

Lesson 08 Demo 01

Create a Story

Objective: Create a dynamic story to analyze sales and profit across segments and ship modes, effectively communicating insights

Tools required: Tableau Desktop

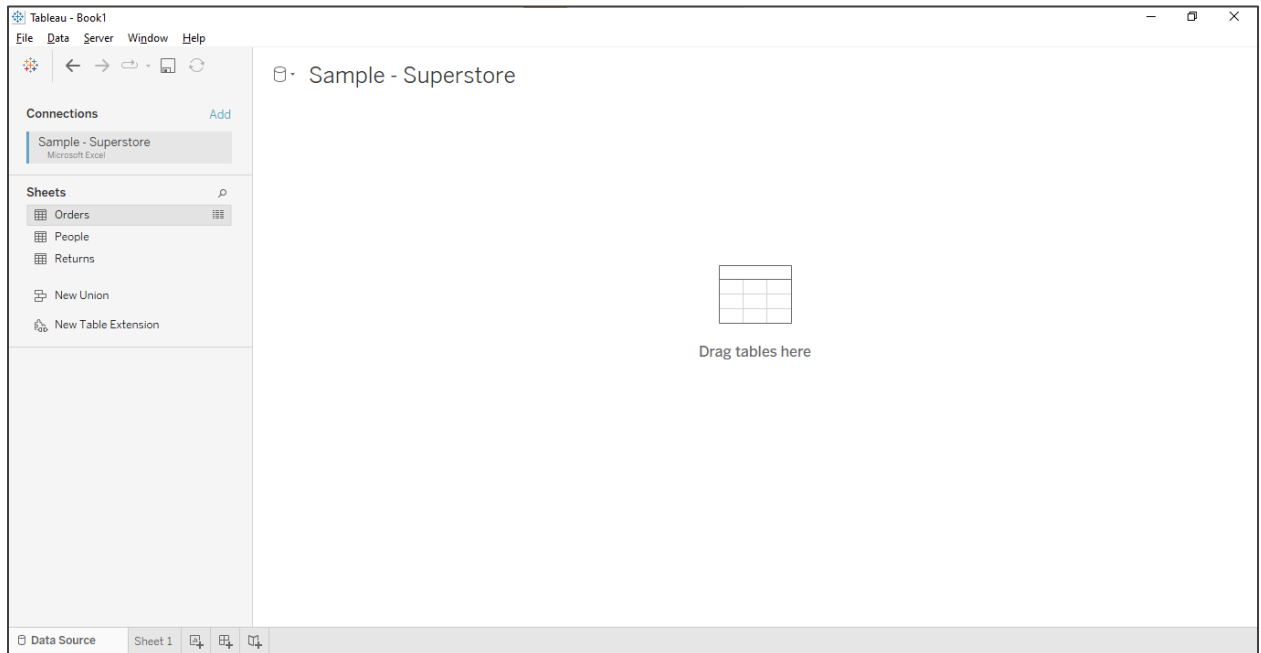
Prerequisites: None

Steps to be followed:

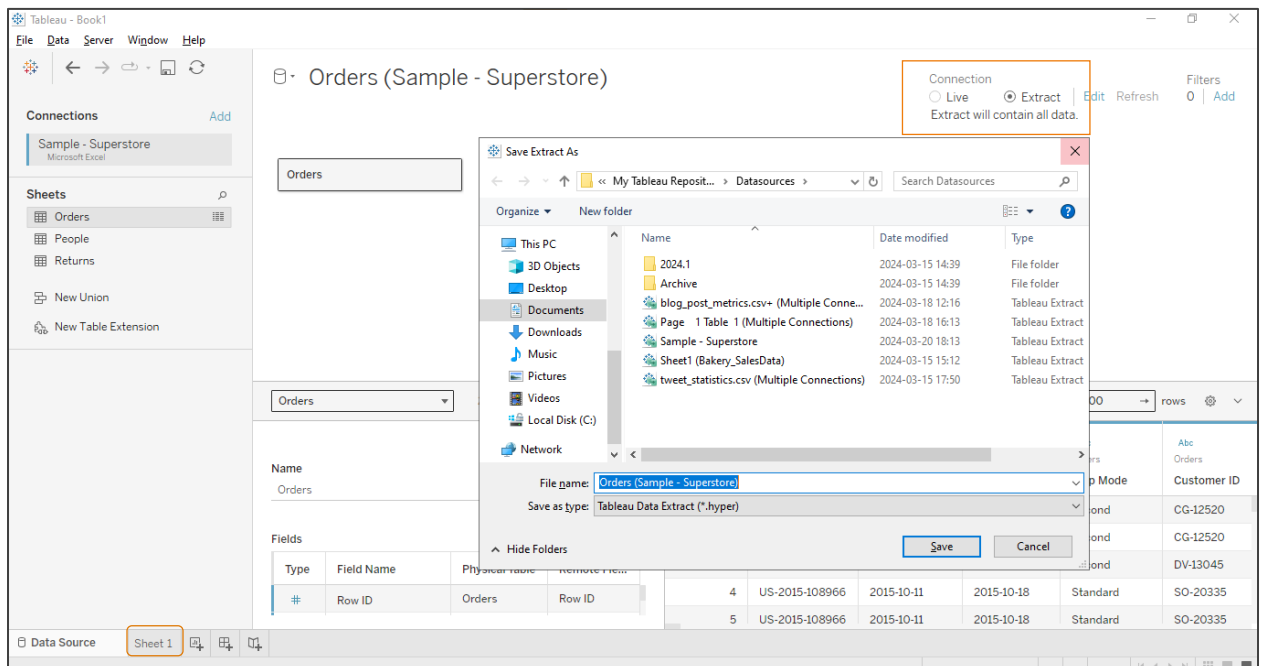
1. Import the dataset
2. Create a Dashboard
3. Create a Story

Step 1: Import the dataset

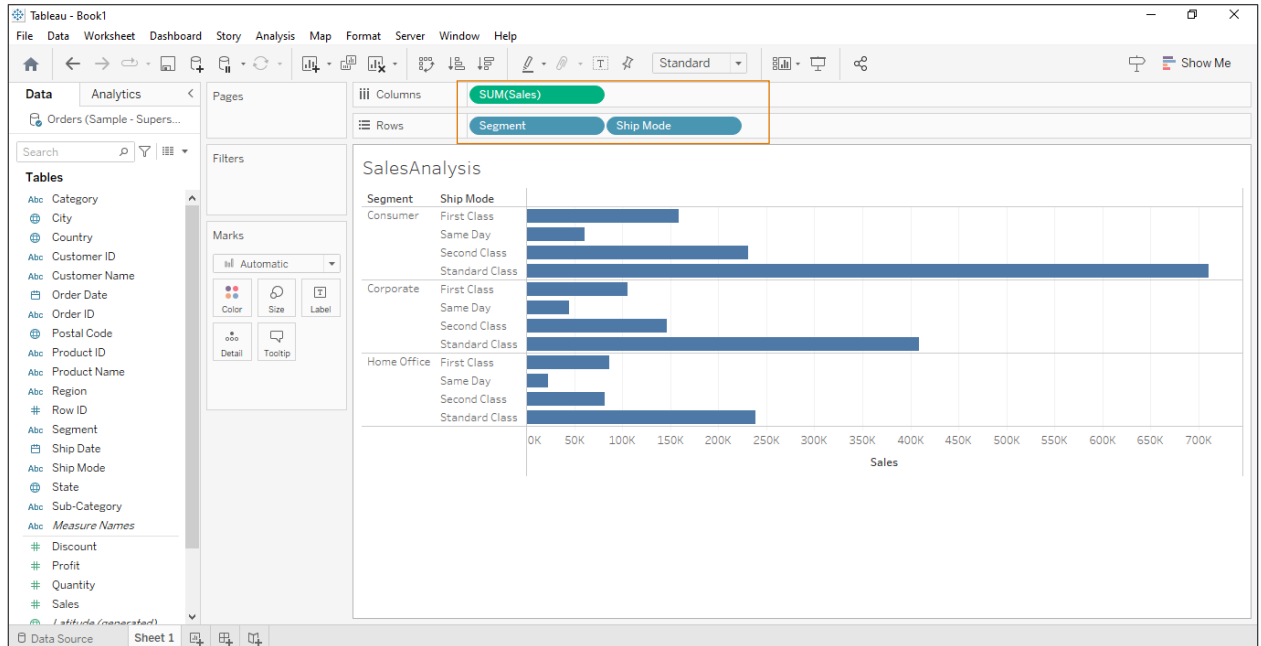
- 1.1 Open a new Tableau file and connect with the **Sample-Superstore** dataset. The data source will appear as shown below:



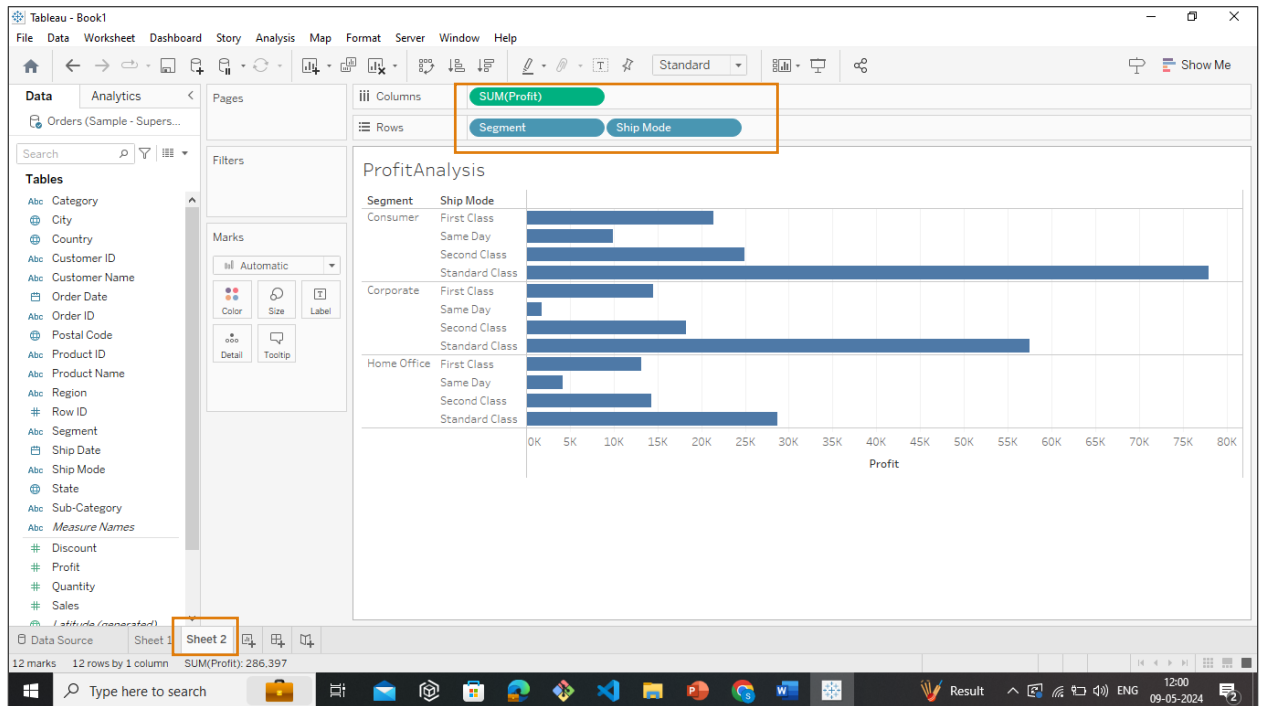
- 1.2 Drag the **Orders** table into the data model. Select **Extract** and click on **Sheet1**.



