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12 iCHARTS LLC

13 **UNITED STATES DISTRICT COURT**
14 **NORTHERN DISTRICT OF CALIFORNIA**
15 **SAN FRANCISCO DIVISION**

16 iCHARTS LLC,
17 Plaintiff,
18 v.
19 TABLEAU SOFTWARE, LLC,
20 Defendant.

Case No.: 3:24-cv-03157-WHA

**PLAINTIFF iCHARTS' FIRST
AMENDED ASSERTED CLAIMS,
INFRINGEMENT CONTENTIONS, AND
DOCUMENT PRODUCTION
DISCLOSURES (PATENT LOCAL
RULES 3-1, 3-2)**

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PLAINTIFF iCHARTS' FIRST AMENDED ASSERTED
CLAIMS, INFRINGEMENT CONTENTIONS,
AND DOCUMENT PRODUCTION DISCLOSURES (PLR 3-1, 3-2)

CASE No.: 3:24-cv-03157-WHA

1 In accordance with Northern District of California Patent Local Rule (“PLR”) 3-1, Plaintiff
2 iCharts LLC (“iCharts”) serves the following First Amended Disclosure of Asserted Claims and
3 Infringement Contentions, concerning U.S. Patent Nos. 8,271,892 (“’892 Patent”); 8,520,000
4 (“’000 Patent”); and 9,712,595 (“’595 Patent”) (collectively, the “Patents-in-Suit”), on Defendant
5 Tableau Software, LLC (“Tableau”).

6 **I. RESERVATION OF RIGHTS**

7 1. By providing these disclosures, iCharts does not represent that it has identified
8 every manner in which Tableau infringes the Patents-in-Suit. These infringement contentions
9 are based on public information available at the time of serving the infringement contentions and
10 support a reasonable, good faith belief that the claims of the Patents-in-Suit identified below are
11 infringed by Tableau. iCharts expects that discovery of source code, technical documents, and
12 other materials exclusively in Tableau’s possession, custody, and control will provide further
13 details of infringement, consistent with these contentions.

14 2. In providing these infringement contentions iCharts does not intend to convey or
15 imply any particular claim constructions or the precise scope of the claims. iCharts’ claim
16 construction contentions governing the scope of the claims will be provided later in compliance
17 with the Northern District of California Patent Local Rules and any schedule entered by the Court.
18 The final construction and scope of the claims for purposes of both infringement and validity will
19 ultimately be determined by the Court’s claim construction order.

20 3. The Parties have not yet identified proposed terms for construction or provided their
21 proposed constructions, and the Court has not yet made any claim construction ruling in this
22 action. iCharts has relied on the plain language of the claim terms for purposes of these
23 infringement contentions.

24 4. iCharts notes that while numerous documents are cited in its infringement
25 contentions, these documents are exemplary and intended for background information and to
26 assist Tableau in understanding iCharts’ present infringement theories. iCharts expressly reserves
27 the right to rely on additional or alternative documents to prove its case.

5. iCharts reserves all rights to amend, modify, and/or supplement its infringement contentions pursuant to PLR 3-6.

6. These disclosures are made subject to and without limiting any of the foregoing reservations.

II. DISCLOSURE OF ASSERTED CLAIMS AND INFRINGEMENT CONTENTIONS PURSUANT TO PLR 3-1

(a) Asserted Claims and Applicable Statutory Subsections of 35 U.S.C. §271.

As shown in Exhibits A through D, which are incorporated herein by reference, Tableau has directly infringed and is directly infringing the following claims under 35 U.S.C. §271(a), and/or has indirectly infringed the following claims under 35 U.S.C. §271(b): claims 1-3, 5-16 of the '892 Patent; claims 1, 3, 4 of the '000 Patent; and claims 1-12 of the '595 Patent (collectively, the "Asserted Claims"). Further, Tableau has indirectly infringed the following claims under 35 U.S.C. §271(c): claims 1-3 and 5-9 of the '892 Patent; and claims 1-6 of the '595 Patent.

(b) Accused Instrumentalities.

Based on information reasonably available to Plaintiff at this time, and in view of its present understanding of the scope of the Asserted Claims, iCharts identifies the following Accused Instrumentalities, referred to herein as the "Accused Products": i) Tableau Cloud (previously marketed as Tableau Online),¹ ii) Tableau Server, iii) Tableau Public, and iv) Tableau Desktop (when used in conjunction with Tableau Cloud, Tableau Server, or Tableau Public), all of which are and/or have been offered in connection with the Tableau Platform.

Publicly available information and iCharts' investigation indicates that Tableau Cloud (formerly marketed as Tableau Online), Tableau Public, Tableau Server, and Tableau Desktop infringe the Asserted Claims in substantially the same manner across all versions of the Tableau Platform released during the damages period starting 6 years prior to the filing of the Complaint. Thus, iCharts accuses each of the Accused Products that are part of each version of the Tableau Platform released throughout the entire damages period, which iCharts presently understands to

¹ iCharts understands that Tableau's renaming of Tableau Online to Tableau Cloud was purely a marketing decision, and that Tableau Cloud is the same product as Tableau Online.

1 be from version 10.4 through the present (version 2024.2).² iCharts further asserts that the
2 disclosures it has relied upon in Exhibits A through D apply equally to all versions of the Accused
3 Products released during the damages period, as the Accused Products (including all of their
4 versions) infringe the Patents-in-Suit in the same way throughout this time.

5 Tableau Cloud, Tableau Server, and Tableau Public infringe each asserted apparatus claim
6 (claims 1-3 and 5-9 of the '892 Patent and claims 1-6 of the '595 Patent). Each asserted method
7 claim (claims 10-16 of the '892 Patent, claims 7-12 of the '595 Patent, and claims 1, 3, and 4 of
8 the '000 Patent) is infringed when the software for Tableau Cloud, Tableau Server, and Tableau
9 Public is executed on a server. Tableau Desktop (when used in conjunction with Tableau Cloud,
10 Tableau Server, or Tableau Public) infringes claims 1-3, 5-9 of the '892 Patent.

11 As shown in Exhibits A through Corrected Exhibit C, Tableau has directly infringed and
12 is directly infringing the asserted apparatus claims under 35 U.S.C. § 271(a) through making and
13 using Tableau Cloud and Tableau Public on Tableau servers.³ Tableau is indirectly infringing the
14 asserted apparatus claims under § 271(b) by configuring Tableau Public, Tableau Cloud, and
15 Tableau Server to operate in a manner that Tableau knows will infringe the asserted apparatus
16 claims and by encouraging its customers to use Tableau Public, Tableau Cloud, and Tableau Server
17 in a manner that Tableau knows will infringe the asserted apparatus claims as described in Exhibits
18 A through Corrected Exhibit C.

19 Additionally, and/or in the alternative, Tableau has contributed and is contributing to the
20 infringement of the asserted apparatus claims under § 271(c) by its customers in the United States
21 because Tableau Cloud, Tableau Public, and Tableau Server software are a material part of each
22 asserted apparatus claim, have no substantial non-infringing uses, are not a staple article of

23 ² iCharts' present understanding of the versions of the Tableau Platform (including the Accused
24 Products) released during the damages period is from an unofficial blog written by a former
25 Tableau employee. <https://www.tableau.com/blog/analyzing-history-tableau-innovation>.
26 Tableau's official release documentation only goes back to 2019, whereas the damages period goes
27 back to 2017. <https://www.tableau.com/products/all-features>.

28 ³ iCharts is not aware of Tableau selling or providing physical servers to its customers. To the
extent that it does, Tableau directly infringes the asserted apparatus claims under 35 U.S.C.
§ 271(a) through offering to sell and selling Tableau Cloud, Tableau Public, and Tableau Server
in conjunction with physical servers.

1 commerce, and are specifically made and adapted for use in an infringing manner, as discussed in
2 Exhibits A through Corrected Exhibit C.

3 Additionally, as shown in Exhibits A through Corrected Exhibit C, Tableau is directly
4 infringing the asserted method claims by practicing each step of the method. Tableau is the direct
5 infringer when steps are carried out on Tableau's servers by Tableau Public or Tableau Cloud.

6 Additionally, Tableau has induced and is inducing the infringement of the method claims
7 under § 271(b) by configuring Tableau Server to operate in a manner that Tableau knows will
8 infringe the asserted method claims and by encouraging its customers to use Tableau Server in a
9 manner that Tableau knows will infringe the asserted method claims as described in Exhibits A
10 through Corrected Exhibit C. Tableau's customers are the direct infringer when steps are carried
11 out on Tableau's customers' servers by Tableau Server. Based on publicly available information,
12 customers purchase Tableau Server when the Tableau Platform resides on customer procured
13 servers and purchase Tableau Cloud when the Tableau Platform resides on Tableau's servers.⁴

14 Additionally, as shown in Exhibit D, Tableau has induced and is inducing the infringement
15 of claims 1-3, 5-9 of the '892 Patent under § 271(b) by configuring Tableau Desktop when used
16 in conjunction with Tableau Server or Tableau Cloud to operate in a manner that Tableau knows
17 will infringe the asserted apparatus claims and by encouraging its customers to use Tableau
18 Desktop in a manner that Tableau knows will infringe the asserted apparatus claims as described
19 in Exhibits D. Additionally, and/or in the alternative, Tableau has contributed and is contributing
20 to the infringement of claims 1-3, 5-9 of the '892 Patent under § 271(c) by its customers in the
21 United States because Tableau Desktop, when used in connection with Tableau Cloud, Tableau
22 Public, and Tableau Server software, are a material part of each asserted apparatus claim, have no
23
24

25 ⁴ iCharts is not aware of Tableau's customers using Tableau Server in conjunction with Tableau's
26 use of Tableau Cloud or Tableau Public to perform other steps of the asserted method claims.
27 Thus, iCharts reserves the right to assert direct infringement of the asserted method claims based
28 on the joint acts of multiple parties if iCharts learns through discovery that Tableau's customers
do use Tableau Server in conjunction with Tableau's use of Tableau Cloud or Tableau Public in
an infringing manner.

substantial non-infringing uses, are not a staple article of commerce, and are specifically made and adapted for use in an infringing manner, as discussed in Exhibit D.

As for infringement under § 271(b) and (c), Tableau has known of the Patents-in-Suit and its infringement at least as early as 2017, as set forth in more detail below.

iCharts expressly reserves the right to identify additional accused products if it learns through discovery or otherwise that additional instrumentalities infringe the Asserted Claims.

(c) Claim Charts.

Exemplary claim charts showing how the identified Accused Products meet each element of the Asserted Claims are attached hereto as **Exhibit A** ('892 Patent for Tableau Server, Tableau Public, Tableau Cloud), **Exhibit B** ('595 Patent for Tableau Server, Tableau Public, Tableau Cloud), **Corrected Exhibit C** ('000 Patent for Tableau Server, Tableau Public, Tableau Cloud), and **Exhibit D** ('892 Patent for Tableau Desktop when used in conjunction with Tableau Server, Tableau Public, Tableau Cloud).

Specifically, Exhibits A through Corrected Exhibit C are claim charts mapping Tableau Server, Tableau Public, Tableau Cloud to each claim limitation of each Asserted Claim of the Patents-in-Suit. Based on publicly available information, Tableau Cloud, Tableau Public, and Tableau Server operate in substantially the same way when carrying out the functions that are accused of infringement, such as allowing users to create and publish interactive charts. Tableau's user guides cited within the claim charts expressly state that the user guides apply equally to Tableau Cloud and Tableau Server. Specifically, Tableau Server operates substantially the same as Tableau Cloud, but Tableau Server is located on a server that is either on-site at Tableau's customer's location or on a public server cluster procured by Tableau's customer. Tableau's documentation explains that the difference between Tableau Cloud and Tableau Server is a deployment choice. Thus, there is no architectural or functionality difference. See, e.g., <https://www.tableau.com/products/our-platform>; <https://community.tableau.com/s/news/a0A4T000002fQt1UAE/tableau-cloud-vs-tableau-server-a-guide-on-how-to-compare-server-and-cloud>.

1 Further, Tableau Public is a basic version of Tableau Cloud and, based on publicly
2 available information, operates in substantially the same way when carrying out the functions that
3 are accused of infringement, such as allowing users to create and publish interactive charts. See
4 <https://www.tableau.com/products/public>.

5 Because Tableau Cloud, Tableau Public, and Tableau Server operate in substantially the
6 same way when carrying out the functions that are accused of infringement, disclosures relating to
7 one product are equally applicable to the other products and provide notice of how the features of
8 each product are infringing. For example, Tableau Public is readily available and screenshots
9 related to the functionality of Tableau Public are included in the claim charts. These Tableau Public
10 disclosures are illustrative and/or representative of the structure and architecture of all Accused
11 Products.

12 Exhibit D is a claim chart mapping Tableau Desktop when used in conjunction with
13 Tableau Server or Tableau Cloud to each limitation of claims 1-3, 5-9 of the '892 Patent. Tableau
14 Desktop operates in substantially the same way as Tableau Public, Tableau Cloud, and Tableau
15 Server when carrying out the functions that are accused of infringement. Tableau's user guides
16 cited within the claim charts expressly state that the user guides apply equally to Tableau Cloud,
17 Tableau Server, and Tableau Desktop. The Desktop user interface (UI) is substantially similar in
18 the functionality and look and feel to the browser-based user interfaces of Tableau Server and
19 Tableau Cloud. Further Desktop UI can connect with external databases, and can publish charts
20 using Tableau Server, Tableau Cloud, or Tableau Public. Thus, disclosures relating to Tableau
21 Server and Tableau Cloud cited in the claim charts are equally applicable to Tableau Desktop and
22 provide notice of how the features of Tableau Desktop are infringing. For example, Tableau Public
23 is readily available and screenshots related to the functionality of Tableau Public are included in
24 the claim charts. These Tableau Public disclosures are illustrative and/or representative of the
25 structure and architecture of all Accused Products, including Tableau Desktop.

iCharts reserves the right to revise, amend, or supplement these disclosures, including the attached claim charts, after Tableau provides discovery, after receiving Tableau's claim constructions, and as otherwise allowed under the Court's standing orders or PLRs.

(d) Indirect Infringement.

As described above, Tableau indirectly infringes the Asserted Claims of the Patents-in-Suit under 35 U.S.C. §§ 271(b) and (c). Tableau induces the direct infringement of the Patents-in-Suit by its customers in the United States under 35 U.S.C. § 271(b) by encouraging customers to deploy and use Tableau Server and Tableau Desktop as instructed, described, and encouraged in the various user help guides cited herein, including those documents cited in Exhibits A-D, which Tableau knows infringe the Patents-in-Suit. Based on iCharts' present understanding, direct infringement is not based on joint acts of multiple parties.

Tableau has had knowledge of the Patents-in-Suit since at least 2017, and Tableau knew or should have known that the use of the Accused Products by its customers directly infringes the Patents-in-Suit.

Further, Tableau contributes to the infringement of the Patents-in-Suit by its customers in the United States, as discussed above, under 35 U.S.C. § 271(c). To the extent that infringement requires additional components to the Accused Products, Tableau sells and offers to sell Tableau Server, Tableau Cloud, Tableau Public, and Tableau Desktop which are a material part of the asserted apparatus claims, have no substantial non-infringing uses, are not staple articles of commerce, and/or are specifically made and adapted for use in an infringing manner, as discussed in Exhibits A-D. For example, Tableau offers Tableau Server and Tableau Desktop software that is run on processors provided by Tableau's customers.

(e) Literal Infringement or Doctrine of Equivalents.

As set forth in Exhibits A through D hereto, iCharts contends that each element of each asserted claim is literally present in the Accused Products.

1 **(f) Priority Date.**

2 The “priority date” is the filing date of the earliest patent application to which an Asserted
3 Claim of the Patents-in-Suit is entitled (as opposed to the “invention date,” which is the date when
4 the inventor(s) conceived the invention and then reduced it to practice). The Patents-in-Suit
5 priority dates are as follows:

6 '892 Patent: Each and every Asserted Claim of the '892 Patent has a priority date of July
7 2, 2008. The '892 Patent claims priority to Provisional application 61/077,728, filed on July 2,
8 2008 (the '728 Provisional).

9 '000 Patent: Each and every Asserted Claim of the '000 Patent has a priority date of
10 February 17, 2009. The patent application for the '000 Patent was filed on February 17, 2009,
11 which is a continuation-in-part application of the '892 Patent, which claims priority to the '728
12 Provisional, filed on July 2, 2008.

13 '595 Patent: Each and every Asserted Claim of the '595 Patent has a priority date of
14 February 17, 2009. The '595 Patent claims the priority benefit of U.S. patent application Ser. No.
15 13/962, 236 filed Aug. 8, 2013, which is a continuation of and claims the priority benefit of the
16 '000 Patent, filed on February 17, 2009, which is a continuation-in-part and claims the priority
17 benefit of the '892 Patent, which claims the priority benefit of the '728 Provisional, filed on July
18 2, 2008.

19 **(g) iCharts' Products.**

20 The prior assignee of the Patents-in-Suit, iCharts Inc., offered subscriptions and services
21 at icharts.com that embody each of the asserted apparatus claims and/or practice the methods of
22 each of the asserted method claims.

23 **(h) Damages Period.**

24 iCharts does not have sufficient information to identify the timing of Tableau's first
25 infringement. However, based upon iCharts' present information and belief, subject to discovery
26 from Tableau which will provide the necessary evidence in Tableau's possession, the timing of
27 the point of first infringement by Tableau and/or its customers is between the issuance date of each
28

Patent-in-Suit and the beginning of the damages period. The damages period for which damages may be recovered is from October 10, 2017 through at least the present. Tableau's infringement is ongoing.

(i) Willful Infringement.

Tableau has been on notice of the Patents-In-Suit since at least as early as 2017. In 2017, iCharts, Inc. (prior assignee of the Patents-in-Suit) and Tableau discussed Tableau's potential acquisition of iCharts, Inc., during which discussions iCharts, Inc. made Tableau aware of iCharts, Inc.'s patent portfolio including the Patents-in-Suit. On information and belief, pursuant to Tableau's due diligence and investigation of the Patents-In-Suit, Tableau was made aware and understood that Tableau Public, Tableau Cloud, Tableau Server, and Tableau Desktop infringe the Patents-in-Suit. Despite this knowledge, Tableau chose not to acquire iCharts or buy or license the Patents-in-Suit, and continued to make, sell, and offer to sell the Accused Products, and encourage its customers to use the Accused Products, in a deliberate and/or intentional infringing manner, constituting willful infringement. Alternatively, at a minimum, Tableau's actions amount to willful blindness because Tableau subjectively believed that there was a high probability that it infringed and infringes the Patents-in-Suit, and took deliberate action to avoid learning that it did. Tableau was aware of iCharts, Inc.'s patent portfolio, including the Patents-In-Suit, and Tableau was aware that iCharts, Inc. was a competitor with similar subscriptions and services offerings (an iCharts Inc. representative explained how iCharts Inc.'s subscriptions and services offerings worked) that were covered by iCharts, Inc.'s patents. Other facts evidencing willfulness may be learned during the discovery process.

III. DOCUMENT PRODUCTION ACCOMPANYING DISCLOSURE PURSUANT TO PLR 3-2

iCharts is producing concurrently herewith the following documents:

- a. Documents sufficient to evidence each discussion with, disclosure to, or other manner of providing to a third party or sale of or offer to sell, or any public use of, the claimed invention prior to the date of application for each Patent-in-Suit: ICHARTS0001780 - ICHARTS0001821.

- 1 b. Documents evidencing the conception, reduction to practice, design, and
2 development of each claimed invention, which were created on or before the
3 date of application for each Patent-in-Suit or the priority date identified
4 pursuant to PLR 3-1(f), whichever is earlier: ICHARTS0001833 -
5 ICHARTS0008115.
- 6 c. File histories: ICHARTS0000001– ICHARTS0001053.
- 7 d. Documents evidencing ownership of the Patents-in-Suit: ICHARTS0001054–
8 ICHARTS0001103.
- 9 e. Documents sufficient to show the operation of instrumentalities embodying any
10 asserted claims: ICHARTS0001104 - ICHARTS0001779. Additionally,
11 relevant source code is and will be available for inspection on mutually
12 agreeable dates and locations.
- 13 f. Agreements transferring any interest in any Patent-In-Suit:
14 ICHARTS0001054–ICHARTS0001103.
- 15 g. Agreements related to accused instrumentalities or may be comparable to a
16 license in a hypothetical negotiation: iCharts has not presently identified
17 licenses that it contends to be comparable but will supplement if and when it
18 becomes aware of any such agreement, and has produced agreements relating
19 to the prior assignee's products: ICHARTS0008116 - ICHARTS0008681.
- 20 h. Agreements that may be used to support iCharts' damages case: iCharts has
21 produced agreements relating to the prior assignee's products, and will
22 supplement if and when it becomes aware of additional responsive agreements:
23 ICHARTS0008116 - ICHARTS0008681.
- 24 i. Marking of instrumentalities disclosed under PLR 3-1(g): ICHARTS0001104 -
25 ICHARTS0001779.
- 26 j. F/RAND: N/A
- 27
- 28

Respectfully submitted,

Date: August 1, 2024

By: Fabio E. Marino

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iCHARTS LLC

1 **PROOF OF SERVICE**

2 I am employed in the County of Santa Clara, State of California. I am over the age of
3 eighteen years and not a party to the within action. My business address is Womble Bond
4 Dickinson (US) LLP, 1279 Oakmead Parkway, Sunnyvale, CA 94085. I am readily familiar with
5 Womble Bond Dickinson (US) LLP's practice for collection and processing of documents for
6 delivery by way of service indicated below:

7 On August 1, 2024, I caused to be served the following document(s):

8 **PLAINTIFF iCHARTS' FIRST AMENDED ASSERTED CLAIMS, INFRINGEMENT**
9 **CONTENTIONS, AND DOCUMENT PRODUCTION DISCLOSURES + EXHIBITS A-D**
10 on the interested parties in this action as follows:

11 **SEE SERVICE LIST**

12
13 ☒ **BY E-MAIL OR ELECTRONIC TRANSMISSION:** I caused a copy of the
14 document(s) to be sent from e-mail address Marilyn.Ortiz@wbd-us.com to the persons at the e-
15 mail addresses listed in the Service List. I did not receive, within a reasonable time after the
16 transmission, any electronic message or other indication that the transmission was unsuccessful.

17 I declare under penalty of perjury under the laws of the State of California that the
18 foregoing is true and correct.

19 Executed on August 1, 2024, at San Jose, California.

20 /s/ Marilyn Ortiz
21 Marilyn Ortiz
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Attorneys for Defendant
Tableau Software, LLC

Exhibit B

U.S. Patent No. 9,712,595
“Creation, sharing and embedding of interactive charts”

Claim	Accused Product – Tableau Cloud, Tableau Public, Tableau Server (referred to collectively as Tableau Accused Products)
1 [pre]. A system for creating interactive charts, the system comprising:	<p><i>Tableau directly infringe this claim as set forth below because Tableau makes, uses, and maintains a computer system (e.g., Tableau Cloud, Tableau Public) for creating interactive charts, as described below.</i></p> <p><i>Additionally and/or alternatively, Tableau has induced and is inducing its customers to directly infringe by encouraging its customers to use the Tableau Platform (e.g., Tableau Server, Tableau Public, Tableau Cloud) in an infringing manner, as set forth below.</i></p> <p><i>Additionally, and/or in the alternative, Tableau has contributed and is contributing to the infringement of this claim by its customers because the Tableau Platform (e.g., Tableau Server, Tableau Cloud, Tableau Public) is a material part of the claimed system as set forth below, has no substantial non-infringing uses, is not a staple article of commerce, and is specifically made and adapted for use in an infringing manner.</i></p> <p><i>For example, Tableau makes and maintains the Tableau Platform, an analytics platform consisting of Tableau servers and Tableau software. The Tableau Platform includes Desktop, Web Browser & Mobile user-interfaces (UIs), data management components, and back-end components of Tableau Cloud (formerly Tableau Online), Tableau Public (a free version of Tableau Cloud), Tableau Server (public cloud or on-prem), and Tableau Desktop.</i></p> <p>Tableau Platform: https://www.tableau.com/products/our-platform</p> <p>Tableau is the broadest and deepest, end-to-end data and analytics platform. Ensure the responsible use of data and drive better business outcomes with fully-integrated data management and governance, visual analytics and data storytelling, and collaboration...</p> <p>Tableau Platform:</p>

Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”



Tableau Platform:

https://help.tableau.com/current/tableau/en-us/tableau_product_overview.htm?_gl=1*21x1xx*_ga*ODA0NDczNDYyLjE3MDY1NzlyNDI.*_ga_8YLN0SNXVS*MTcxNTYxNTk4MC40MC4xLjE3MTU2MTg1MjkuMC4wLjA.

Tableau Product Overview

Tableau is a complete, flexible analytics platform for harmonizing, managing, and exploring data with interactive visualizations. You can combine and manage data from multiple sources...in the Tableau platform.

Tableau Products



Tableau Cloud

[Tableau Cloud Help](#)

(Link opens in a new window)

[Tableau Web Authoring Help](#)

A fully hosted cloud-based enterprise-grade analytics platform for creating or hosting visualizations, data sources, and flows.

Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

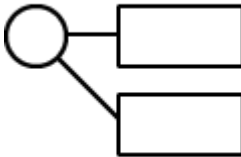
		(Link opens in a new window)	
		<p>Tableau Prep</p> <p>Tableau Prep Help</p> <p>(Link opens in a new window)</p>	Prepare data for analysis in Tableau, such as combining, shaping, and cleaning data.
		<p>Tableau Desktop</p> <p>Tableau Desktop Help</p> <p>(Link opens in a new window)</p>	Provides everything you need to access, visualize, and analyze your data. With an intuitive interface, you can uncover hidden insights and make smart decisions faster.
		<p>Tableau Server</p> <p>Tableau Server Administrator Help:</p> <p>On Linux</p> <p>(Link opens in a new window)</p> <p>On Windows</p> <p>(Link opens in a new window)</p>	A self-hosted platform, either on-premises or in a public cloud, for creating or hosting visualizations, data sources, or flows. Tableau Server can have multiple sites.

Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

	<div><p>Tableau Mobile</p><p>Tableau Mobile Overview</p><p>(Link opens in a new window)</p></div> <div><p>Tableau Public</p><p>(Link opens in a new window)</p></div> <p>Tableau Desktop and Web Authoring Help: https://help.tableau.com/current/pro/desktop/en-us/default.htm</p>
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Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

Tableau Desktop and Web Authoring Help

Applies to: Tableau Cloud, Tableau Desktop, Tableau Server



Get Started

- [Release notes](#)
- [Build a basic view](#)
- [Tutorial: Get started with Tableau Desktop](#)
- [Choose the right chart type for your data](#)
- [Workbook performance checklist](#)

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Connect and Prepare Data

- [Connect to your data](#)
- [Plan your data source](#)
- [Tips for working with your data](#)
- [Relate your data](#)
- [Customize fields in the Data pane](#)

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Use Tableau on the Web

- [Authoring on the web vs. desktop](#)
- [Get started with web authoring](#)
- [Tour your Tableau site](#)
- [Send data-driven alerts](#)
- [Use custom views](#)

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Build Visualizations

- [Build views from scratch](#)
- [Customize data fields in the Data pane](#)
- [Add visual detail](#)
- [Add interactivity using actions](#)

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Explore and Find Insights

- [Explore and inspect data in a view](#)
- [Automatically build views with Ask Data](#)
- [Inspect a view with Explain Data](#)
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Analyze Your Data

- [Create custom fields using calculations](#)
- [Use functions](#)
- [Spot trends](#)
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Maps and Geographics Data

- [Get started with mapping](#)
- [Build a simple map](#)
- [Mapping concepts](#)
- [Customize map appearance](#)

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Present Dashboards and Stories

- [Format your work](#)
- [Create dashboards](#)
- [Visual best practices](#)
- [Create stories](#)

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Publish, Share, and Collaborate

- [Publish data sources and workbooks](#)
- [Save and export](#)
- [Share web views](#)
- [Data-driven alerts](#)

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DID THIS ARTICLE SOLVE YOUR ISSUE?
Let us know so we can improve!

Yes 

No 

5

Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

Tableau Cloud: <http://www.tableau.com/products/cloud-bi>

Share and collaborate in the cloud

Tableau Cloud is the new Tableau Online. Experience a fully-hosted, cloud-based, enterprise-grade solution on the world's #1 analytics platform. As a fast, flexible, easy-to-use self-service platform designed to fit your enterprise architecture, it streamlines the power of data to make people faster and more confident decision makers from anywhere. Prepare your data, author, analyze, collaborate, publish, and share in Tableau Cloud.

Tableau Online is your **analytics platform fully hosted in the cloud**. Publish dashboards and share your discoveries with anyone. Invite colleagues or customers to explore hidden opportunities with interactive visualizations and accurate data. **All easily accessible from a browser or on the go with our mobile apps.**

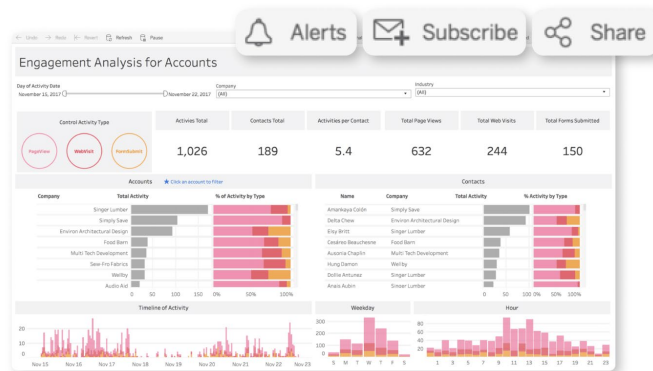


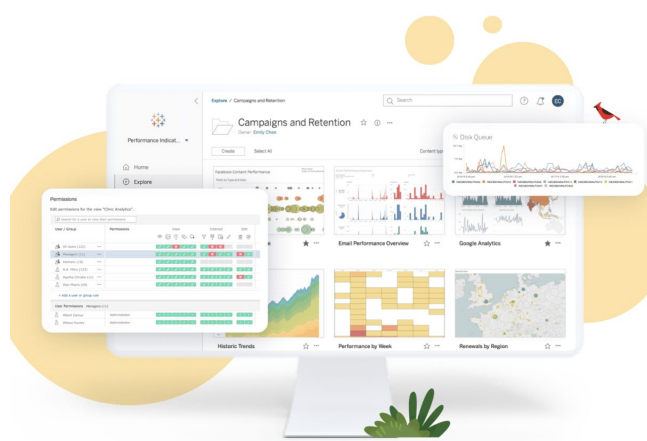
Tableau Server: <http://www.tableau.com/products/server>

Governed self-service analytics at scale with **Tableau Server** [...]

Extend the value of your data across your entire organization with Tableau Server. Empower your business with the freedom to explore data in a trusted environment—without limiting them to predefined questions, wizards, or chart types. Have the peace of mind that both your data and your analytics are governed, secure, and accurate.

Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”



Deploy with unmatched flexibility

Deeply integrate with your enterprise architecture to leverage technology investments. Choose from on-premises or public cloud and configure servers, manage software upgrades, or scale hardware capacity according to your requirements. Connect to any data and turbocharge teamwork by discovering, sharing, collaborating, and exploring data from your mobile device, tablet, or computer.



Whether you're keeping your data on-premises or in the cloud, Tableau Server gives you the flexibility to integrate into your existing data infrastructure. **Install Tableau Server on-premises**, on either Windows or Linux, for ultimate control behind your firewall. **Deploy on Public Cloud** with AWS, Azure or Google Cloud Platform to leverage your existing cloud investment.

Tableau Cloud, Server, Or Desktop Example:

Tableau Help > Tableau Desktop and Web Authoring Help > Build Charts and Analyze Data > Build Data Views From Scratch > Start Building a Viz by Dragging Fields to the View > Use Show Me to Start a View

https://help.tableau.com/current/pro/desktop/en-us/buildmanual_dragging.htm

Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

	<p><u>Start Building a Visualization by Dragging Fields to the View</u></p> <p><i>Applies to: Tableau Cloud, Tableau Desktop, Tableau Server</i></p> <p>Then click on “Use Show Me to Start a View”: https://help.tableau.com/current/pro/desktop/en-us/buildauto_showme.htm</p> <p><i>Tableau Public is one example of the computer system that Tableau makes and maintains as part of the Tableau Platform. Tableau Public is a basic version of Tableau Cloud. Tableau Public and Tableau Cloud operate in substantially the same way in allowing users to create and publish interactive charts.</i></p> <p><i>Tableau Public allows users to create an interactive chart, using a data module and template module, that is shareable and embeddable.</i></p> <p>https://www.tableau.com/products/public</p> <p><i>Tableau Public is a free platform to explore, create and publicly share data visualizations online. With the largest repository of data visualizations in the world to learn from, Tableau Public makes developing data skills easy. Advance your career in analytics by learning from limitless data inspiration and creating an online portfolio of work.</i></p> <p>✓</p> <p>Share publicly A platform for public (not private) data. Published visualizations are available for anyone to see online.</p> <p>✓</p> <p>Free with few limits Explore and contribute to the millions of visualizations on Tableau Public. Data refresh is limited.</p> <p>✓</p> <p>Fully hosted</p>
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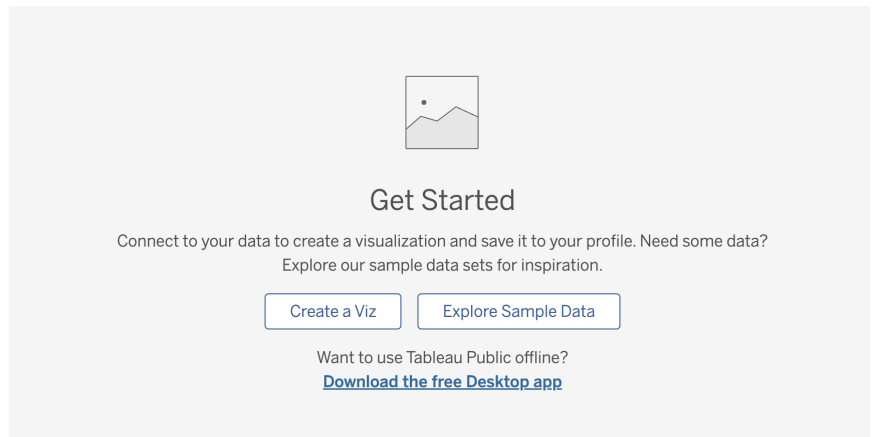
Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

Tableau Public vizzes can handle millions of viewers. All infrastructure is managed by us at no cost.

Tableau Public (Cloud) Example:

<https://public.tableau.com/app/discover>



Start by create→Web Authoring to create a new “viz”, Tableau’s interactive chart.

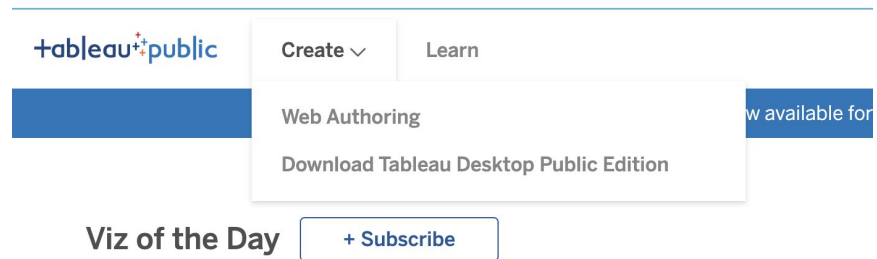


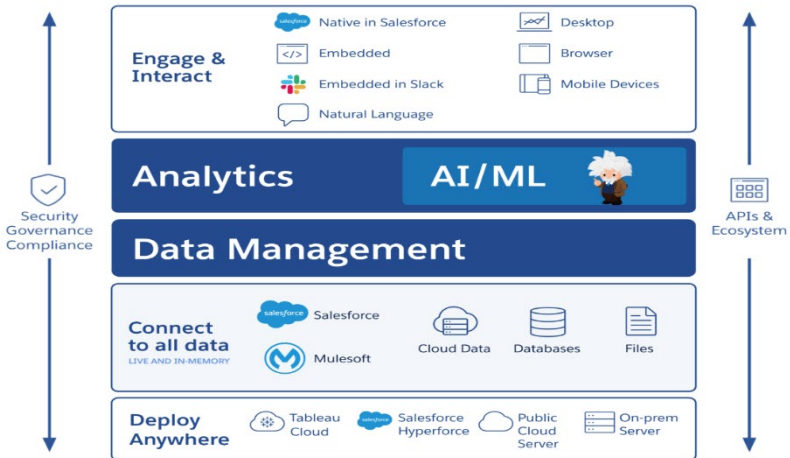
Tableau Server operates substantially the same as Tableau Public and Cloud, but Tableau Server is located on a server that is either on-site at Tableau’s customer’s location or on a public server cluster procured by Tableau’s customer.

For example, the below Tableau Platform diagram shows that the difference in Cloud and Server is a deployment choice. Thus, there is no architectural or functionality difference.

Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

<https://www.tableau.com/products/our-platform>



<https://community.tableau.com/s/news/a0A4T000002fQt1UAE/tableau-cloud-vs-tableau-server-a-guide-on-how-to-compare-server-and-cloud>

What are the major differences between Tableau Online and Tableau Server

- **Tableau Online** is cloud based Software as a Service (SaaS). The hardware and systems that install and maintain Tableau Online are fully managed by Tableau. Upgrades and site backups are all handled by Tableau. Tableau Online sites get the latest product version with its new features as soon as it is available! There is no action required on the customer's side for upgrades and site backups. (For good practice we would recommend having backup copies of workbooks/data sources/flows in the event of accidental deletion by one of your users)
- **Tableau Server** is installed and maintained by the license holder. They are responsible for the hardware and processes to run Tableau Server. It can be installed inside or outside of a company firewall. Upgrades and backups are handled by you as the license holder. You would be responsible for planning and managing an upgrade and maintaining backups of your Tableau Server. Depending on your internal resources and deployment processes this may mean the version of Tableau

Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

	<p>Server you use day to day may lag behind what the latest version available is.</p> <p>https://help.tableau.com/current/blueprint/en-us/bp_server_architecture.htm</p> <p><u>Tableau Server</u></p> <p>Tableau Server provides a full modern analytics platform for your users. Tableau’s architecture is flexible, allowing you to run the platform just about anywhere. You can install Tableau Server on-premises, in your private cloud or data center, on Amazon EC2, Google Cloud Platform, MS Azure, or Alibaba Cloud. Tableau Server can also run on virtualization platforms.</p> <p>Multiple server processes work together to provide services in various tiers. To learn how the processes work together, see Tableau Server Processes on Tableau Public. Because Tableau Server integrates with a number of components in your IT infrastructure, it's important to understand how Tableau Server integrates with your IT infrastructure. For more information on processes, see Tableau Server Processes (Windows Linux). To learn more about Tableau Server processes as deployed in the reference architecture for the minimal enterprise-appropriate Tableau Server deployment, visit Part 2 of the Tableau Server Deployment Guide: Part 2 - Understanding the Tableau Server Deployment Reference Architecture.</p> <p><u>Tableau Cloud</u></p> <p>Tableau Cloud is a software-as-a-service (SaaS) deployment built to scale to serve thousands of sites with thousands of geographically distributed users within a multi-tenant (shared compute) environment. Tableau Cloud takes advantage of high availability features available in the product and cloud architecture best practices to deliver a reliable experience. Tableau Cloud supports a hybrid data architecture with a mix of networks, including on-premises, private cloud, and public cloud.</p> <p><i>Tableau also offers a Desktop version called Tableau Desktop. Tableau Desktop operates in substantially the same way as Tableau Public and Tableau Cloud. Desktop UI is substantially similar in the functionality and look and feel the browser-based UIs. Further Desktop UI can connect with external databases, and can publish charts using Tableau Server, Tableau Cloud, or Tableau Public. Thus, references related to</i></p>
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Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

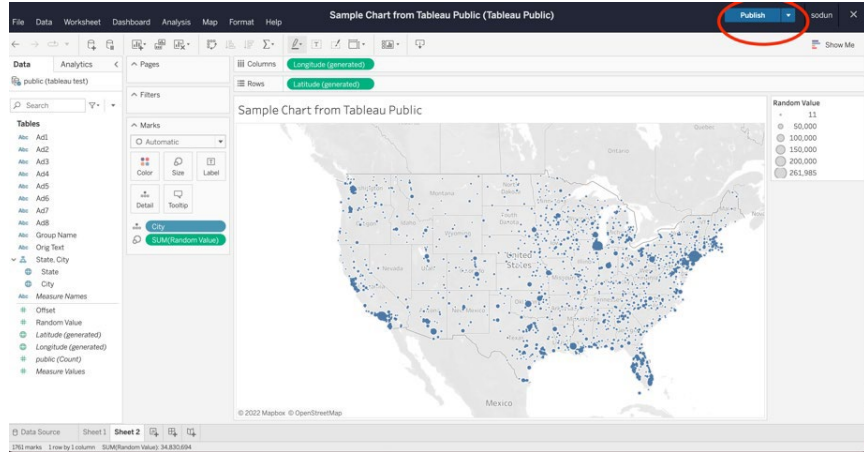
	<p><i>Tableau Desktop herein are equally applicable to Tableau Public, Tableau Cloud, and Tableau Server.</i></p> <p><i>Further, as shown below, Tableau Desktop includes and/or interacts with a data module (Step 1: Connect to your data), template module (Step 2: Drag and drop to take a first look), generation module (Steps 2, 3, 4, 5, 6, 7), and sharing module (Step 8).</i></p> <p>Tableau Desktop Example: https://help.tableau.com/current/guides/get-started-tutorial/en-us/get-started-tutorial-home.htm</p> <p>STEPS</p> <table><tr><td>Step 1: Connect to your data Learn all about the Start page and how to connect to your data.</td><td>GO TO STEP</td></tr><tr><td>Step 2: Drag and drop to take a first look Get to know the Tableau workspace, learn the language of Tableau, and start examining your data.</td><td>GO TO STEP</td></tr><tr><td>Step 3: Focus your results Ask deeper questions and use additional tools to refine your views and gain insights about your data.</td><td>GO TO STEP</td></tr><tr><td>Step 4: Explore your data geographically Learn how to plot your data on a map to see if you can spot any trends.</td><td>GO TO STEP</td></tr><tr><td>Step 5: Drill down into the details Drill down into the details of your data and learn how to create a Top filter.</td><td>GO TO STEP</td></tr><tr><td>Step 6: Build a dashboard to show your insights Learn how to build and format a dashboard to display the visualizations you created.</td><td>GO TO STEP</td></tr><tr><td>Step 7: Build a story to present Learn how to build and format a story to present your findings.</td><td>GO TO STEP</td></tr><tr><td>Step 8: Share your findings Share your findings with your organization on Tableau Server or Tableau Cloud, or share them with the world on Tableau Public.</td><td>GO TO STEP</td></tr><tr><td>Learning Library Now that you're a Data Rockstar, keep learning with these additional resources.</td><td>GO TO LIBRARY</td></tr></table>	Step 1: Connect to your data Learn all about the Start page and how to connect to your data.	GO TO STEP	Step 2: Drag and drop to take a first look Get to know the Tableau workspace, learn the language of Tableau, and start examining your data.	GO TO STEP	Step 3: Focus your results Ask deeper questions and use additional tools to refine your views and gain insights about your data.	GO TO STEP	Step 4: Explore your data geographically Learn how to plot your data on a map to see if you can spot any trends.	GO TO STEP	Step 5: Drill down into the details Drill down into the details of your data and learn how to create a Top filter.	GO TO STEP	Step 6: Build a dashboard to show your insights Learn how to build and format a dashboard to display the visualizations you created.	GO TO STEP	Step 7: Build a story to present Learn how to build and format a story to present your findings.	GO TO STEP	Step 8: Share your findings Share your findings with your organization on Tableau Server or Tableau Cloud, or share them with the world on Tableau Public.	GO TO STEP	Learning Library Now that you're a Data Rockstar, keep learning with these additional resources.	GO TO LIBRARY
Step 1: Connect to your data Learn all about the Start page and how to connect to your data.	GO TO STEP																		
Step 2: Drag and drop to take a first look Get to know the Tableau workspace, learn the language of Tableau, and start examining your data.	GO TO STEP																		
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Learning Library Now that you're a Data Rockstar, keep learning with these additional resources.	GO TO LIBRARY																		
[1(a)] memory that stores a chart template;	<p><i>Tableau Accused Products include a memory that stores a chart template such as workbooks, chart types, dashboards or accelerators or marks (mark types, mark cards) as described below. The memory resides on Tableau's servers or servers controlled by Tableau's customers.</i></p>																		

Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

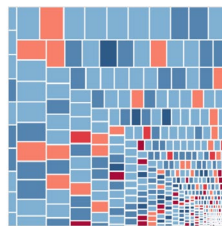
Tableau Accused Products cause chart templates to be stored in memory.

Below is a sample chart creates using Tableau Public and stored in the memory of Tableau’s servers.

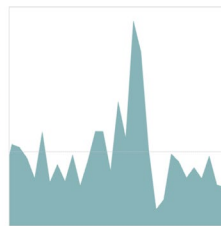


Workbooks templates: <https://www.tableau.com/trial/tableau-templates>

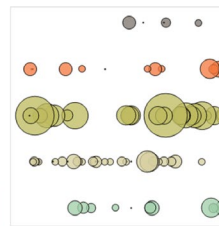
Use the following workbooks as templates to get a jump-start on your analysis.



