Follow-along guide: Present like a pro with Tableau

This document includes detailed instructions for how to perform the data visualizations described in the video “Present like a pro with Tableau”.

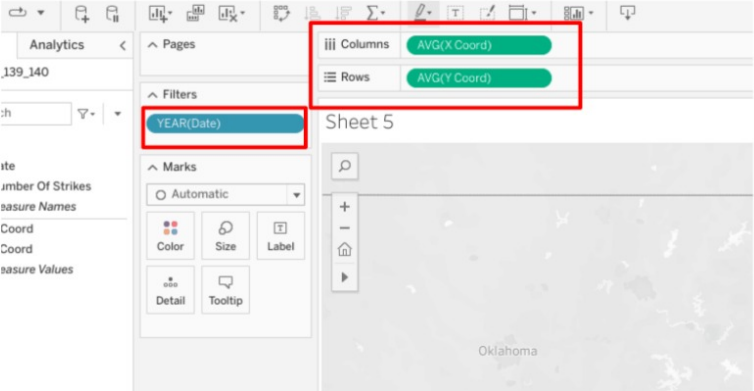
The following guide points out areas of the video that may require adjustment. These resource guides can also serve as a set of usability reminders for you to recall when using Tableau in your future career.

Instructions

- Go to https://public.tableau.com/s/
- Since you’ve already [set up your Tableau Public profile](), all you need to do is log in and select **Web Authoring** under **Create** in the navigation bar.
- Select the appropriate CSV file provided in the [instructions](). Use the same data source as the previous video. The dataset you’ll use with this instructional video is: tableau_main_2009_to_2018.csv
    - Please be aware that when you download the zip file folder provided, the computer automatically names that zip file folder with a long string of numbers and letters. You have to open that folder and then upload the individual files that are named correctly and match what's shown in the video
- Click on NEW WORKSHEET.

Note: Please allow several minutes for data import into a new worksheet.

- Drag X coord to Column field. Drag Y coord to Row field.
- Drag DATE to FILTERS.



Columns AVG(X Coord)
Rows AVG(Y Coord)
Filters YEAR(Date)

Analytics
139_140
Pages
Marks
Automatic
Color
Size
Label
Detail
Tooltip
ate
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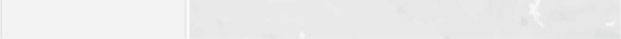
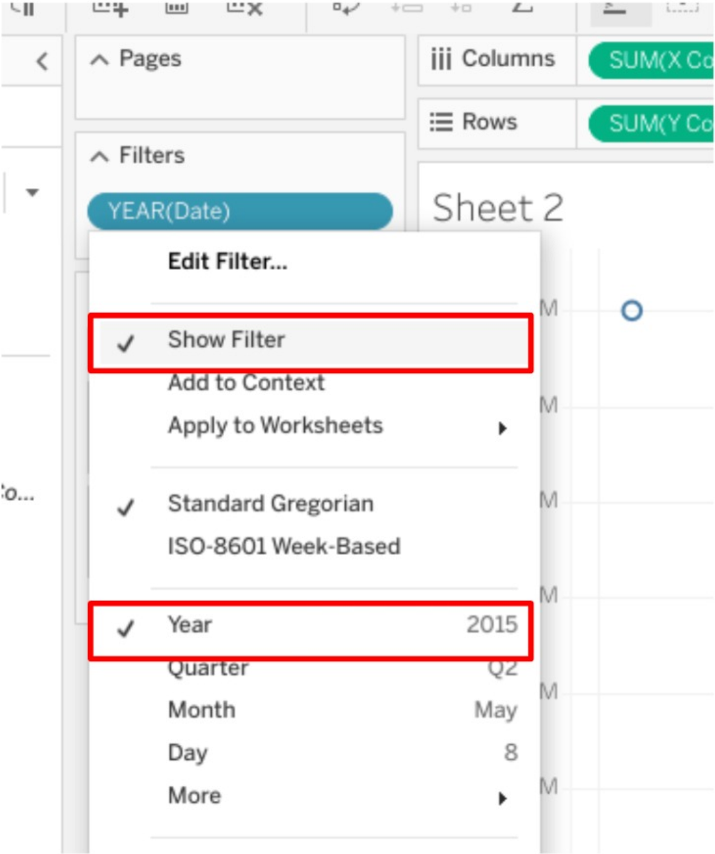
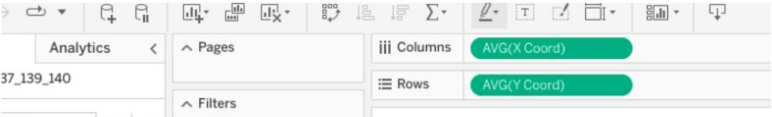
easure Names
Coord
Coord
easure Values
Sheet 5
Oklahoma

