

TABLEAU: Dashboards & Stories

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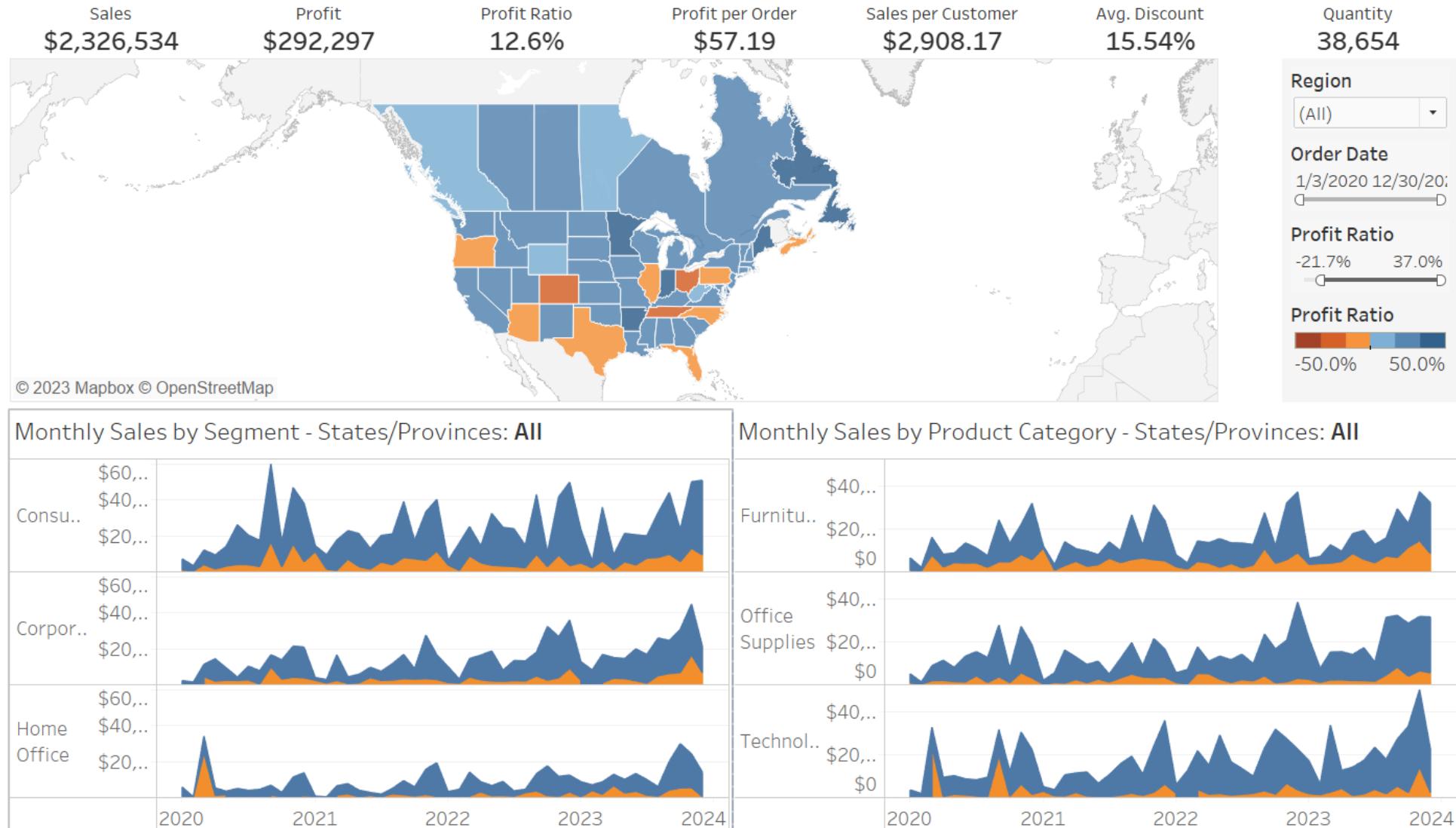
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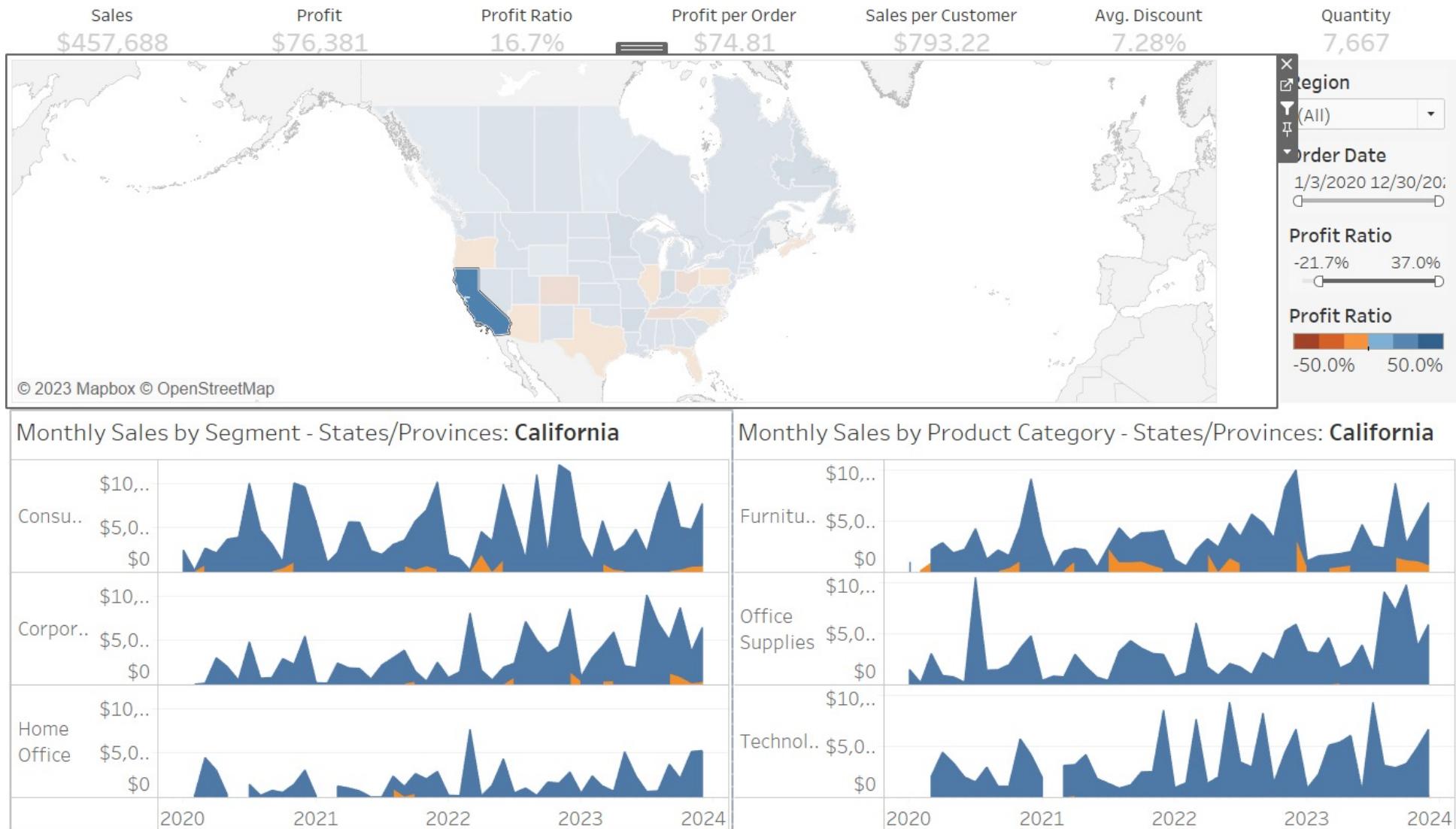
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TABLEAU DASHBOARDS

Executive Overview - Profitability (All)



Executive Overview - Profitability (California)



What are Tableau Dashboards?

A dashboard is **a collection** of several views, letting you compare a variety of data simultaneously.

It consolidates multiple visualizations and provide a comprehensive view of the data.

Enables users to gain insights at a glance and make data-driven decisions efficiently.

Building a Tableau Dashboard

Step 1: From the Start Page, connect to your data sources.

Once connected, it will open the Data Source page.

Step 2: Creating worksheets.

Use the drag-and-drop interface to select data fields and choose appropriate visualizations.

Select relevant charts and graphs based on the insights needed.

Step 3: Creating the dashboard and designing the layout.

Use a grid-based layout to align visualizations.

Step 4: Adding interactivity.

Interactive elements, such as filter actions, highlight actions, parameters.

Step 5: Change the view visually

Change color schemes, fonts, borders, and backgrounds.

Step I: The Start Page: Connect to data sources

Tableau - Music Sales

Open a Workbook

Training

Getting Started

Connecting to Data

Visual Analytics

Understanding Tableau

More training videos...

Resources

Get Tableau Prep

Blog - Read latest post

The NEW Community Forums

Sample data for Relationships

Find your learning path

Answer a few questions and get a personalized path to success. →

Take the quiz

Update to 2020.4.1 Now

Discover

More Samples

Sample Workbooks

Superstore

Regional

World Indicators

Music Sales

Superstore

Executive Overview - Profitability (us)

Monthly Sales by Segment: Stores

Monthly Sales by Product

Oceania \$73

Asia \$211

South America

North America

Europe

Connect

Search for Data

Tableau Server

To a File

Microsoft Excel

Text file

JSON file

PDF file

Spatial file

Statistical file

More...

To a Server

Microsoft SQL Server

Oracle

Amazon Redshift

MySQL

More...

Saved Data Sources

Sample - Superstore

World Indicators

Step I: The Start Page: Connect to data sources

File Data Server Window Help

Connections Add

data_connection_practice Microsoft Excel

Sheets

Use Data Interpreter
Data Interpreter might be able to clean your Microsoft Excel workbook.

Orders People Returns New Union

Orders (data_connection_practice)

Drag tables here

Data Source Sheet 1

Step I: The Start Page: Connect to data sources

Tableau - Book1

File Data Server Window Help

Connections Add

Connections

data_connection_practice Microsoft Excel

Sheets

Use Data Interpreter
Data Interpreter might be able to clean your Microsoft Excel workbook.

Orders People Returns

New Union

Orders (data_connection_practice)

