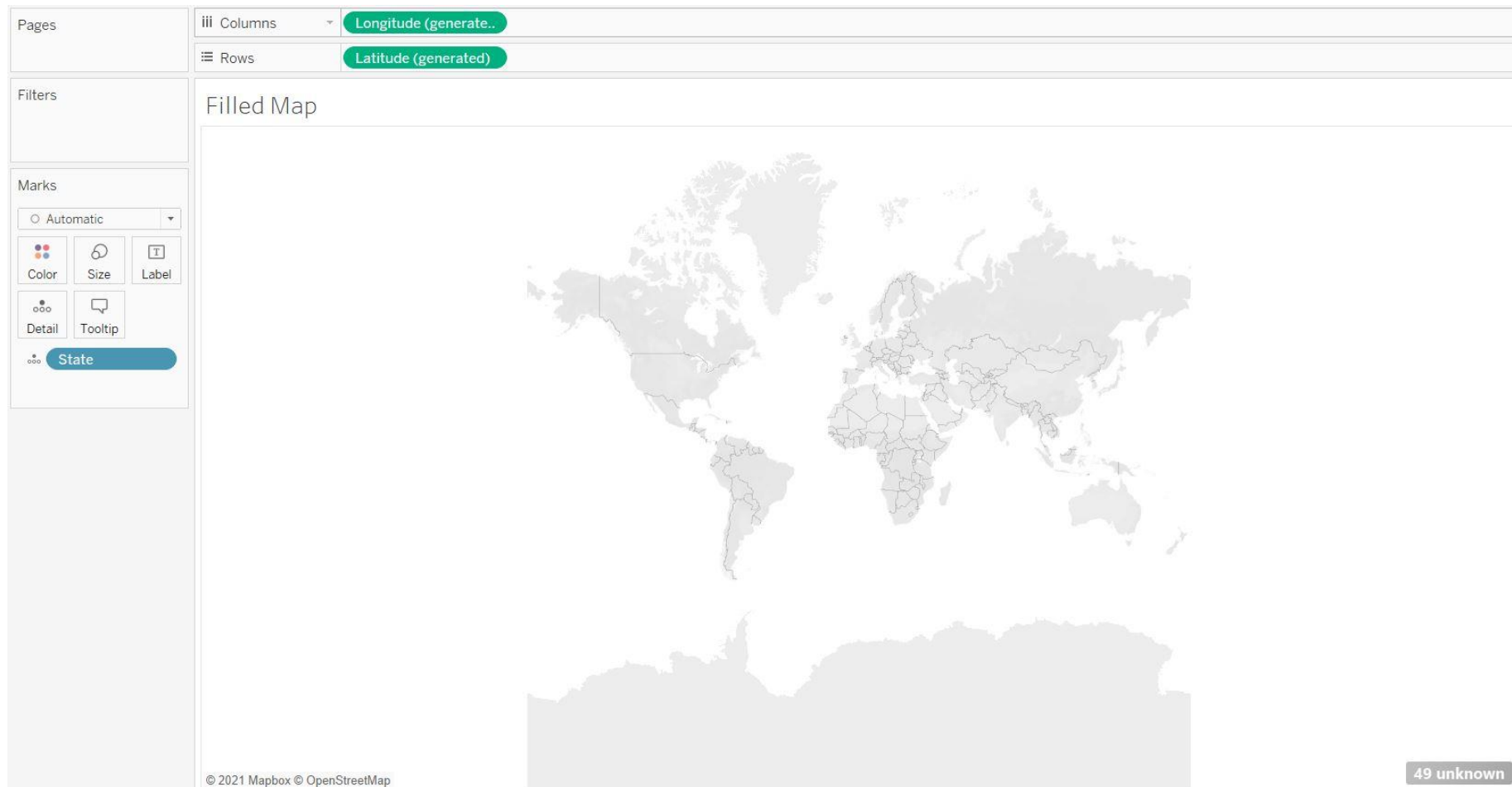


# STEPS FOR CREATING A SYMBOL MAP USING GEOGRAPHIC DATA

**STEP 1:** Drag and drop any Geographic field e.g.: **State** into the View area

In case you are in an area that is different from the country/area of the data source you will see a message like "**49 unknown**" at the bottom right-side corner of view area. Click on the unknown message



## STEP 2: A new window called like "Special Values for [State]" will open

Click on "**Edit Locations...**"

The screenshot displays a data visualization interface. On the left, there is a sidebar with sections: "Pages", "Filters", and "Marks". The "Marks" section includes a dropdown menu set to "Automatic" and buttons for "Color", "Size", "Label", "Detail", and "Tooltip". Below these is a button labeled "State". The main area is titled "Filled Map" and shows a world map. A modal dialog titled "Special Values for [State]" is open in the center. The dialog contains the following text: "There are 49 values that have unknown geographic locations. What do you want to do?". It offers three options: "Edit Locations..." (with the subtext "Correct the unknown locations."), "Filter data" (with the subtext "Exclude the special values from the view and calculations."), and "Show data at default position" (with the subtext "Show the special values at a default position on the axis. For example, Null values are shown at 0."). The dialog has a close button (X) in the top right corner. At the bottom left of the map area, there is a copyright notice: "© 2021 Mapbox © OpenStreetMap". At the bottom right, there is a badge that says "49 unknown".