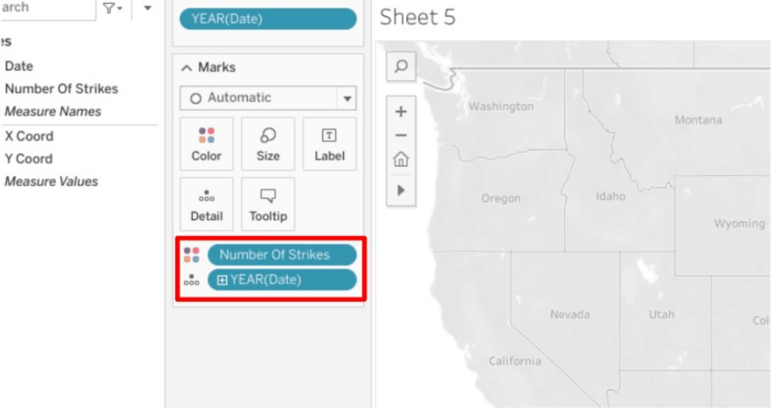


- Click on DATE dropdown, Select YEAR.
- Click on DATE dropdown, select SHOW FILTER.

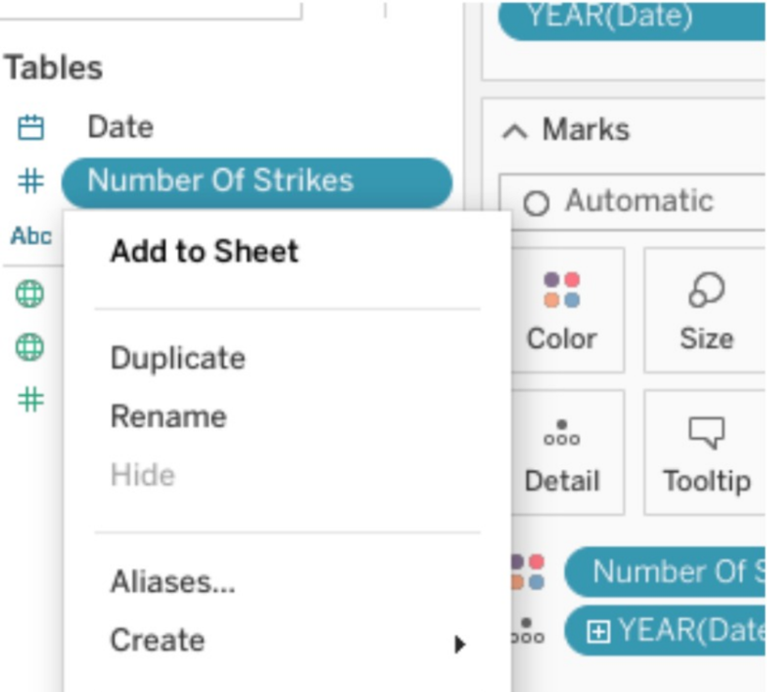

Pages
Columns
SUM(X Co
Rows
SUM(Y Co
Filters
YEAR(Date)
Sheet 2
Edit Filter...
✓ Show Filter
Add to Context
Apply to Worksheets
✓ Standard Gregorian
ISO-8601 Week-Based
✓ Year 2015
Quarter Q2
Month May
Day 8
More

