Tableau Workshop Day 2 - Morning Session

Dataset: Changes in the British Industry

Demo on Creating Maps

Sheet 2: Map

Create a map of the percentage of change in the industry by city

Step 1: At the bottom left corner of the screen, click on the 'New Worksheet' button.
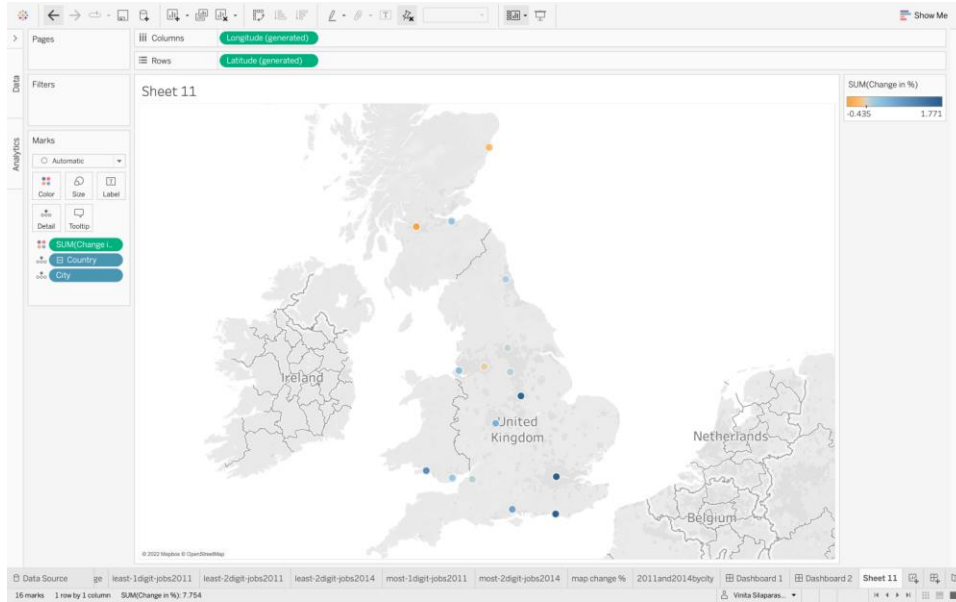
Step 2: Rename the worksheet to make it easier to recognize.

Step 3: Create a basic map

Under the table '1 digit':

