



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.

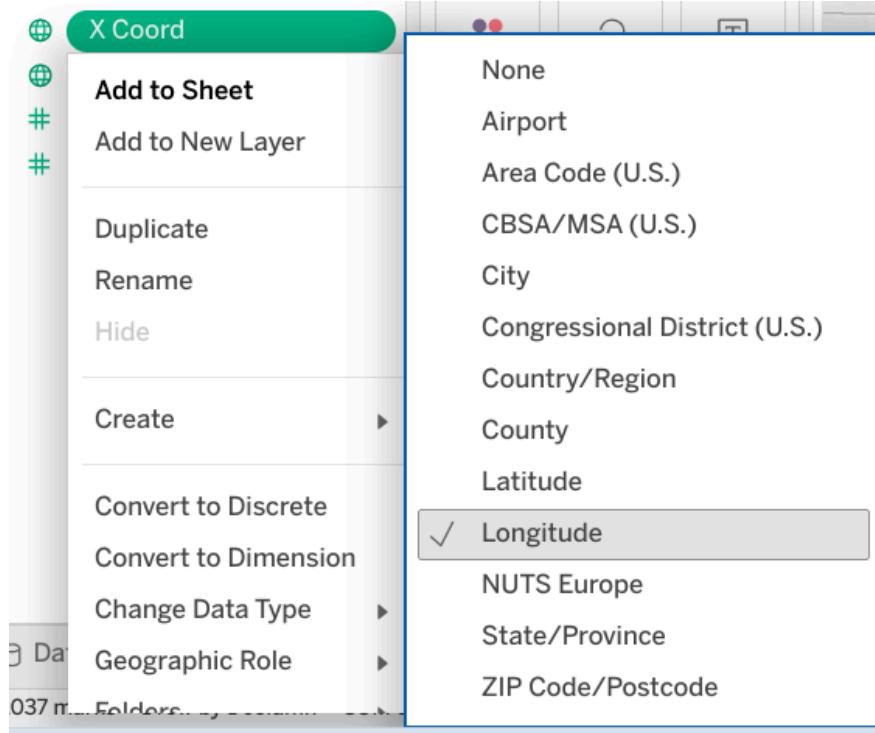
Instructions

- 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.

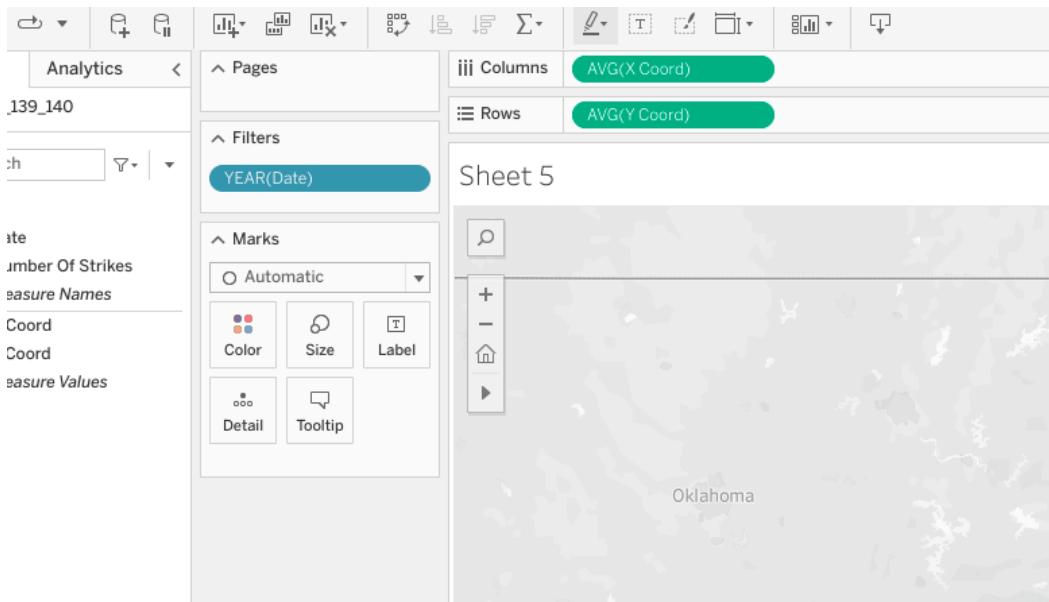
Note: Please allow several minutes for data import into a new worksheet.