Pages

Columns Longitude (generate..)

Rows Latitude (generated)

Filters

Marks

Automatic

Color Size Label

Detail Tooltip

State

Filled Map

Special Values for [State]

There are 49 values that have unknown geographic locations.  
What do you want to do?

**Edit Locations...**  
Correct the unknown locations.

**Filter data**  
Exclude the special values from the view and calculations.

**Show data at default position**  
Show the special values at a default position on the axis. For example, Null values are shown at 0.

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49 unknown

## STEP 3: A new window called like "Edit Locations" will open

The screenshot shows a web application interface with a sidebar on the left and a main map area. The sidebar contains sections for 'Pages', 'Filters', and 'Marks'. The 'Marks' section has a dropdown menu set to 'Automatic' and several buttons: 'Color', 'Size', 'Label', 'Detail', 'Tooltip', and a blue button labeled 'State'. The main map area is titled 'Filled Map' and shows a world map. Overlaid on the map is a dialog box titled 'Edit Locations'. The dialog box has a close button (X) in the top right corner. It contains the following sections:

- Geographic roles**:
  - Country/Region: Afghanistan
  - State/Province: State ⚠️ 49 issues
- Match values to locations**:
  - ⚠️ State/Province
  - Table with 2 columns: 'Your Data' and 'Matching Location'.

Your Data	Matching Location
Alabama	Unrecognized
Arizona	Unrecognized
Arkansas	Unrecognized
California	Unrecognized
Colorado	Unrecognized
Connecticut	Unrecognized

Below the table, there is a checkbox labeled 'Show only unmatched locations in drop down list' which is currently unchecked. At the bottom of the dialog box, there are three buttons: 'Reset Matches', 'OK', and 'Cancel'.

At the bottom left of the map area, there is a copyright notice: '© 2021 Mapbox © OpenStreetMap'. At the bottom right, there is a grey button labeled '49 unknown'.

## STEP 4: Click on the "Country/Region" field (near drop-down)

The screenshot shows the 'Edit Locations' dialog box. The 'Country/Region' field is set to 'Afghanistan'. The 'State/Province' field is set to 'None'. The 'Match values to location' section has 'Fixed' selected, with 'Afghanistan' in the dropdown. The '2-char codes' dropdown is set to 'ISO'. A table lists US states with 'Unrecognized' status. At the bottom, there are 'Reset Matches', 'OK', and 'Cancel' buttons.

Geographic roles

Country/Region: Afghanistan

State/Province: ☐ None

Match values to location: ☒ Fixed: Afghanistan

☐ From field: Country/Region

2-char codes: ISO

Alabama	Unrecognized
Arizona	Unrecognized
Arkansas	Unrecognized
California	Unrecognized
Colorado	Unrecognized
Connecticut	Unrecognized

☐ Show only unmatched locations in drop down list

Reset Matches OK Cancel

## STEP 5: Click on the "Fixed" field (near drop-down)

etMap

Edit Locations

Geographic roles

Country/Region: India

State/Province:

Match values to location:

☐ None

☒ Fixed:

☐ From field:

Search

Alabama

Arizona

Arkansas

California

Colorado

Connecticut

Afghanistan

Åland Islands

Albania

Algeria

American Samoa

Andorra

Angola

Anguilla

Antarctica

Antigua and Barbuda

Argentina

Armenia

Aruba

Australia

Austria

Azerbaijan

Bahrain

Bangladesh

Barbados

Belarus

Belgium

Belize

Benin

Bermuda

Reset Matches

Show only unmatched locations in dropdown

## STEP 6: Enter the correct country name e.g.: **United States**

Click on **OK**

Edit Locations

Geographic roles

Country/Region: India

State/Province: ☐ None

Match values to location: ☒ Fixed: ☐ From field:

State/Province

Alabama

Arizona

Arkansas

California

Colorado

Connecticut

Unrecognized

Unrecognized

Unrecognized

Unrecognized

☐ Show only unmatched locations in drop down list

Reset Matches

OK

Cancel

Edit Locations

Geographic roles

Country/Region: United States

State/Province: State

Match values to locations

State/Province	Matching Location
Alabama	Alabama
Arizona	Arizona
Arkansas	Arkansas
California	California
Colorado	Colorado
Connecticut	Connecticut

