



Reading: 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.

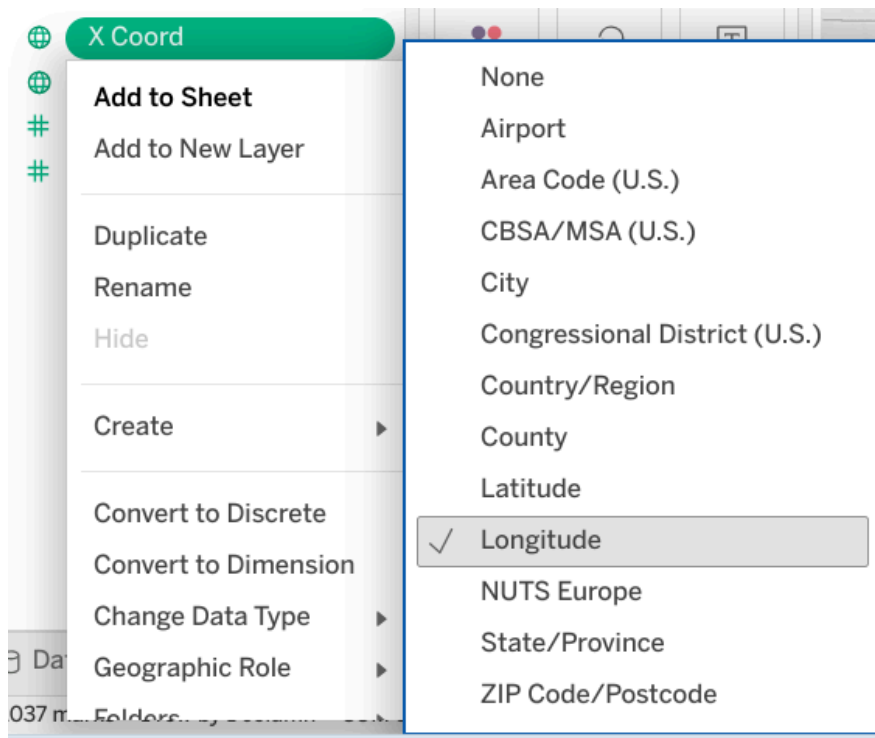
Instructions

- 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 the reading: **Download your datasets and begin presenting with Tableau**. 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.

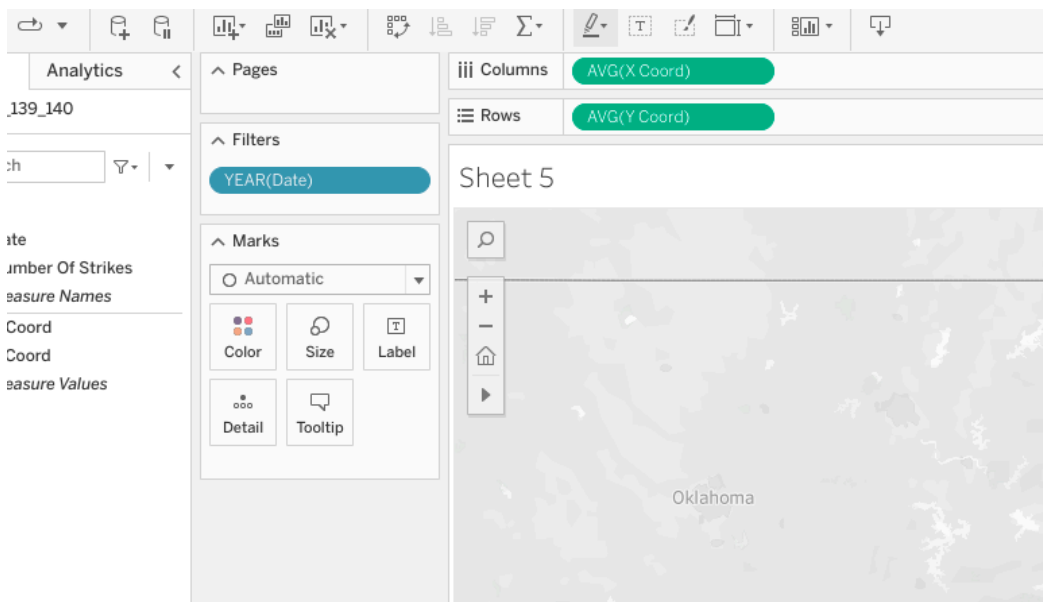
Note: Please allow several minutes for data import into a new worksheet.