Sheet 1- Map

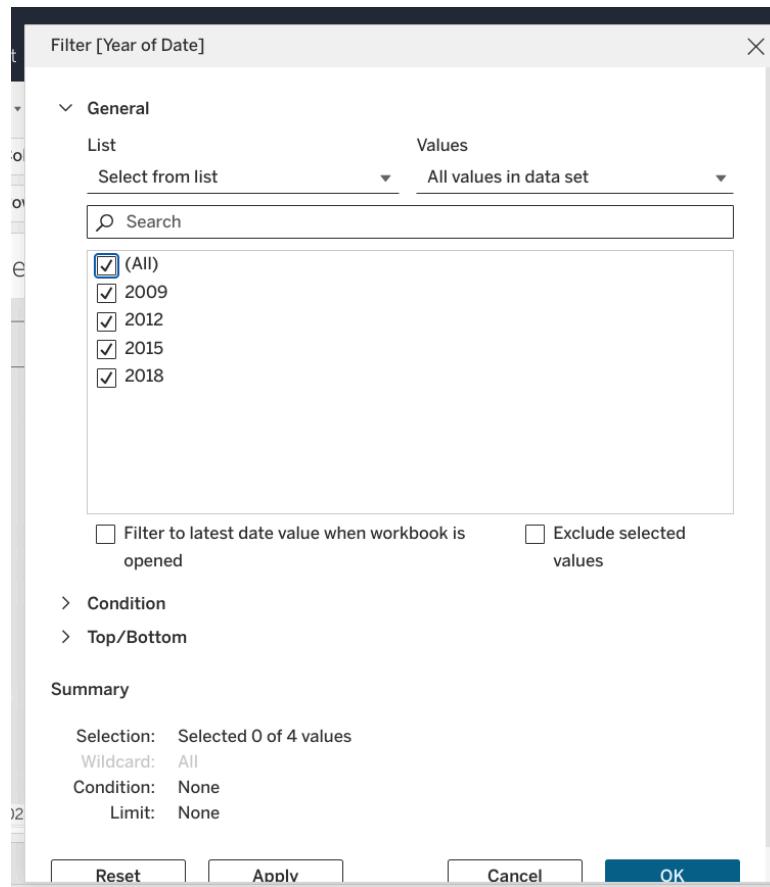
- Set the geographic role of the X coord to Longitude
- Set the geographic role of the Y coord to Latitude



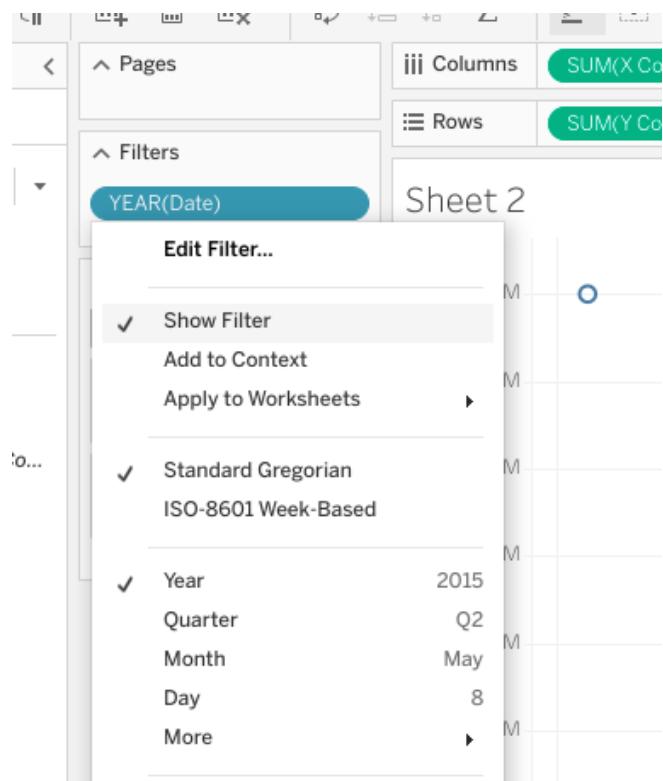
- Drag X coord to Column field. Drag Y coord to Row field.
- Drag DATE to FILTERS.



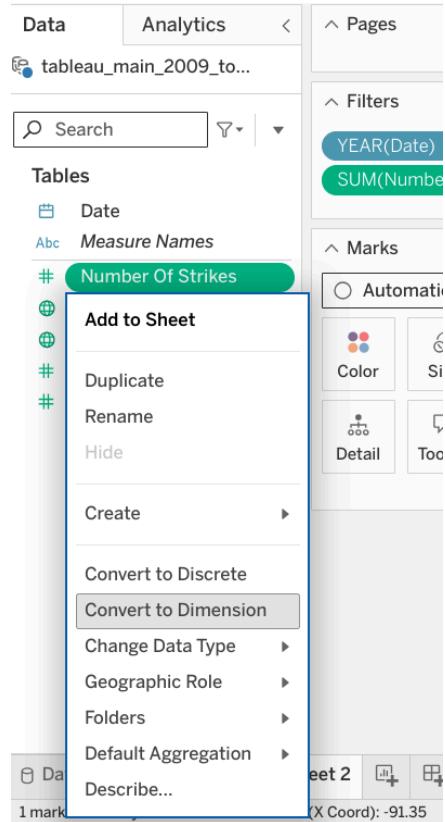
- Select **Years**. This will be a filter. Select All.



