



Reading: Follow-along guide: Work with Tableau, Part 2

This document includes detailed instructions for how to perform the data visualizations described in the video “Work with Tableau, Part 2.”

The following guide points out areas of the video that may require adjustment. These reference 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 reading: **Download your datasets and begin presenting with Tableau**. The dataset you'll use with this instructional video is: tableau_dataset.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.

(**Note:** Please allow several minutes for dataset upload.)

Before you can start designing visualizations, you'll first need to upload your data. You'll need to upload the specific dataset files to Tableau. Do not upload the entire .zip folder. When you download the zip folder from this page, your computer will automatically download a .zip file folder. The .zip folder is automatically named with a series of letters and numbers. Open that .zip folder, then save the individual dataset files. The two files are: tableau_main_2009_to_2018.csv and tableau_dataset.csv. Once you can see the individual dataset files, proceed to upload your dataset for this video to Tableau Public.

Notice on the data source tab that you can see all of your column headers and Tableau icons that help you determine data types. In this case, you'll see a calendar icon, globe icons, and pound signs.

3. tableau_dataset

The screenshot shows the Tableau Data Source interface. At the top, there is a button labeled "tableau_dataset.csv". Below it is a small icon of two overlapping tables. A message says "Need more data?" followed by "Drag tables here to relate them. [Learn more](#)".

Below this, there is a detailed view of the dataset:

Name	Date	Longitude	Latitude	Number Of Strikes
tableau_dataset.csv	6/8/2018	-95.6000	20.0000	1
	6/8/2018	-95.2000	20.0000	1
	6/8/2018	-83.4000	20.0000	1
	6/8/2018	-78.7000	23.0000	1
	6/8/2018	-96.3000	21.0000	1
	6/8/2018	-85.9000	22.0000	1
	6/8/2018	-85.3000	23.0000	1
	6/8/2018	-82.3000	23.0000	1

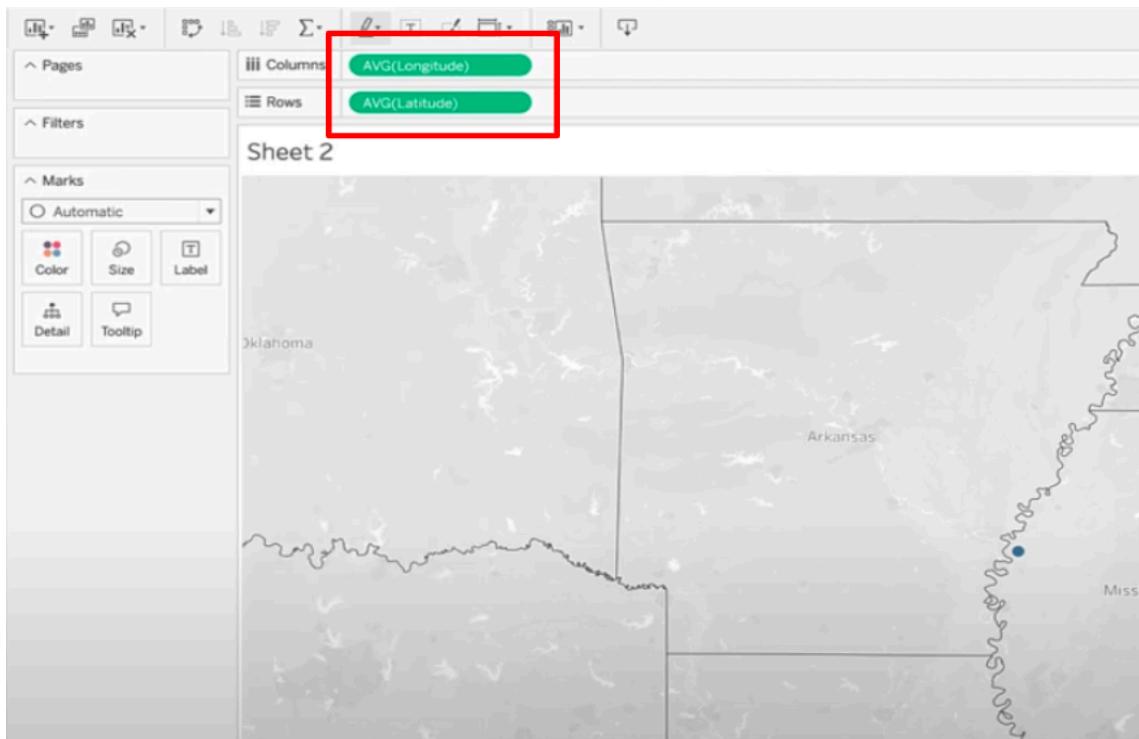
- Click on NEW WORKSHEET.