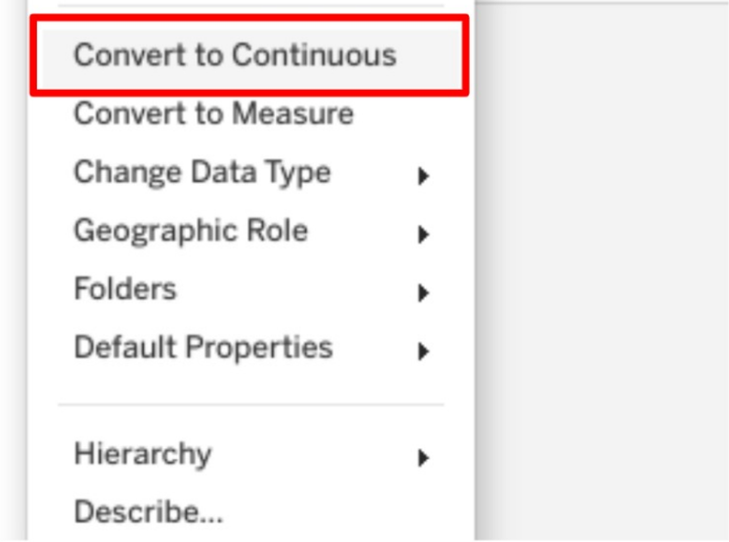
- Drag NUMBER of STRIKES into both the COLOR square and DETAIL square inside the MARKS box.


Analytics
37_139_140
Pages
Filters
Columns
AVG(X Coord)
Rows
AVG(Y Coord)

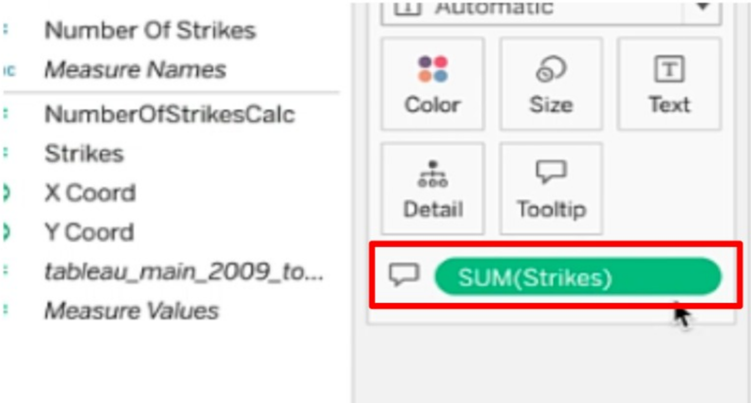

arch
es
Date
Number Of Strikes
Measure Names
X Coord
Y Coord
Measure Values
YEAR(Date)
Marks
Automatic
Color
Size
Label
Detail
Tooltip
Number Of Strikes
YEAR(Date)
Sheet 5
Washington
Montana
Oregon
Idaho
Wyoming
Nevada
Utah
Col
California

- Click on dropdown of NUMBER OF STRIKES, select CONVERT to CONTINUOUS.

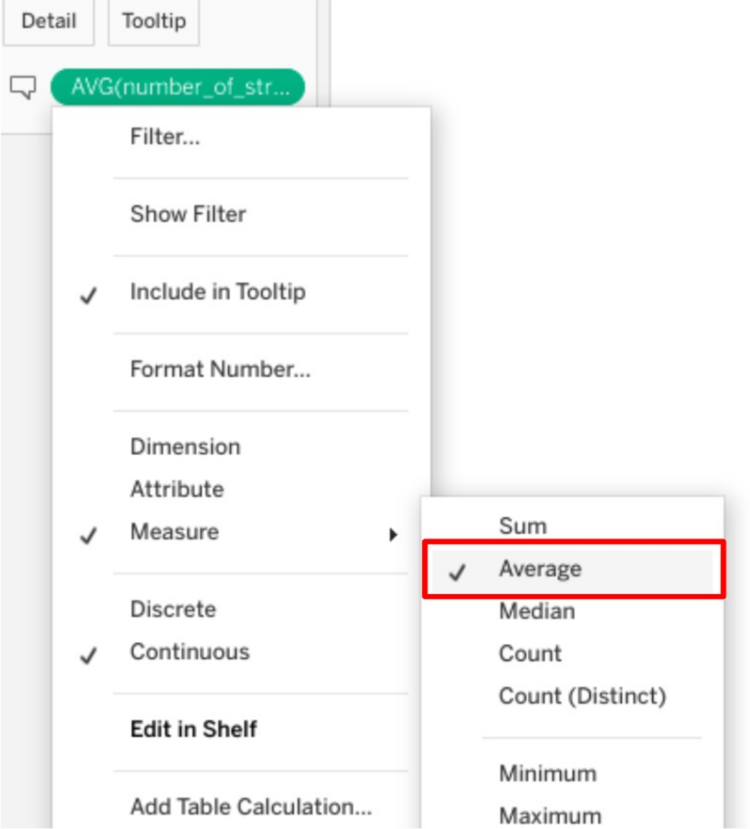

Tables
Date
Number Of Strikes
Abc
Add to Sheet
Duplicate
Rename
Hide
Aliases...
Create
YEAR(Date)
Marks
Automatic
Color
Size
Detail
Tooltip
Number Of S
YEAR(Date


Convert to Continuous
Convert to Measure
Change Data Type
Geographic Role
Folders
Default Properties
Hierarchy
Describe...