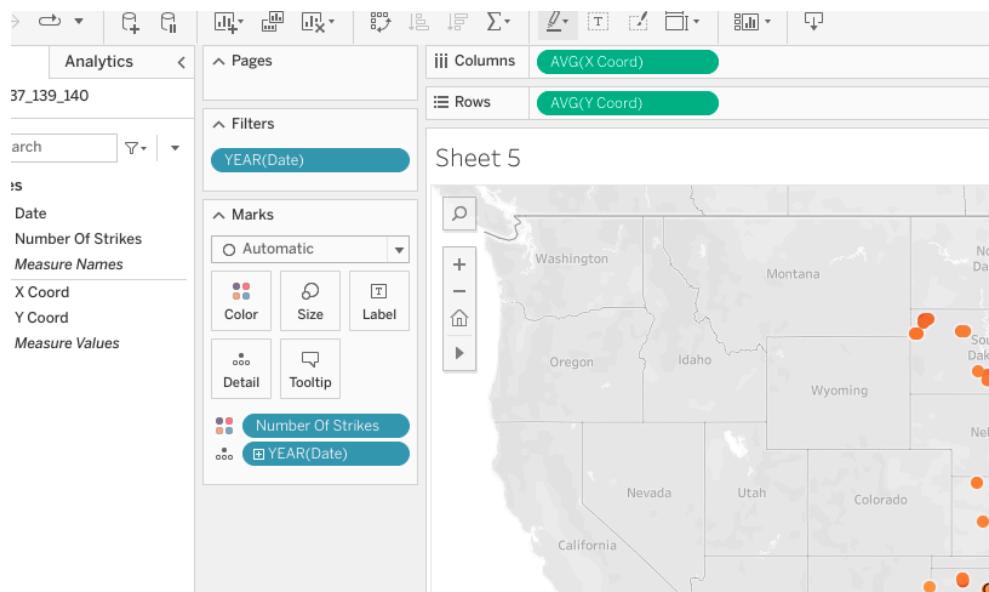
- Click on DATE dropdown, select SHOW FILTER.



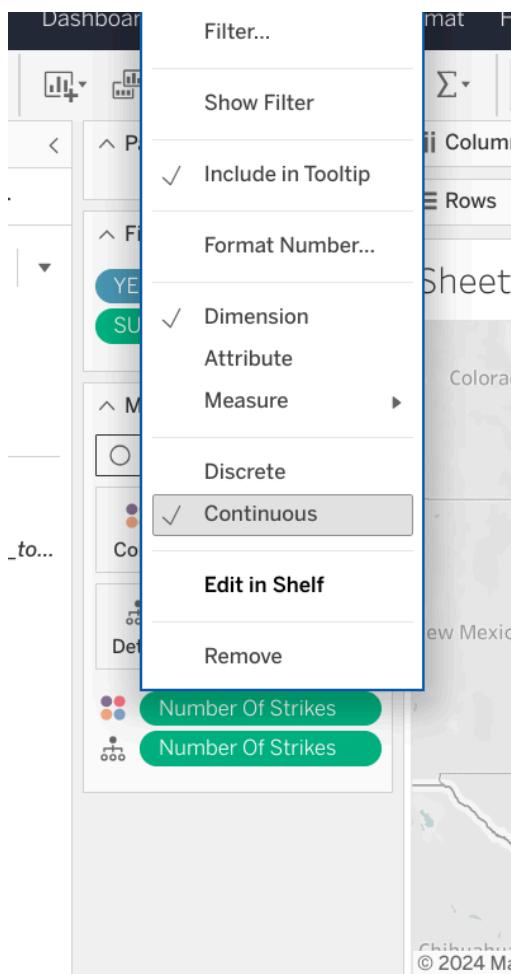
- Click on NUMBER of STRIKES and select CONVERT to DIMENSION