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

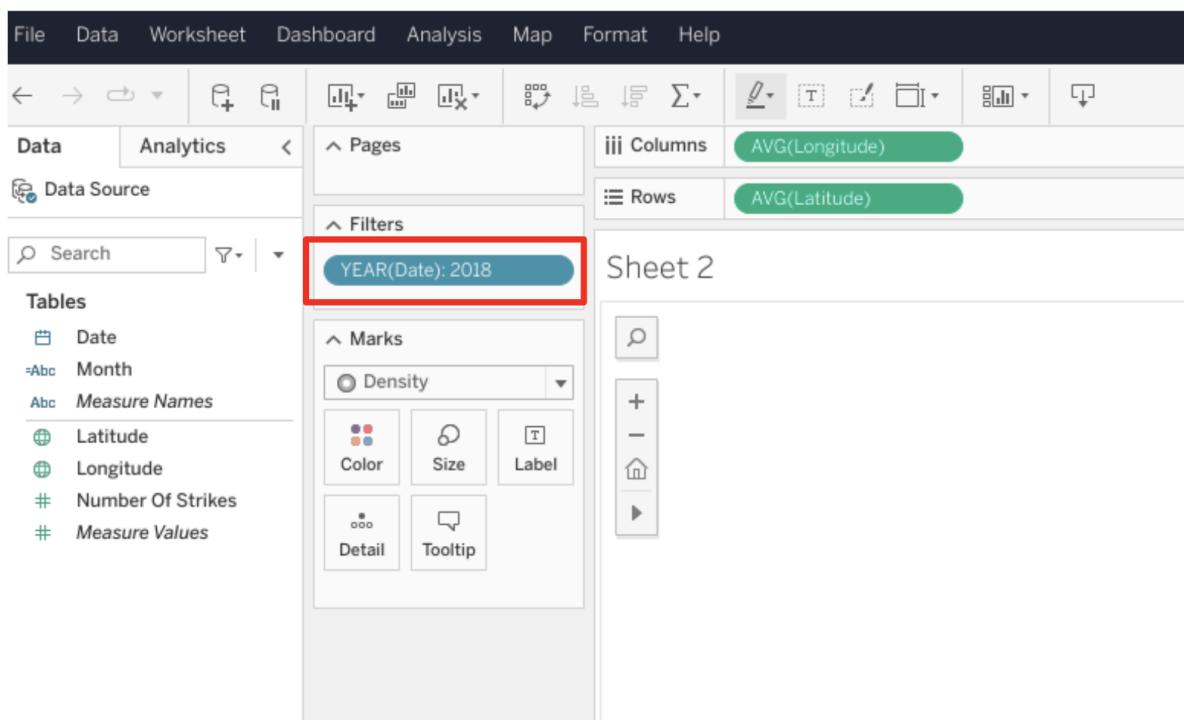
The screenshot shows the Tableau interface with a blank worksheet. The ribbon at the bottom has tabs for "Data Source" and "Sheet 1". The "Sheet 1" tab is highlighted with a red box around its plus sign icon, indicating where to click to add new data.

- Drag LONGITUDE into the column field. Drag LATITUDE into the rows field.

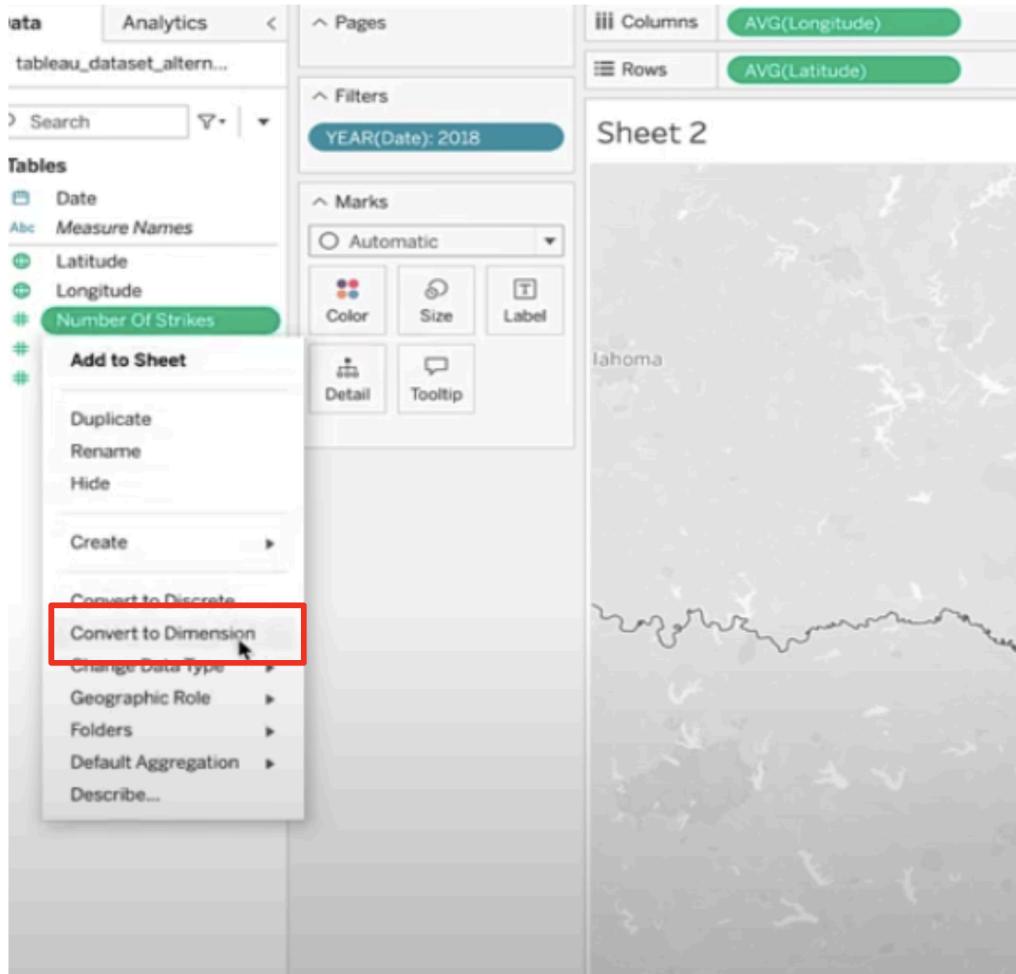
(Note: Make sure the latitude and longitude fields are set to continuous dimensions)