1.3 Drag the **Segment** and **Ship Mode** fields to **Rows** and **Sales** to **Columns**. Name the sheet **SalesAnalysis**.

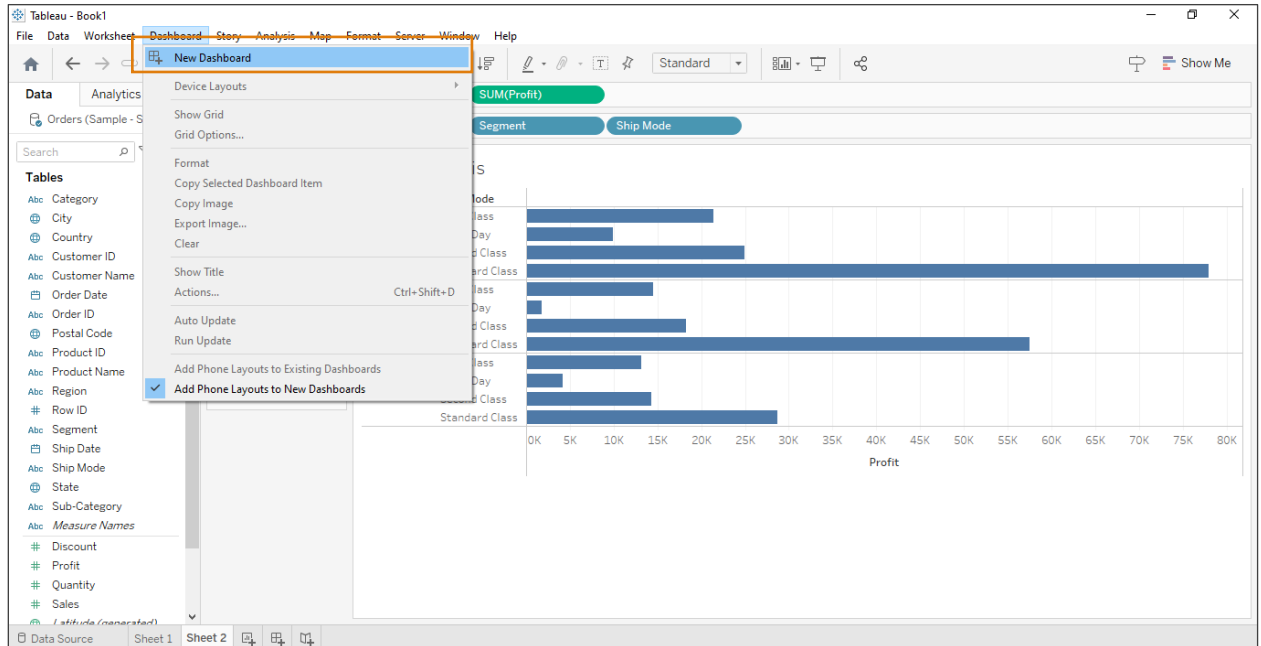


1.4 Drag the **Segment** and **Ship Mode** fields to **Rows** and **Profit** to **Columns** in the new sheet (**Sheet2**). Name the sheet **ProfitAnalysis**.

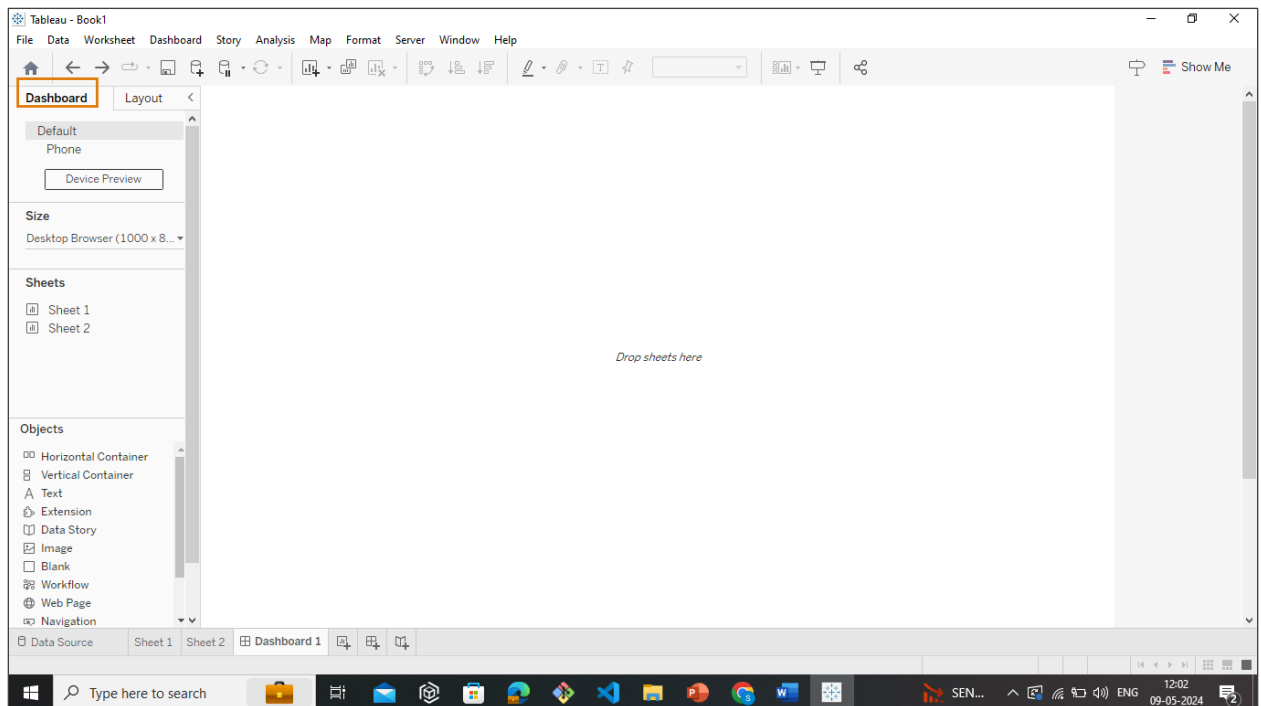


Step 2: Create a dashboard

2.1 Click on **Dashboard** on the top and select **New Dashboard** from the menu below



2.2 Click on **Dashboard**

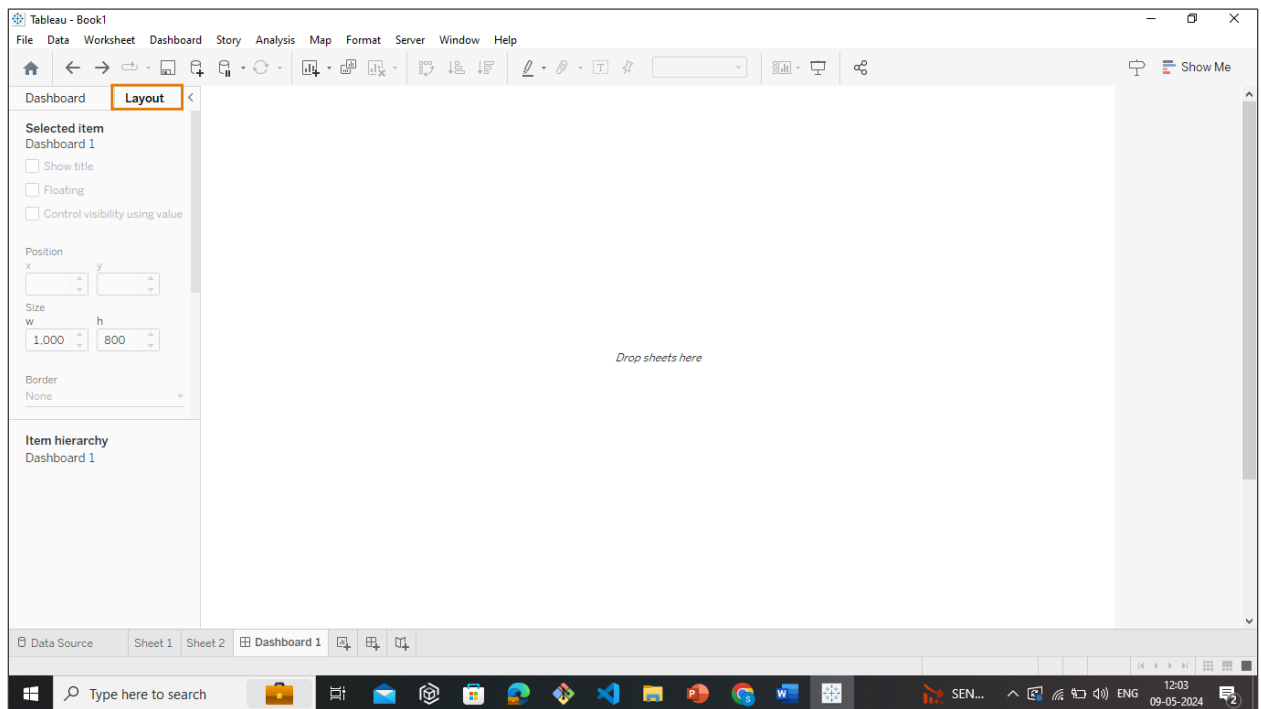


Observation: Dashboard Pane

These panes will help you work and create the dashboard by:

- Previewing dashboards on different devices
- Choosing the size of the dashboard
- Selecting from the existing charts in sheets
- Adding objects to the dashboard to create the layout