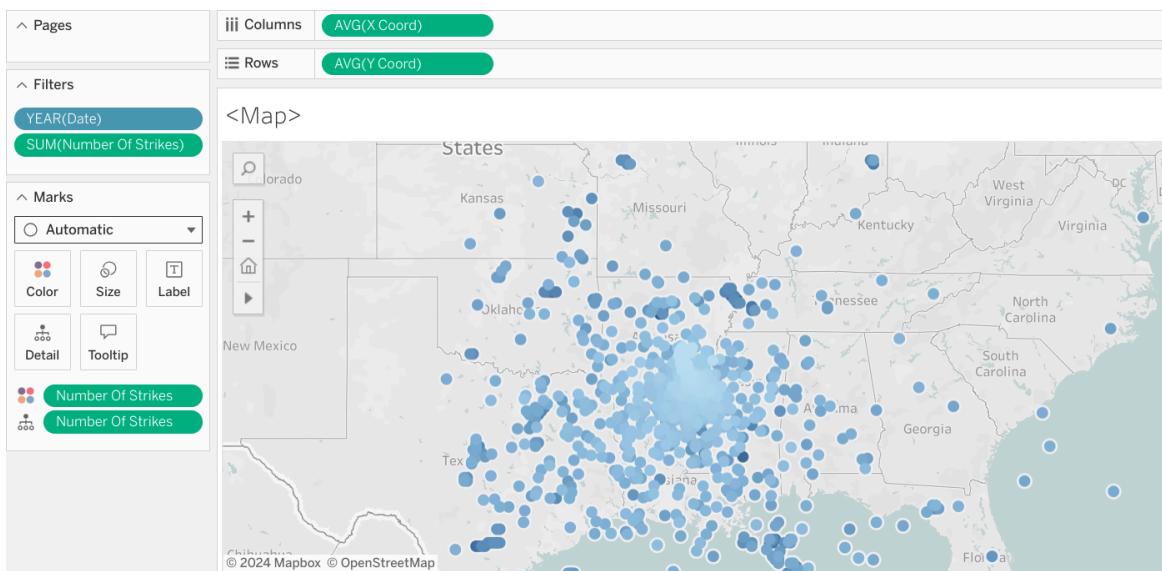
- Drag NUMBER of STRIKES into both the COLOR square and DETAIL square inside the MARKS box.



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

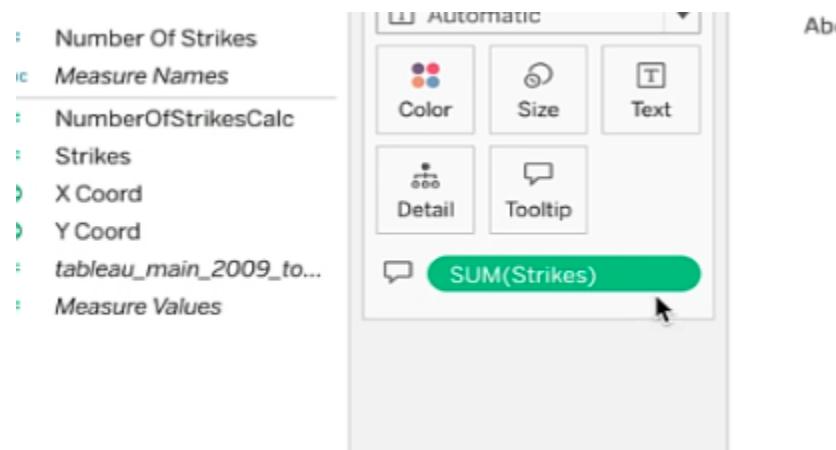


- Before moving on to the next Sheet, title Sheet 1 Map. You can do this under Rows between <> by clicking in that space.