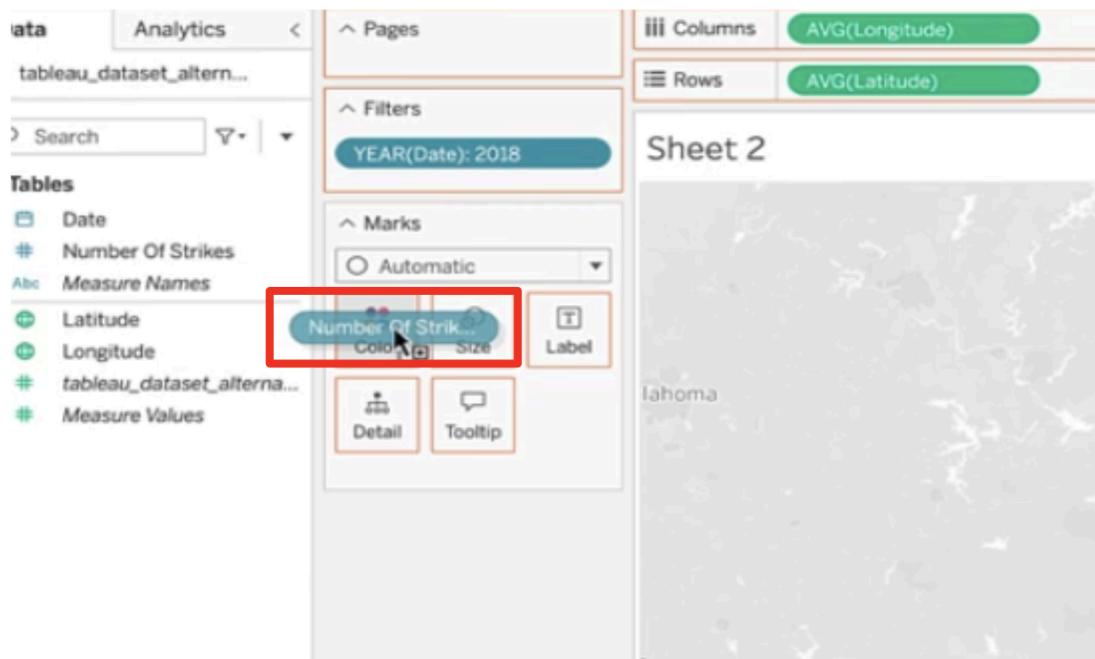
- Drag DATE into Filters field. Filter to only 2018.



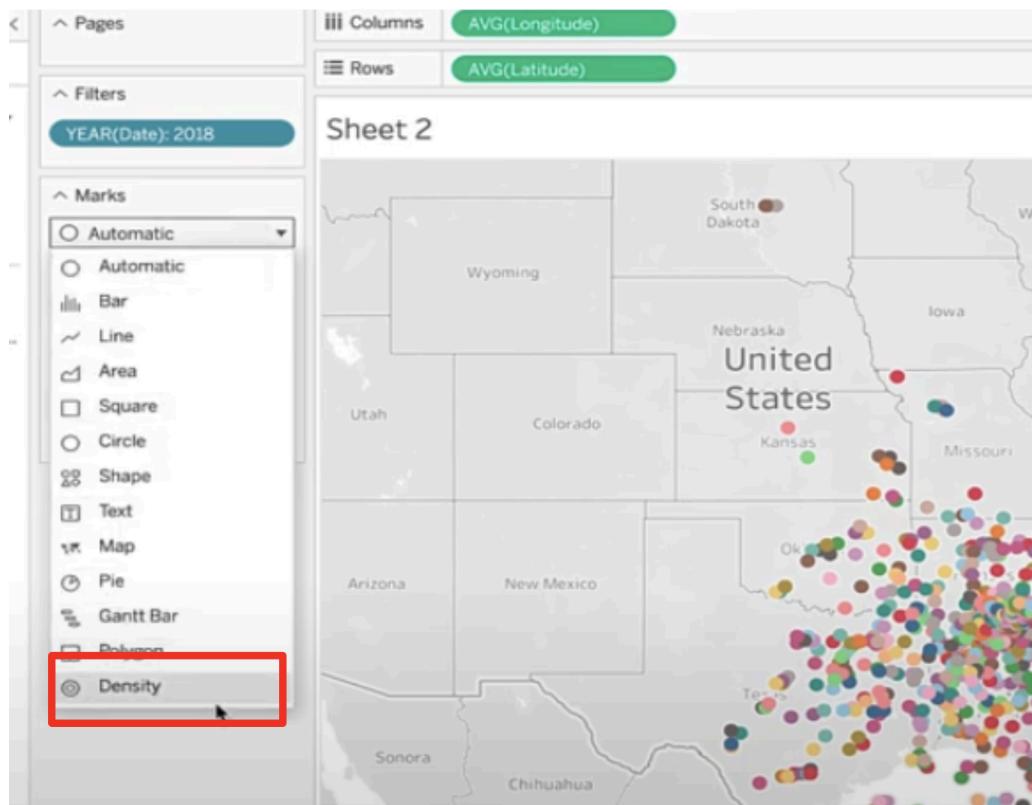
- Click on NUMBER OF STRIKES dropdown.
- Select “Convert to Dimension.”



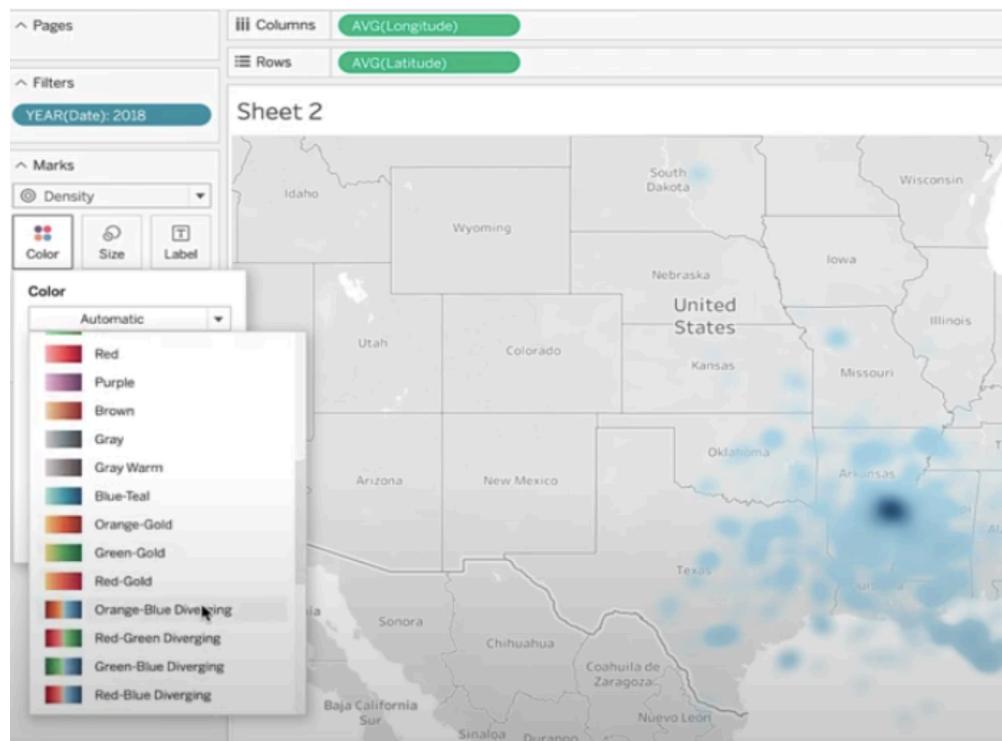
- Drag NUMBER of STRIKES to the box labeled COLOR.