- Double click the 'Country' field, located in the data pane on the left.
- Now, double click the 'City' field, located in the data pane on the left.
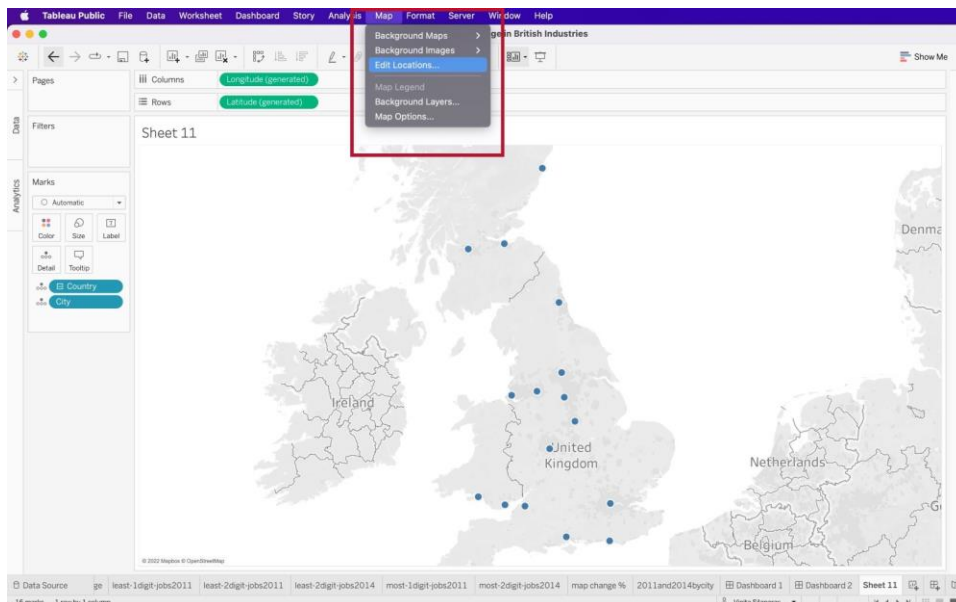- Next, drag the '% Change' field exactly onto the 'Color' card in the 'Marks' shelf.
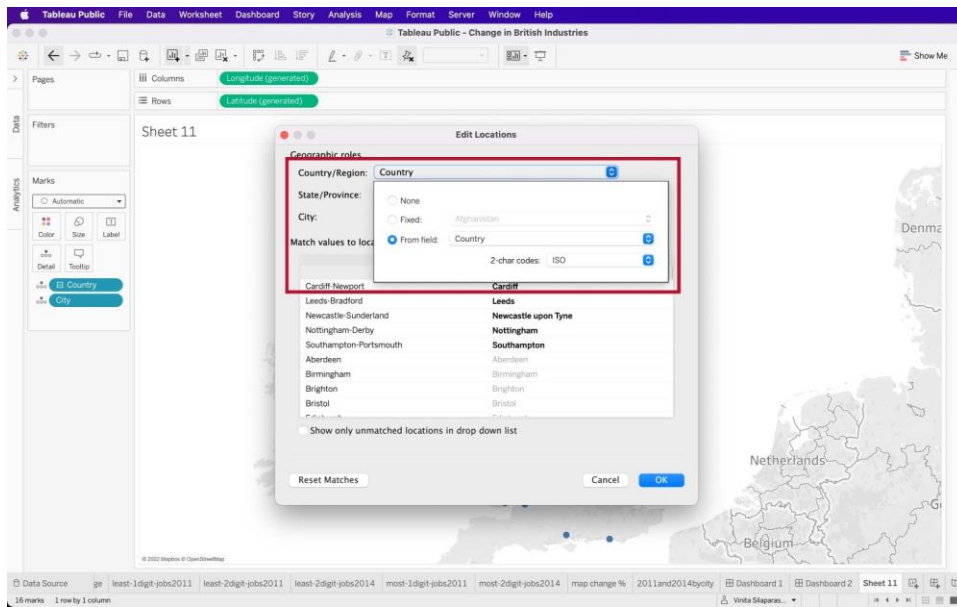
You should see a map like this:

Here, the field '% Change' has been renamed to 'Change in %'.
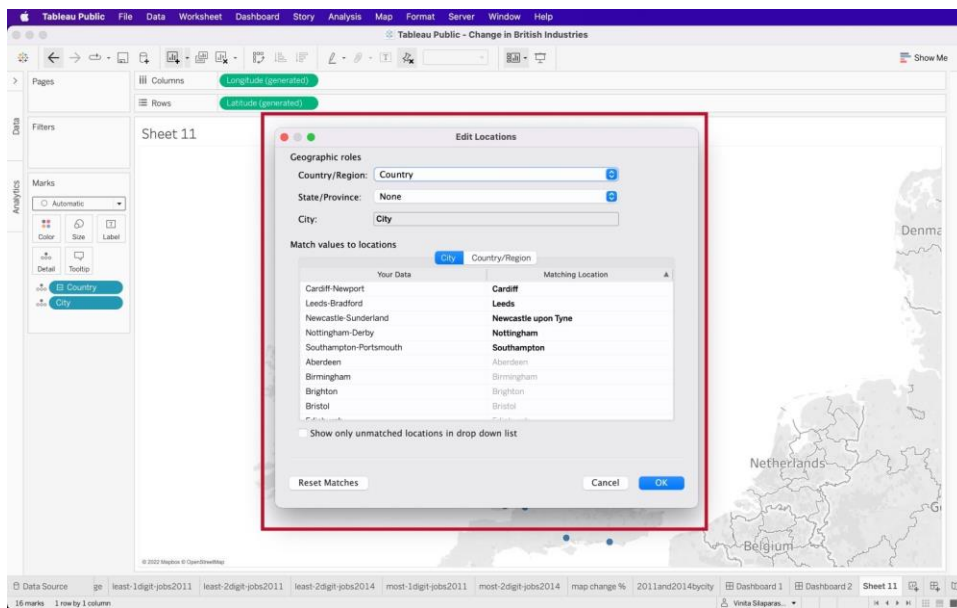
Step 4: Manually change map settings