Connection Live Extract Filters 0 | Add

Orders

People

Returns

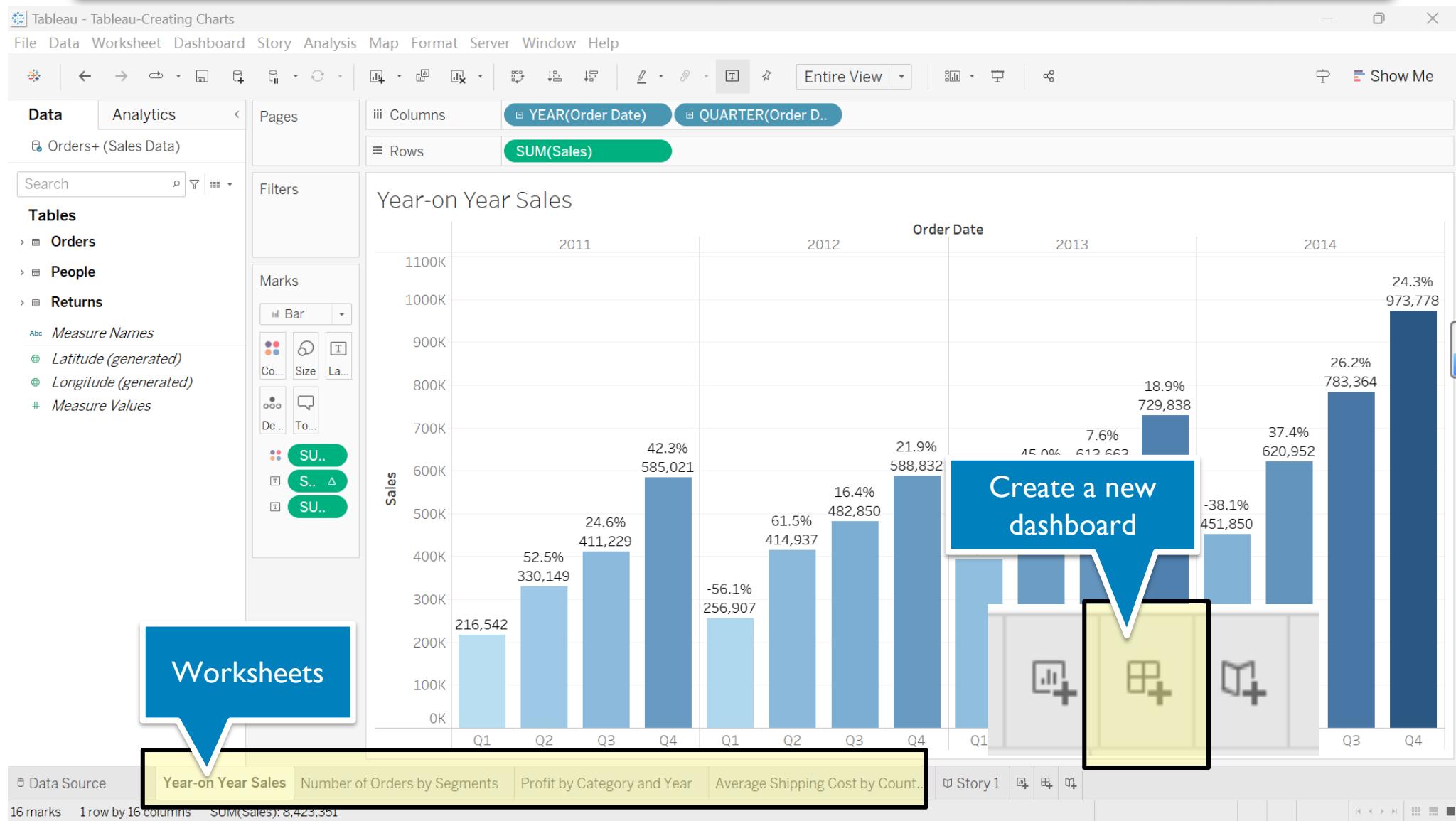
Orders 24 fields 34194 rows 100 rows

Table Details

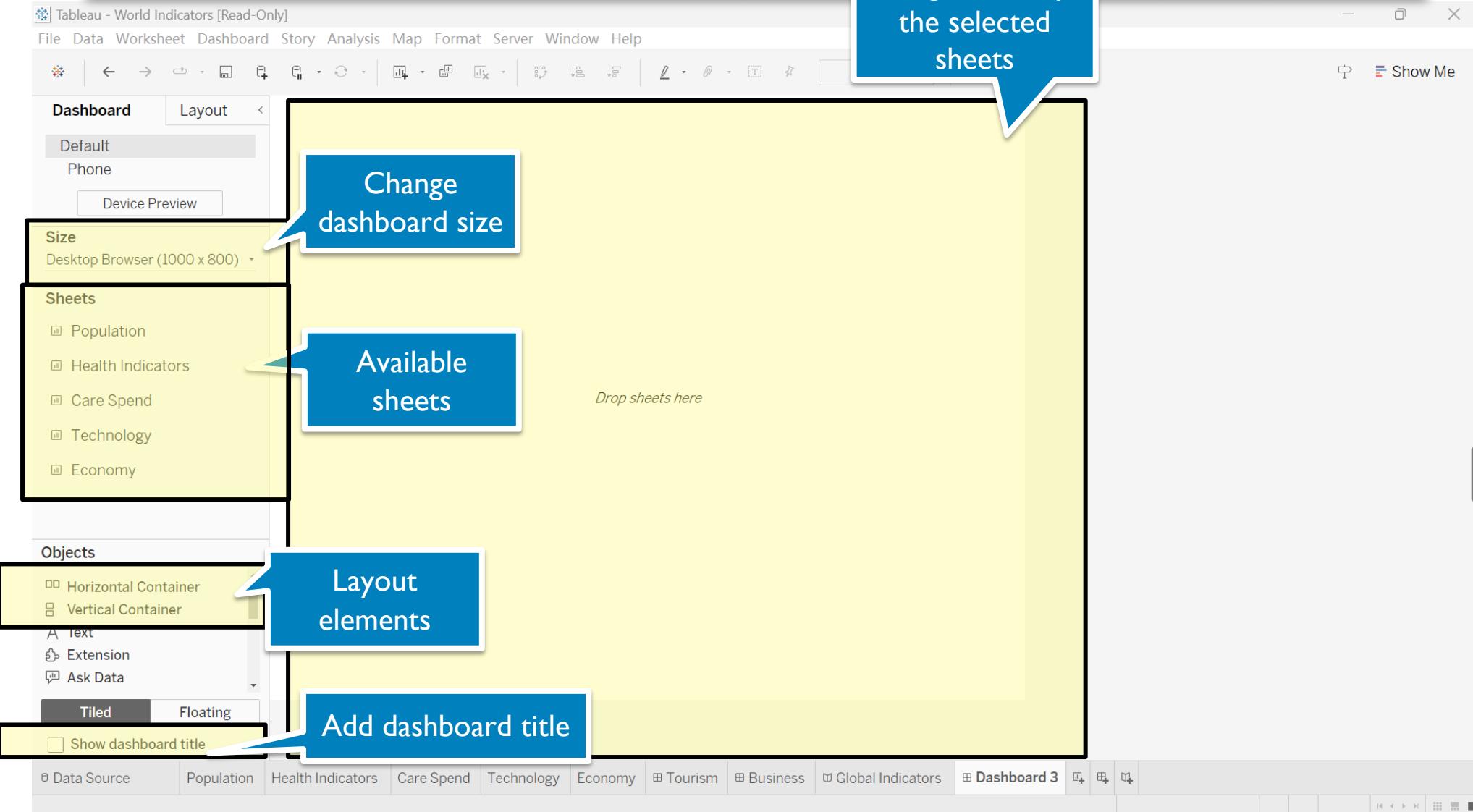
#	Abc Orders	Orders	Abc Orders	Abc Orders	Abc Orders	Abc Orders	Abc Orders	Abc Orders	Orders
Row	Order ID	Order Date	Ship Date	Ship Mode	Customer ID	Customer Name	Segment	City	
1	MX-2014-143658	2014/10/2	2014/10/6	Standard Class	SC-20575	Sonia Cooley	Consumer	Mexico	
2	MX-2012-155047	2012/10/15	2012/10/20	Standard Class	KW-16570	Kelly Williams	Consumer	Dos Qu	
4	MX-2012-155047	2012/10/15	2012/10/20	Standard Class	KW-16570	Kelly Williams	Consumer	Dos Qu	
5	MX-2012-155047	2012/10/15	2012/10/20	Standard Class	KW-16570	Kelly Williams	Consumer	Dos Qu	
7	MX-2013-134096	2013/9/27	2013/10/1	Standard Class	DP-13000	Darren Powers	Consumer	São Pa	

Data Source Sheet 1

Step 2: Create Worksheets



Step 3: Create a Dashboard



Step 3: Create a Dashboard

Tableau - Tableau-Creating Charts

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Dashboard Layout

Sales & Profit

Default Phone Device Preview

Size Desktop Browser (1000 x 800)

Sheets

- Year-on Year ...
- Number of Order...
- Profit by Catego...
- Average Shippin...

Objects

- Horizontal Container
- Vertical Container
- Text
- Extension
- Ask Data

Tiled Floating

Show dashboard title

Dashboard title

Drag and drop selected worksheets

Profit by Category and Year

Category	Sub-Category	2011				2012				2013				2014			
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Furniture	Bookcases	###	###	###	23	###	###	###	###	###	###	###	###	###	###	###	
	Chairs	###	###	###	-284	###	###	###	###	###	###	###	###	###	###	###	
	Furnishings	730	75	###	###	###	###	###	###	###	###	###	###	###	###	###	
	Tables	###	###	###	-329	###	###	###	###	###	###	###	###	###	###	###	
Office Supplies	Appliances	###	###	###	###	###	###	###	###	###	###	###	###	###	###	###	
	Art	###	###	###	599	###	###	###	###	###	###	###	###	###	###	###	
	Binders	###	###	###	###	###	###	###	###	###	###	###	###	###	###	485	
	Envelopes	206	831	###	570	368	###	###	###	935	###	###	###	944	###	###	
	Fasteners	201	360	502	293	341	513	477	503	45	205	576	899	337	736	459	
	Lables	202	517	572	760	445	582	411	620	204	170	900	875	506	604	340	

Year-on Year Sales

Order Date	2011	2012	2013	2014
Q1	216,542	256,907	393,177	451,850
Q2	330,149	414,937	570,263	620,932
Q3	411,229	482,850	613,663	783,364
Q4	585,021	588,832	729,838	973,778

Data Source Year-on Year Sales Number of Orders by Segments Profit by Category and Year Average Shipping Cost by Count... Story 1 Dashboard 1

Step 3: Create a Dashboard

Title format

The screenshot shows the Tableau software interface. At the top, there's a menu bar with options like File, Data, Worksheet, Dashboard, Story, Analysis, Map, Format, Server, Window. Below the menu is a toolbar with various icons. A blue callout bubble labeled "Title format" points to the title bar of a chart window which says "Sales & Profit". To the left, a sidebar titled "Dashboard size" contains sections for "Size" (set to "Automatic") and "Sheets" (listing "Year-on Year ...", "Number of Order...", "Profit by Catego...", "Average Shippin..."). Below that is an "Objects" section with items like "Horizontal Container", "Vertical Container", "Text", "Extension", "Ask Data", "Tiled" (selected), and "Floating". A blue callout bubble labeled "Floating legend" points to a floating legend window. This window has tabs for "Edit Colors..." and "Format Legends...". Under "Format Legends...", there's a "Title" tab with "Edit Title..." and "Layout" (which has "Add Show/Hide Button", "Floating" selected, and "Floating Order" also listed). Other tabs include "Deselect", "Remove from Dashboard", and "Rename Dashboard Item...". The main workspace contains two charts: "Profit by Category and Year" (a heatmap) and "Year-on Year Sales" (a bar chart). The bottom navigation bar includes "Data Source", "Year-on Year Sales", "Number of Orders by Segments", "Profit by Category and Year", "Average Shipping Cost by Count...", "Story 1", and "Dashboard 1".