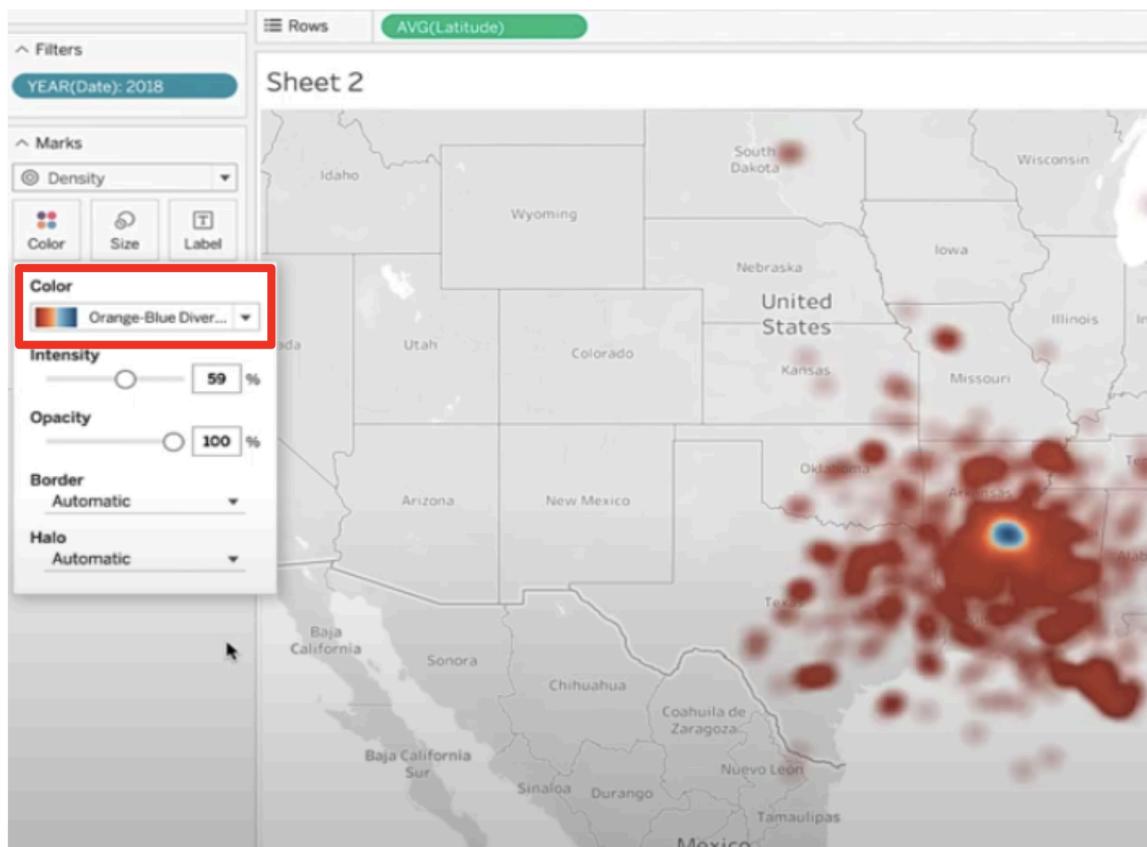
- Select Density in MARKS dropdown.



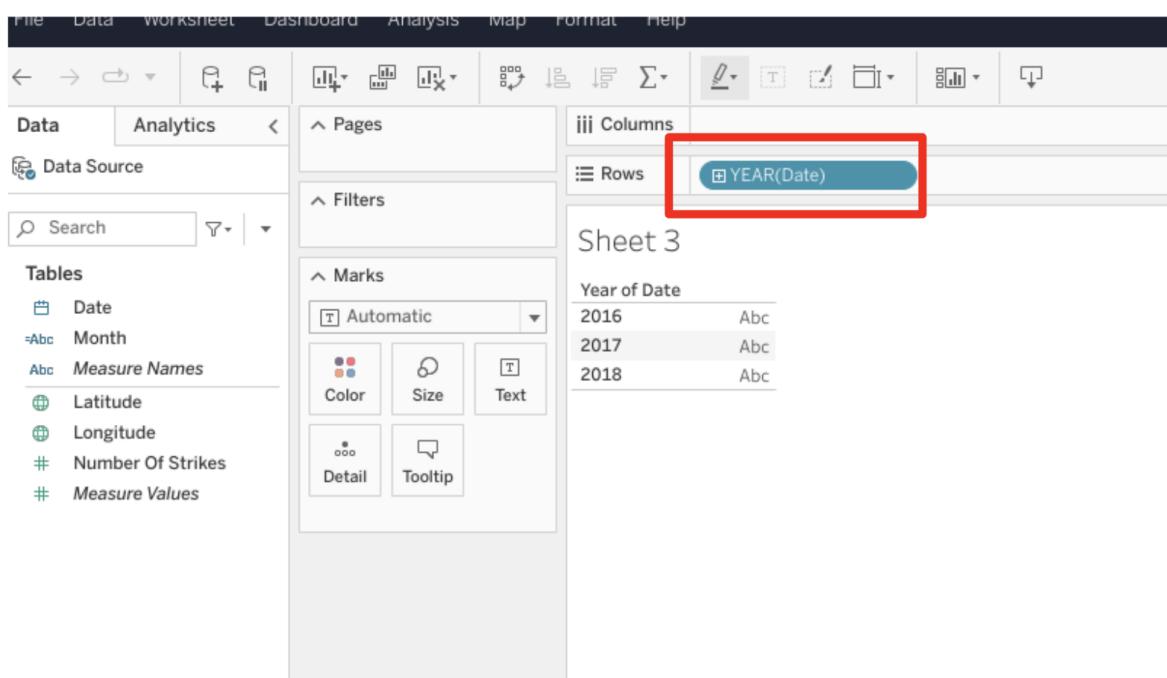
- Click on color and show the dropdown. Select any color you'd like.