Sometimes Tableau has trouble correctly identifying places. This is when we correct errors in the setting.
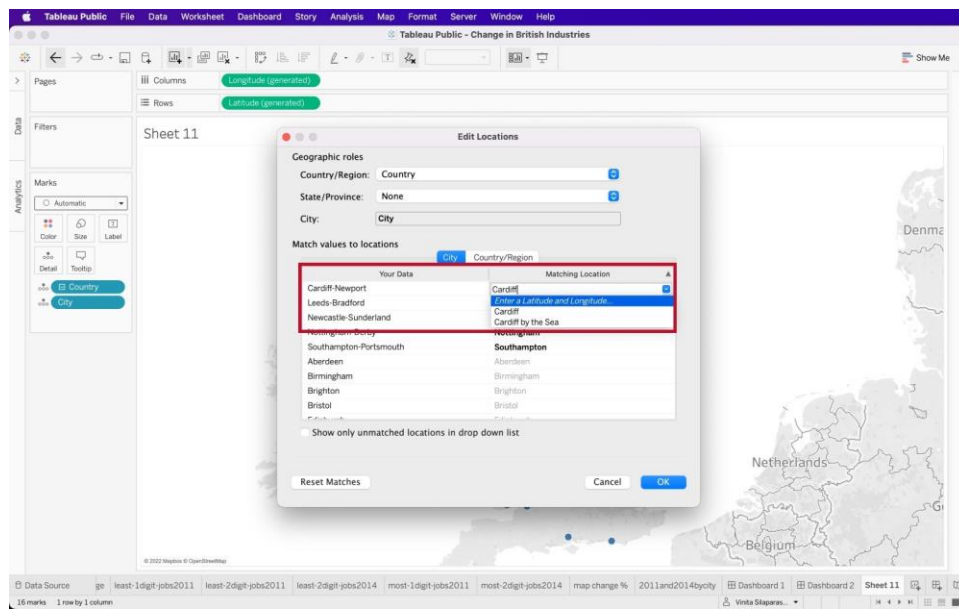

- From the menu bar, select 'Map'
- From the drop-down menu select 'Edit locations...'

- In 'Country/Region' section, you could select 'Fixed' and then select 'United Kingdom'.
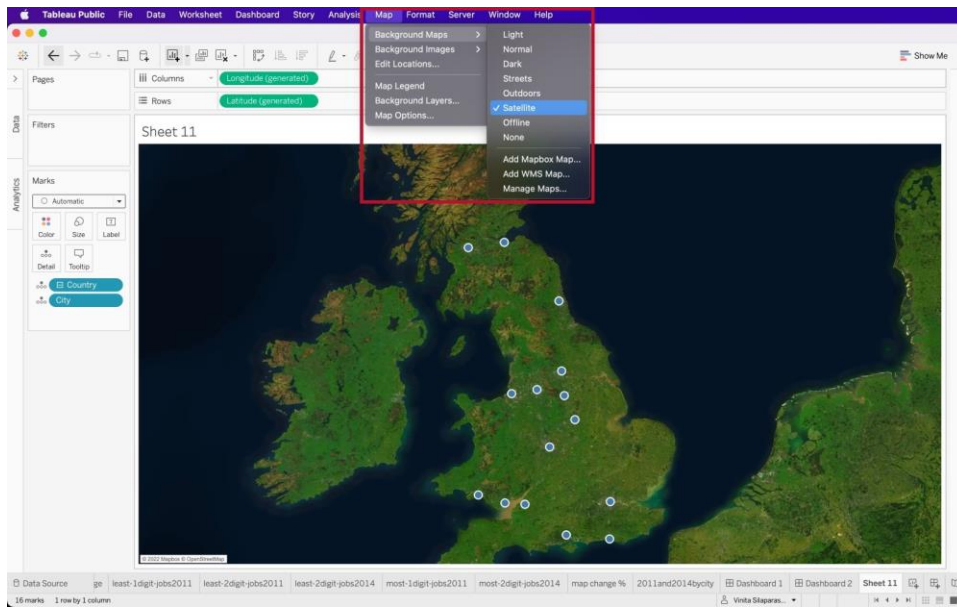- Alternatively, you could select 'From field' and then select 'Country'.

- We don't need to change the 'State/Province'.

Under 'City' some of the cities may not be automatically recognized by Tableau.