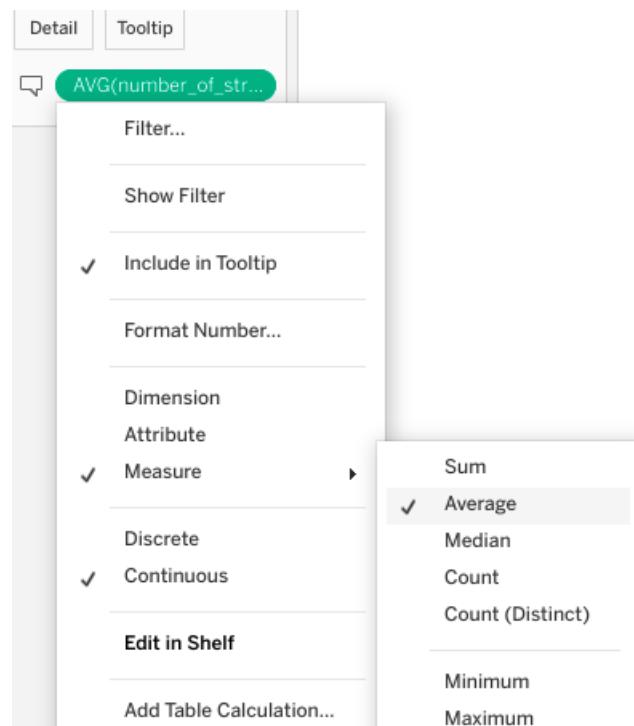


Sheet 2

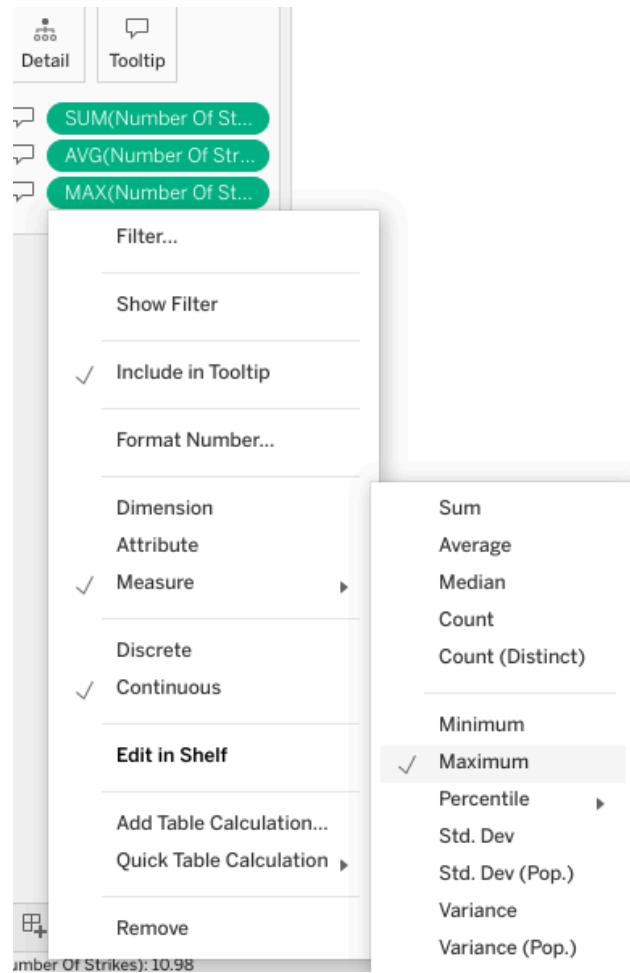
- In the same Tableau Workbook, Click on NEW WORKSHEET.
- Click dropdown of NUMBER of STRIKES field.
- Select CREATE and CALCULATED FIELD.
- TYPE “Strikes” for the title.
- Click OK.
- Drag calculation into TOOLTIP field.



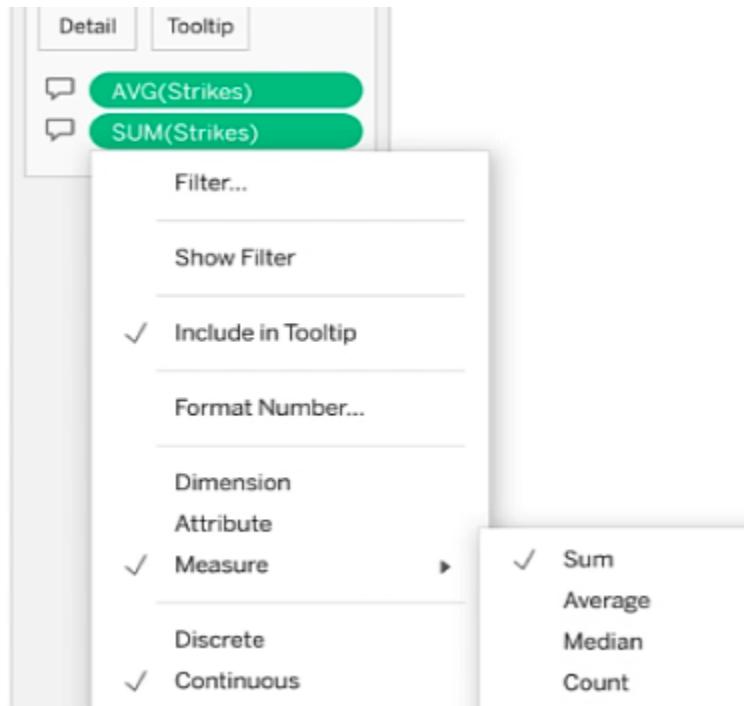
- In the Strikes drop down, Select MEASURE, then AVERAGE.



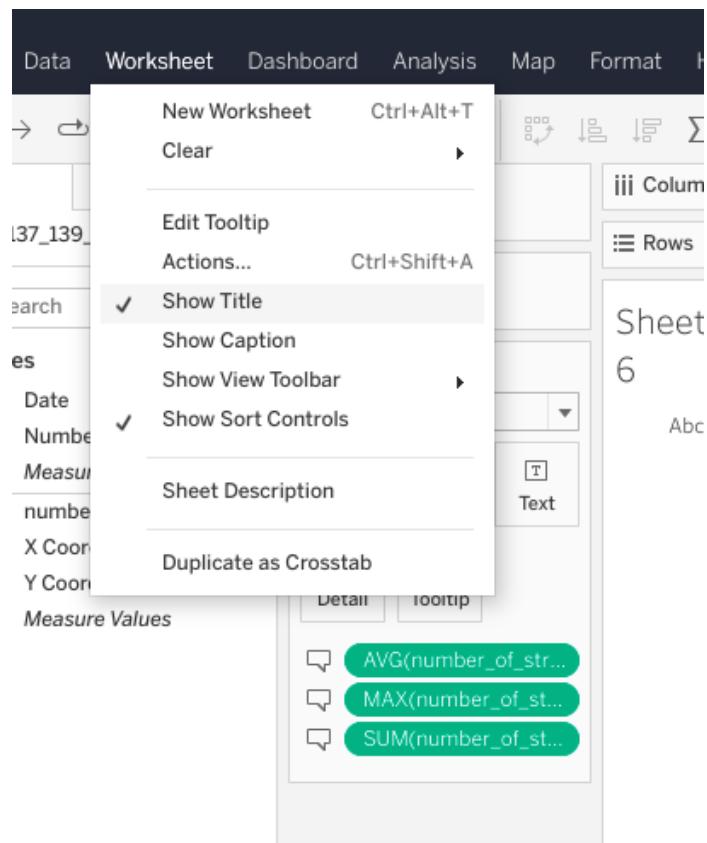
- Drag calculation field to TOOLTIP again. Select MEASURE, then MAXIMUM.