VISUALIZATION
Salesforce Data Dashboard
CLICK TO INTERACT →



VISUALIZATION
Web Analytics Dashboard
CLICK TO INTERACT →



VISUALIZATION
Facebook Analytics Dashboard
CLICK TO INTERACT →

Chart Types templates:
https://help.tableau.com/current/pro/desktop/en-us/dataview_examples.htm

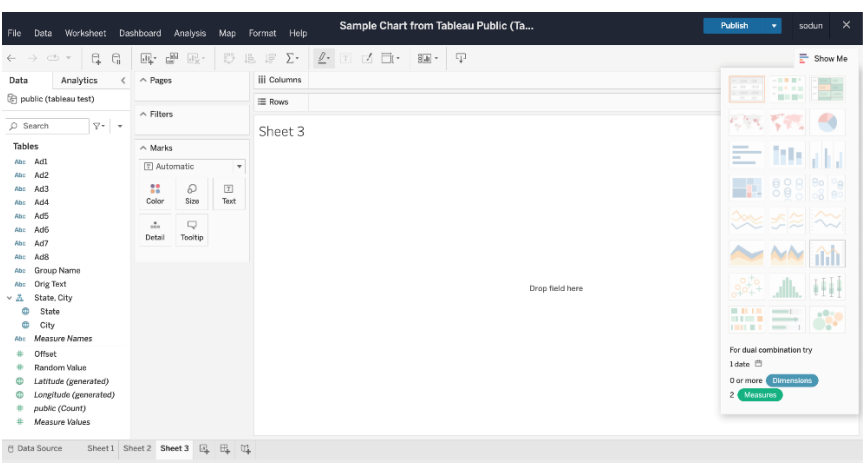
Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

	<h4>Build Common Chart Types in Data Views</h4> <p><i>Applies to: Tableau Desktop</i></p> <p>This section includes detailed exercises that guide you through the steps involved in building some common chart types in data views. All exercises use the Sample - Superstore data source, which is included with Tableau Desktop. This collection of topics is just a sample of the many types of data views that you can create in Tableau. For details on options for building views from scratch, see Build Data Views from Scratch and Build a Basic View to Explore Your Data.</p> <p>Other articles in this section</p> <ul style="list-style-type: none">• Build an Area Chart• Build a Bar Chart• Build a Box Plot• Build a Bullet Graph• Build with Density Marks (Heatmap)• Build a Gantt Chart• Build a Highlight Table• Build a Histogram• Build a Line Chart• Build a Packed Bubble Chart• Build a Pie Chart• Build a Scatter Plot• Build a Text Table• Build a Treemap• Build Combination Charts <p><i>Tableau Cloud, Server, Or Desktop Example:</i> https://help.tableau.com/current/pro/desktop/en-us/buildmanual_dragging.htm</p> <p><u>Start Building a Visualization by Dragging Fields to the View</u></p> <p><i>Applies to: Tableau Cloud, Tableau Desktop, Tableau Server</i></p> <p><i>Then click on “Use Show Me to Start a View”:</i> https://help.tableau.com/current/pro/desktop/en-us/buildauto_showme.htm</p> <p>The Show Me tab on the top right shows multiple chart templates available for selection by the user.</p>
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Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”



2. Click Show Me on the toolbar and then select **the type of view you want to create.**



Any view type that is not gray will **generate a view of your data.** As you hover over each view type, the description at the bottom shows the minimum requirements. In this example, Stacked Bars is selected.

Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

Tableau Dashboard or Accelerators:

<https://www.tableau.com/solutions/exchange/accelerators>

Jumpstart analytics with expert-built dashboards for a variety of use cases across departments, industries, and enterprise applications. Tableau Accelerators are ready-to-use dashboards that you can combine with your data and customize to fit your needs to help you get to data-driven insights faster.

Webpage title: Tableau Dashboard **Starters and templates**

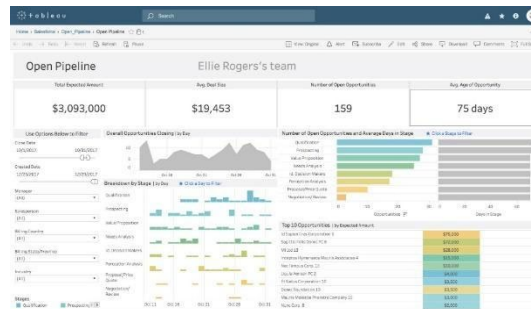
Dashboard Starters for Tableau Online

Go from data to insights to action faster than ever before

Beauty and Brains

Dashboard Starters for Tableau Online are designed to help you hit the ground running with actionable data in minutes. In just a few clicks, you'll be able to connect to common enterprise applications and create beautiful, data-rich dashboards seamlessly.

Salesforce Starters

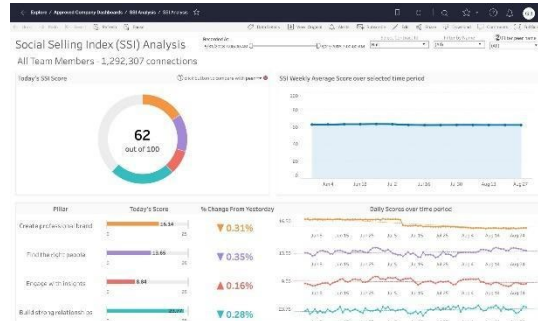


Have a **sales team** your whole industry chases [...]

Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

LinkedIn Sales Navigator Starter

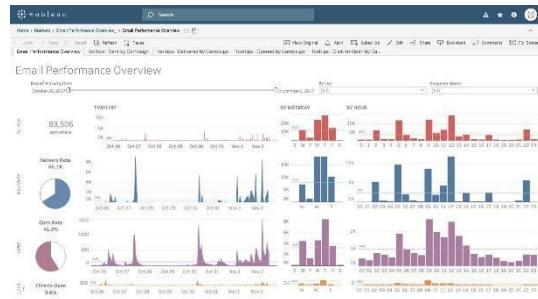


Make your **sales strategy** data-driven [...]

Oracle Eloqua Starters

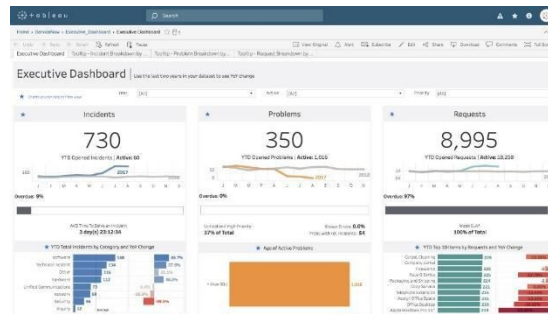
Your **email marketing** data just evolved [...]

Marketo Starters



Your **Marketo** data never looked so good [...]

ServiceNow Starters

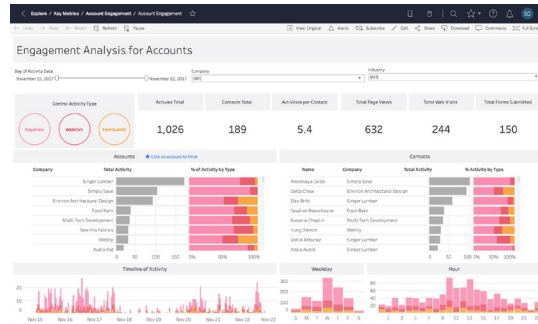


See all facets of your **IT org** [...]

Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

Dashboard Starters



Dashboard Starters are designed to help you hit the ground running with actionable data in minutes. In just a few clicks, you'll be able to connect to popular web applications and **create pre-built dashboards seamlessly**.

https://help.tableau.com/current/pro/desktop/en-us/viewparts_marks_marktypes.htm

Change the mark type

To change the mark type:

- On the [Marks card](#), click the Mark Type drop-down and select an option from the list.

Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

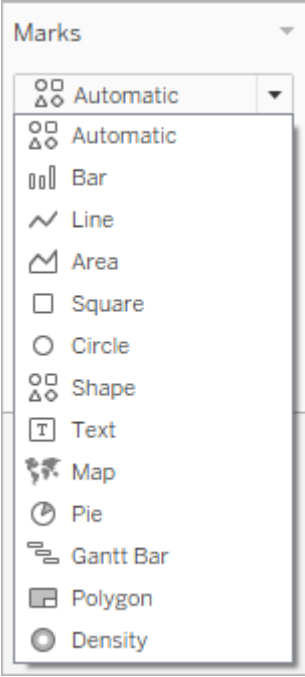
	
<p>[1(b)] a processor, wherein the processor executes instructions stored in the memory, causing the processor to:</p>	<p><i>Tableau’s servers include both a processor and a memory, where the processor executes instructions stored in the memory to generate a user interface, receive chart data and a selection of a chart template and generate an interactive chart, as described below.</i></p> <p><i>Additionally, Tableau’s customers’ servers include both a processor and a memory, where the processor executes instructions stored in the memory to generate a user interface, receive chart data and a selection of a chart template and generate an interactive chart, as described below.</i></p> <p><i>Tableau Accused Products resides on the servers and cause the processors to execute instructions stored in memory to generate a user interface, receive chart data and a selection of a chart template and generate an interactive chart, as described below.</i></p> <p><i>See claim 1(pre), above for disclosures of a processor that executes instructions (e.g., Tableau Cloud, Tableau Public, Tableau Server) stored in memory, as well as the disclosures below for 1(b)(1)-1(b)(4).</i></p>

Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

[1(b)(1)] generate a user interface on a first website,

Tableau Accused Products cause the processor to generate a user interface on a first website.

The Tableau Platform includes Desktop, Web Browser & Mobile user-interfaces (UIs), data management components, and back-end components of Tableau Cloud (formerly Tableau Online), Tableau Public (a free version of Tableau Cloud) and Tableau Server (public cloud or on-prem).

Tableau Platform: <https://www.tableau.com/products/our-platform>

Tableau is the broadest and deepest, end-to-end data and analytics platform. Ensure the responsible use of data and drive better business outcomes with fully-integrated data management and governance, visual analytics and data storytelling, and collaboration...

Tableau Platform:



Tableau Platform:

https://help.tableau.com/current/tableau/en-us/tableau_product_overview.htm? gl=1*21x1xx* ga*ODA0NDczNDYyLjE3MDY1NzlyNDI.* ga 8YLN0SNXVS*MTcxNTYxNTk4MC40MC4xLjE3MTU2MTg1MjkuMC4wLjA

Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

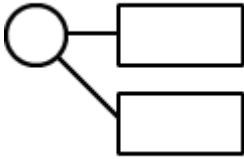
	<p><u>Tableau Product Overview</u></p> <p>Tableau is a complete, flexible analytics platform for harmonizing, managing, and exploring data with interactive visualizations. You can combine and manage data from multiple sources...in the Tableau platform.</p> <p>Tableau Products</p> <div><div data-bbox="581 783 805 919"></div><div data-bbox="857 724 1399 1129"><p>Tableau Cloud</p><p>Tableau Cloud Help (Link opens in a new window)</p><p>Tableau Web Authoring Help (Link opens in a new window)</p></div><div data-bbox="1143 724 1399 961"><p>A fully hosted cloud-based enterprise-grade analytics platform for creating or hosting visualizations, data sources, and flows.</p></div></div> <div><div data-bbox="571 1222 812 1379"></div><div data-bbox="857 1213 1117 1413"><p>Tableau Prep</p><p>Tableau Prep Help (Link opens in a new window)</p></div><div data-bbox="1143 1182 1399 1350"><p>Prepare data for analysis in Tableau, such as combining, shaping, and cleaning data.</p></div></div> <div><div data-bbox="578 1465 812 1705"></div><div data-bbox="857 1501 1117 1738"><p>Tableau Desktop</p><p>Tableau Desktop Help (Link opens in a new window)</p></div><div data-bbox="1143 1470 1399 1812"><p>Provides everything you need to access, visualize, and analyze your data. With an intuitive interface, you can uncover hidden insights and make smart decisions faster.</p></div></div>
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Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

	<div data-bbox="581 344 805 552"></div> <div data-bbox="857 331 1062 363">Tableau Server</div> <div data-bbox="857 396 1109 464">Tableau Server Administrator Help:</div> <div data-bbox="857 497 972 529">On Linux</div> <div data-bbox="857 562 1114 630">(Link opens in a new window)</div> <div data-bbox="857 663 1018 695">On Windows</div> <div data-bbox="857 728 1114 795">(Link opens in a new window)</div> <div data-bbox="1143 331 1390 636">A self-hosted platform, either on-premises or in a public cloud, for creating or hosting visualizations, data sources, or flows. Tableau Server can have multiple sites.</div> <div data-bbox="602 913 784 1043"></div> <div data-bbox="857 852 1066 884">Tableau Mobile</div> <div data-bbox="857 917 1050 984">Tableau Mobile Overview</div> <div data-bbox="857 1018 1114 1085">(Link opens in a new window)</div> <div data-bbox="1143 852 1401 1052">The mobile application interacts with visualizations on your Tableau Server or Tableau Cloud site.</div> <div data-bbox="574 1142 810 1375"></div> <div data-bbox="857 1142 1114 1243">Tableau Public (Link opens in a new window)</div> <div data-bbox="1143 1142 1401 1518">A free platform to explore, create, and publicly share data visualizations online. With the largest repository of data visualizations in the world to learn from, Tableau Public makes developing data skills easy.</div> <div data-bbox="561 1566 1320 1598">Tableau Cloud: http://www.tableau.com/products/cloud-bi</div> <div data-bbox="561 1633 995 1665"><u>Share and collaborate in the cloud</u></div> <div data-bbox="561 1703 1419 1835">Tableau Cloud is the new Tableau Online. Experience a fully-hosted, cloud-based, enterprise-grade solution on the world's #1 analytics platform. As a fast, flexible, easy-to-use self-service platform designed to fit your enterprise architecture, it streamlines the power of data to</div>
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Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

make people faster and more confident decision makers from anywhere. Prepare your data, author, analyze, collaborate, publish, and share in Tableau Cloud.

Tableau Online is your **analytics platform fully hosted in the cloud**. Publish dashboards and share your discoveries with anyone. Invite colleagues or customers to explore hidden opportunities with interactive visualizations and accurate data. **All easily accessible from a browser or on the go with our mobile apps.**

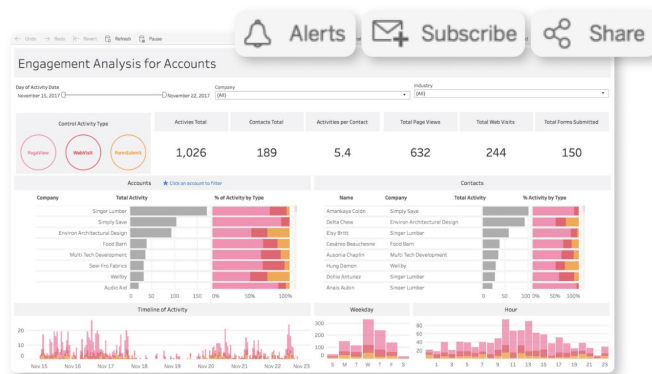


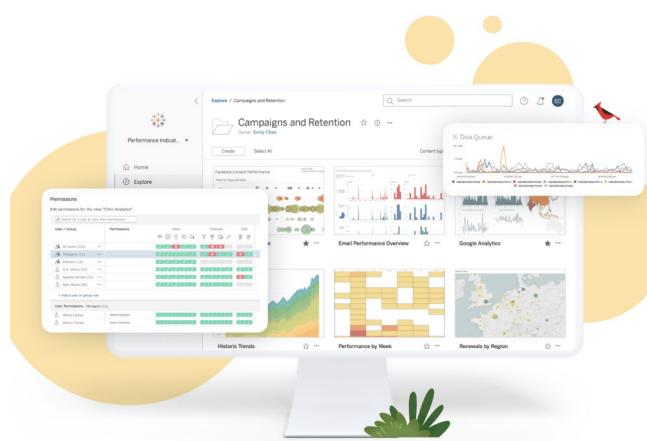
Tableau Server: <http://www.tableau.com/products/server>

Governed self-service analytics at scale with **Tableau Server** [...]

Extend the value of your data across your entire organization with Tableau Server. Empower your business with the freedom to explore data in a trusted environment—without limiting them to predefined questions, wizards, or chart types. Have the peace of mind that both your data and your analytics are governed, secure, and accurate.

Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”



Deploy with unmatched flexibility

Deeply integrate with your enterprise architecture to leverage technology investments. Choose from on-premises or public cloud and configure servers, manage software upgrades, or scale hardware capacity according to your requirements. Connect to any data and turbocharge teamwork by discovering, sharing, collaborating, and exploring data from your mobile device, tablet, or computer.



Whether you're keeping your data on-premises or in the cloud, Tableau Server gives you the flexibility to integrate into your existing data infrastructure. **Install Tableau Server on-premises**, on either Windows or Linux, for ultimate control behind your firewall. **Deploy on Public Cloud** with AWS, Azure or Google Cloud Platform to leverage your existing cloud investment.

Tableau Cloud, Server, Or Desktop Example:

Tableau Help > Tableau Desktop and Web Authoring Help > Build Charts and Analyze Data > Build Data Views From Scratch > Start Building a Viz by Dragging Fields to the View > Use Show Me to Start a View

Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

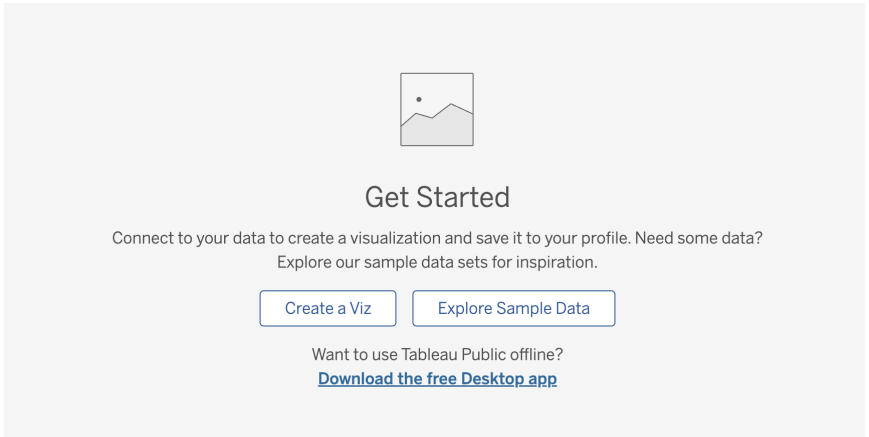
	<p>https://help.tableau.com/current/pro/desktop/en-us/buildmanual_dragging.htm</p> <p><u>Start Building a Visualization by Dragging Fields to the View</u></p> <p><i>Applies to: Tableau Cloud, Tableau Desktop, Tableau Server</i></p> <p>Then click on “Use Show Me to Start a View”: https://help.tableau.com/current/pro/desktop/en-us/buildauto_showme.htm</p> <p><i>Tableau Public is one example of the computer system that Tableau makes and maintains as part of the Tableau Platform. Tableau Public is a basic version of Tableau Cloud. Tableau Public and Tableau Cloud operate in substantially the same way in allowing users to create and publish interactive charts.</i></p> <p><i>Tableau Public allows users to create an interactive chart, using a data module and template module, that is shareable and embeddable.</i></p> <p>Tableau Public (Cloud) Example: https://public.tableau.com/app/discover</p> <div data-bbox="558 1163 1421 1596">The image shows the 'Get Started' screen of Tableau Public. At the top, there is a small icon of a line chart with a dot. Below the icon, the text 'Get Started' is centered. Underneath, it says 'Connect to your data to create a visualization and save it to your profile. Need some data? Explore our sample data sets for inspiration.' There are two buttons: 'Create a Viz' and 'Explore Sample Data'. Below these buttons, it says 'Want to use Tableau Public offline?' followed by a link 'Download the free Desktop app'.</div> <p>Start by create→Web Authoring to create a new “viz”, Tableau’s interactive chart.</p>
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Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

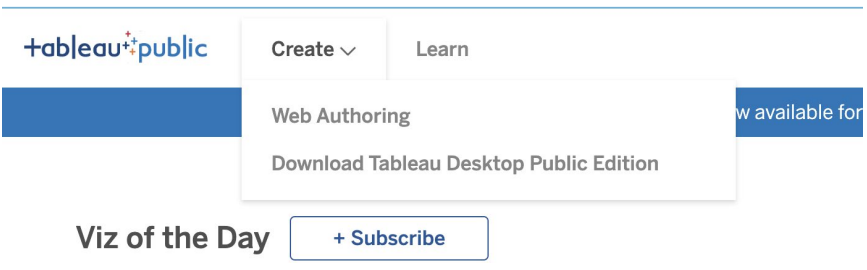
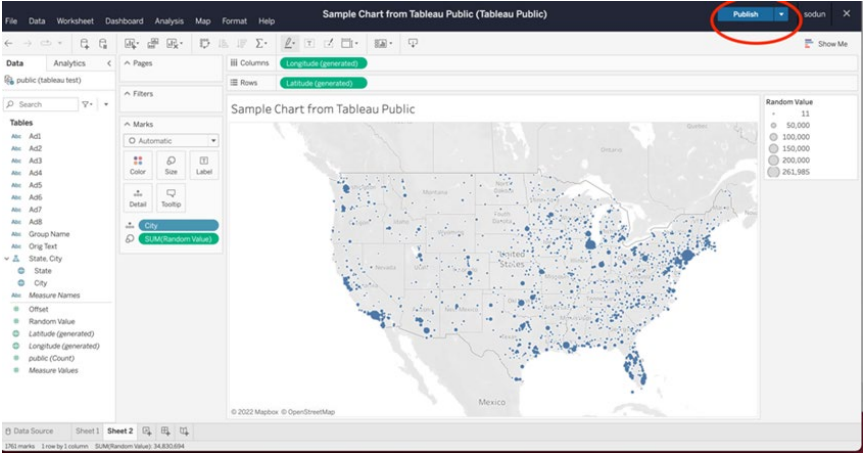
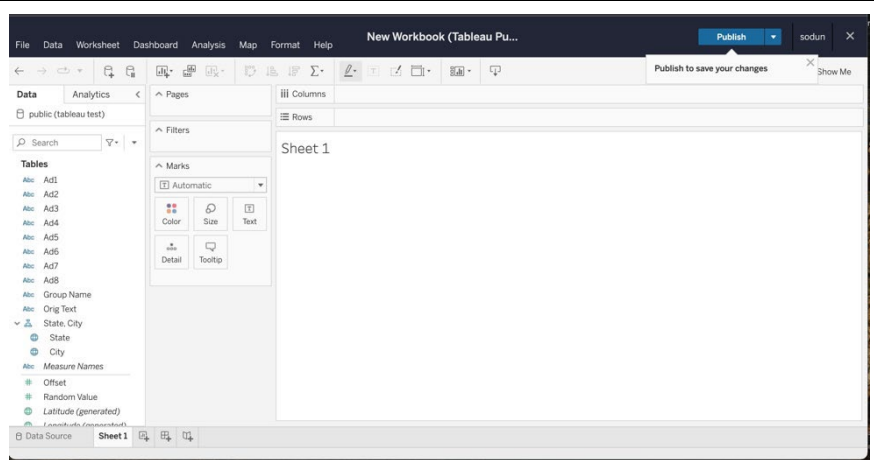
	 <p>For example, a user interface is shown below that is presented on a first website. By selecting chart data and a chart template, the user interface allows the user to create an interactive chart, as shown below.</p>  <p>Each of the user interfaces offered through Desktop, Tableau Cloud, and Tableau Seer are substantially similar to Tableau Public.</p>
<p>[1(b)(2)] receive chart data via the user interface</p>	<p>Tableau Accused Products cause the processor to receive chart data via the user interface.</p> <p>The Data tab on the top left shows multiple sources of chart data</p>

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U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”



As shown below, the **user interface** displayed by Tableau Public includes a **data pane** (e.g. the Data tab on the left of the image). When **chart data has been dragged from the data pane and dropped into the chart pane**, the chart is updated to include the data, as shown above.

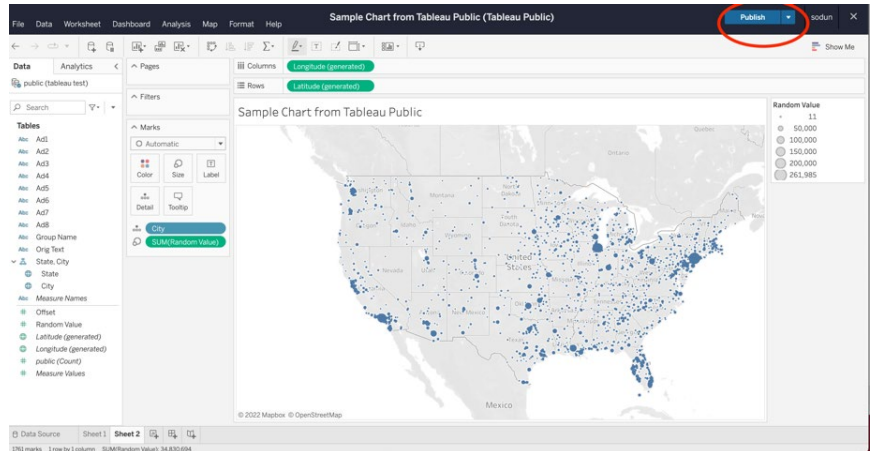


Tableau Help > Tableau Desktop and Web Authoring Help > Build Charts and Analyze Data > Build Data Views From Scratch > Start Building a Visualization by Dragging Fields to the View:

https://help.tableau.com/current/pro/desktop/en-us/buildmanual_dragging.htm

Start Building a Visualization by Dragging Fields to the View

Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

	<p><i>Applies to: Tableau Cloud, Tableau Desktop, Tableau Server</i></p> <p>The basic structure for every view is made of dimension and measure fields placed on the Rows and Columns shelves, and on different properties in the Marks card.</p> <p>You build visualizations by adding fields from the Data pane to the view. As you build a visualization, you can add as many fields as necessary to different areas of the view, and then move those fields around as your explore your data.</p> <p><u>Different ways to start building a view</u></p> <p>When you build a view, you add fields from the Data pane. You can do this in different ways. For example:</p> <ul style="list-style-type: none">• Drag fields from the Data pane and drop them onto the cards and shelves that are part of every Tableau worksheet.• Double-click one or more fields in the Data pane.• Select one or more fields in the Data pane and then choose a chart type from Show Me, which identifies the chart types that are appropriate for the fields you selected. For details, see Use Show Me to Start a View.• Drop a field on the Drop field here grid, to start creating a view from a tabular perspective.  <p>As you start exploring data in Tableau, you will find there are many ways to build a view. Tableau is extremely flexible, and also very forgiving. As you build a view, if you ever take a path that isn't answering your question, you can always undo to a previous point in your exploration.</p>
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Exhibit B

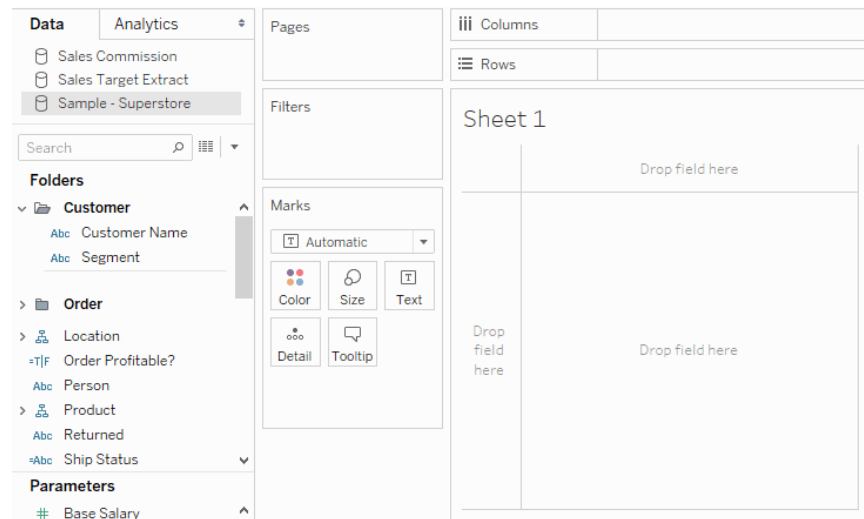
U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

- To undo or redo, click undo  or redo  on the toolbar.

- You can undo all the way back to the last time you opened the workbook. You can undo or redo an unlimited number of times.

Dragging basics

When you begin creating a new data view on a blank worksheet, you can drag a field from the **Data** pane and drop it directly into the view, rather than to a shelf.

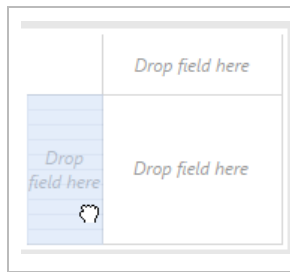


In Tableau Desktop, while dragging fields, you can hover over the different areas in the view to see how the field will be incorporated into the structure of the view. For example, dimensions typically add a row and column headers to the view, while measures add continuous axes. Below are some examples of how fields can be added to the view.

Dimensions add headers	Measures add axes	Show Me automatically adds the field according to best practices
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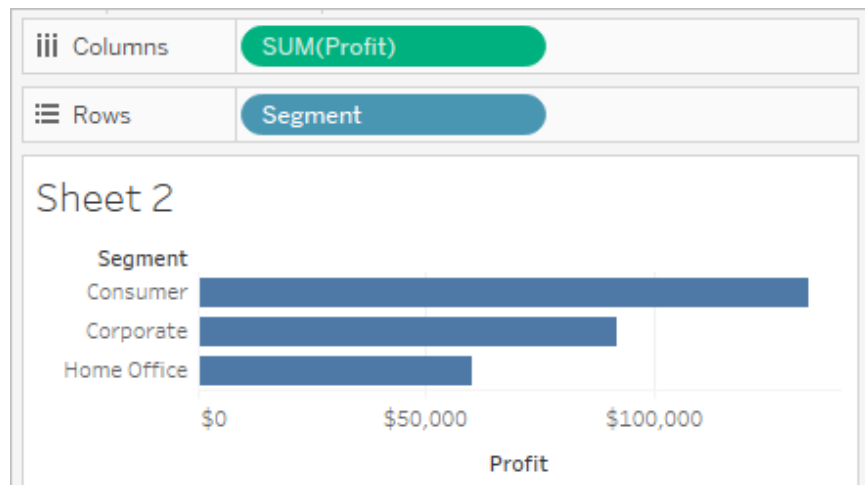
Exhibit B

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For a more advanced discussion of dimensions and measures, see [Dimensions and Measures, Blue and Green](#).

When you drop a field on one of the active areas in the view, the field is added to the view and also to one of the shelves or cards. For example, in the view below the **Segment** dimension was added to the **Rows** shelf and the **Profit** measure was added to the **Columns** shelf—and automatically aggregated so that the values in the data are summed.



You can, of course, also drag fields directly to the shelves instead of to the active areas in the view. You can also drag fields from one shelf to another shelf. To remove a field from a shelf, drag it off the worksheet or select **Remove** from the field's menu (available when you right-click (control-click on Mac) a field in the view). In Tableau Desktop, you can also quickly remove multiple fields from a shelf by right-clicking (control-click on Mac) the shelf and selecting **Clear Shelf**.

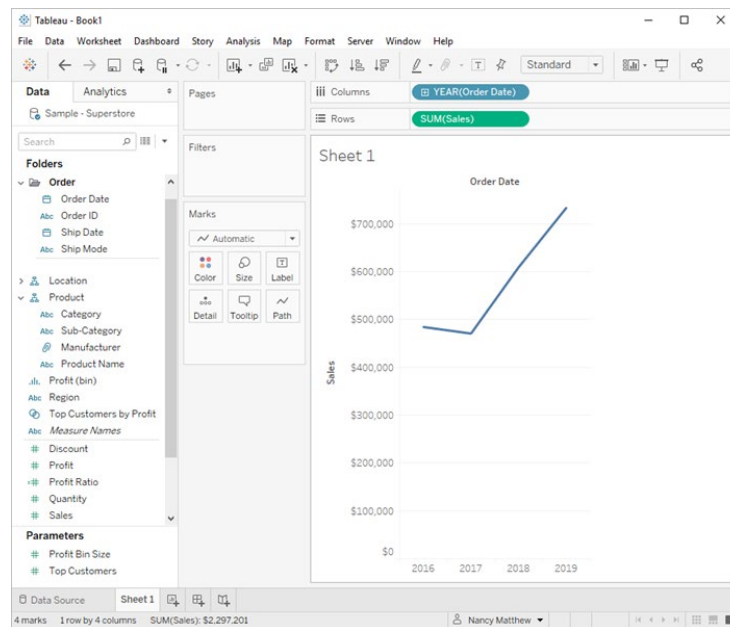
Exhibit B

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	<p><i>Tableau Cloud, Server, Or Desktop Example:</i> https://help.tableau.com/current/pro/desktop/en-us/buildmanual_dragging.htm</p> <p><u>Start Building a Visualization by Dragging Fields to the View</u></p> <p><i>Applies to: Tableau Cloud, Tableau Desktop, Tableau Server</i></p> <p>Then click on “Use Show Me to Start a View”: https://help.tableau.com/current/pro/desktop/en-us/buildauto_showme.htm</p> <p>Step 1: Start Building a Visualization by Dragging Fields to the View</p> <p><i>Applies to: Tableau Cloud, Tableau Desktop, Tableau Server</i></p> <p>Step 2: Drag and drop to take a first look [...]</p> <p><u>Create a view</u></p> <p>You set out to identify key areas for improvement, but where to start? With four years' worth of data, you decide to drill into the overall sales data to see what you find. Start by creating a simple chart. [...]</p> <ol style="list-style-type: none">1. From the Data pane, drag Order Date to the Columns shelf. <p>Note: When you drag Order Date to the columns shelf, Tableau creates a column for each year in your data set. Under each column is an Abc indicator. This indicates that you can drag text or numerical data here, like what you might see in an Excel spreadsheet. If you were to drag Sales to this area, Tableau creates a crosstab (like a spreadsheet) and displays the sales totals for each year.</p> <ol style="list-style-type: none">2. From the Data pane, drag Sales to the Rows shelf. <p>Tableau generates the following chart with sales rolled up as a sum (aggregated). You can see total aggregated sales for each year by order date.</p>
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Exhibit B

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When you first you create a view that includes time (in this case Order Date), **Tableau automatically generates a line chart.**

<https://help.tableau.com/current/guides/get-started-tutorial/en-us/get-started-tutorial-drag.htm>

Ease of Use

Anyone can analyze data with **intuitive drag & drop products**. No programming, just insight.

<https://www.tableau.com/trial/tableau-software>

Tableau Desktop [...]

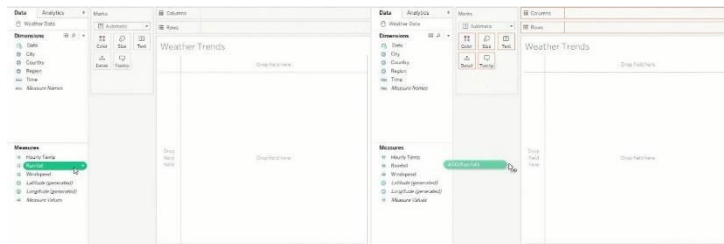


Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

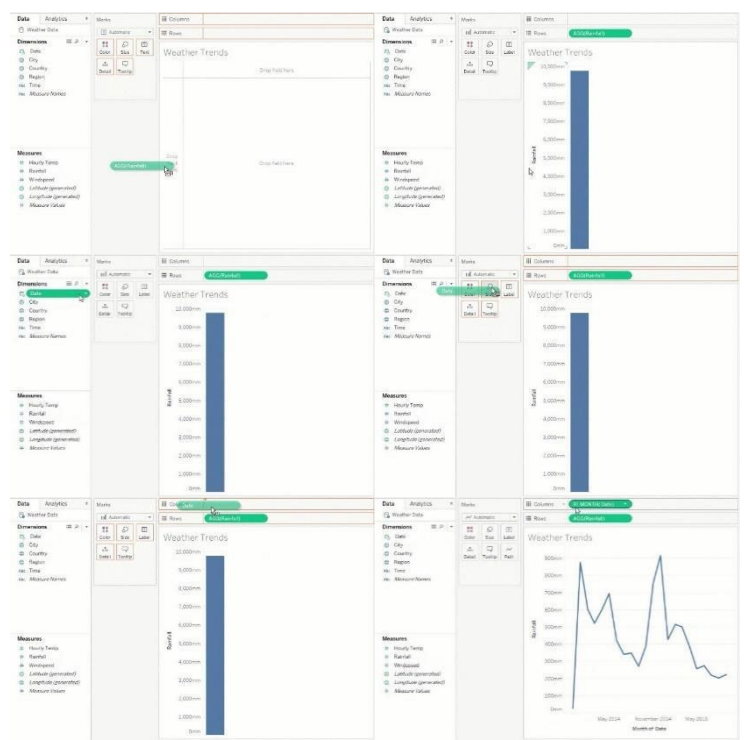
	 <p>The figure displays six screenshots of the Tableau software interface, arranged in a 3x2 grid. Each screenshot shows the 'Weather Trends' dashboard with different visualizations and interface elements. The top row shows a blank workspace with a 'Weather Trends' title and a 'Drag Field Here' prompt. The middle row shows a bar chart visualization with a 'Weather Trends' title and a 'Drag Field Here' prompt. The bottom row shows a line chart visualization with a 'Weather Trends' title and a 'Drag Field Here' prompt. The interface includes a 'Data' pane on the left with fields like 'Date', 'City', 'Country', 'Region', 'Time', and 'Measure Name'. The 'Columns' and 'Rows' shelves are visible at the top of each chart. The line chart in the bottom right shows a trend over time from May 2018 to May 2019.</p> <p><u>Answer deeper questions</u></p> <p>Exceptional analytics demand more than a pretty dashboard. Quickly build powerful calculations from existing data, drag and drop reference lines and forecasts, and review statistical summaries. Make your point with trend analyses, regressions, and correlations for tried and true statistical understanding. Ask new questions, spot trends, identify opportunities, and make data-driven decisions with confidence.</p> <p>https://www.tableau.com/products/desktop</p>
<p>[1(b)(3)] receive a selection of the chart template via the user interface, and</p>	<p><i>Tableau Accused Products cause the processor to receive a selection of the chart template via the user interface.</i></p> <p><i>Tableau Accused Products include chart templates. Tableau Accused Products cause templates from its chart template module to be displayed to users in a chart pane. The Tableau Accused Products software receives a user selection of a chart template in the chart pane because the user's browser sends the user's chart template selection to</i></p>

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Tableau Cloud, Tableau Public, or Tableau Server that resides on a server.

For example, the user may choose a chart template by clicking on a particular chart that is being presented in the chart pane (e.g., workbook templates, Show Me tool bar, Dashboard or Accelerators or marks (mark types, mark cards). Tableau Accused Products then presents data to the user in the style of chart selected by the user.

See claim 1(a) above for chart templates.

Workbooks templates: <https://www.tableau.com/trial/tableau-templates>

Use the following workbooks as templates to get a jump-start on your analysis.

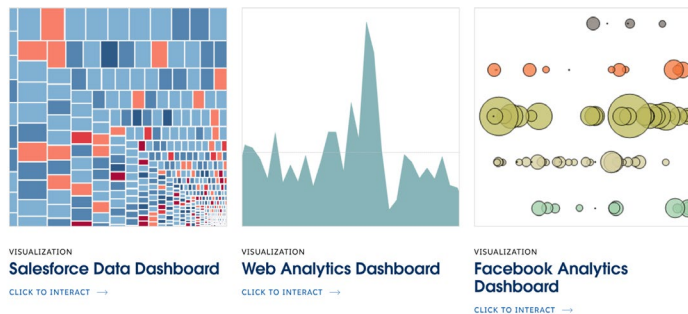


Chart Types templates:
https://help.tableau.com/current/pro/desktop/en-us/dataview_examples.htm

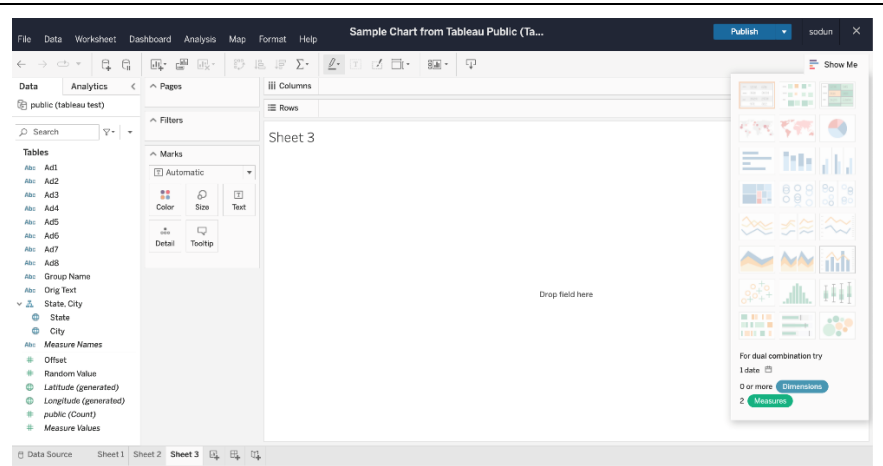
Exhibit B

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	<h4>Build Common Chart Types in Data Views</h4> <p><i>Applies to: Tableau Desktop</i></p> <p>This section includes detailed exercises that guide you through the steps involved in building some common chart types in data views. All exercises use the Sample - Superstore data source, which is included with Tableau Desktop. This collection of topics is just a sample of the many types of data views that you can create in Tableau. For details on options for building views from scratch, see Build Data Views from Scratch and Build a Basic View to Explore Your Data.</p> <p>Other articles in this section</p> <ul style="list-style-type: none">• Build an Area Chart• Build a Bar Chart• Build a Box Plot• Build a Bullet Graph• Build with Density Marks (Heatmap)• Build a Gantt Chart• Build a Highlight Table• Build a Histogram• Build a Line Chart• Build a Packed Bubble Chart• Build a Pie Chart• Build a Scatter Plot• Build a Text Table• Build a Treemap• Build Combination Charts <p><i>Tableau Cloud, Server, Or Desktop Example:</i> https://help.tableau.com/current/pro/desktop/en-us/buildmanual_dragging.htm</p> <p><u>Start Building a Visualization by Dragging Fields to the View</u></p> <p><i>Applies to: Tableau Cloud, Tableau Desktop, Tableau Server</i></p> <p><i>Then click on “Use Show Me to Start a View”:</i> https://help.tableau.com/current/pro/desktop/en-us/buildauto_showme.htm</p> <p>The Show Me tab on the top right shows multiple chart templates available for selection by the user.</p>
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2. Click Show Me on the toolbar and then select **the type of view you want to create.**



Any view type that is not gray will **generate a view of your data**. As you hover over each view type, the description at the bottom shows the minimum requirements. In this example, Stacked Bars is selected.

Tableau Dashboard or Accelerators:

<https://www.tableau.com/solutions/exchange/accelerators>

Jumpstart analytics with expert-built dashboards for a variety of use cases across departments, industries, and enterprise applications. Tableau Accelerators are ready-to-use dashboards that you can

Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

combine with your data and customize to fit your needs to help you get to data-driven insights faster.

Webpage title: Tableau Dashboard **Starters** and templates

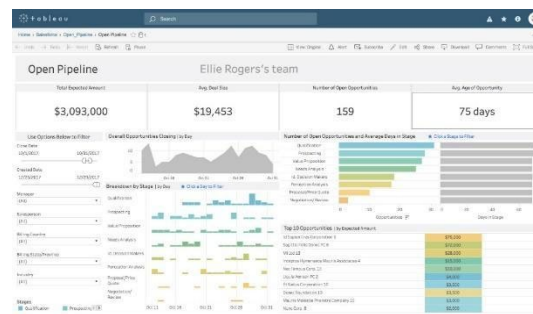
Dashboard **Starters** for Tableau Online

Go from data to insights to action faster than ever before

Beauty and Brains

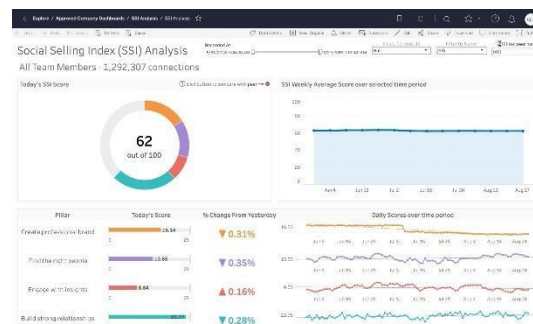
Dashboard Starters for Tableau Online are designed to help you hit the ground running with actionable data in minutes. In just a few clicks, you'll be able to connect to common enterprise applications and create beautiful, data-rich dashboards seamlessly.

Salesforce **Starters**



Have a **sales team** your whole industry chases [...]

LinkedIn Sales Navigator **Starter**



Make your **sales strategy** data-driven [...]

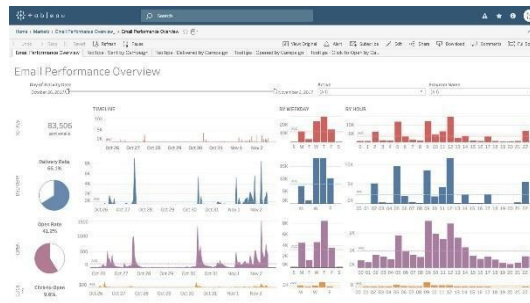
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Oracle Eloqua Starters

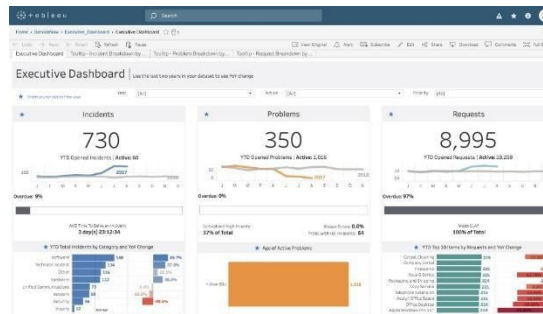
Your **email marketing** data just evolved [...]

Marketo Starters



Your **Marketo** data never looked so good [...]

ServiceNow Starters



See all facets of your **IT org** [...]

Dashboard Starters

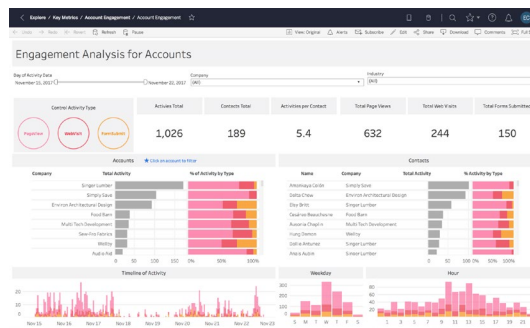


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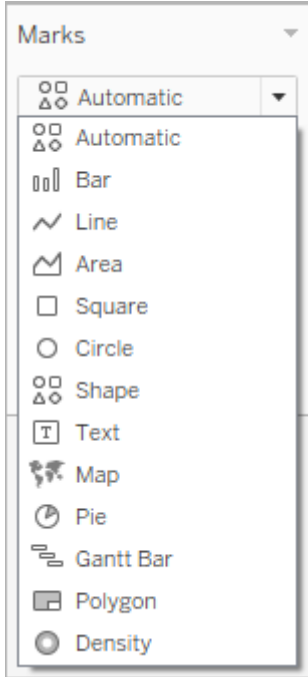
	<p>Dashboard Starters are designed to help you hit the ground running with actionable data in minutes. In just a few clicks, you’ll be able to connect to popular web applications and create pre-built dashboards seamlessly.</p> <p>https://help.tableau.com/current/pro/desktop/en-us/viewparts_marks_marktypes.htm</p> <p><u>Change the mark type</u></p> <p>To change the mark type:</p> <ul style="list-style-type: none">On the Marks card, click the Mark Type drop-down and select an option from the list. 
[1b)(4)] generate an interactive chart including the chart data and the chart template; and	<p><i>Tableau Accused Products cause the processor to generate an interactive chart including the chart data and the chart template.</i></p> <p><i>See claim 1(b)(2) above for the chart data; see claim 1(a) above for the chart template.</i></p>

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By selecting **chart data** and a **chart template**, the **user interface** allows the user to create an **interactive chart**, as shown below.