☐ Show only unmatched locations in drop down list

Reset Matches

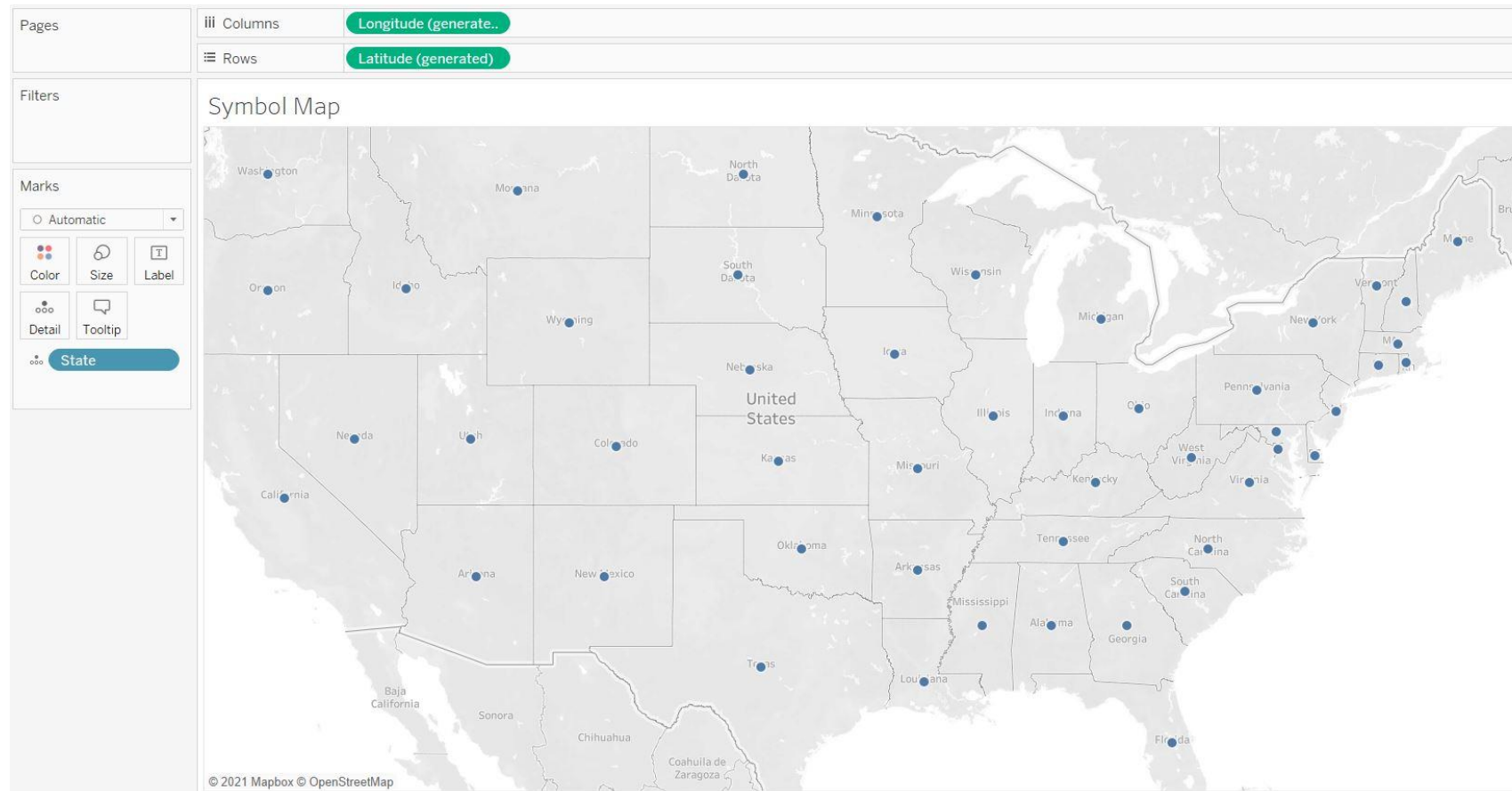
OK

Cancel

**STEP 7:** Now we must see the actual map of country in this case United States with the a circle representing a central point of each State.

