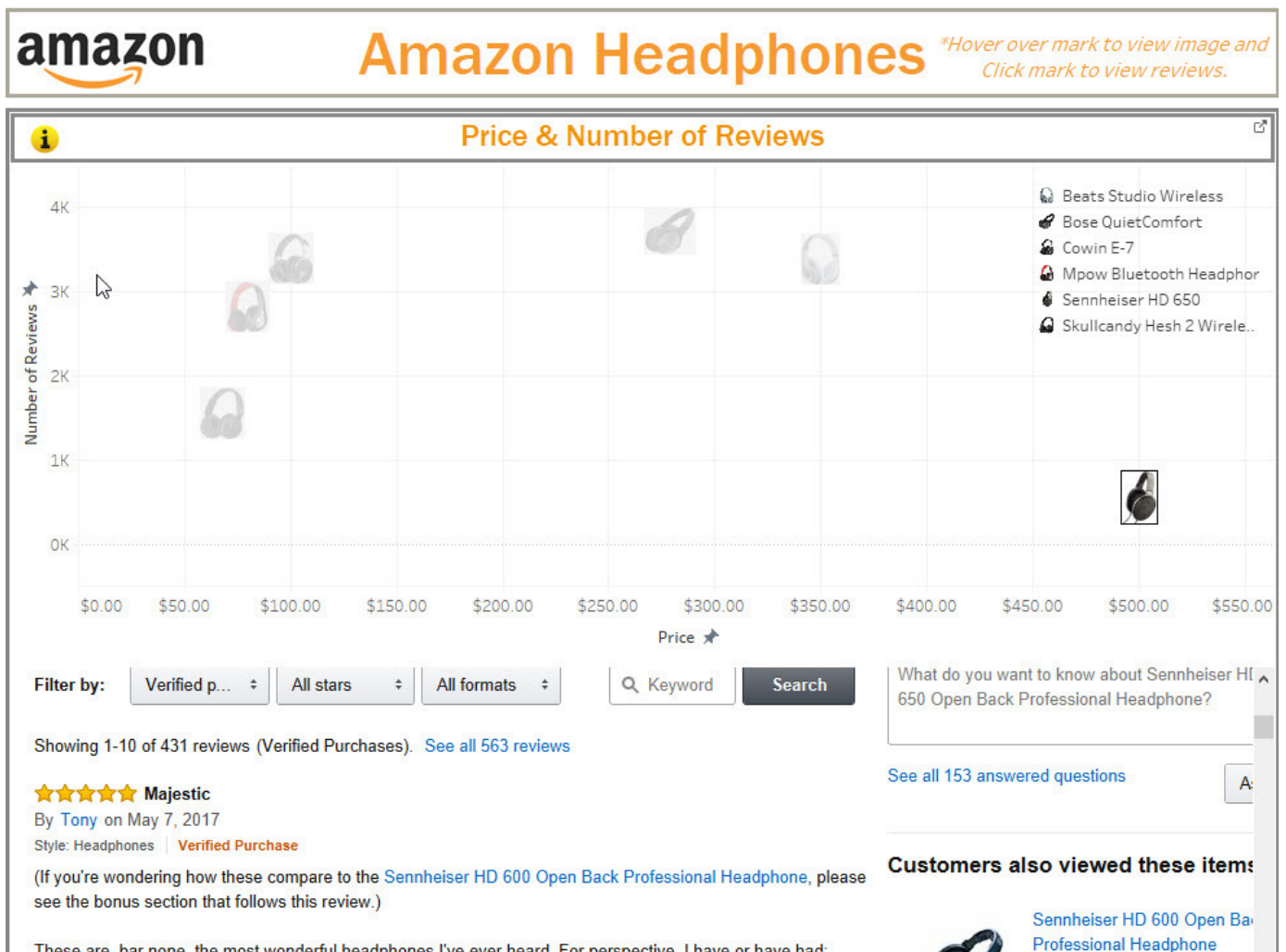
The last step is to drag-and-drop the webpage container into the dashboard. Make sure you test all the actions and add instructions!