Sheet 1- Map

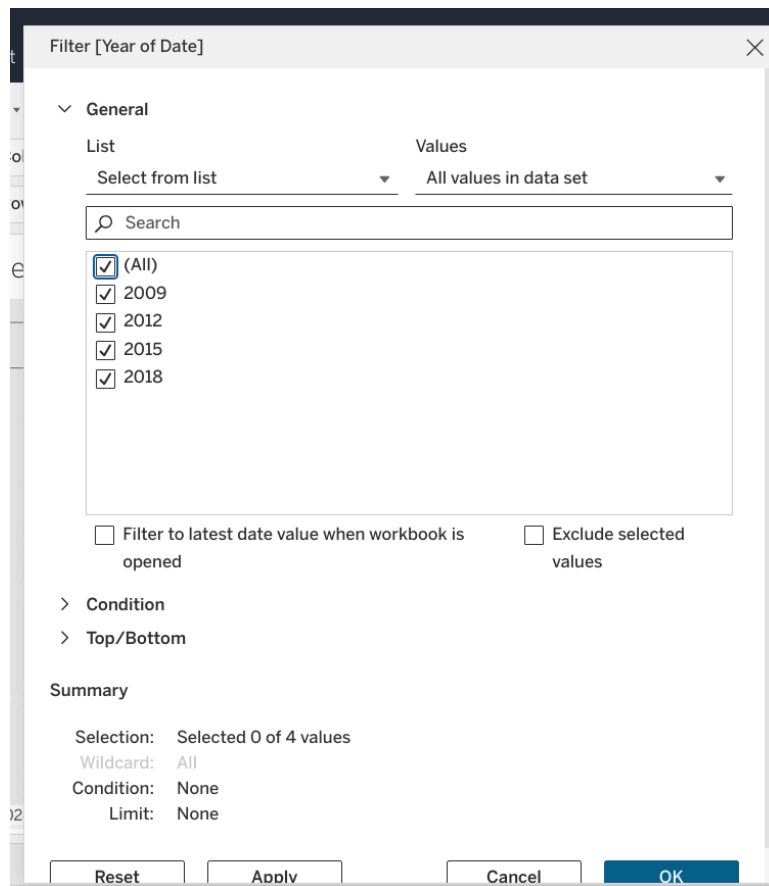
- Set the geographic role of the X coord to Longitude
- Set the geographic role of the Y coord to Latitude



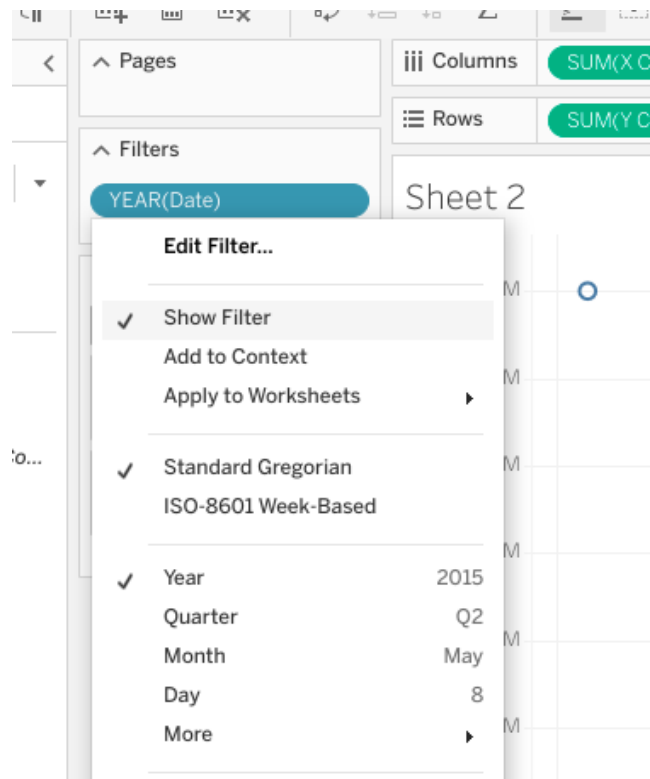
- Drag X coord to Column field. Drag Y coord to Row field.
- Drag DATE to FILTERS.



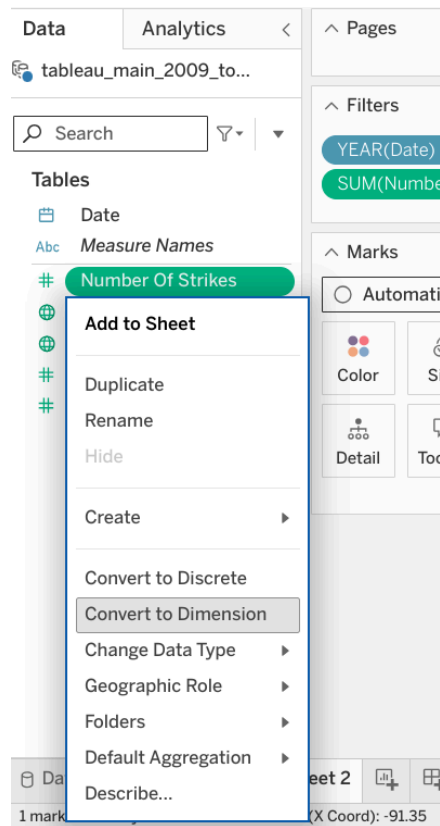
- Select **Years**. This will be a filter. Select All.