- And here is your geographic map of the location of lightning strikes in the U.S. in 2018.



- Click on “new worksheet.”
- Drag DATE to the ROW field and select YEAR.



- Click on DATE dropdown in the “Tables” menu. Click CREATE and select Calculated Field.

The screenshot shows the Tableau interface with the 'Data' tab selected. In the 'Tables' section, 'Date' is selected. A context menu is open, with the 'Create' option expanded. The 'Calculated Field...' option is highlighted with a red box.

Sheet 3

Year of Date

Year of Date	Value
2016	Abc
2017	Abc
2018	Abc

- Type in Month for Calculated Field name.
- Type into field:
 - LEFT(DATENAME('month',[date]),3)
 - Click Apply.
 - Click OK.
- Drag month to column field.

The screenshot shows the Tableau interface with the 'Data' tab selected. In the 'Tables' section, 'Month' is selected. A context menu is open, with the 'Create' option expanded. The 'Calculated Field...' option is highlighted with a red box.

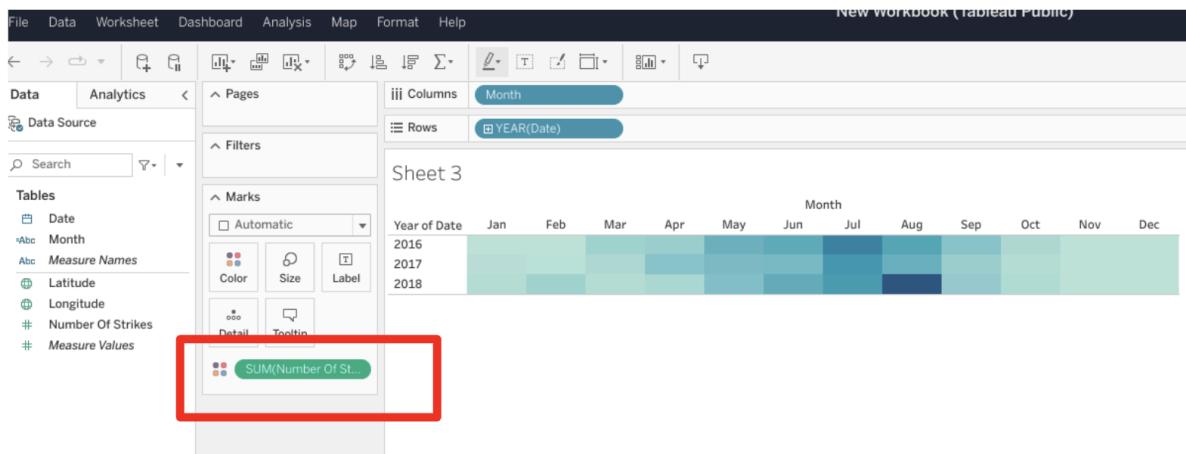
Sheet 3

Year of Date

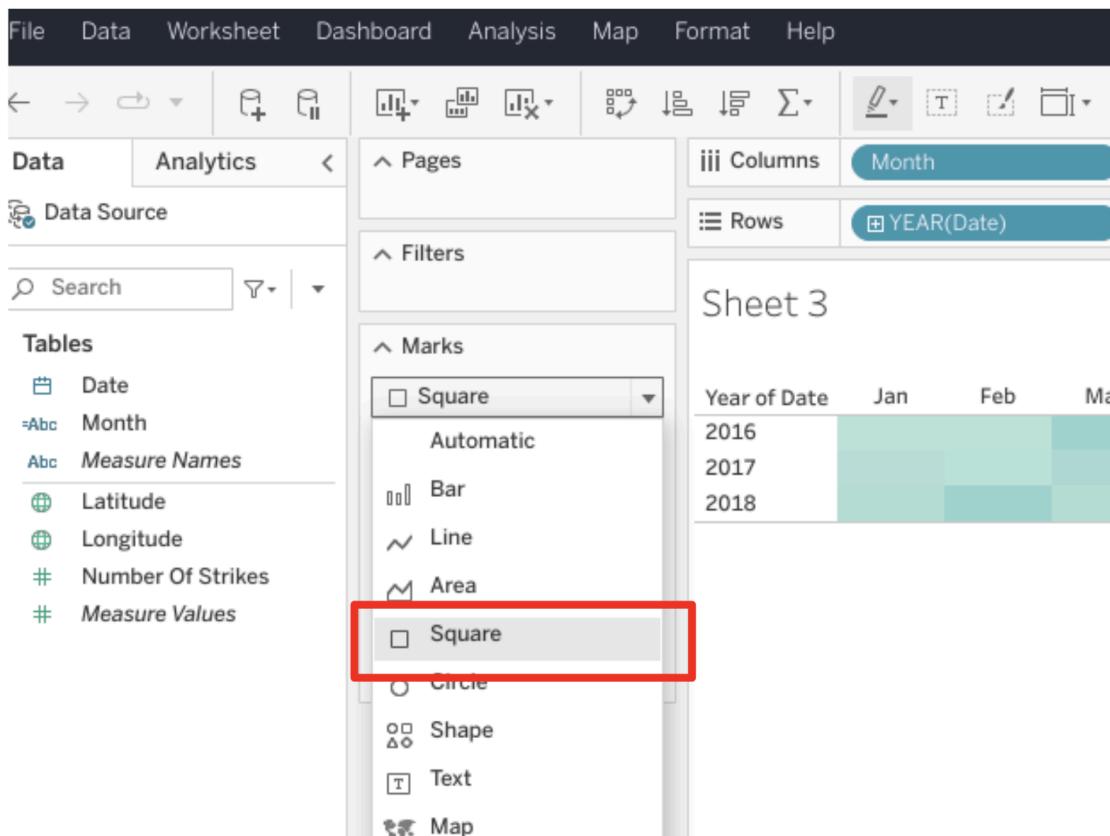
Year of Date	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2016	Abc											
2017	Abc											
2018	Abc											