Dashboard size

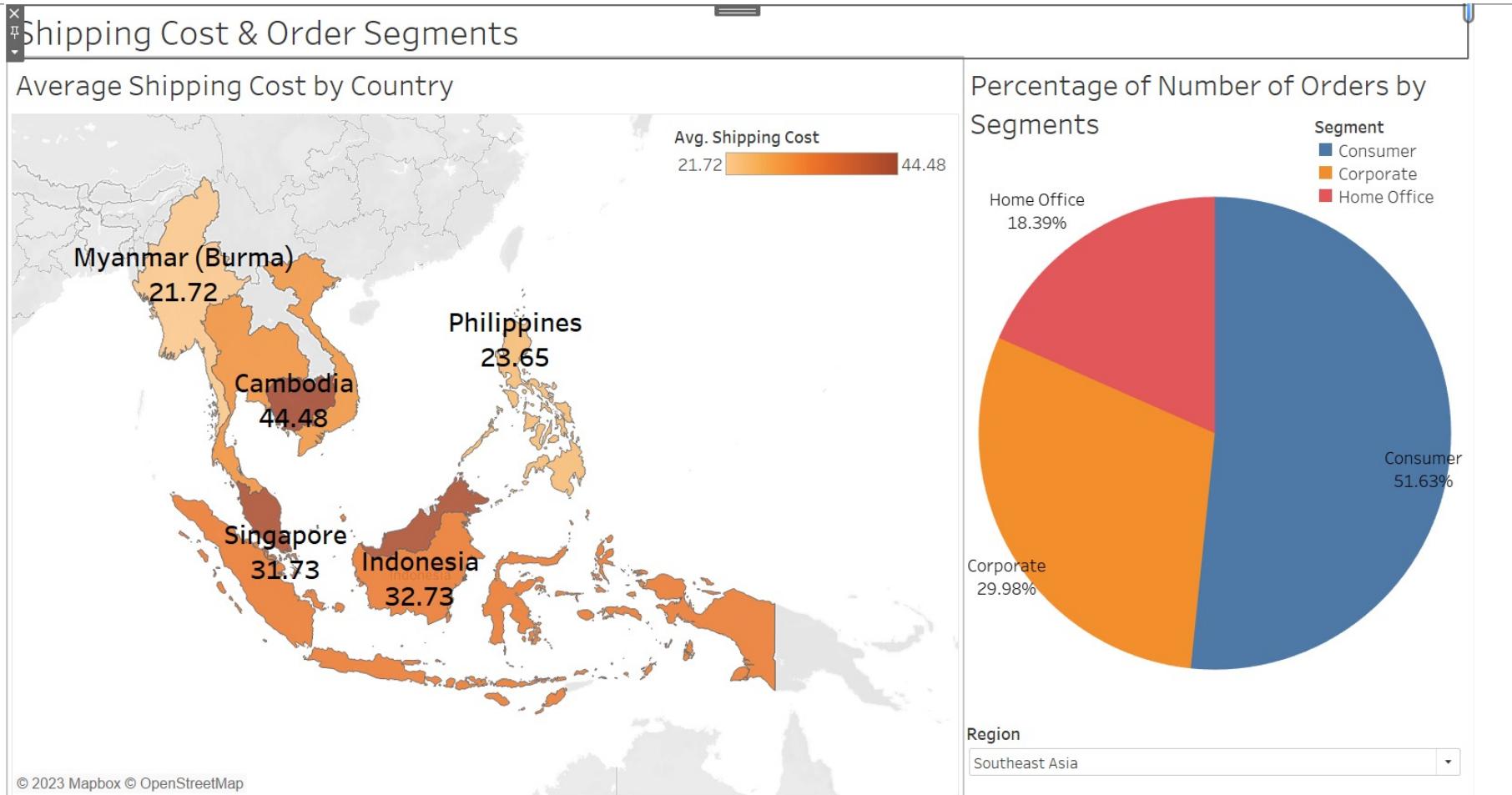
Floating legend

PRACTICE (10 MINS): CREATE A DASHBOARD

Objectives

1. Open “Tableau-CreatingCharts.twb”
2. Recreate the Dashboard:
 - Size
 - Containers
 - Floating legends
 - Single-value drop down filter

Objectives



Step 4: Add Interactivity – Filter Action

Tableau - Tableau-Creating Charts

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Fit Width Show Me

Dashboard Layout

Default Phone Device Preview

Size Automatic

Sheets

- Year-on Year ...
- Number of Order...
- Profit by Catego...
- Average Shippin...

Objects

- Horizontal Container
- Vertical Container
- Text
- Extension
- Ask Data

Tiled Floating

Show dashboard title

Sales & Profit

Profit by Category and Year

Order Date

Category	Sub-Category	2011				2012				2013				2014			
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Furniture	Bookcases	2,658	3,846	4,989	9,645	23	6,328	3,777	7,662	7,336	6,268	7,252	10,396	3,655	10,206	17,047	11,373
	Chairs	2,003	3,708	3,358	10,527	-284	5,163	5,898	6,700	3,840	6,538	8,943	9,775	8,364	4,155	5,389	12,479
	Furnishings	730	75	2,073	1,678	1,012	1,956	2,328	1,982	1,086	1,040	2,420	4,171	2,378	2,250	4,040	1,715
	Tables	-2,029	-2,643	-1,300	-329	-1,710	-1,360	1,153	-6,051	1,845	-3,838	-2,152	-5,870	-4,460	-7,491	-1,662	10,171
Office Supplies	Appliances	2,272	5,887	5,433	4,132	1,440	4,766	6,616	3,721	5,087	11,406	7,068	11,174	5,443	5,941	7,215	11,501
	Art	1,029	2,298	2,000	2,191	599	1,509	2,573	3,313	1,569	2,303	2,482	3,098	2,112	3,163	4,790	3,956
	Binders	1,131	2,910	3,512	1,030	1,570	5,233	2,337	1,045	3,172	2,267	2,008	11,112	3,139	5,529	7,169	485
	Envelopes	206	831	1,374	570	368	1,204	1,203	1,751	1,164	935	2,829	1,599	1,200	944	1,285	2,201
	Fasteners	201	360	502	293	341	513	477	503	45	205	576	899	337	736	459	791
	Labels	292	517	573	768	445	582	411	630	294	478	800	875	596	804	1,481	849
	Paper	865	1,222	2,206	3,249	961	675	1,892	3,216	2,024	3,580	3,075	3,256	2,243	2,552	3,717	5,274
	Storage	2,063	481	2,252	5,209	4,237	3,958	1,805	2,615	3,082	3,305	6,468	7,965	3,838	5,396	8,313	7,937
	Supplies	576	762	791	787	176	727	975	1,575	1,003	633	1,389	959	288	992	965	1,827
Technology	Accessories	1,207	3,152	1,445	3,969	3,176	5,192	5,973	6,481	3,463	5,116	6,913	9,561	2,743	6,095	10,420	8,024
	Copiers	376	4,952	5,045	10,743	5,910	12,834	6,344	9,978	5,835	10,441	11,148	23,707	9,213	11,629	18,004	23,638
	Machines	365	764	-1,257	3,995	1,171	2,275	5,788	133	4,983	4,380	3,214	-203	2,430	2,698	3,839	6,265
	Phones	3,819	9,314	8,373	11,310	4,412	6,337	6,401	10,081	4,715	15,955	4,947	12,608	6,918	10,770	6,961	16,319

Year-on Year Sales

Order Date

Sales	2011				2012				2013				2014			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
5,385	74.2%	37.6%	-1.6%	-20.5%	38.5%	-1.0%	24.6%	-37.7%	48.1%	47.9%	10.2%	-47.4%	28.0%	47.7%	7.2%	
9,378	9,378	12,904	12,702	10,095	13,979	13,842	17,253	10,745	15,912	23,541	25,943	13,646	17,463	25,794	27,662	
0K	20K	40K	0K	20K	40K	0K	20K	0K	20K	40K	0K	20K	40K	0K	20K	
Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	

Data Source Year-on Year Sales Number of Orders by Segments Profit by Category and Year Average Shipping Cost by Count... Story 1 Dashboard 1

16 of 272 marks 17 rows by 16 columns SUM(Profit): 30,934

Step 4: Add Interactivity – Filter Action

The screenshot shows the Tableau interface with a context menu open over a dashboard item. The menu options include:

- New Dashboard
- Device Layouts
- Show Grid
- Grid Options...
- Format
- Copy Selected Dashboard Item
- Copy Image
- Export Image...
- Clear
- Show Title
- Actions...** (highlighted with a black box)
- Auto Update
- Run Update
- Add Phone Layouts to Existing Dashboards
- Add Phone Layouts to New Dashboards

The "Actions..." option is highlighted with a black box. A blue callout box labeled "Filter Action" points to the "Filter..." option in the Actions dialog box.

The Actions dialog box contains the following text and options:

Actions let you create interactive relationships between data, dashboard objects, other worksheets, and the web.

Show actions for

This workbook This sheet

Name:

Fields:

Filter Action

Filter... (highlighted with a yellow box)

Highlight...

Go to URL...

Go to Sheet...

Change Parameter...

Change Set Values...

Add Action ▾

Edit Remove Cancel OK

The main dashboard view shows a bar chart titled "Year-on Year Sales" for the year 2011. The chart displays sales percentages for each quarter: Q1 (74.2%), Q2 (37.6%), Q3 (-1.6%), Q4 (-20.5%). Below the chart is a table titled "Technology" showing sales for Accessories, Copiers, Machines, and Phones.

Dashboard navigation and status information at the bottom:

- Data Source: Year-on Year Sales
- Number of Orders by Segments
- Profit by Category and Year
- Average Shipping Cost by Count...
- Story 1
- Dashboard 1
- 16 of 272 marks
- 17 rows by 16 columns
- SUM(Profit): 30,934

Step 4: Add Interactivity – Filter Action

The screenshot illustrates the process of creating a filter action in Tableau. On the left, a dashboard titled "Profit by Category and Year" is displayed, featuring a bar chart and a table. The dashboard includes filters for "Category" and "Sub-Category". A callout labeled "Source sheet" points to the "Category" filter dropdown. The "Edit Filter Action" dialog is open in the center, showing a "Source Sheets" section where "Profit by Category and Year" is selected. The "Run action on" section has "Select" highlighted. A callout labeled "Target sheet" points to the "Target Sheets" section, which contains "Year-on Year Sales". The "Filter" section is set to "All fields". The "OK" button at the bottom right of the dialog is highlighted.

Edit Filter Action

Name: Product Category Filter

Source Sheets: Profit by Category and Year

Run action on: Select

Target Sheets: Year-on Year Sales

Filter: All fields

OK

Cancel

Source sheet

Target sheet

Dashboard

Default Phone

Device Preview

Size Automatic

Sheets

- Year-on Year ...
- Number of Order...
- Profit by Catego...
- Average Shippin...

Objects

- Horizontal Container
- Vertical Container
- Text
- Extension
- Ask Data

Tiled Floating

Show dashboard title

Data Source Year-on Year Sales Number of

16 of 272 marks 17 rows by 16 columns SUM(Profit): 30,934

Profit -10,171 23,707

	Q4	Q1	Q2	Q3	2014
62	10,396	3,655	10,206	17,047	11,373
43	9,775	8,364	4,155	5,389	12,479
20	4,171	2,378	2,250	4,040	1,715
52	-5,870	-4,460	-7,491	-1,662	-10,171
68	11,174	5,443	5,941	7,215	11,501
82	3,098	2,112	3,163	4,790	3,956
08	11,112	3,139	5,529	7,169	485
29	1,599	1,200	944	1,285	2,201
76	899	337	736	459	791
00	875	596	804	1,481	849
75	3,256	2,243	2,552	3,717	5,274
68	7,965	3,838	5,396	8,313	7,937
89	959	288	992	965	1,827
13	9,561	2,743	6,095	10,420	8,024
48	23,707	9,213	11,629	18,004	23,638
14	-203	2,430	2,698	3,839	6,265
47	12,608	6,918	10,770	6,961	16,319