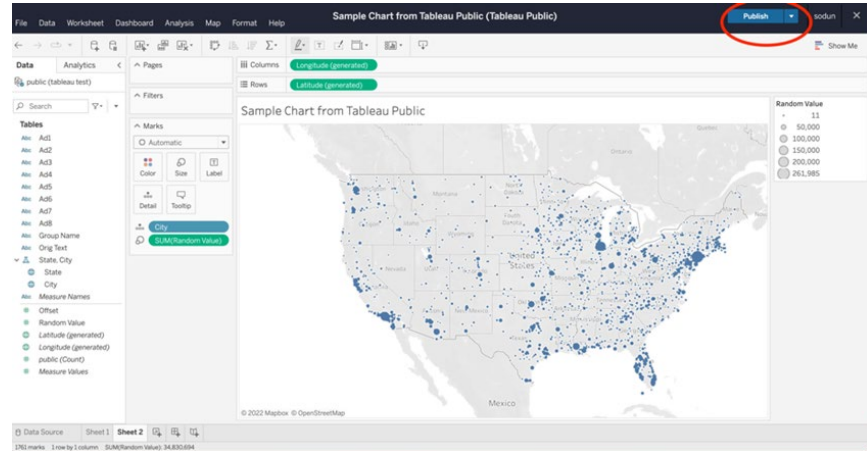


Tableau Cloud, Server, Or Desktop Example:

https://help.tableau.com/current/pro/desktop/en-us/buildmanual_dragging.htm

Start Building a Visualization by Dragging Fields to the View

Applies to: Tableau Cloud, Tableau Desktop, Tableau Server

Then click on “Use Show Me to Start a View”:

https://help.tableau.com/current/pro/desktop/en-us/buildauto_showme.htm

Use Show Me to **Start a View** [...]

Show Me creates a view based on the fields already used in the view and any **fields** you’ve **selected in the Data pane**. Open Show Me by clicking Show Me on the toolbar  **Show Me**.

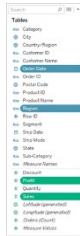
Start a view based on fields that you select

To use Show Me, **select the fields you want to analyze in the Data pane**, and then **select the type of view you want to create in the Show Me pane**. Tableau automatically evaluates the selected fields and gives you the option of several types of views that would be appropriate for those fields. **Show Me also highlights the visualization type that best matches the data.**

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1. In the **Data pane**, select the **fields** that you want to **analyze**. Hold the Ctrl key (Command key on a Mac) to make multiple selections.



2. Click Show Me on the toolbar and then select the type of view you want to create.

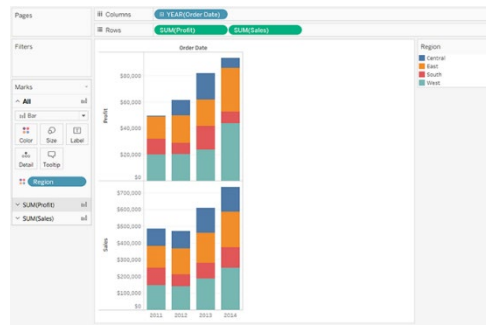


Any view type that is not gray will **generate a view of your data**. As you hover over each view type, the description at the bottom shows the minimum requirements. In this example, Stacked Bars is selected.

3. **View the Result. Tableau automatically creates a view of the data.**

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https://help.tableau.com/current/pro/desktop/en-us/buildauto_showme.htm

Tableau Help > Tutorial: Get Started with Tableau Desktop > Step 2: Drag and drop to take a first look

Contents:

Overview

Step 1: Connect to your data

Step 2: Drag and drop to take a first look

Step 3: Focus your results

Step 4: Explore your data geographically

Step 5: Drill down into the details

Step 6: Build a dashboard to show your insights

Step 7: Build a story to present

Step 8: Share your findings with others

Learning Library

Step 2: **Drag and drop** to take a first look [...]

Create a view

You set out to identify key areas for improvement, but where to start? With four years' worth of data, you decide to drill into the overall sales data to see what you find. Start by creating a simple chart. [...]

1. **From the Data pane, drag Order Date to the Columns shelf.**

Note: When you drag Order Date to the columns shelf, Tableau creates a column for each year in your data set. Under each

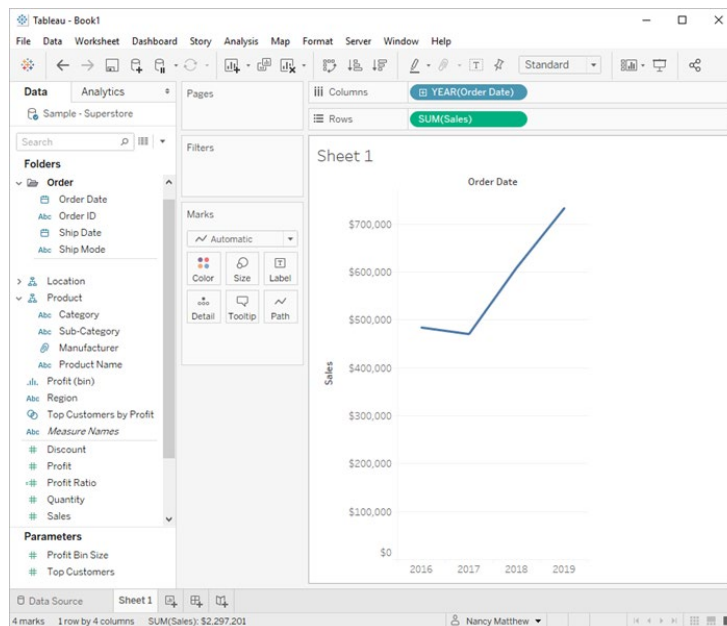
Exhibit B

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column is an Abc indicator. This indicates that you can drag text or numerical data here, like what you might see in an Excel spreadsheet. If you were to drag Sales to this area, Tableau creates a crosstab (like a spreadsheet) and displays the sales totals for each year.

2. From the Data pane, drag Sales to the Rows shelf.

Tableau generates the following chart with sales rolled up as a sum (aggregated). You can see total **aggregated sales for each year by order date**.



When you first you create a view that includes time (in this case Order Date), **Tableau automatically generates a line chart**.

<https://help.tableau.com/current/guides/get-started-tutorial/en-us/get-started-tutorial-drag.htm>

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Download a Starter Dashboard

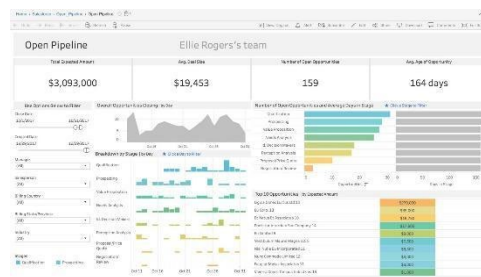
Starter dashboards are an easy way to get a jump on your analysis

Try out Dashboard Starters with your own data

Dashboard Starters are designed to help you jumpstart your analysis with actionable data in minutes. In just a few clicks, you can **connect to common enterprise applications** and **create beautiful, data-rich dashboards** seamlessly - **all with your own data**.

If you're a current Tableau Desktop customer, you can **download the powerful Dashboard Starters as packaged workbooks**. Swap out **the data source** and get ready to **go from data to insights** faster than ever before. See full instructions below.

Salesforce Starters



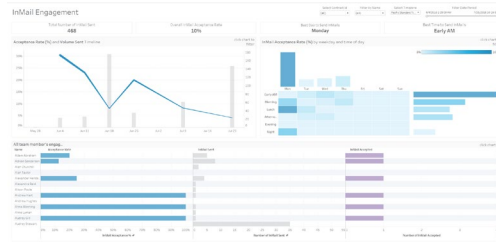
With Salesforce Starters you'll be able to fine-tune your sales funnel, better support your sales team, and **unlock the power of your own sales data** faster than ever before.

The Salesforce Starters include the following dashboards: Account Tracking, Open Pipeline, Opportunity Overview, Opportunity Tracking, Quarterly Sales Results, Top Accounts, and Marketing Leads.

Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

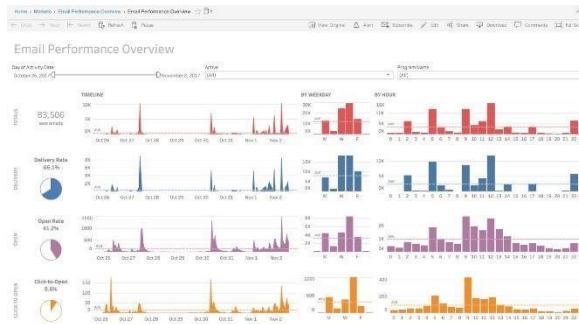
LinkedIn Sales Navigator Starter



Seamlessly **access your LinkedIn Sales Navigator usage data** in Tableau and **uncover insights** that will drive your sales effectiveness and maximize productivity.

The LinkedIn Sales Navigator Starters include the following dashboards: Product Utilization, Performance Overview, InMail Engagement, Target Search, and SSI Analysis.

Marketo Starters



With Marketo Starters, you can **pull together your marketing automation data into visualizations** that help you see what tactics are winning over converts and what messages are getting lost in the mix.

The Marketo Starters include the following dashboards: Email Performance Overview, Email Performance by Campaign, and Web Engagement by Account

Oracle Eloqua Starters

Go from 10,000 feet to deep into the details of any **campaign**. Understand how a single customer or how a whole industry is

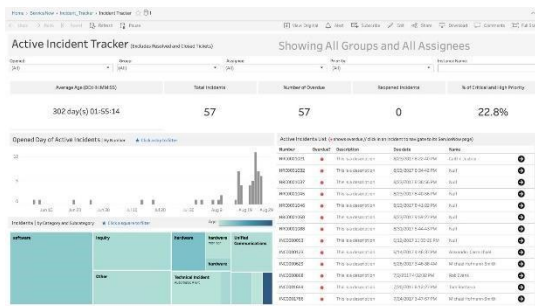
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consuming your content. No need to fear **the data you have**. Oracle Eloqua Starters will **take you from data to insight to action** in moments.

The Oracle Eloqua Starters include the following dashboards: Engagement Analysis for Accounts, Campaign Performance Overview, Campaign Details Dashboard, and Account Engagement Dashboard.

ServiceNow Starters



With ServiceNow Starters, you'll be able to **seamlessly pull all of your ServiceNow IT Service Management data into Tableau**, complete with **pre-built dashboards ready for action**.

The ServiceNow Starters include the following dashboards: Executive Dashboard, Request Report, Problem Tracker, Problem Report, Incident Tracker, and Incident Report dashboard.

Snowflake Starters



See and understand your Snowflake Account with these Snowflake Starters! These **pre-built dashboards*** help you **manage and monitor your Snowflake deployment** to ensure you're meeting the speed and cost control your organization requires.

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	<p>The Snowflake Starters include the following dashboards: Compute Cost Overview, Compute Credit Forecasting, Storage Cost, Snowflake Query Utilization, User Adoption, Performance Monitoring, Slowest Running Queries, and Error Tracking.</p> <p>[...]</p> <p><u>How to use your downloaded Dashboard Starters</u></p> <ol style="list-style-type: none">1. Download the Dashboard Starter of your choosing.2. Double click on the workbook to open it in Tableau Desktop. Don't have Tableau Desktop? Start a free trial today. <p><u>Get your data into the dashboards</u></p> <ol style="list-style-type: none">1. Double click on the workbook to open it in Tableau Desktop2. You will need to connect to the appropriate data source to view your own data. Select the “Data Source” tab. A dialog box will appear prompting you for your application credentials (i.e. Salesforce log-in and password).3. Enter your credentials and log-in to your account. If you are using the Salesforce Starter, first ensure your account has API access to your Salesforce instance.4. Now go back to the dashboard. Tableau Desktop will then create an extract of your data. You may want to start with one or two weeks of data so that extract can be created quickly.5. If any worksheets appear blank, navigate to the worksheet. Replace reference fields by right-clicking on the fields with red exclamation marks as necessary. <p>Now you're ready to explore your data and gain insights at the speed of thought.</p> <p>https://www.tableau.com/products/dashboard-starters-downloads</p> <p><u>Self-service analytics in the cloud with Tableau Online</u></p> <p>[...]</p>
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Share and collaborate in the cloud

Tableau Online is your analytics platform fully hosted in the cloud. Publish dashboards and share your discoveries with anyone. Invite colleagues or customers to explore hidden opportunities with **interactive visualizations** and **accurate data**. All easily accessible from a browser or on the go with our mobile apps.

Ask questions with natural language

Empower your organizations to ask questions from any published data source using natural language. With Ask Data, type a question and get answers in the form of a viz. Under the hood, Ask Data uses powerful algorithms to automatically profile, index, and optimize data sources. Plus with our end-to-end web authoring capabilities, it's easy to add additional data sources or **create fully interactive dashboards**.

[...]

Connect to any data anywhere

Connect to cloud databases like Amazon Redshift and Google BigQuery. **Automatically refresh data from web apps** like Google Analytics and Salesforce. Live query on-premises databases or schedule extract refreshes with Tableau Bridge — it's your choice.

[...]

Dashboard Starters

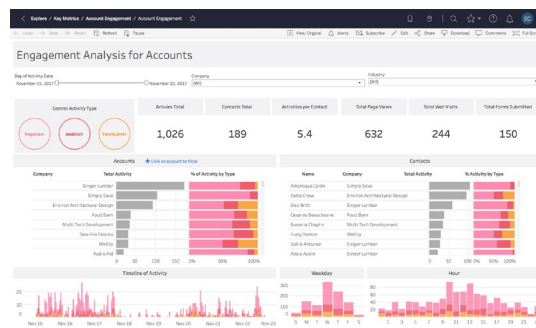


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Dashboard Starters are designed to help you hit the ground running with actionable data in minutes. In just a few clicks, you’ll be able to connect to popular web applications and **create pre-built dashboards seamlessly**.

Empowering organizations with data

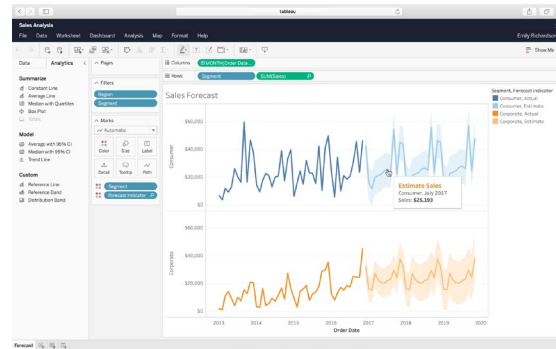


Tableau Online enables everyone in an organization to **see and understand data**, with offerings for every user type. Starting with casual users looking to make data driven decisions from a published dashboard, data enthusiasts who want to use web authoring to ask new questions from published data source, to data geeks who want to **create and share their vizzes and data sources** with the rest of the organization.

[https://help.tableau.com/current/pro/desktop/en-us/viewparts marks marktypes.htm](https://help.tableau.com/current/pro/desktop/en-us/viewparts_marks marktypes.htm)

Change the mark type

To change the mark type:

- On the [Marks card](#), click the Mark Type drop-down and select an option from the list.

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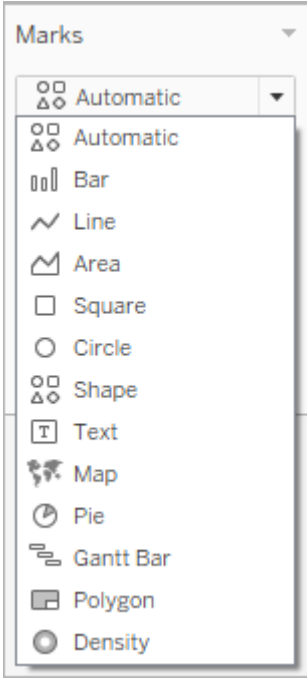
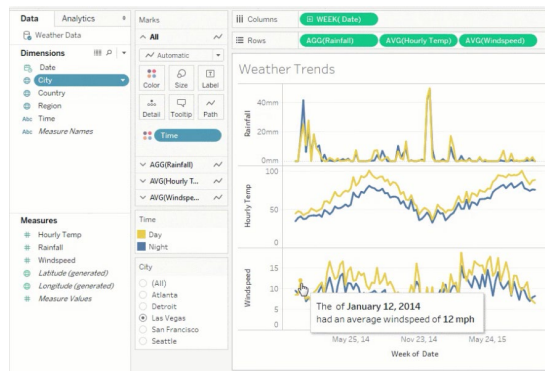
	<div data-bbox="654 315 959 989"></div> <div data-bbox="560 1045 1130 1077"><p>https://www.tableau.com/products/cloud-bi</p></div> <div data-bbox="560 1113 1045 1144"><p><u>Create, edit, and interact on the web</u></p></div> <div data-bbox="560 1180 1419 1247"><p>Spark new insights—even on the go. Give people the power to build and explore interactive dashboards from anywhere.</p></div> <div data-bbox="560 1283 1149 1314"><p>https://www.tableau.com/trial/tableau-online</p></div> <div data-bbox="560 1350 1149 1381"><p><u>Get Tableau Desktop as part of Tableau Creator</u></p></div> <div data-bbox="560 1417 896 1449"><p><u>Get actionable insights fast</u></p></div> <div data-bbox="560 1484 1419 1654"><p>Leave chart builders behind. Live visual analytics fuel unlimited data exploration. Interactive dashboards help you uncover hidden insights on the fly. Tableau harnesses people’s natural ability to spot visual patterns quickly, revealing everyday opportunities and eureka moments alike.</p></div>
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<http://www.tableau.com/products/desktop>

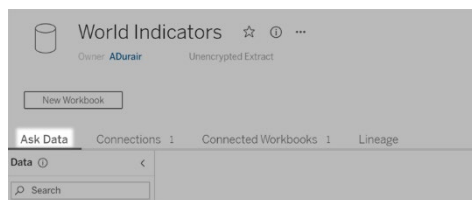
Tableau Help > Tableau Desktop and Web Authoring Help > **Build Charts and Analyze Data > Automatically Build Views with Ask Data** [...]

Automatically Build Views with Ask Data [...]

Ask Data introduces an entirely new way to **interact with your data**, letting you type a question and instantly get a response right in Tableau. Answers come in the form of **automatic data visualizations**, with no need to manually drag-and-drop fields or understand the nuances of your data's structure. [...]

Ask Data to quickly build a viz

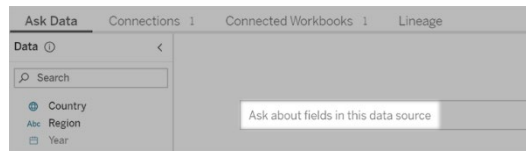
1. In Tableau Server or Tableau Online, **navigate to a data source**, and then click **Ask Data** at left.



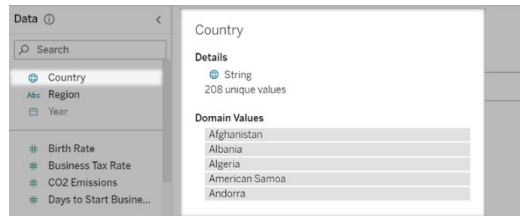
2. In the text box reading “Ask about fields in this data source”, enter terms from the data source fields at left.

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Hover over each field to learn more about the data it contains. Unlike the data fields seen in standard Tableau views, these fields can't be dragged to the canvas.



3. As you type, Ask Data automatically completes your entry using likely combinations of data fields and analytical functions. To automatically create a viz, either press Enter, or choose from suggested entries below the text box. Just like that, **you've created a compelling visualization of your data!**

[...]

In the text box, do any of the following:

- **Change the viz type with phrasing like “as a bar chart”.**

[...]

Change the viz type

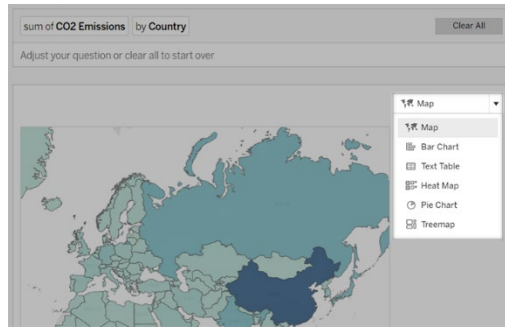
If the **default viz** doesn't fully reveal your data, click the menu at upper right, and choose from these **supported viz types**:

- Bar
- Gantt Bar
- Heat Map
- Histogram
- Line
- Map

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- Pie
- Scatter
- Text
- Treemap



Note: To **automatically create certain viz types**, Ask Data sometimes adds fields like “Number of Records” to your entries.

[...]

Add sheets with other vizzes

To quickly create multiple different vizzes from a data source, add sheets in Ask Data, and then **save them in a new workbook**.

[...]

Save the vizzes in a new workbook

Save vizzes from Ask Data to combine them with other Tableau views and dashboards **in a workbook**. In a workbook, Ask Data is unavailable, but you gain access to Tableau's full range of data analysis and visualization tools.

1. Above the viz, click the **save icon** , and choose **Save as** if you're saving the viz for the first time, or **Save** to overwrite a previously saved version.
2. If you chose **Save as**, select Embed password for data source if people who lack access will be viewing the viz.

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	<p>https://help.tableau.com/current/pro/desktop/en-us/ask_data.htm</p> <p>Tableau Help > Tableau Desktop and Web Authoring Help > ... [Build Charts and Analyze Data] > Build Data Views from Scratch > Add Interactivity using Actions [...]</p> <p>Add context and interactivity to your data using actions. Users interact with your visualizations by selecting marks, or hovering, or clicking a menu, and the actions you set up can respond with navigation and changes in the view.</p> <p>https://help.tableau.com/current/pro/desktop/en-us/actions.htm</p> <p><u>For Tableau Desktop</u></p> <p>In Tableau Desktop, there are several ways for you to save your work:</p> <p>Automatically save a workbook - Automatically saves the workbook in the same location as the original file. In the event of a crash, a recovered version is available. [...]</p> <p><u>Save a workbook</u></p> <p>When you open Tableau Desktop, it automatically creates a new workbook. Workbooks hold the work you create and consist of one or more worksheets. Each worksheet contains a particular view of your data.</p> <p>To save a Tableau workbook:</p> <p>Select File > Save.</p> <p>Specify the workbook file name in the Save As dialog box.</p> <p>By default, Tableau saves the file with the .twb extension. By default, Tableau saves your workbook in the Workbooks folder in your My Tableau Repository. You can find this repository in your Documents folder. However, you can save Tableau workbooks to any directory you choose.</p> <p>https://help.tableau.com/current/pro/desktop/en-us/save_savework.htm</p>
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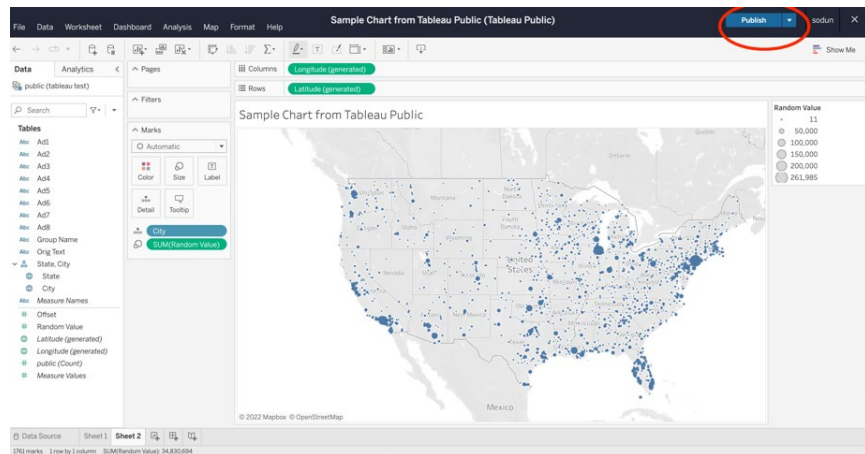
[1(c)] a network interface that, in response to generation of the interactive chart, transmits the interactive chart to a second website for display without the execution of the instructions stored in the memory to generate the user interface of the first website,

[1(d)] wherein the second website receives an input from a second user and updates the interactive chart after the second website receives the input.

Tableau Accused Products include a network interface that, in response to generation of the interactive chart, transmits the interactive chart to a second website for display without the execution of the instructions stored in the memory to generate the user interface of the first website.

Tableau Accused Products allow ‘publishing’ charts using either Tableau Public, Tableau Server, or Tableau Cloud. A user’s license determines what they have access to. Tableau Public is available for free. Tableau Platform provides several user interfaces, e.g., Tableau browser UI or Tableau Desktop UI that is webbased, to invoke the sharing module’s capabilities.

*As shown below the **interactive chart** created in the example below can be published by clicking on the “Publish” button shown below using Tableau Public.*



The “published” interactive chart is shown below as seen on a second website.

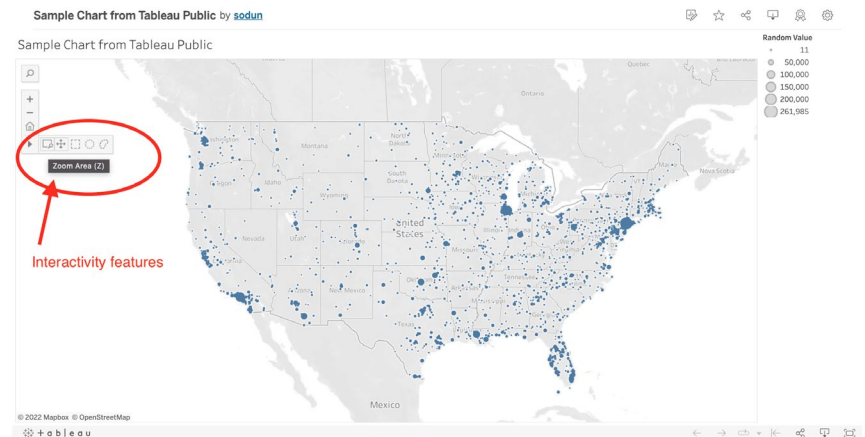
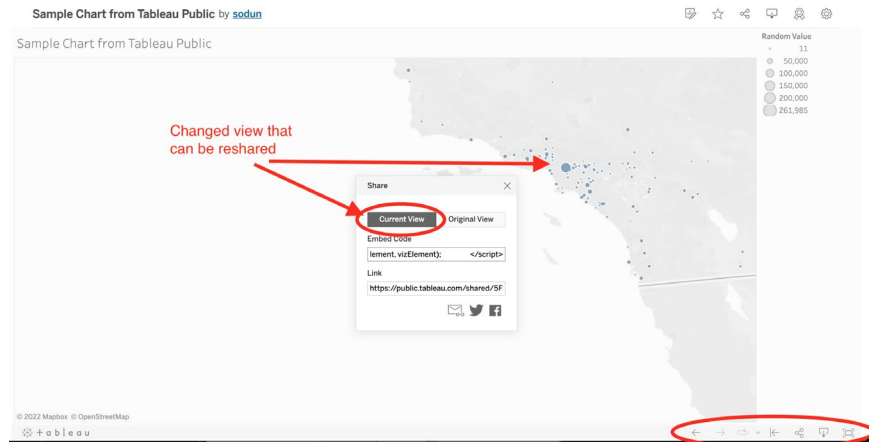


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By selecting a zoom function (as shown above), the published **interactive chart** can be **modified without using the user interface** on the first website, as shown below. Thus, the second website receives an input from a second user and updates the interactive chart after the second website receives the input.



The operation of the Tableau Platform was further verified by inspecting the code transmitted between the two websites to confirm that the re-rendering of the chart shown above is performed entirely by code executed on the client computer and the second website for display, without the execution of the instructions stored in the memory to generate the user interface of the first website.

Sample code (the first part in red is the viz ID which identifies the particular visualization object on the Tableau Public server. The visualization object is the meta-data-file containing all relevant meta-data. The second part in red is the actual code that gets pulled into the web page in real-time when the page is opened. The code then pulls in the meta-data, renders the charts and processes all interactivity commands):

```
-----  
<div class='tableauPlaceholder' id='viz1645577202124' style='position:  
relative'><noscript><a  
href='http://www.curvediscussion.com/design-is-  
justification-mm44-bank-  
holidays/?pk_campaign=tp&pk_kwd=mm44'><img  
alt='BankHolidays ' src='Y8Y8BRZW9G51_rss.png'  
style='border: none' /></a></noscript><object class='tableauViz'  
style='display:none;'><param name='host_url'
```

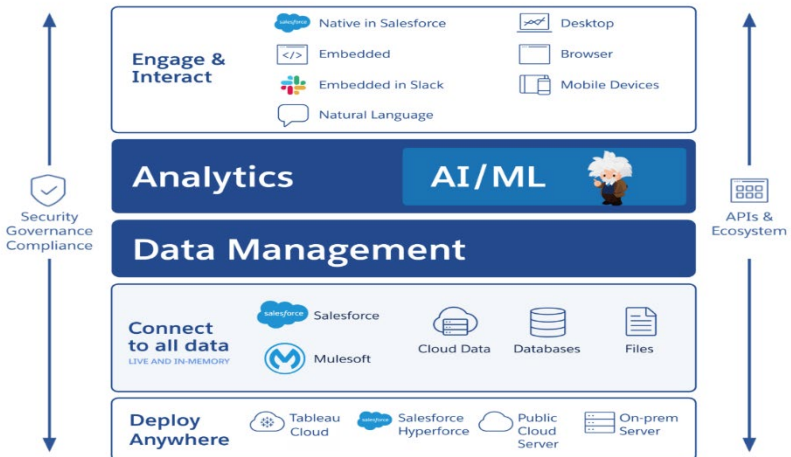
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	<pre>value='https%3A%2F%2Fpublic.tableau.com%2F' /> <param name='embed_code_version' value='3' /> <param name='path' value='shared&#47;Y8BRZW9G5' /> <param name='toolbar' value='yes' /><param name='static_image' value='Y8&#47;Y8BRZW9G5&#47;1.png' /> <param name='animate_transition' value='yes' /><param name='display_static_image' value='yes' /><param name='display_spinner' value='yes' /><param name='display_overlay' value='yes' /><param name='display_count' value='yes' /><param name='tabs' value='no' /></object></div> <script type='text/javascript'> var divElement = document.getElementById('viz1645577202124'); var vizElement = divElement.getElementsByTagName('object')[0]; vizElement.style.width='1000px';vizElement.style.height='1027px'; var scriptElement = document.createElement('script'); scriptElement.src = 'https://public.tableau.com/javascripts/api/viz_v1.js'; vizElement.parentNode.insertBefore(scriptElement, vizElement); </script></pre> <p>-----</p> <p><i>Tableau Cloud and Tableau Server operate in substantially the same way as Tableau Public in allowing users to “publish” or embed interactive charts to a second website for display without the execution of the instructions stored in the memory to generate the user interface of the first website where the second website receives an input from a second user and updates the interactive chart after the second website receives the input.</i></p> <p><i>For example, the below Tableau Platform diagram also shows that the difference in Cloud and Server is a deployment choice. So, for our claim elements, there is no architectural or functionality difference.</i></p> <p>https://www.tableau.com/products/our-platform</p>
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<https://community.tableau.com/s/news/a0A4T000002fQt1UAE/tableau-cloud-vs-tableau-server-a-guide-on-how-to-compare-server-and-cloud>

What are the major differences between Tableau Online and Tableau Server

- **Tableau Online** is cloud based Software as a Service (SaaS). The hardware and systems that install and maintain Tableau Online are fully managed by Tableau. Upgrades and site backups are all handled by Tableau. Tableau Online sites get the latest product version with its new features as soon as it is available! There is no action required on the customer's side for upgrades and site backups. (For good practice we would recommend having backup copies of workbooks/data sources/flows in the event of accidental deletion by one of your users)
- **Tableau Server** is installed and maintained by the license holder. They are responsible for the hardware and processes to run Tableau Server. It can be installed inside or outside of a company firewall. Upgrades and backups are handled by you as the license holder. You would be responsible for planning and managing an upgrade and maintaining backups of your Tableau Server. Depending on your internal resources and deployment processes this may mean the version of Tableau

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	<p>Server you use day to day may lag behind what the latest version available is.</p> <p>https://help.tableau.com/current/blueprint/en-us/bp_server_architecture.htm</p> <p><u>Tableau Server</u></p> <p>Tableau Server provides a full modern analytics platform for your users. Tableau’s architecture is flexible, allowing you to run the platform just about anywhere. You can install Tableau Server on-premises, in your private cloud or data center, on Amazon EC2, Google Cloud Platform, MS Azure, or Alibaba Cloud. Tableau Server can also run on virtualization platforms.</p> <p>Multiple server processes work together to provide services in various tiers.To learn how the processes work together, see Tableau Server Processes on Tableau Public. Because Tableau Server integrates with a number of components in your IT infrastructure, it's important to understand how Tableau Server integrates with your IT infrastructure. For more information on processes, see Tableau Server Processes (Windows Linux). To learn more about Tableau Server processes as deployed in the reference architecture for the minimal enterprise-appropriate Tableau Server deployment, visit Part 2 of the Tableau Server Deployment Guide: Part 2 - Understanding the Tableau Server Deployment Reference Architecture.</p> <p><u>Tableau Cloud</u></p> <p>Tableau Cloud is a software-as-a-service (SaaS) deployment built to scale to serve thousands of sites with thousands of geographically distributed users within a multi-tenant (shared compute) environment. Tableau Cloud takes advantage of high availability features available in the product and cloud architecture best practices to deliver a reliable experience. Tableau Cloud supports a hybrid data architecture with a mix of networks, including on-premises, private cloud, and public cloud.</p>
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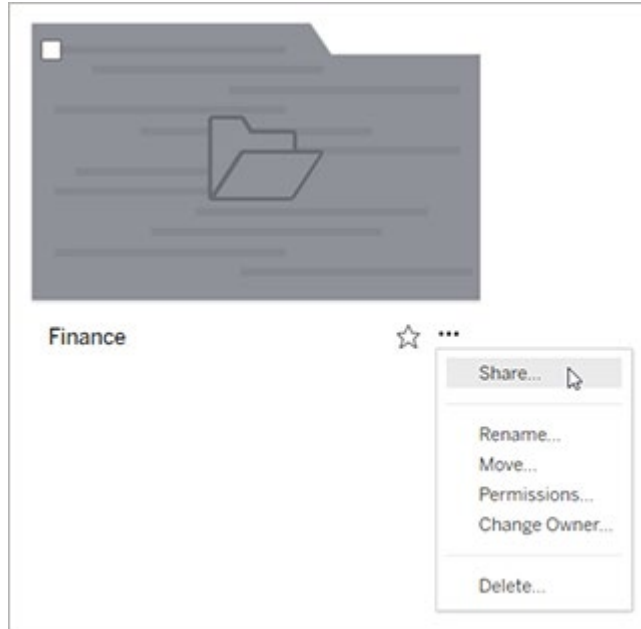
	<p><i>Tableau Cloud, Server, Or Desktop Example:</i> https://help.tableau.com/current/pro/desktop/en-us/buildmanual_dragging.htm</p> <p><u>Start Building a Visualization by Dragging Fields to the View</u></p> <p><i>Applies to: Tableau Cloud, Tableau Desktop, Tableau Server</i></p> <p>Then click on “Use Show Me to Start a View”: https://help.tableau.com/current/pro/desktop/en-us/buildauto_showme.htm</p> <p>Use Show Me to Start a View [...]</p> <p>Step 8: Share your findings</p> <p>You've done a bunch of work—great work—to learn that Burlington, North Carolina needs some fine tuning. Let's share this information with your teammates.</p> <p>Before you continue, select an option below:</p> <p>If you or your company does not use Tableau Server, or if you want to learn about a free, alternative sharing option, jump to Use Tableau Public.</p> <p>If you or your company uses Tableau Server, and you are familiar with what permissions are assigned to you, jump to Use Tableau Server.</p> <p><i>Share web content:</i> https://help.tableau.com/current/pro/desktop/en-us/shareworkbooks.htm</p> <p><u>Share Web Content</u></p> <p><i>Applies to: Tableau Cloud, Tableau Server</i></p> <p>Share projects, collections, workbooks, views, metrics, data sources, and flows either directly with other users or by copying a link to the content. For views and metrics, you can also copy code to embed them in a webpage. (The legacy Metrics feature was retired in February 2024 for Tableau Cloud and will be retired in Tableau Server version 2024.2. For more information, see Create and Troubleshoot Metrics (Retired).)Share directly with other users</p>
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When you share content directly with other users on your site, they receive a notification with a link to that content. The content is also added to their Shared with Me page, so they can easily find it later. Notifications can come by email, in Tableau’s in-app notifications center, or in the Tableau for Slack app if the site is connected to a Slack workspace. For more information, see [Manage Your Account Settings](#) and [Receive Notifications, Search, and Share Using the Tableau App for Slack](#).

1. Open the Actions (...) menu for the content you want to share.
2. Select **Share** from the menu.



3. Under **Share with people**, enter at least one user name. When you type, names that match your text appear.

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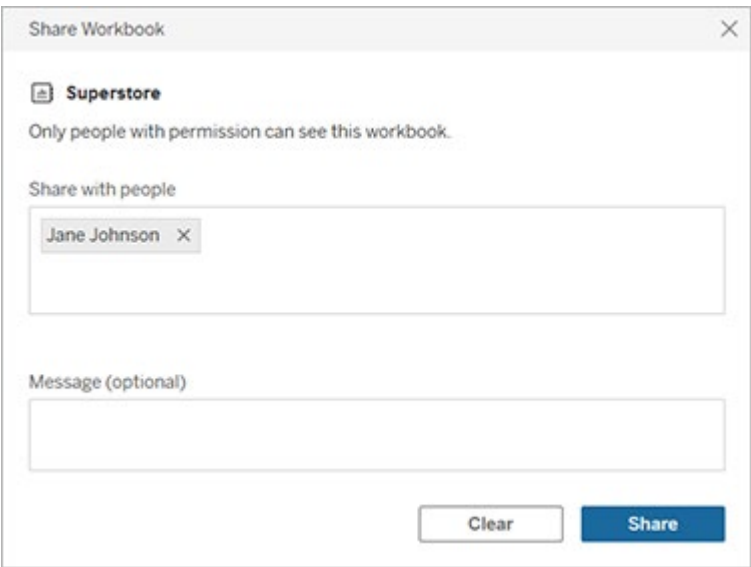
	<div data-bbox="656 310 1403 873"></div> <div data-bbox="605 905 1372 1003"><p>4. Under Message, enter an optional note to your recipients.</p><p>5. Click the Share button.</p></div> <div data-bbox="560 1037 943 1071"><p><u>Grant access to shared content</u></p></div> <div data-bbox="560 1102 1417 1171"><p>To access the content you share with them, users must have permission to view that content on Tableau Server or Tableau Cloud.</p></div> <div data-bbox="560 1203 1417 1409"><p>If you control permissions for the content, you can grant access when you share it. If any of the users you shared with don't have the ability to view the content, the option to grant access will appear automatically after you share. You can only grant the capabilities for the view template via the grant access dialog. To grant users other permission capabilities, follow the instructions on Set permissions.</p></div> <div data-bbox="560 1440 1417 1577"><p>If you don't have the ability to set permissions for the content, the users you share with will be able to request access upon opening the link to the shared content. Their request for access is sent to the user who controls permissions for the content.</p></div>
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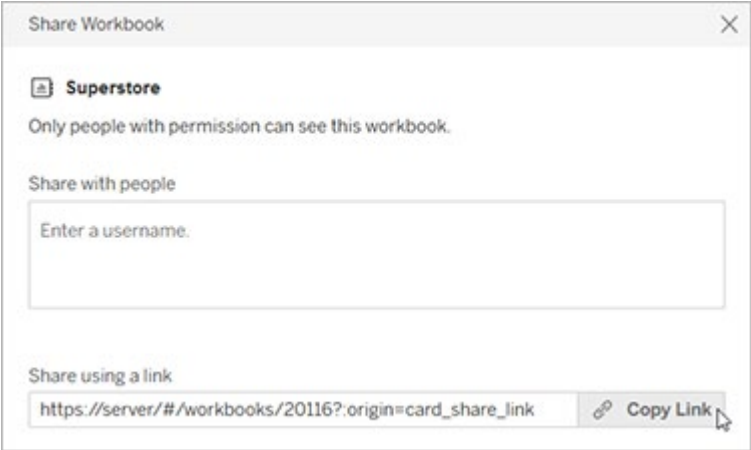
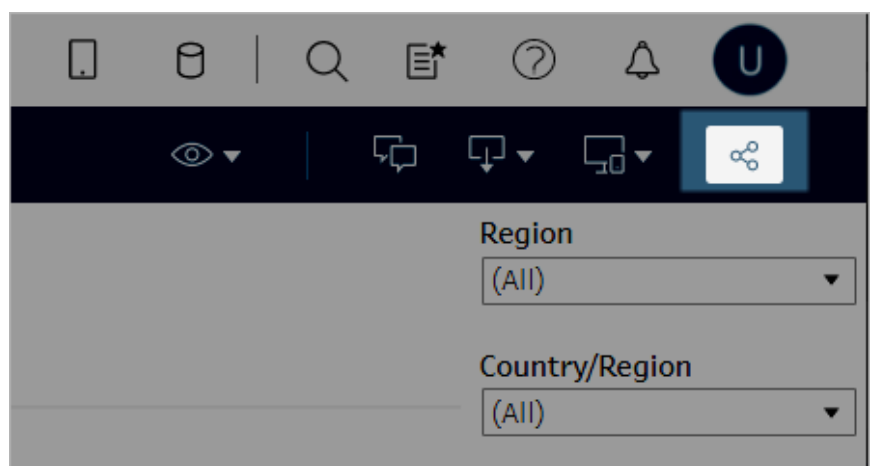
	<p>Copy a link to share</p> <p>Copy the link generated for a piece of content to share without sending an email to specific users.</p> <ol style="list-style-type: none">1. Open the Actions (...) menu for the content you want to share.2. Select Share from the menu.3. Click the Copy Link button, then paste the link into an application to share it with others.  <p>Tip: If you don't see the Sharing using a link option, clear any names from under Share with people.</p> <p><u>Share and embed views and metrics</u></p> <p>In addition to the sharing options listed above, views have unique options available when you click the Share button on the toolbar for a view. You can share a view that you have modified, and you can get the embed code for a view.</p>
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You can also embed metrics by copying the embed code from the share dialog.

Embed views and metrics

1. Click **Share** in the toolbar for the view you want to embed or on the metric you want to embed.
2. Click **Copy Embed Code**, then paste the embed code into the source code for the webpage where you want to embed the view.

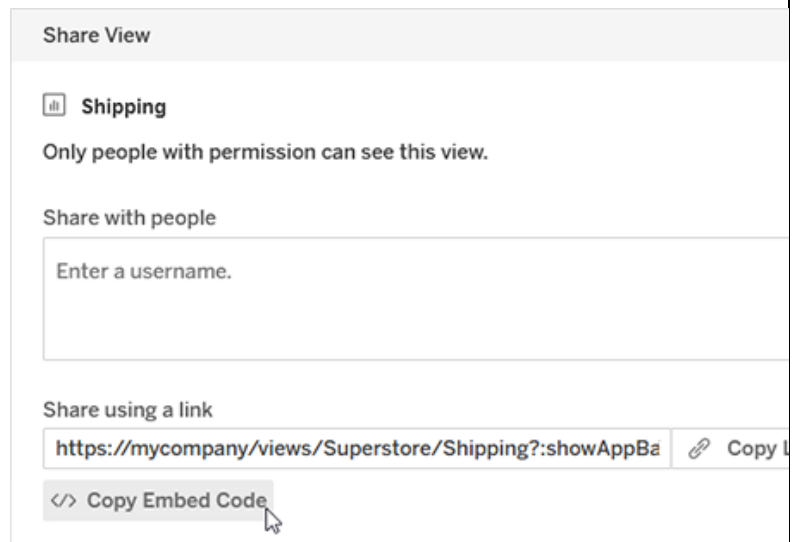


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For more information, see [Embed Views into Webpages](#) or [Embed Metrics into Webpages \(Retired\)](#).

Share modified or custom views

If you modify a view, by selecting marks or filters, Tableau captures these modifications by generating a unique link when you click the Share button. This unique link replaces the link to the original view for all sharing and embedding options. That way, the people you share with will see exactly what you were seeing when you shared.

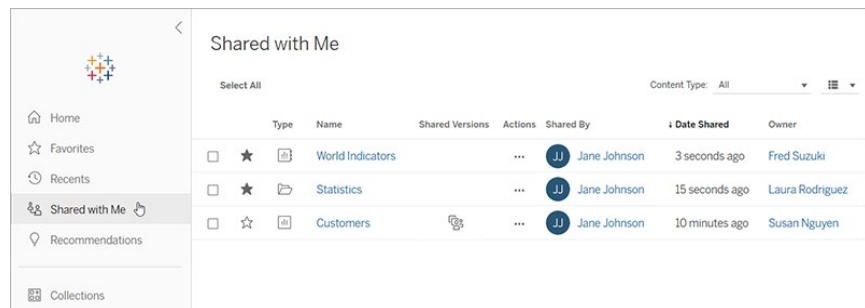
The link generated for a modified view expires two years after it was last accessed, or two years after it was created if never accessed.

To share a custom view that you have saved, simply open the custom view and use any sharing option.

Find content shared with you

You receive a notification message when someone shares content with you directly, either as an email, on your Tableau site by selecting the bell icon in the upper right corner, or in a connected Slack workspace with the Tableau for Slack app.

The Shared with Me page, accessed from the navigation pane, stores items that have been shared with you. The most recently shared items also appear in the Shared with Me channel on the Home page. Each item shows who it was shared by, the date it was shared, and any message added by the sharer.



Shared with Me						
Select All						
Content Type: All						
Type	Name	Shared Versions	Actions	Shared By	Date Shared	Owner
☐	★ World Indicators		...	Jane Johnson	3 seconds ago	Fred Suzuki
☐	★ Statistics		...	Jane Johnson	15 seconds ago	Laura Rodriguez
☐	☆ Customers		...	Jane Johnson	10 minutes ago	Susan Nguyen

Exhibit B

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If an item has been shared with you multiple times, the information shown is for the most recent share. Views include additional information if multiple versions of the view have been shared with you. Custom views, modified views, and the original view all appear with unique details and links under **Shared Versions**.