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



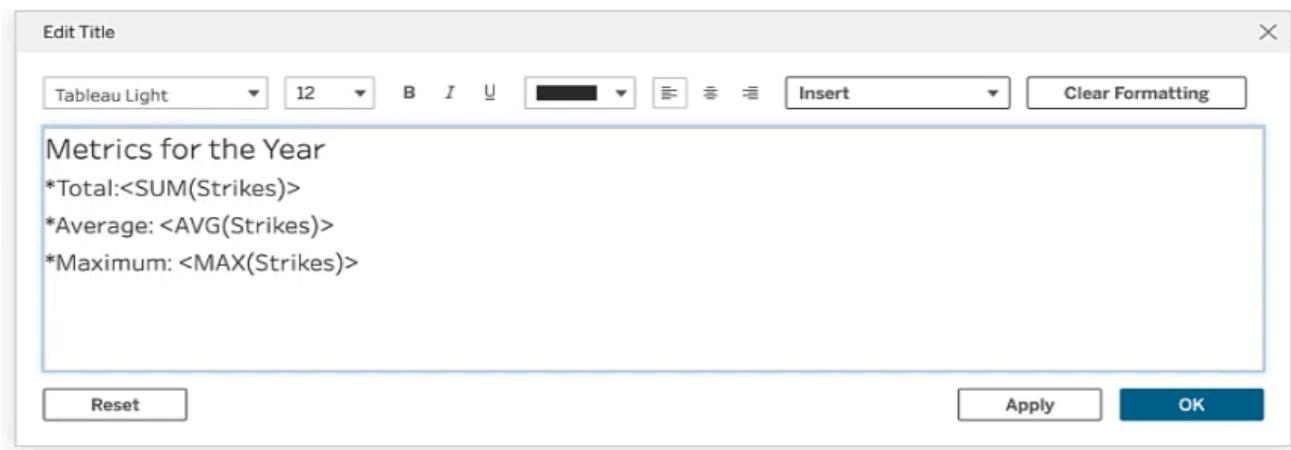
- Click on WORKSHEET and select SHOW TITLE.



- 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

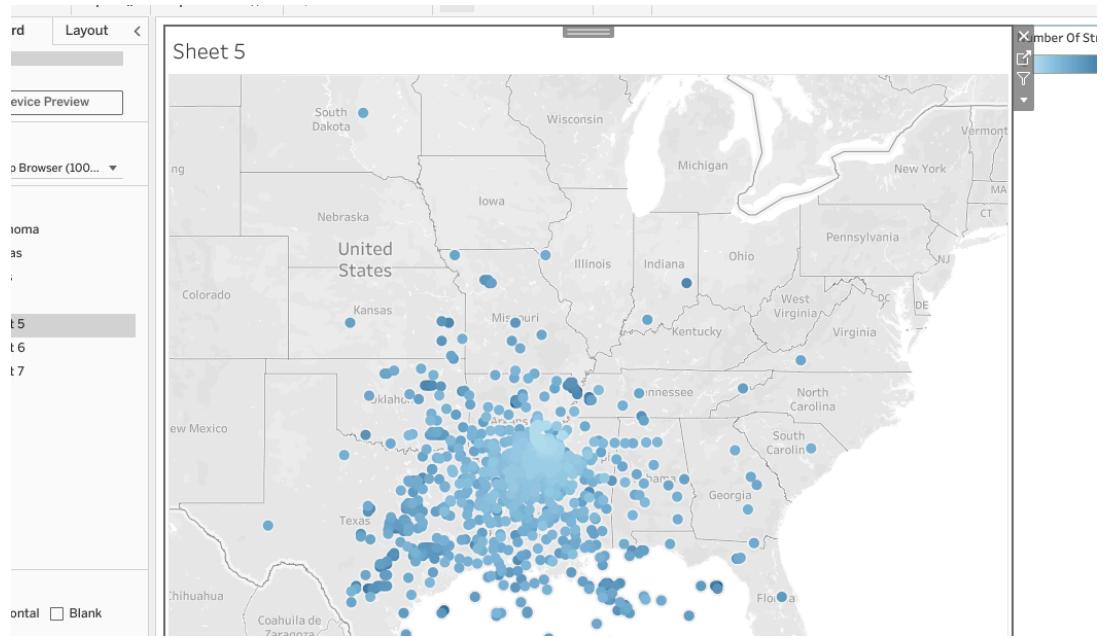
- Click on NEW WORKSHEET.
- Drag NUMBER of STRIKES to the TEXT square in the MARKS field.