Sales 5,385 27,662

	Q4	Q1	Q2	Q3	2014
0.2%	5,943	-47.4%	28.0%	47.7%	7.2%
	13,646	17,463	25,794	27,662	

PRACTICE (10 MINS): FILTER ACTIONS

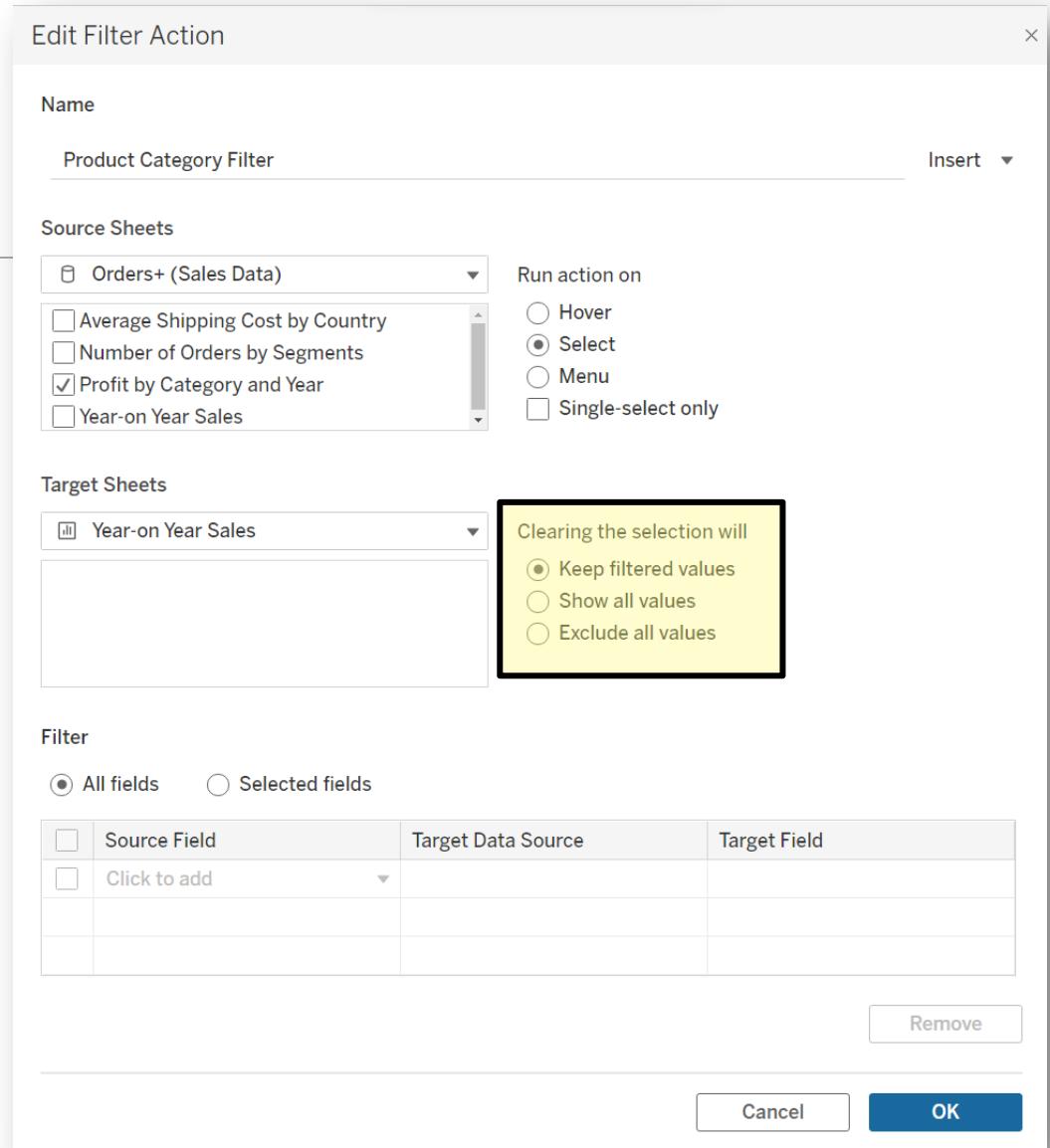
Objectives

1. Add a filter action:

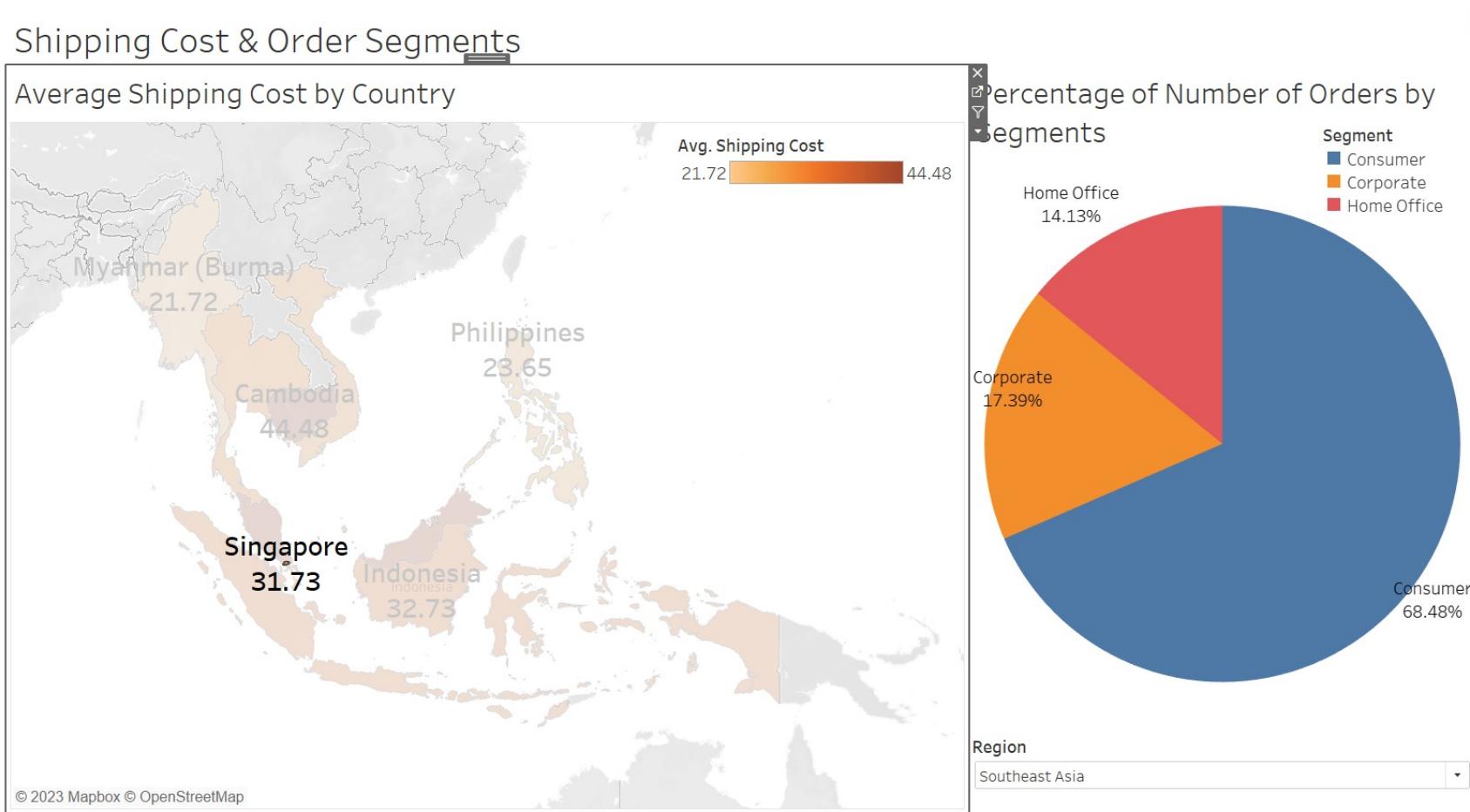
- **Source sheet:** map chart
- **Target sheet:** pie chart
- Delete pie chart in the Tooltip of Map chart

2. Play with different selections:

- Keeping filtered values
- Show all values
- Exclude all values



Objectives



Step 4: Add Interactivity – Highlight Action

Tableau - Tableau-Creating Charts

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Entire View Show Me

Dashboard Layout

Sales & Profit

Profit by Category and Year

Order Date

Category	Sub-Category	2011				2012				2013				2014			
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Furniture	Bookcases	2,658	3,846	4,989	9,645	23	6,328	3,777	7,662	7,336	6,268	7,252	10,396	3,655	10,206	17,047	11,373
	Chairs	2,003	3,708	3,358	10,527	-284	5,163	5,898	6,700	3,840	6,538	8,943	9,775	8,364	4,155	5,389	12,479
	Furnishings	730	75	2,073	1,678	1,012	1,956	2,328	1,982	1,086	1,040	2,420	4,171	2,378	2,250	4,040	1,715
	Tables	-2,029	-2,643	-1,300	-329	-1,710	-1,360	1,153	-6,051	1,845	-3,838	-2,152	-5,870	-4,460	-7,491	-1,662	-10,171
Office Supplies	Appliances	2,272	5,887	5,433	4,132	1,440	4,766	6,616	3,721	5,087	11,406	7,068	11,174	5,443	5,941	7,215	11,501
	Art	1,029	2,298	2,000	2,191	599	1,509	2,573	3,313	1,569	2,303	2,482	3,098	2,112	3,163	4,790	3,956
	Binders	1,131	2,910	3,512	1,030	1,570	5,233	2,337	1,045	3,172	2,267	2,008	11,112	3,139	5,529	7,169	485
	Envelopes	206	831	1,374	570	368	1,204	1,203	1,751	1,164	935	2,829	1,599	1,200	944	1,285	2,201
	Fasteners	201	360	502	293	341	513	477	503	45	205	576	899	337	736	459	791
	Labels	292	517	573	768	445	582	411	630	294	478	800	875	596	804	1,481	849
	Paper	865	1,222	2,206	3,249	961	675	1,892	3,216	2,024	3,580	3,075	3,256	2,243	2,552	3,717	5,274
	Storage	2,063	481	2,252	5,209	4,237	3,958	1,805	2,615	3,082	3,305	6,468	7,965	3,838	5,396	8,313	7,937
	Supplies	576	762	791	787	176	727	975	1,575	1,003	633	1,389	959	288	992	965	1,827
Technology	Accessories	1,207	3,152	1,445	3,969	3,176	5,192	5,973	6,481	3,463	5,116	6,913	9,561	2,743	6,095	10,420	8,024
	Copiers	376	4,952	5,045	10,743	5,910	12,834	6,344	9,978	5,835	10,441	11,148	23,707	9,213	11,629	18,004	23,638
	Machines	365	764	-1,257	3,995	1,171	2,275	5,788	133	4,983	4,380	3,214	-203	2,430	2,698	3,839	6,265
	Phones	3,819	9,314	8,373	11,310	4,412	6,337	6,401	10,081	4,715	15,955	4,947	12,608	6,918	10,770	6,961	16,319
	/year-on Year Sales																
Sales	2011				2012				2013				2014				
	1.5M	1M	0.5M	0	1.5M	1M	0.5M	0	1.5M	1M	0.5M	0	1.5M	1M	0.5M	0	
216,542	330,149	411,229	585,021	52.5%	24.6%	42.3%	0	-56.1%	61.5%	16.4%	21.9%	-33.2%	45.0%	7.6%	18.9%	24.3%	
216,542	256,907	414,937	482,850	0	256,907	414,937	482,850	0	393,177	570,263	613,663	729,838	451,850	620,952	783,364	973,778	
216,542	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	

Step 4: Add Interactivity – Highlight Action

The screenshot shows the Tableau interface with the following details:

- Top Bar:** Tableau - Tableau-Creating Charts, File, Data, Worksheet, Dashboard, Story, Analysis, Map, Format, Server, Window, Help.
- Left Sidebar:** Dashboard (Default, Phone, Device Preview), Size (Automatic), Sheets (Year-on Year Sales, Number of Orders, Profit by Category, Average Shipping Cost), Objects (Horizontal Container, Vertical Container, Text, Extension, Ask Data).
- Central View:** A bar chart titled "Year-on Year Sales" for the year 2011, showing sales for Q1, Q2, Q3, Q4, and Q1 of the next year. The chart includes data labels for each bar.
- Actions Dialog:** A modal window titled "Actions".
 - Description: "Actions let you create interactive relationships between data, dashboard objects, other worksheets, and the web."
 - Radio buttons: "This workbook" (selected) and "This sheet".
 - Table:
 - Name: Product Category Filter, Run: Select, Fields: by Category, All
 - Filter:
 - Highlight... (selected)
 - Go to URL...
 - Go to Sheet...
 - Change Parameter...
 - Change Set Values...
 - Buttons: Add Action ▾, Edit, Remove, Cancel, OK.
- Bottom Status Bar:** Data Source, Year-on Year Sales, Number of Orders by Segments, Profit by Category and Year, Average Shipping Cost by Count..., Demo1, Shipping Cost & Order Segme..., Story 1, various icons.
- Bottom Footer:** 1 of 16 marks, 1 row by 16 columns, SUM(Sales): 570,263.