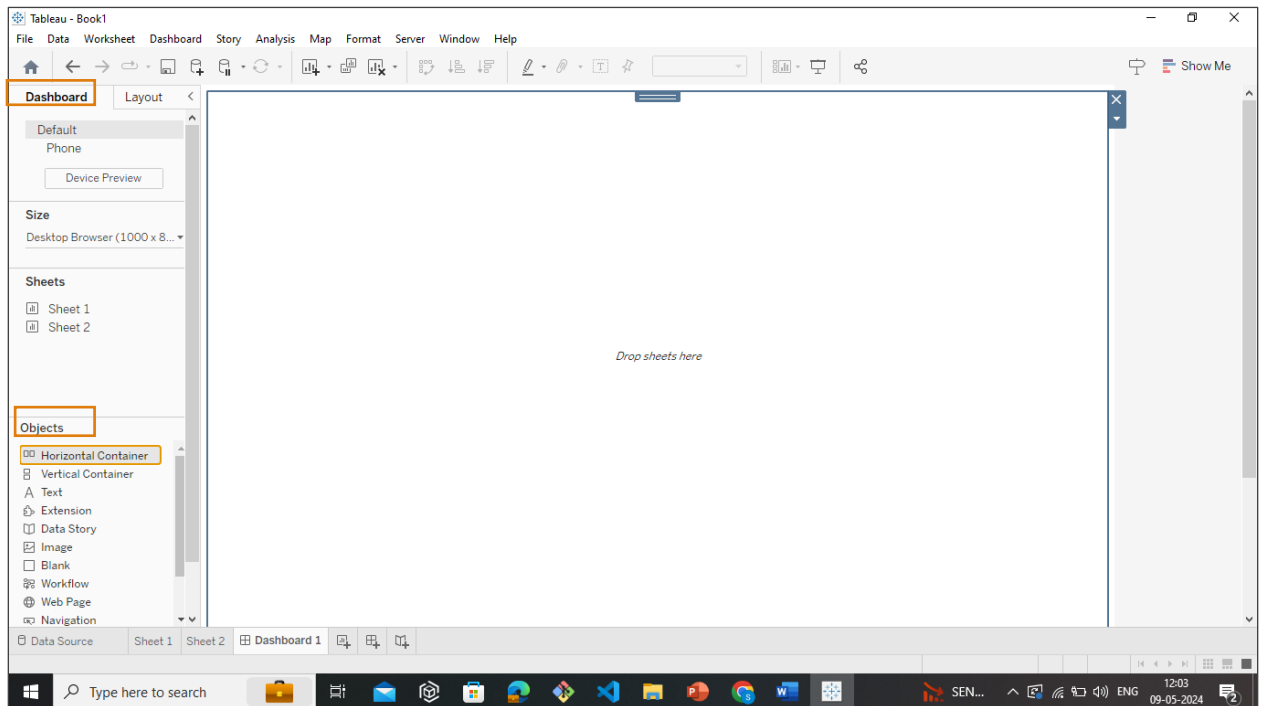
2.3 Click on **Layout**



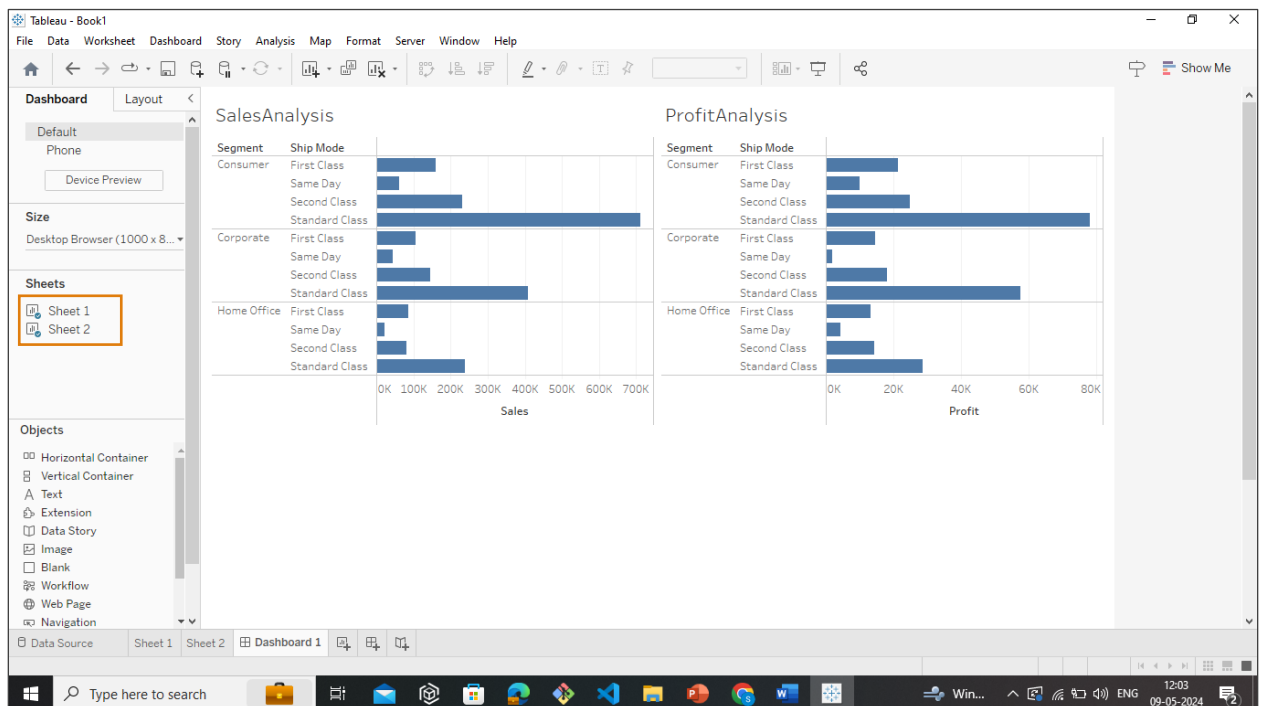
Observation: Layout Pane

- Format the objects on the dashboard
- View the Item Hierarchy for the charts

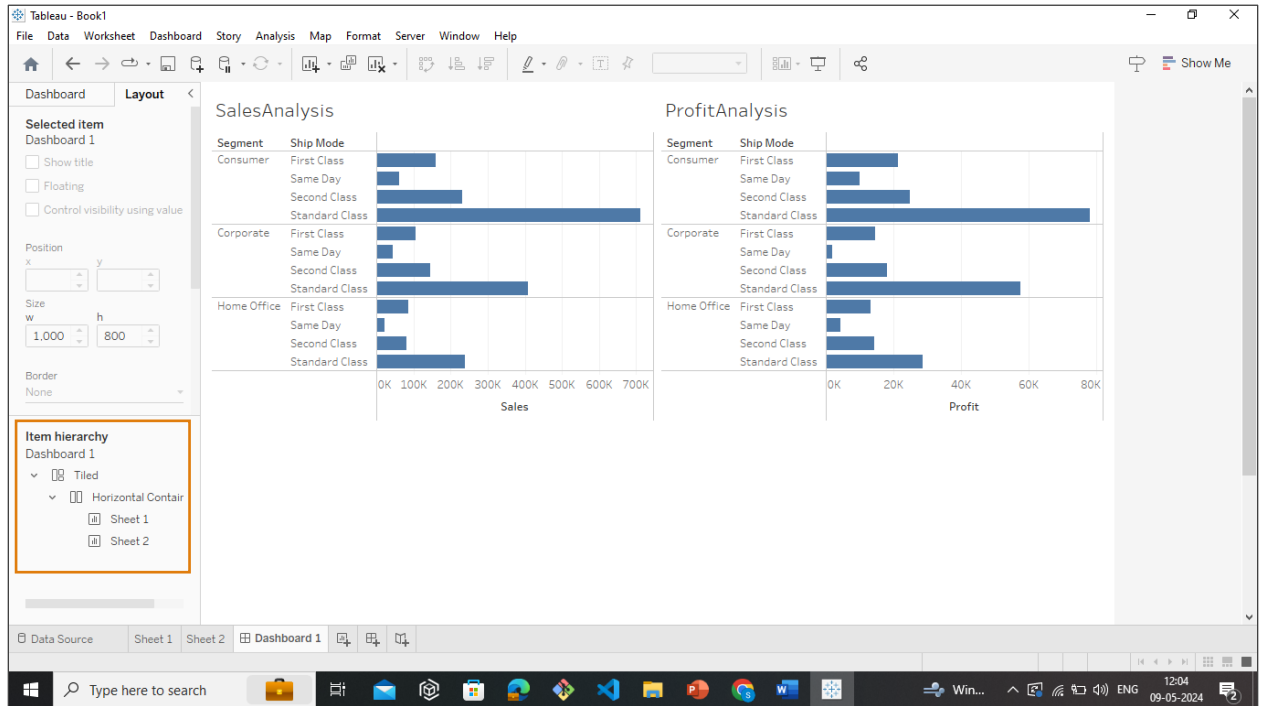
2.4 Go to **Dashboard** under **Objects** and double-click on **Horizontal Container**



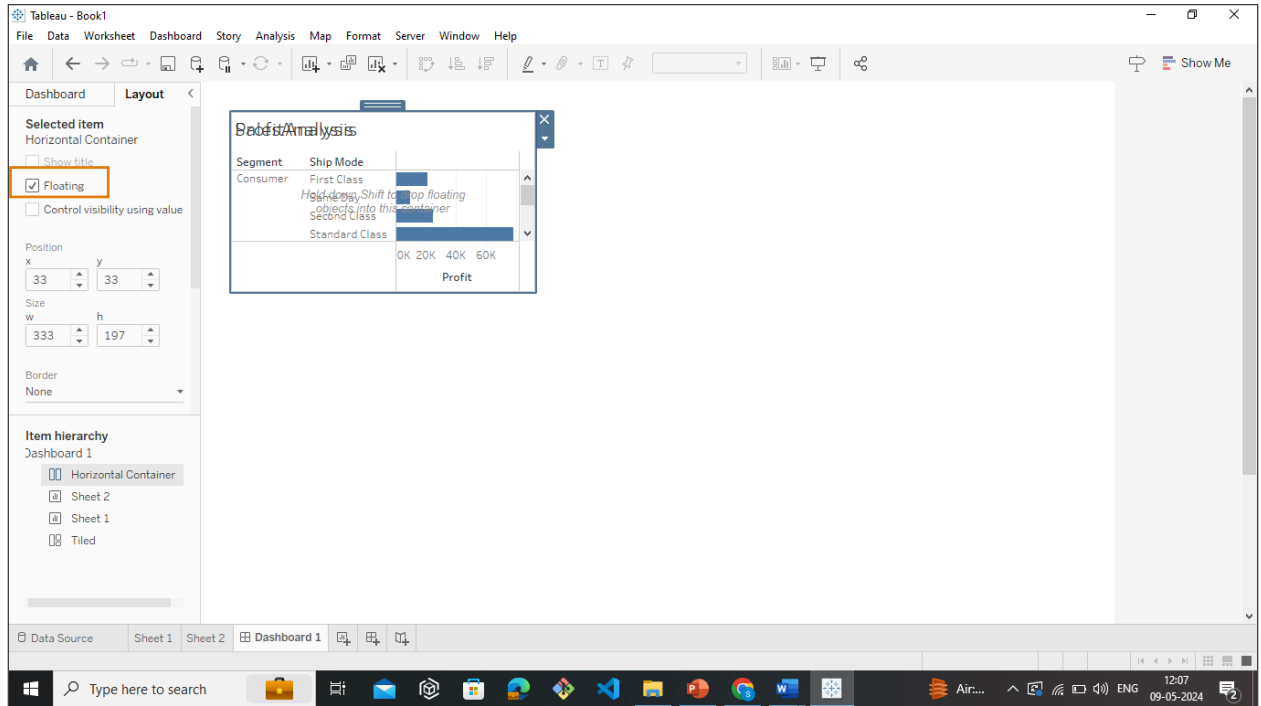
2.5 Drag **Sheet 1** and **Sheet 2** to the dashboard workspace