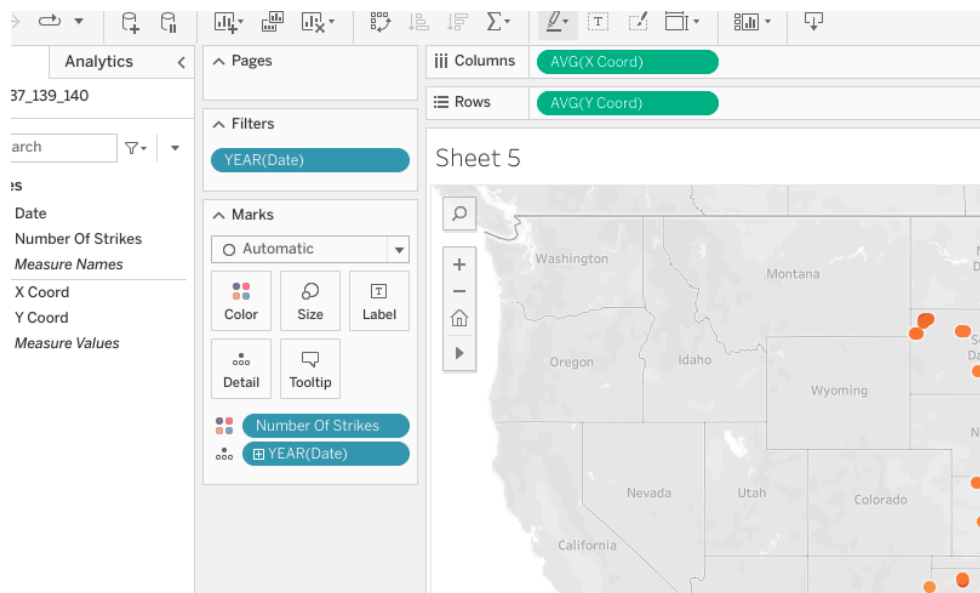
- Click on DATE dropdown, select SHOW FILTER.



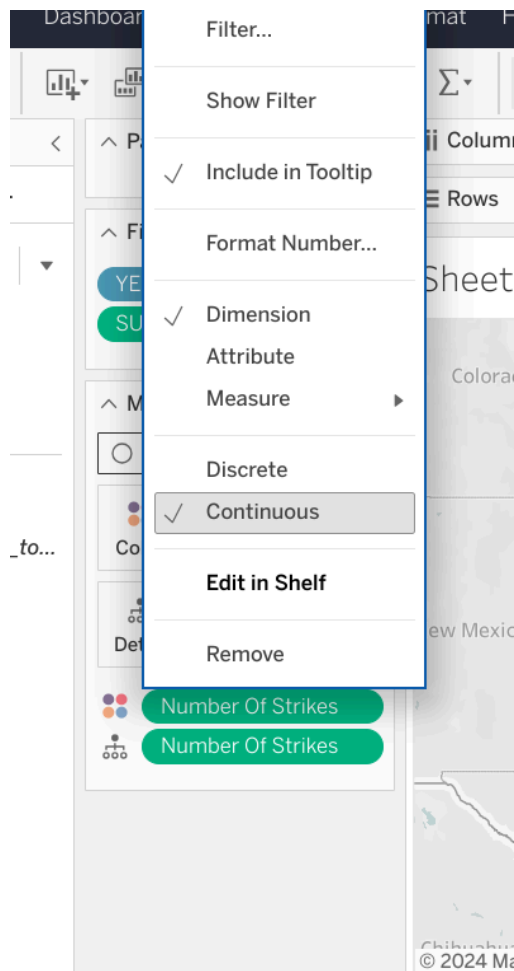
- Click on NUMBER of STRIKES and select CONVERT to DIMENSION



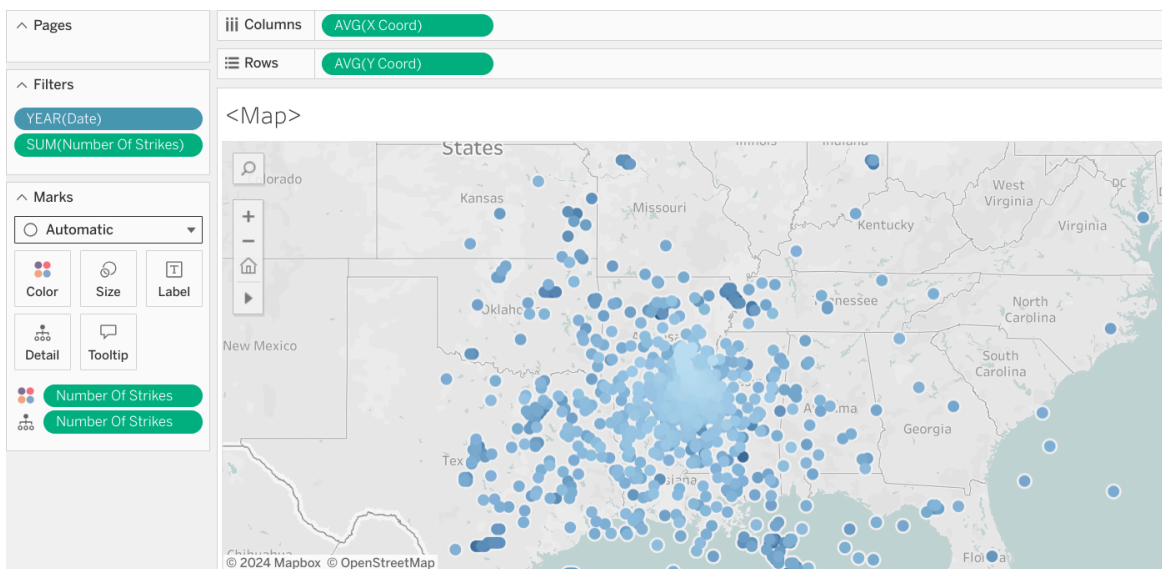
- Drag NUMBER of STRIKES into both the COLOR square and DETAIL square inside the MARKS box.