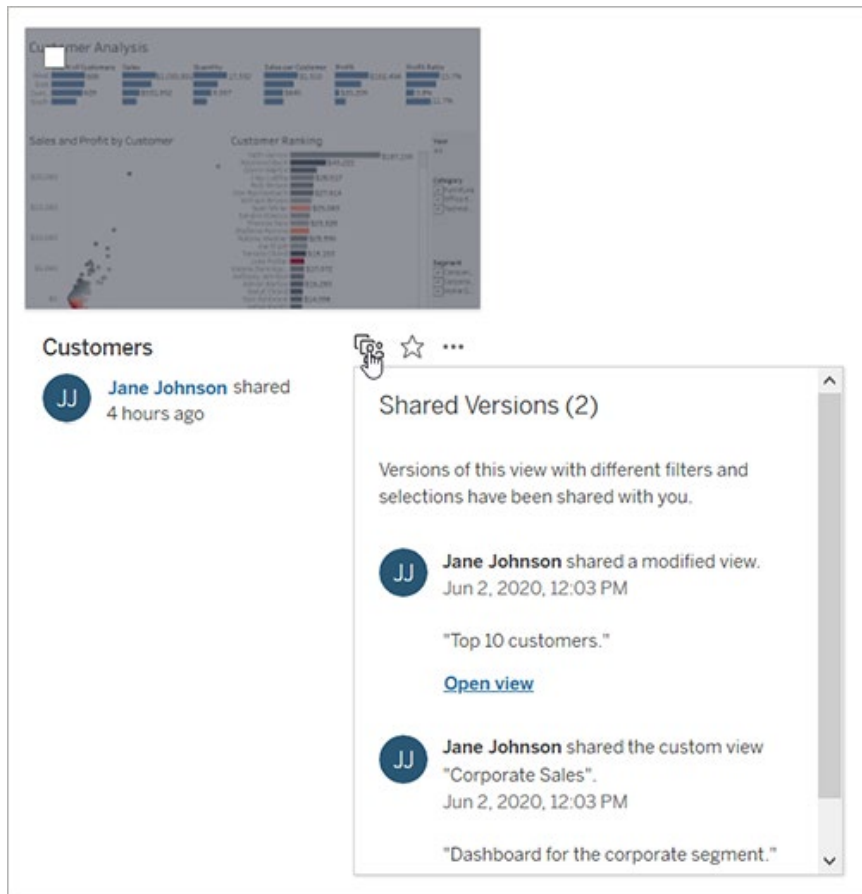


Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

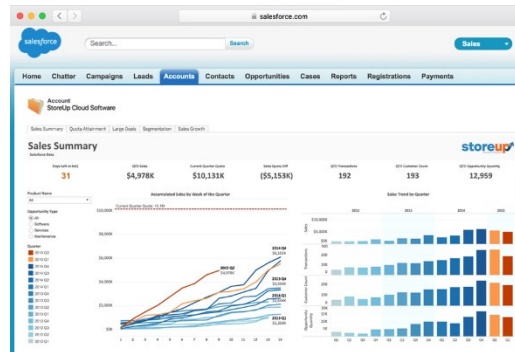
Share and collaborate in the cloud



Tableau Online is your analytics platform fully hosted in the cloud. **Publish dashboards and share your discoveries with anyone. Invite colleagues or customers** to explore hidden opportunities **with interactive visualizations and accurate data.** All easily accessible from a browser or on the go with our mobile apps.

[...]

Access anywhere. *embed* everywhere



Give external teams, partners, and clients simple and secure access to analytics, no virtual private networks required. Easily embed interactive dashboards on the web and within apps like Salesforce in just a few clicks.

[...]

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Empowering organizations with data

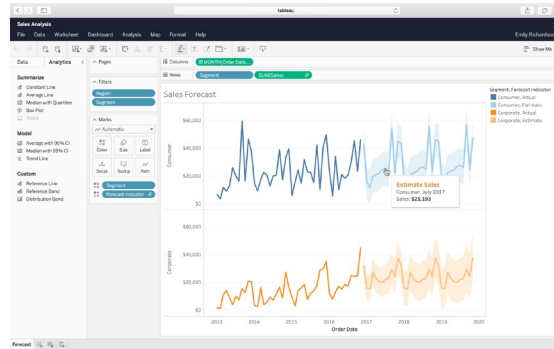


Tableau Online enables everyone in an organization to see and understand data, with offerings for every user type. Starting with casual users looking to make data driven decisions from a published dashboard, data enthusiasts who want to use web authoring to ask new questions from published data source, to data geeks who want to create and **share their vizzes and data sources with the rest of the organization**.

<https://www.tableau.com/products/cloud-bi>

Let everyone in on it



Ditch the static slides for **live stories that others can explore**. Create a compelling narrative that empowers everyone you work with to ask their own questions, analyzing interactive visualizations with fresh data. Be part of a culture of **data collaboration**, extending the impact of your insights.

[...]

Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

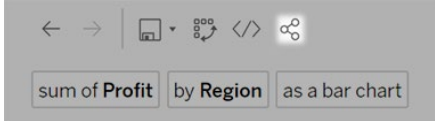
	<p><u>Sharing and collaborating securely</u></p> <p>Communicate with data in a whole new way. Share visualizations and underlying data securely using Tableau Server or Tableau Online. Create an environment where everyone in your organization can share and collaborate on trusted data.</p> <p>https://www.tableau.com/products/desktop</p> <p>Tableau Online is your analytics platform fully hosted in the cloud.</p> <p>[...]</p> <p><u>Data management</u></p> <p>Centralize access to your data in the cloud. Publish data models and make it easy for everyone to work from a curated, single source of truth.</p> <p>[...]</p> <p><u>Share in seconds</u></p> <p>Share a dashboard with a few clicks to start a conversation around data with your team. Comment and interact live on the web and on mobile devices.</p> <p>https://www.tableau.com/trial/tableau-online</p> <p><u>Share links to Ask Data vizzes</u></p> <p>You can quickly share Ask Data vizzes without even saving a sheet. Simply click the link icon above the query box, and copy a link viewable by anyone with access to the data source.</p>  <p><u>Embed Ask Data in a web page</u></p> <p>After you ask a question with Ask Data, an Embed Code icon appears in the toolbar. Click it to copy code you can incorporate into any web page.</p>
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Exhibit B

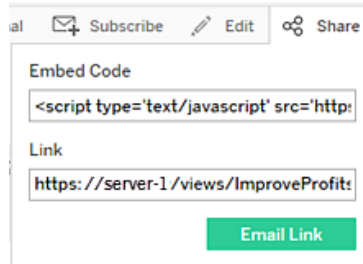
U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”



https://help.tableau.com/current/pro/desktop/en-us/ask_data.htm

Tableau Help > Tutorial: Get Started with Tableau Desktop > Step 8:
Share your findings with others [...]

3. From the menu, select Share.



4. How do you want to share your story?
 - a. **Embed on your website: Copy the Embed Code and paste it in your web page HTML.**
 - b. Send a link: Copy the Link and send to your colleagues.
 - c. Send an email using your default email client: Click the email icon.

<https://help.tableau.com/current/guides/get-started-tutorial/en-us/get-started-tutorial-share.htm>

Tableau Help > Tableau Desktop and Web Authoring Help > ... >
Embed Views and Dashboards > Embed Views into Webpages [...]

You can **embed interactive Tableau views and dashboards into web pages, blogs, wiki pages, web applications, and intranet portals**. Embedded views **update as the underlying data changes**, or as their workbooks are updated on Tableau Server or Tableau Online. [...]

Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

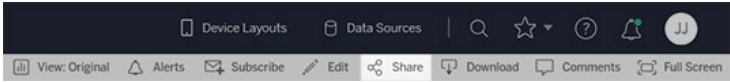
	<p>You can do the following to embed views and adjust their default appearance:</p> <ul style="list-style-type: none">• Get the embed code provided with a view: The Share button at the top of each view opens a dialog from which you can copy the embed code and paste into your webpage. (The Share button doesn't appear in embedded views if you change the showShareOptions parameter to false in the code.)  <ul style="list-style-type: none">• Customize the embed code: You can customize the embed code using parameters that control the toolbar, tabs, and more. For more information, see Parameters for Embed Code.• Use the Tableau JavaScript API: Web developers can use Tableau JavaScript objects in web applications. To get access to the API, documentation, code examples, and the Tableau developer community, see the Tableau Developer Portal. <p>https://help.tableau.com/current/pro/desktop/en-us/embed.htm</p> <p>Tableau Help > Tableau Desktop and Web Authoring Help > ... > Build Data Views from Scratch > Add Interactivity using Actions</p> <p>Actions [...]</p> <p>Add context and interactivity to your data using actions. Users interact with your visualizations by selecting marks, or hovering, or clicking a menu, and the actions you set up can respond with navigation and changes in the view.</p> <p>For example, in a dashboard showing home sales by neighborhood, you could use actions to display relevant information for a selected neighborhood. Selecting a neighborhood in one view can trigger an action that highlights the related houses in a map view, filters a list of the houses sold, then opens an external web page showing census data for the neighborhood. [...]</p>
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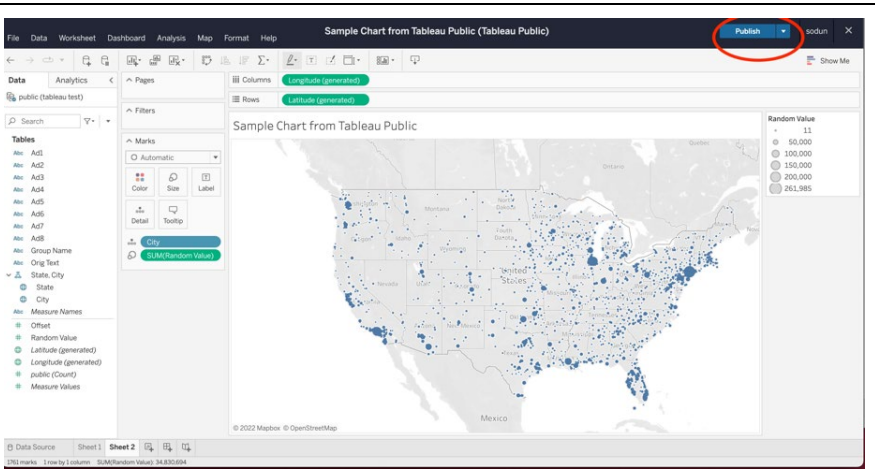
Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

	<p>Here's how you use the different types of actions:</p> <ul style="list-style-type: none">• Filter. Use the data from one view to filter data in another to help guide analysis.• Highlight. Call attention to marks of interest by coloring specific marks and dimming all others.• Go to URL. Create hyperlinks to external resources, such as a web page, file, or another Tableau worksheet.• Go to Sheet. Simplify navigation to other worksheets, dashboards, or stories.• Change Parameter. Let users change parameter values by directly interacting with marks on a viz.• Change Set Values. Let users change the values in a set by directly interacting with marks on a viz. <p>https://help.tableau.com/current/pro/desktop/en-us/actions.htm</p> <p>Tableau Public: https://public.tableau.com/app/discover</p> <p><u>Welcome to Tableau Public</u></p> <p>A free platform to explore, create, and publicly share data visualizations online.</p>
2. The system of claim 1, wherein the user interface includes a chart pane that displays the generated interactive chart.	<p><i>The user interface of claim 1 includes a chart pane that displays the generated interactive chart.</i></p> <p><i>See claim 1(pre)-1(d), for elements of claim 1.</i></p> <p><i>As shown below, the user interface displayed by Tableau Public includes a chart pane (e.g. the map of the US) as shown below.</i></p>

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Additionally, the user interface displayed by Tableau Public includes a data pane (e.g. the Data tab on the left of the image). When chart data has been dragged from the data pane and dropped into the chart pane, the chart is updated to include the data, as shown above.

Start Building a Visualization by Dragging Fields to the View

Applies to: Tableau Cloud, Tableau Desktop, Tableau Server

The basic structure for every view is made of dimension and measure fields placed on the Rows and Columns shelves, and on different properties in the Marks card.

You build visualizations by adding fields from the Data pane to the view. As you build a visualization, you can add as many fields as necessary to different areas of the view, and then move those fields around as you explore your data.

Different ways to start building a view

When you build a view, you add fields from the **Data** pane. You can do this in different ways. For example:

- Drag fields from the **Data** pane and drop them onto the cards and shelves that are part of every Tableau worksheet.
- Double-click one or more fields in the **Data** pane.
- Select one or more fields in the **Data** pane and then choose a chart type from **Show Me**, which identifies the chart types

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U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

that are appropriate for the fields you selected. For details, see [Use Show Me to Start a View](#) .

- Drop a field on the **Drop field here** grid, to start creating a view from a tabular perspective.



As you start exploring data in Tableau, you will find there are many ways to build a view. Tableau is extremely flexible, and also very forgiving. As you build a view, if you ever take a path that isn't answering your question, you can always undo to a previous point in your exploration.

- To undo or redo, click undo  or redo  on the toolbar.
- You can undo all the way back to the last time you opened the workbook. You can undo or redo an unlimited number of times.

Dragging basics

When you begin creating a new data view on a blank worksheet, you can drag a field from the **Data** pane and drop it directly into the view, rather than to a shelf.

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The screenshot shows the Tableau Desktop interface. On the left is the 'Data' pane with a search bar and a list of folders: 'Customer' (containing 'Customer Name' and 'Segment'), 'Order' (containing 'Location', 'Order Profitable?', 'Person', 'Product', 'Returned', and 'Ship Status'), and 'Parameters' (containing 'Base Salary'). The 'Marks' card is visible with options for 'Automatic', 'Color', 'Size', 'Text', 'Detail', and 'Tooltip'. The main view area is labeled 'Sheet 1' and contains four 'Drop field here' prompts arranged in a 2x2 grid.

In Tableau Desktop, while dragging fields, you can hover over the different areas in the view to see how the field will be incorporated into the structure of the view. For example, dimensions typically add a row and column headers to the view, while measures add continuous axes. Below are some examples of how fields can be added to the view.

Dimensions add headers	Measures add axes	Show Me automatically adds the field according to best practices
<p>The diagram shows a view with a blue header row and a blue header column. The top-left cell is empty, the top-right cell contains 'Drop field here', the bottom-left cell contains 'Drop field here', and the bottom-right cell contains 'Drop field here'.</p>		

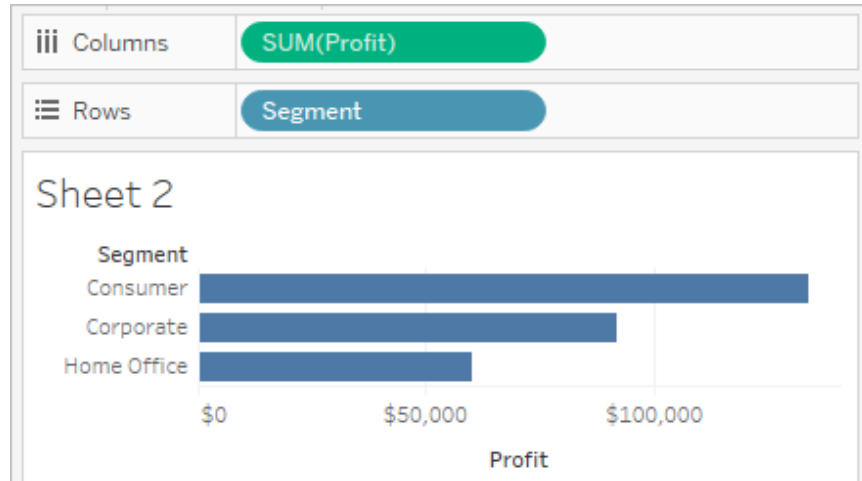
For a more advanced discussion of dimensions and measures, see [Dimensions and Measures, Blue and Green](#).

When you drop a field on one of the active areas in the view, the field is added to the view and also to one of the shelves or cards. For example, in the view below the **Segment** dimension was added to the **Rows** shelf and the **Profit** measure was added to the **Columns** shelf—

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U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

and automatically aggregated so that the values in the data are summed.



You can, of course, also drag fields directly to the shelves instead of to the active areas in the view. You can also drag fields from one shelf to another shelf. To remove a field from a shelf, drag it off the worksheet or select **Remove** from the field's menu (available when you right-click (control-click on Mac) a field in the view). In Tableau Desktop, you can also quickly remove multiple fields from a shelf by right-clicking (control-click on Mac) the shelf and selecting **Clear Shelf**.

Tableau Cloud, Server, Or Desktop Example:

https://help.tableau.com/current/pro/desktop/en-us/buildmanual_dragging.htm

Start Building a Visualization by Dragging Fields to the View

Applies to: Tableau Cloud, Tableau Desktop, Tableau Server

Then click on “Use Show Me to Start a View”:

https://help.tableau.com/current/pro/desktop/en-us/buildauto_showme.htm

Step 1: Start Building a Visualization by Dragging Fields to the View

Applies to: Tableau Cloud, Tableau Desktop, Tableau Server

Step 2: **Drag and drop** to take a first look [...]

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Create a view

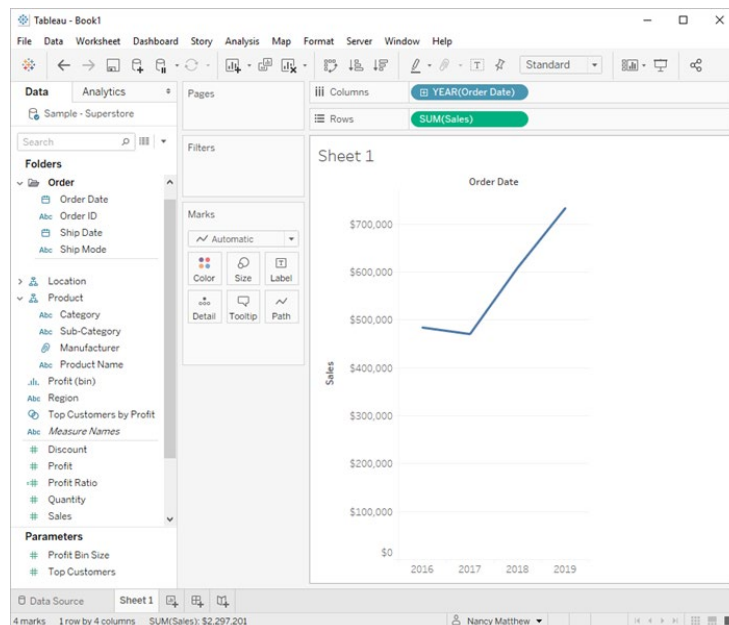
You set out to identify key areas for improvement, but where to start? With four years' worth of data, you decide to drill into the overall sales data to see what you find. Start by creating a simple chart. [...]

1. **From the Data pane, drag Order Date to the Columns shelf.**

Note: When you drag Order Date to the columns shelf, Tableau creates a column for each year in your data set. Under each column is an Abc indicator. This indicates that you can drag text or numerical data here, like what you might see in an Excel spreadsheet. If you were to drag Sales to this area, Tableau creates a crosstab (like a spreadsheet) and displays the sales totals for each year.

2. **From the Data pane, drag Sales to the Rows shelf.**

Tableau generates the following chart with sales rolled up as a sum (aggregated). You can see total **aggregated sales for each year by order date**.



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"Creation, sharing and embedding of interactive charts"

<https://help.tableau.com/current/guides/get-started-tutorial/en-us/get-started-tutorial-drag.htm>

Anyone can analyze data with **intuitive drag & drop products**. No programming, just insight.

Tableau Desktop [...]



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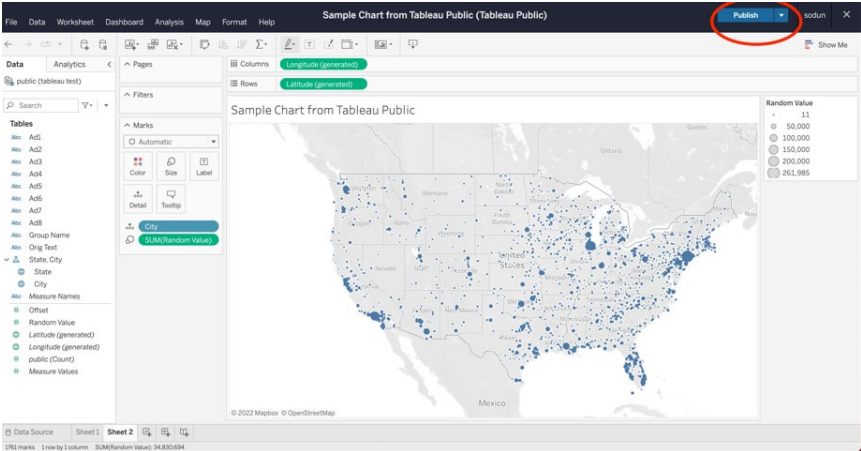
	<p><u>Answer deeper questions</u></p> <p>Exceptional analytics demand more than a pretty dashboard. Quickly build powerful calculations from existing data, drag and drop reference lines and forecasts, and review statistical summaries. Make your point with trend analyses, regressions, and correlations for tried and true statistical understanding. Ask new questions, spot trends, identify opportunities, and make data-driven decisions with confidence.</p> <p>https://www.tableau.com/products/desktop</p>
<p>3. The system of claim 2, wherein the user interface further includes a data pane that allows for the first user to drag the chart data from the data pane to the chart pane, wherein the interactive chart is generated after the chart data is dragged from the data pane to the chart pane.</p>	<p><i>The user interface of claim 1 further includes a data pane that allows for the first user to drag the chart data from the data pane to the chart pane, wherein the interactive chart is generated after the chart data is dragged from the data pane to the chart pane.</i></p> <p><i>See claim 1(pre)-1(d), for elements of claim 1.</i></p> <p><i>As shown below, the user interface displayed by Tableau Public includes a chart pane (e.g. the map of the US) as shown below.</i></p>  <p><i>Additionally, the user interface displayed by Tableau Public includes a data pane (e.g. the Data tab on the left of the image). When chart data has been dragged from the data pane and dropped into the chart pane, the chart is updated to include the data, as shown above.</i></p>

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	<p>Tableau Help > Tableau Desktop and Web Authoring Help > Build Charts and Analyze Data > Build Data Views From Scratch > Start Building a Visualization by Dragging Fields to the View: https://help.tableau.com/current/pro/desktop/en-us/buildmanual_dragging.htm</p> <p><u>Start Building a Visualization by Dragging Fields to the View</u></p> <p><i>Applies to: Tableau Cloud, Tableau Desktop, Tableau Server</i></p> <p>The basic structure for every view is made of dimension and measure fields placed on the Rows and Columns shelves, and on different properties in the Marks card.</p> <p>You build visualizations by adding fields from the Data pane to the view. As you build a visualization, you can add as many fields as necessary to different areas of the view, and then move those fields around as your explore your data.</p> <p><u>Different ways to start building a view</u></p> <p>When you build a view, you add fields from the Data pane. You can do this in different ways. For example:</p> <ul style="list-style-type: none">• Drag fields from the Data pane and drop them onto the cards and shelves that are part of every Tableau worksheet.• Double-click one or more fields in the Data pane.• Select one or more fields in the Data pane and then choose a chart type from Show Me, which identifies the chart types that are appropriate for the fields you selected. For details, see Use Show Me to Start a View .• Drop a field on the Drop field here grid, to start creating a view from a tabular perspective.
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Exhibit B

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As you start exploring data in Tableau, you will find there are many ways to build a view. Tableau is extremely flexible, and also very forgiving. As you build a view, if you ever take a path that isn't answering your question, you can always undo to a previous point in your exploration.

- To undo or redo, click undo ⬅ or redo ➡ on the toolbar.
- You can undo all the way back to the last time you opened the workbook. You can undo or redo an unlimited number of times.

Dragging basics

When you begin creating a new data view on a blank worksheet, you can drag a field from the **Data** pane and drop it directly into the view, rather than to a shelf.

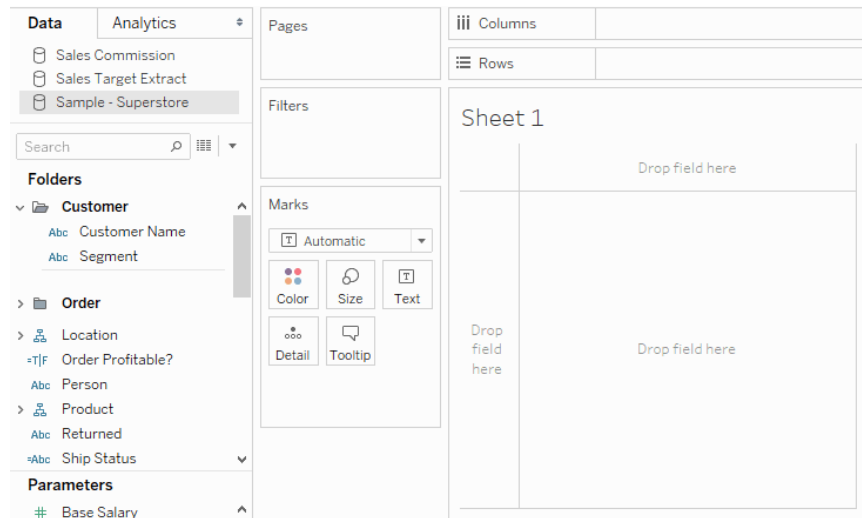


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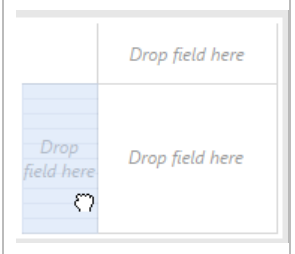
<p>In Tableau Desktop, while dragging fields, you can hover over the different areas in the view to see how the field will be incorporated into the structure of the view. For example, dimensions typically add a row and column headers to the view, while measures add continuous axes. Below are some examples of how fields can be added to the view.</p>		
Dimensions add headers	Measures add axes	Show Me automatically adds the field according to best practices
		
<p>For a more advanced discussion of dimensions and measures, see Dimensions and Measures, Blue and Green.</p> <p>When you drop a field on one of the active areas in the view, the field is added to the view and also to one of the shelves or cards. For example, in the view below the Segment dimension was added to the Rows shelf and the Profit measure was added to the Columns shelf—and automatically aggregated so that the values in the data are summed.</p>		

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U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

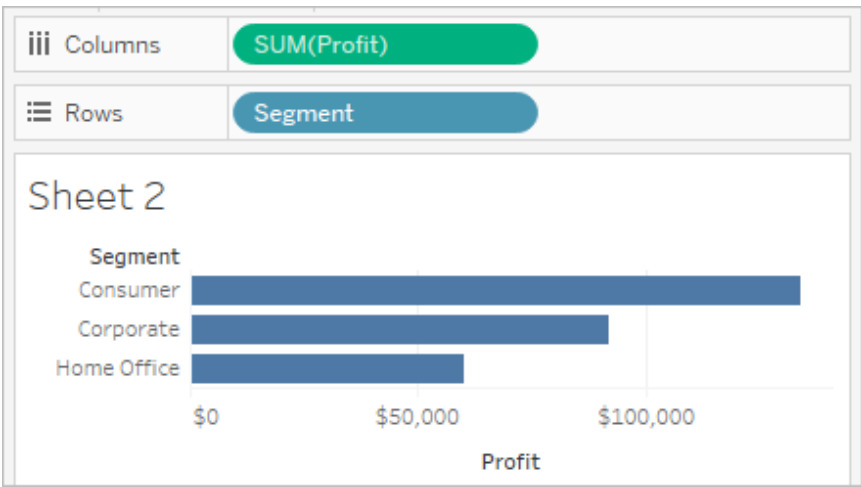
	<div data-bbox="560 310 1416 793"><table border="1"><thead><tr><th>Segment</th><th>Profit</th></tr></thead><tbody><tr><td>Consumer</td><td>\$125,000</td></tr><tr><td>Corporate</td><td>\$90,000</td></tr><tr><td>Home Office</td><td>\$60,000</td></tr></tbody></table></div> <p>You can, of course, also drag fields directly to the shelves instead of to the active areas in the view. You can also drag fields from one shelf to another shelf. To remove a field from a shelf, drag it off the worksheet or select Remove from the field's menu (available when you right-click (control-click on Mac) a field in the view. In Tableau Desktop, you can also quickly remove multiple fields from a shelf by right-clicking (control-click on Mac) the shelf and selecting Clear Shelf.</p> <p><i>Tableau Cloud, Server, Or Desktop Example:</i> https://help.tableau.com/current/pro/desktop/en-us/buildmanual_dragging.htm</p> <p><u>Start Building a Visualization by Dragging Fields to the View</u></p> <p><i>Applies to: Tableau Cloud, Tableau Desktop, Tableau Server</i></p> <p>Then click on “Use Show Me to Start a View”: https://help.tableau.com/current/pro/desktop/en-us/buildauto_showme.htm</p> <p>Step 1: Start Building a Visualization by Dragging Fields to the View</p> <p><i>Applies to: Tableau Cloud, Tableau Desktop, Tableau Server</i></p> <p>Step 2: Drag and drop to take a first look [...]</p>	Segment	Profit	Consumer	\$125,000	Corporate	\$90,000	Home Office	\$60,000
Segment	Profit								
Consumer	\$125,000								
Corporate	\$90,000								
Home Office	\$60,000								

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Create a view

You set out to identify key areas for improvement, but where to start? With four years' worth of data, you decide to drill into the overall sales data to see what you find. Start by creating a simple chart. [...]

1. **From the Data pane, drag Order Date to the Columns shelf.**

Note: When you drag Order Date to the columns shelf, Tableau creates a column for each year in your data set. Under each column is an Abc indicator. This indicates that you can drag text or numerical data here, like what you might see in an Excel spreadsheet. If you were to drag Sales to this area, Tableau creates a crosstab (like a spreadsheet) and displays the sales totals for each year.

2. **From the Data pane, drag Sales to the Rows shelf.**

Tableau generates the following chart with sales rolled up as a sum (aggregated). You can see total **aggregated sales for each year by order date**.

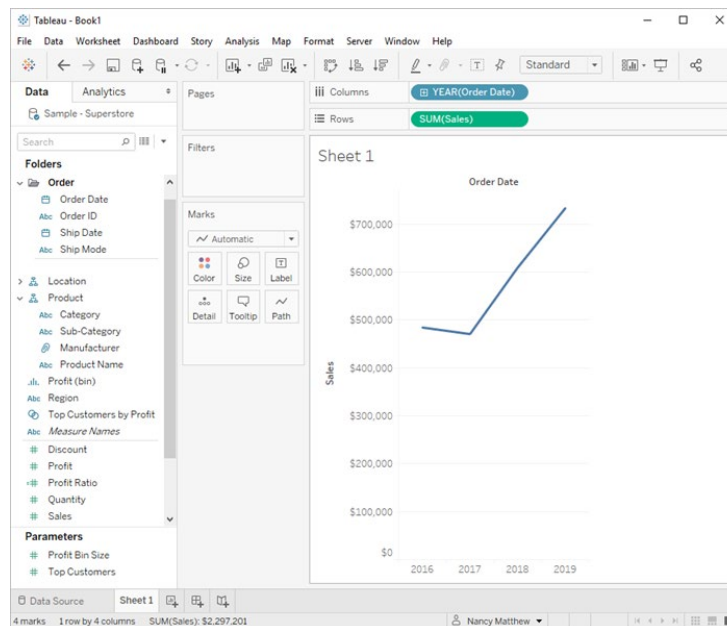


Exhibit B

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When you first you create a view that includes time (in this case Order Date), **Tableau** automatically generates a line chart.

<https://help.tableau.com/current/guides/get-started-tutorial/en-us/get-started-tutorial-drag.htm>

Ease of Use

Anyone can analyze data with **intuitive drag & drop products**. No programming, just insight.

<https://www.tableau.com/trial/tableau-software>

Tableau Desktop [...]

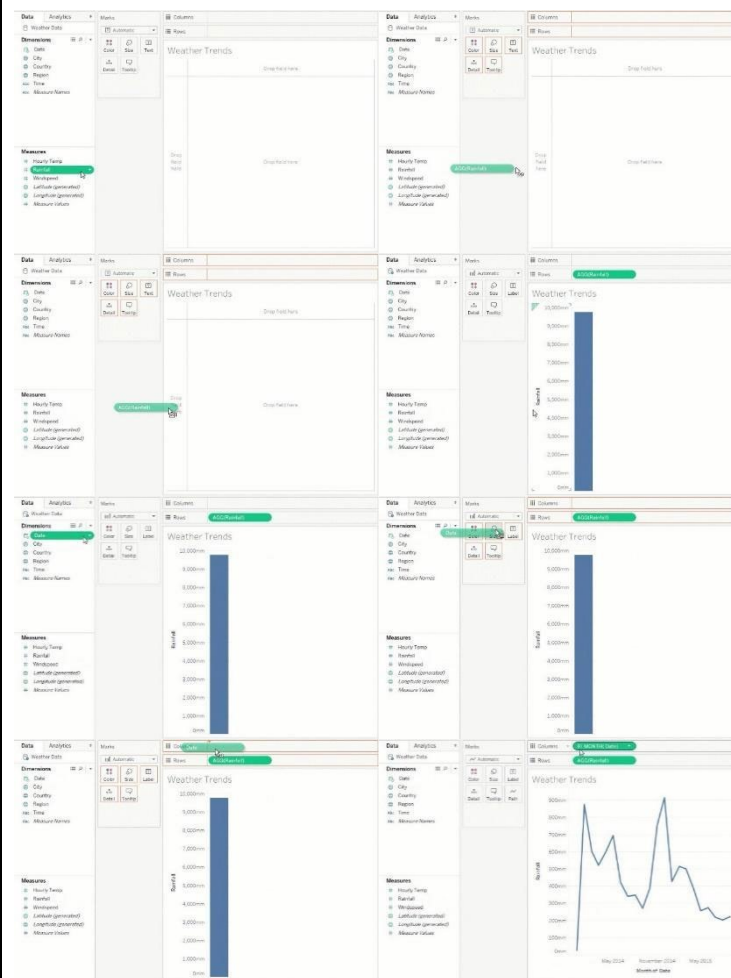


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	<p><u>Answer deeper questions</u></p> <p>Exceptional analytics demand more than a pretty dashboard. Quickly build powerful calculations from existing data, drag and drop reference lines and forecasts, and review statistical summaries. Make your point with trend analyses, regressions, and correlations for tried and true statistical understanding. Ask new questions, spot trends, identify opportunities, and make data-driven decisions with confidence.</p> <p>https://www.tableau.com/products/desktop</p>
4. The system of claim 1, wherein the interactive chart retains one or more interactive features when displayed via the second website.	<p><i>The interactive chart of claim 1 retains one or more interactive features when displayed via the second website.</i></p> <p><i>See claim 1(pre)-1(d), for elements of claim 1.</i></p> <p>https://www.tableau.com/learn/articles/interactive-map-and-data-visualization-examples (10 examples of interactive map data visualizations)</p> <p>Tableau Help > Tableau Desktop and Web Authoring Help > Build Charts and Analyze Data > Explore and Inspect Data in a View</p> <p>https://help.tableau.com/current/pro/desktop/en-us/data_explore_analyze_interact.htm</p> <p><u>Explore and Inspect Data in a View</u></p> <p><i>Applies to: Tableau Cloud, Tableau Desktop, Tableau Server</i></p> <p>When you are ready to explore and analyze your view, Tableau offers a selection of dynamic data inspection tools that help you isolate the data of interest. For example, if you have a dense data view, you can focus on a particular region, select a group of outliers, and view the underlying data source rows for each mark.</p> <p><u>Select marks to highlight data points in the view</u></p> <p>The simplest way to add highlighting to a view is to select the marks you want to highlight. When you manually select a mark in the view, all other marks are dimmed to draw attention to the selection. Your selection is saved with the workbook.</p>

Exhibit B

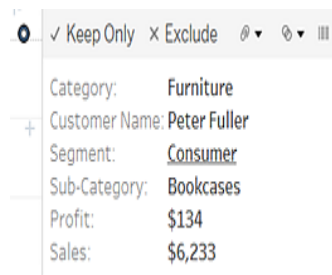
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For more information on how to **use selection tools**, see [Select marks](#)(Link opens in a new window). Also see [Legend Highlighting](#)(Link opens in a new window), [Highlight Data Points in Context](#)(Link opens in a new window), [Highlight Toolbar Button](#)(Link opens in a new window), and [Highlight Actions](#).

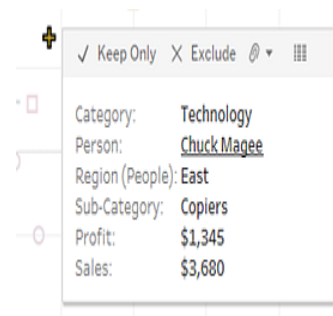
Analyze selected marks using tooltips

When you select one or multiple marks in a view, and then continue to hover in the same spot, several options for inspecting your data are available in the tooltip.

Tableau Desktop version



Web version



Tooltips provide additional information about the marks in your view, and provide the following data analysis options:

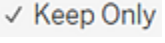
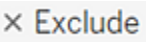
- Keep only the selected marks in the view.  For more information, see [Select to keep or exclude data points in your view](#)
- Exclude the selected marks from the view.  For more information, see [Select to keep or exclude data points in your view](#)
- [\(Link opens in a new window\)](#)
- Create a group based on the selected marks.  For more information, see [Correct Data Errors or Combine Dimension Members by Grouping Your Data](#)

Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

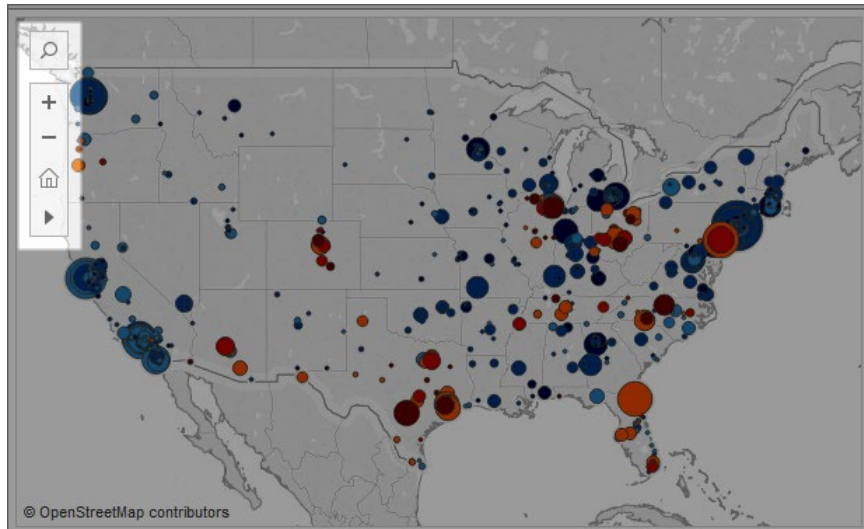
- Create a set that contains the selected marks (Tableau Desktop only).  For more information, see [Create Sets](#)
- View the underlying data of the marks selected.  For more information, see [View Underlying Data](#)

For related information on Tooltips, see [Tooltips](#).

For details on related analysis tools, see [Zoom and Pan Views](#), and [Select Marks](#), [Undo and Redo](#), and [Drop Lines](#).

Explore data in maps

Tableau maps can help you quickly find locations and analyze data worldwide. There are many ways you can explore and interact with map views. You can zoom in and out, pan, and select marks with the view toolbar, and even search for locations worldwide with map search.



For more details, see [Explore Data in Maps](#), [Search for Locations in Your Map](#), and [Measure Distances Between Data Points and Locations in a Map](#).

https://help.tableau.com/current/pro/desktop/en-us/view_parts.htm

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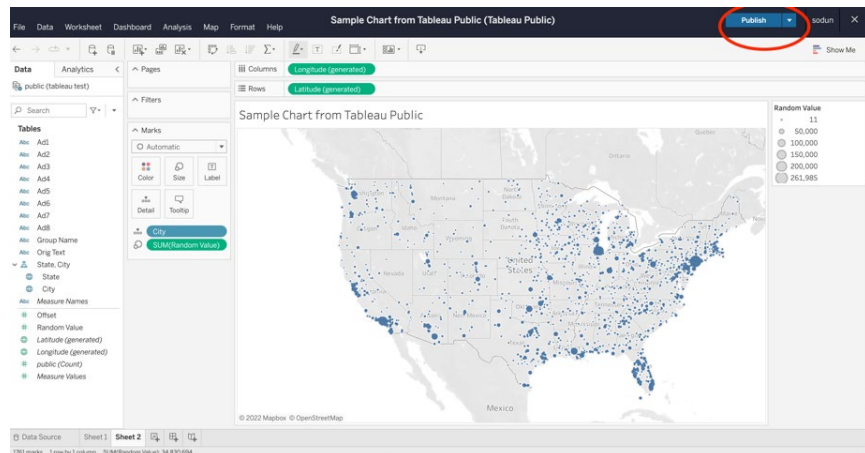
Parts of the View

Applies to: Tableau Desktop

This section describes the basic elements of views that you can create in Tableau. You can show or hide parts of the view as needed (described below). Every view has a table in some form, which may include rows, columns, headers, axes, panes, cells, and marks. Views can optionally include tooltips, titles, captions, field labels, and legends.

Tableau Accused Products allow ‘publishing’ charts using either Tableau Public, Tableau Server, or Tableau Cloud. A user’s license determines what they have access to. Tableau Public is available for free. Tableau Platform provides several user interfaces, e.g., Tableau browser UI or Tableau Desktop UI that is webbased, to invoke the sharing module’s capabilities.

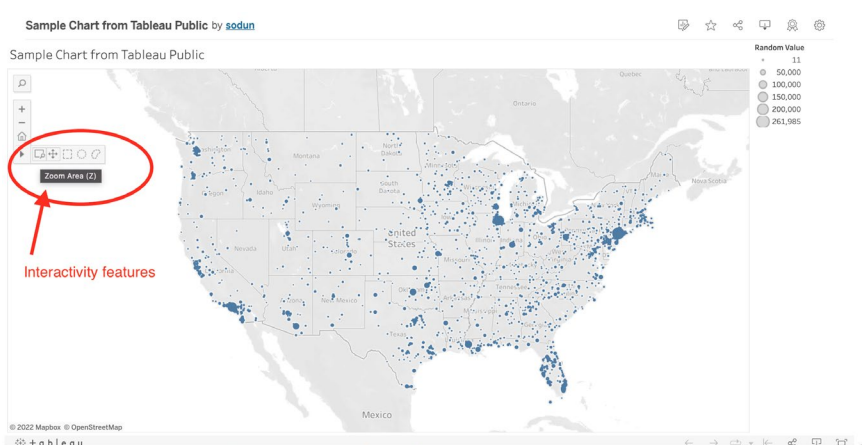
*As shown below the **interactive chart** created in the example below can be published by clicking on the “**Publish**” button shown below using Tableau Public.*



*The “**published**” interactive chart is shown below as seen on a second website.*

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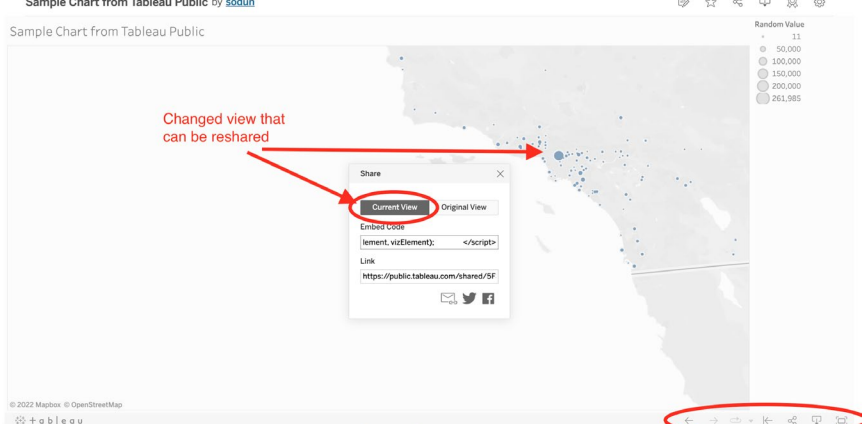


Sample Chart from Tableau Public by [sodun](#)

Sample Chart from Tableau Public

Interactivity features

By selecting a zoom function (as shown above), the published **interactive chart** can be **modified without using the user interface** on the first website, as shown below. Thus, the second website receives an input from a second user and updates the interactive chart after the second website receives the input.



Sample Chart from Tableau Public by [sodun](#)

Sample Chart from Tableau Public

Changed view that can be reshared

The operation of the Tableau Platform was further verified by inspecting the code transmitted between the two websites to confirm that the re-rendering of the chart shown above is performed entirely by code executed on the client computer and the second website for display, without the execution of the instructions stored in the memory to generate the user interface of the first website.

Sample code (the first part in red is the viz ID which identifies the particular visualization object on the Tableau Public server. The visualization object is the meta-data-file containing all relevant meta-

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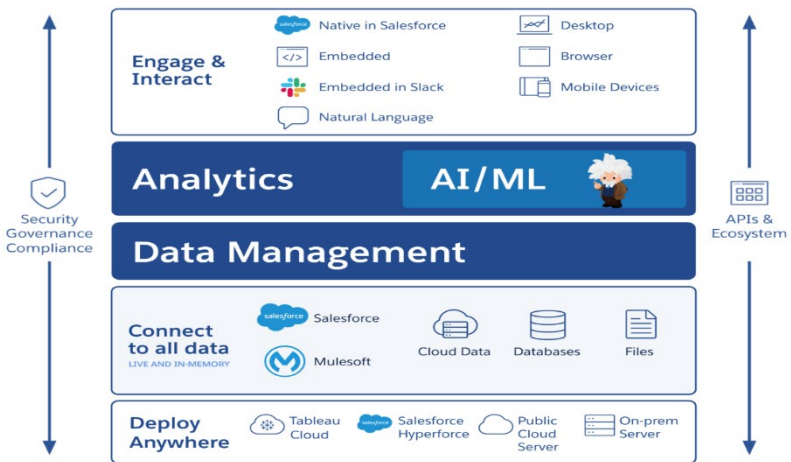
	<p><i>data. The second part in red is the actual code that gets pulled into the web page in real-time when the page is opened. The code then pulls in the meta-data, renders the charts and processes all interactivity commands):</i></p> <pre>----- <div class='tableauPlaceholder' id='viz1645577202124' style='position: relative'><noscript></noscript><object class='tableauViz' style='display:none;'><param name='host_url' value='https%3A%2F%2Fpublic.tableau.com%2F' /> <param name='embed_code_version' value='3' /> <param name='path' value='shared&Y8BRZW9G5' /> <param name='toolbar' value='yes' /><param name='static_image' value='Y8&Y8BRZW9G5&1.png' /> <param name='animate_transition' value='yes' /><param name='display_static_image' value='yes' /><param name='display_spinner' value='yes' /><param name='display_overlay' value='yes' /><param name='display_count' value='yes' /><param name='tabs' value='no' /></object></div> <script type='text/javascript'> var divElement = document.getElementById('viz1645577202124'); var vizElement = divElement.getElementsByTagName('object')[0]; vizElement.style.width='1000px';vizElement.style.height='1027px'; var scriptElement = document.createElement('script'); scriptElement.src = 'https://public.tableau.com/javascripts/api/viz_v1.js'; vizElement.parentNode.insertBefore(scriptElement, vizElement); </script> -----</pre> <p><i>Tableau Cloud and Tableau Server operate in substantially the same way as Tableau Public in allowing users to “publish” or embed interactive charts as self-contained and independent electronic documents that can be opened in a program and re-rendered based on user input as a perimeter in the absence of the generation module and the chart template module, enabling the interactive chart to retain interactivity when published or embedded.</i></p>
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For example, the below Tableau Platform diagram also shows that the difference in Cloud and Server is a deployment choice. So, for our claim elements, there is no architectural or functionality difference.