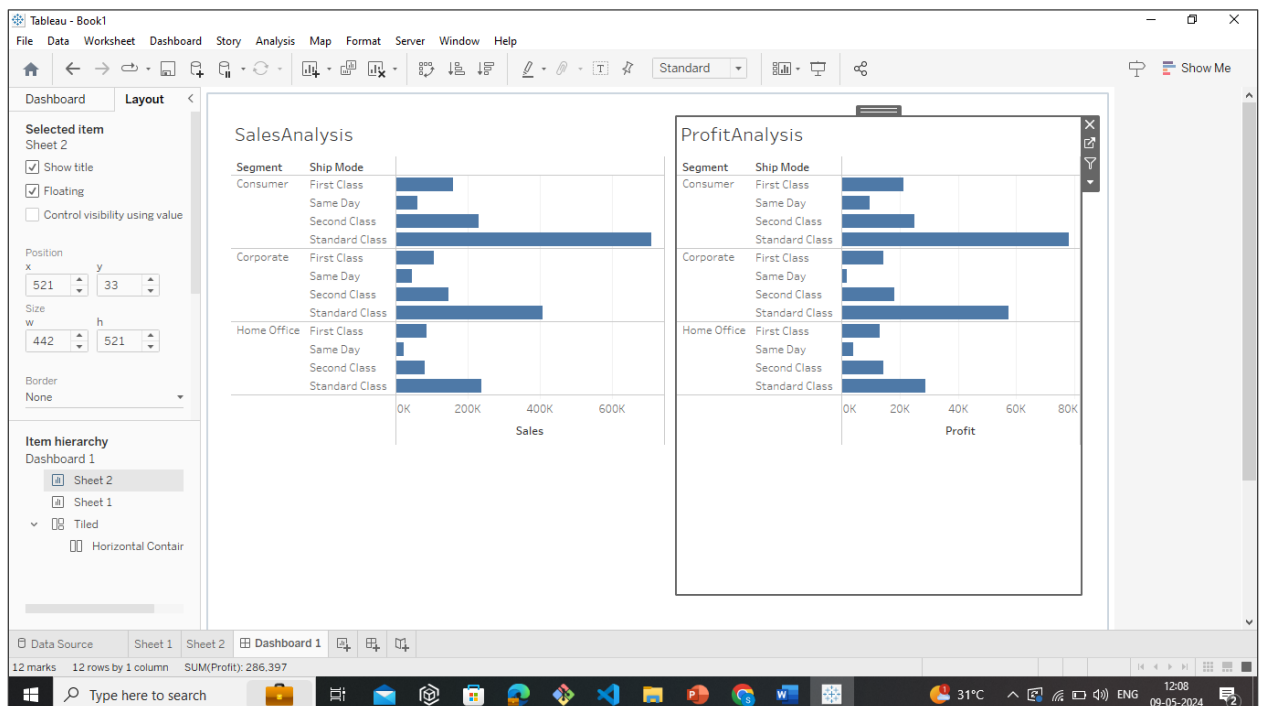
2.6 Go to the **Layout** section. At the bottom, you will see the item hierarchy and **Sheet 1** and **Sheet 2** placed as a child in the **Horizontal Container**.



2.7 Click on the chart; go to **Layout** and select **Floating** and then repeat the step for the other chart



2.8 Drag the charts side-by-side. Expand and fit the screen.

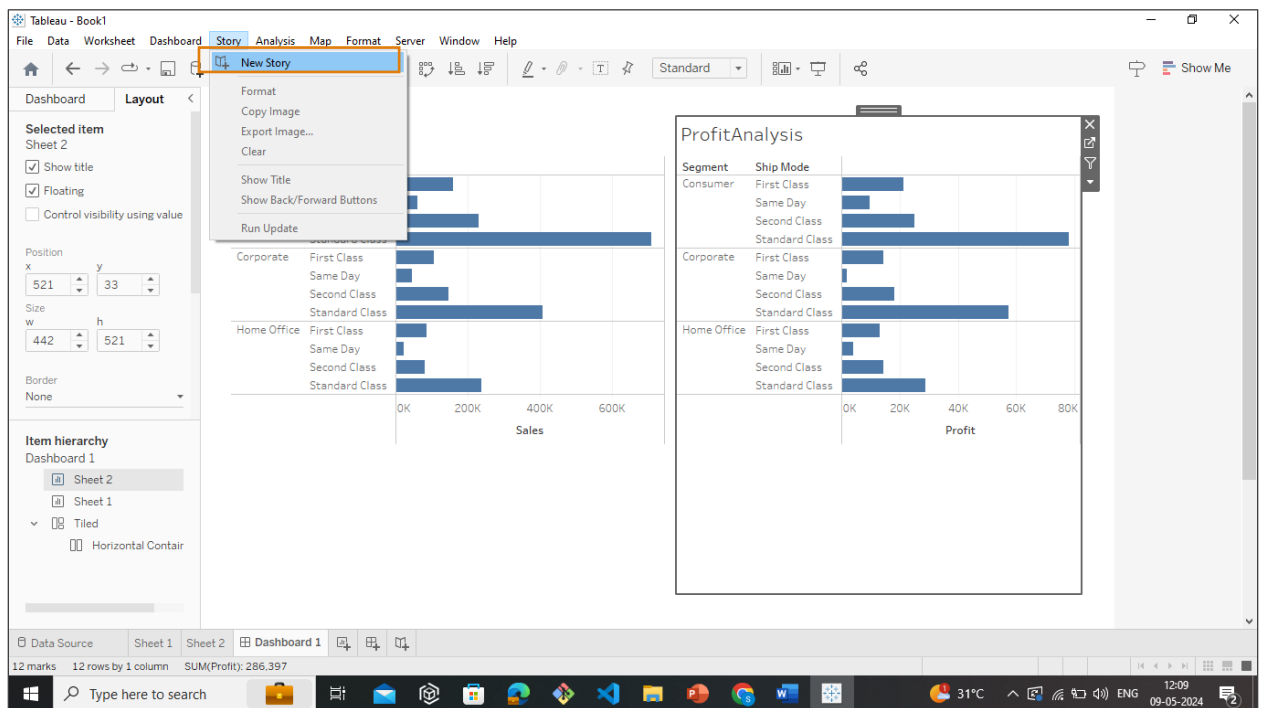


If the sheet is not put inside the container, the aspect ratio (length and width) of the chart may change if the dashboard is viewed on some other device. Hence, it is imperative that the sheets and charts are placed inside the containers.

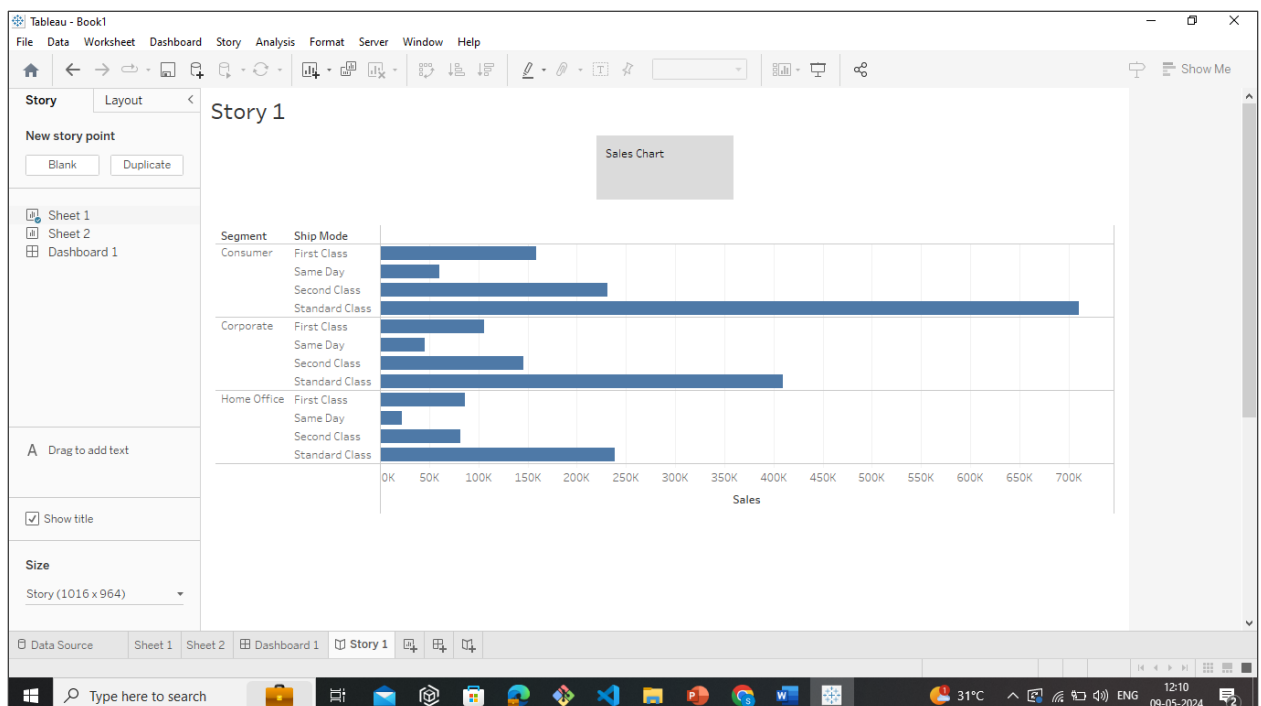
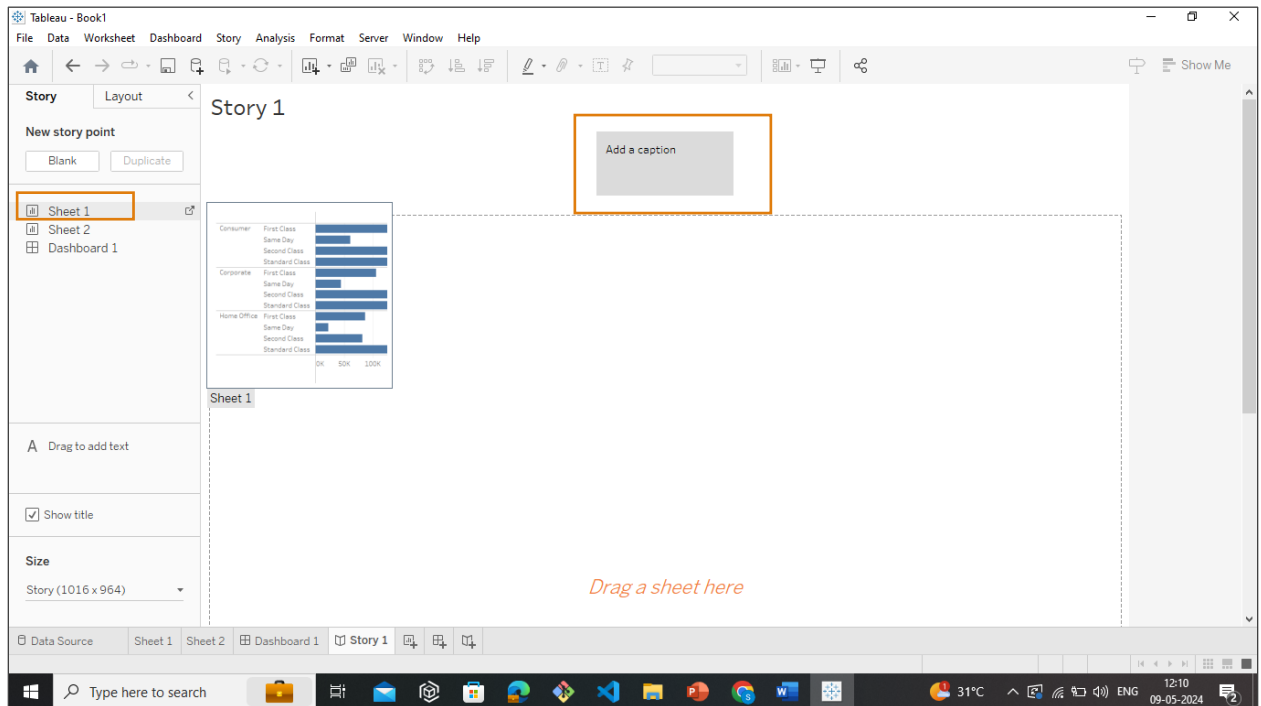
Also, if the sheet is not placed in the container properly, it will not be a child of the horizontal container in the item hierarchy of the layout section.