- Drag NUMBER of STRIKES to the color square under the MARKS field.

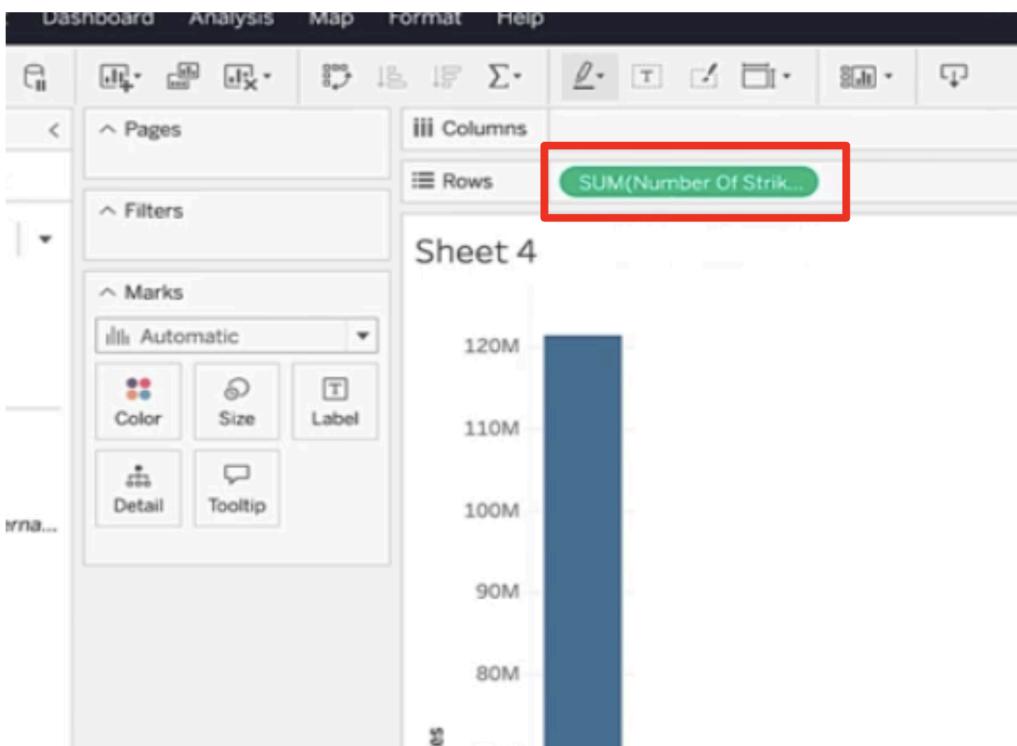
- Make sure NUMBER of STRIKES is converted to Measure. To do so, right click on Number of Strikes field and select 'Convert to Measure.'



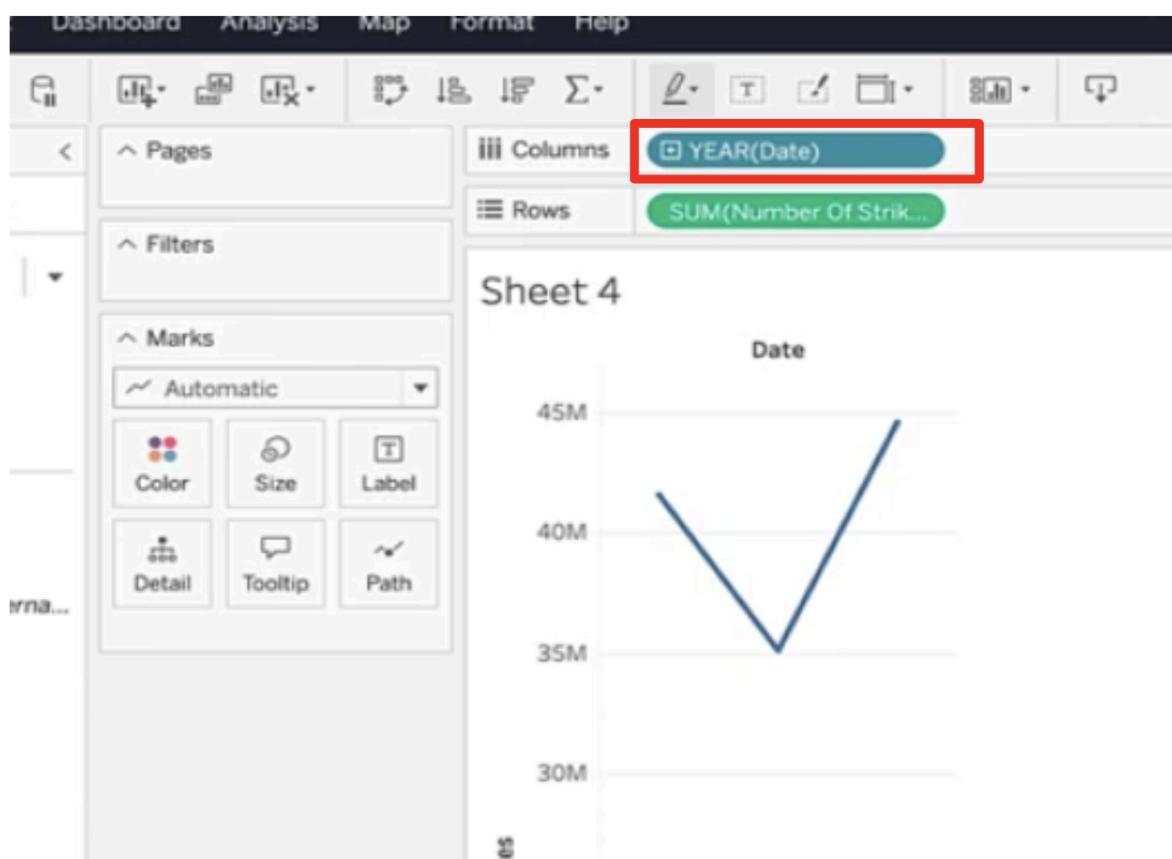
- In Marks dropdown, select SQUARE.