Step 4: Add Interactivity – Highlight Action

Tableau - Tableau-Creating Charts

Add Highlight Action

Name: **Highlight Profit**

Source Sheets: **Year-on Year Sales** (highlighted)

Run action on: Select

Target Sheets: **Demo1** (highlighted)

Target Highlighting: All Fields

Cancel OK

Category	Sub-Categories	Q2 2013	Q3 2013	Q4 2013	Q1 2014	Q2 2014	Q3 2014	Q4 2014
Furniture	Bookcase, Chairs, Furnishing, Tables	6,268	7,252	10,396	3,655	10,206	17,047	11,373
Office Supplies	Appliance Art, Binders, Envelopes, Fasteners, Labels, Paper, Storage, Supplies	6,538	8,943	9,775	8,364	4,155	5,389	12,479
Technology	Accessories, Copiers, Machines, Phones	1,040	2,420	4,171	2,378	2,250	4,040	1,715
		-3,838	-2,152	-5,870	-4,460	-7,491	-1,662	-10,171
		11,406	7,068	11,174	5,443	5,941	7,215	11,501
		2,303	2,482	3,098	2,112	3,163	4,790	3,956
		2,267	2,008	11,112	3,139	5,529	7,169	485
		935	2,829	1,599	1,200	944	1,285	2,201
		205	576	899	337	736	459	791
		478	800	875	596	804	1,481	849
		3,580	3,075	3,256	2,243	2,552	3,717	5,274
		3,305	6,468	7,965	3,838	5,396	8,313	7,937
		633	1,389	959	288	992	965	1,827
		5,116	6,913	9,561	2,743	6,095	10,420	8,024
		10,441	11,148	23,707	9,213	11,629	18,004	23,638
		4,380	3,214	-203	2,430	2,698	3,839	6,265
		15,955	4,947	12,608	6,918	10,770	6,961	16,319

Category	Sub-Categories	Q3 2013	Q4 2013	2014
		7.6%	18.9%	
		613,663	729,838	
		-38.1%	37.4%	
		451,850	620,952	
		26.2%	24.3%	
		783,364	973,778	
		Q3	Q4	
		Q1	Q2	
		Q3	Q4	

Data Source: Year-on Year Sales Number of Order

1 of 16 marks 1 row by 16 columns SUM(Sales): 570,263

PRACTICE (10 MINS): HIGHLIGHT ACTIONS

Objectives

1. Recreate the dashboard, add a highlight action:

- **Source sheet:** bar chart
- **Target sheet:** highlight table

2. Discuss difference between filter actions and highlight actions.

Year-on Year Sales



Profit by Category and Year

Category	Sub-Category	2011				2012				2013				2014			
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Furniture	Bookcases	2,658	3,846	4,989	9,645	23	6,328	3,777	7,662	7,336	6,268	7,252	10,396	3,655	10,206	17,047	11,373
	Chairs	2,003	3,708	3,358	10,527	-284	5,163	5,898	6,700	3,840	6,538	8,943	9,775	8,364	4,155	5,389	12,479
	Furnishings	730	75	2,073	1,678	1,012	1,956	2,328	1,982	1,086	1,040	2,420	4,171	2,378	2,250	4,040	1,715
	Tables	-2,029	-2,643	-1,300	-329	-1,710	-1,360	1,153	-6,051	1,845	-3,838	-2,152	-5,870	-4,460	-7,491	-1,662	-10,171
Office Supplies	Appliances	2,272	5,887	5,433	4,132	1,440	4,766	6,616	3,721	5,087	11,406	7,068	11,174	5,443	5,941	7,215	11,501
	Art	1,029	2,298	2,000	2,191	599	1,509	2,573	3,313	1,569	2,303	2,482	3,098	2,112	3,163	4,790	3,956
	Binders	1,131	2,910	3,512	1,030	1,570	5,233	2,337	1,045	3,172	2,267	2,008	11,112	3,139	5,529	7,169	485
	Envelopes	206	831	1,374	570	368	1,204	1,203	1,751	1,164	935	2,829	1,599	1,200	944	1,285	2,201
	Fasteners	201	360	502	293	341	513	477	503	45	205	576	899	337	736	459	791
	Labels	292	517	573	768	445	582	411	630	294	478	800	875	596	804	1,481	849
	Paper	865	1,222	2,206	3,249	961	675	1,892	3,216	2,024	3,580	3,075	3,256	2,243	2,552	3,717	5,274
	Storage	2,063	481	2,252	5,209	4,237	3,958	1,805	2,615	3,082	3,305	6,468	7,965	3,838	5,396	8,313	7,937

Step 5: Change the view visually

Tableau - Tableau-Creating Charts

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Dashboard Layout Control visibility using value Position

Sales & Profit

Profit by Category and Year

Category	Sub-Category	2011				2012				Order Date				2013				2014			
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Furniture	Bookcases	2,658	3,846	4,989	9,645	23	6,328	3,777	7,662	7,336	6,268	7,252	10,396	3,655	10,206	17,047	11,373				
	Chairs	2,003	3,708	3,358	10,527	-284	5,163	5,898	6,700	3,840	6,538	8,943	9,775	8,364	4,155	5,389	12,479				
	Furnishings	730	75	2,073	1,678	1,012	1,956	2,328	1,982	1,086	1,040	2,420	4,171	2,378	2,250	4,040	1,715				
	Tables	-2,029	-2,643	-1,300	-329	-1,710	-1,360	1,153	-6,051	1,845	-3,838	-2,152	-5,870	-4,460	-7,491	-1,662	-10,171				
Office Supplies	Appliances	2,272	5,887	5,433	4,132	1,440	4,766	6,616	3,721	5,087	11,406	7,068	11,174	5,443	5,941	7,215	11,501				
	Art	1,029	2,298	2,000	2,191	599	1,509	2,573	3,313	1,569	2,303	2,482	3,098	2,112	3,163	4,790	3,956				
	Binders	1,131	2,910	3,512	1,030	1,570	5,233	2,337	1,045	3,172	2,267	2,008	11,112	3,139	5,529	7,169	485				
	Envelopes	206	831	1,374	570	368	1,204	1,203	1,751	1,164	935	2,829	1,599	1,200	944	1,285	2,201				
	Fasteners	201	360	502	293	341	513	477	503	45	205	576	899	337	736	459	791				
	Labels	292	517	573	768	445	582	411	630	294	478	800	875	596	804	1,481	849				
	Paper	865	1,222	2,206	3,249	961	675	1,892	3,216	2,024	3,580	3,075	3,256	2,243	2,552	3,717	5,274				
	Storage Supplies	2,063	481	2,252	5,209	4,237	3,958	1,805	2,615	3,082	3,305	6,468	7,965	3,838	5,396	8,313	7,937				
	Technology	576	762	791	787	176	727	975	1,575	1,003	633	1,389	959	288	992	965	1,827				
	Accessories	1,207	3,152	1,445	3,969	3,176	5,192	5,973	6,481	3,463	5,116	6,913	9,561	2,743	6,095	10,420	8,024				
	Copiers	376	4,952	5,045	10,743	5,910	12,834	6,344	9,978	5,835	10,441	11,148	23,707	9,213	11,629	18,004	23,638				
	Machines	365	764	-1,257	3,995	1,171	2,275	5,788	133	4,983	4,380	3,214	-203	2,430	2,698	3,839	6,265				
	Phones	3,819	9,314	8,373	11,310	4,412	6,337	6,401	10,081	4,715	15,955	4,947	12,608	6,918	10,770	6,961	16,319				

Year-on Year Sales

Sales	2011				2012				Order Date				2013				2014			
	2011	2012	2013	2014	2011	2012	2013	2014	2011	2012	2013	2014	2011	2012	2013	2014	2011	2012	2013	2014
216,542	330,149	411,229	585,021	52.5%	24.6%	42.3%	56.1%	61.5%	16.4%	21.9%	33.2%	45.0%	7.6%	18.9%	26.2%	216,542	330,149	411,229	585,021	
216,542	330,149	411,229	585,021	52.5%	24.6%	42.3%	56.1%	61.5%	16.4%	21.9%	33.2%	45.0%	7.6%	18.9%	26.2%	216,542	330,149	411,229	585,021	
216,542	330,149	411,229	585,021	52.5%	24.6%	42.3%	56.1%	61.5%	16.4%	21.9%	33.2%	45.0%	7.6%	18.9%	26.2%	216,542	330,149	411,229	585,021	

Background colour

Border None

Background None

None

More colors...

Opacity 0 %

Data Source -on Year Sales Number of Orders by Segments Profit by Category and Year Average Shipping Cost by Count... Demo1 Shipping Cost & Order Segme... Dashboard 3 Story 1

Step 5: Change the view visually

Tableau - Tableau-Creating Charts

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Dashboard Layout

Control visibility using value

Position x 8 y 8

Size w 1,588 h 49

Border None

Background None

Outer Padding 4 4 4 4

Inner Padding 0 0 0 0

Item hierarchy Demo1

- Profit
- Sales
- Tiled

Profit by Category and Year

2011

Category	Sub-Category	Q1	Q2	Q3
Furniture	Bookcases	2,658	3,846	4,989
	Chairs	2,003	3,708	3,358
	Furnishings	730	75	2,073
	Tables	-2,029	-2,643	-1,300
Office Supplies	Appliances	2,272	5,887	5,433
	Art	1,029	2,298	2,000
	Binders	1,131	2,910	3,512
	Envelopes	206	831	1,374
	Fasteners	201	360	502
	Labels	292	517	573
	Paper	865	1,222	2,206
	Storage Supplies	2,063	481	2,252
Technology	Accessories	1,207	3,152	1,445
	Copiers	376	4,952	5,045
	Machines	365	764	-1,257
	Phones	3,819	9,314	8,373
		11,310	4,412	6,337
			6,401	10,081
			4,715	15,955

Sales & Profit

Edit Title

Tableau Book 18 Insert

Sales & Profit

Reset OK Cancel Apply

Double click the text to change text format

Year-on Year Sales

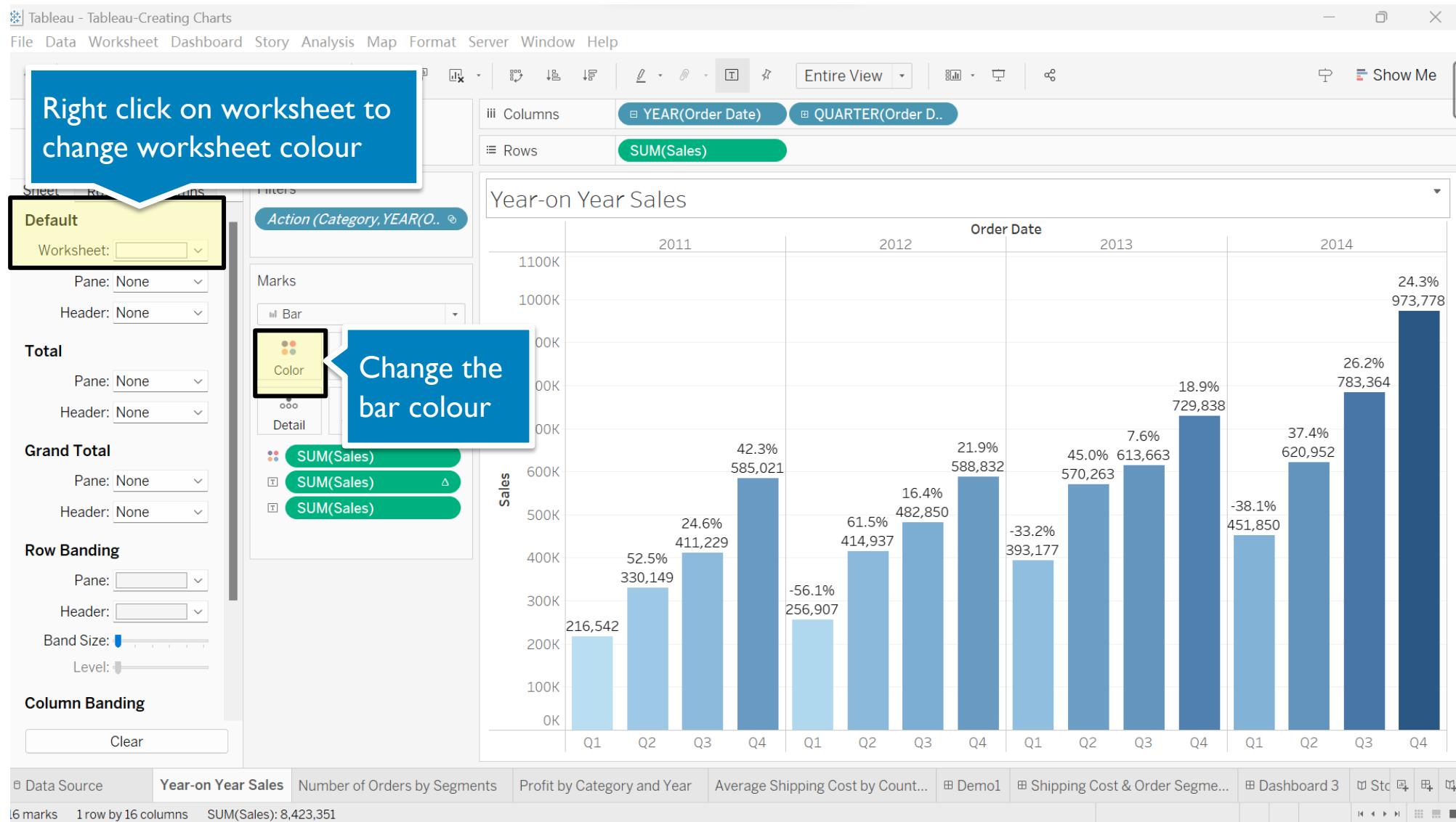
Sales 216,542 973,778

Order Date

	2011	2012	2013	2014
Sales	216,542	330,149	411,229	585,021
	52.5%	24.6%	42.3%	
	256,907	414,937	482,850	588,832
	-56.1%	61.5%	16.4%	21.9%
	393,177	570,263	613,663	729,838
	-33.2%	45.0%	7.6%	18.9%
	451,850	620,952	783,364	973,778
	-38.1%	37.4%	26.2%	24.3%

Data Source Year-on Year Sales Number of Orders by Segments Profit by Category and Year Average Shipping Cost by Count... Demo1 Shipping Cost & Order Segme... Dashboard 3 Story 1

Step 5: Change the view visually



PRACTICE (5 MINS): CHANGE THE VIEW

Objectives

Play with color, fonts, borders, and backgrounds.