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

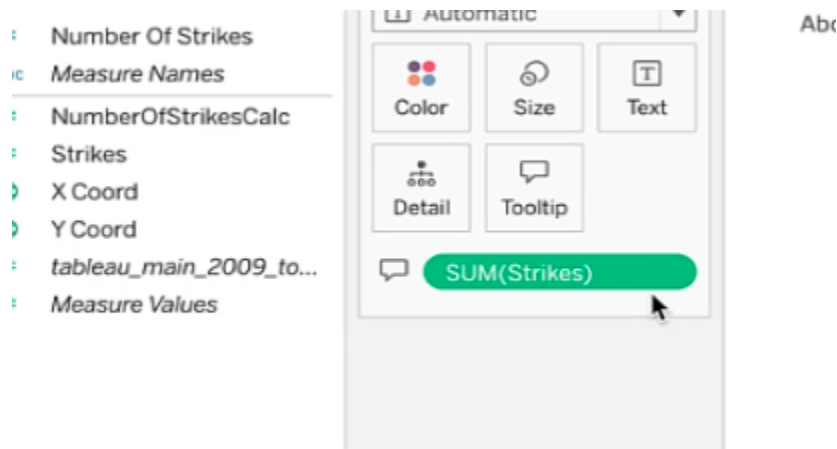


- Before moving on to the next Sheet, title Sheet 1 Map. You can do this under Rows between <> by clicking in that space.

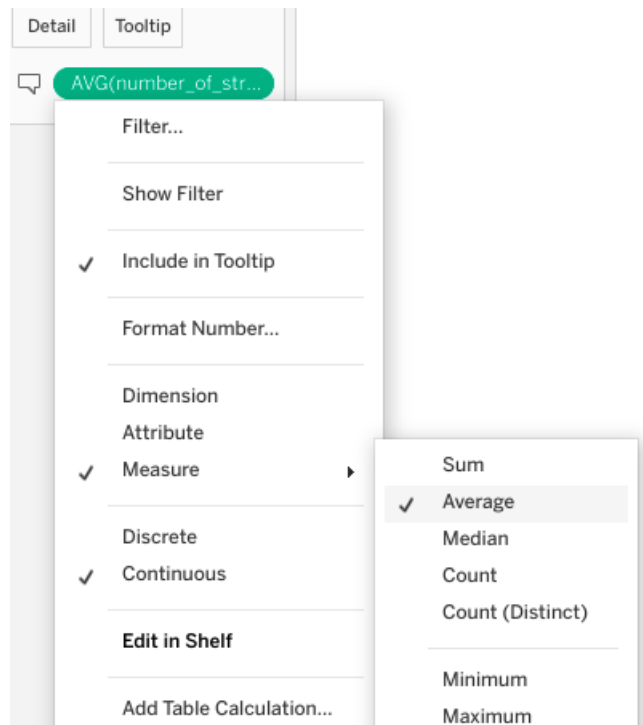


Sheet 2

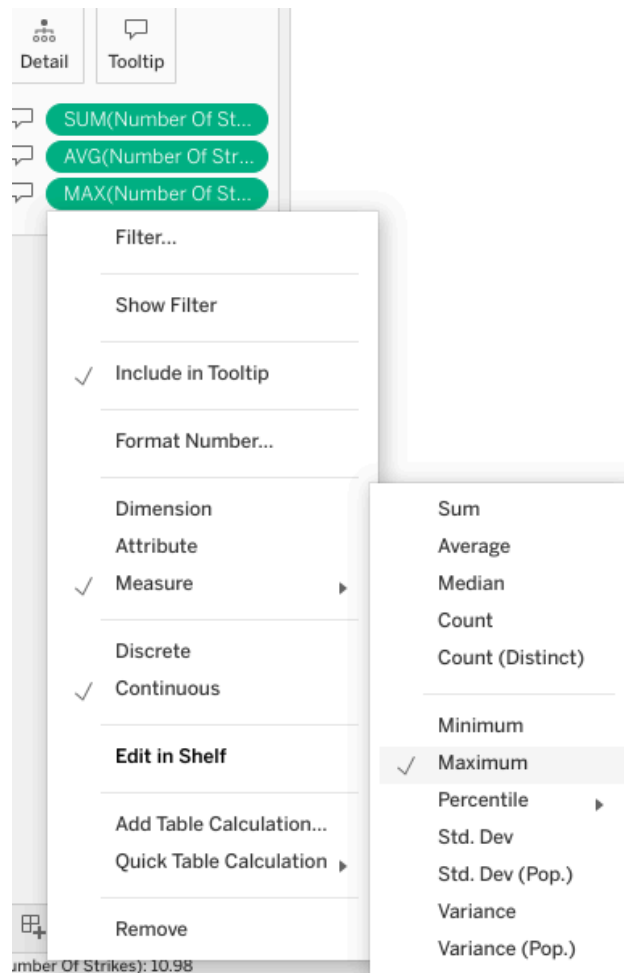
- In the same Tableau Workbook, Click on NEW WORKSHEET.
- Click dropdown of NUMBER of STRIKES field.
- Select CREATE and CALCULATED FIELD.
- TYPE "Strikes" for the title.
- Click OK.
- Drag calculation into TOOLTIP field.