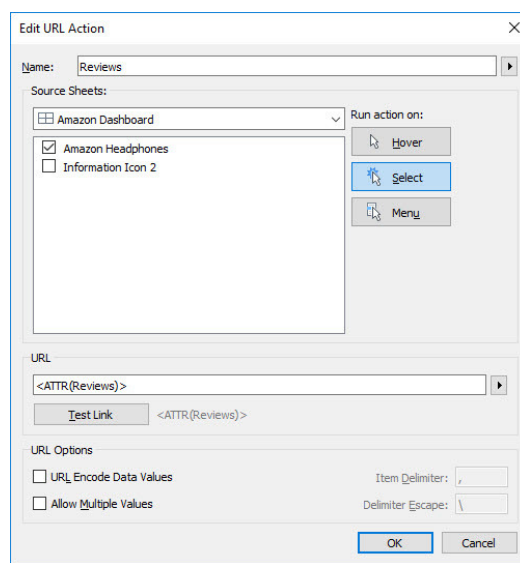
That's all it takes! You now have an interactive dashboard for Instagram Statistics!

3) AMAZON DASHBOARD

Overview: This dashboard shows information on different headphones that are available on Amazon, their price and number of reviews. By adding an URL action the end-user will be able to see the reviews right in the dashboard. This dashboard will use both hover and select URL actions. As the viewer hovers over a mark, an image of the headphones will show. Then if the viewer clicks on the mark, they will be taken to the Amazon page that holds all the different reviews!



Instructions: Just like the previous examples, go to *Dashboard, Actions, Add Action, and URL*. The first action to create is for when the user hovers over the mark, they will be able to see a larger image of the headphones in the webpage container. Name it *Image* and select *Amazon Headphones* as the Source Sheet. This action will be run on *Hover*. Click the node and select `<ATTR(Image)>`. The second action will take the user right to the Amazon that holds the reviews for that set of headphones. Follow the same steps, but this action will be run on *Select*.