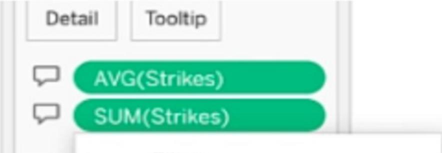
- Click on NEW WORKSHEET.
- Click dropdown of NUMBER of STRIKES field.
- Select CREATE and CALCULATED FIELD.
- TYPE “Strikes” for the title.
- Click OK.
- Drag calculation into TOOLTIP field.

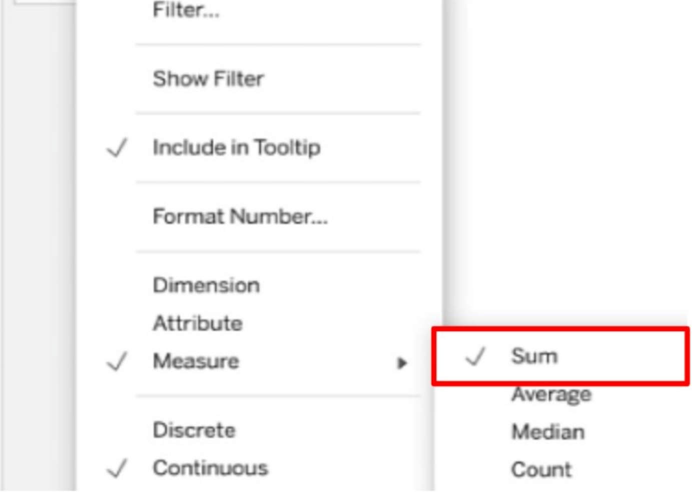

Number Of Strikes
Measure Names
NumberOfStrikesCalc
Strikes
X Coord
Y Coord
tableau_main_2009_to...
Measure Values
Automatic
Color
Size
Text
Detail
Tooltip
SUM(Strikes)

- In the Strikes drop down, Select MEASURE, then AVERAGE.

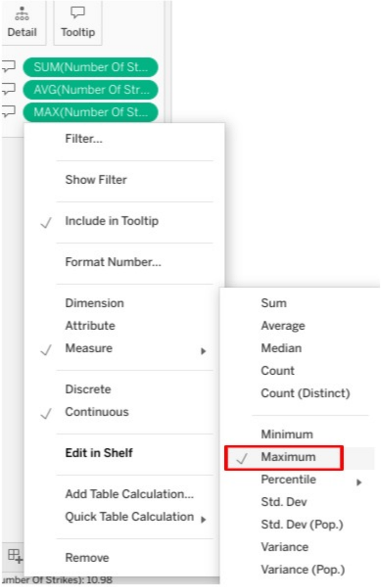

Detail
Tooltip
AVG(number_of_str...
Filter...
Show Filter
✓ Include in Tooltip
Format Number...
Dimension
Attribute
✓ Measure
Discrete
✓ Continuous
Edit in Shelf
Add Table Calculation...
Sum
✓ Average
Median
Count
Count (Distinct)
Minimum
Maximum

- Drag calculation field to TOOLTIP again. Select MEASURE, then SUM.