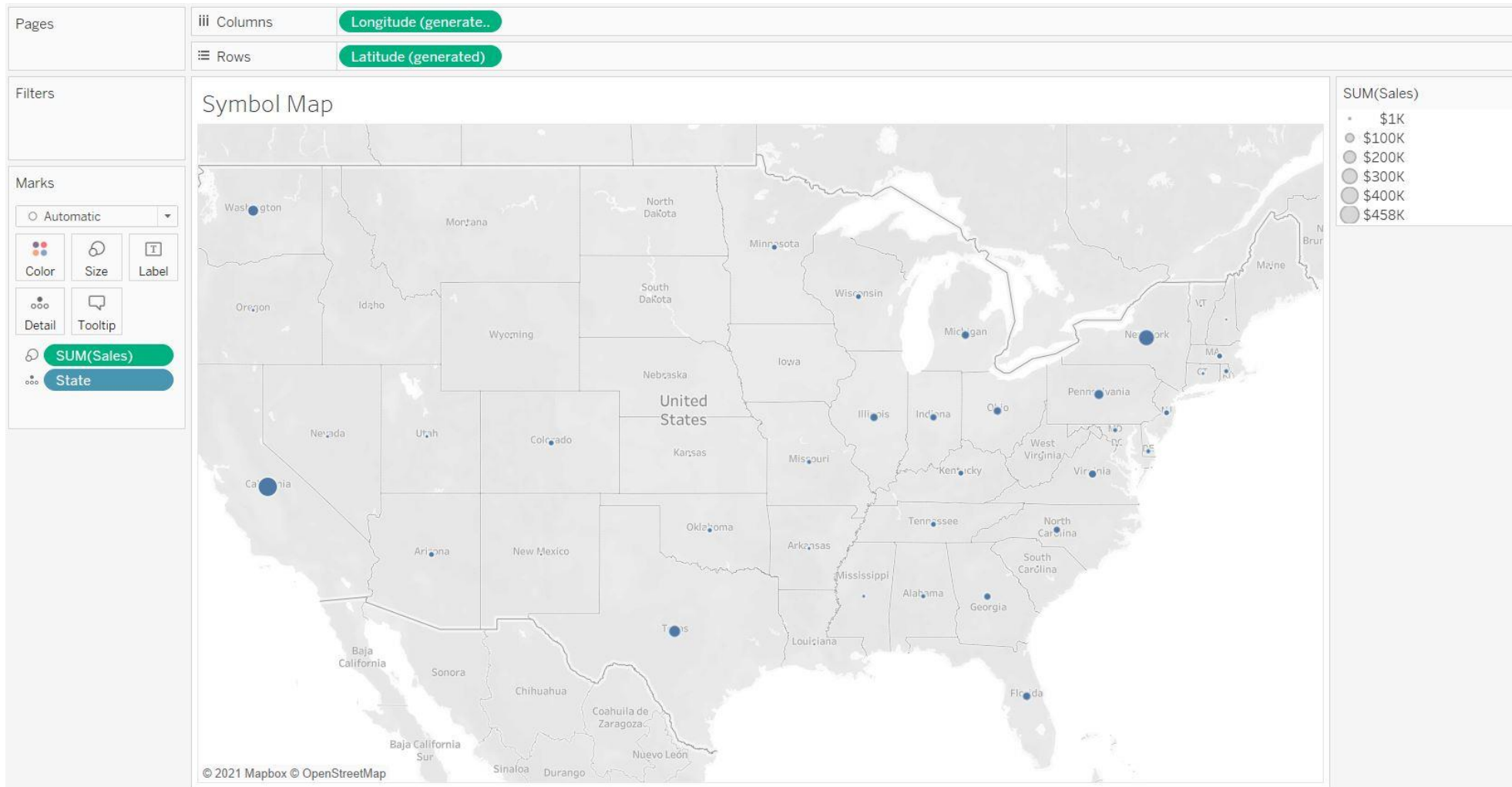
Whenever we bring a geographic field into the view area, Tableau compares the field with respect to its internal geo-coded database.

Based on the comparison a **Latitude** and **Longitude** are assigned on the map and the geographic field is assigned to the **Detail** section of the **Marks** card





**STEP 8:** Drag and drop any measure e.g.: **Sales** to the **Size** section of the **Marks** card.  
A Size legend will be present in the Top Right side of View Area.  
The bigger size represents the States with Higher Sales while the smaller size represents States with Lower Sales.