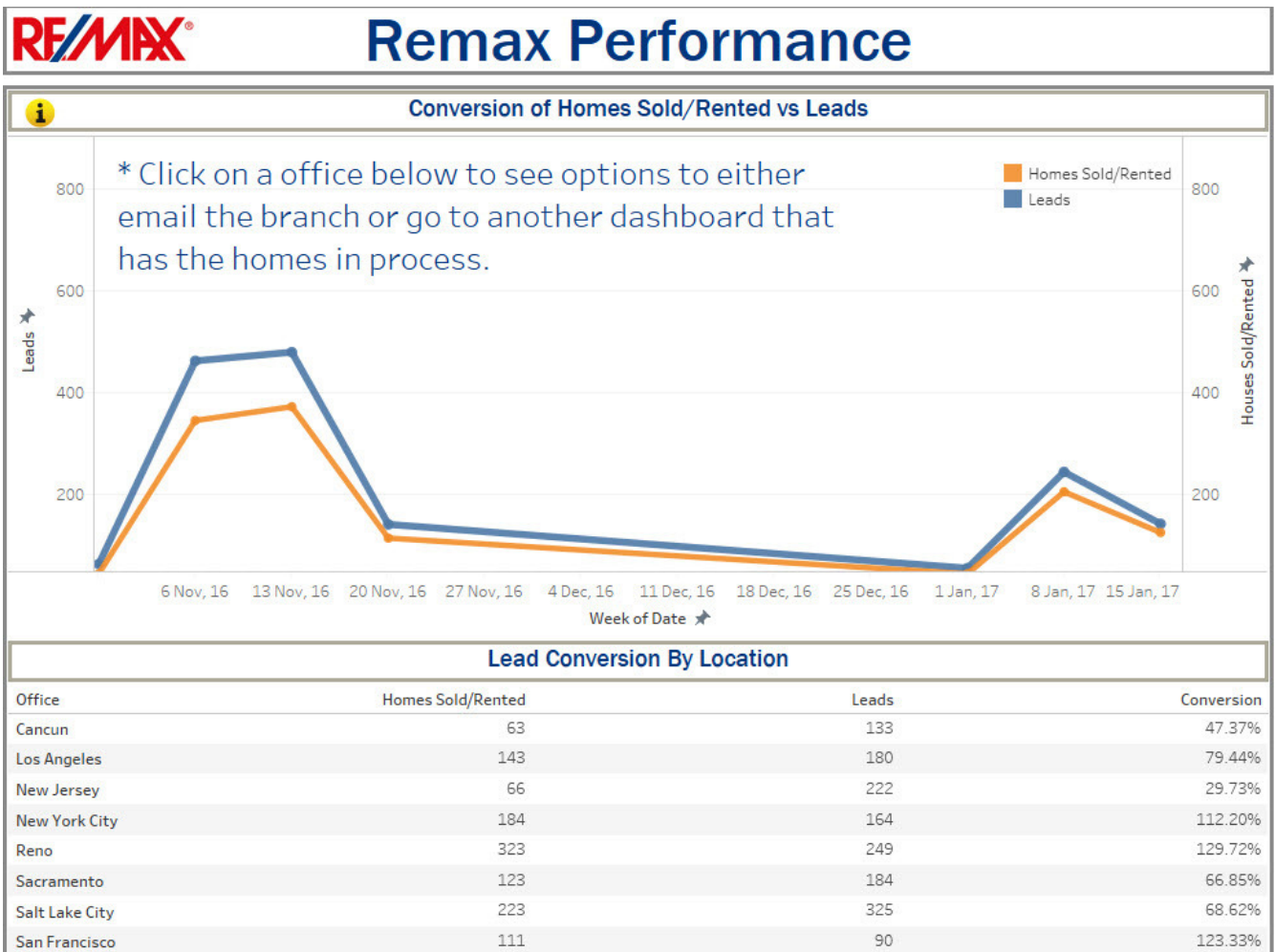


Now that the actions are set, simply drag-and-drop the webpage container into the dashboard and format it accordingly. Don't forget the instructions!



4) PERFORMANCE DASHBOARD

Overview: This dashboard contains a dual-axis chart that shows the number of homes that have been sold or rented against the number of leads. Below that is a chart that shows the offices' conversion. When the information is clicked in the bottom chart, the user will have two options; one is to send an e-mail to the branch manager or the other option is to jump to another dashboard that will show homes that are in process.



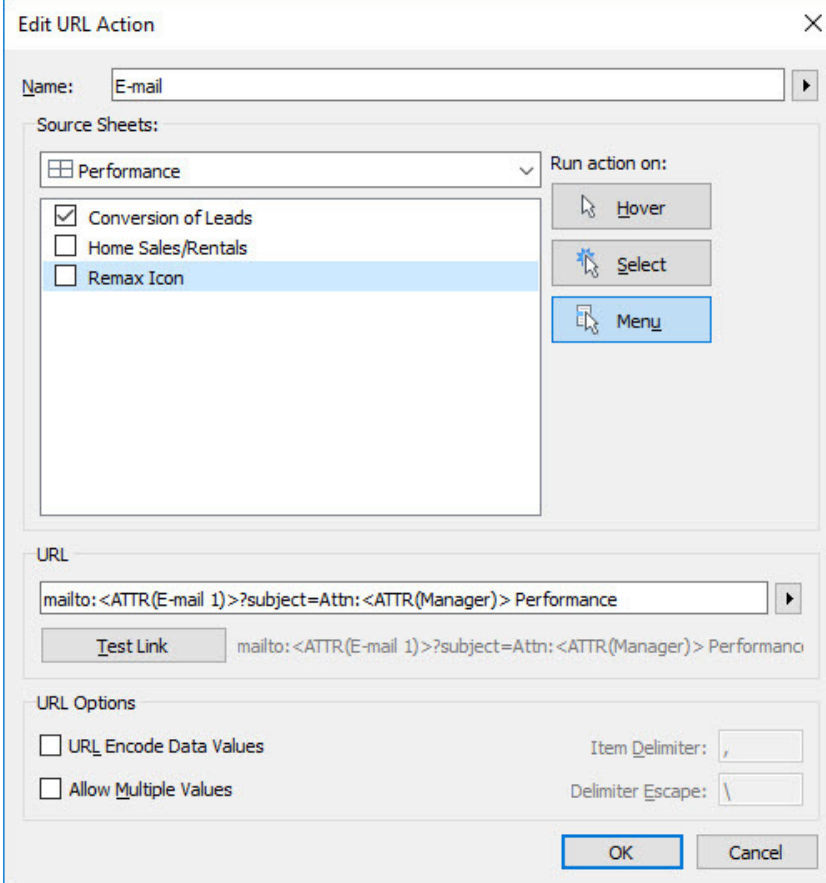
Instructions: To create the e-mail action, it starts the same as the others: *Dashboard, Actions, Add Action, URL*. Name this action *E-mail*. This action will be a *Menu* action. Some of the information can be pre-set by using the URL action code.

