

Lecture Notes – Session 16 – IS201 – Tableau

Brandt Redd – 2020-03-11

Pie Chart of Major

Use “Getting to Know You” data set from: <https://brandtredd.org/files/IS201/Getting-to-Know-You.csv>

First, do it in Excel

- Load “Getting to Know you.csv
- Create a pivot table showing major counts
- Create a pie chart from the pivot table

Now in Tableau

- Load up data set
- Fix data type for dates
- Change marks to pie
- Drag Major to color
- Drag number of records to angle
- Drag Major to label
- Ctrl-shift-B to make bigger
- Drag number of records to label

Bar Chart of Major

- Drag Major to columns
- Drag Number of records to rows
- Sort by number of records.

Bubble Chart

For this and the following examples, use the Kickstarter Campaigns Practice Data from MyEducator section 5.3.

<https://www.myeducator.com/course/materials.download/942as/2295226609258037249/>

- Country to Rows
- Pledged USD to Columns
- Change to Bubble Chart (Click “Show Me” in the upper-right)
- Change measure to average (click Pledged USD, select Measure, Select Average)

Continuous Line Graph

Trend in total sales on a monthly basis

- Kickstarter Campaigns
- Created At to Columns
- Pledged USD to Rows
- Change to line chart (“Show Me” button in upper-right)
- Right-Click “Created At” and change to Monthly (the lower entry for Monthly)

Filled Geographical Map

- Country to Columns
- Pledged USD to Rows
- Change to Filled Map (“Show Me”)
- Pledged to Label

Symbol Map

- Start with above (“Filled Geographical Map”)
- Change to Symbol Map
- Change symbol to circle
- Click on size to change size of the circles
- Use Drag tool to recenter map

Highlighted Table

- Create calculated field CountryState
 - Click “Data Source” in lower-left
 - Right-click Country
 - Create Calculated Field
 - Formula: [Country] + ", " + [State]
- Create calculated field Success
 - Right click Pledged
 - Create Calculated Field
 - [Pledged USD] / [Goal]
- CountryState to Rows
- Success to Columns
- Change Success to Average
- Change to Highlight Table (“Show Me”)
- Edit color, advanced, center on 1.
- Sort by Field – Avg Success

Vertical Bar Chart (Column Chart)

- Country to Column
- Category to Column
- Change to Bar Chart
- Success to Row
- Change Success to Average
- Category to Color
- Category to Column

Continuous Line Graph

- Created At to column
- Success to Rows
- Change Success to Average
- Change to Continuous Line
- Change Columns to Month
- Add Created At to color (changes to year)

Side-by-Side Vertical Bar Chart

- Sum of profit for sub-categories.
- Country to Columns
- Goal to Rows
- Pledged USD to Rows
- Change Goal and Pledged USD to Average
- Change to Side-By-Side Bar Chart (“Show Me”)

Continuous Line Graph with Forecast

- Deferred to Next Class