- Select the names of the cities which are not recognized.
- From the drop-down menu, select the closest option that represents the unrecognized city.
- When you are done, click 'Okay'.
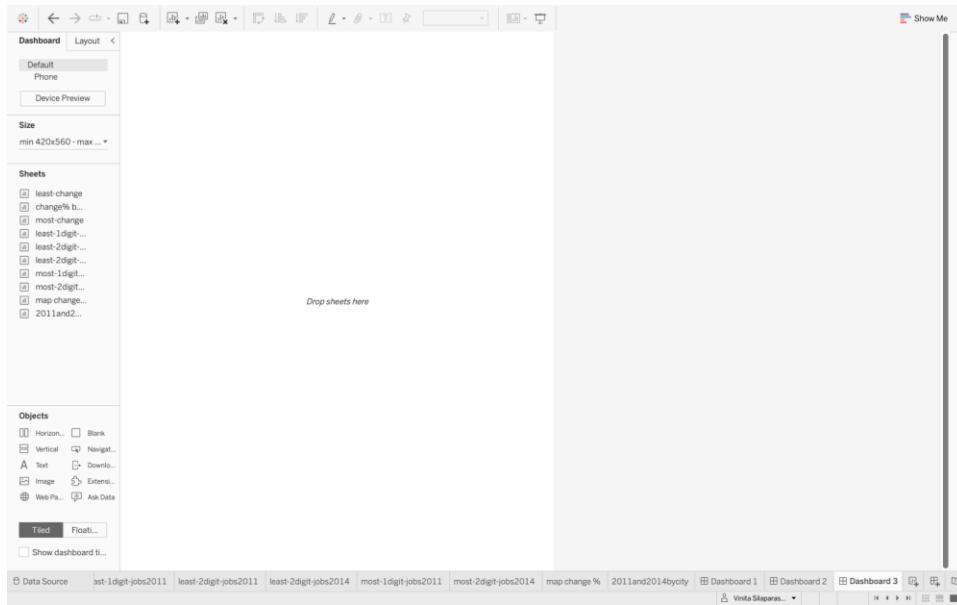
Step 5: Change map type

- From the menu bar, select 'Map'
- From the drop-down menu select 'Background Maps >'
- Select the map that you like

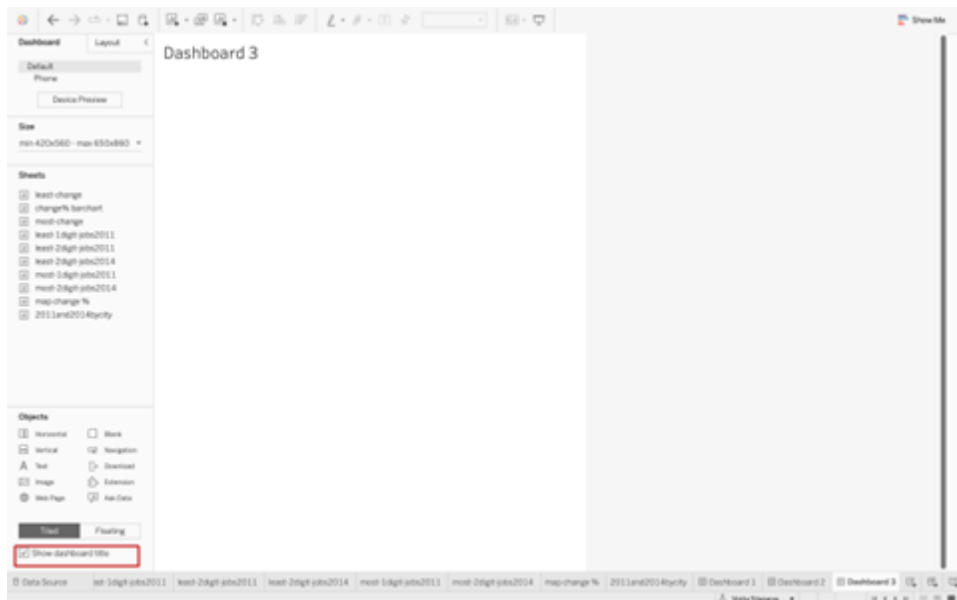You now have your second visual. Let's put them together in a dashboard.