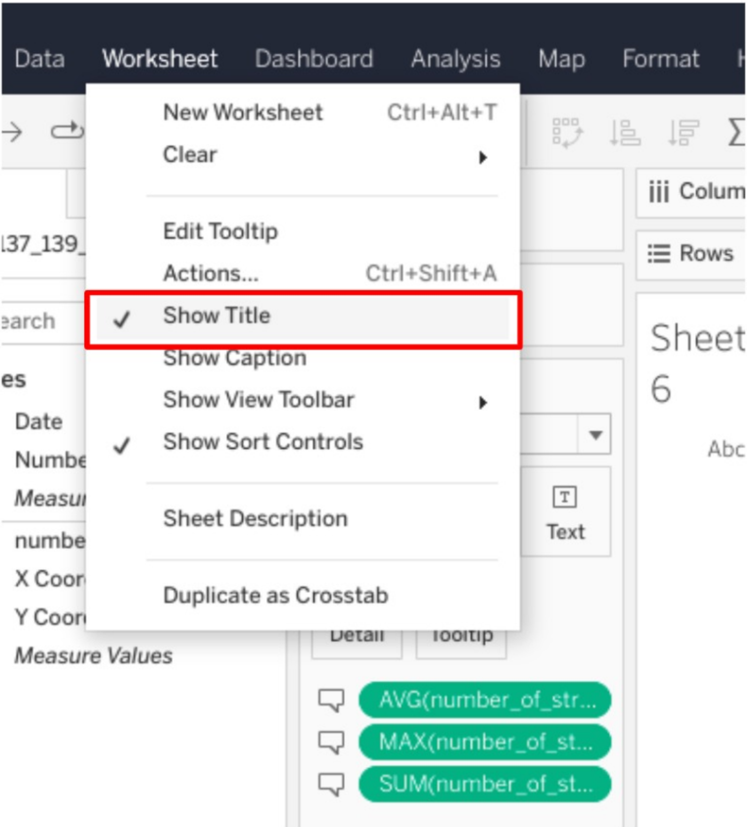

Detail
Tooltip
AVG(Strikes)
SUM(Strikes)


Filter...
Show Filter
✓ Include in Tooltip
Format Number...
Dimension
Attribute
✓ Measure
Discrete
✓ Continuous
✓ Sum
Average
Median
Count

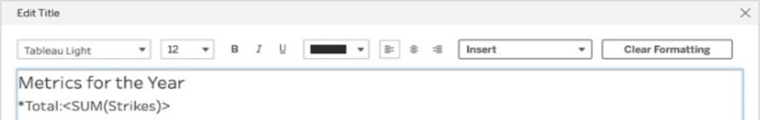
- Drag calculation to TOOLTIP, select MEASURE, then MAXIMUM.


Detail
Tooltip
SUM(Number Of St...
AVG(Number Of Str...
MAX(Number Of St...
Filter...
Show Filter
✓ Include in Tooltip
Format Number...
Dimension
Attribute
✓ Measure
Discrete
✓ Continuous
Edit in Shelf
Add Table Calculation...
Quick Table Calculation
Remove
Sum
Average
Median
Count
Count (Distinct)
Minimum
✓ Maximum
Percentile
Std. Dev
Std. Dev (Pop.)
Variance
Variance (Pop.)
umber Of Strikes): 10.98

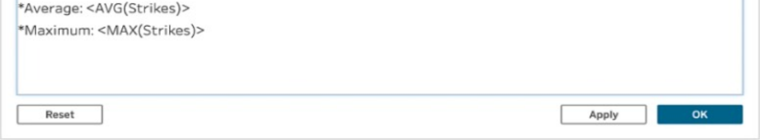
- Click on WORKSHEET and select SHOW TITLE.


Data
Worksheet
Dashboard
Analysis
Map
Format
New Worksheet Ctrl+Alt+T
Clear
Edit Tooltip
Actions... Ctrl+Shift+A
✓ Show Title
Show Caption
Show View Toolbar
✓ Show Sort Controls
Sheet Description
Duplicate as Crosstab
Columns
Rows
Sheet 6
Abc
Text
Detail
Tooltip
AVG(number_of_str...
MAX(number_of_st...
SUM(number_of_st...
Date
Number
Measure
number
X Coor
Y Coor
Measure Values

- Type in ‘Metrics for the Year’ in title field.
- Then add the following beneath it:
    - *Total: <SUM(Strikes)>
    - * Average: <AVG(Strikes)>
    - * Maximum: <MAX(Strikes)>’.
    - Click OK.