<https://www.tableau.com/products/our-platform>



<https://community.tableau.com/s/news/a0A4T000002fQt1UAE/tableau-cloud-vs-tableau-server-a-guide-on-how-to-compare-server-and-cloud>

What are the major differences between Tableau Online and Tableau Server

- **Tableau Online** is cloud based Software as a Service (SaaS). The hardware and systems that install and maintain Tableau Online are fully managed by Tableau. Upgrades and site backups are all handled by Tableau. Tableau Online sites get the latest product version with its new features as soon as it is available! There is no action required on the customer's side for upgrades and site backups. (For good practice we would recommend having backup copies of workbooks/data sources/flows in the event of accidental deletion by one of your users)

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	<ul style="list-style-type: none">• Tableau Server is installed and maintained by the license holder. They are responsible for the hardware and processes to run Tableau Server. It can be installed inside or outside of a company firewall. Upgrades and backups are handled by you as the license holder. You would be responsible for planning and managing an upgrade and maintaining backups of your Tableau Server. Depending on your internal resources and deployment processes this may mean the version of Tableau Server you use day to day may lag behind what the latest version available is. <p>https://help.tableau.com/current/blueprint/en-us/bp_server_architecture.htm</p> <p><u>Tableau Server</u></p> <p>Tableau Server provides a full modern analytics platform for your users. Tableau’s architecture is flexible, allowing you to run the platform just about anywhere. You can install Tableau Server on-premises, in your private cloud or data center, on Amazon EC2, Google Cloud Platform, MS Azure, or Alibaba Cloud. Tableau Server can also run on virtualization platforms.</p> <p>Multiple server processes work together to provide services in various tiers. To learn how the processes work together, see Tableau Server Processes on Tableau Public. Because Tableau Server integrates with a number of components in your IT infrastructure, it's important to understand how Tableau Server integrates with your IT infrastructure. For more information on processes, see Tableau Server Processes (Windows Linux). To learn more about Tableau Server processes as deployed in the reference architecture for the minimal enterprise-appropriate Tableau Server deployment, visit Part 2 of the Tableau Server Deployment Guide: Part 2 - Understanding the Tableau Server Deployment Reference Architecture.</p> <p><u>Tableau Cloud</u></p> <p>Tableau Cloud is a software-as-a-service (SaaS) deployment built to scale to serve thousands of sites with thousands of geographically distributed users within a multi-tenant (shared compute) environment. Tableau Cloud takes advantage of high availability features available in the product and cloud architecture best practices to deliver a reliable experience. Tableau Cloud supports a hybrid data</p>
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	<p>architecture with a mix of networks, including on-premises, private cloud, and public cloud.</p> <p>Tableau Cloud, Server, Or Desktop Example: https://help.tableau.com/current/pro/desktop/en-us/buildmanual_dragging.htm</p> <p><u>Start Building a Visualization by Dragging Fields to the View</u></p> <p><i>Applies to: Tableau Cloud, Tableau Desktop, Tableau Server</i></p> <p>Then click on “Use Show Me to Start a View”: https://help.tableau.com/current/pro/desktop/en-us/buildauto_showme.htm</p> <p>Use Show Me to Start a View [...]</p> <p>Step 8: Share your findings</p> <p>You've done a bunch of work—great work—to learn that Burlington, North Carolina needs some fine tuning. Let's share this information with your teammates.</p> <p>Before you continue, select an option below:</p> <p>If you or your company does not use Tableau Server, or if you want to learn about a free, alternative sharing option, jump to Use Tableau Public.</p> <p>If you or your company uses Tableau Server, and you are familiar with what permissions are assigned to you, jump to Use Tableau Server.</p> <p>Share web content: https://help.tableau.com/current/pro/desktop/en-us/shareworkbooks.htm</p> <p><u>Share Web Content</u></p> <p><i>Applies to: Tableau Cloud, Tableau Server</i></p> <p>Share projects, collections, workbooks, views, metrics, data sources, and flows either directly with other users or by copying a link to the content. For views and metrics, you can also copy code to embed them in a webpage. (The legacy Metrics feature was retired in February 2024 for Tableau Cloud and will be retired in Tableau Server version</p>
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U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

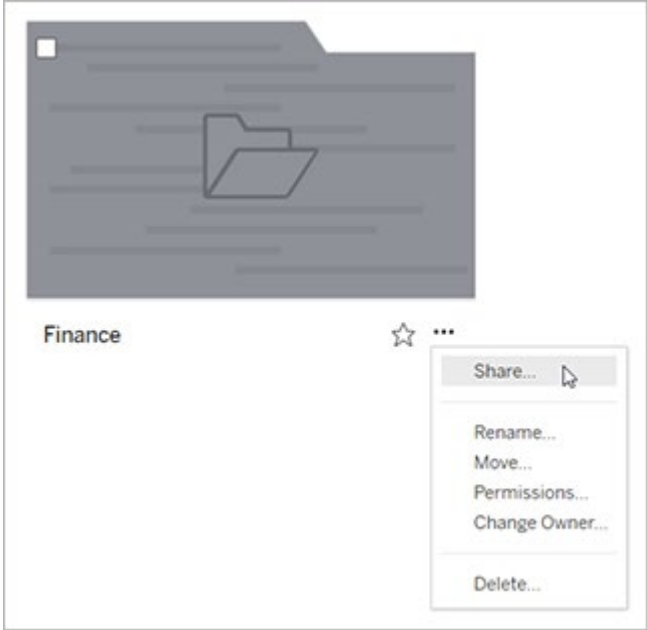
	<p>2024.2. For more information, see Create and Troubleshoot Metrics (Retired).)</p> <p><u>Share directly with other users</u></p> <p>When you share content directly with other users on your site, they receive a notification with a link to that content. The content is also added to their Shared with Me page, so they can easily find it later. Notifications can come by email, in Tableau’s in-app notifications center, or in the Tableau for Slack app if the site is connected to a Slack workspace. For more information, see Manage Your Account Settings and Receive Notifications, Search, and Share Using the Tableau App for Slack.</p> <ol style="list-style-type: none">1. Open the Actions (...) menu for the content you want to share.2. Select Share from the menu.  <p>3. Under Share with people, enter at least one user name. When you type, names that match your text appear.</p>
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U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

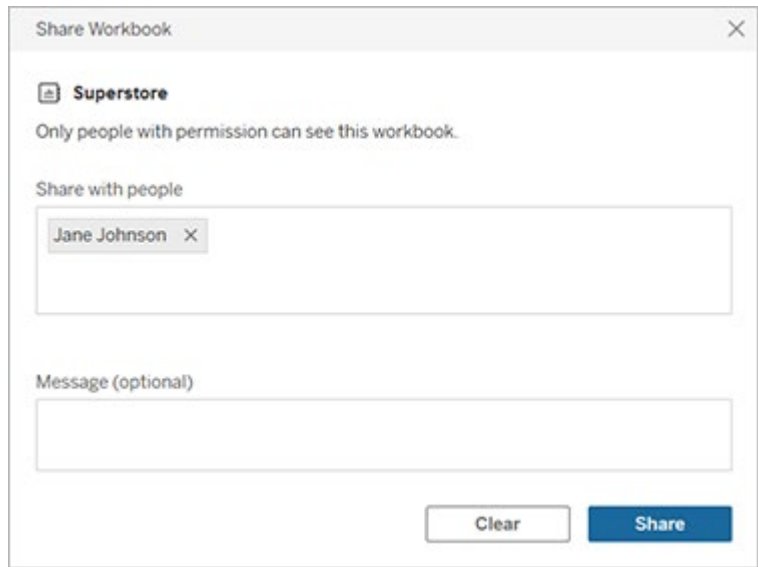
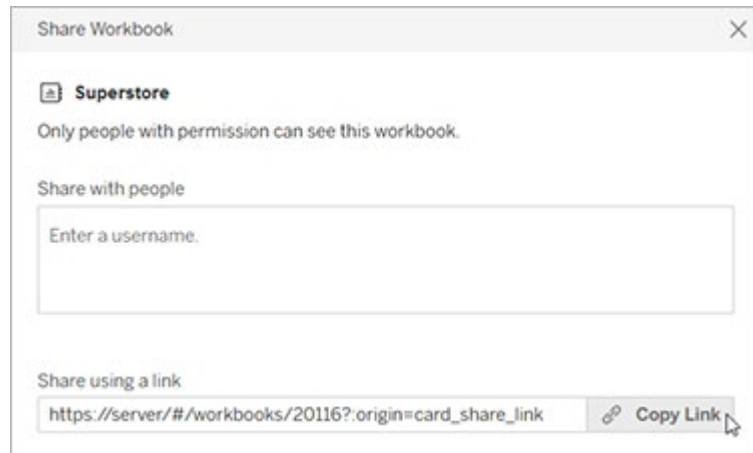
	<div data-bbox="649 310 1403 873"></div> <div data-bbox="592 890 1382 989"><ol style="list-style-type: none">4. Under Message, enter an optional note to your recipients.5. Click the Share button.</div> <div data-bbox="552 1039 943 1071"><p><u>Grant access to shared content</u></p></div> <div data-bbox="552 1104 1427 1171"><p>To access the content you share with them, users must have permission to view that content on Tableau Server or Tableau Cloud.</p></div> <div data-bbox="552 1203 1430 1409"><p>If you control permissions for the content, you can grant access when you share it. If any of the users you shared with don't have the ability to view the content, the option to grant access will appear automatically after you share. You can only grant the capabilities for the view template via the grant access dialog. To grant users other permission capabilities, follow the instructions on Set permissions.</p></div> <div data-bbox="552 1440 1430 1577"><p>If you don't have the ability to set permissions for the content, the users you share with will be able to request access upon opening the link to the shared content. Their request for access is sent to the user who controls permissions for the content.</p></div> <div data-bbox="552 1610 807 1642"><p><u>Copy a link to share</u></p></div> <div data-bbox="552 1675 1427 1743"><p>Copy the link generated for a piece of content to share without sending an email to specific users.</p></div>
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1. Open the Actions (...) menu for the content you want to share.
2. Select **Share** from the menu.
3. Click the **Copy Link** button, then paste the link into an application to share it with others.



Tip: If you don't see the **Sharing using a link** option, clear any names from under **Share with people**.

Share and embed views and metrics

In addition to the sharing options listed above, views have unique options available when you click the Share button on the toolbar for a view. You can share a view that you have modified, and you can get the embed code for a view.

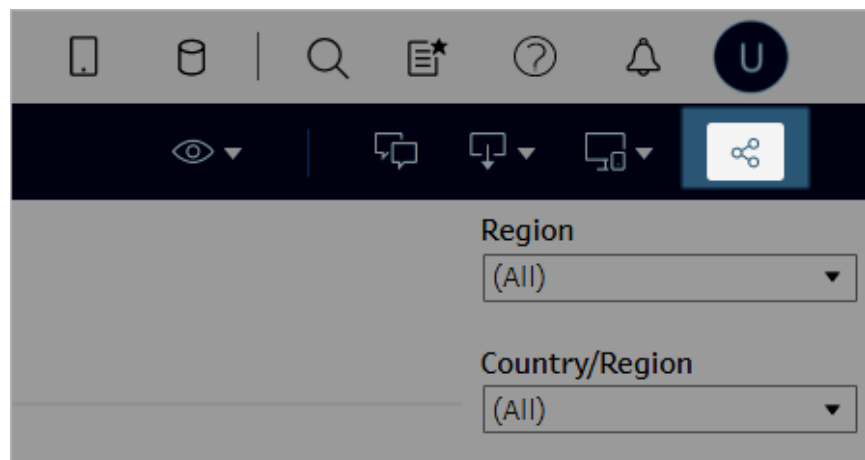


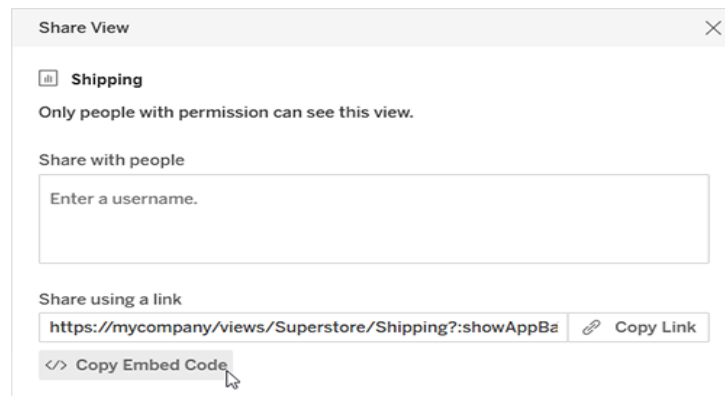
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You can also embed metrics by copying the embed code from the share dialog.

Embed views and metrics

1. Click **Share** in the toolbar for the view you want to embed or on the metric you want to embed.
2. Click **Copy Embed Code**, then paste the embed code into the source code for the webpage where you want to embed the view.



For more information, see [Embed Views into Webpages](#) or [Embed Metrics into Webpages \(Retired\)](#).

Share modified or custom views

If you modify a view, by selecting marks or filters, Tableau captures these modifications by generating a unique link when you click the Share button. This unique link replaces the link to the original view for all sharing and embedding options. That way, the people you share with will see exactly what you were seeing when you shared.

The link generated for a modified view expires two years after it was last accessed, or two years after it was created if never accessed.

To share a custom view that you have saved, simply open the custom view and use any sharing option.

Find content shared with you

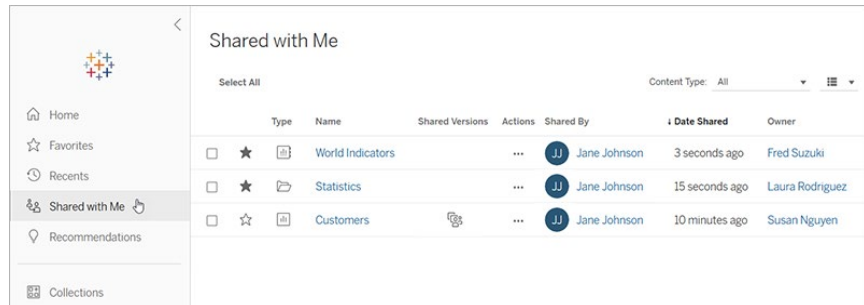
You receive a notification message when someone shares content with you directly, either as an email, on your Tableau site by selecting

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the bell icon in the upper right corner, or in a connected Slack workspace with the Tableau for Slack app.

The Shared with Me page, accessed from the navigation pane, stores items that have been shared with you. The most recently shared items also appear in the Shared with Me channel on the Home page. Each item shows who it was shared by, the date it was shared, and any message added by the sharer.

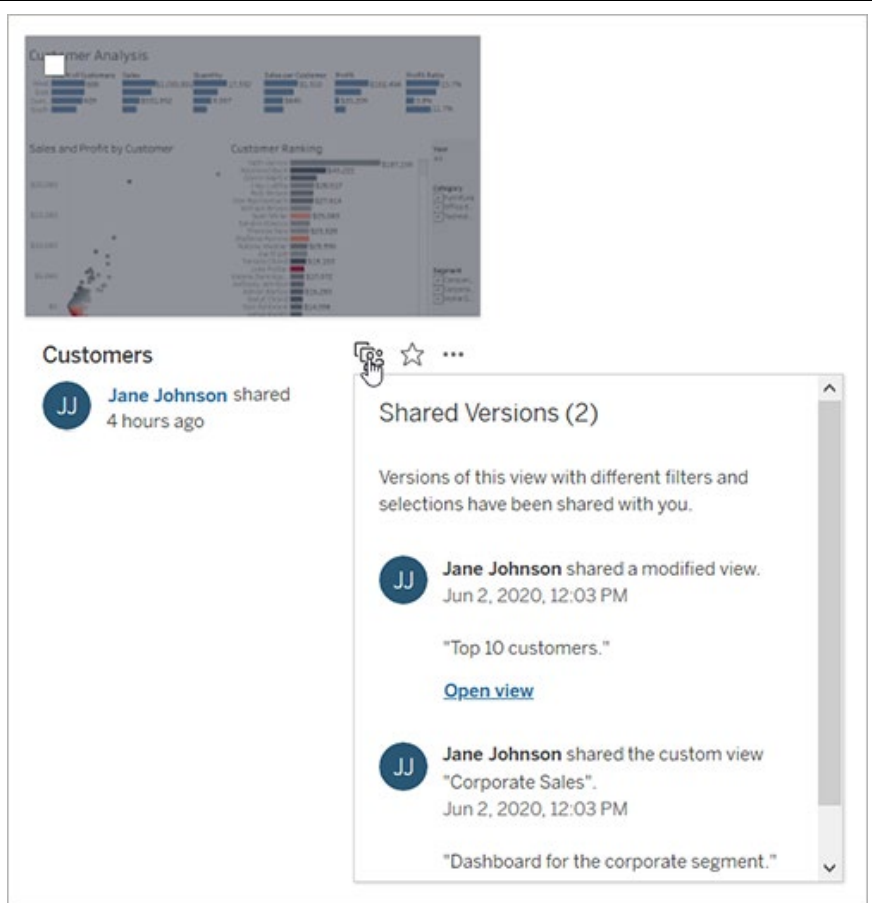


Shared with Me						
Select All						
Content Type: All						
Type	Name	Shared Versions	Actions	Shared By	Date Shared	Owner
☐	★  World Indicators	...		 Jane Johnson	3 seconds ago	Fred Suzuki
☐	★  Statistics	...		 Jane Johnson	15 seconds ago	Laura Rodriguez
☐	☆  Customers			 Jane Johnson	10 minutes ago	Susan Nguyen

If an item has been shared with you multiple times, the information shown is for the most recent share. Views include additional information if multiple versions of the view have been shared with you. Custom views, modified views, and the original view all appear with unique details and links under **Shared Versions**.

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Share and collaborate in the cloud



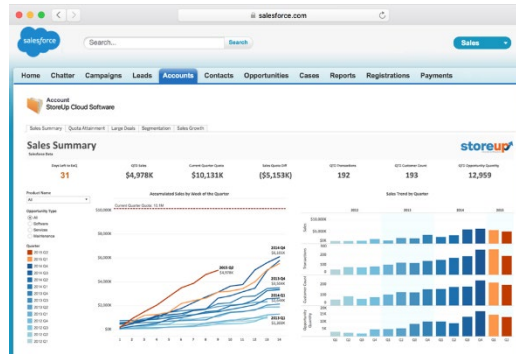
Tableau Online is your analytics platform fully hosted in the cloud. **Publish dashboards and share your discoveries with anyone. Invite colleagues or customers** to explore hidden opportunities **with interactive visualizations and accurate data.** All easily accessible from a browser or on the go with our mobile apps.

[...]

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Access anywhere, *embed* everywhere



Give external teams, partners, and clients simple and secure access to analytics, no virtual private networks required. Easily embed interactive dashboards on the web and within apps like Salesforce in just a few clicks.

[...]

Empowering organizations with data

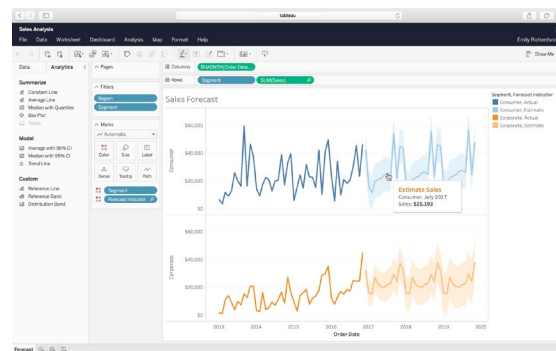


Tableau Online enables everyone in an organization to see and understand data, with offerings for every user type. Starting with casual users looking to make data driven decisions from a published dashboard, data enthusiasts who want to use web authoring to ask new questions from published data source, to data geeks who want to create and **share their vizzes and data sources with the rest of the organization.**

<https://www.tableau.com/products/cloud-bi>

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Let everyone in on it



Ditch the static slides for **live stories that others can explore**. Create a compelling narrative that empowers everyone you work with to ask their own questions, analyzing interactive visualizations with fresh data. Be part of a culture of **data collaboration**, extending the impact of your insights.

[...]

Sharing and collaborating securely

Communicate with data in a whole new way. **Share visualizations and underlying data securely** using Tableau Server or Tableau Online. Create an environment where **everyone in your organization can share and collaborate on trusted data**.

<https://www.tableau.com/products/desktop>

Tableau Online is your analytics platform fully hosted in the cloud.

[...]

Data management

Centralize access to your data in the cloud. **Publish data models** and make it easy for everyone to work from a curated, single source of truth.

[...]

Share in seconds

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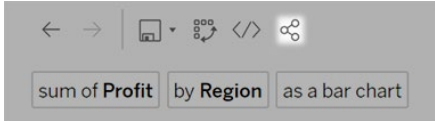
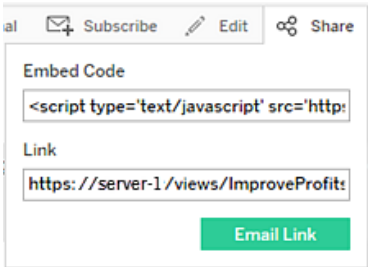
	<p>Share a dashboard with a few clicks to start a conversation around data with your team. Comment and interact live on the web and on mobile devices.</p> <p>https://www.tableau.com/trial/tableau-online</p> <p><u>Share links to Ask Data vizzes</u></p> <p>You can quickly share Ask Data vizzes without even saving a sheet. Simply click the link icon above the query box, and copy a link viewable by anyone with access to the data source.</p>  <p><u>Embed Ask Data in a web page</u></p> <p>After you ask a question with Ask Data, an Embed Code icon appears in the toolbar. Click it to copy code you can incorporate into any web page.</p>  <p>https://help.tableau.com/current/pro/desktop/en-us/ask_data.htm</p> <p>Tableau Help > Tutorial: Get Started with Tableau Desktop > Step 8: Share your findings with others [...]</p> <p>3. From the menu, select Share.</p> 
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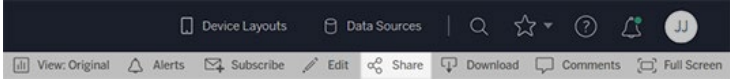
	<p>4. How do you want to share your story?</p> <ol style="list-style-type: none">Embed on your website: Copy the Embed Code and paste it in your web page HTML.Send a link: Copy the Link and send to your colleagues.Send an email using your default email client: Click the email icon. <p>https://help.tableau.com/current/guides/get-started-tutorial/en-us/get-started-tutorial-share.htm</p> <p>Tableau Help > Tableau Desktop and Web Authoring Help > ... > Embed Views and Dashboards > Embed Views into Webpages [...]</p> <p>You can embed interactive Tableau views and dashboards into web pages, blogs, wiki pages, web applications, and intranet portals. Embedded views update as the underlying data changes, or as their workbooks are updated on Tableau Server or Tableau Online. [...]</p> <p>You can do the following to embed views and adjust their default appearance:</p> <ul style="list-style-type: none">Get the embed code provided with a view: The Share button at the top of each view opens a dialog from which you can copy the embed code and paste into your webpage. (The Share button doesn't appear in embedded views if you change the showShareOptions parameter to false in the code.)  <ul style="list-style-type: none">Customize the embed code: You can customize the embed code using parameters that control the toolbar, tabs, and more. For more information, see Parameters for Embed Code.Use the Tableau JavaScript API: Web developers can use Tableau JavaScript objects in web applications. To get access
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	<p>to the API, documentation, code examples, and the Tableau developer community, see the Tableau Developer Portal.</p> <p>https://help.tableau.com/current/pro/desktop/en-us/embed.htm</p> <p>Tableau Help > Tableau Desktop and Web Authoring Help > ... > Build Data Views from Scratch > Add Interactivity using Actions</p> <p>Actions [...]</p> <p>Add context and interactivity to your data using actions. Users interact with your visualizations by selecting marks, or hovering, or clicking a menu, and the actions you set up can respond with navigation and changes in the view.</p> <p>For example, in a dashboard showing home sales by neighborhood, you could use actions to display relevant information for a selected neighborhood. Selecting a neighborhood in one view can trigger an action that highlights the related houses in a map view, filters a list of the houses sold, then opens an external web page showing census data for the neighborhood. [...]</p> <p>Here's how you use the different types of actions:</p> <ul style="list-style-type: none">• Filter. Use the data from one view to filter data in another to help guide analysis.• Highlight. Call attention to marks of interest by coloring specific marks and dimming all others.• Go to URL. Create hyperlinks to external resources, such as a web page, file, or another Tableau worksheet.• Go to Sheet. Simplify navigation to other worksheets, dashboards, or stories.• Change Parameter. Let users change parameter values by directly interacting with marks on a viz.• Change Set Values. Let users change the values in a set by directly interacting with marks on a viz.
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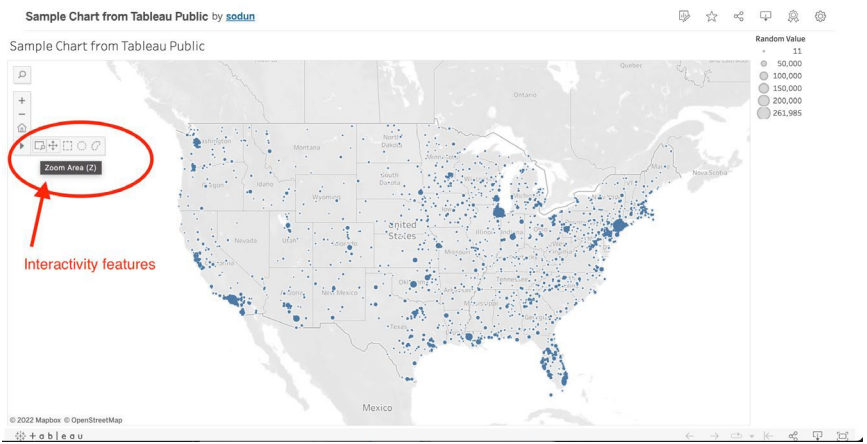
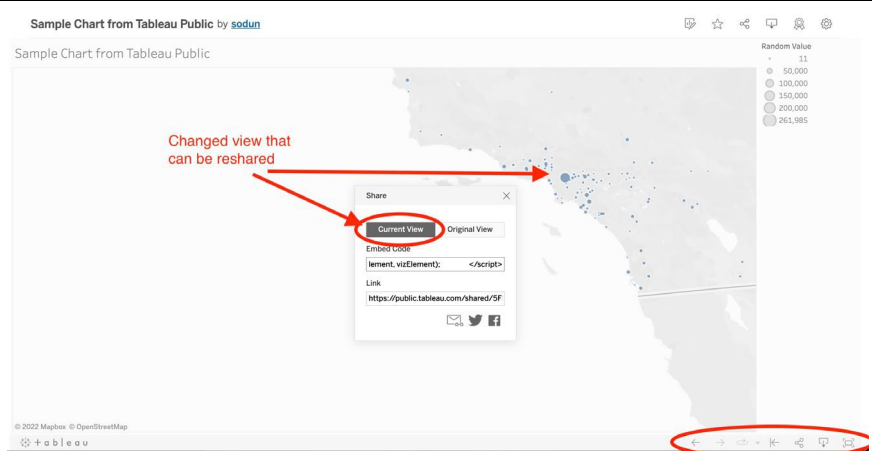
	<p>https://help.tableau.com/current/pro/desktop/en-us/actions.htm</p> <p>Tableau Public: https://public.tableau.com/app/discover Welcome to Tableau Public</p> <p>A free platform to explore, create, and publicly share data visualizations online.</p>
<p>5. The system of claim 4, wherein the one or more interactive features include at least one of a zoom feature, a data mouse-over pop-up window, a data hide feature, a data share feature, an audio feature, a video feature, an animation feature, and a drill-down feature, or a data gliding feature.</p>	<p><i>The one or more interactive features of claim 4 further includes at least one of a zoom feature, a data mouse-over pop-up window, a data hide feature, a data share feature, an audio feature, a video feature, an animation feature, and a drill-down feature, or a data gliding feature.</i></p> <p><i>See claim 4, above.</i></p> <p><i>See also:</i></p> <p>The “published” interactive chart is shown below as seen on a second website.</p>  <p>By selecting a zoom function (as shown above), the published interactive chart can be modified without using the user interface on the first website, as shown below.</p>

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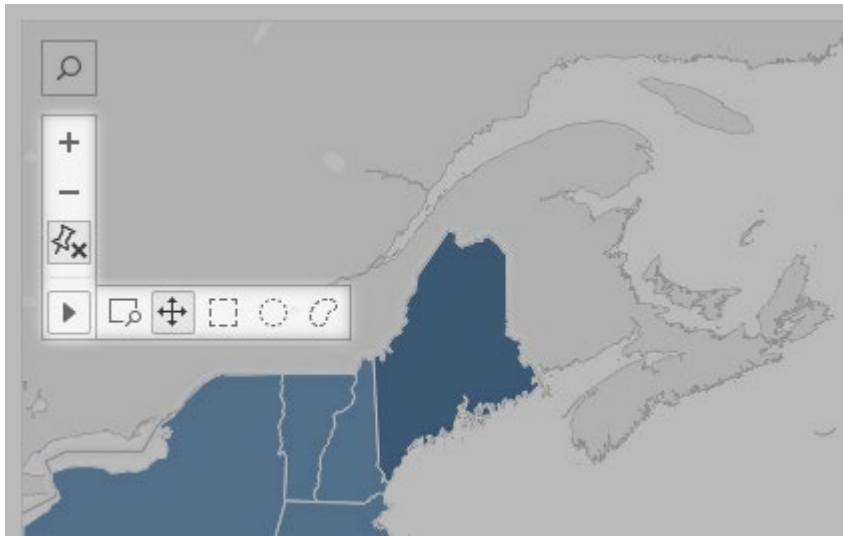


https://help.tableau.com/current/pro/desktop/en-us/inspectdata_pan_zoom.htm

Zoom and Pan Views, and Select Marks

Applies to: Tableau Cloud, Tableau Desktop, Tableau Server

In the upper-left corner of a view, the view toolbar lets you zoom in and out, pan the view, and select data marks.



https://help.tableau.com/current/pro/desktop/en-us/viz_in_toolbar.htm

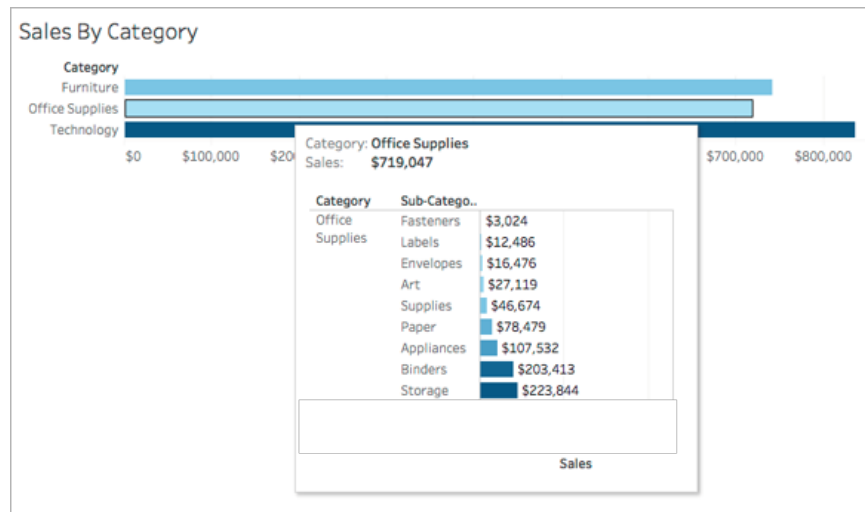
Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

Create Views in Tooltips (Viz in Tooltip)

Applies to: Tableau Cloud, Tableau Desktop

As you craft views and look for ways to reveal more details about data to your audience, you can embed visualizations within tooltips—also known as “Viz in Tooltip.”



<https://www.tableau.com/drive/hiding-aspects-of-views#:~:text=Hiding%20Marks%20is%20done%20with,want%20to%20show%20one%20measure!>

Tableau offers the ability for a user to ‘hide’ fields, headers, and other aspects of analysis in order to appropriately display the visual, but preserve the structure of the query by circumventing the use of filters.

https://help.tableau.com/current/pro/desktop/en-us/actions_url.htm

URL Actions

Applies to: Tableau Cloud, Tableau Desktop, Tableau Server

A URL action is a hyperlink that points to a web page, file, or other web-based resource outside of Tableau. You can use URL actions to create an email or link to additional information about your data. To customize links based on your data, you can automatically enter field values as parameters in URLs.

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	<p>https://help.tableau.com/current/guides/get-started-tutorial/en-us/get-started-tutorial-drilldown.htm</p> <p>CONTENTS</p> <p>Overview</p> <p>Step 1: Connect to your data</p> <p>Step 2: Drag and drop to take a first look</p> <p>Step 3: Focus your results</p> <p>Step 4: Explore your data geographically</p> <p>Step 5: Drill down into the details</p> <p>Step 6: Build a dashboard to show your insights</p> <p>Step 7: Build a story to present</p> <p>Step 8: Share your findings with others</p> <p>Learning Library</p>
<p>6. The system of claim 1, wherein the interactive chart is stored in the memory and is selectable by a subsequent user.</p>	<p><i>The interactive chart of system in claim 1 is stored in the memory and is selectable by a subsequent user.</i></p> <p><i>The interactive chart generated by a first user is then stored in the memory of the server (i.e. the Tableau server's memory or Tableau's customers' servers memory), which then can be accessed by a subsequent user because the interactive chart has been shared with the subsequent user.</i></p> <p><i>See claim 1(pre)-1(d), for elements of claim 1; see particularly 1(c) and 1(d) for the interactive chart being stored in the memory and is selectable by a subsequent user.</i></p>

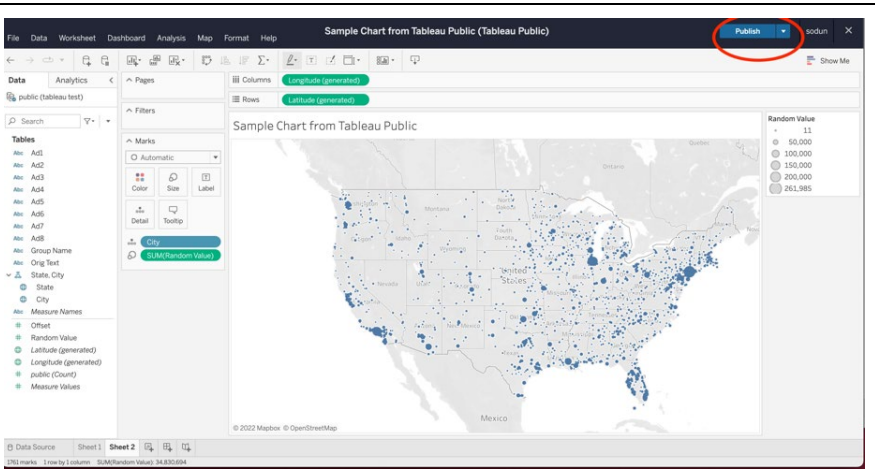
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“Creation, sharing and embedding of interactive charts”

<p>7 [pre]. A method for creating interactive charts, the method comprising:</p>	<p><i>Tableau directly infringes the claimed method for creating interactive charts, as set forth below when Tableau is operating and controlling the server that performs the steps (e.g., Tableau Public, Tableau Cloud).</i></p> <p><i>Tableau’s customers directly infringe the claimed method for creating interactive charts, as set forth below when Tableau’s customers are operating and controlling the server that performs the steps (e.g., Tableau Server).</i></p> <p><i>Tableau has induced and is inducing its customers direct infringement of this claim by encouraging its customers to perform each of the steps of the claimed method for creating interactive charts by deploying Tableau Server.</i></p> <p><i>See claim 1[pre], above.</i></p>
<p>[7(a)] generating a user interface on a first website;</p>	<p><i>Tableau and its customers perform the step of generating a user interface on a first website.</i></p> <p><i>See claim 1(c) and claim 3, above.</i></p> <p><i>The software executed on Tableau’s servers generate a user interface through Tableau Cloud and Tableau Public. Tableau Cloud and Tableau Public provide a user interface that is displayed on a user’s computer in a web browser that comprises of a chart pane and a data pane.</i></p> <p><i>The software executed on Tableau’s customers’ servers generate a user interface through Tableau Server. Tableau Server provides a user interface that is displayed on a user’s computer in a web browser that comprises of a chart pane and a data pane.</i></p> <p><i>As shown below, the user interface displayed by Tableau Public includes a chart pane (e.g. the map of the US) as shown below.</i></p>

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Additionally, the **user interface** displayed by Tableau Public includes a **data pane** (e.g. the Data tab on the left of the image). When **chart data has been dragged from the data pane and dropped into the chart pane**, the chart is updated to include the data, as shown above.

Tableau Help > Tableau Desktop and Web Authoring Help > Build Charts and Analyze Data > Build Data Views From Scratch > Start Building a Visualization by Dragging Fields to the View:
https://help.tableau.com/current/pro/desktop/en-us/buildmanual_dragging.htm

Start Building a Visualization by Dragging Fields to the View

Applies to: Tableau Cloud, Tableau Desktop, Tableau Server

The basic structure for every view is made of dimension and measure fields placed on the Rows and Columns shelves, and on different properties in the Marks card.

You build visualizations by adding fields from the Data pane to the view. As you build a visualization, you can add as many fields as necessary to different areas of the view, and then move those fields around as your explore your data.

Different ways to start building a view

When you build a view, you add fields from the **Data** pane. You can do this in different ways. For example:

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U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

- Drag fields from the **Data** pane and drop them onto the cards and shelves that are part of every Tableau worksheet.
- Double-click one or more fields in the **Data** pane.
- Select one or more fields in the **Data** pane and then choose a chart type from **Show Me**, which identifies the chart types that are appropriate for the fields you selected. For details, see [Use Show Me to Start a View](#).
- Drop a field on the **Drop field here** grid, to start creating a view from a tabular perspective.



As you start exploring data in Tableau, you will find there are many ways to build a view. Tableau is extremely flexible, and also very forgiving. As you build a view, if you ever take a path that isn't answering your question, you can always undo to a previous point in your exploration.

- To undo or redo, click undo  or redo  on the toolbar.
- You can undo all the way back to the last time you opened the workbook. You can undo or redo an unlimited number of times.

Dragging basics

When you begin creating a new data view on a blank worksheet, you can drag a field from the **Data** pane and drop it directly into the view, rather than to a shelf.

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The screenshot shows the Tableau Desktop interface. On the left is the 'Data' pane with a search bar and a list of folders: 'Customer' (containing 'Customer Name' and 'Segment'), 'Order' (containing 'Location', 'Order Profitable?', 'Person', 'Product', 'Returned', and 'Ship Status'), and 'Parameters' (containing 'Base Salary'). The 'Marks' card is visible with options for 'Automatic', 'Color', 'Size', 'Text', 'Detail', and 'Tooltip'. The main view area is labeled 'Sheet 1' and contains three 'Drop field here' prompts.

In Tableau Desktop, while dragging fields, you can hover over the different areas in the view to see how the field will be incorporated into the structure of the view. For example, dimensions typically add a row and column headers to the view, while measures add continuous axes. Below are some examples of how fields can be added to the view.

Dimensions add headers	Measures add axes	Show Me automatically adds the field according to best practices
<p>The screenshot shows a Tableau view with a dimension field added to the view, creating a header. The view area contains three 'Drop field here' prompts.</p>		

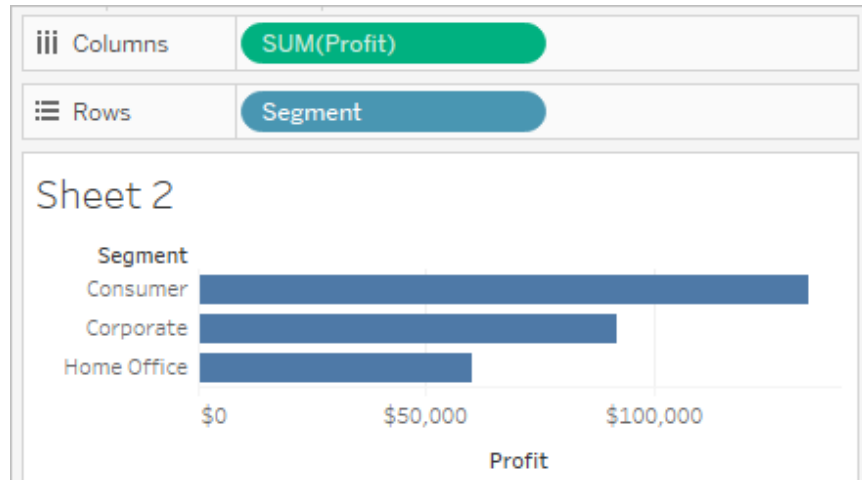
For a more advanced discussion of dimensions and measures, see [Dimensions and Measures, Blue and Green](#).

When you drop a field on one of the active areas in the view, the field is added to the view and also to one of the shelves or cards. For example, in the view below the **Segment** dimension was added to the

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Rows shelf and the **Profit** measure was added to the **Columns** shelf—and automatically aggregated so that the values in the data are summed.



You can, of course, also drag fields directly to the shelves instead of to the active areas in the view. You can also drag fields from one shelf to another shelf. To remove a field from a shelf, drag it off the worksheet or select **Remove** from the field's menu (available when you right-click (control-click on Mac) a field in the view. In Tableau Desktop, you can also quickly remove multiple fields from a shelf by right-clicking (control-click on Mac) the shelf and selecting **Clear Shelf**.

Tableau Cloud, Server, Or Desktop Example:

https://help.tableau.com/current/pro/desktop/en-us/buildmanual_dragging.htm

Start Building a Visualization by Dragging Fields to the View

Applies to: Tableau Cloud, Tableau Desktop, Tableau Server

Then click on “Use Show Me to Start a View”:

https://help.tableau.com/current/pro/desktop/en-us/buildauto_showme.htm

Step 1: Start Building a Visualization by Dragging Fields to the View

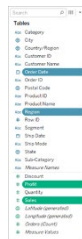
Applies to: Tableau Cloud, Tableau Desktop, Tableau Server

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To use Show Me, select the fields you want to analyze in the Data pane, and then select the type of view you want to create in the Show Me pane. Tableau automatically evaluates the selected fields and gives you the option of several types of views that would be appropriate for those fields. Show Me also highlights the visualization type that best matches the data.

1. In the **Data pane**, select the **fields** that you want to **analyze**. Hold the Ctrl key (Command key on a Mac) to make multiple selections.



2. Click Show Me on the toolbar and then select the type of view you want to create

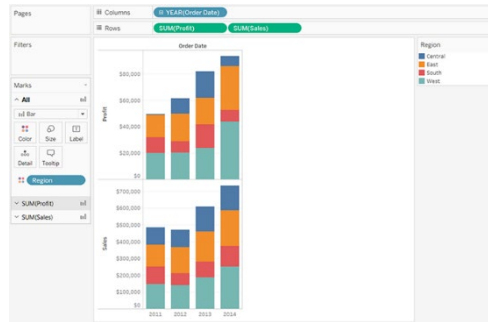


Any view type that is not gray will **generate a view of your data**. As you hover over each view type, the description at the bottom shows the minimum requirements. In this example, Stacked Bars is selected.

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3. View the Result. Tableau automatically creates a view of the data.



<https://help.tableau.com/current/guides/get-started-tutorial/en-us/get-started-tutorial-drag.htm>

Step 2: **Drag and drop** to take a first look [...]

Create a view

You set out to identify key areas for improvement, but where to start? With four years' worth of data, you decide to drill into the overall sales data to see what you find. Start by creating a simple chart. [...]

1. From the Data pane, drag Order Date to the Columns shelf.

Note: When you drag Order Date to the columns shelf, Tableau creates a column for each year in your data set. Under each column is an Abc indicator. This indicates that you can drag text or numerical data here, like what you might see in an Excel spreadsheet. If you were to drag Sales to this area, Tableau creates a crosstab (like a spreadsheet) and displays the sales totals for each year.

2. From the Data pane, drag Sales to the Rows shelf.

Tableau generates the following chart with sales rolled up as a sum (aggregated). You can see total **aggregated sales for each year by order date**.