The screenshot shows the Tableau interface. On the left, under 'Tables', there is a list of measures: Date, Measure Names, Number Of Strikes, X Coord, Y Coord, tableau_main_2009_to..., and Measure Values. 'Number Of Strikes' is highlighted with a green background. On the right, the 'Marks' shelf is open, showing options for Color, Size, Text, Detail, and Tooltip. The 'Text' option is selected.

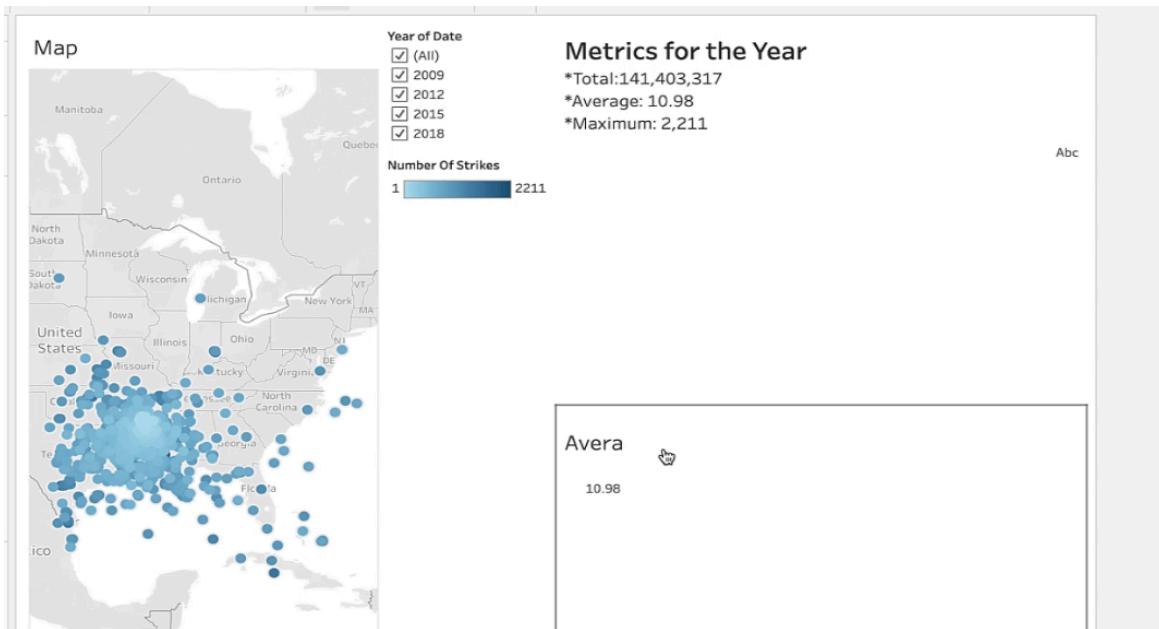
- From dropdown, select MEASURE and AVERAGE.

The screenshot shows a context menu for the 'AVG(Number Of Strikes)' measure. The 'Measure' option is selected. A sub-menu is open, showing various aggregation options: Sum, Average (which is checked), Median, Count, Count (Distinct), Minimum, Maximum, and Range. Other options like Dimension, Attribute, Discrete, Continuous, and Edit in Shelf are also visible in the main menu.

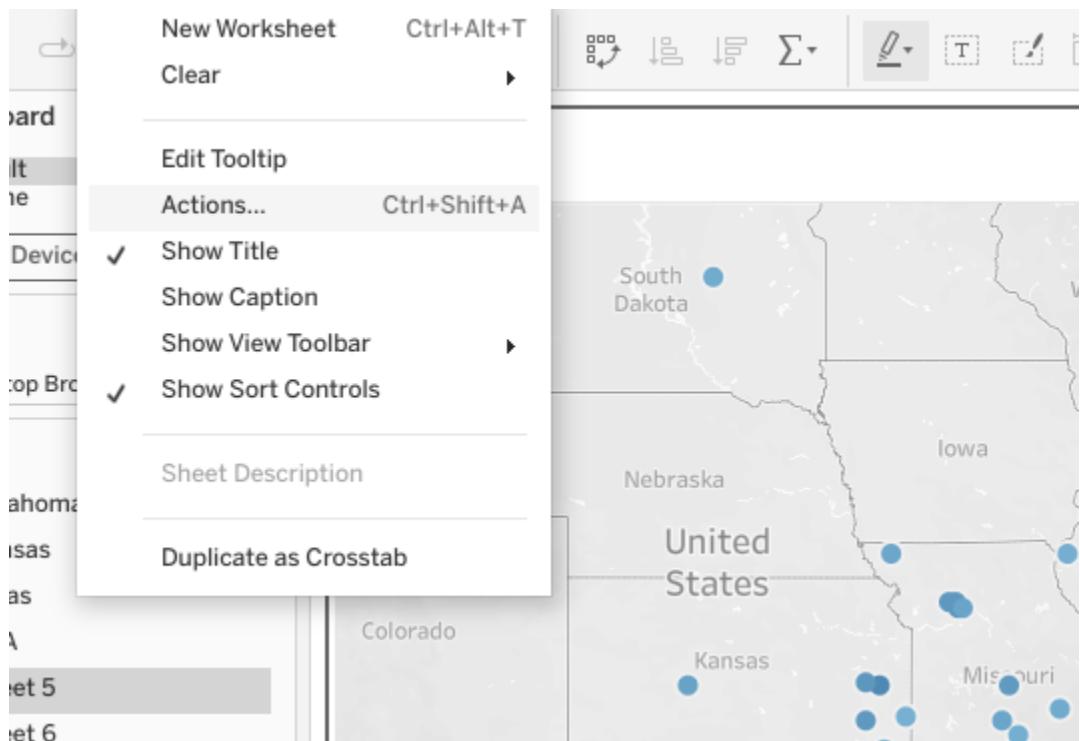
- Click on NEW DASHBOARD.
- Drag USA map worksheet to empty dashboard.



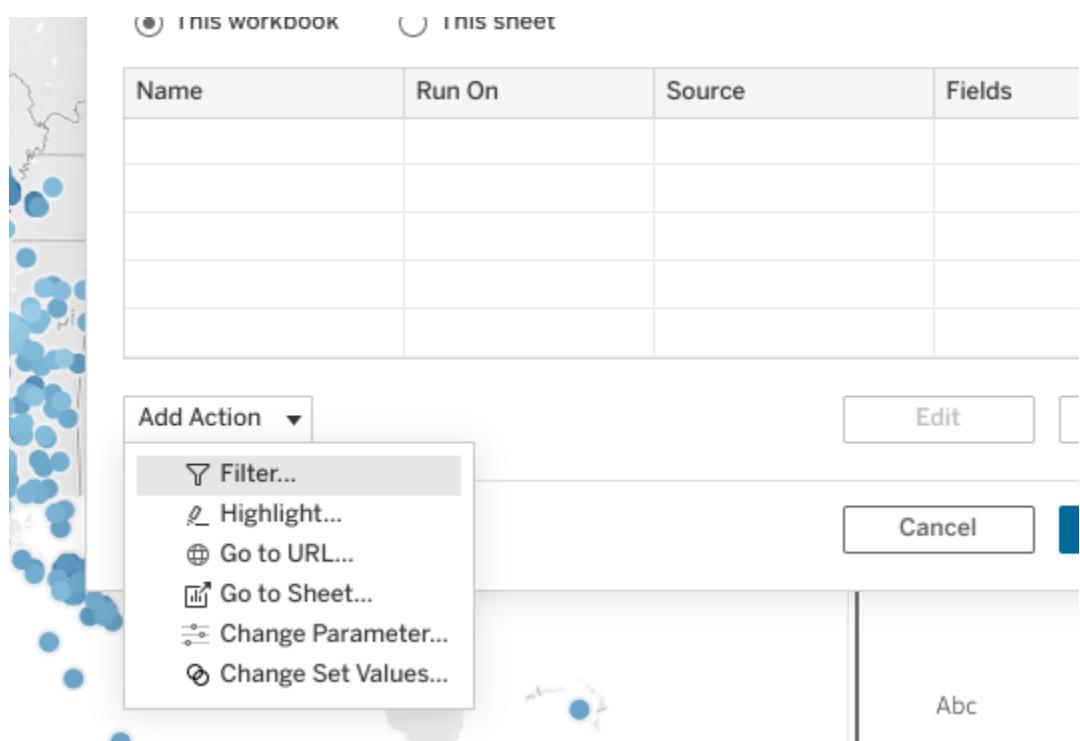
- Drag your other two worksheets to the dashboard.



- 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.

The screenshot shows the 'Source Sheets' section with 'Dashboard 3' selected. Under 'Run action on', 'Select' is chosen. In the 'Target Sheets' section, 'MAP' is selected. Under 'Clearing the selection will', 'Show all values' is chosen. A 'Filter' button is visible at the bottom.

- 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.

The screenshot shows the 'Target Sheets' section with 'Dashboard 3' selected. Under 'Clearing the selection will', 'Show all values' is chosen. Below, the 'Filter' section shows 'All fields' selected. A table below lists source and target fields:

	Source Field	Target Data Source	Target Field
<input type="checkbox"/>	Click to add		
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

- 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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