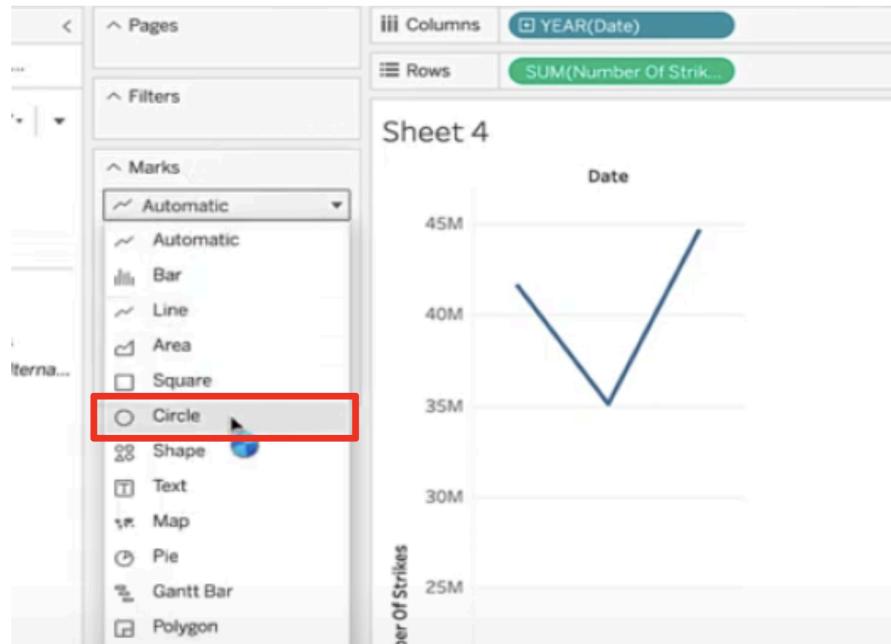
- Feel free to change the color. You've completed a heatmap.
- Click on NEW WORKSHEET.
- Drag NUMBER OF STRIKES to the rows field.



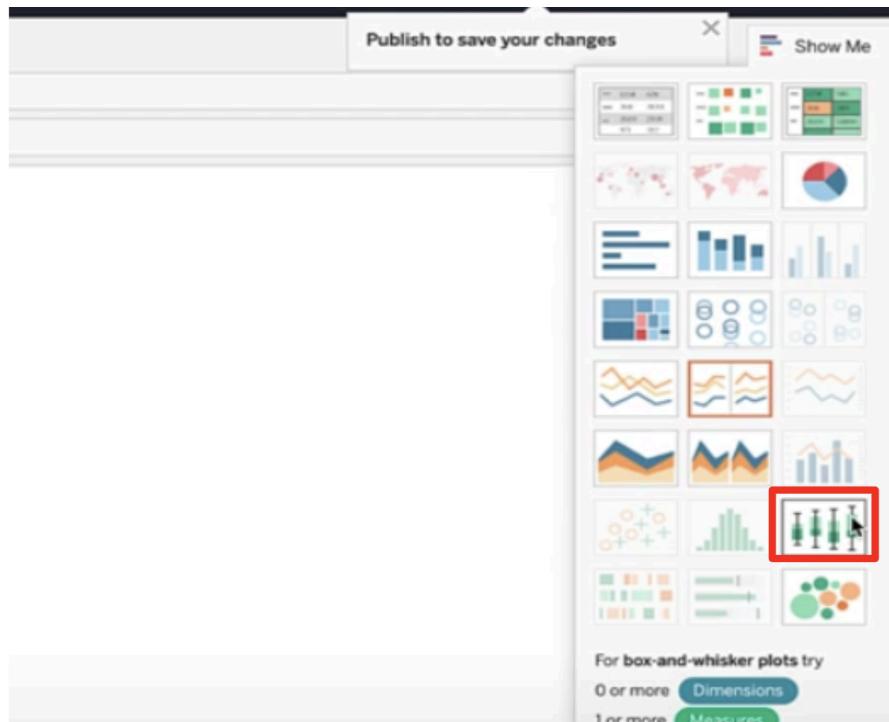
- Drag DATE to the column field and select YEAR.



- **Note:** If nothing is shown in the Columns field, drag YEAR back to the Columns filter again.
- Select CIRCLE from MARKS dropdown.



- **Note:** If box plot isn't the default, select the BOX and WHISKER PLOT from the SHOW ME dropdown.
- Drag Date to the column field again, if that has been removed.



- Drag DATE into the detail square under the MARKS field, and select DAY. **Note:** When you do this, you'll see that Tableau changes your YEAR(Date) filter to QUARTER(Date) to show an additional level of detail. That change is shown in the instructional video, so please proceed.
- Now you've completed a boxplot.
- Click on NEW WORKSHEET.
- Click on the dropdown of NUMBER of STRIKES in Table menu, and select CREATE and then BINS.