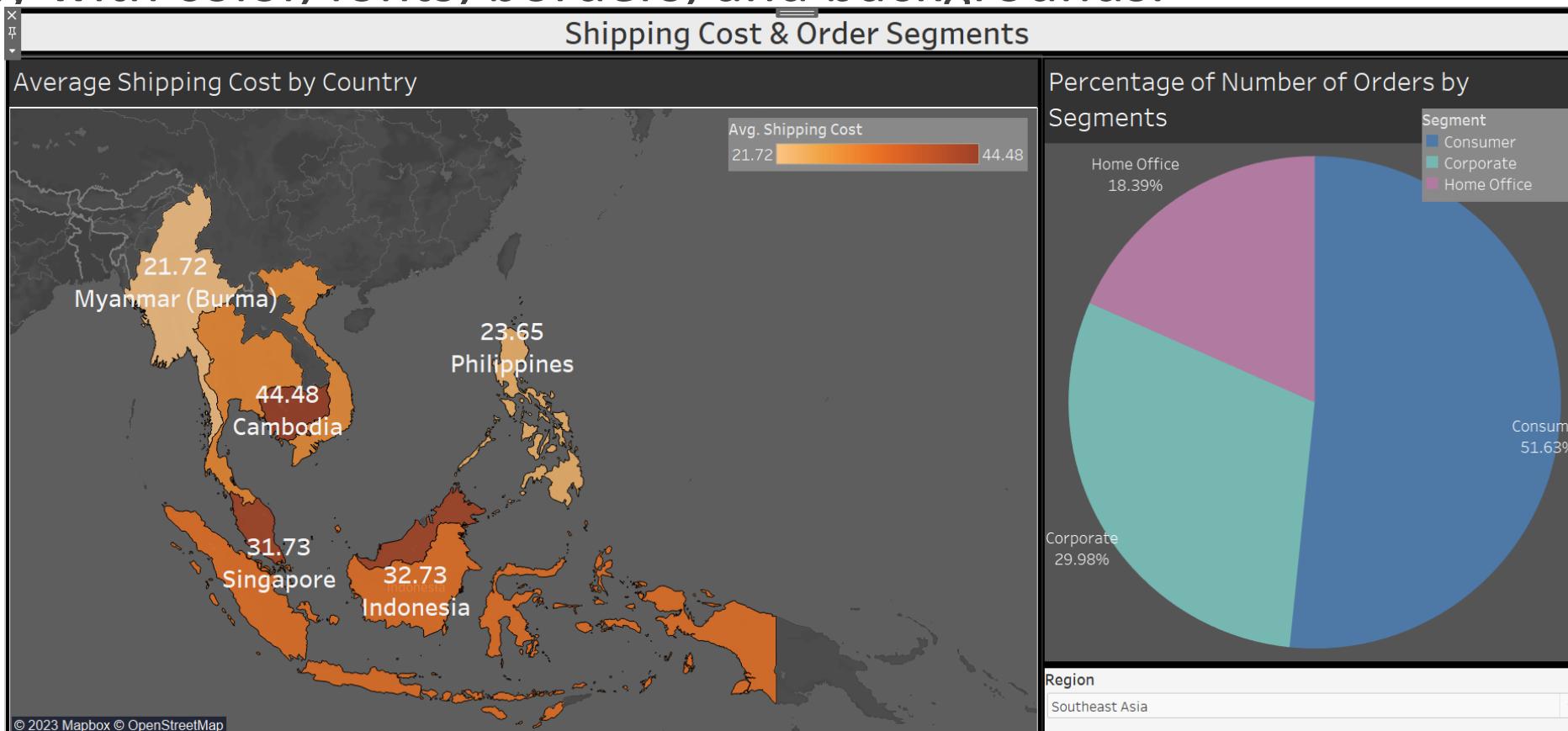
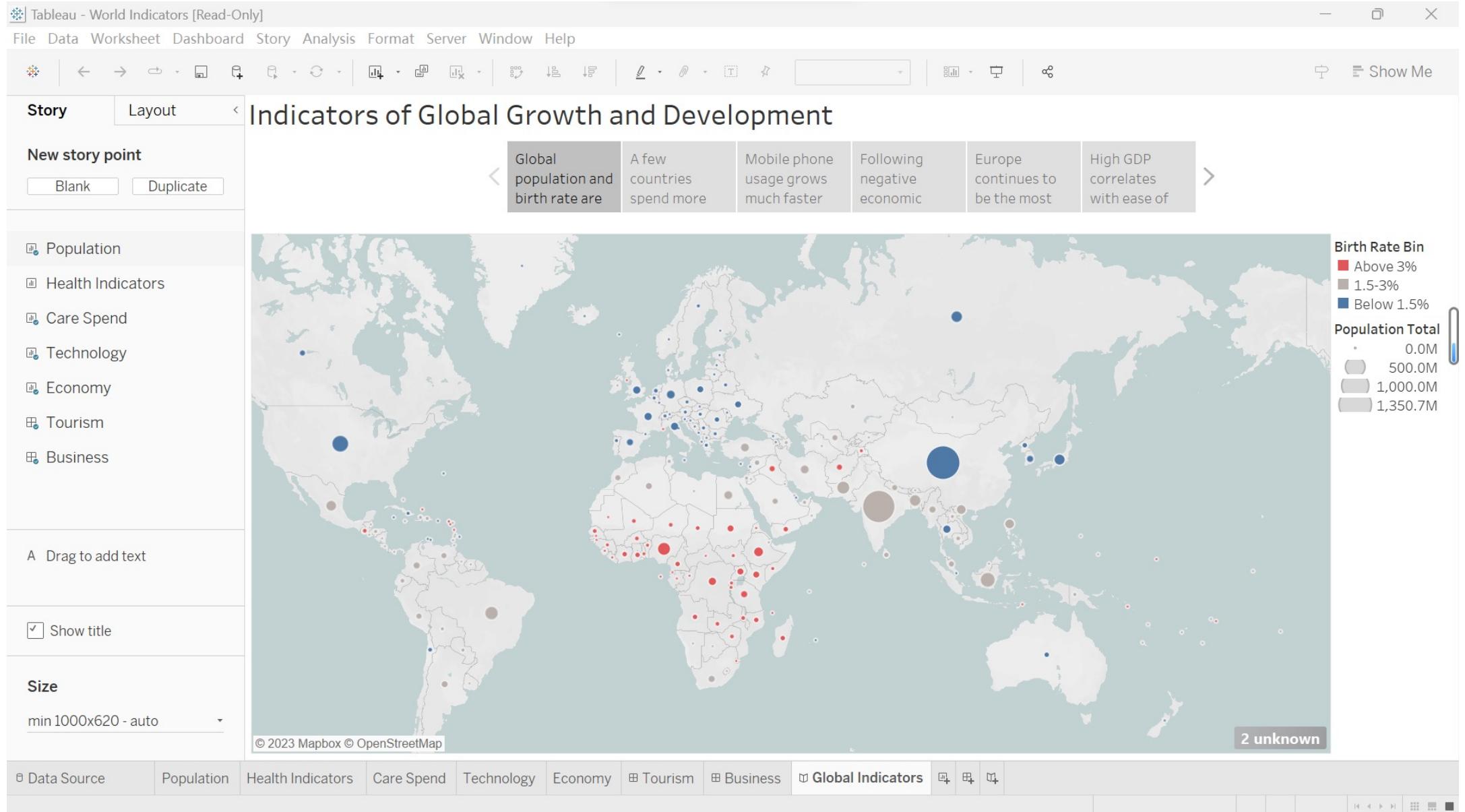


TABLEAU STORIES



Story Layout

New story point Blank Duplicate

Indicators of Global Growth and Development

Global population and birth rate are A few countries spend more Mobile phone usage grows much faster Following negative economic Europe continues to be the most High GDP correlates with ease of

Population

Health Indicators

Care Spend

Technology

Economy

Tourism

Business

A Drag to add text

Show title

Size
min 1000x620 - auto

International Tourism

Income By Region

Year	Oceania	Middle East	Africa	Asia	The Americas	Europe	Total
2001	\$0B	\$0B	\$0B	\$0B	\$0B	\$30B	\$50B
2002	\$0B	\$0B	\$0B	\$0B	\$0B	\$35B	\$55B
2003	\$0B	\$0B	\$0B	\$0B	\$0B	\$40B	\$60B
2004	\$0B	\$0B	\$0B	\$0B	\$0B	\$45B	\$65B
2005	\$0B	\$0B	\$0B	\$0B	\$0B	\$50B	\$70B
2006	\$0B	\$0B	\$0B	\$0B	\$0B	\$55B	\$75B
2007	\$0B	\$0B	\$0B	\$0B	\$0B	\$60B	\$80B
2008	\$0B	\$0B	\$0B	\$0B	\$0B	\$65B	\$85B
2009	\$0B	\$0B	\$0B	\$0B	\$0B	\$70B	\$90B
2010	\$0B	\$0B	\$0B	\$0B	\$0B	\$75B	\$95B
2011	\$0B	\$0B	\$0B	\$0B	\$0B	\$80B	\$100B
2012	\$0B	\$0B	\$0B	\$0B	\$0B	\$85B	\$105B

Year Range 2001 2012

Region (All) Africa Asia Europe Middle East Oceania The Americas

Country/Region Highlight Country...

Spain \$57B Germany \$44B Türkiye \$22B United States \$146B China \$38B Macao SAR Thailand Australia \$25B France \$56B United Kingdom \$40B Austria Poland Italy \$40B

Data Source Population Health Indicators Care Spend Technology Economy Tourism Business Global Indicators

What are Tableau Stories?

A story is **a sequence of visualizations** that work together to convey information.

Each individual sheet in a story is called a **story point**.

It allows users to build a narrative and guide the audience through a data-driven story.

Using stories to communicate complex information effectively.

Building a Tableau Story

Step 1: Selecting visualizations.

Select the most relevant worksheets, dashboards, or both, for the story.

Step 2: Arranging visualizations.

Make a smooth transition between visualizations.

Use caption update to save a state of visualization.

Step 3: Adding text and annotations.

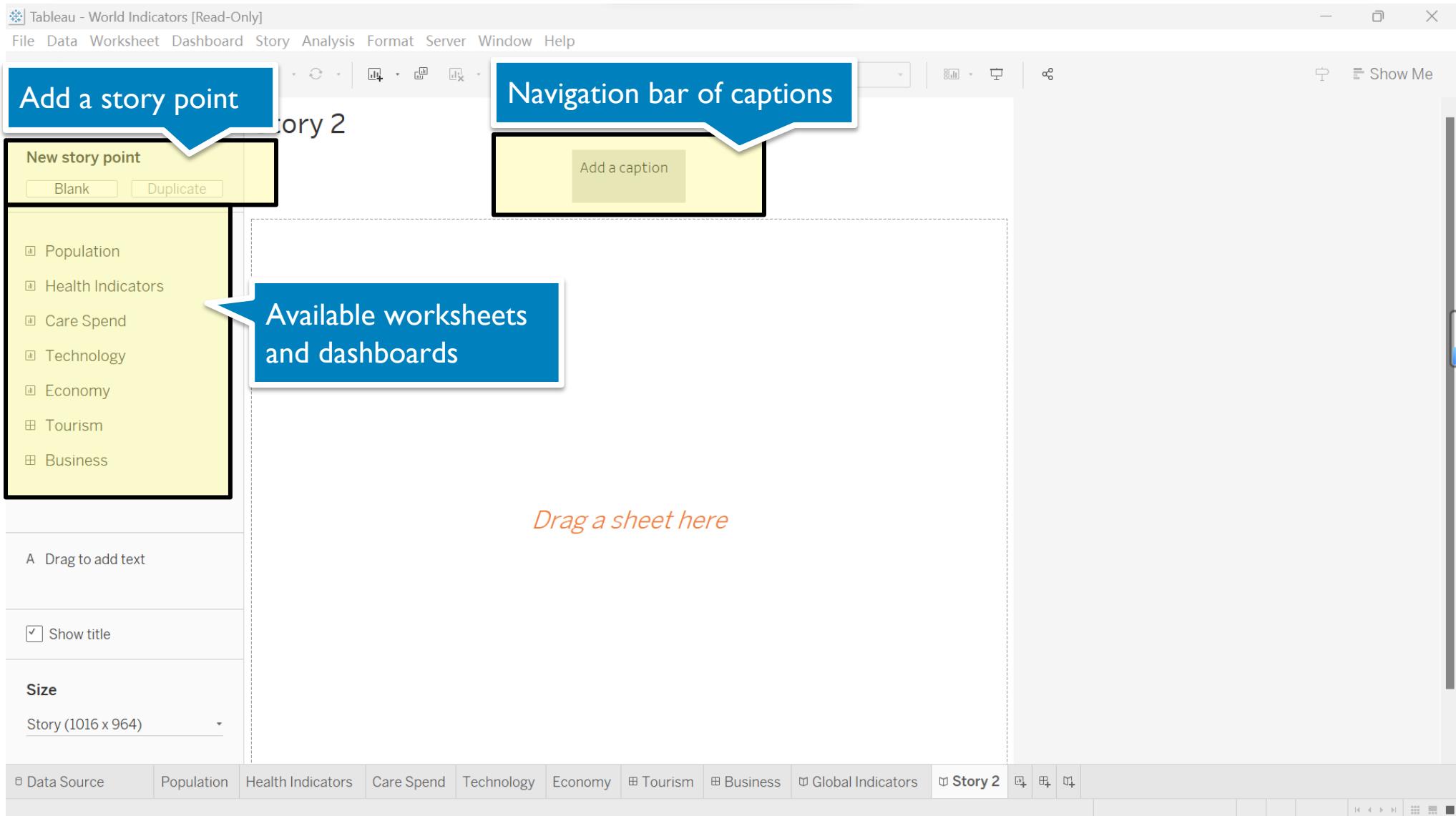
Use text and annotations to provide context information, insights, explanations, and key takeaways.

It used to guide audience' attention.

Step 4: Change the view visually.

Change color schemes, fonts, borders, and backgrounds.

Step 1: Selecting Visualizations

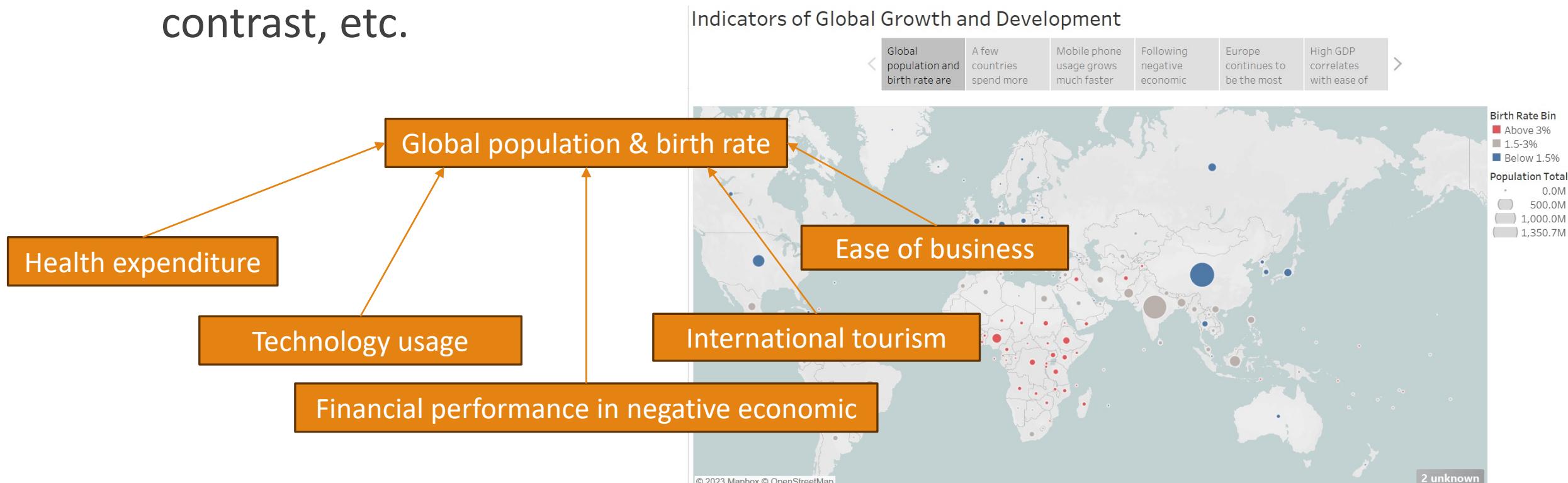


Step 2: Arranging Visualizations

Dashboard in a story point? Or single worksheet?

Sequence of story points: which one goes first?

Follow logical manner: change over time, top down, bottom up, contrast, etc.



Step 2: Arranging Visualizations

Tableau - World Indicators

File Data Worksheet Dashboard Story Analysis Format Server

Story Layout

New story point

Blank Duplicate

Population Health Indicators Care Spend Technology Economy Tourism Business

A Drag to add text

Show title

Size

min 1000x620 - auto

Global population and birth rate are A few countries spend more Mobile phone usage grows much faster Following negative economic Europe continues to be the most High GDP correlates with ease of

Indicators of Global Growth and Development

Global population and birth rate are A few countries spend more Mobile phone usage grows much faster Following negative economic Europe continues to be the most High GDP correlates with ease of

Birth Rate Bin

- Above 3%
- 1.5-3%
- Below 1.5%

Population Total

- 0.0M
- 500.0M
- 1,000.0M
- 1,350.7M

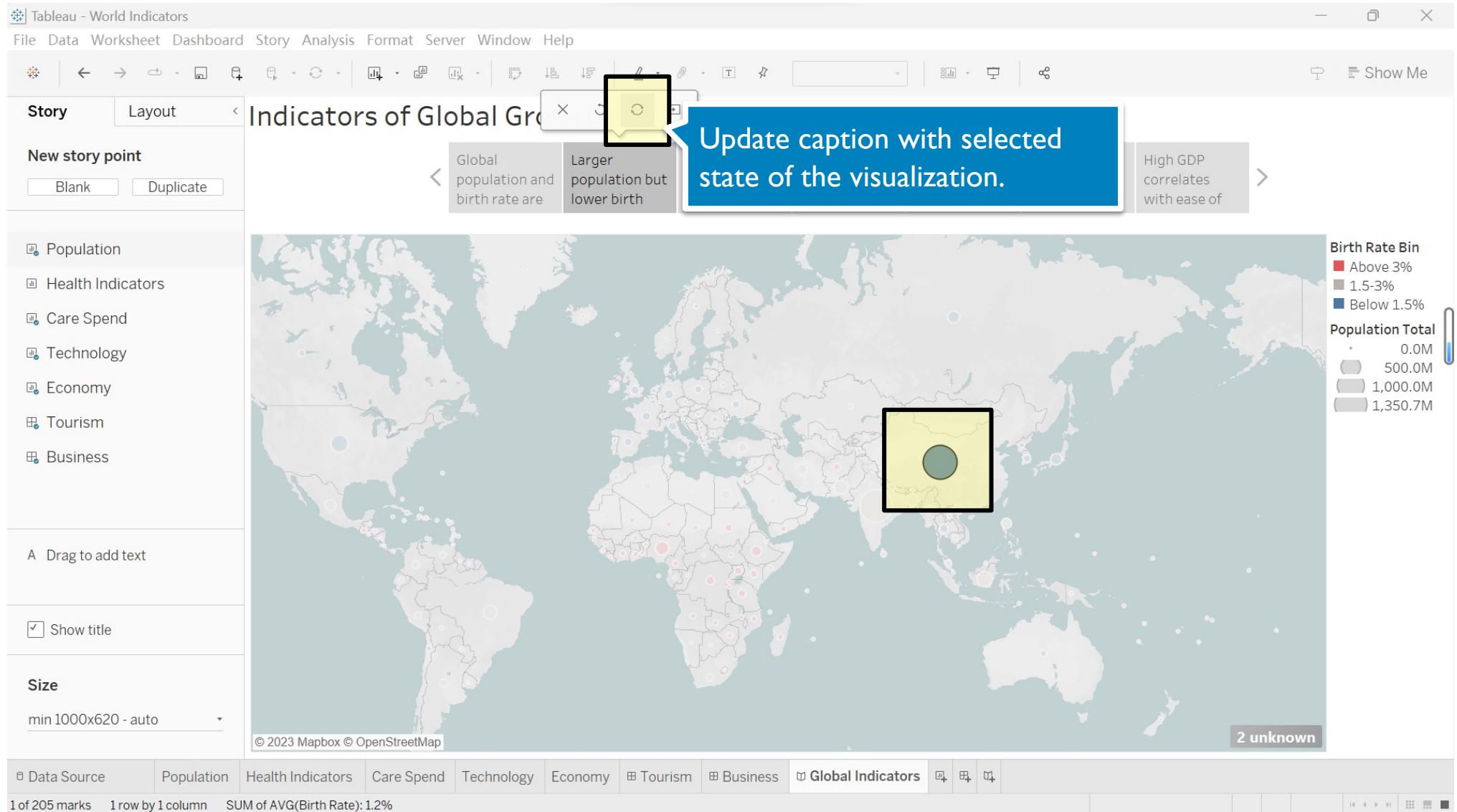
© 2023 Mapbox © OpenStreetMap

2 unknown

Drag worksheets or dashboards on the navigation bar

Data Source Population Health Indicators Care Spend Technology Economy Tourism Business Global Indicators

Step 2: Arranging Visualizations

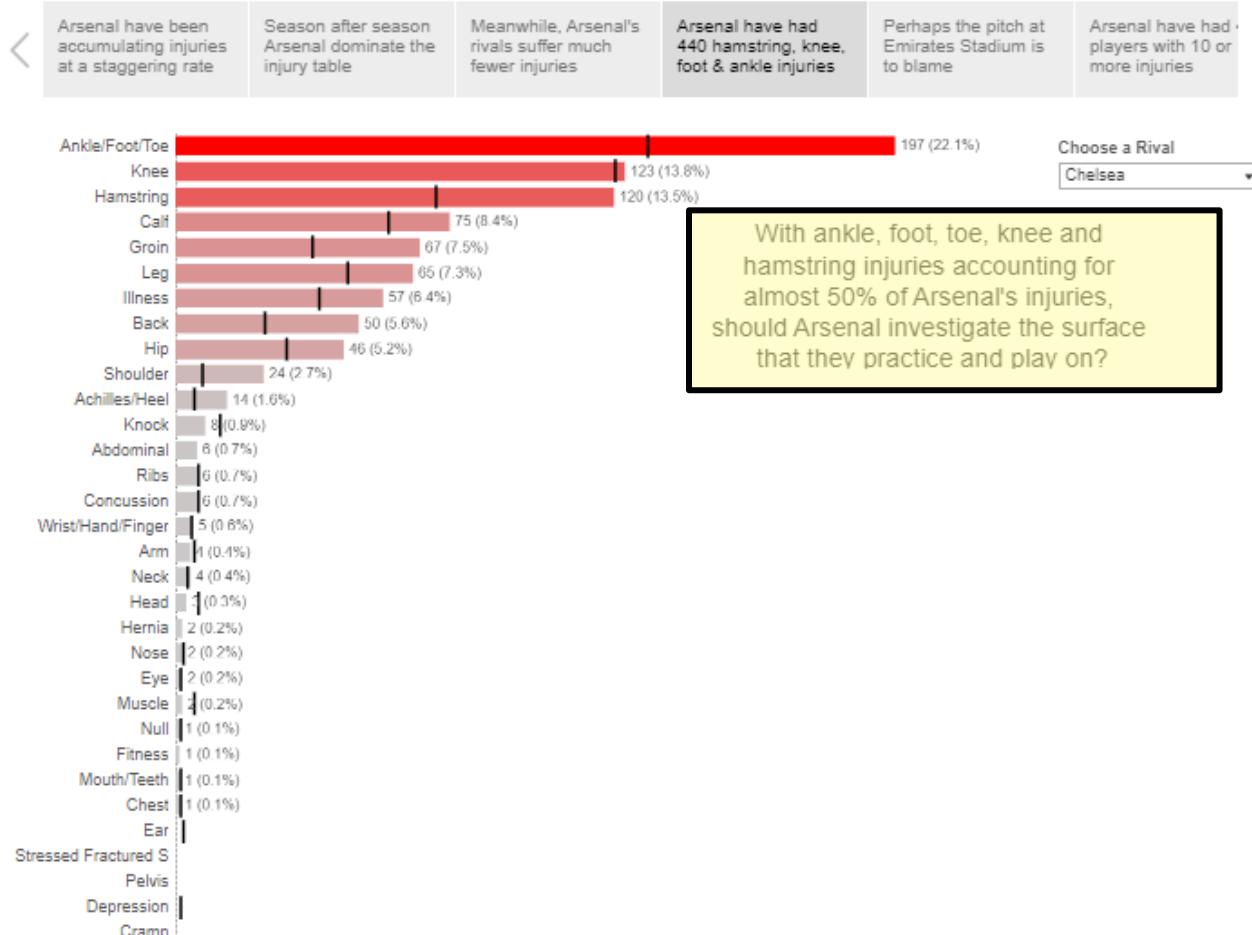


Step 3: Adding Text & Annotations

Arsenal's Injury Crisis

Players have suffered nearly 900 injuries in 12 years and Arsene Wenger has admitted he does not understand why

* Study only includes teams that have been in the EPL every year since the 2002-03 season through 12 October 2014



Step 3: Adding Text & Annotations

Tableau - World Indicators [Read-Only]

File Data Worksheet Dashboard Story Analysis Format Server Window Help

Story Layout Indicators of Global Growth and Development

New story point

Blank Duplicate

Population Health Indicators Care Spend Technology Economy Tourism

Global population and birth rate are A few countries spend more Mobile phone usage grows much faster Following negative economic Europe continues to be the most High GDP correlates with ease of

Drag and drop

A Drag to add text

Show title

Size min 1000x620 - auto

Birth Rate Bin Above 3% 1.5-3% Below 1.5%

Population Total 0.0M 500.0M 1,000.0M 1,350.7M

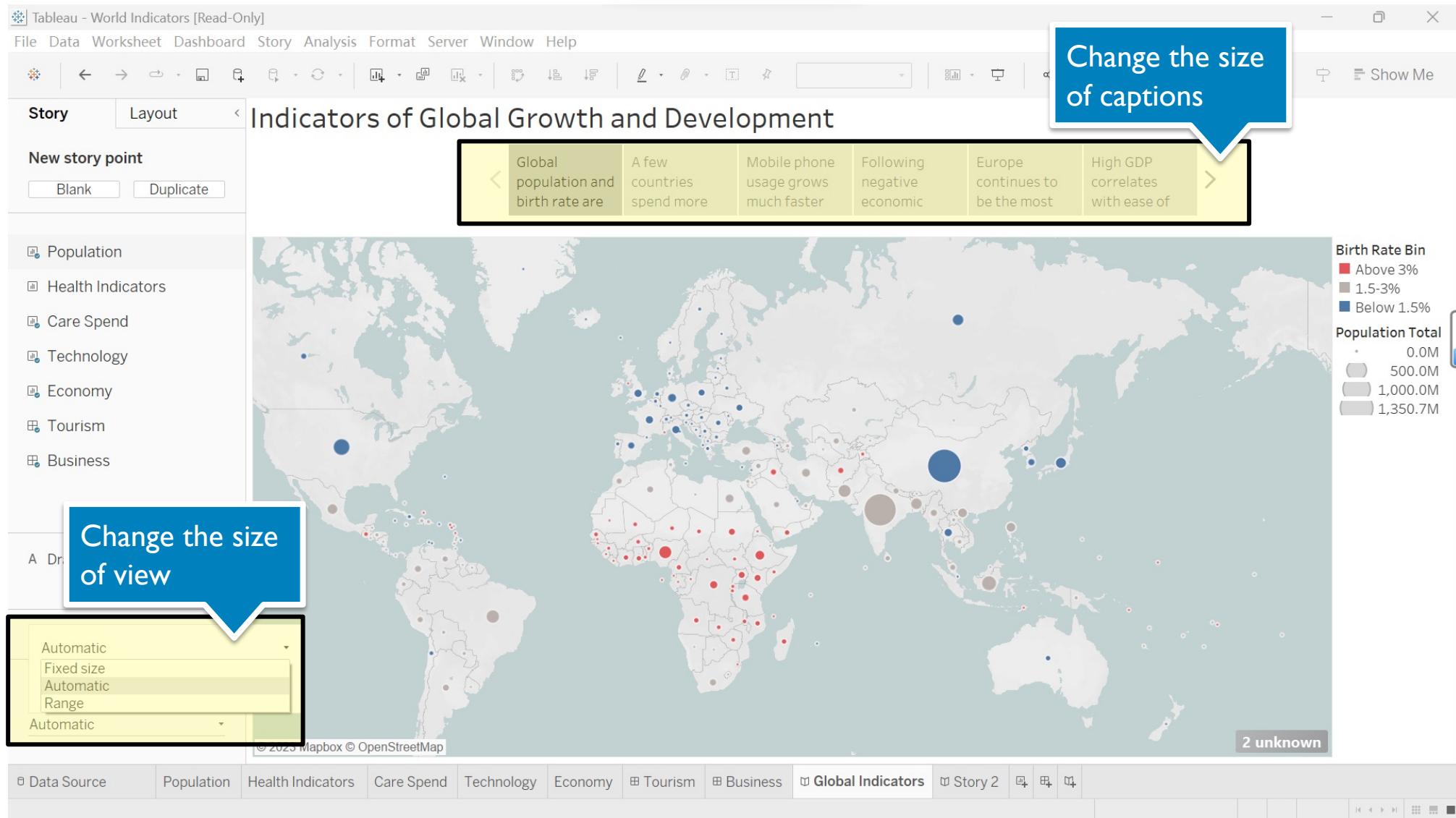
Edit Description Tableau Book 14 OK Cancel

© 2023 Mapbox © OpenStreetMap 2 unknown

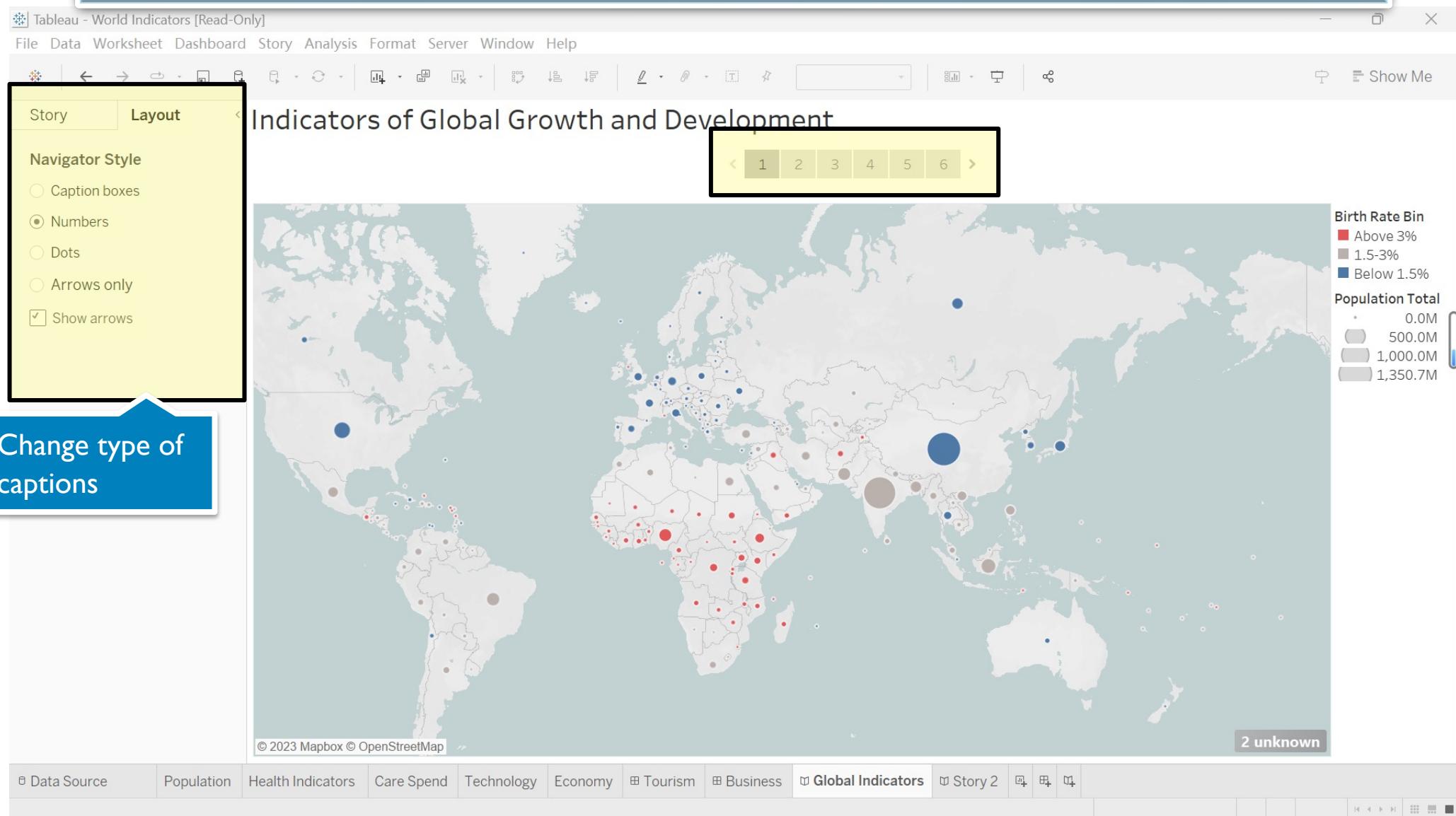
Data Source Population Health Indicators Care Spend Technology Economy Tourism Business Global Indicators Story 2

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Step 4: Change the view visually



Step 4: Change the view visually



Step 4: Change the view visually

Change story format

Format Story

Shading

Default: None

Title

Font: Tableau Reg.. Alignment: Left Shading: None Border: None

Navigator

Font: Tableau Boo.. Shading:

Text Objects

Font: Tableau Boo.. Alignment: Center Shading: 85% Border:

Clear

Indicator and Development

Animations... Ctrl+Alt+A

Cell Size

Workbook Theme

Copy Formatting Paste Formatting

1 2 3 4 5 6

Birth Rate Bin

- Above 3%
- 1.5-3%
- Below 1.5%

Population Total

- 0.0M
- 500.0M
- 1,000.0M
- 1,350.7M

2 unknown

Data Source Population Health Indicators Care Spend Technology Economy Tourism Business Global Indicators Story 2

Clear all story formats

PRACTICE (15 MINS): CREATE A STORY

Objectives

1. Create a story to introduce business performance of the company:
 - Select relevant worksheets or dashboards
 - Arrange them appropriately
 - Use update caption to highlight certain findings
 - Add texts and annotation for necessary explanations
 - Improve visual view of the story

TABLEAU: Dashboards & Stories

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