Dashboard
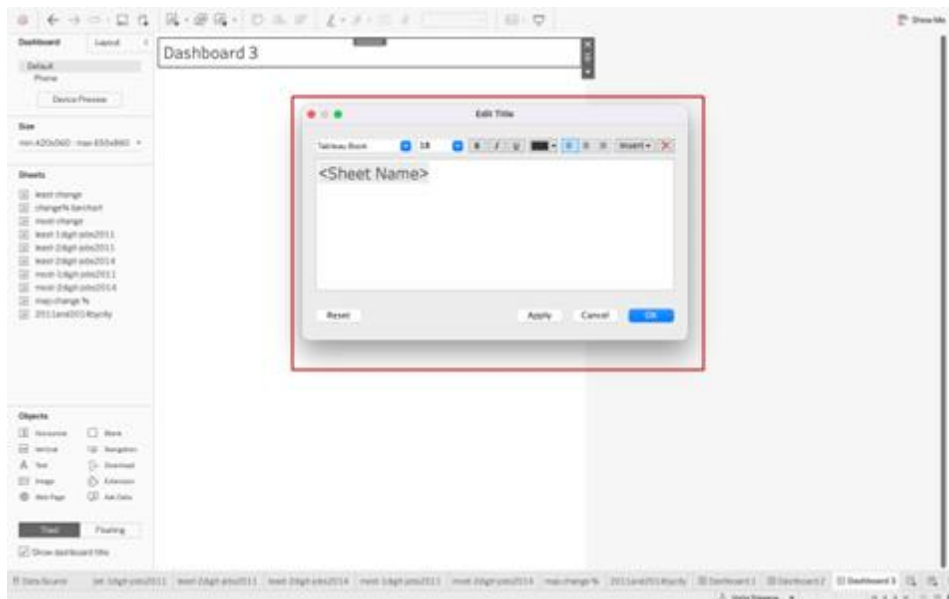
Step 1: Open a new dashboard

- At the bottom left corner of the screen, click on the 'New Dashboard' button.
- You should see a screen like this:
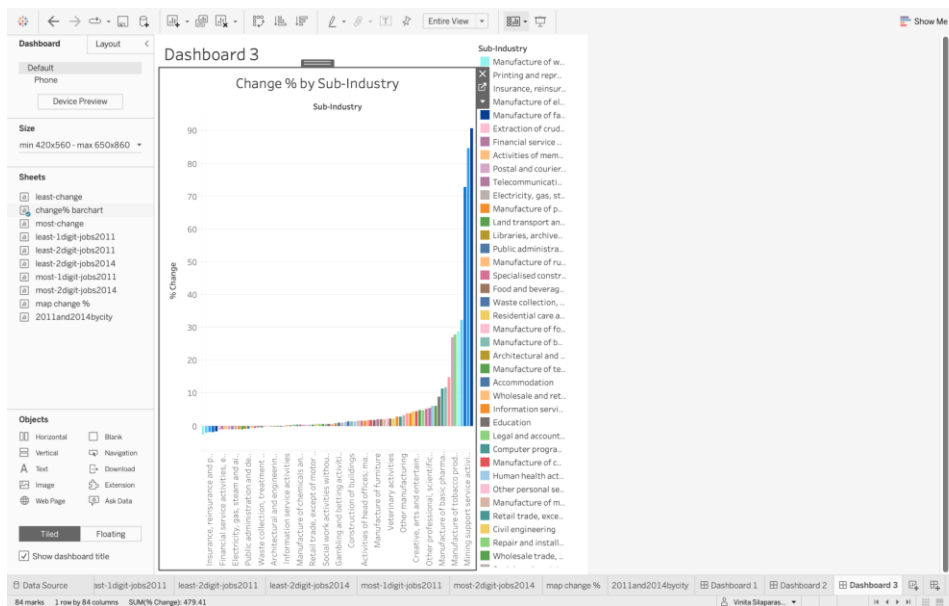
Step 2: Add a heading

- From the bottom left, click the 'Show dashboard title' option.
- A text box with A default title will appear.