The screenshot shows the Table menu open for the field "Number Of Strikes". The "Create" option is selected, revealing a submenu with "Calculated Field...", "Group...", "Bins...", and "Parameter...". The "Bins..." option is highlighted with a red box. In the background, the Marks shelf is visible, showing "Circle" selected under "Shape". Other options include "Color", "Size", "Label", "Detail", and "Tooltip".

Tables

- Date
- =Month
- Measure Names
- Latitude
- Longitude
- # Number Of Strikes
- # Add to Sheet

Duplicate
Rename
Hide

Create ▾

- Calculated Field...
- Group...
- Bins...**
- Parameter...

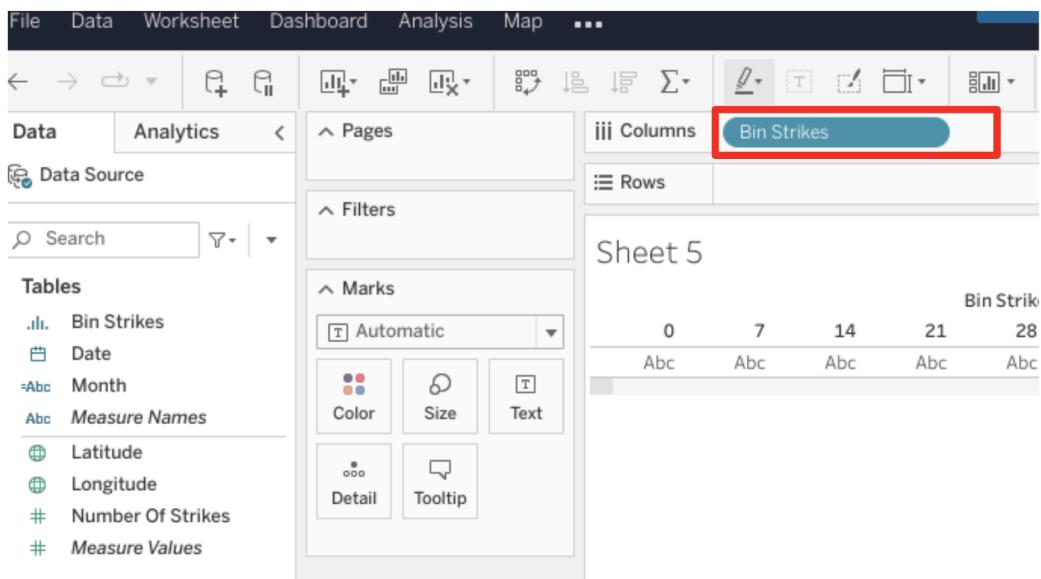
Convert to Discrete
Convert to Dimension
Change Data Type ▾
Geographic Role ▾
Folders ▾
Default Aggregation ▾
Describe...

Marks

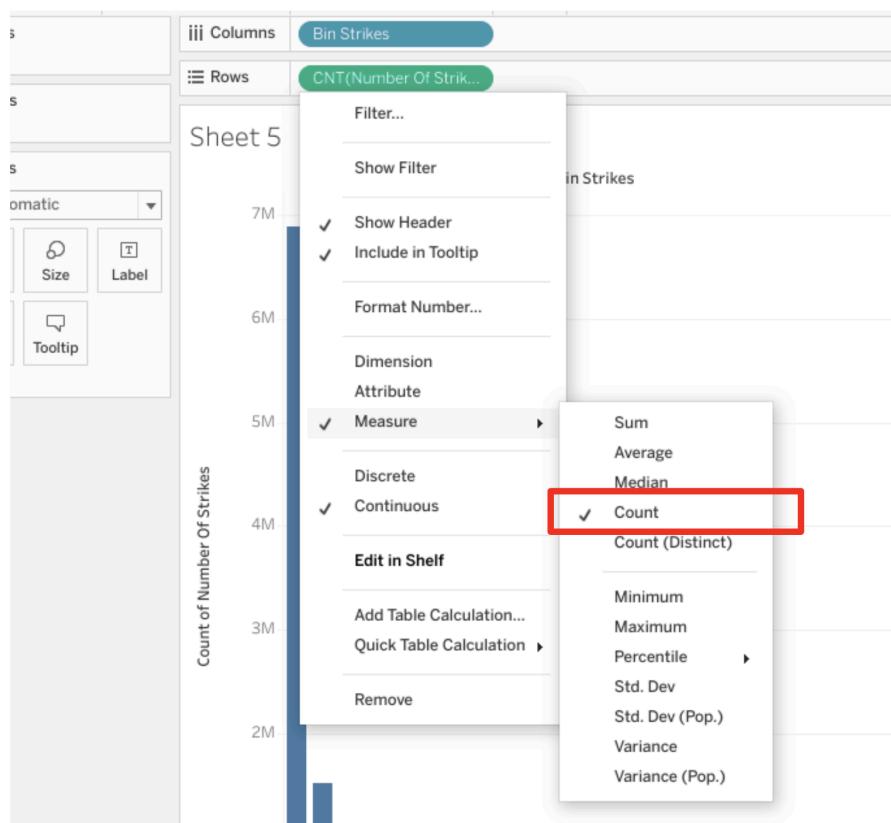
- Circle
- Color
- Size
- Label
- Detail
- Tooltip

DAY(Date)

- Give bin a name: BIN STRIKES.
- Select a number between 5 and 10 for “Size of Bins” field.
- Drag BIN STRIKES to columns field.



- Drag NUMBER OF STRIKES to Row Field.
- In NUMBER of STRIKES dropdown, make sure COUNT is selected.



- Drag NUMBER of STRIKES to filter field.
- Limit the field numbers between 1 and 200.
- Drag NUMBER of STRIKES to the LABEL.
- Select COUNT.
- Change color as desired.
- Now you know how to create a histogram!