Edit Title
Tableau Light
12
B
I
U
Insert
Clear Formatting

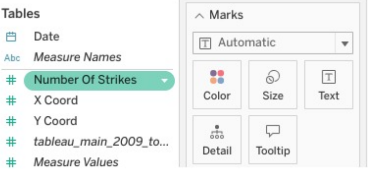
Metrics for the Year
*Total:<SUM(Strikes)>



*Average: <AVG(Strikes)>
*Maximum: <MAX(Strikes)>

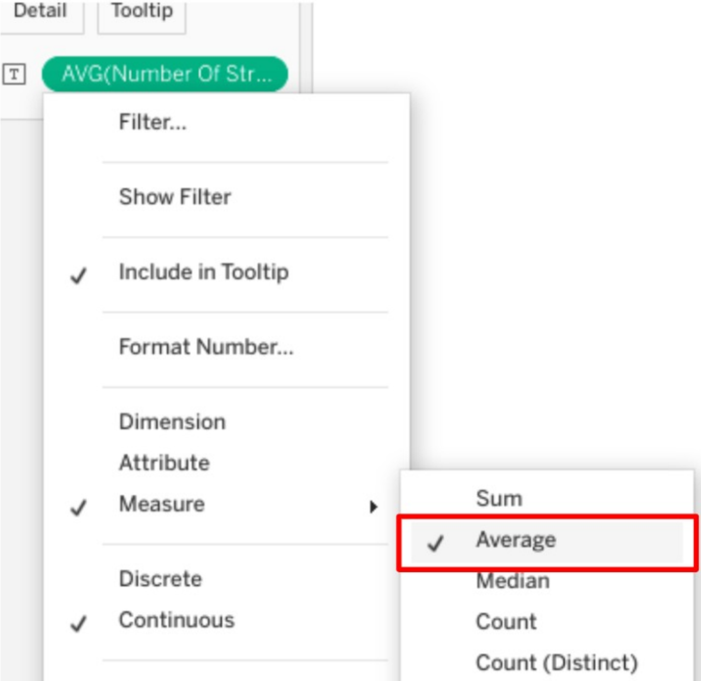
Reset
Apply
OK

- Click on NEW WORKSHEET.
- Drag NUMBER of STRIKES to the TEXT square in the MARKS field.

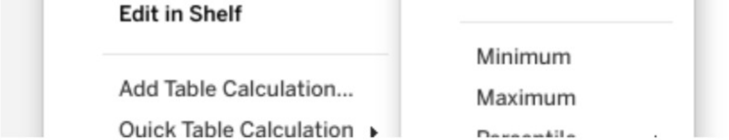


Tables
Date
Abc
Measure Names
Number Of Strikes
X Coord
Y Coord
tableau_main_2009_to...
Measure Values
Marks
Automatic
Color
Size
Text
Detail
Tooltip

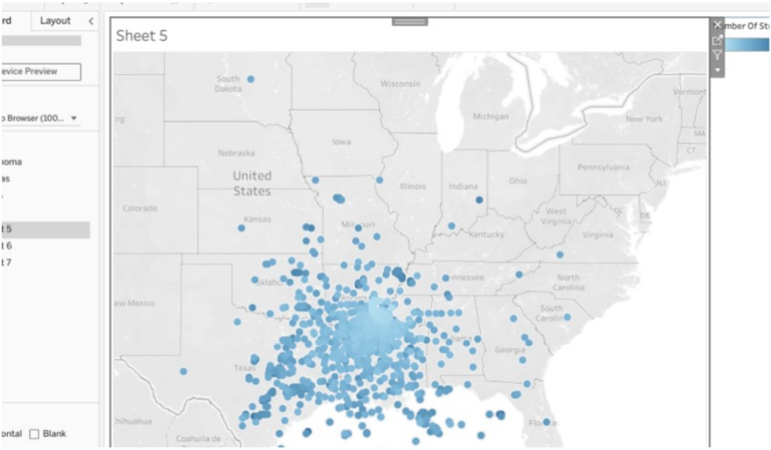
- From dropdown, select MEASURE and AVERAGE.



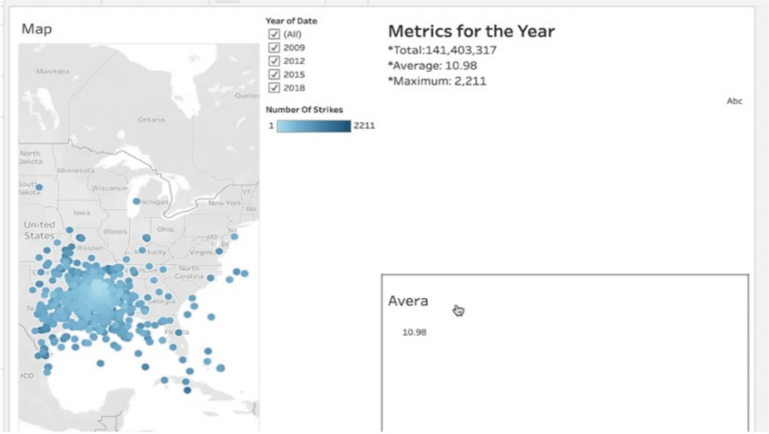
Detail
Tooltip
AVG(Number Of Str...
Filter...
Show Filter
Include in Tooltip
Format Number...
Dimension
Attribute
Measure
Discrete
Continuous
Sum
Average
Median
Count
Count (Distinct)


Edit in Shelf
Add Table Calculation...
Quick Table Calculation
Minimum
Maximum

- Click on NEW DASHBOARD.
- Drag USA map worksheet to empty dashboard.


Layout
Device Preview
Browser (100...
Sheet 5
t 5
t 6
t 7
Blank
mber Of St
South Dakota
Wisconsin
Michigan
New York
Vermont
Iowa
Nebraska
United States
Illinois
Indiana
Ohio
Pennsylvania
Colorado
Kansas
Missouri
Kentucky
West Virginia
Virginia
Tennessee
North Carolina
South Carolina
New Mexico
Georgia
Texas
Florida
Chihuahua
Coahuila de

- Drag your other two worksheets to the dashboard.


Map
Year of Date
☑ (All)
☑ 2009
☑ 2012
☑ 2015
☑ 2018
Number Of Strikes
1
2211
Abc
Avera
10.98
Manitoba
Ontario
Quebec
North Dakota
Minnesota
South Dakota
Wisconsin
Michigan
New York
Iowa
United States
Illinois
Ohio
Missouri
Kentucky
Virginia
North Carolina
Georgia
Florida

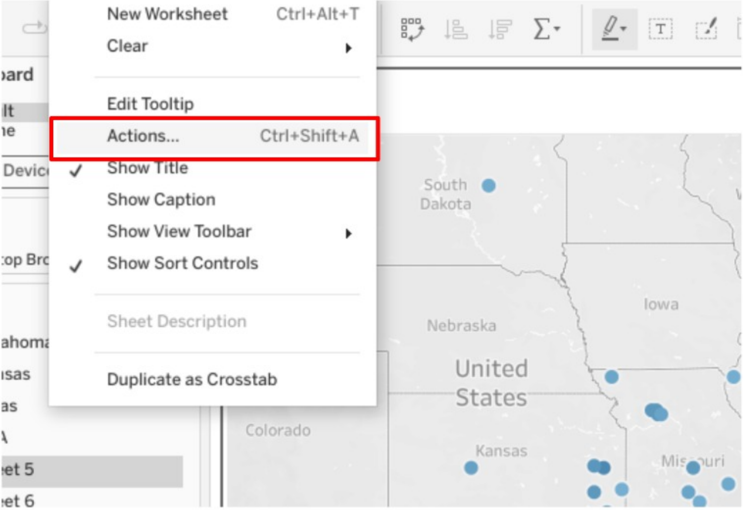
Metrics for the Year

*Total:141,403,317

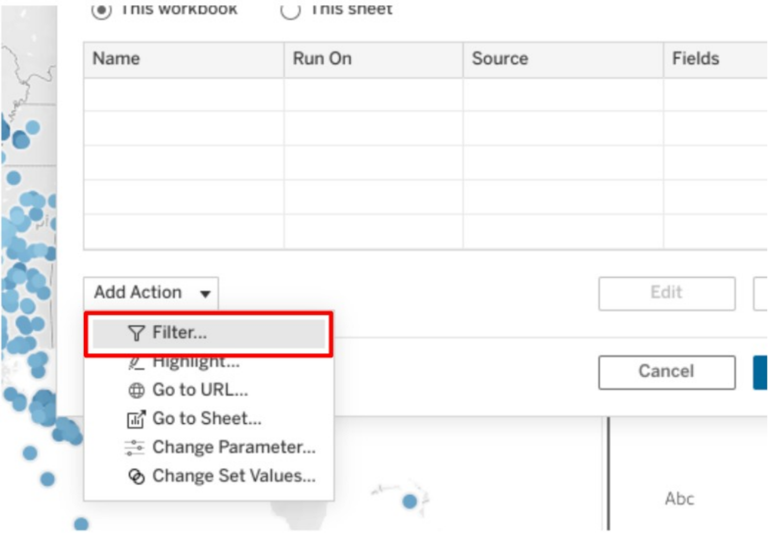
*Average: 10.98

*Maximum: 2,211

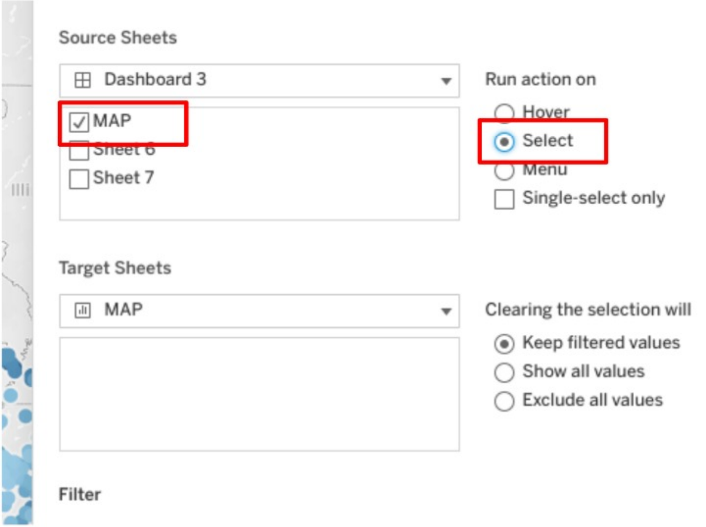
- Click map, then select WORKSHEET and ACTIONS.


New Worksheet Ctrl+Alt+T
Clear
Edit Tooltip
Actions... Ctrl+Shift+A
Show Title
Show Caption
Show View Toolbar
Show Sort Controls
Sheet Description
Duplicate as Crosstab
South Dakota
Nebraska
Iowa
United States
Colorado
Kansas
Missouri

- Select ADD ACTION and FILTER.


This workbook
This sheet
Name
Run On
Source
Fields
Add Action
Filter...
Highlight...
Go to URL...
Go to Sheet...
Change Parameter...
Change Set Values...
Edit
Cancel
Abc

- Under SOURCE SHEETS, select the dashboard you created from the dropdown.
- Check the box for the map worksheet, and then choose SELECT under the RUN ACTION ON list.



Source Sheets

Dashboard 3

☑ MAP
☐ Sheet 6
☐ Sheet 7

Run action on

○ Hover
● Select
○ Menu
☐ Single-select only

Target Sheets

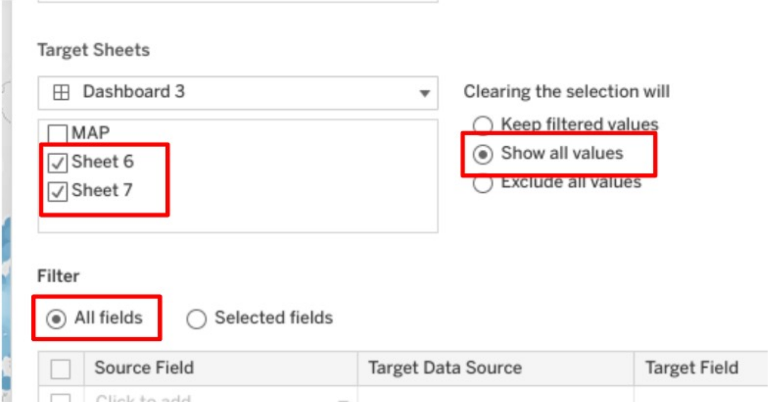
MAP

Clearing the selection will

● Keep filtered values
○ Show all values
○ Exclude all values

Filter

- Next, under the TARGET SHEETS list, select dashboard from the drop down, then check box for the other two worksheets you created: Map and Metrics.
- Select SHOW ALL VALUES.
- Select ALL FIELDS, under Filter.
- Click OK.



Target Sheets

Dashboard 3

☐ MAP
☑ Sheet 6
☑ Sheet 7

Clearing the selection will

○ Keep filtered values
● Show all values
○ Exclude all values

Filter

● All fields ○ Selected fields

☐	Source Field	Target Data Source	Target Field
☐	Click to add		

Click to add

- Type in ‘Interactive Filter’ in Legend title field.
- Type in ‘Location Metrics’ in title field.
- Now you’ve created an interactive geographic dashboard that adjusts metrics each time a year or location is changed or selected. Well done!

Go to next item ✓ **Completed**

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