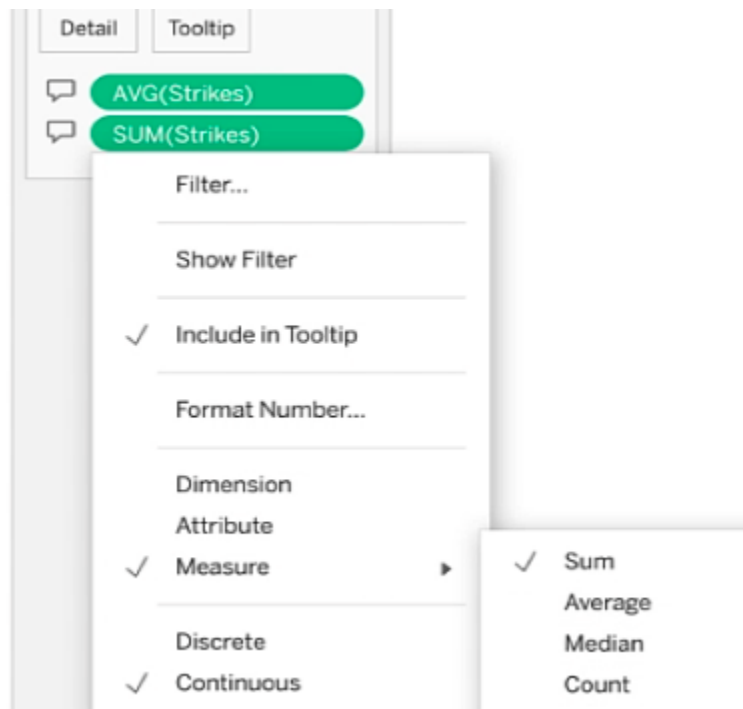
- In the Strikes drop down, Select MEASURE, then AVERAGE.



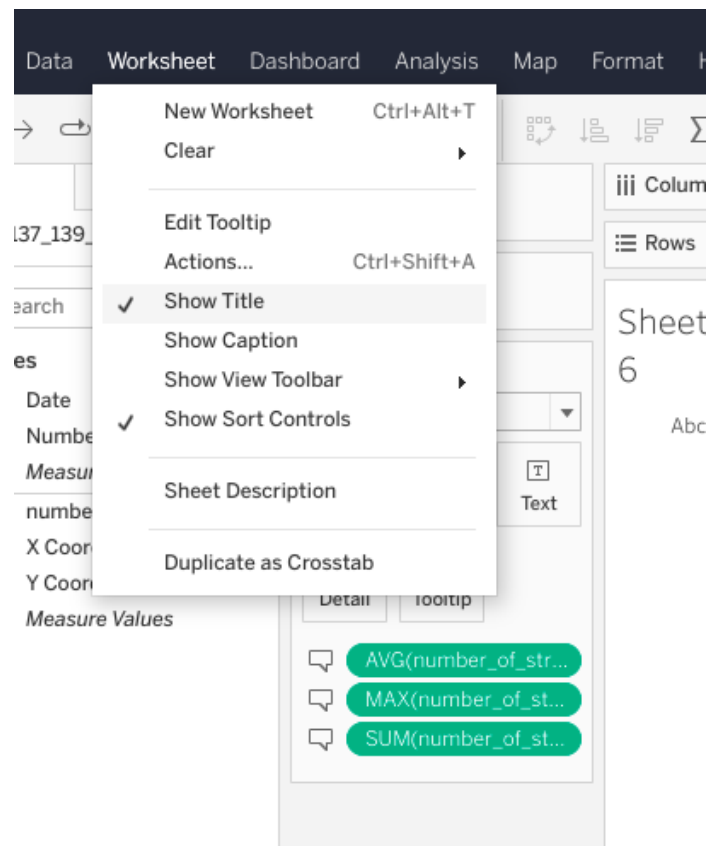
- Drag calculation field to TOOLTIP again. Select MEASURE, then MAXIMUM.



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



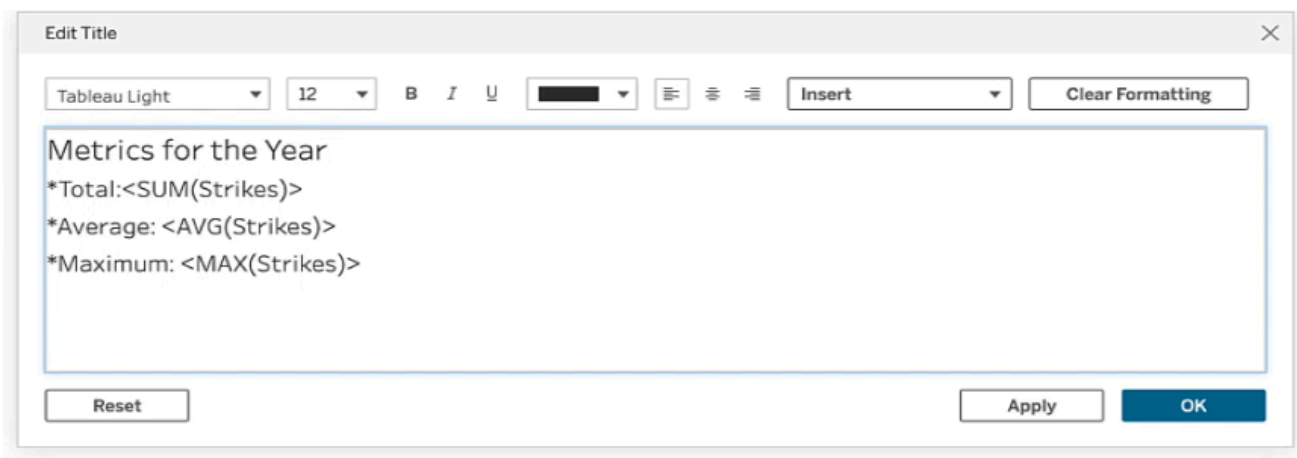
- Click on WORKSHEET and select SHOW TITLE.



- Type in 'Metrics for the Year' in title field.
- Then add the following beneath it:

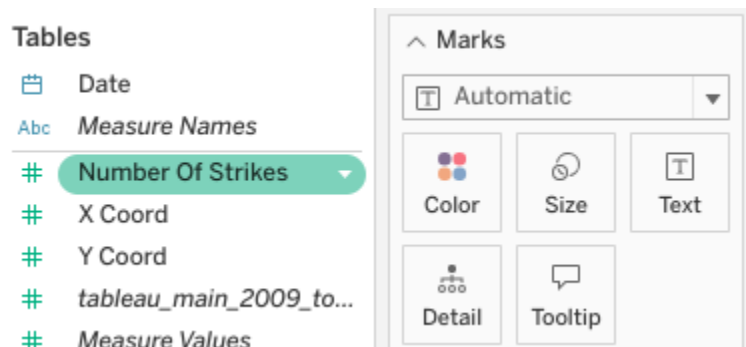
*Total: <SUM(Strike)>
 * Average: <AVG(Strike)>
 * Maximum: <MAX(Strike)>'

- Click OK.

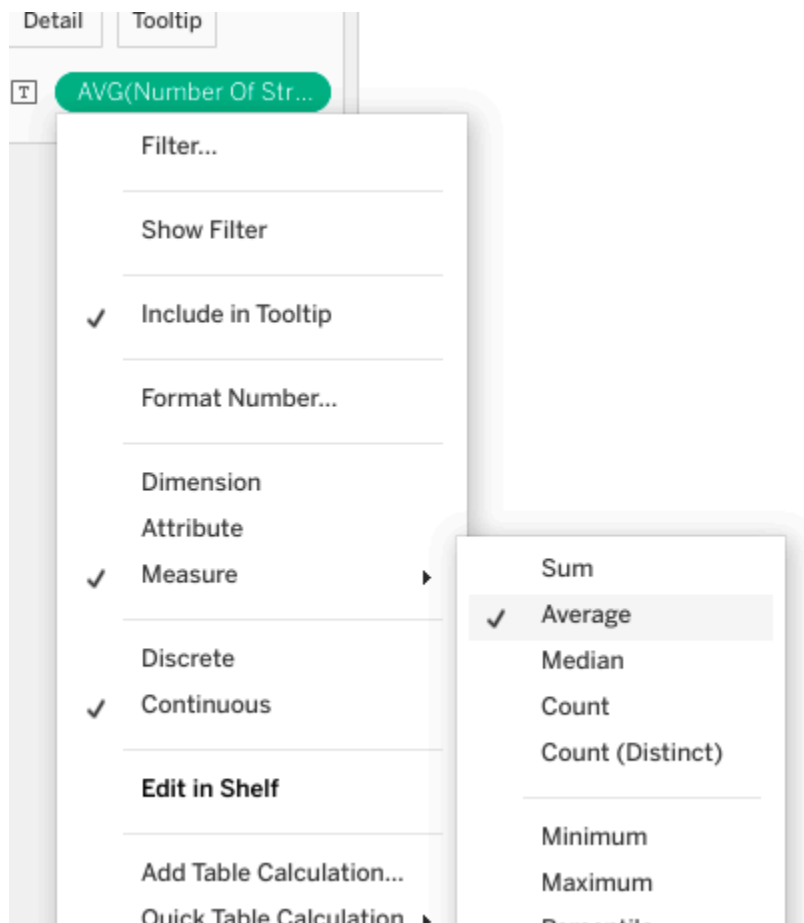


Sheet 3

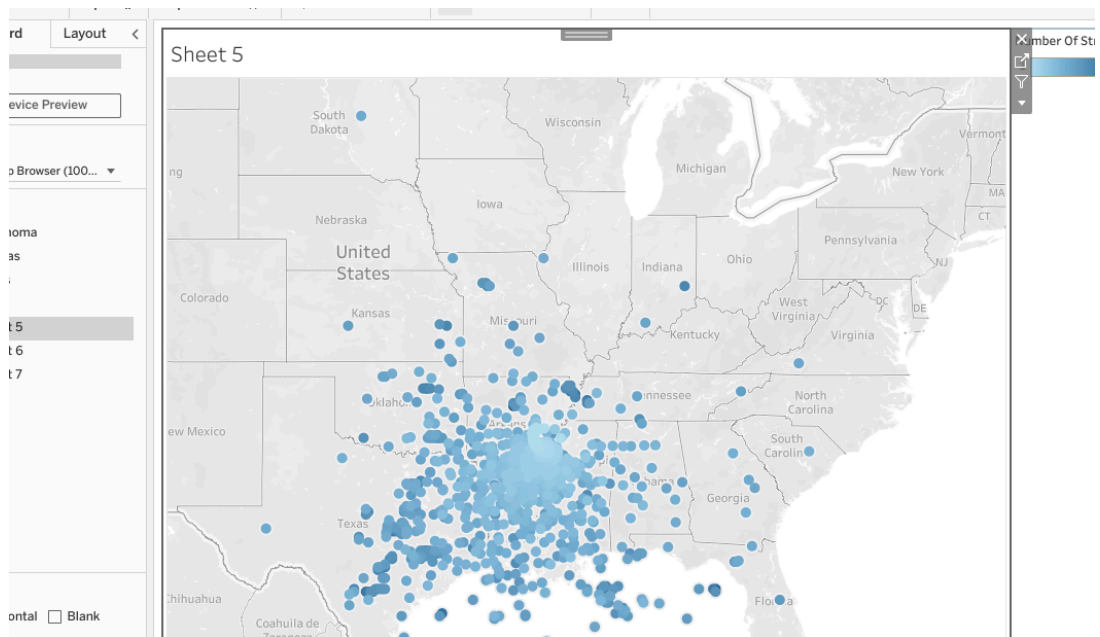
- Click on NEW WORKSHEET.
- Drag NUMBER of STRIKES to the TEXT square in the MARKS field.



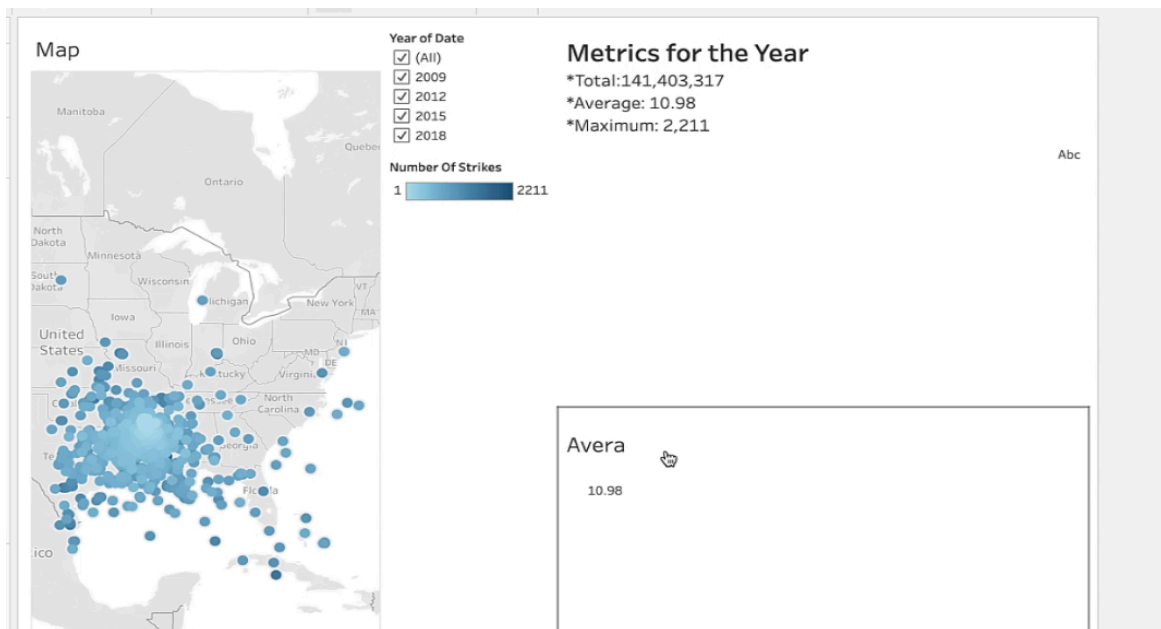
- From dropdown, select MEASURE and AVERAGE.



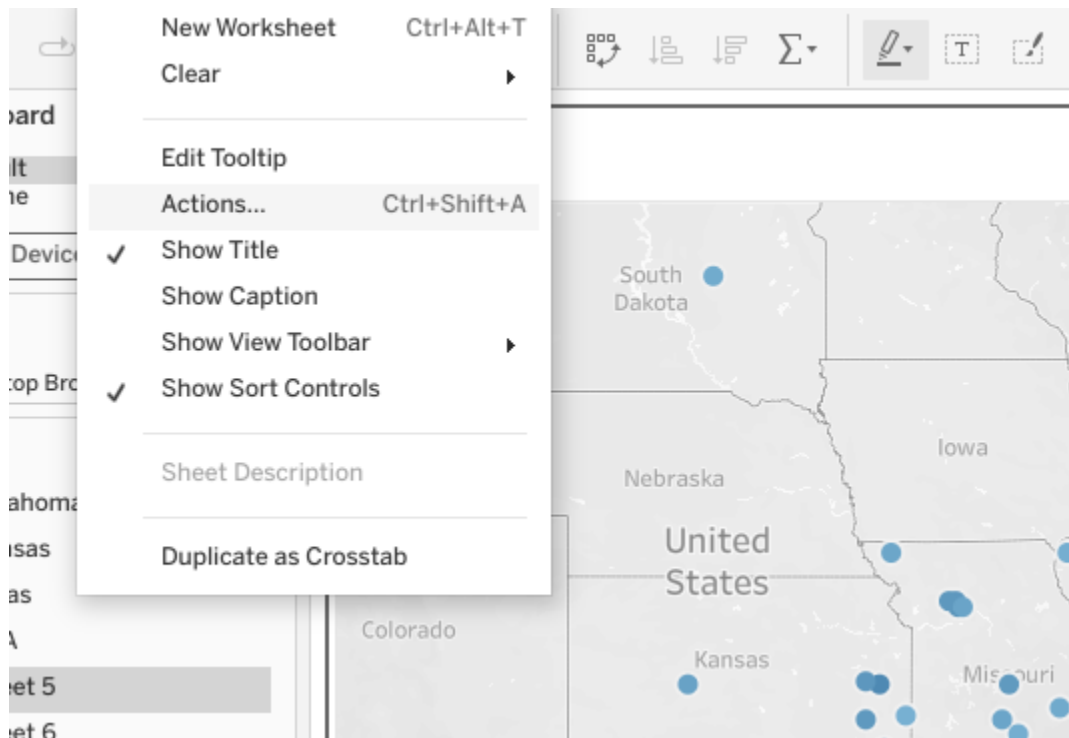
- Click on NEW DASHBOARD.
- Drag USA map worksheet to empty dashboard.



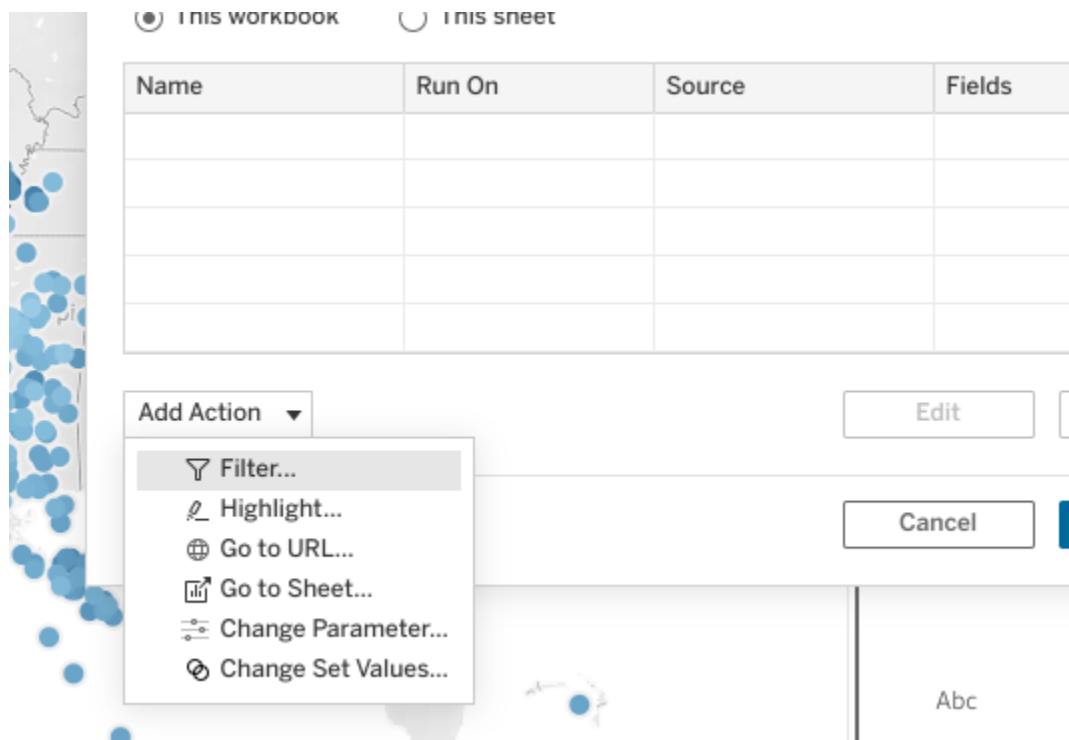
- Drag your other two worksheets to the dashboard.



- Click map, then select WORKSHEET and ACTIONS.



- Select ADD ACTION and FILTER.



- 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.
- 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

<input type="checkbox"/>	Source Field	Target Data Source	Target Field
<input type="checkbox"/>	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!
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