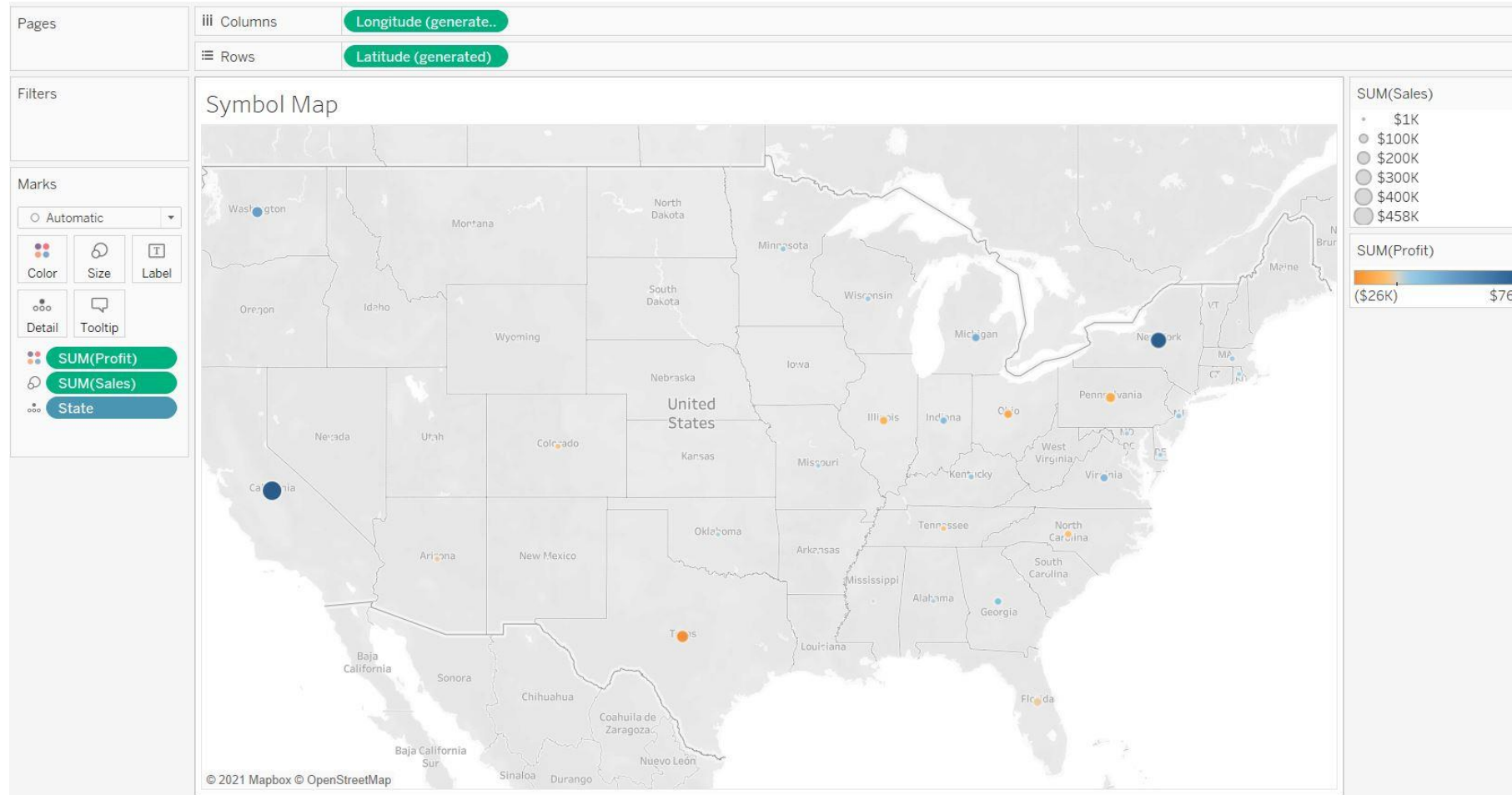


**STEP 9:** Drag and drop the second measure e.g.: **Profit** to the

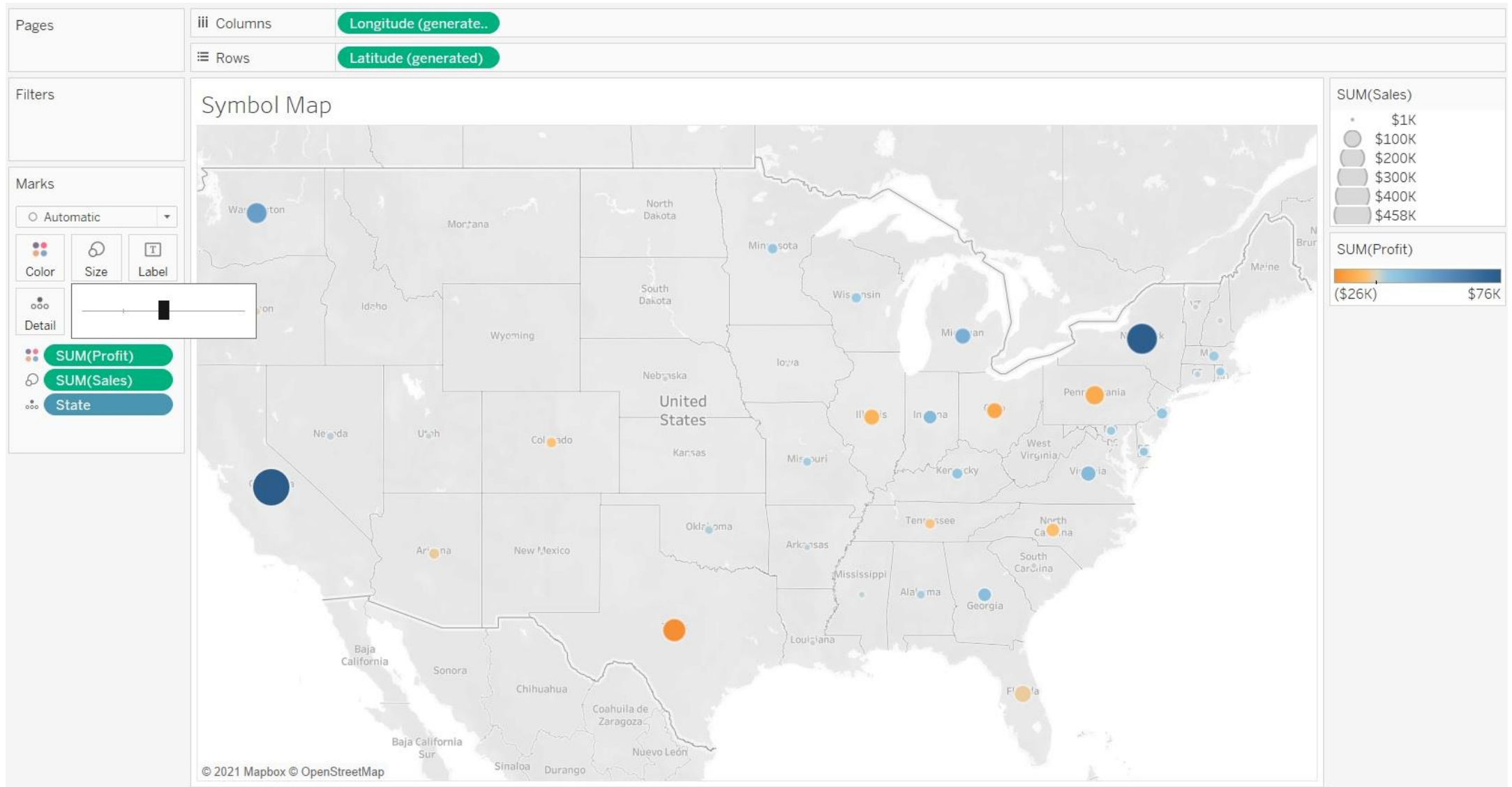
**Color** section of the **Marks** card

Observe that a Diverging color scale is applied for the **Profit**

The dark blue represents the States with Higher profits while dark orange color represents States with Lower Profits.