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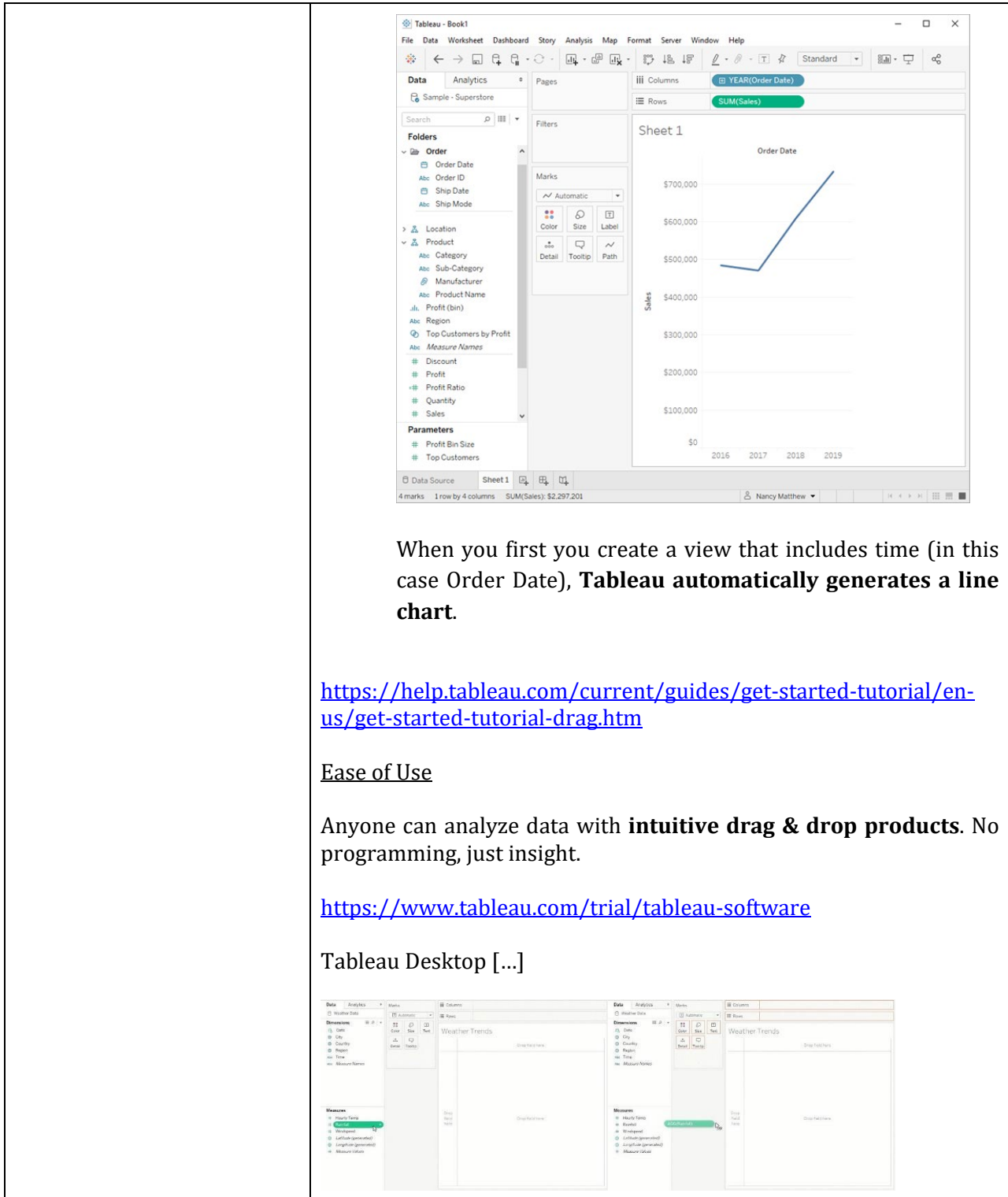


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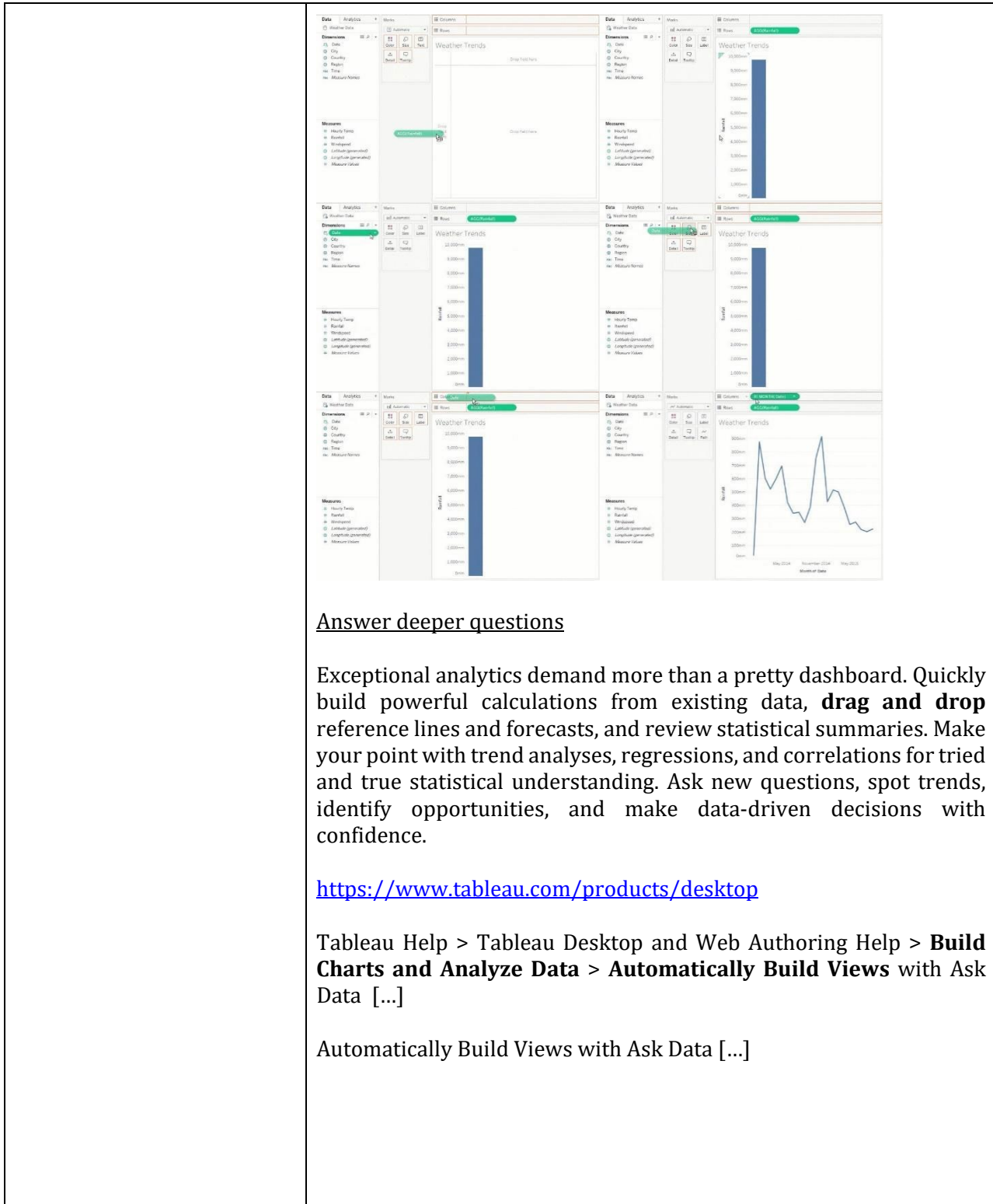


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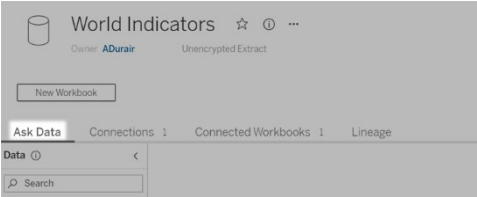
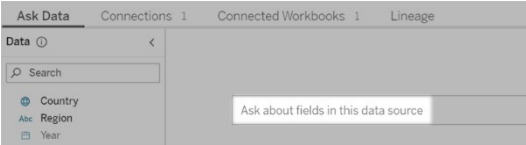
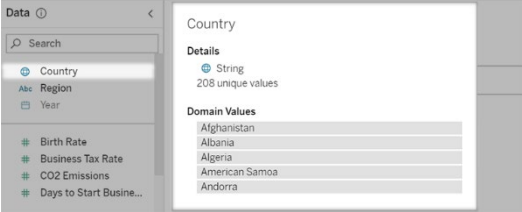
	<p><u>Ask Data to quickly build a viz</u></p> <ol style="list-style-type: none"> 1. In Tableau Server or Tableau Online, navigate to a data source, and then click Ask Data at left.  <ol style="list-style-type: none"> 2. In the text box reading “Ask about fields in this data source”, enter terms from the data source fields at left.  <p>Hover over each field to learn more about the data it contains. Unlike the data fields seen in standard Tableau views, these fields can't be dragged to the canvas.</p>  <ol style="list-style-type: none"> 3. As you type, Ask Data automatically completes your entry using likely combinations of data fields and analytical functions. To automatically create a viz, either press Enter, or choose from suggested entries below the text box. Just like that, you've created a compelling visualization of your data!
<p>[7(b)] receiving a selection of a chart template via the user interface;</p>	<p><i>Tableau and its customers perform the step of receiving a user selection of a chart template via the user interface.</i></p>

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The software executed on Tableau’s servers receive a user selection via the user interface, e.g., because the user selects a chart template because the user’s browser sends the user’s chart template selection to Tableau Cloud or Tableau Public that resides on a Tableau server.

The software executed on Tableau’s customers’ servers receive a user selection of a chart template because the user’s browser sends the user’s chart template selection to Tableau Server that resides on the customers’ servers.

For example, the user may choose a chart template by clicking on a particular chart that is being presented (e.g., workbook templates, Show Me tool bar, Dashboard or Accelerators, or marks (mark types, mark cards)). Tableau Accused Products then present data to the user in the style of chart selected by the user.

Workbooks templates: <https://www.tableau.com/trial/tableau-templates>

Use the following workbooks as templates to get a jump-start on your analysis.

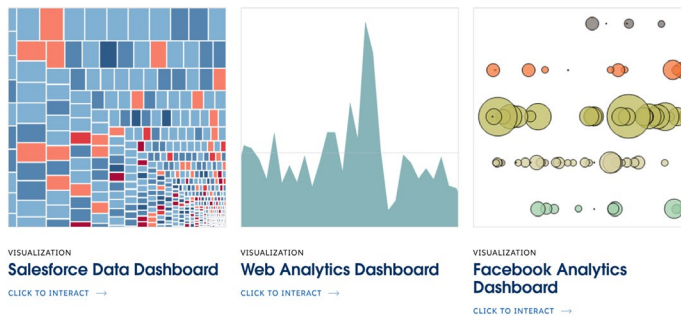


Chart Types templates:
https://help.tableau.com/current/pro/desktop/en-us/dataview_examples.htm

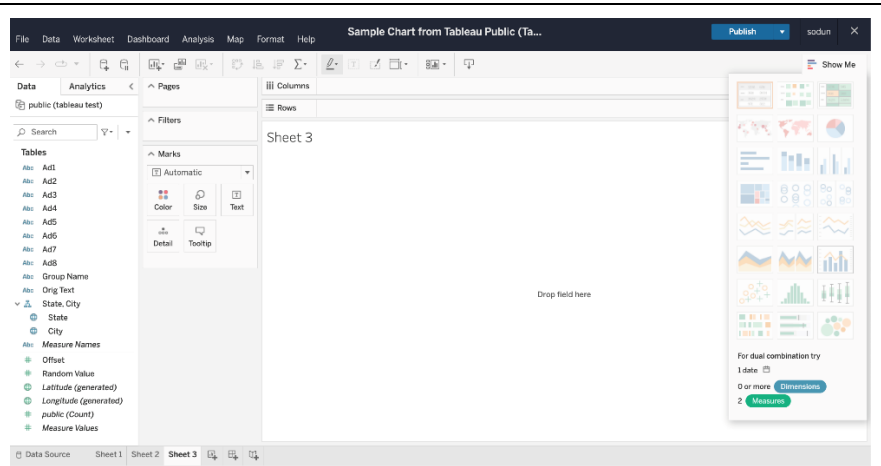
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	<h4>Build Common Chart Types in Data Views</h4> <p><i>Applies to: Tableau Desktop</i></p> <p>This section includes detailed exercises that guide you through the steps involved in building some common chart types in data views. All exercises use the Sample - Superstore data source, which is included with Tableau Desktop. This collection of topics is just a sample of the many types of data views that you can create in Tableau. For details on options for building views from scratch, see Build Data Views from Scratch and Build a Basic View to Explore Your Data.</p> <p>Other articles in this section</p> <ul style="list-style-type: none">• Build an Area Chart• Build a Bar Chart• Build a Box Plot• Build a Bullet Graph• Build with Density Marks (Heatmap)• Build a Gantt Chart• Build a Highlight Table• Build a Histogram• Build a Line Chart• Build a Packed Bubble Chart• Build a Pie Chart• Build a Scatter Plot• Build a Text Table• Build a Treemap• Build Combination Charts <p><i>Tableau Cloud, Server, Or Desktop Example:</i> https://help.tableau.com/current/pro/desktop/en-us/buildmanual_dragging.htm</p> <p><u>Start Building a Visualization by Dragging Fields to the View</u> <i>Applies to: Tableau Cloud, Tableau Desktop, Tableau Server</i></p> <p><i>Then click on “Use Show Me to Start a View”:</i>https://help.tableau.com/current/pro/desktop/en-us/buildauto_showme.htm</p> <p>The Show Me tab on the top right shows multiple chart templates available for selection by the user.</p>
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2. Click Show Me on the toolbar and then select **the type of view you want to create.**



Any view type that is not gray will **generate a view of your data**. As you hover over each view type, the description at the bottom shows the minimum requirements. In this example, Stacked Bars is selected.

Tableau Dashboard or Accelerators:

<https://www.tableau.com/solutions/exchange/accelerators>

Jumpstart analytics with expert-built dashboards for a variety of use cases across departments, industries, and enterprise applications.

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Tableau Accelerators are ready-to-use dashboards that you can combine with your data and customize to fit your needs to help you get to data-driven insights faster.

Webpage title: Tableau Dashboard **Starters** and **templates**

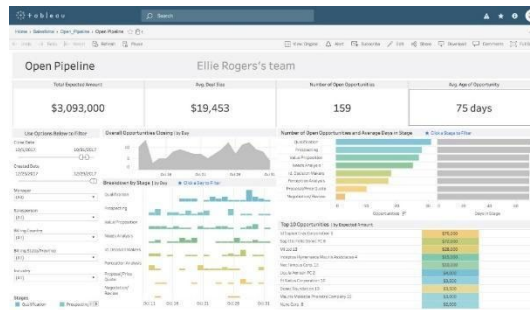
Dashboard **Starters** for Tableau Online

Go from data to insights to action faster than ever before

Beauty and Brains

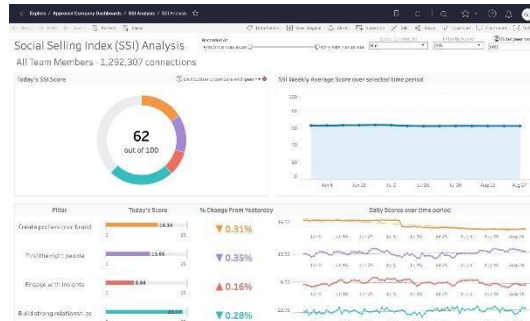
Dashboard Starters for Tableau Online are designed to help you hit the ground running with actionable data in minutes. In just a few clicks, you'll be able to connect to common enterprise applications and create beautiful, data-rich dashboards seamlessly.

Salesforce **Starters**



Have a **sales team** your whole industry chases [...]

LinkedIn Sales Navigator **Starter**



Make your **sales strategy** data-driven [...]

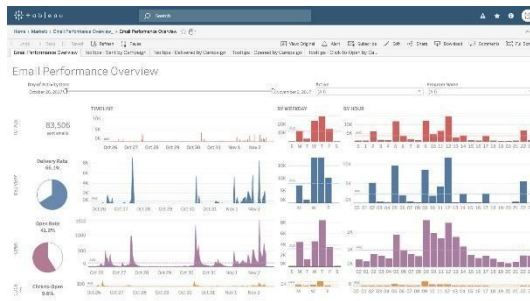
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Oracle Eloqua Starters

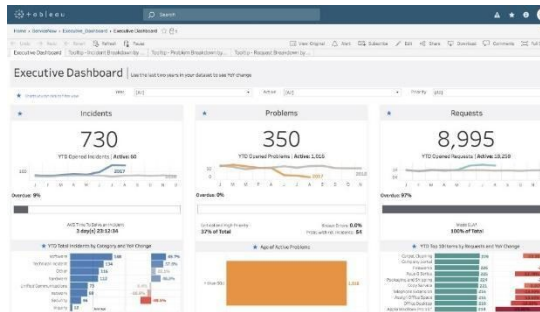
Your **email marketing** data just evolved [...]

Marketo Starters



Your **Marketo** data never looked so good [...]

ServiceNow Starters



See all facets of your **IT org** [...]

Dashboard Starters

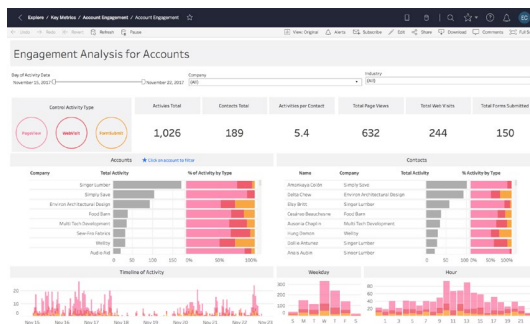


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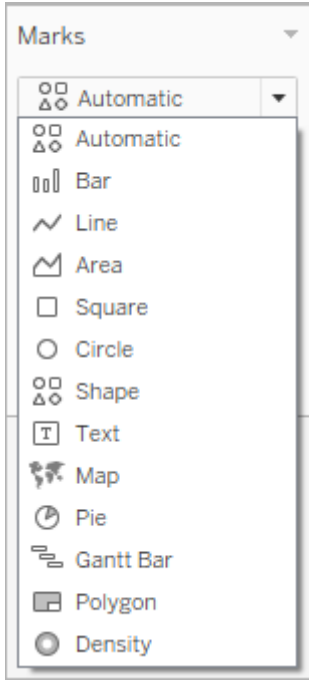
	<p>Dashboard Starters are designed to help you hit the ground running with actionable data in minutes. In just a few clicks, you’ll be able to connect to popular web applications and create pre-built dashboards seamlessly.</p> <p>https://help.tableau.com/current/pro/desktop/en-us/viewparts_marks_marktypes.htm</p> <p><u>Change the mark type</u></p> <p>To change the mark type:</p> <ul style="list-style-type: none">On the Marks card, click the Mark Type drop-down and select an option from the list. 
[7(c)] receiving entry of chart data via the user interface;	<p><i>Tableau and its customers perform the step of receiving entry of chart data via the user interface.</i></p> <p><i>See claim 1(c) and claim 3, above.</i></p> <p><i>The software executed on Tableau’s servers receive a user selection of data via the user interface. Because Tableau Cloud causes the user</i></p>

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	<p><i>interface to update based on the user's selection of data, Tableau Cloud receives the user selection.</i></p> <p><i>The software executed on Tableau's customers' servers receive user selection of data through Tableau Server located on their servers.</i></p> <p>Tableau Help > Tableau Desktop and Web Authoring Help > Build Charts and Analyze Data > Build Data Views From Scratch > Start Building a Visualization by Dragging Fields to the View: https://help.tableau.com/current/pro/desktop/en-us/buildmanual_dragging.htm</p> <p><u>Start Building a Visualization by Dragging Fields to the View</u></p> <p><i>Applies to: Tableau Cloud, Tableau Desktop, Tableau Server</i></p> <p>The basic structure for every view is made of dimension and measure fields placed on the Rows and Columns shelves, and on different properties in the Marks card.</p> <p>You build visualizations by adding fields from the Data pane to the view. As you build a visualization, you can add as many fields as necessary to different areas of the view, and then move those fields around as your explore your data.</p> <p><u>Different ways to start building a view</u></p> <p>When you build a view, you add fields from the Data pane. You can do this in different ways. For example:</p> <ul style="list-style-type: none">• Drag fields from the Data pane and drop them onto the cards and shelves that are part of every Tableau worksheet.• Double-click one or more fields in the Data pane.• Select one or more fields in the Data pane and then choose a chart type from Show Me, which identifies the chart types that are appropriate for the fields you selected. For details, see Use Show Me to Start a View.• Drop a field on the Drop field here grid, to start creating a view from a tabular perspective.
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As you start exploring data in Tableau, you will find there are many ways to build a view. Tableau is extremely flexible, and also very forgiving. As you build a view, if you ever take a path that isn't answering your question, you can always undo to a previous point in your exploration.

- To undo or redo, click undo  or redo  on the toolbar.
- You can undo all the way back to the last time you opened the workbook. You can undo or redo an unlimited number of times.

Dragging basics

When you begin creating a new data view on a blank worksheet, you can drag a field from the **Data** pane and drop it directly into the view, rather than to a shelf.

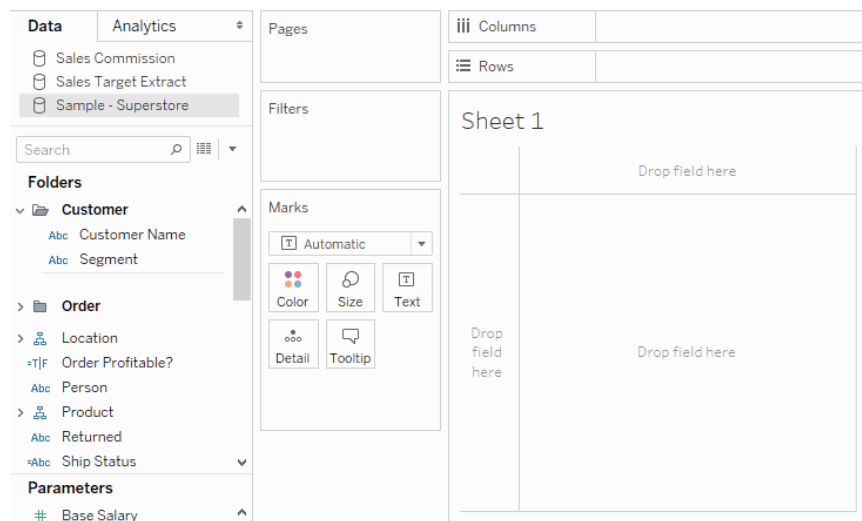


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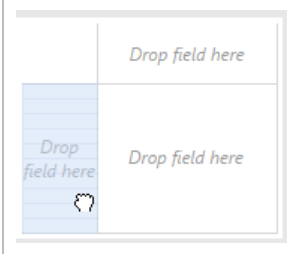
	<p>In Tableau Desktop, while dragging fields, you can hover over the different areas in the view to see how the field will be incorporated into the structure of the view. For example, dimensions typically add a row and column headers to the view, while measures add continuous axes. Below are some examples of how fields can be added to the view.</p>		
	Dimensions add headers	Measures add axes	Show Me automatically adds the field according to best practices
			
	<p>For a more advanced discussion of dimensions and measures, see Dimensions and Measures, Blue and Green.</p> <p>When you drop a field on one of the active areas in the view, the field is added to the view and also to one of the shelves or cards. For example, in the view below the Segment dimension was added to the Rows shelf and the Profit measure was added to the Columns shelf—and automatically aggregated so that the values in the data are summed.</p>		

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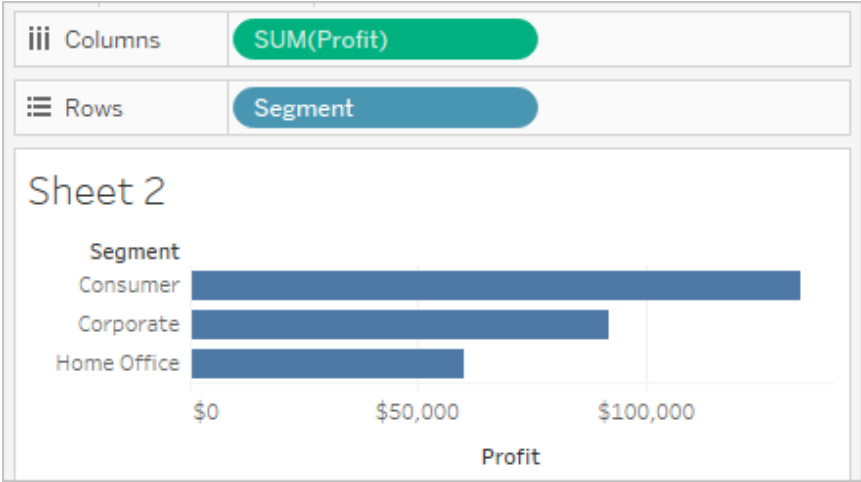
	<div data-bbox="560 315 1416 793"><table border="1"><thead><tr><th>Segment</th><th>Profit (Approximate)</th></tr></thead><tbody><tr><td>Consumer</td><td>\$120,000</td></tr><tr><td>Corporate</td><td>\$90,000</td></tr><tr><td>Home Office</td><td>\$60,000</td></tr></tbody></table></div> <p>You can, of course, also drag fields directly to the shelves instead of to the active areas in the view. You can also drag fields from one shelf to another shelf. To remove a field from a shelf, drag it off the worksheet or select Remove from the field's menu (available when you right-click (control-click on Mac) a field in the view. In Tableau Desktop, you can also quickly remove multiple fields from a shelf by right-clicking (control-click on Mac) the shelf and selecting Clear Shelf.</p> <p><i>Tableau Cloud, Server, Or Desktop Example:</i> https://help.tableau.com/current/pro/desktop/en-us/buildmanual_dragging.htm</p> <p><u>Start Building a Visualization by Dragging Fields to the View</u></p> <p><i>Applies to: Tableau Cloud, Tableau Desktop, Tableau Server</i></p> <p><i>Then click on “Use Show Me to Start a View”:</i> https://help.tableau.com/current/pro/desktop/en-us/buildauto_showme.htm</p> <p>Step 1: Start Building a Visualization by Dragging Fields to the View</p> <p><i>Applies to: Tableau Cloud, Tableau Desktop, Tableau Server</i></p> <p>Step 2: Drag and drop to take a first look [...]</p>	Segment	Profit (Approximate)	Consumer	\$120,000	Corporate	\$90,000	Home Office	\$60,000
Segment	Profit (Approximate)								
Consumer	\$120,000								
Corporate	\$90,000								
Home Office	\$60,000								

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Create a view

You set out to identify key areas for improvement, but where to start? With four years' worth of data, you decide to drill into the overall sales data to see what you find. Start by creating a simple chart. [...]

1. **From the Data pane, drag Order Date to the Columns shelf.**

Note: When you drag Order Date to the columns shelf, Tableau creates a column for each year in your data set. Under each column is an Abc indicator. This indicates that you can drag text or numerical data here, like what you might see in an Excel spreadsheet. If you were to drag Sales to this area, Tableau creates a crosstab (like a spreadsheet) and displays the sales totals for each year.

2. **From the Data pane, drag Sales to the Rows shelf.**

Tableau generates the following chart with sales rolled up as a sum (aggregated). You can see total **aggregated sales for each year by order date**.

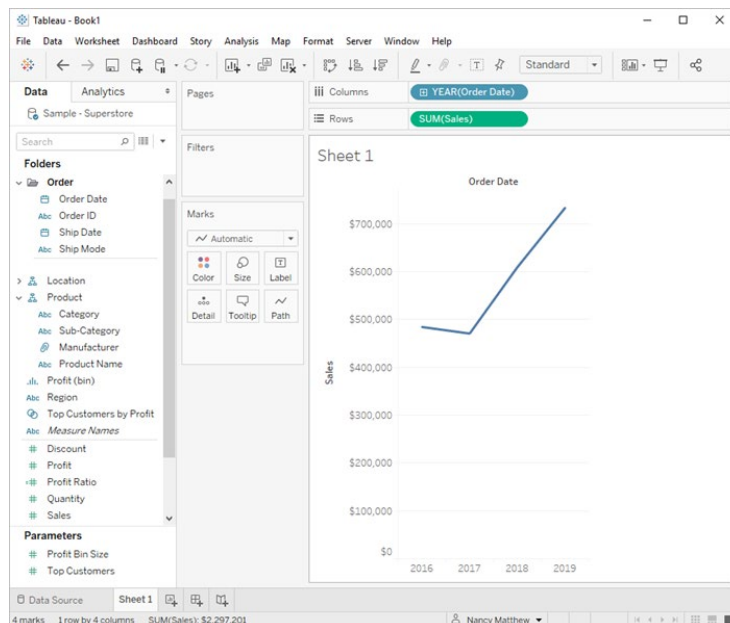


Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

When you first you create a view that includes time (in this case Order Date), **Tableau** automatically generates a line chart.

<https://help.tableau.com/current/guides/get-started-tutorial/en-us/get-started-tutorial-drag.htm>

Ease of Use

Anyone can analyze data with **intuitive drag & drop products**. No programming, just insight.

<https://www.tableau.com/trial/tableau-software>

Tableau Desktop [...]

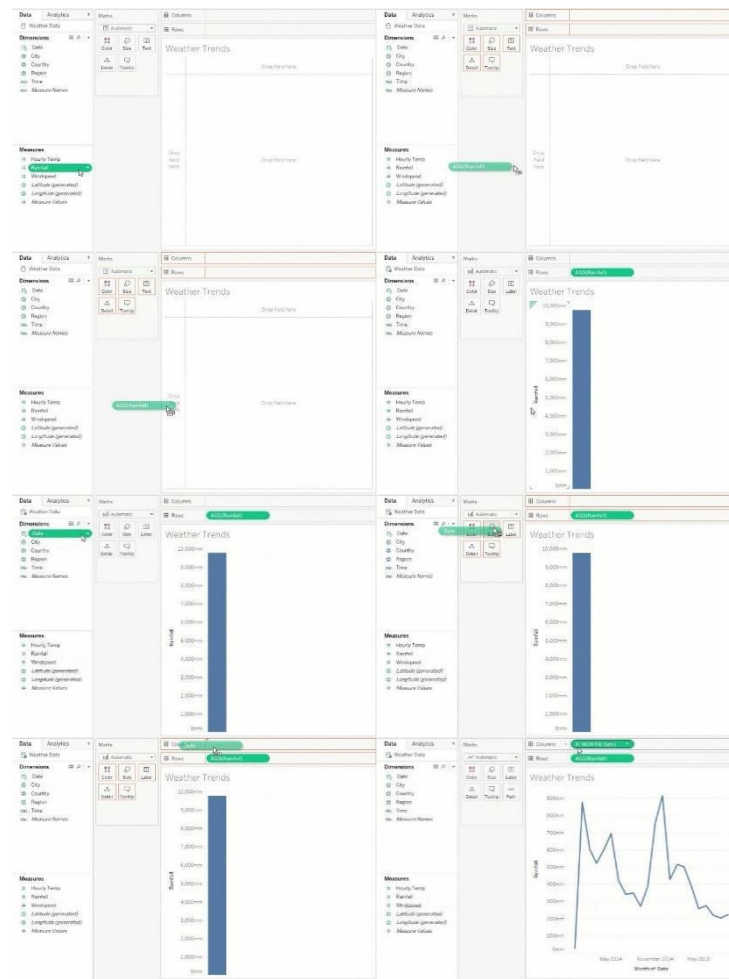


Exhibit B

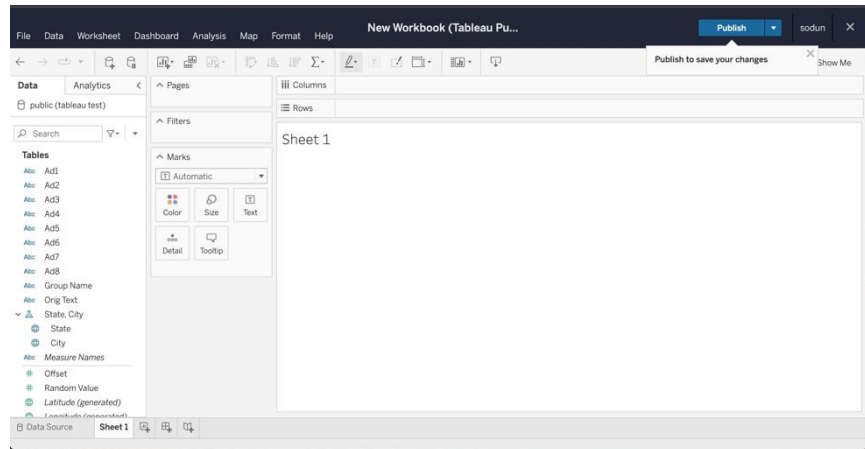
U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

Answer deeper questions

Exceptional analytics demand more than a pretty dashboard. Quickly build powerful calculations from existing data, **drag and drop** reference lines and forecasts, and review statistical summaries. Make your point with trend analyses, regressions, and correlations for tried and true statistical understanding. Ask new questions, spot trends, identify opportunities, and make data-driven decisions with confidence.

<https://www.tableau.com/products/desktop>

The **Data** tab on the top left shows multiple sources of **chart data**



[7(d)] generating an interactive chart including the chart data and the chart template;

Tableau and its customers perform the step of generating an interactive chart including the chart data and the chart template.

The software executed on Tableau’s servers (Tableau Cloud, Tableau Public) generate an interactive chart including the chart data and chart template, e.g., using data dropped into the chart pane and the chart template from the chart template module selected by the user.

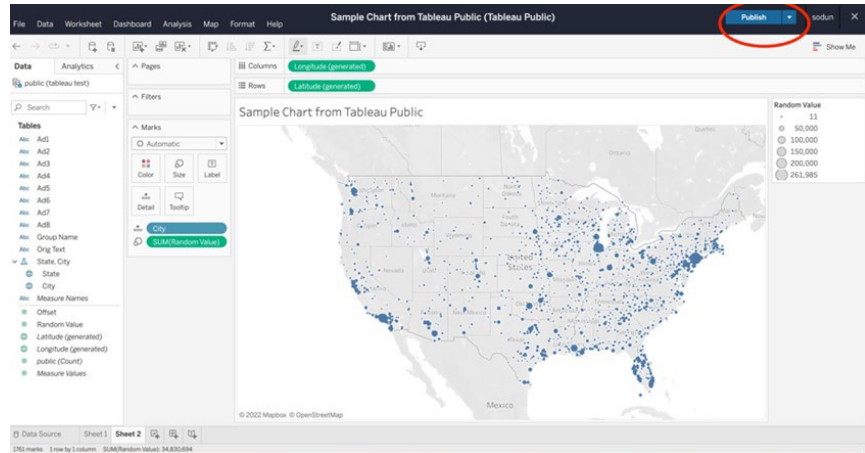
The software executed on Tableau’s customers’ servers (Tableau Server) generate an interactive chart including the chart data and chart template, e.g., using data dropped into the chart pane and the chart template from the chart template module selected by the user.

See claim 1(a) for chart template examples.

Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

By selecting **chart data** and a **chart template**, the **user interface** allows the user to create an **interactive chart**, as shown below.



Start Building a Visualization by Dragging Fields to the View

Applies to: Tableau Cloud, Tableau Desktop, Tableau Server

The basic structure for every view is made of dimension and measure fields placed on the Rows and Columns shelves, and on different properties in the Marks card.

You build visualizations by adding fields from the Data pane to the view. As you build a visualization, you can add as many fields as necessary to different areas of the view, and then move those fields around as you explore your data.

Different ways to start building a view

When you build a view, you add fields from the **Data** pane. You can do this in different ways. For example:

- Drag fields from the **Data** pane and drop them onto the cards and shelves that are part of every Tableau worksheet.
- Double-click one or more fields in the **Data** pane.
- Select one or more fields in the **Data** pane and then choose a chart type from **Show Me**, which identifies the chart types that are appropriate for the fields you selected. For details, see [Use Show Me to Start a View](#).

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U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

- Drop a field on the **Drop field here** grid, to start creating a view from a tabular perspective.



As you start exploring data in Tableau, you will find there are many ways to build a view. Tableau is extremely flexible, and also very forgiving. As you build a view, if you ever take a path that isn't answering your question, you can always undo to a previous point in your exploration.

- To undo or redo, click undo  or redo  on the toolbar.
- You can undo all the way back to the last time you opened the workbook. You can undo or redo an unlimited number of times.

Dragging basics

When you begin creating a new data view on a blank worksheet, you can drag a field from the **Data** pane and drop it directly into the view, rather than to a shelf.

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The screenshot shows the Tableau Desktop interface. On the left is the 'Data' pane with a search bar and a list of folders: 'Customer' (containing 'Customer Name' and 'Segment'), 'Order' (containing 'Location', 'Order Profitable?', 'Person', 'Product', 'Returned', and 'Ship Status'), and 'Parameters' (containing 'Base Salary'). The 'Marks' card is visible with options for 'Automatic', 'Color', 'Size', 'Text', 'Detail', and 'Tooltip'. The main view area is labeled 'Sheet 1' and contains four 'Drop field here' prompts arranged in a 2x2 grid.

In Tableau Desktop, while dragging fields, you can hover over the different areas in the view to see how the field will be incorporated into the structure of the view. For example, dimensions typically add a row and column headers to the view, while measures add continuous axes. Below are some examples of how fields can be added to the view.

Dimensions add headers	Measures add axes	Show Me automatically adds the field according to best practices

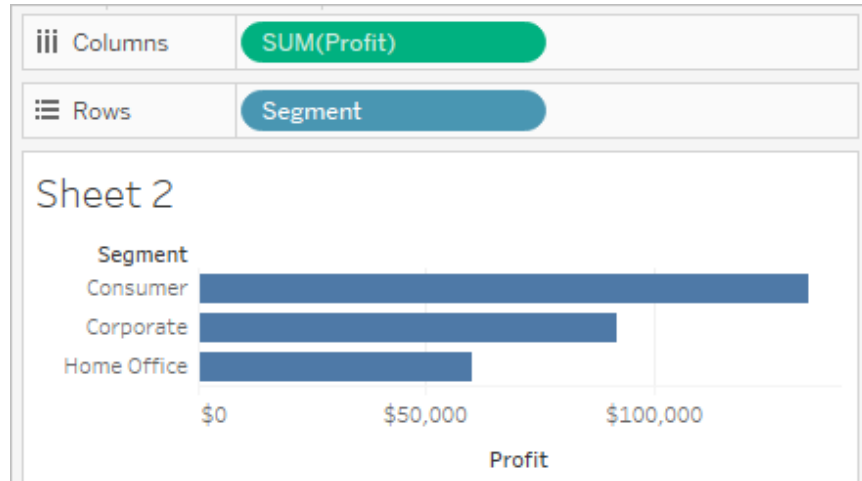
For a more advanced discussion of dimensions and measures, see [Dimensions and Measures, Blue and Green](#).

When you drop a field on one of the active areas in the view, the field is added to the view and also to one of the shelves or cards. For example, in the view below the **Segment** dimension was added to the **Rows** shelf and the **Profit** measure was added to the **Columns** shelf—

Exhibit B

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and automatically aggregated so that the values in the data are summed.



You can, of course, also drag fields directly to the shelves instead of to the active areas in the view. You can also drag fields from one shelf to another shelf. To remove a field from a shelf, drag it off the worksheet or select **Remove** from the field's menu (available when you right-click (control-click on Mac) a field in the view). In Tableau Desktop, you can also quickly remove multiple fields from a shelf by right-clicking (control-click on Mac) the shelf and selecting **Clear Shelf**.

Tableau Cloud, Server, Or Desktop Example:

https://help.tableau.com/current/pro/desktop/en-us/buildmanual_dragging.htm

Start Building a Visualization by Dragging Fields to the View

Applies to: Tableau Cloud, Tableau Desktop, Tableau Server

Then click on “Use Show Me to Start a View”:

https://help.tableau.com/current/pro/desktop/en-us/buildauto_showme.htm

Step 1: Start Building a Visualization by Dragging Fields to the View

Applies to: Tableau Cloud, Tableau Desktop, Tableau Server

Step 2: **Drag and drop** to take a first look [...]

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Create a view

You set out to identify key areas for improvement, but where to start? With four years' worth of data, you decide to drill into the overall sales data to see what you find. Start by creating a simple chart. [...]

1. **From the Data pane, drag Order Date to the Columns shelf.**

Note: When you drag Order Date to the columns shelf, Tableau creates a column for each year in your data set. Under each column is an Abc indicator. This indicates that you can drag text or numerical data here, like what you might see in an Excel spreadsheet. If you were to drag Sales to this area, Tableau creates a crosstab (like a spreadsheet) and displays the sales totals for each year.

2. **From the Data pane, drag Sales to the Rows shelf.**

Tableau generates the following chart with sales rolled up as a sum (aggregated). You can see total **aggregated sales for each year by order date**.

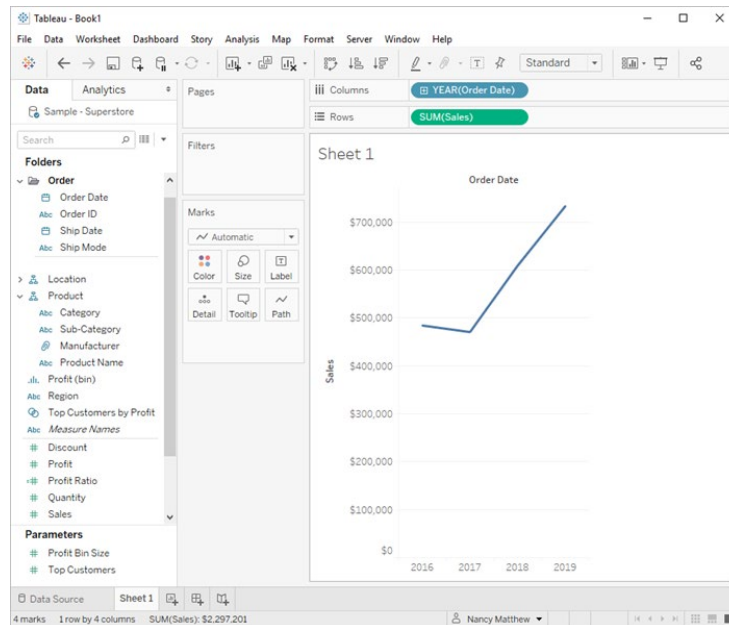


Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

When you first you create a view that includes time (in this case Order Date), **Tableau** automatically generates a line chart.

<https://help.tableau.com/current/guides/get-started-tutorial/en-us/get-started-tutorial-drag.htm>

Ease of Use

Anyone can analyze data with **intuitive drag & drop products**. No programming, just insight.

<https://www.tableau.com/trial/tableau-software>

Tableau Desktop [...]

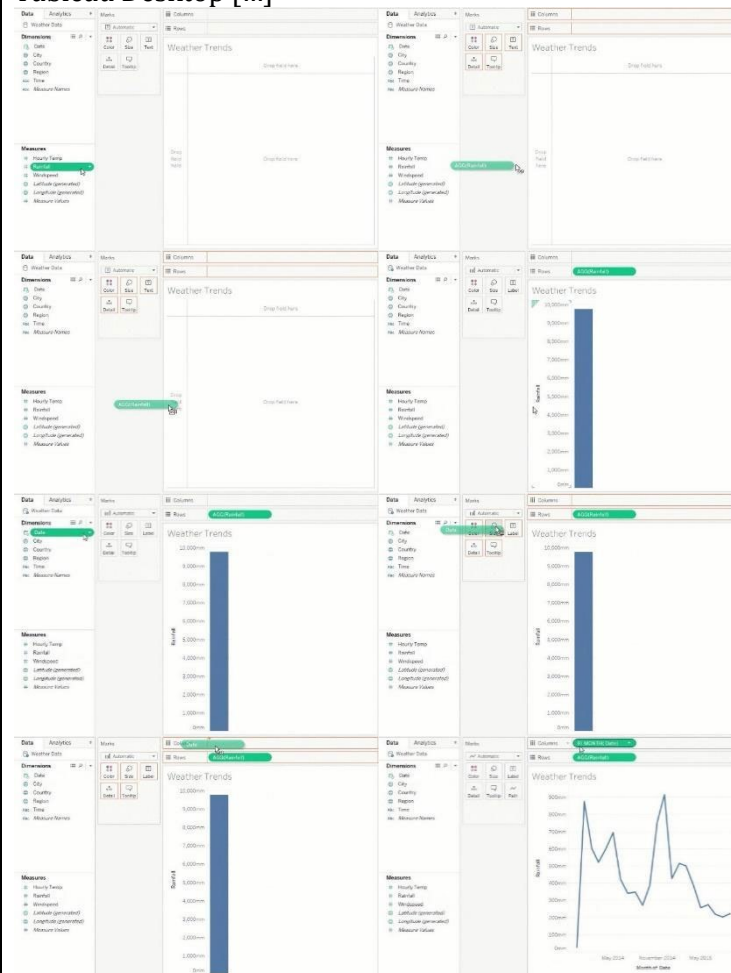


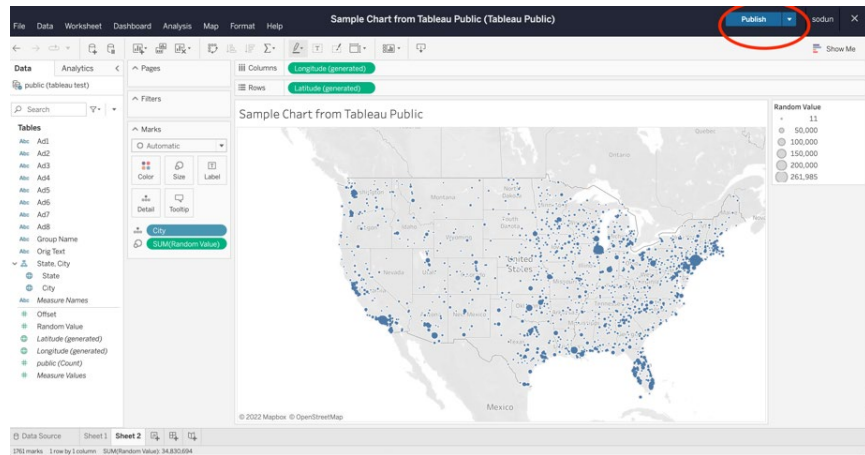
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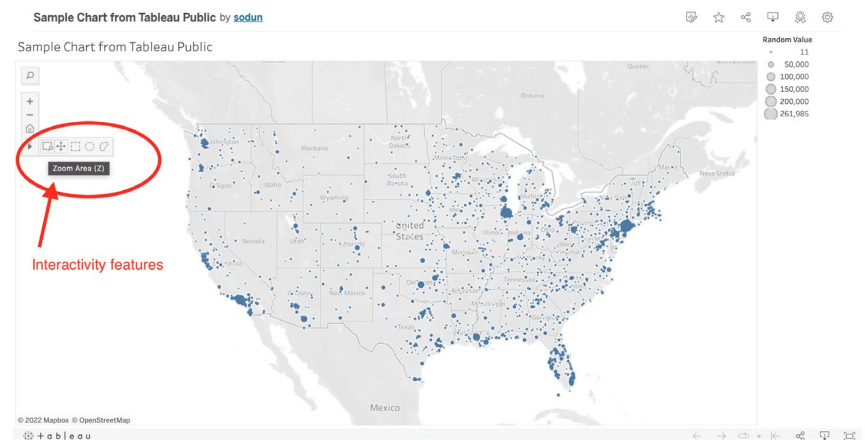
	<p><u>Answer deeper questions</u></p> <p>Exceptional analytics demand more than a pretty dashboard. Quickly build powerful calculations from existing data, drag and drop reference lines and forecasts, and review statistical summaries. Make your point with trend analyses, regressions, and correlations for tried and true statistical understanding. Ask new questions, spot trends, identify opportunities, and make data-driven decisions with confidence.</p> <p>https://www.tableau.com/products/desktop</p>
<p>[7(e)] transmitting the interactive chart to a second website for display in response to generation of the interactive chart, wherein:</p> <p>[7(f)] the interactive chart is displayed via the second website without generating the user interface of the first website,</p> <p>[7(g)] the second website receives an input from a second user, and the interactive chart is updated after the second website receives the input.</p>	<p><i>Tableau and its customers perform the step of transmitting the interactive chart to a second website for display in response to generation of the interactive chart wherein the interactive chart is displayed via the second website without generating the user interface of the first website, and the second website receives an input from a second user, and the interactive chart is updated after the second website receives the input.</i></p> <p><i>The software executed on Tableau’s servers (e.g., Tableau Cloud and Tableau Public) publish or allow interactive charts to be embedded in a second website in absence of the user interface from the first website. When the second website receives input from a second user, the interactive chart is updated.</i></p> <p><i>The software executed on Tableau’s customers’ servers (e.g., Tableau Server) publish or allow interactive charts to be embedded in a second website in absence of the user interface from the first website. When the second website receives input from a second user, the interactive chart is updated.</i></p> <p><i>See claim 7(a) for user interface of the first website.</i></p> <p><i>Tableau Accuse Products allow ‘publishing’ charts using either Tableau Public, Tableau Server, or Tableau Cloud. A user’s license determines what they have access to. Tableau Public is available for free. Tableau Platform provides several user interfaces, e.g., Tableau browser UI or Tableau Desktop UI, to invoke the sharing module’s capabilities.</i></p> <p><i>The interactive chart created in the example below can be published by clicking on the “Publish” button shown below using Tableau Public.</i></p>

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The “**published**” interactive chart is shown below as seen on a second website.



By selecting a zoom function (as shown above), the published interactive chart can be modified without using the user interface on the first website, as shown below.