Step 3: Create a Story

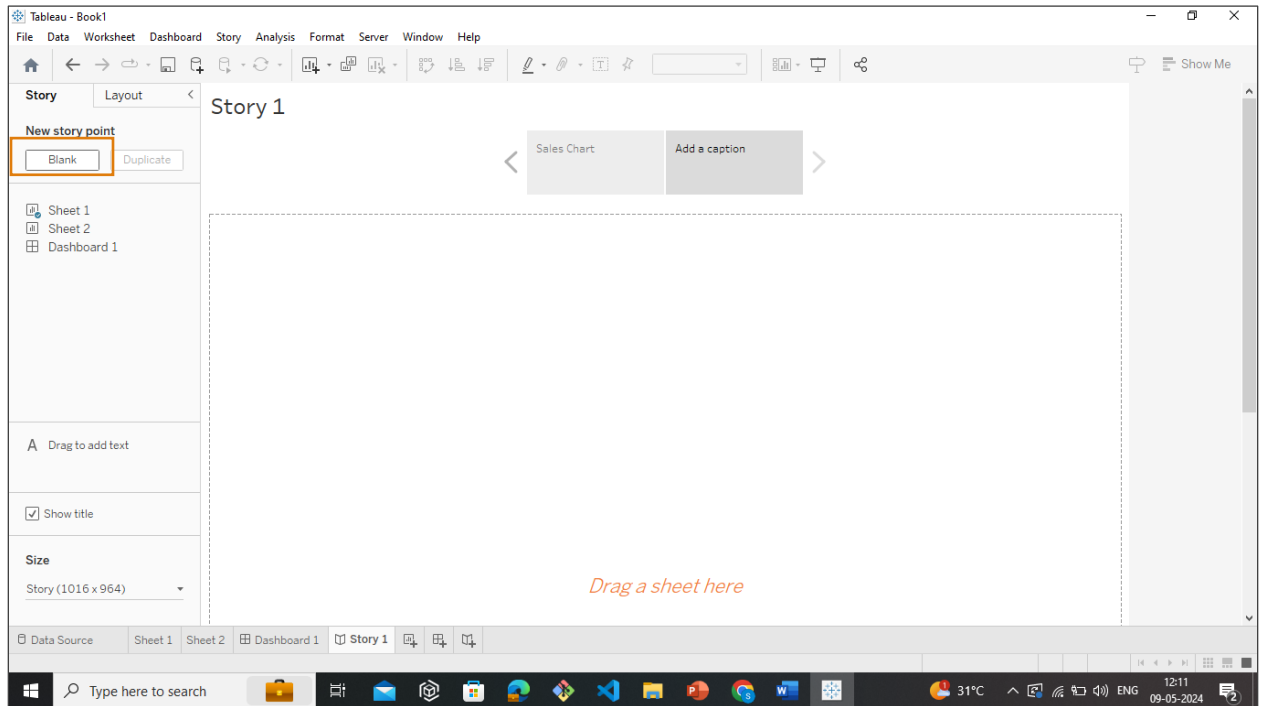
3.1 Click on the **Story** on the top and select **New Story** from the menu below



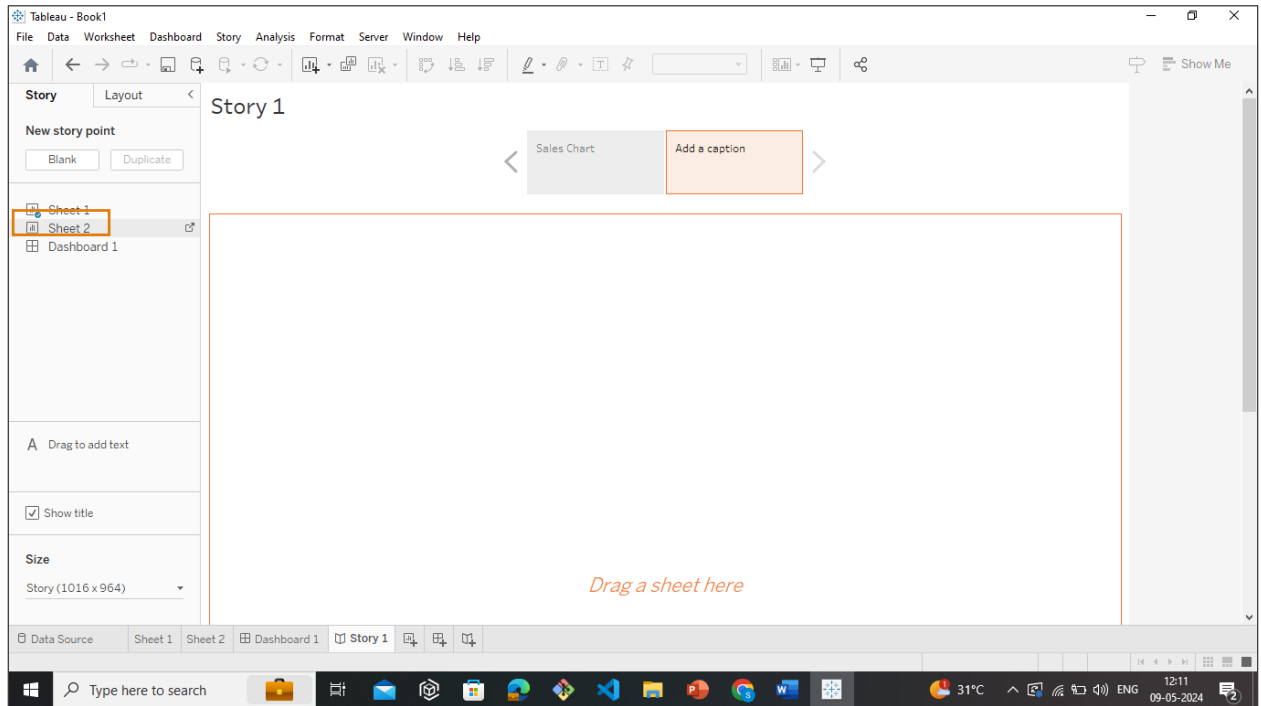
3.2 Drag **Sheet 1** on the story interface and add a caption as **Sales Chart**