In this example, this is what they code looks like; **mailto:<ATTR(E-mail)>?subject=Attn:<ATTR(Manager)> Performance**. The code breaks down as follows; **mailto:** is the command that lets Tableau know that you would like to send an e-mail.

<ATTR(E-mail)> is part of the Tool Tip and is the command that will pull the e-mail address from the data source.

?subject= will automatically fill in the e-mail title for the user. You don't have to use this code for the URL action to work, but it is handy!

<ATTR(Manager)> will tell Tableau to automatically insert the managers name.



Edit URL Action

Name:

Source Sheets:

Performance

Conversion of Leads

Home Sales/Rentals

Remax Icon

Run action on:

URL

mailto:<ATTR(E-mail 1)>?subject=Attn:<ATTR(Manager)> Performanc

URL Options

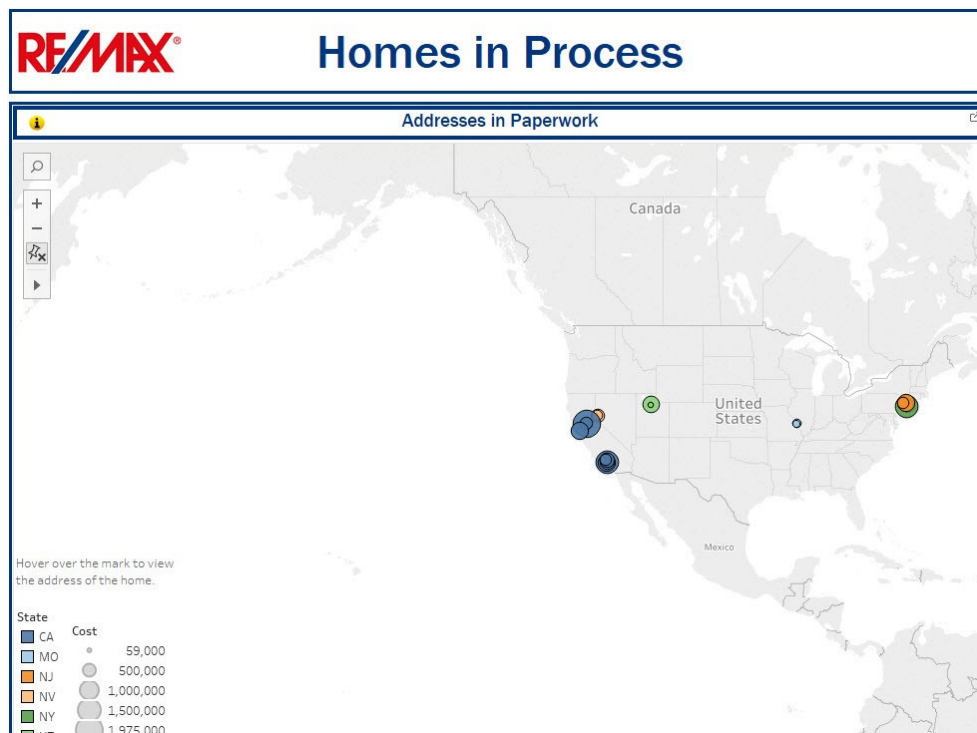
URL Encode Data Values

Allow Multiple Values

Item Delimiter:

Delimiter Escape:

So this URL action will open the end-users' default e-mail application on their computer and input the information that is included in the code. Pretty useful! Also, within the menu you will see a link to another dashboard. If this link is clicked, a new window will open with a dashboard called Homes in Process via Tableau Public. This link was added in the same manner however the URL wasn't in the data source so it was copied and pasted into the URL box.



As you can see, the URL actions in Tableau are quite versatile, but are very easy to put into a dashboard! They can allow a lot of interaction and makes things more efficient and can allow the end-user to smoothly navigate through the dashboard with access to all the information that they need. Of course, if you are creative, you can find even more scenarios in which you can insert an URL action!