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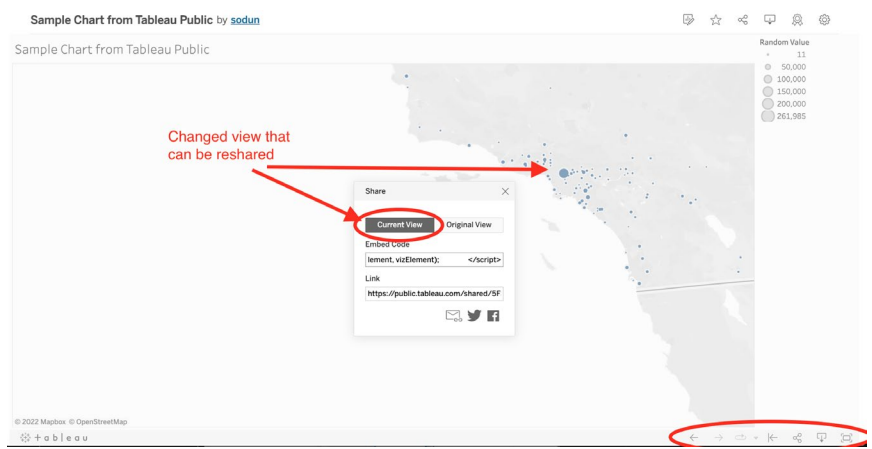
	<div data-bbox="555 306 1421 751"></div> <p>The operation of Tableau Public was further verified by inspecting the code transmitted between the two websites to confirm that the re-rendering of the chart shown above is performed entirely by code executed on the client computer and the second website, without generating the user interface of the first website.</p> <p>Sample code (the first part in red is the viz ID which identifies the particular visualization object on the Tableau Public server. The visualization object is the meta-data-file containing all relevant meta-data. The second part in red is the actual code that gets pulled into the web page in real-time when the page is opened. The code then pulls in the meta-data, renders the charts and processes all interactivity commands):</p> <pre>----- <div class='tableauPlaceholder' id='viz1645577202124' style='position: relative'><noscript></noscript><object class='tableauViz' style='display:none;'><param name='host_url' value='https%3A%2F%2Fpublic.tableau.com%2F' /> <param name='embed_code_version' value='3' /> <param name='path' value='shared&Y8BRZW9G5' /> <param name='toolbar' value='yes' ><param name='static_image' value='Y8&Y8BRZW9G5&1.png' > <param name='animate_transition' value='yes' /><param name='display_static_image' value='yes' /><param name='display_spinner' value='yes' /><param name='display_overlay' value='yes' /><param name='display_count' value='yes' /><param</pre>
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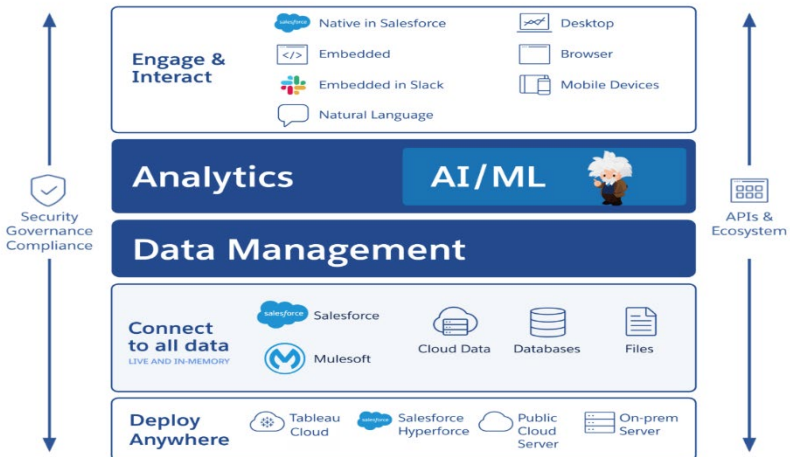
Exhibit B

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	<pre>name='tabs' value='no' /></object></div> <script type='text/javascript'> var divElement = document.getElementById('viz1645577202124'); var vizElement = divElement.getElementsByTagName('object')[0]; vizElement.style.width='1000px';vizElement.style.height='1027px'; var scriptElement = document.createElement('script'); scriptElement.src = 'https://public.tableau.com/javascripts/api/viz_v1.js'; vizElement.parentNode.insertBefore(scriptElement, vizElement); </script></pre> <p>-----</p> <p><i>Tableau Cloud and Tableau Server operate in substantially the same way as Tableau Public in allowing users to “publish” or embed interactive charts as self-contained and independent electronic documents that can be opened in a program and re-rendered based on user input as a perimeter in the absence of the generation module and the chart template module, enabling the interactive chart to retain interactivity when published or embedded.</i></p> <p><i>For example, the below Tableau Platform diagram also shows that the difference in Tableau Cloud and Tableau Server is a deployment choice. So, for our claim elements, there is no architectural or functionality difference.</i></p> <p>https://www.tableau.com/products/our-platform</p>
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<https://community.tableau.com/s/news/a0A4T000002fQt1UAE/tableau-cloud-vs-tableau-server-a-guide-on-how-to-compare-server-and-cloud>

What are the major differences between Tableau Online and Tableau Server

- **Tableau Online** is cloud based Software as a Service (SaaS). The hardware and systems that install and maintain Tableau Online are fully managed by Tableau. Upgrades and site backups are all handled by Tableau. Tableau Online sites get the latest product version with its new features as soon as it is available! There is no action required on the customer's side for upgrades and site backups. (For good practice we would recommend having backup copies of workbooks/data sources/flows in the event of accidental deletion by one of your users)
- **Tableau Server** is installed and maintained by the license holder. They are responsible for the hardware and processes to run Tableau Server. It can be installed inside or outside of a company firewall. Upgrades and backups are handled by you as the license holder. You would be responsible for planning and managing an upgrade and maintaining backups of your Tableau Server. Depending on your internal resources and deployment processes this may mean the version of Tableau

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	<p>Server you use day to day may lag behind what the latest version available is.</p> <p>https://help.tableau.com/current/blueprint/en-us/bp_server_architecture.htm</p> <p><u>Tableau Server</u></p> <p>Tableau Server provides a full modern analytics platform for your users. Tableau’s architecture is flexible, allowing you to run the platform just about anywhere. You can install Tableau Server on-premises, in your private cloud or data center, on Amazon EC2, Google Cloud Platform, MS Azure, or Alibaba Cloud. Tableau Server can also run on virtualization platforms.</p> <p>Multiple server processes work together to provide services in various tiers. To learn how the processes work together, see Tableau Server Processes on Tableau Public. Because Tableau Server integrates with a number of components in your IT infrastructure, it's important to understand how Tableau Server integrates with your IT infrastructure. For more information on processes, see Tableau Server Processes (Windows Linux). To learn more about Tableau Server processes as deployed in the reference architecture for the minimal enterprise-appropriate Tableau Server deployment, visit Part 2 of the Tableau Server Deployment Guide: Part 2 - Understanding the Tableau Server Deployment Reference Architecture.</p> <p><u>Tableau Cloud</u></p> <p>Tableau Cloud is a software-as-a-service (SaaS) deployment built to scale to serve thousands of sites with thousands of geographically distributed users within a multi-tenant (shared compute) environment. Tableau Cloud takes advantage of high availability features available in the product and cloud architecture best practices to deliver a reliable experience. Tableau Cloud supports a hybrid data architecture with a mix of networks, including on-premises, private cloud, and public cloud.</p> <p>-----</p> <p>Tableau Cloud, Server, Or Desktop Example: https://help.tableau.com/current/pro/desktop/en-us/buildmanual_dragging.htm</p>
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U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

	<p><u>Start Building a Visualization by Dragging Fields to the View</u></p> <p><i>Applies to: Tableau Cloud, Tableau Desktop, Tableau Server</i></p> <p>Then click on “Use Show Me to Start a View”: https://help.tableau.com/current/pro/desktop/en-us/buildauto_showme.htm</p> <p>Use Show Me to Start a View [...]</p> <p>Step 8: Share your findings</p> <p>You've done a bunch of work—great work—to learn that Burlington, North Carolina needs some fine tuning. Let's share this information with your teammates.</p> <p>Before you continue, select an option below:</p> <p>If you or your company does not use Tableau Server, or if you want to learn about a free, alternative sharing option, jump to Use Tableau Public.</p> <p>If you or your company uses Tableau Server, and you are familiar with what permissions are assigned to you, jump to Use Tableau Server.</p> <p>Share web content: https://help.tableau.com/current/pro/desktop/en-us/shareworkbooks.htm</p> <p><u>Share Web Content</u></p> <p><i>Applies to: Tableau Cloud, Tableau Server</i></p> <p>Share projects, collections, workbooks, views, metrics, data sources, and flows either directly with other users or by copying a link to the content. For views and metrics, you can also copy code to embed them in a webpage. (The legacy Metrics feature was retired in February 2024 for Tableau Cloud and will be retired in Tableau Server version 2024.2. For more information, see Create and Troubleshoot Metrics (Retired).)</p>
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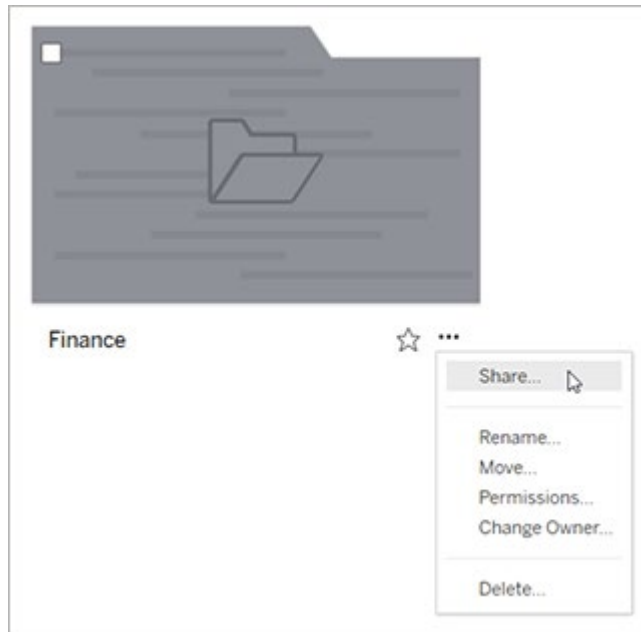
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Share directly with other users

When you share content directly with other users on your site, they receive a notification with a link to that content. The content is also added to their Shared with Me page, so they can easily find it later. Notifications can come by email, in Tableau’s in-app notifications center, or in the Tableau for Slack app if the site is connected to a Slack workspace. For more information, see [Manage Your Account Settings](#) and [Receive Notifications, Search, and Share Using the Tableau App for Slack](#).

1. Open the Actions (...) menu for the content you want to share.
2. Select **Share** from the menu.



3. Under **Share with people**, enter at least one user name. When you type, names that match your text appear.

Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

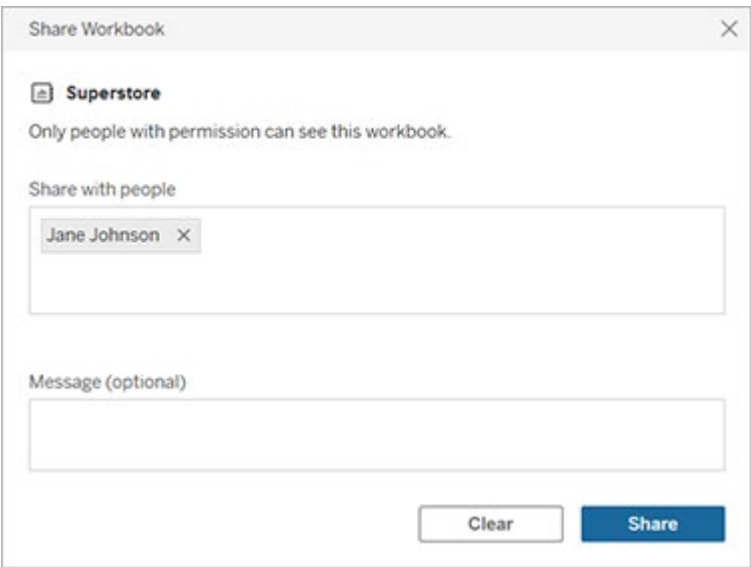
	<div data-bbox="656 310 1403 873"></div> <div data-bbox="602 905 1377 1003"><ol style="list-style-type: none">4. Under Message, enter an optional note to your recipients.5. Click the Share button.</div> <div data-bbox="561 1073 943 1104"><p><u>Grant access to shared content</u></p></div> <div data-bbox="561 1138 1416 1205"><p>To access the content you share with them, users must have permission to view that content on Tableau Server or Tableau Cloud.</p></div> <div data-bbox="561 1239 1416 1442"><p>If you control permissions for the content, you can grant access when you share it. If any of the users you shared with don't have the ability to view the content, the option to grant access will appear automatically after you share. You can only grant the capabilities for the view template via the grant access dialog. To grant users other permission capabilities, follow the instructions on Set permissions.</p></div> <div data-bbox="561 1476 1416 1610"><p>If you don't have the ability to set permissions for the content, the users you share with will be able to request access upon opening the link to the shared content. Their request for access is sent to the user who controls permissions for the content.</p></div>
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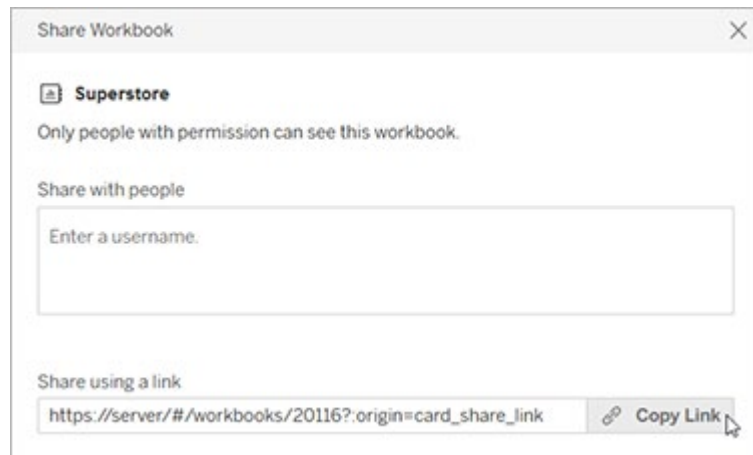
Exhibit B

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Copy a link to share

Copy the link generated for a piece of content to share without sending an email to specific users.

1. Open the Actions (...) menu for the content you want to share.
2. Select **Share** from the menu.
3. Click the **Copy Link** button, then paste the link into an application to share it with others.



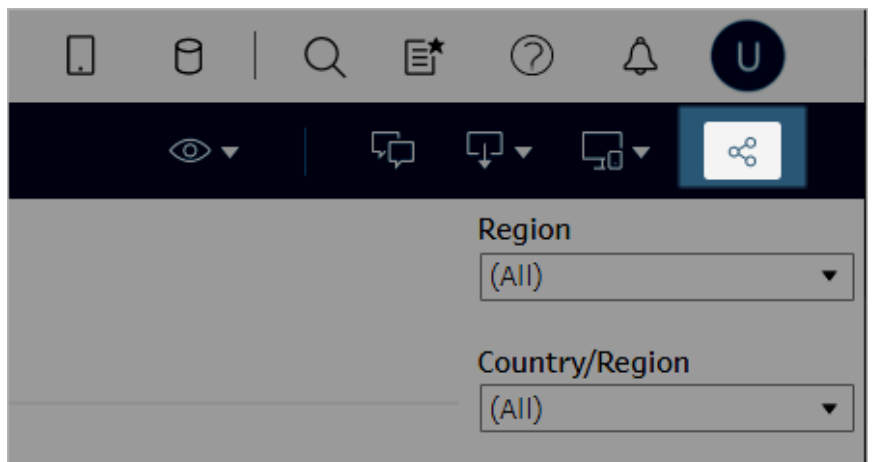
Tip: If you don't see the **Sharing using a link** option, clear any names from under **Share with people**.

Share and embed views and metrics

In addition to the sharing options listed above, views have unique options available when you click the Share button on the toolbar for a view. You can share a view that you have modified, and you can get the embed code for a view.

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You can also embed metrics by copying the embed code from the share dialog.

Embed views and metrics

1. Click **Share** in the toolbar for the view you want to embed or on the metric you want to embed.
2. Click **Copy Embed Code**, then paste the embed code into the source code for the webpage where you want to embed the view.

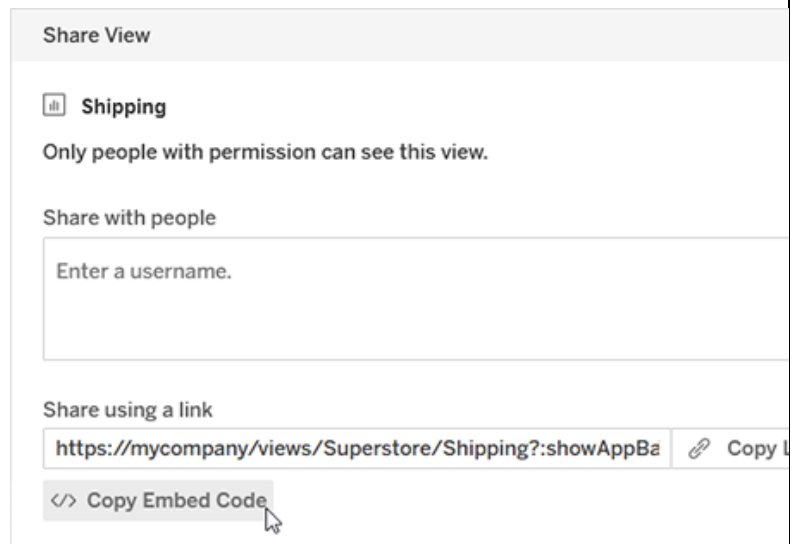


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For more information, see [Embed Views into Webpages](#) or [Embed Metrics into Webpages \(Retired\)](#).

Share modified or custom views

If you modify a view, by selecting marks or filters, Tableau captures these modifications by generating a unique link when you click the Share button. This unique link replaces the link to the original view for all sharing and embedding options. That way, the people you share with will see exactly what you were seeing when you shared.

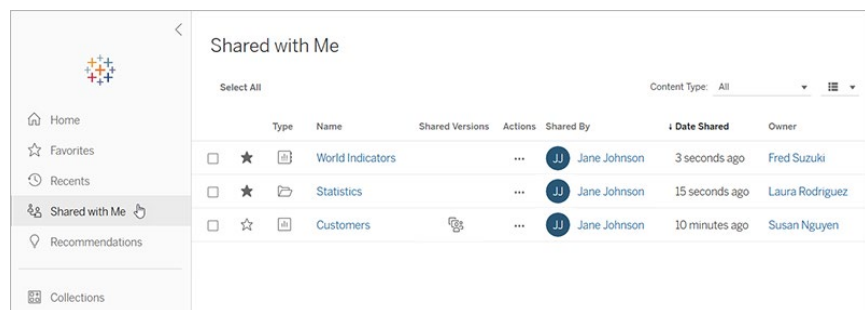
The link generated for a modified view expires two years after it was last accessed, or two years after it was created if never accessed.

To share a custom view that you have saved, simply open the custom view and use any sharing option.

Find content shared with you

You receive a notification message when someone shares content with you directly, either as an email, on your Tableau site by selecting the bell icon in the upper right corner, or in a connected Slack workspace with the Tableau for Slack app.

The Shared with Me page, accessed from the navigation pane, stores items that have been shared with you. The most recently shared items also appear in the Shared with Me channel on the Home page. Each item shows who it was shared by, the date it was shared, and any message added by the sharer.



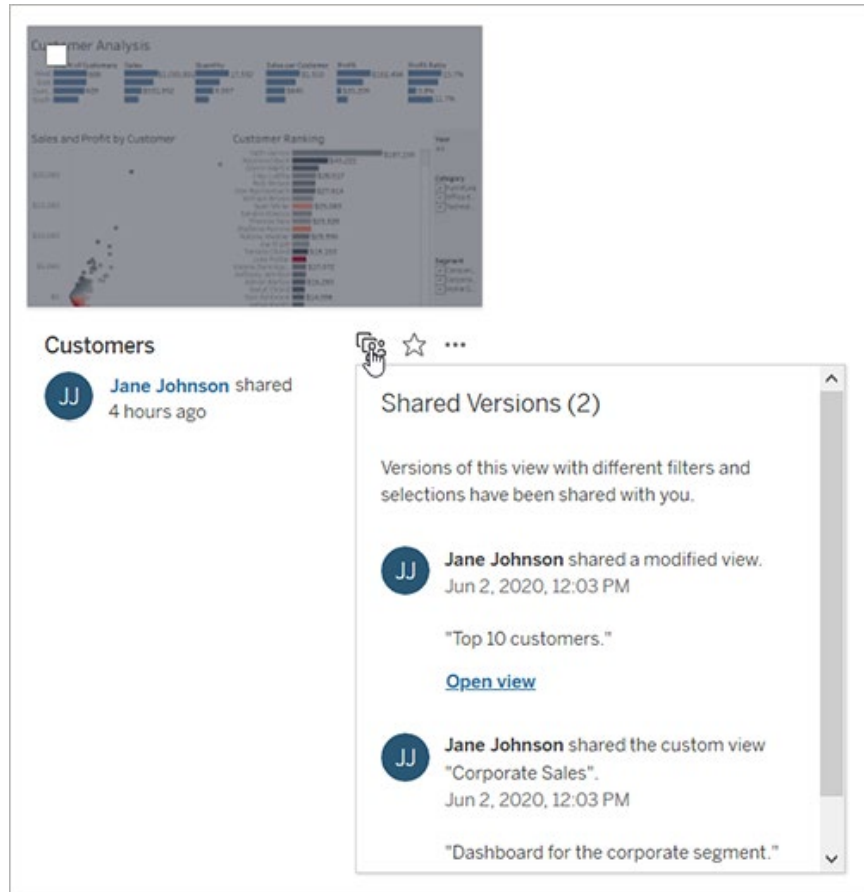
Type	Name	Shared Versions	Actions	Shared By	Date Shared	Owner
☐ ★	World Indicators		...	Jane Johnson	3 seconds ago	Fred Suzuki
☐ ★	Statistics		...	Jane Johnson	15 seconds ago	Laura Rodriguez
☐ ☆	Customers		...	Jane Johnson	10 minutes ago	Susan Nguyen

If an item has been shared with you multiple times, the information shown is for the most recent share. Views include additional information if multiple versions of the view have been shared with

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you. Custom views, modified views, and the original view all appear with unique details and links under **Shared Versions**.



Share and collaborate in the cloud



Tableau Online is your analytics platform fully hosted in the cloud. **Publish dashboards and share your discoveries with anyone.** Invite colleagues or customers to explore hidden opportunities

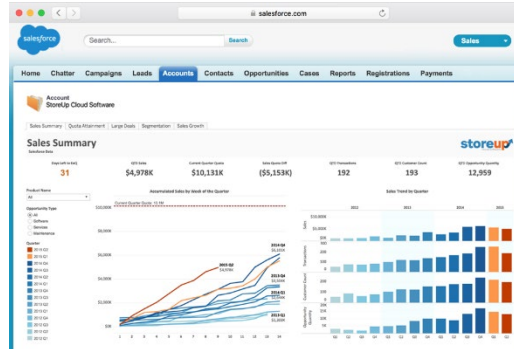
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with interactive visualizations and accurate data. All easily accessible from a browser or on the go with our mobile apps.

[...]

Access anywhere, **embed** everywhere



Give external teams, partners, and clients simple and secure access to analytics, no virtual private networks required. **Easily embed interactive dashboards on the web and within apps** like Salesforce in just a few clicks.

[...]

Empowering organizations with **data**

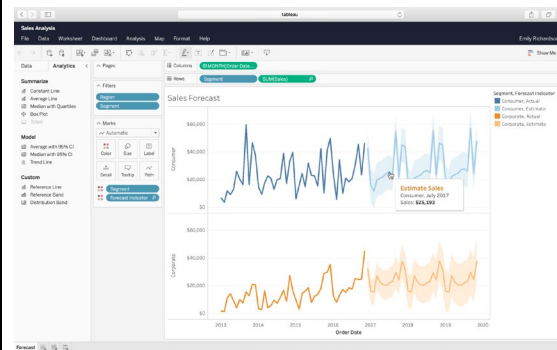


Tableau Online enables everyone in an organization to see and understand data, with offerings for every user type. Starting with casual users looking to make data driven decisions from a published dashboard, data enthusiasts who want to use web authoring to ask new questions from published data source, to data geeks who want to create and **share their vizzes and data sources with the rest of the organization.**

Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

<https://www.tableau.com/products/cloud-bi>

Let everyone in on it



Ditch the static slides for **live stories that others can explore**. Create a compelling narrative that empowers everyone you work with to ask their own questions, analyzing interactive visualizations with fresh data. Be part of a culture of **data collaboration**, extending the impact of your insights.

[...]

Sharing and collaborating securely

Communicate with data in a whole new way. **Share visualizations and underlying data securely** using Tableau Server or Tableau Online. Create an environment where **everyone in your organization can share and collaborate on trusted data**.

<https://www.tableau.com/products/desktop>

Tableau Online is your analytics platform fully hosted in the cloud.

[...]

Data management

Centralize access to your data in the cloud. **Publish data models** and make it easy for everyone to work from a curated, single source of truth.

[...]

Exhibit B

U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

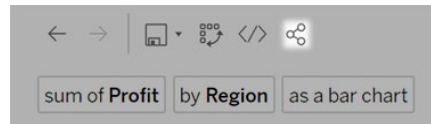
Share in seconds

Share a dashboard with a **few clicks** to start a conversation around data with your team. **Comment and interact live on the web** and on mobile devices.

<https://www.tableau.com/trial/tableau-online>

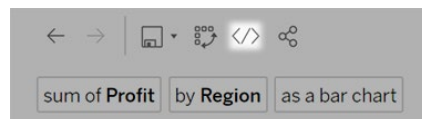
Share links to Ask Data vizzes

You can quickly **share Ask Data vizzes** without even saving a sheet. Simply click the link icon above the query box, and copy a link viewable by anyone with access to the data source.



Embed Ask Data in a web page

After you ask a question with Ask Data, an Embed Code icon appears in the toolbar. Click it to copy code you can **incorporate into any web page**.



https://help.tableau.com/current/pro/desktop/en-us/ask_data.htm

Tableau Help > Tutorial: Get Started with Tableau Desktop > Step 8:
Share your findings with others [...]

3. From the menu, select Share.

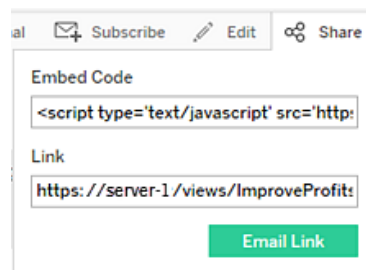


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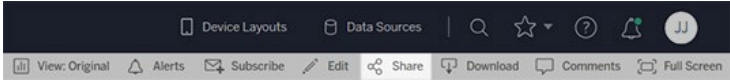
	<p>4. How do you want to share your story?</p> <ol style="list-style-type: none">Embed on your website: Copy the Embed Code and paste it in your web page HTML.Send a link: Copy the Link and send to your colleagues.Send an email using your default email client: Click the email icon. <p>https://help.tableau.com/current/guides/get-started-tutorial/en-us/get-started-tutorial-share.htm</p> <p>Tableau Help > Tableau Desktop and Web Authoring Help > ... > Embed Views and Dashboards > Embed Views into Webpages [...]</p> <p>You can embed interactive Tableau views and dashboards into web pages, blogs, wiki pages, web applications, and intranet portals. Embedded views update as the underlying data changes, or as their workbooks are updated on Tableau Server or Tableau Online. [...]</p> <p>You can do the following to embed views and adjust their default appearance:</p> <ul style="list-style-type: none">Get the embed code provided with a view: The Share button at the top of each view opens a dialog from which you can copy the embed code and paste into your webpage. (The Share button doesn't appear in embedded views if you change the showShareOptions parameter to false in the code.)  <ul style="list-style-type: none">Customize the embed code: You can customize the embed code using parameters that control the toolbar, tabs, and more. For more information, see Parameters for Embed Code.Use the Tableau JavaScript API: Web developers can use Tableau JavaScript objects in web applications. To get access to the API, documentation, code examples, and the Tableau developer community, see the Tableau Developer Portal.
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	<p>https://help.tableau.com/current/pro/desktop/en-us/embed.htm</p> <p>Tableau Help > Tableau Desktop and Web Authoring Help > ... > Build Data Views from Scratch > Add Interactivity using Actions</p> <p>Actions [...]</p> <p>Add context and interactivity to your data using actions. Users interact with your visualizations by selecting marks, or hovering, or clicking a menu, and the actions you set up can respond with navigation and changes in the view.</p> <p>For example, in a dashboard showing home sales by neighborhood, you could use actions to display relevant information for a selected neighborhood. Selecting a neighborhood in one view can trigger an action that highlights the related houses in a map view, filters a list of the houses sold, then opens an external web page showing census data for the neighborhood. [...]</p> <p>Here's how you use the different types of actions:</p> <ul style="list-style-type: none">• Filter. Use the data from one view to filter data in another to help guide analysis.• Highlight. Call attention to marks of interest by coloring specific marks and dimming all others.• Go to URL. Create hyperlinks to external resources, such as a web page, file, or another Tableau worksheet.• Go to Sheet. Simplify navigation to other worksheets, dashboards, or stories.• Change Parameter. Let users change parameter values by directly interacting with marks on a viz.• Change Set Values. Let users change the values in a set by directly interacting with marks on a viz. <p>https://help.tableau.com/current/pro/desktop/en-us/actions.htm</p>
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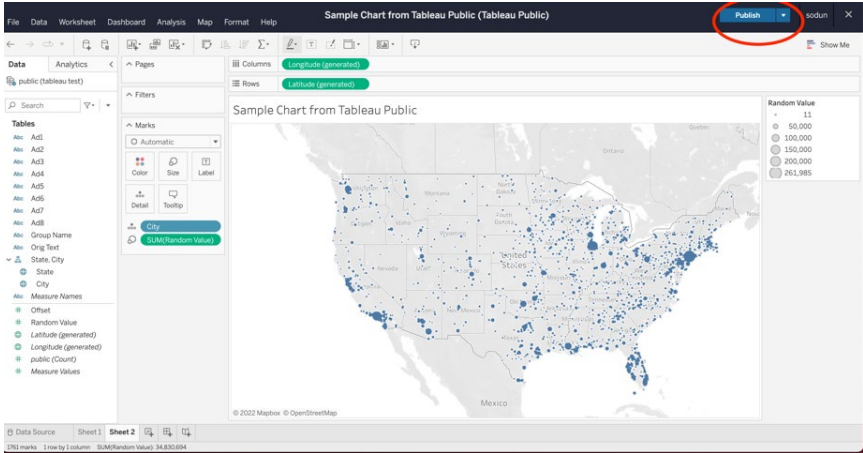
	<p>Tableau Public: https://public.tableau.com/app/discover</p> <p><u>Welcome to Tableau Public</u></p> <p>A free platform to explore, create, and publicly share data visualizations online.</p>
<p>8. The method of claim 7, wherein the user interface includes a chart pane that displays the generated interactive chart.</p>	<p><i>The user interface of claim 7 further includes a chart pane that displays the generated interactive chart.</i></p> <p><i>The software executed on Tableau’s servers provides a user interface having chart pane through Tableau Cloud and Tableau Public, which reside on Tableau’s servers.</i></p> <p><i>The software executed on Tableau’s customers’ servers provides a generation interface having a chart pane through Tableau Server.</i></p> <p><i>See also claim 7(c) for the step of generating an interactive chart including the chart data and the chart template.</i></p> <p><i>Tableau Accused Products provide a user interface that includes a chart pane that displays the generated interactive chart.</i></p> <p><i>As shown below, the user interface displayed by Tableau Public includes a chart pane (e.g. the map of the US) that displays the generated interactive chart as shown below.</i></p>  <p>The screenshot shows the Tableau Public web interface. At the top, there's a navigation bar with 'File', 'Data', 'Worksheet', 'Dashboard', 'Analysis', 'Map', 'Format', and 'Help'. A 'Publish' button is circled in red. Below the navigation bar, there's a 'Data' pane on the left showing a list of tables and fields. The main area displays a map of the United States with numerous blue data points. A legend on the right indicates 'Random Value' with a scale from 0 to 251,985. The bottom status bar shows '2761 marks' and '1 row by 1 column'.</p>

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	<p><i>Additionally, the user interface displayed by Tableau Public includes a data pane (e.g. the Data tab on the left of the image). When chart data has been dragged from the data pane and dropped into the chart pane, the chart is updated to include the data, as shown above. Thus, the user interface displays the generative interactive chart.</i></p> <p><i>Tableau Public and Tableau Cloud operate in substantially the same way in displaying a chart pane to a user.</i></p> <p>https://www.tableau.com/products/public</p> <p>Note: Tableau public is the free version of Tableau Cloud - fully hosted solution by Tableau.</p> <p><i>Tableau Public is a free platform to explore, create and publicly share data visualizations online. With the largest repository of data visualizations in the world to learn from, Tableau Public makes developing data skills easy. Advance your career in analytics by learning from limitless data inspiration and creating an online portfolio of work.</i></p> <p>✓</p> <p>Share publicly A platform for public (not private) data. Published visualizations are available for anyone to see online.</p> <p>✓</p> <p>Free with few limits Explore and contribute to the millions of visualizations on Tableau Public. Data refresh is limited.</p> <p>✓</p> <p>Fully hosted Tableau Public vizs can handle millions of viewers. All infrastructure is managed by us at no cost.</p>
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U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

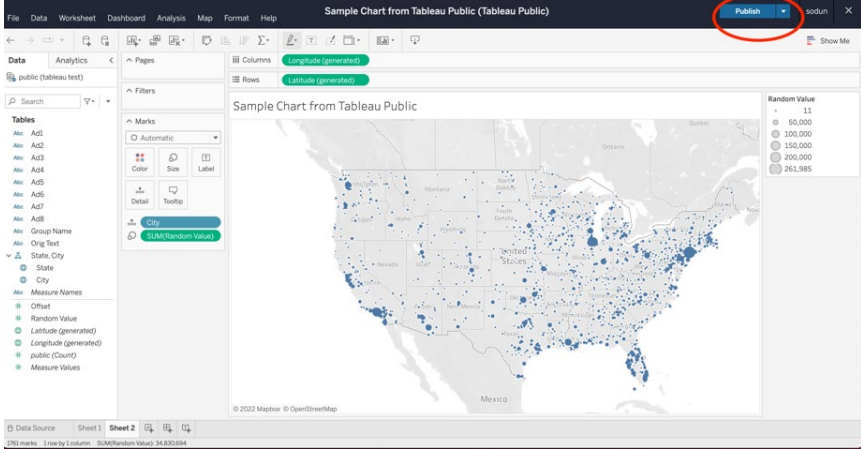
	<p><i>As explained above, Tableau Cloud and Tableau Server operate in substantially the same in displaying an interactive chart in the chart pane to a user.</i></p>
<p>9[pre]. The method of claim 8, the method further comprising:</p> <p>[9(a)] receiving an indication that the chart data has been dragged from a data pane in the user interface and dropped into the chart pane; and</p> <p>[9(b)] generating the interactive chart after the chart data is dropped into the chart pane.</p>	<p><i>Tableau and its customers further perform the step of receiving an indication that the chart data has been dragged from a data pane in the user interface and dropped into the chart pane; and generating the interactive chart after the chart data is dropped into the chart pane.</i></p> <p><i>The software executed on Tableau’s servers receive an indication that the chart data has been dragged from a data pane in the user interface and dropped into the chart pane; and generate the interactive chart after the chart data is dropped into the chart pane.</i></p> <p><i>The software executed on Tableau’s customers’ servers receive an indication that the chart data has been dragged from a data pane in the user interface and dropped into the chart pane; and generate the interactive chart after the chart data is dropped into the chart pane.</i></p> <p>The user interface displayed by Tableau Cloud(Online), Tableau Public and Tableau Sever also includes a data pane (e.g. the Data tab on the left of the image). When chart data has been dragged from the data pane and dropped into the chart pane, the chart is updated to include the data as shown below. This is indicated, for example, by including the selected data in the Columns and Rows fields above the chart pane.</p> 

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Start Building a Visualization by Dragging Fields to the View

Applies to: Tableau Cloud, Tableau Desktop, Tableau Server

The basic structure for every view is made of dimension and measure fields placed on the Rows and Columns shelves, and on different properties in the Marks card.

You build visualizations by adding fields from the Data pane to the view. As you build a visualization, you can add as many fields as necessary to different areas of the view, and then move those fields around as you explore your data.

Different ways to start building a view

When you build a view, you add fields from the **Data** pane. You can do this in different ways. For example:

- Drag fields from the **Data** pane and drop them onto the cards and shelves that are part of every Tableau worksheet.
- Double-click one or more fields in the **Data** pane.
- Select one or more fields in the **Data** pane and then choose a chart type from **Show Me**, which identifies the chart types that are appropriate for the fields you selected. For details, see [Use Show Me to Start a View](#).
- Drop a field on the **Drop field here** grid, to start creating a view from a tabular perspective.



As you start exploring data in Tableau, you will find there are many ways to build a view. Tableau is extremely flexible, and also very forgiving. As you build a view, if you ever take a path

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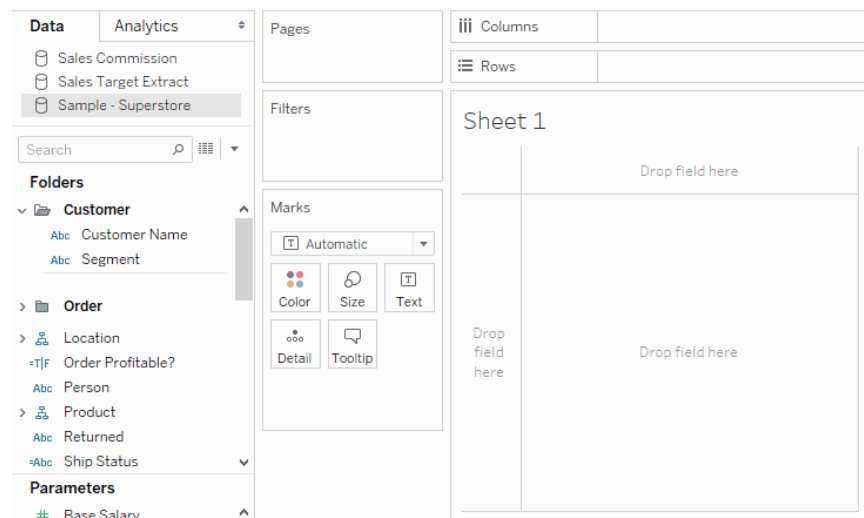
U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

that isn't answering your question, you can always undo to a previous point in your exploration.

- To undo or redo, click undo ⬅ or redo ➡ on the toolbar.
- You can undo all the way back to the last time you opened the workbook. You can undo or redo an unlimited number of times.

Dragging basics

When you begin creating a new data view on a blank worksheet, you can drag a field from the **Data** pane and drop it directly into the view, rather than to a shelf.



In Tableau Desktop, while dragging fields, you can hover over the different areas in the view to see how the field will be incorporated into the structure of the view. For example, dimensions typically add a row and column headers to the view, while measures add continuous axes. Below are some examples of how fields can be added to the view.

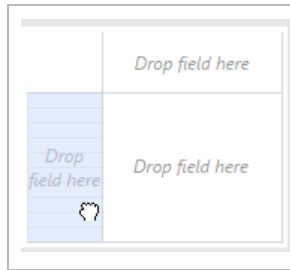
Dimensions add headers

Measures add axes

Show Me automatically adds the field according to best practices

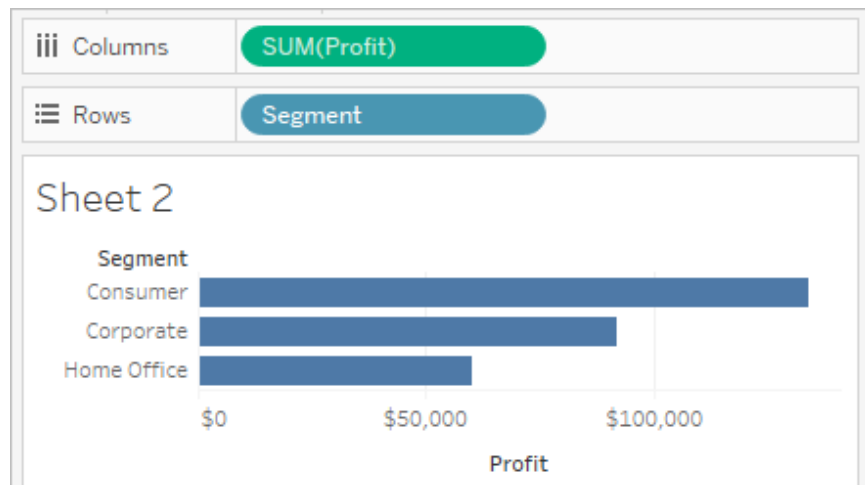
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For a more advanced discussion of dimensions and measures, see [Dimensions and Measures, Blue and Green](#).

When you drop a field on one of the active areas in the view, the field is added to the view and also to one of the shelves or cards. For example, in the view below the **Segment** dimension was added to the **Rows** shelf and the **Profit** measure was added to the **Columns** shelf—and automatically aggregated so that the values in the data are summed.



You can, of course, also drag fields directly to the shelves instead of to the active areas in the view. You can also drag fields from one shelf to another shelf. To remove a field from a shelf, drag it off the worksheet or select **Remove** from the field's menu (available when you right-click (control-click on Mac) a field in the view). In Tableau Desktop, you can also quickly remove multiple fields from a shelf by right-clicking (control-click on Mac) the shelf and selecting **Clear Shelf**.

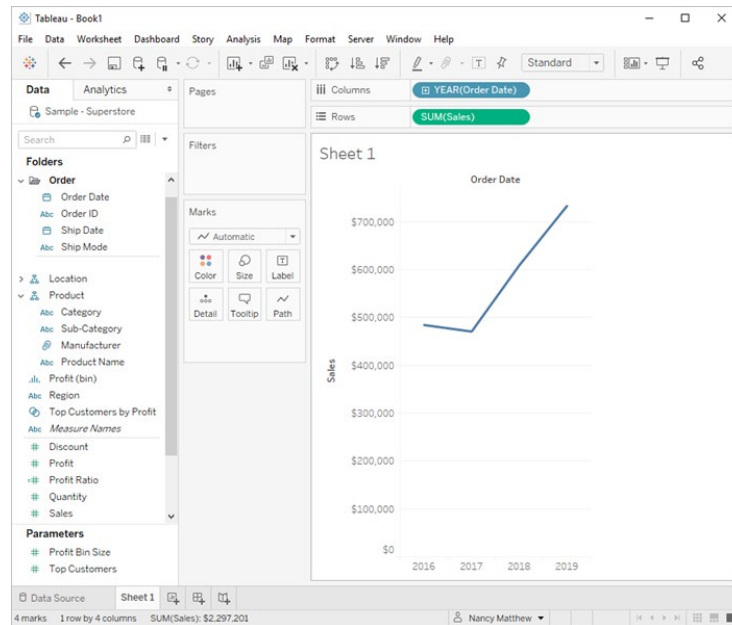
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	<p><i>Tableau Cloud, Server, Or Desktop Example:</i> https://help.tableau.com/current/pro/desktop/en-us/buildmanual_dragging.htm</p> <p><u>Start Building a Visualization by Dragging Fields to the View</u></p> <p><i>Applies to: Tableau Cloud, Tableau Desktop, Tableau Server</i></p> <p>Then click on “Use Show Me to Start a View”:https://help.tableau.com/current/pro/desktop/en-us/buildauto_showme.htm</p> <p>Step 1: Start Building a Visualization by Dragging Fields to the View</p> <p><i>Applies to: Tableau Cloud, Tableau Desktop, Tableau Server</i></p> <p>Step 2: Drag and drop to take a first look [...]</p> <p><u>Create a view</u></p> <p>You set out to identify key areas for improvement, but where to start? With four years' worth of data, you decide to drill into the overall sales data to see what you find. Start by creating a simple chart. [...]</p> <ol style="list-style-type: none">1. From the Data pane, drag Order Date to the Columns shelf. Note: When you drag Order Date to the columns shelf, Tableau creates a column for each year in your data set. Under each column is an Abc indicator. This indicates that you can drag text or numerical data here, like what you might see in an Excel spreadsheet. If you were to drag Sales to this area, Tableau creates a crosstab (like a spreadsheet) and displays the sales totals for each year.2. From the Data pane, drag Sales to the Rows shelf. Tableau generates the following chart with sales rolled up as a sum (aggregated). You can see total aggregated sales for each year by order date.
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When you first you create a view that includes time (in this case Order Date), **Tableau automatically generates a line chart.**

<https://help.tableau.com/current/guides/get-started-tutorial/en-us/get-started-tutorial-drag.htm>

Ease of Use

Anyone can analyze data with **intuitive drag & drop products**. No programming, just insight.

<https://www.tableau.com/trial/tableau-software>

Tableau Desktop [...]