- Double click the title text box.
- In the pop-up window, erase '<Sheet Name>' and type in the name that you want to use.
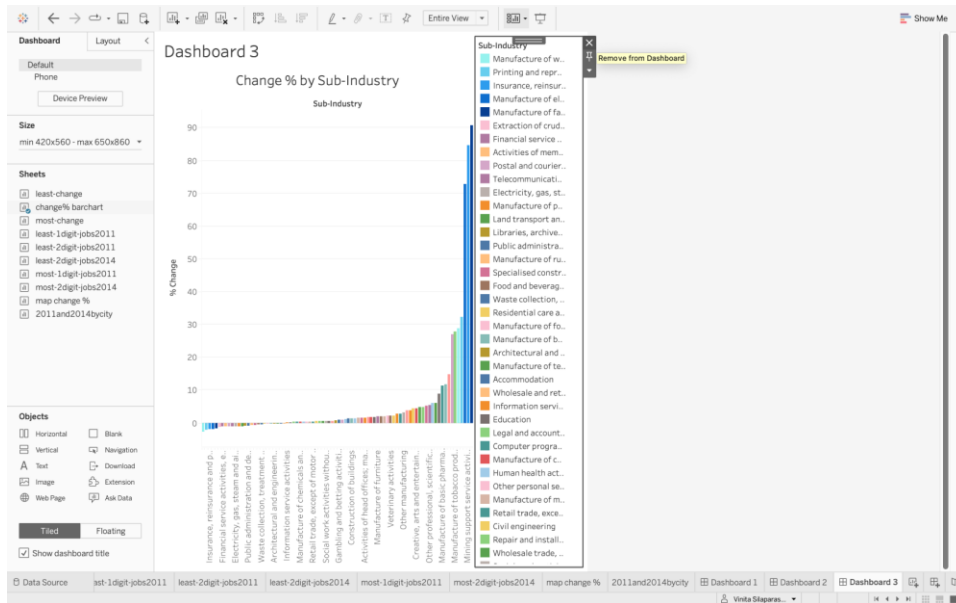- Click 'Okay'

Step 3: Add worksheets

- Drag The bar chart from the left-hand side to the dashboard. You should now have the bar chart and its corresponding legend in the dashboard, as seen below.
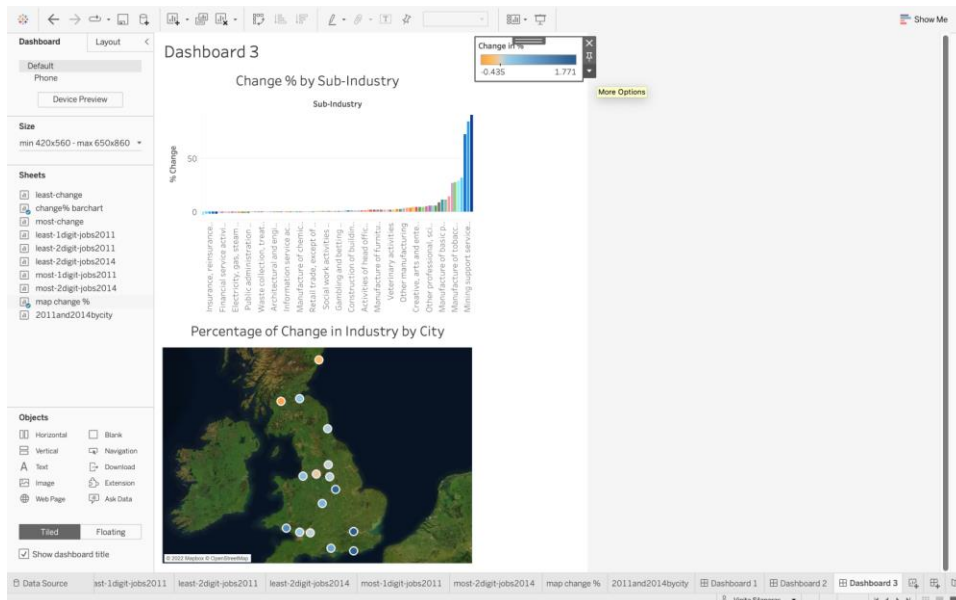
Here the legend is redundant because the bar chart already displays the names of each sub-industry.
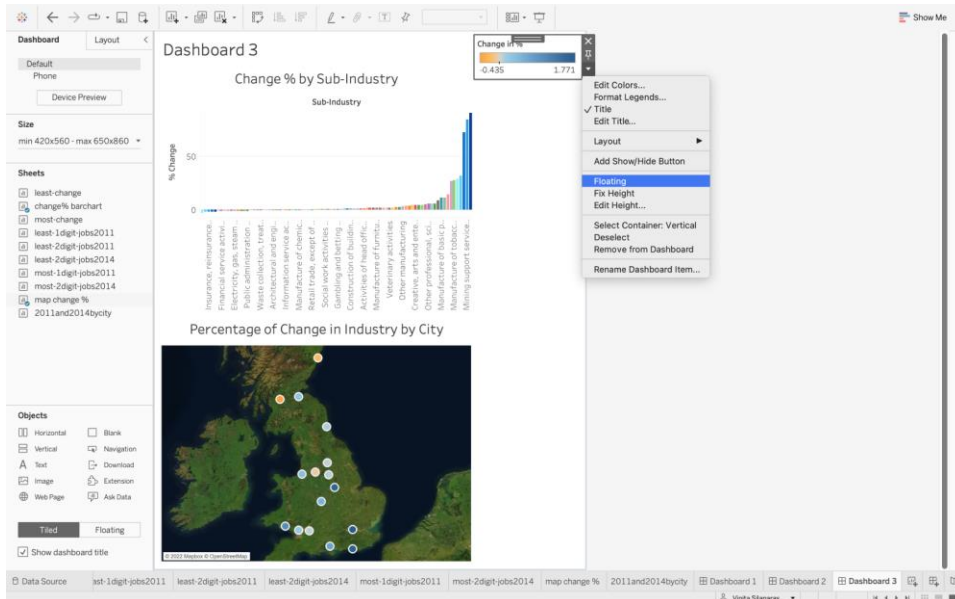
Let's remove it.