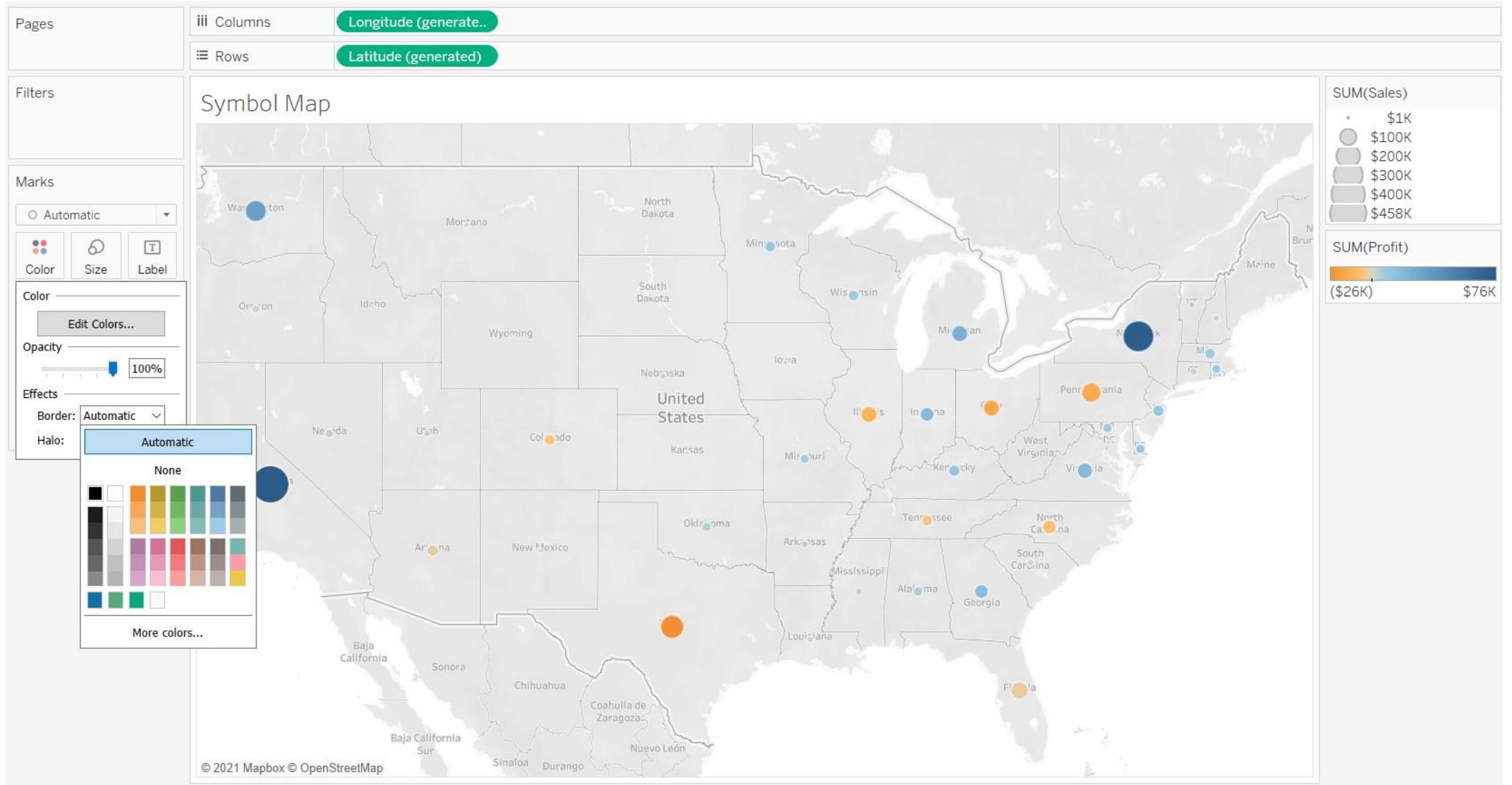


## STEP 10: Increase the size of the symbols by using the **Size** in **Marks** card

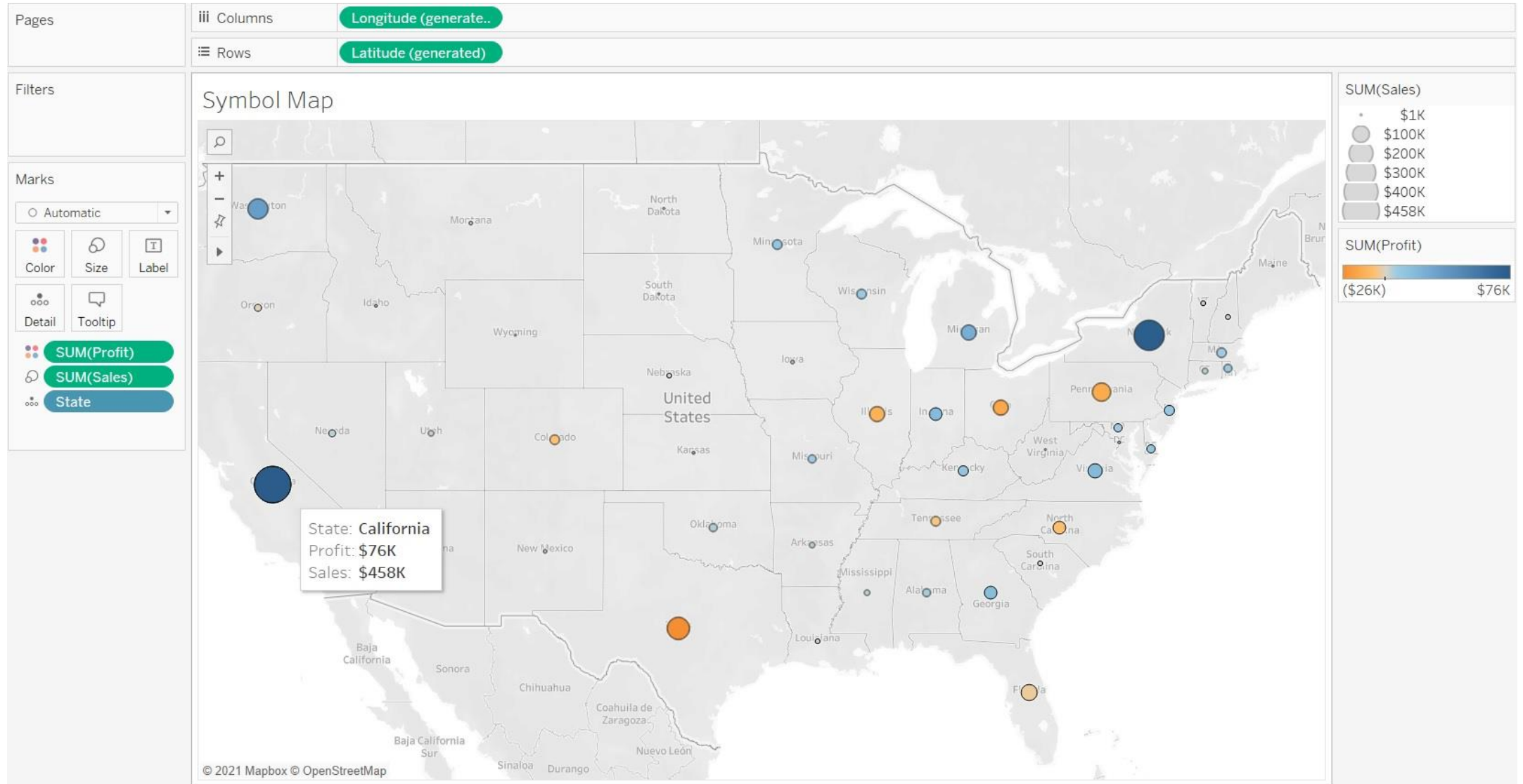


# STEP 11: Apply a border for the symbols by using **Color Marks** card

## Color --> Border

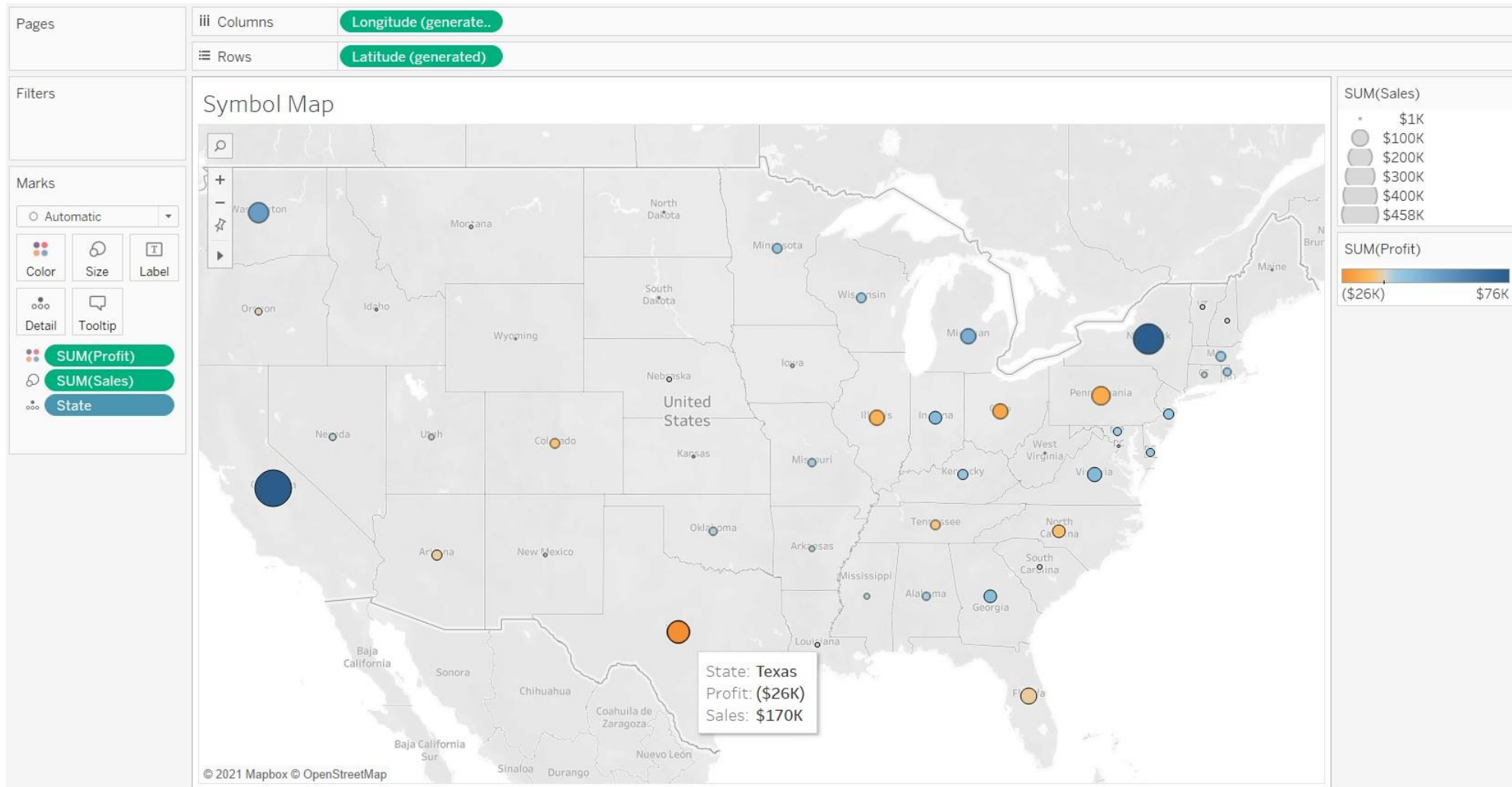


**STEP 12:** The State with largest circle and the darkest blue color has both highest