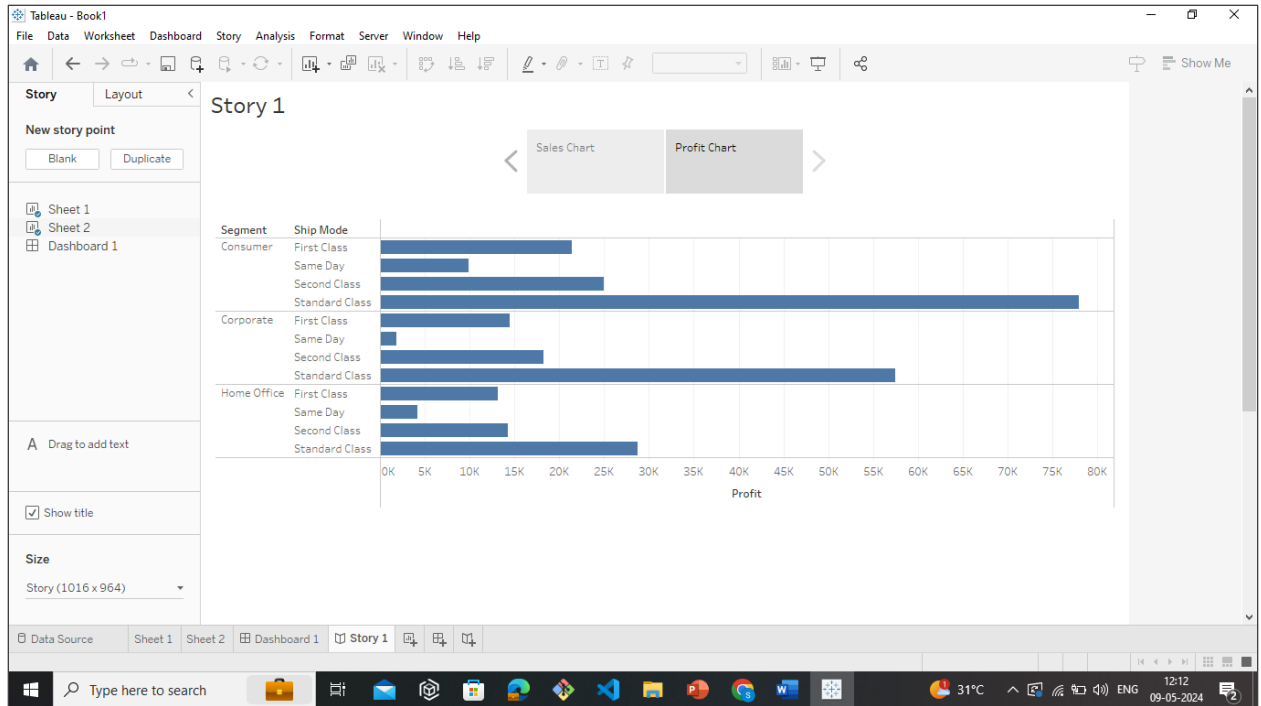


3.3 Click on **Blank** to add the sequence of the story

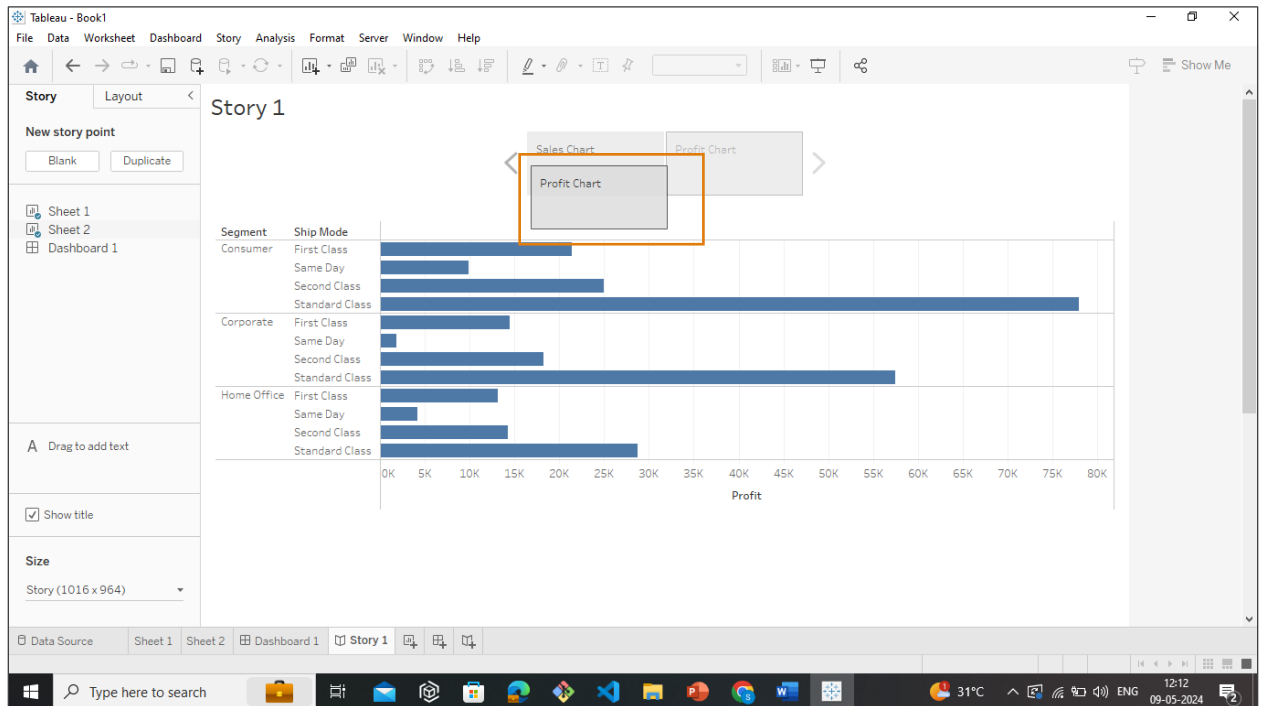


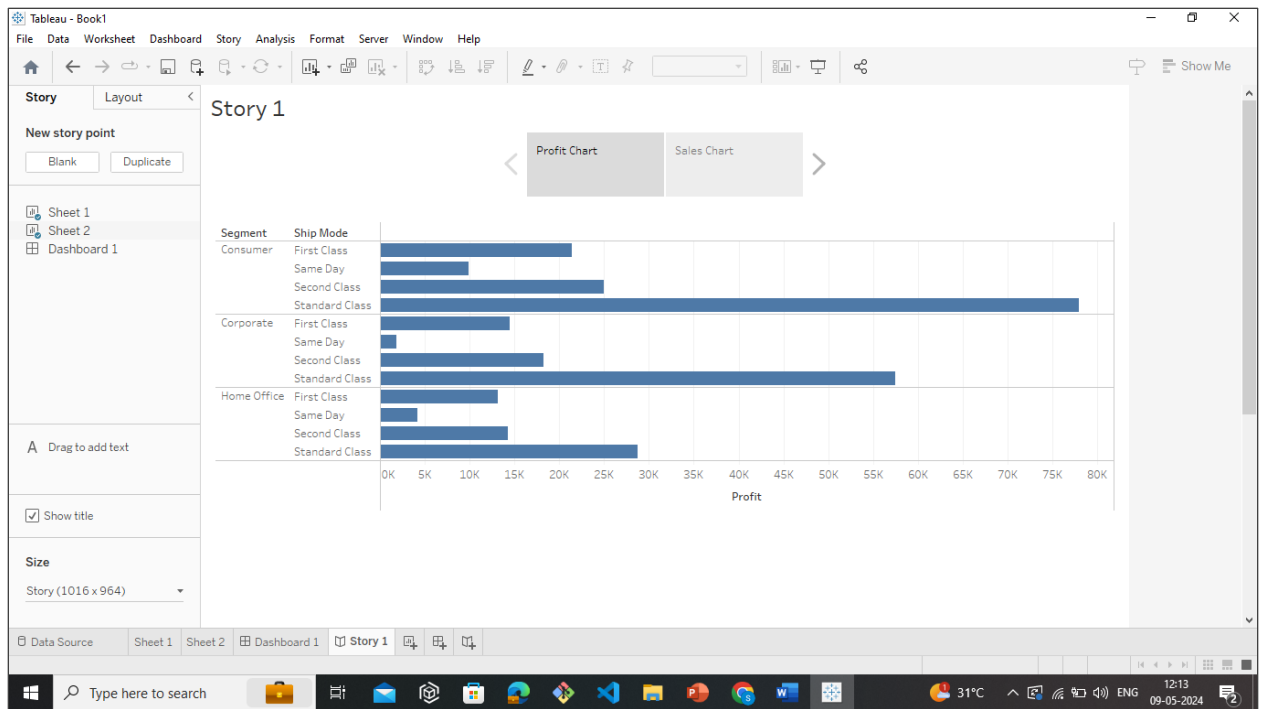
3.4 Now drag **Sheet 2** on the story interface and add a caption as **Profit Chart**



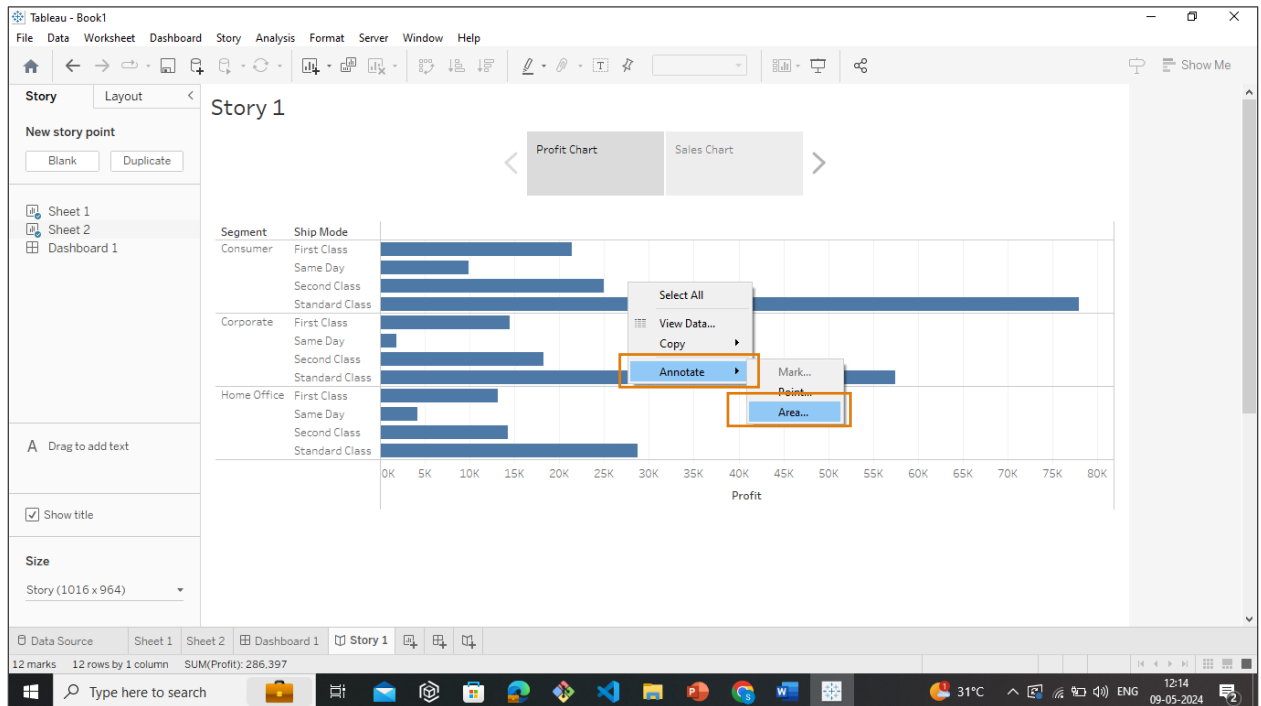


3.5 Change the sequence of the story points by dragging them to change the order as shown below

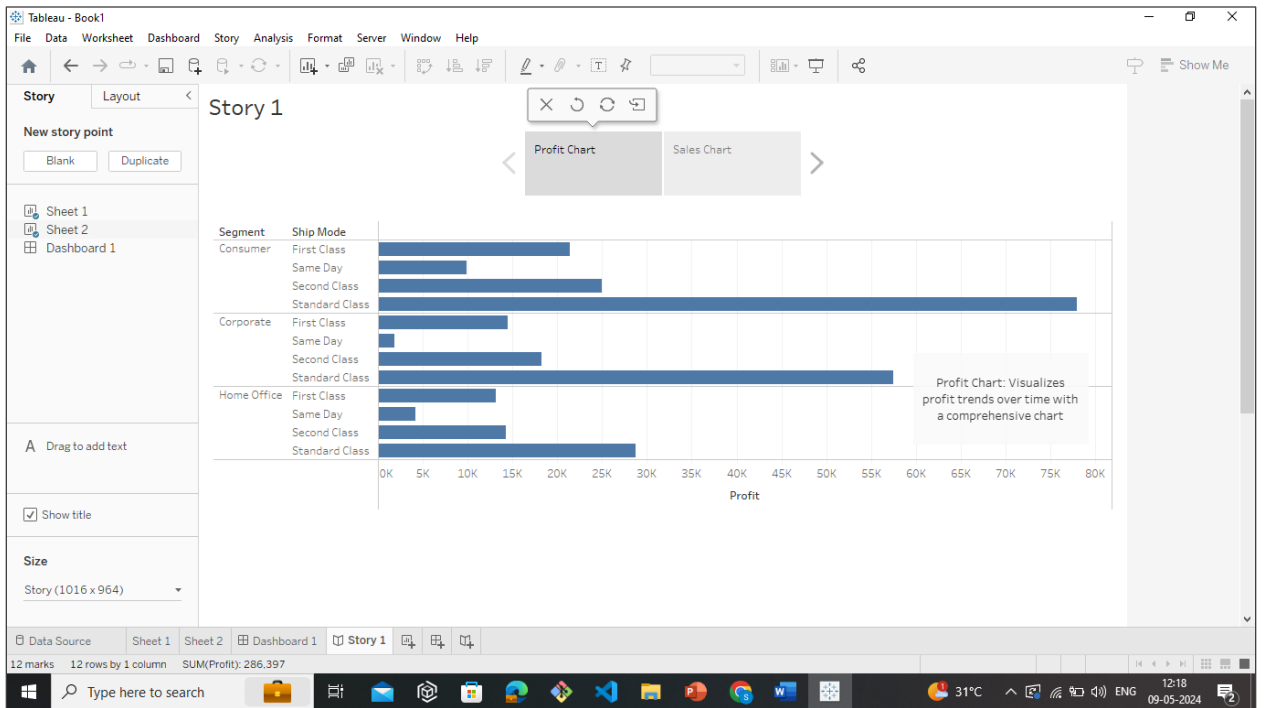
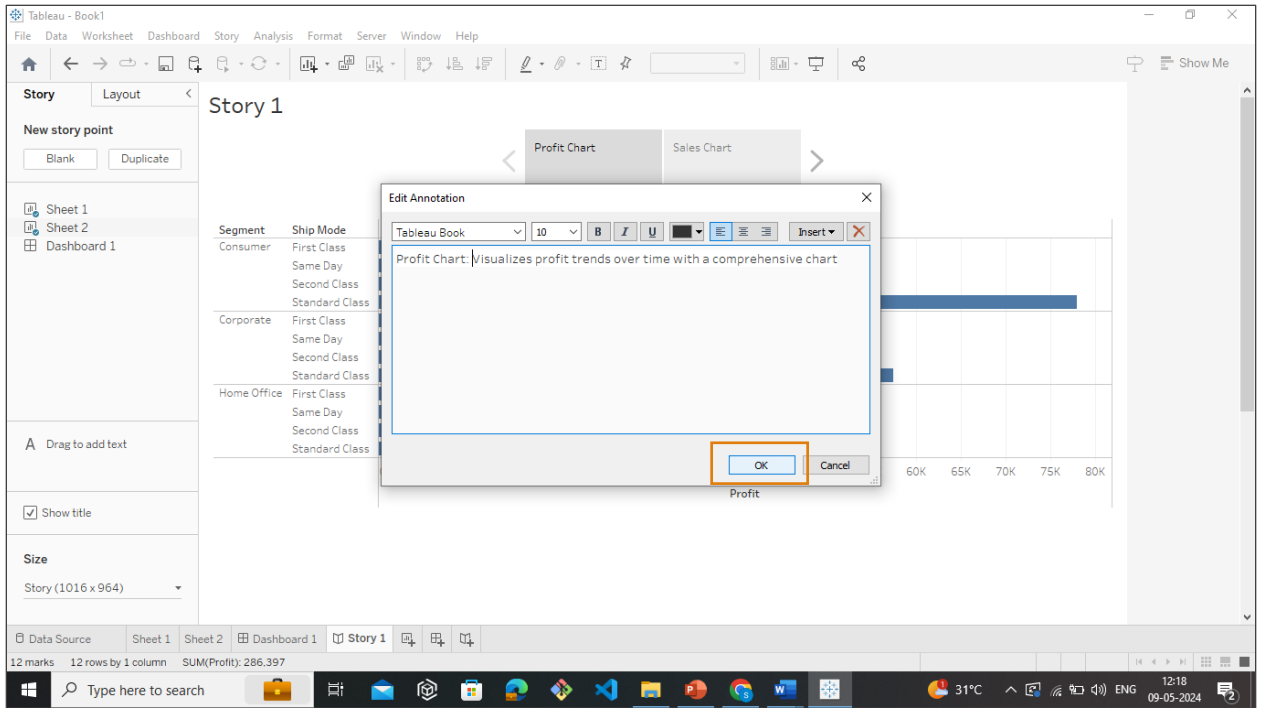




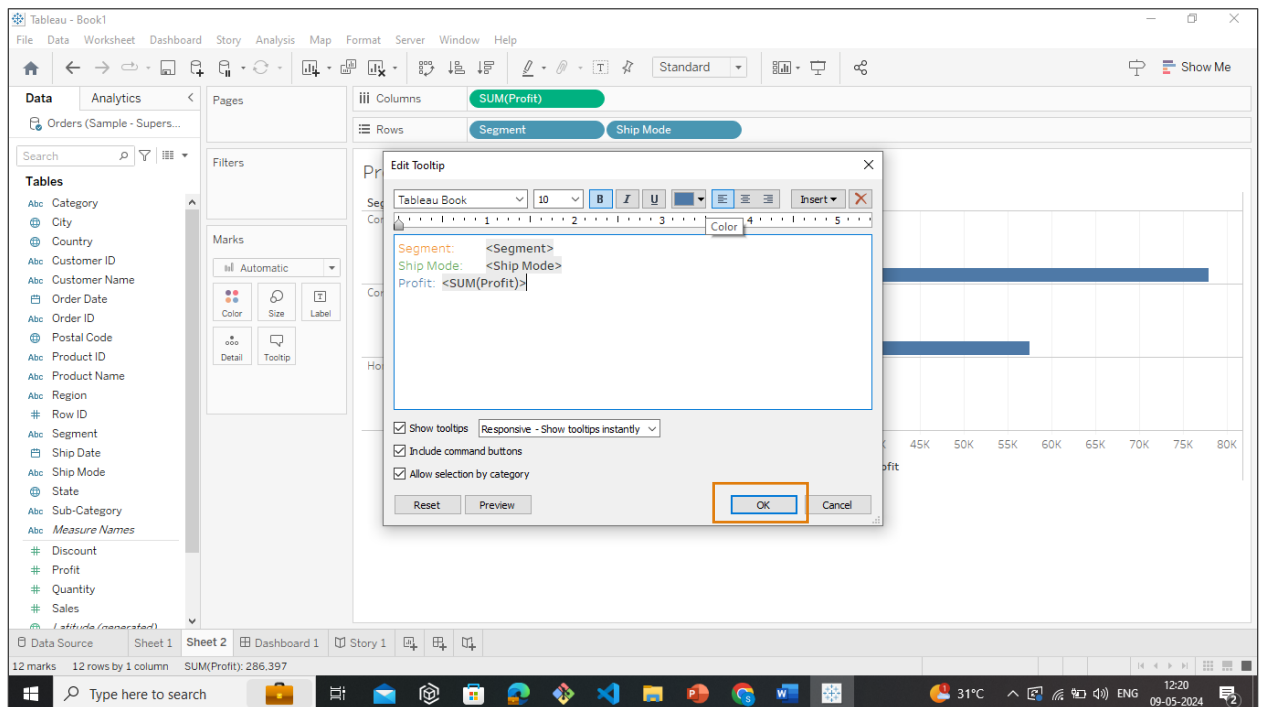
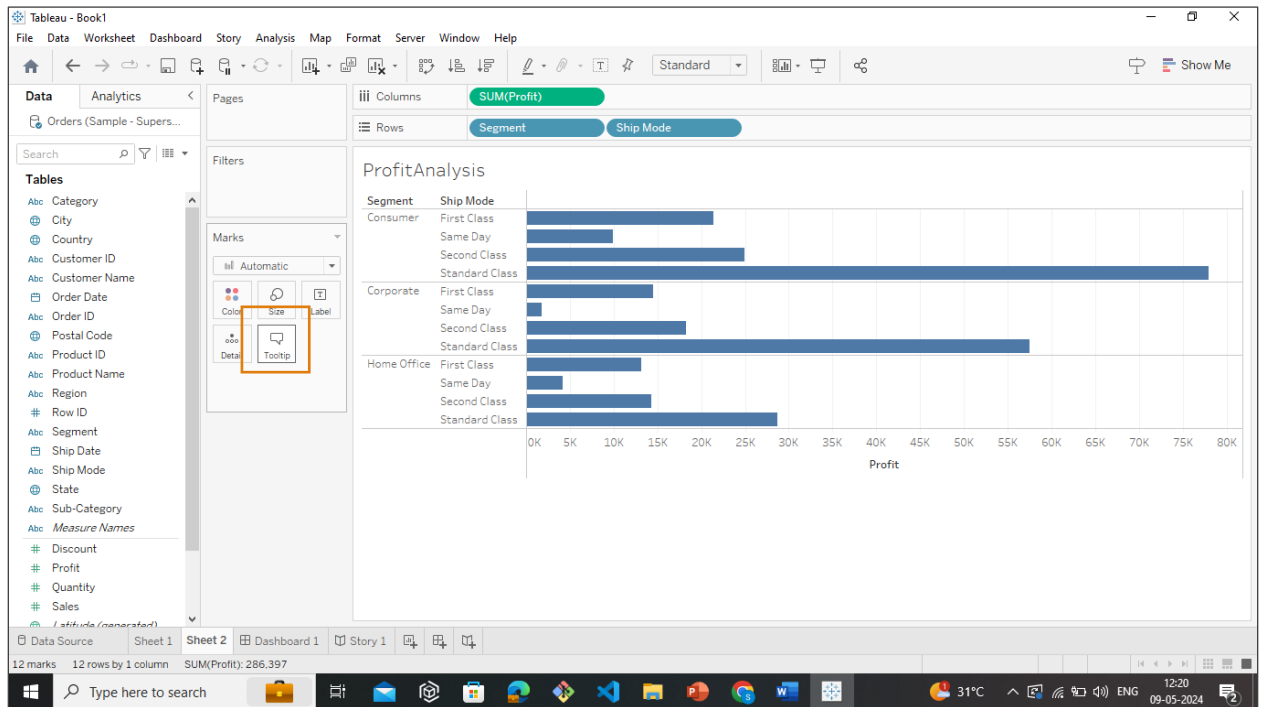
3.6 Right-click on the chart and select **Annotation**, then select Area (as shown below) to add the annotations to the charts on story point

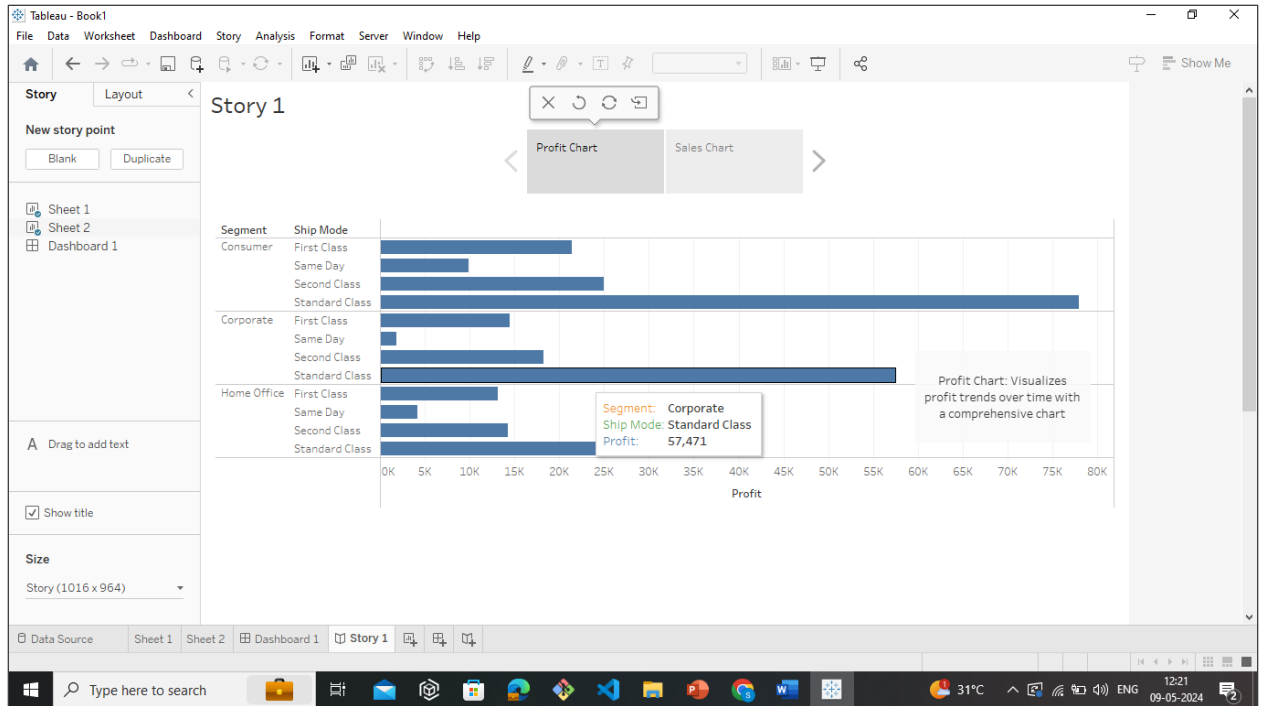


3.7 Add the text and click **Ok**

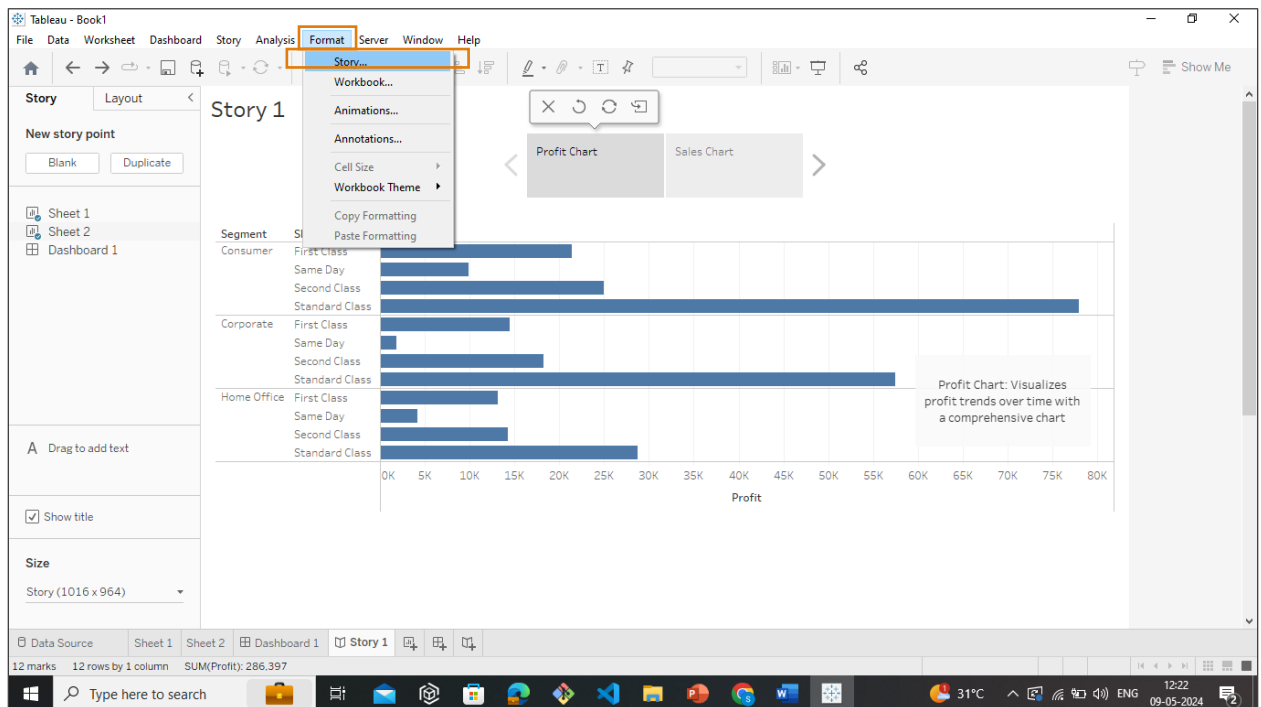


3.8 Click on the **Tooltip** and edit the text for more interactivity. Click **Ok**.

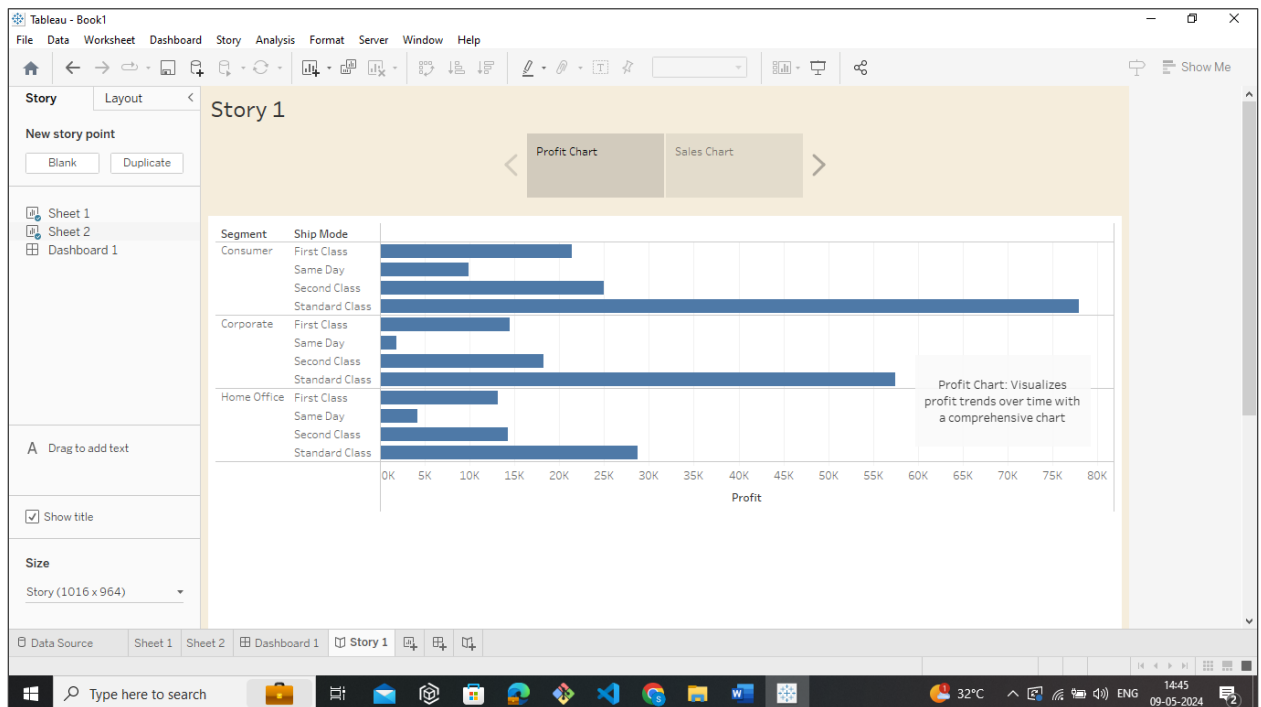
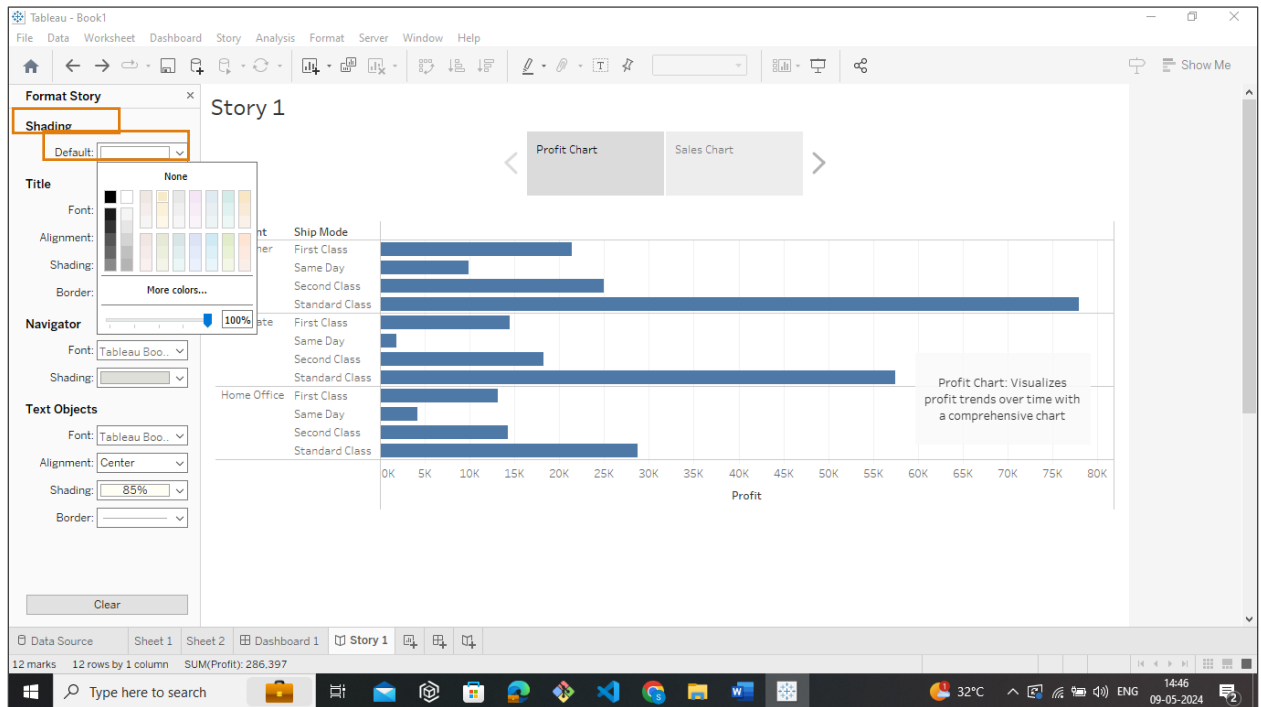




3.9 Click on **Format** and select **Story**



3.10 Under **Shading**, click on **Default** to change the background color



With these steps, we have successfully created a dynamic story to analyze sales and profit across segments and ship modes, effectively communicating insights.