- Place your mouse over the legend. To the top right, you will see 3 buttons.
- Click the button with an 'X' to remove the legend from the dashboard.
- Now drag the map from the left-hand side to the bottom of the dashboard. The area will turn grey to indicate that the map will be placed there.
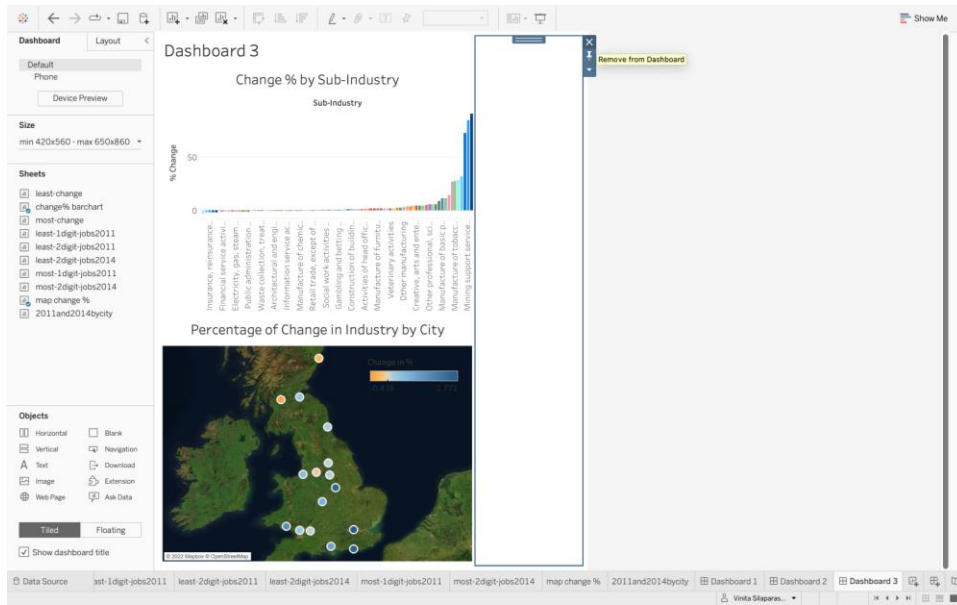
The map is placed well, but its corresponding legend is now in the top right corner of the dashboard. It would be more useful if placed on the map.