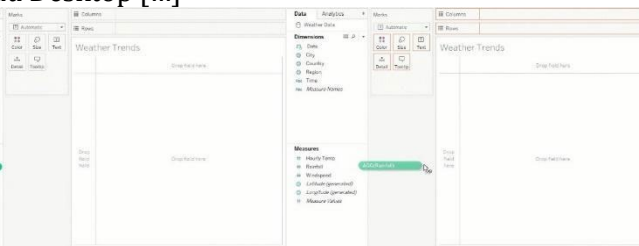


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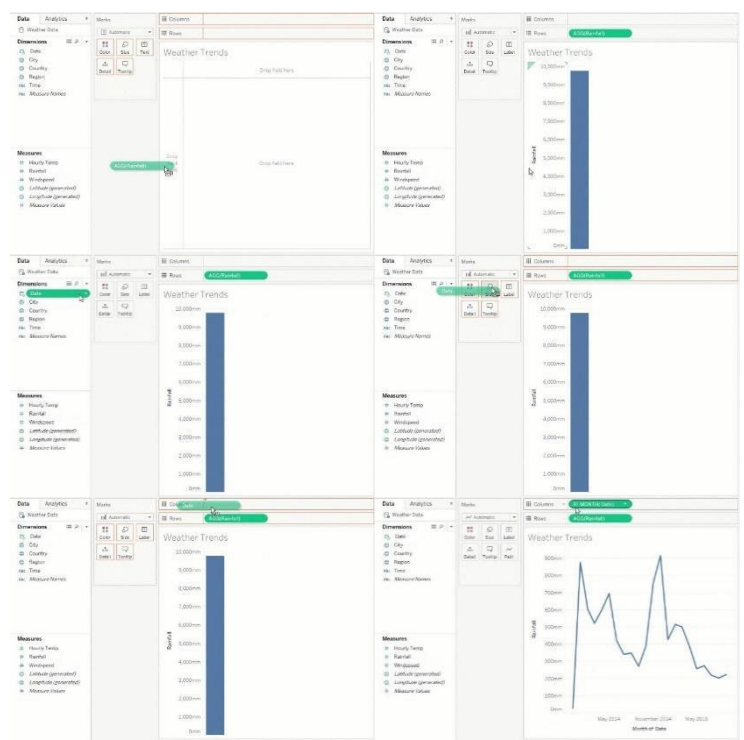
	 <p><u>Answer deeper questions</u></p> <p>Exceptional analytics demand more than a pretty dashboard. Quickly build powerful calculations from existing data, drag and drop reference lines and forecasts, and review statistical summaries. Make your point with trend analyses, regressions, and correlations for tried and true statistical understanding. Ask new questions, spot trends, identify opportunities, and make data-driven decisions with confidence.</p> <p>https://www.tableau.com/products/desktop</p>
<p>10. The method of claim 7, wherein the interactive chart retains one or more interactive features when displayed via the second website.</p>	<p><i>The interactive chart of claim 7 retains one or more interactive features when displayed via the second website.</i></p> <p><i>See claim 1(pre)-1(d), for elements of claim 1.</i></p> <p>https://www.tableau.com/learn/articles/interactive-map-and-data-visualization-examples (10 examples of interactive map data visualizations)</p>

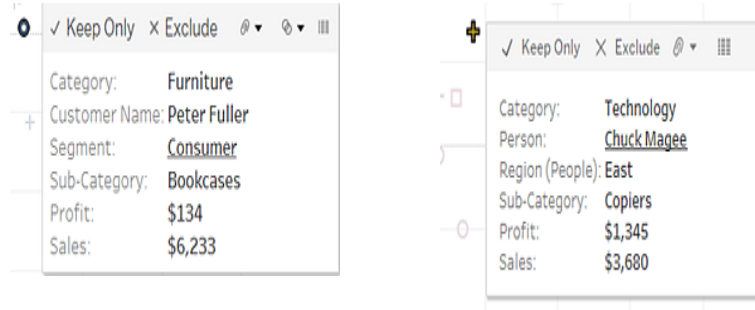
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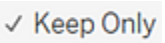
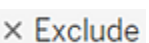
	<p>Tableau Help > Tableau Desktop and Web Authoring Help > Build Charts and Analyze Data > Explore and Inspect Data in a View</p> <p>https://help.tableau.com/current/pro/desktop/en-us/data_explore_analyze_interact.htm</p> <p><u>Explore and Inspect Data in a View</u></p> <p><i>Applies to: Tableau Cloud, Tableau Desktop, Tableau Server</i></p> <p>When you are ready to explore and analyze your view, Tableau offers a selection of dynamic data inspection tools that help you isolate the data of interest. For example, if you have a dense data view, you can focus on a particular region, select a group of outliers, and view the underlying data source rows for each mark.</p> <p><u>Select marks to highlight data points in the view</u></p> <p>The simplest way to add highlighting to a view is to select the marks you want to highlight. When you manually select a mark in the view, all other marks are dimmed to draw attention to the selection. Your selection is saved with the workbook.</p> <p>For more information on how to use selection tools, see Select marks(Link opens in a new window). Also see Legend Highlighting(Link opens in a new window), Highlight Data Points in Context(Link opens in a new window), Highlight Toolbar Button(Link opens in a new window), and Highlight Actions.</p> <p><u>Analyze selected marks using tooltips</u></p> <p>When you select one or multiple marks in a view, and then continue to hover in the same spot, several options for inspecting your data are available in the tooltip.</p> <p>Tableau Desktop version Web version</p>
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Tooltips provide additional information about the marks in your view, and provide the following data analysis options:

- Keep only the selected marks in the view.  For more information, see [Select to keep or exclude data points in your view](#)
- Exclude the selected marks from the view.  For more information, see [Select to keep or exclude data points in your view](#)
- [\(Link opens in a new window\)](#)
- Create a group based on the selected marks.  For more information, see [Correct Data Errors or Combine Dimension Members by Grouping Your Data](#)
- Create a set that contains the selected marks (Tableau Desktop only).  For more information, see [Create Sets](#)
- View the underlying data of the marks selected.  For more information, see [View Underlying Data](#)

For related information on Tooltips, see [Tooltips](#).

For details on related analysis tools, see [Zoom and Pan Views](#), and [Select Marks, Undo and Redo](#), and [Drop Lines](#).

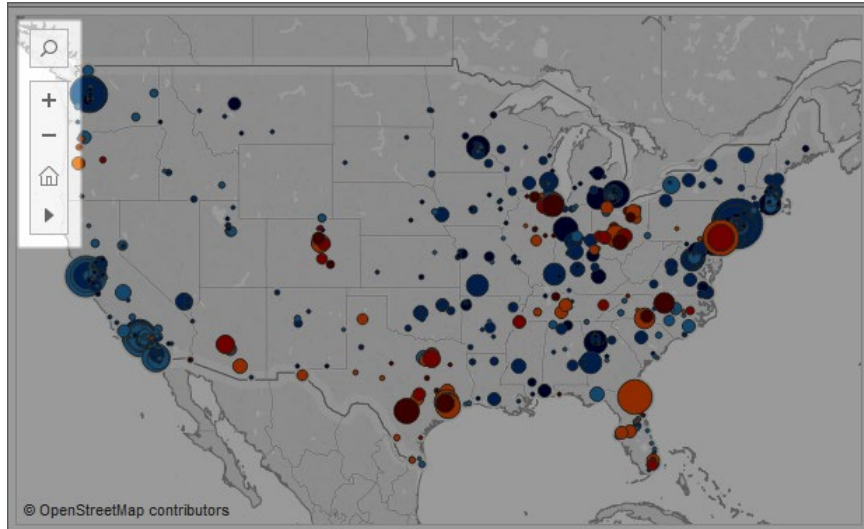
Explore data in maps

Tableau maps can help you quickly find locations and analyze data worldwide. There are many ways you can explore and interact with map views. You can zoom in and out, pan, and select marks with the

Exhibit B

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view toolbar, and even search for locations worldwide with map search.



For more details, see [Explore Data in Maps](#) , [Search for Locations in Your Map](#), and [Measure Distances Between Data Points and Locations in a Map](#).

https://help.tableau.com/current/pro/desktop/en-us/view_parts.htm

Parts of the View

Applies to: Tableau Desktop

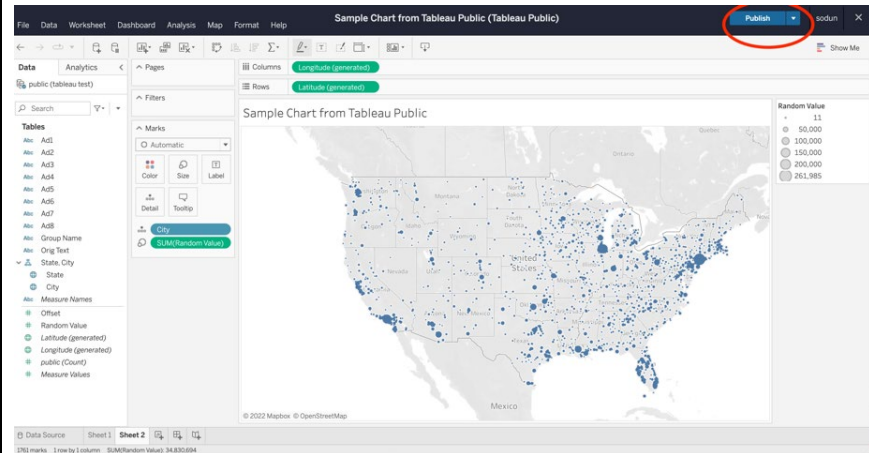
This section describes the basic elements of views that you can create in Tableau. You can show or hide parts of the view as needed (described below). Every view has a table in some form, which may include rows, columns, headers, axes, panes, cells, and marks. Views can optionally include tooltips, titles, captions, field labels, and legends.

Tableau Accused Products allow ‘publishing’ charts using either Tableau Public, Tableau Server, or Tableau Cloud. A user’s license determines what they have access to. Tableau Public is available for free. Tableau Platform provides several user interfaces, e.g., Tableau browser UI or Tableau Desktop UI that is webbased, to invoke the sharing module’s capabilities.

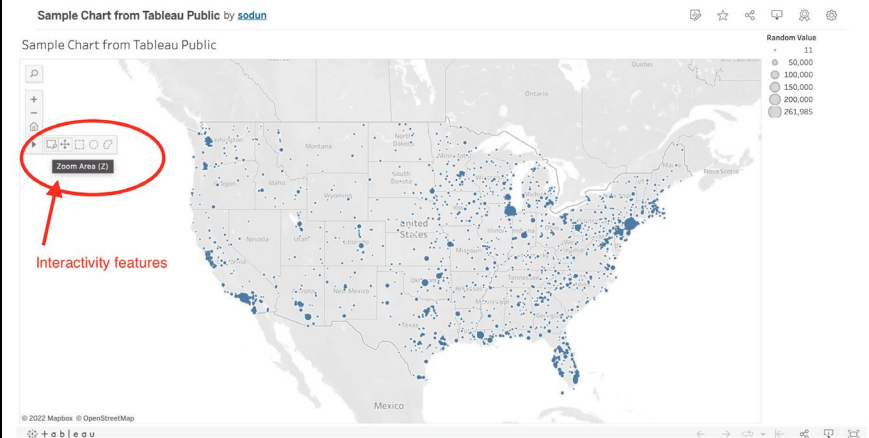
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As shown below the **interactive chart** created in the example below can be published by clicking on the “**Publish**” button shown below using Tableau Public.



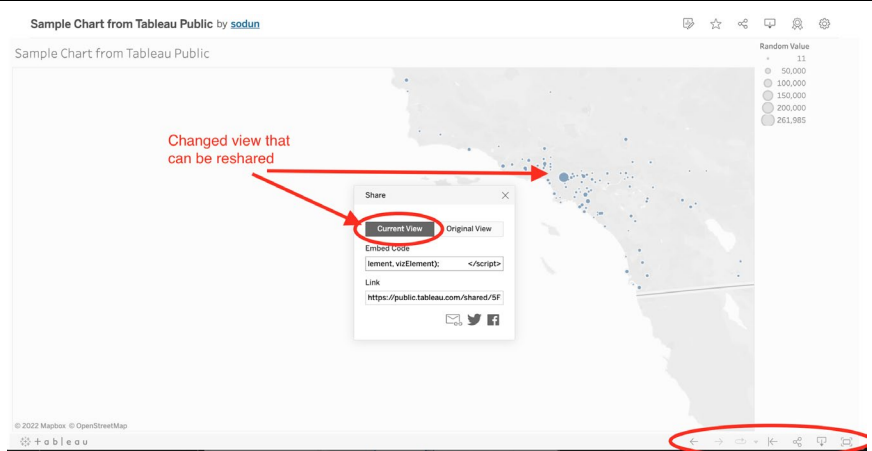
The “**published**” **interactive chart** is shown below as seen on a second website.



By selecting a zoom function (as shown above), the published **interactive chart** can be **modified without using the user interface** on the first website, as shown below. Thus, the second website receives an input from a second user and updates the interactive chart after the second website receives the input. Thus, the interactive chart retains its interactivity.

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The operation of the Tableau Public was further verified by inspecting the code transmitted between the two websites to confirm that the re-rendering of the chart shown above is performed entirely by code executed on the client computer and the second website for display, without the execution of the instructions stored in the memory to generate the user interface of the first website.

Sample code (the first part in red is the viz ID which identifies the particular visualization object on the Tableau Public server. The visualization object is the meta-data-file containing all relevant meta-data. The second part in red is the actual code that gets pulled into the web page in real-time when the page is opened. The code then pulls in the meta-data, renders the charts and processes all interactivity commands):

```
-----  
<div class='tableauPlaceholder' id='viz1645577202124' style='position:  
relative'><noscript><a  
href='http://www.curvediscussion.com/design-is-  
justification-mm44-bank-  
holidays/?pk_campaign=tp&pk_kwd=mm44'><img  
alt='BankHolidays ' src='Y8BRZW9G5;1_rss.png'  
style='border: none' /></a></noscript><object class='tableauViz'  
style='display:none;'><param name='host_url'  
value='https%3A%2F%2Fpublic.tableau.com%2F' /> <param  
name='embed_code_version' value='3' /> <param name='path'  
value='shared/Y8BRZW9G5' /> <param name='toolbar' value='yes'  
/><param name='static_image' value='Y8BRZW9G5;1.png'  
/> <param name='animate_transition' value='yes' /><param  
name='display_static_image' value='yes' /><param  
name='display_spinner' value='yes' /><param name='display_overlay'
```

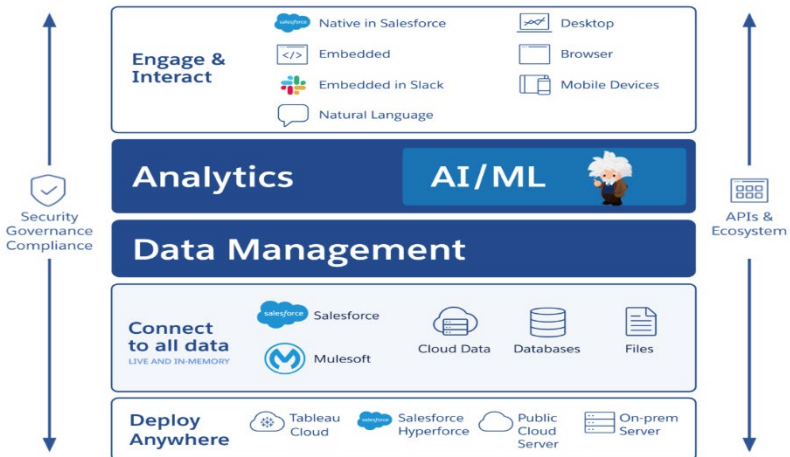
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U.S. Patent No. 9,712,595 “Creation, sharing and embedding of interactive charts”

	<pre>value='yes' /><param name='display_count' value='yes' /><param name='tabs' value='no' /></object></div> <script type='text/javascript'> var divElement = document.getElementById('viz1645577202124'); var vizElement = divElement.getElementsByTagName('object')[0]; vizElement.style.width='1000px';vizElement.style.height='1027px'; var scriptElement = document.createElement('script'); scriptElement.src = 'https://public.tableau.com/javascripts/api/viz_v1.js'; vizElement.parentNode.insertBefore(scriptElement, vizElement); </script></pre> <p>-----</p> <p><i>Tableau Cloud and Tableau Server operate in substantially the same way as Tableau Public in allowing users to “publish” or embed interactive charts as self-contained and independent electronic documents that can be opened in a program and re-rendered based on user input as a perimeter in the absence of the generation module and the chart template module, enabling the interactive chart to retain interactivity when published or embedded.</i></p> <p><i>For example, the below Tableau Platform diagram also shows that the difference in Cloud and Server is a deployment choice. So, for our claim elements, there is no architectural or functionality difference.</i></p> <p>https://www.tableau.com/products/our-platform</p>
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<https://community.tableau.com/s/news/a0A4T000002fQt1UAE/tableau-cloud-vs-tableau-server-a-guide-on-how-to-compare-server-and-cloud>

What are the major differences between Tableau Online and Tableau Server

- **Tableau Online** is cloud based Software as a Service (SaaS). The hardware and systems that install and maintain Tableau Online are fully managed by Tableau. Upgrades and site backups are all handled by Tableau. Tableau Online sites get the latest product version with its new features as soon as it is available! There is no action required on the customer's side for upgrades and site backups. (For good practice we would recommend having backup copies of workbooks/data sources/flows in the event of accidental deletion by one of your users)
- **Tableau Server** is installed and maintained by the license holder. They are responsible for the hardware and processes to run Tableau Server. It can be installed inside or outside of a company firewall. Upgrades and backups are handled by you as the license holder. You would be responsible for planning and managing an upgrade and maintaining backups of your Tableau Server. Depending on your internal resources and deployment processes this may mean the version of Tableau

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	<p>Server you use day to day may lag behind what the latest version available is.</p> <p>https://help.tableau.com/current/blueprint/en-us/bp_server_architecture.htm</p> <p><u>Tableau Server</u></p> <p>Tableau Server provides a full modern analytics platform for your users. Tableau’s architecture is flexible, allowing you to run the platform just about anywhere. You can install Tableau Server on-premises, in your private cloud or data center, on Amazon EC2, Google Cloud Platform, MS Azure, or Alibaba Cloud. Tableau Server can also run on virtualization platforms.</p> <p>Multiple server processes work together to provide services in various tiers. To learn how the processes work together, see Tableau Server Processes on Tableau Public. Because Tableau Server integrates with a number of components in your IT infrastructure, it's important to understand how Tableau Server integrates with your IT infrastructure. For more information on processes, see Tableau Server Processes (Windows Linux). To learn more about Tableau Server processes as deployed in the reference architecture for the minimal enterprise-appropriate Tableau Server deployment, visit Part 2 of the Tableau Server Deployment Guide: Part 2 - Understanding the Tableau Server Deployment Reference Architecture.</p> <p><u>Tableau Cloud</u></p> <p>Tableau Cloud is a software-as-a-service (SaaS) deployment built to scale to serve thousands of sites with thousands of geographically distributed users within a multi-tenant (shared compute) environment. Tableau Cloud takes advantage of high availability features available in the product and cloud architecture best practices to deliver a reliable experience. Tableau Cloud supports a hybrid data architecture with a mix of networks, including on-premises, private cloud, and public cloud.</p> <p>-----</p> <p>Tableau Cloud, Server, Or Desktop Example: https://help.tableau.com/current/pro/desktop/en-us/buildmanual_dragging.htm</p>
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	<p><u>Start Building a Visualization by Dragging Fields to the View</u></p> <p><i>Applies to: Tableau Cloud, Tableau Desktop, Tableau Server</i></p> <p>Then click on “Use Show Me to Start a View”: https://help.tableau.com/current/pro/desktop/en-us/buildauto_showme.htm</p> <p>Use Show Me to Start a View [...]</p> <p>Step 8: Share your findings</p> <p>You've done a bunch of work—great work—to learn that Burlington, North Carolina needs some fine tuning. Let's share this information with your teammates.</p> <p>Before you continue, select an option below:</p> <p>If you or your company does not use Tableau Server, or if you want to learn about a free, alternative sharing option, jump to Use Tableau Public.</p> <p>If you or your company uses Tableau Server, and you are familiar with what permissions are assigned to you, jump to Use Tableau Server.</p> <p>Share web content: https://help.tableau.com/current/pro/desktop/en-us/shareworkbooks.htm</p> <p><u>Share Web Content</u></p> <p><i>Applies to: Tableau Cloud, Tableau Server</i></p> <p>Share projects, collections, workbooks, views, metrics, data sources, and flows either directly with other users or by copying a link to the content. For views and metrics, you can also copy code to embed them in a webpage. (The legacy Metrics feature was retired in February 2024 for Tableau Cloud and will be retired in Tableau Server version 2024.2. For more information, see Create and Troubleshoot Metrics (Retired).)</p>
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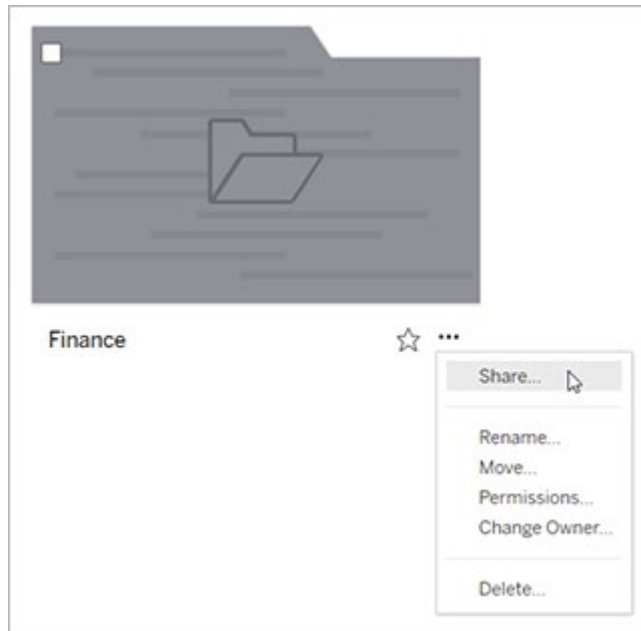
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Share directly with other users

When you share content directly with other users on your site, they receive a notification with a link to that content. The content is also added to their Shared with Me page, so they can easily find it later. Notifications can come by email, in Tableau’s in-app notifications center, or in the Tableau for Slack app if the site is connected to a Slack workspace. For more information, see [Manage Your Account Settings](#) and [Receive Notifications, Search, and Share Using the Tableau App for Slack](#).

1. Open the Actions (...) menu for the content you want to share.
2. Select **Share** from the menu.



3. Under **Share with people**, enter at least one user name. When you type, names that match your text appear.

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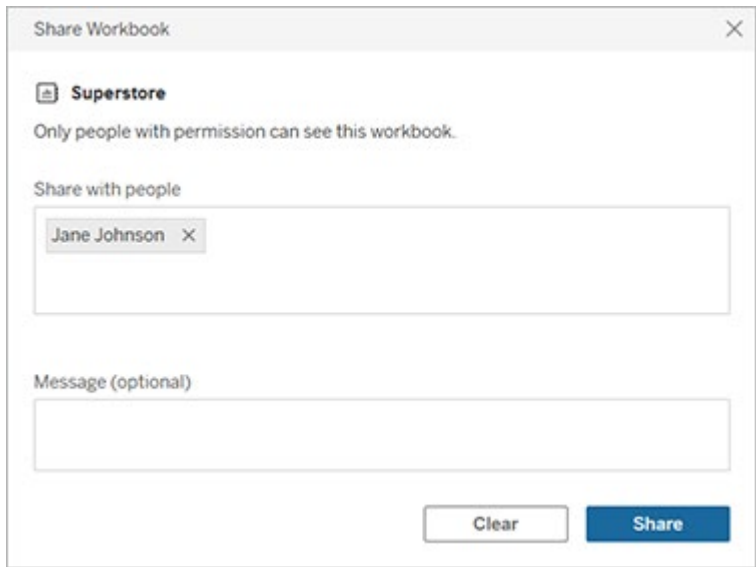
	<div data-bbox="651 310 1403 873"></div> <div data-bbox="592 905 1382 1003"><ol style="list-style-type: none">4. Under Message, enter an optional note to your recipients.5. Click the Share button.</div> <div data-bbox="553 1037 945 1071"><p><u>Grant access to shared content</u></p></div> <div data-bbox="553 1102 1427 1171"><p>To access the content you share with them, users must have permission to view that content on Tableau Server or Tableau Cloud.</p></div> <div data-bbox="553 1203 1430 1409"><p>If you control permissions for the content, you can grant access when you share it. If any of the users you shared with don't have the ability to view the content, the option to grant access will appear automatically after you share. You can only grant the capabilities for the view template via the grant access dialog. To grant users other permission capabilities, follow the instructions on Set permissions.</p></div> <div data-bbox="553 1440 1430 1575"><p>If you don't have the ability to set permissions for the content, the users you share with will be able to request access upon opening the link to the shared content. Their request for access is sent to the user who controls permissions for the content.</p></div>
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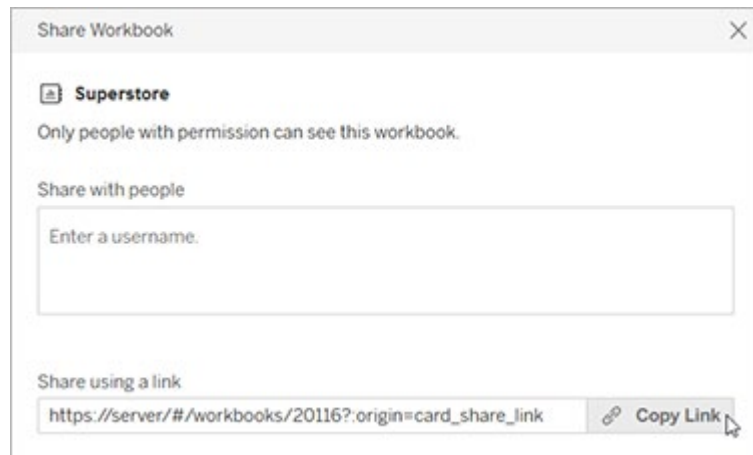
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Copy a link to share

Copy the link generated for a piece of content to share without sending an email to specific users.

1. Open the Actions (...) menu for the content you want to share.
2. Select **Share** from the menu.
3. Click the **Copy Link** button, then paste the link into an application to share it with others.



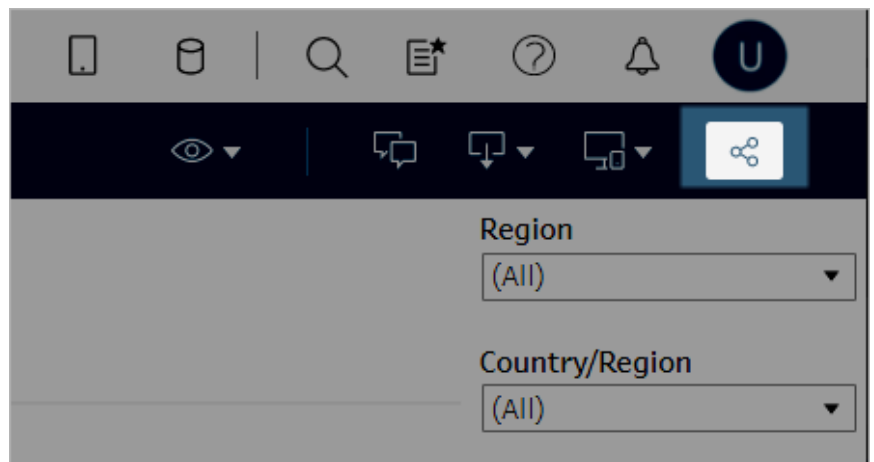
Tip: If you don't see the **Sharing using a link** option, clear any names from under **Share with people**.

Share and embed views and metrics

In addition to the sharing options listed above, views have unique options available when you click the Share button on the toolbar for a view. You can share a view that you have modified, and you can get the embed code for a view.

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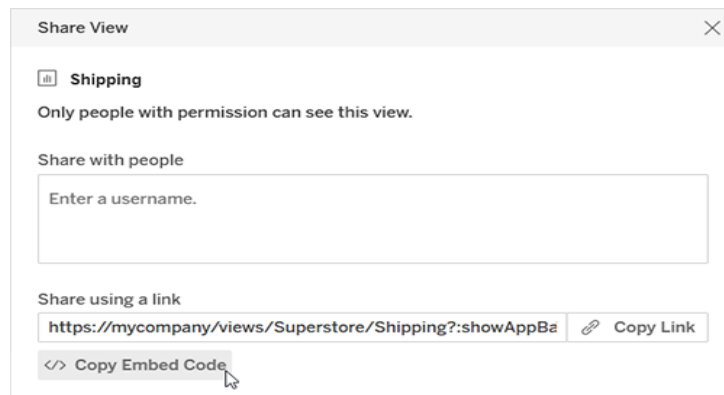
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You can also embed metrics by copying the embed code from the share dialog.

Embed views and metrics

1. Click **Share** in the toolbar for the view you want to embed or on the metric you want to embed.
2. Click **Copy Embed Code**, then paste the embed code into the source code for the webpage where you want to embed the view.



For more information, see [Embed Views into Webpages](#) or [Embed Metrics into Webpages \(Retired\)](#).

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Share modified or custom views

If you modify a view, by selecting marks or filters, Tableau captures these modifications by generating a unique link when you click the Share button. This unique link replaces the link to the original view for all sharing and embedding options. That way, the people you share with will see exactly what you were seeing when you shared.

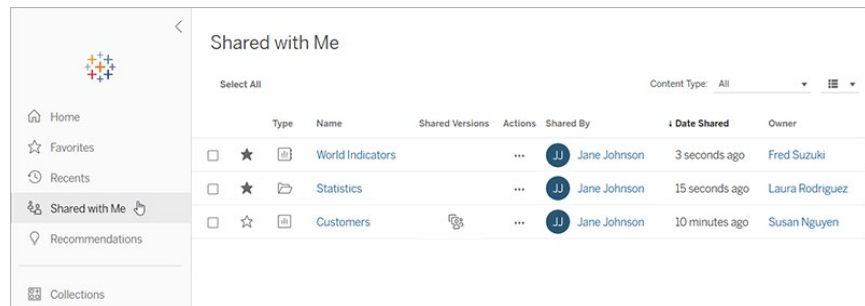
The link generated for a modified view expires two years after it was last accessed, or two years after it was created if never accessed.

To share a custom view that you have saved, simply open the custom view and use any sharing option.

Find content shared with you

You receive a notification message when someone shares content with you directly, either as an email, on your Tableau site by selecting the bell icon in the upper right corner, or in a connected Slack workspace with the Tableau for Slack app.

The Shared with Me page, accessed from the navigation pane, stores items that have been shared with you. The most recently shared items also appear in the Shared with Me channel on the Home page. Each item shows who it was shared by, the date it was shared, and any message added by the sharer.

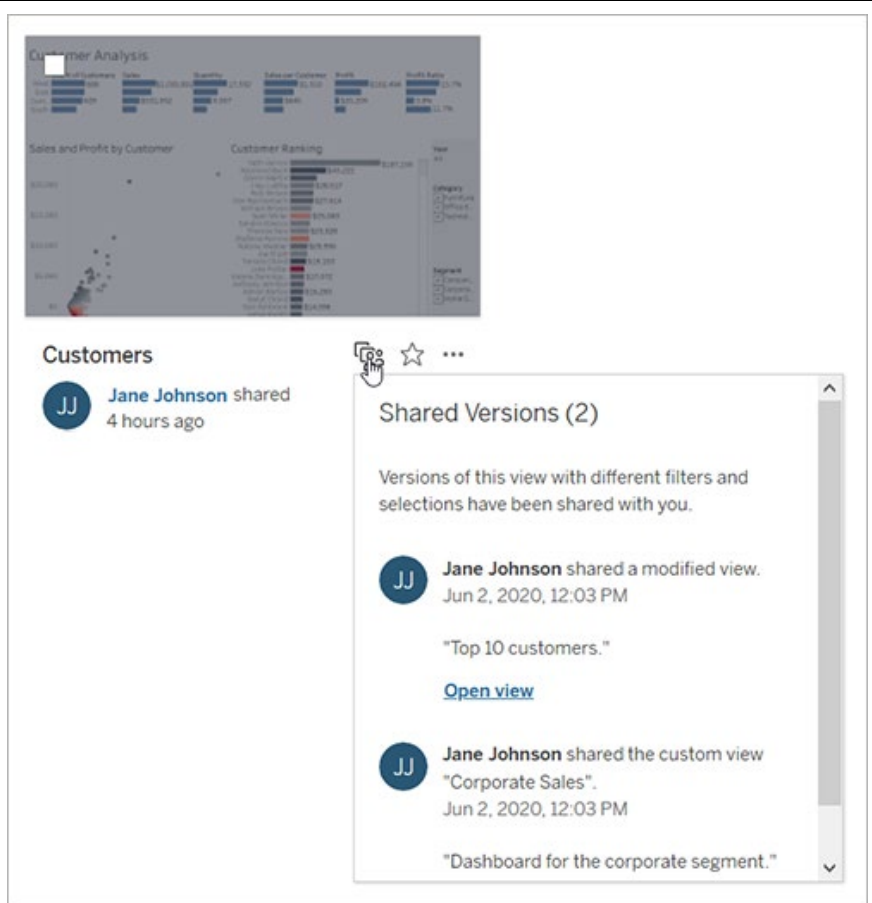


Type	Name	Shared Versions	Actions	Shared By	Date Shared	Owner
☐ ★	World Indicators	...	...	Jane Johnson	3 seconds ago	Fred Suzuki
☐ ★	Statistics	...	...	Jane Johnson	15 seconds ago	Laura Rodriguez
☐ ☆	Customers	...	...	Jane Johnson	10 minutes ago	Susan Nguyen

If an item has been shared with you multiple times, the information shown is for the most recent share. Views include additional information if multiple versions of the view have been shared with you. Custom views, modified views, and the original view all appear with unique details and links under **Shared Versions**.

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Share and collaborate in the cloud



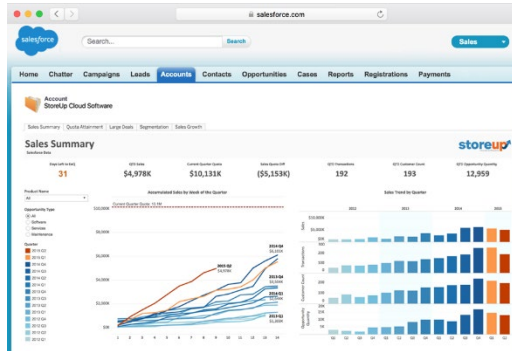
Tableau Online is your analytics platform fully hosted in the cloud. **Publish dashboards and share your discoveries with anyone. Invite colleagues or customers** to explore hidden opportunities **with interactive visualizations and accurate data.** All easily accessible from a browser or on the go with our mobile apps.

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[...]

Access anywhere, *embed* everywhere



Give external teams, partners, and clients simple and secure access to analytics, no virtual private networks required. Easily embed interactive dashboards on the web and within apps like Salesforce in just a few clicks.

[...]

Empowering organizations with data

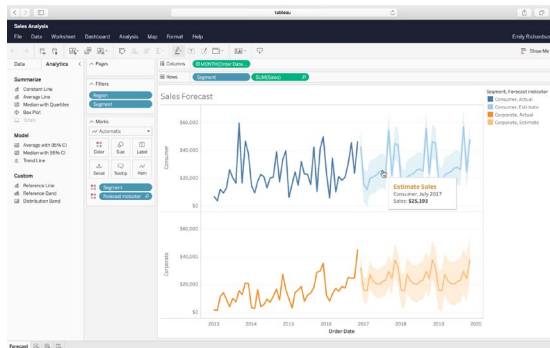


Tableau Online enables everyone in an organization to see and understand data, with offerings for every user type. Starting with casual users looking to make data driven decisions from a published dashboard, data enthusiasts who want to use web authoring to ask new questions from published data source, to data geeks who want to create and **share their vizzes and data sources with the rest of the organization.**

<https://www.tableau.com/products/cloud-bi>

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Let everyone in on it



Ditch the static slides for **live stories that others can explore**. Create a compelling narrative that empowers everyone you work with to ask their own questions, analyzing interactive visualizations with fresh data. Be part of a culture of **data collaboration**, extending the impact of your insights.

[...]

Sharing and collaborating securely

Communicate with data in a whole new way. **Share visualizations and underlying data securely** using Tableau Server or Tableau Online. Create an environment where **everyone in your organization can share and collaborate on trusted data**.

<https://www.tableau.com/products/desktop>

Tableau Online is your analytics platform fully hosted in the cloud.

[...]

Data management

Centralize access to your data in the cloud. **Publish data models** and make it easy for everyone to work from a curated, single source of truth.

[...]

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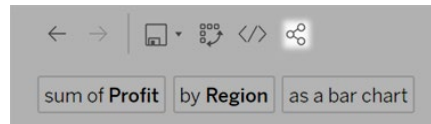
Share in seconds

Share a dashboard with a **few clicks** to start a conversation around data with your team. **Comment and interact live on the web** and on mobile devices.

<https://www.tableau.com/trial/tableau-online>

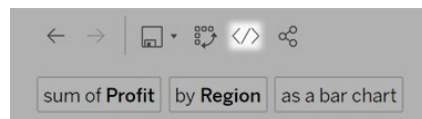
Share links to Ask Data vizzes

You can quickly **share Ask Data vizzes** without even saving a sheet. Simply click the link icon above the query box, and copy a link viewable by anyone with access to the data source.



Embed Ask Data in a web page

After you ask a question with Ask Data, an Embed Code icon appears in the toolbar. Click it to copy code you can **incorporate into any web page**.



https://help.tableau.com/current/pro/desktop/en-us/ask_data.htm

Tableau Help > Tutorial: Get Started with Tableau Desktop > Step 8:
Share your findings with others [...]

3. From the menu, select Share.

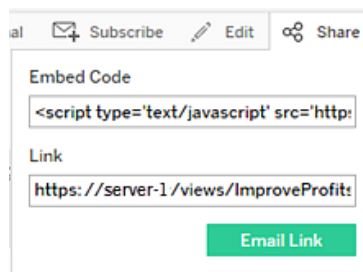


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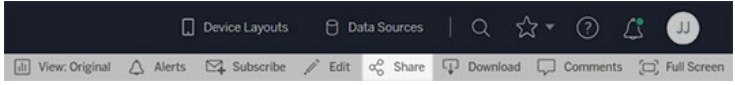
	<p>4. How do you want to share your story?</p> <ol style="list-style-type: none">Embed on your website: Copy the Embed Code and paste it in your web page HTML.Send a link: Copy the Link and send to your colleagues.Send an email using your default email client: Click the email icon. <p>https://help.tableau.com/current/guides/get-started-tutorial/en-us/get-started-tutorial-share.htm</p> <p>Tableau Help > Tableau Desktop and Web Authoring Help > ... > Embed Views and Dashboards > Embed Views into Webpages [...]</p> <p>You can embed interactive Tableau views and dashboards into web pages, blogs, wiki pages, web applications, and intranet portals. Embedded views update as the underlying data changes, or as their workbooks are updated on Tableau Server or Tableau Online. [...]</p> <p>You can do the following to embed views and adjust their default appearance:</p> <ul style="list-style-type: none">Get the embed code provided with a view: The Share button at the top of each view opens a dialog from which you can copy the embed code and paste into your webpage. (The Share button doesn't appear in embedded views if you change the showShareOptions parameter to false in the code.)  <p>The screenshot shows the top toolbar of a Tableau view. The 'Share' button, represented by a document icon with a plus sign, is highlighted. Other buttons visible include 'View: Original', 'Alerts', 'Subscribe', 'Edit', 'Download', 'Comments', and 'Full Screen'.</p> <ul style="list-style-type: none">Customize the embed code: You can customize the embed code using parameters that control the toolbar, tabs, and more. For more information, see Parameters for Embed Code.Use the Tableau JavaScript API: Web developers can use Tableau JavaScript objects in web applications. To get access to the API, documentation, code examples, and the Tableau developer community, see the Tableau Developer Portal.
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	<p>https://help.tableau.com/current/pro/desktop/en-us/embed.htm</p> <p>Tableau Help > Tableau Desktop and Web Authoring Help > ... > Build Data Views from Scratch > Add Interactivity using Actions</p> <p>Actions [...]</p> <p>Add context and interactivity to your data using actions. Users interact with your visualizations by selecting marks, or hovering, or clicking a menu, and the actions you set up can respond with navigation and changes in the view.</p> <p>For example, in a dashboard showing home sales by neighborhood, you could use actions to display relevant information for a selected neighborhood. Selecting a neighborhood in one view can trigger an action that highlights the related houses in a map view, filters a list of the houses sold, then opens an external web page showing census data for the neighborhood. [...]</p> <p>Here's how you use the different types of actions:</p> <ul style="list-style-type: none">• Filter. Use the data from one view to filter data in another to help guide analysis.• Highlight. Call attention to marks of interest by coloring specific marks and dimming all others.• Go to URL. Create hyperlinks to external resources, such as a web page, file, or another Tableau worksheet.• Go to Sheet. Simplify navigation to other worksheets, dashboards, or stories.• Change Parameter. Let users change parameter values by directly interacting with marks on a viz.• Change Set Values. Let users change the values in a set by directly interacting with marks on a viz. <p>https://help.tableau.com/current/pro/desktop/en-us/actions.htm</p>
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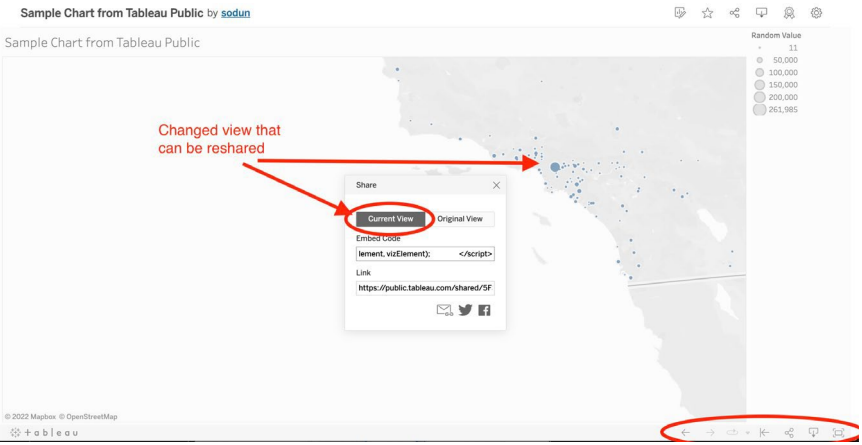
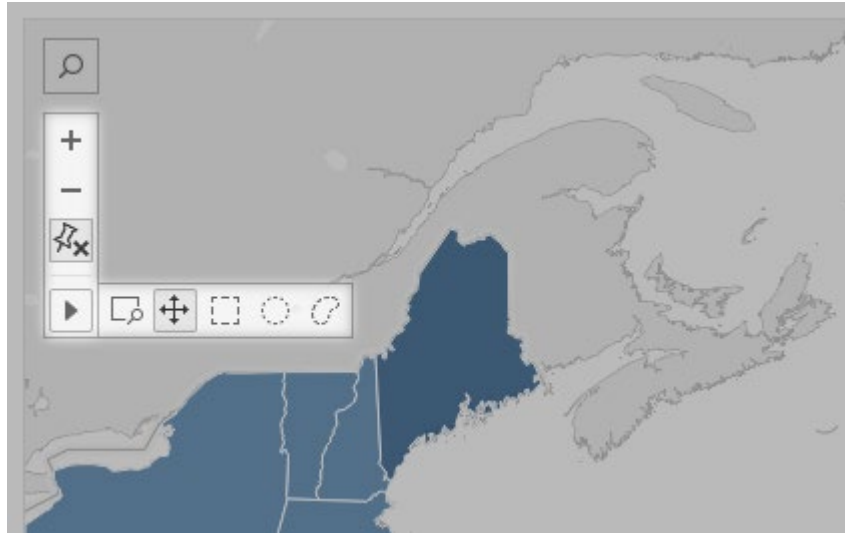
	<p>Tableau Public: https://public.tableau.com/app/discover</p> <p><u>Welcome to Tableau Public</u></p> <p>A free platform to explore, create, and publicly share data visualizations online.</p>
<p>11. The method of claim 10, wherein the one or more interactive features include at least one of a zoom feature, a data mouse-over pop-up window, a data hide feature, a data share feature, an audio feature, a video feature, an animation feature, and a drill-down feature, or a data gliding feature.</p>	<p><i>The interactive features of claim 10 include at least one of a zoom feature, a data mouse-over pop-up window, a data hide feature, a data share feature, an audio feature, a video feature, an animation feature, and a drill-down feature, or a data gliding feature.</i></p> <p><i>See also claim 10 for examples of interactive features of the interactive chart.</i></p> <p>By selecting a zoom function (as shown above), the published interactive chart can be modified without using the user interface on the first website, as shown below.</p>  <p><i>See also:</i></p> <p>https://help.tableau.com/current/pro/desktop/en-us/inspectdata_pan_zoom.htm</p> <p><u>Zoom and Pan Views, and Select Marks</u></p> <p><i>Applies to: Tableau Cloud, Tableau Desktop, Tableau Server</i></p>

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In the upper-left corner of a view, the view toolbar lets you zoom in and out, pan the view, and select data marks.



https://help.tableau.com/current/pro/desktop/en-us/viz_in_tooltip.htm

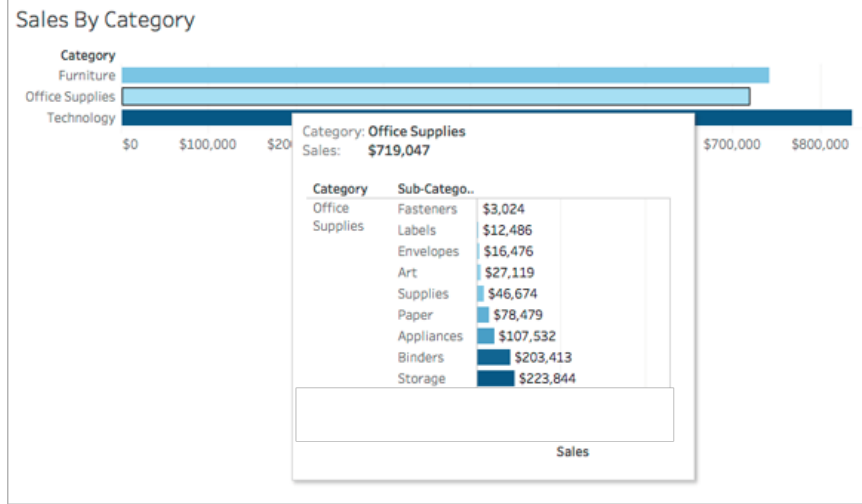
Create Views in Tooltips (Viz in Tooltip)

Applies to: Tableau Cloud, Tableau Desktop

As you craft views and look for ways to reveal more details about data to your audience, you can embed visualizations within tooltips—also known as "Viz in Tooltip."

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<https://www.tableau.com/drive/hiding-aspects-of-views#:~:text=Hiding%20Marks%20is%20done%20with,want%20to%20show%20one%20measure!>

Tableau offers the ability for a user to 'hide' fields, headers, and other aspects of analysis in order to appropriately display the visual, but preserve the structure of the query by circumventing the use of filters.

https://help.tableau.com/current/pro/desktop/en-us/actions_url.htm

URL Actions

Applies to: Tableau Cloud, Tableau Desktop, Tableau Server

A URL action is a hyperlink that points to a web page, file, or other web-based resource outside of Tableau. You can use URL actions to create an email or link to additional information about your data. To customize links based on your data, you can automatically enter field values as parameters in URLs.

<https://help.tableau.com/current/guides/get-started-tutorial/en-us/get-started-tutorial-drilldown.htm>

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	<p>CONTENTS</p> <p>Overview</p> <p>Step 1: Connect to your data</p> <p>Step 2: Drag and drop to take a first look</p> <p>Step 3: Focus your results</p> <p>Step 4: Explore your data geographically</p> <p>Step 5: Drill down into the details</p> <p>Step 6: Build a dashboard to show your insights</p> <p>Step 7: Build a story to present</p> <p>Step 8: Share your findings with others</p> <p>Learning Library</p>
<p>12. The method of claim 1, wherein the interactive chart is stored in memory and is selectable by a subsequent user.</p>	<p><i>The interactive chart of claim 1 is stored in memory and is selectable by a subsequent user.</i></p> <p><i>The interactive chart generated by a first user is then stored in the memory of the server (i.e. the Tableau server's memory or Tableau's customers' servers memory), which then can be accessed by a subsequent user because the interactive chart has been shared with the subsequent user.</i></p> <p><i>See claim 1(pre)-1(d), for elements of claim 1; see particularly 1(c) and 1(d) for the interactive chart being stored in the memory and is selectable by a subsequent user.</i></p>