Sales and highest Profit in this case it is **California** with **Sales of \$458K** and **Profit of \$76K**



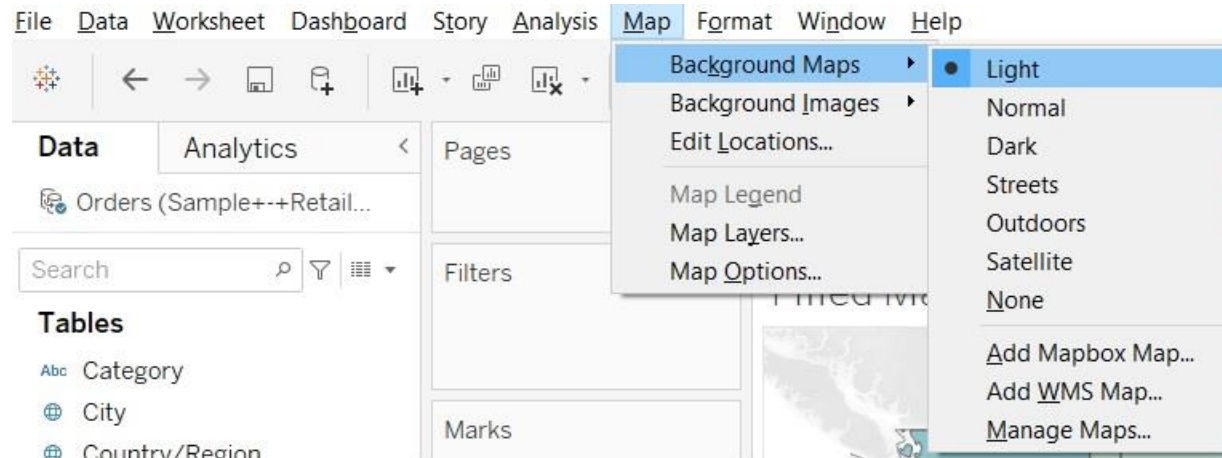
**STEP 13:** The State with smallest circle and the darkest orange color has both lowest Sales and lowest Profit in this case it is **Texas** with **Sales of \$170K** and **Profit of (\$26K)**

**NOTE:** The brackets refer to a negative value for Profit.





**STEP 14:** If required we can change the Background of the Map by selecting the required option using the **Map --> Background Maps**



**STEP 15:** If required we can change the Map Layers by first selecting the required option using the **Map --> Map Layers**  
In the "**Map Layers**" pane we can select or de-select the required options e.g.: Terrain, Coastline etc.