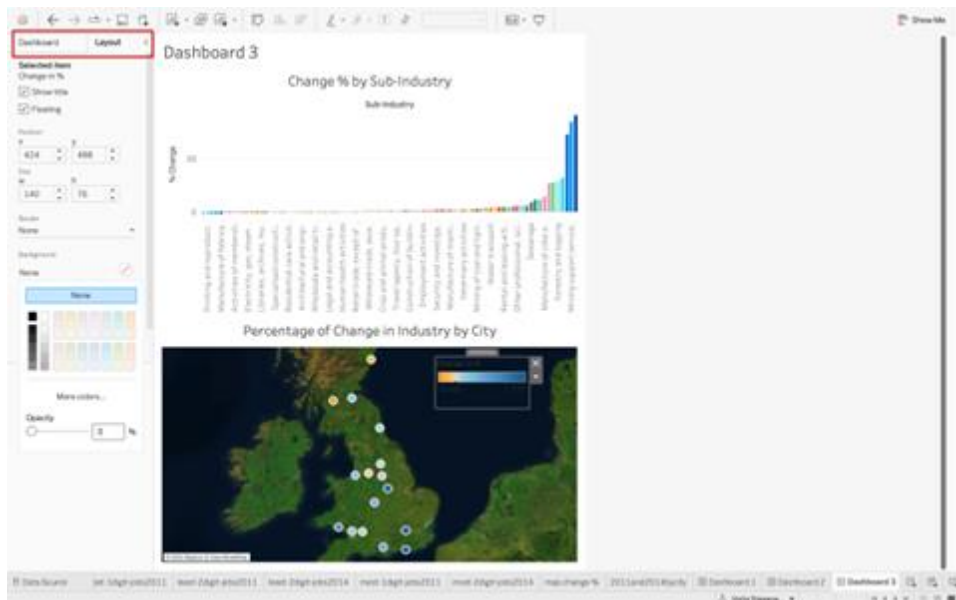To do this, let's convert the legend to a 'floating' object.

- Hover the mouse over the map legend and you will see 3 buttons appear to the top right corner.
- Click the icon with the arrow pointing down.

- From the drop-down menu, select 'Floating'.
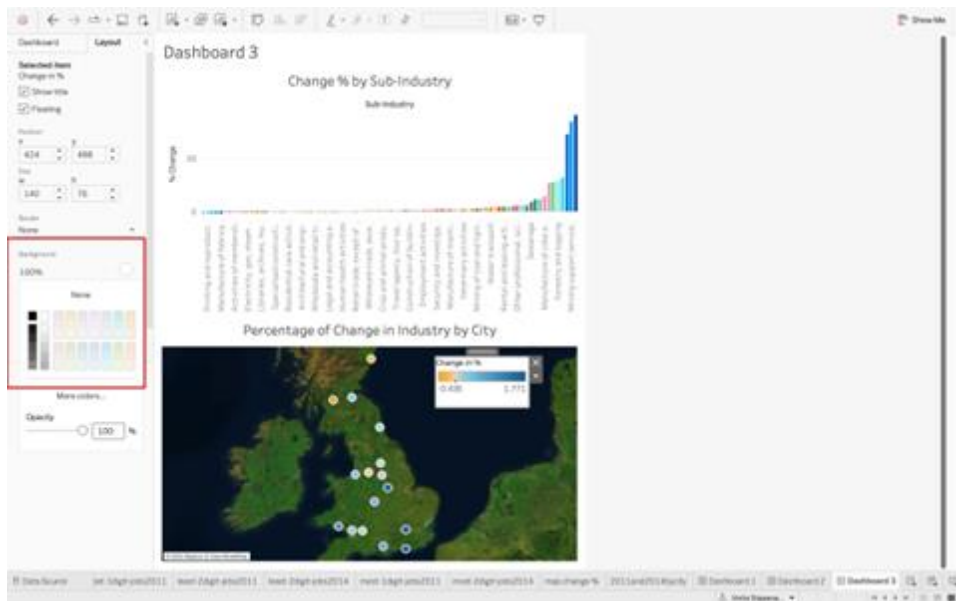- Drag and drop the legend over to the top right corner of the map.

We are left with an empty space where the legend used to be. To remove it, just select 'X'.

Now the legend for the map is in the right position, but we can't see the text.

Let's change the color of the background for the map legend.

- Select the 'Layout' tab, as seen above.

- Under 'Background', select white.

Optionally, you could add a border to the bar chart. Then you could end up with a dashboard like this: