# Life History Project
TABLEAU EXERCISES
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Exercise 1: Import Data

1. Click on **Connect > To a File > Text File**
2. Select the **metadata csv file**.
3. The **Data Source** tab now displays the contents of your spreadsheet.
4. Clicking on the **icon over a column** allows you to change the **data type**.
5. Clicking the **down arrow over a column** allows you to **rename the variable**.
6. Click on the **Sheet 1** tab at the bottom.

Tableau Interface
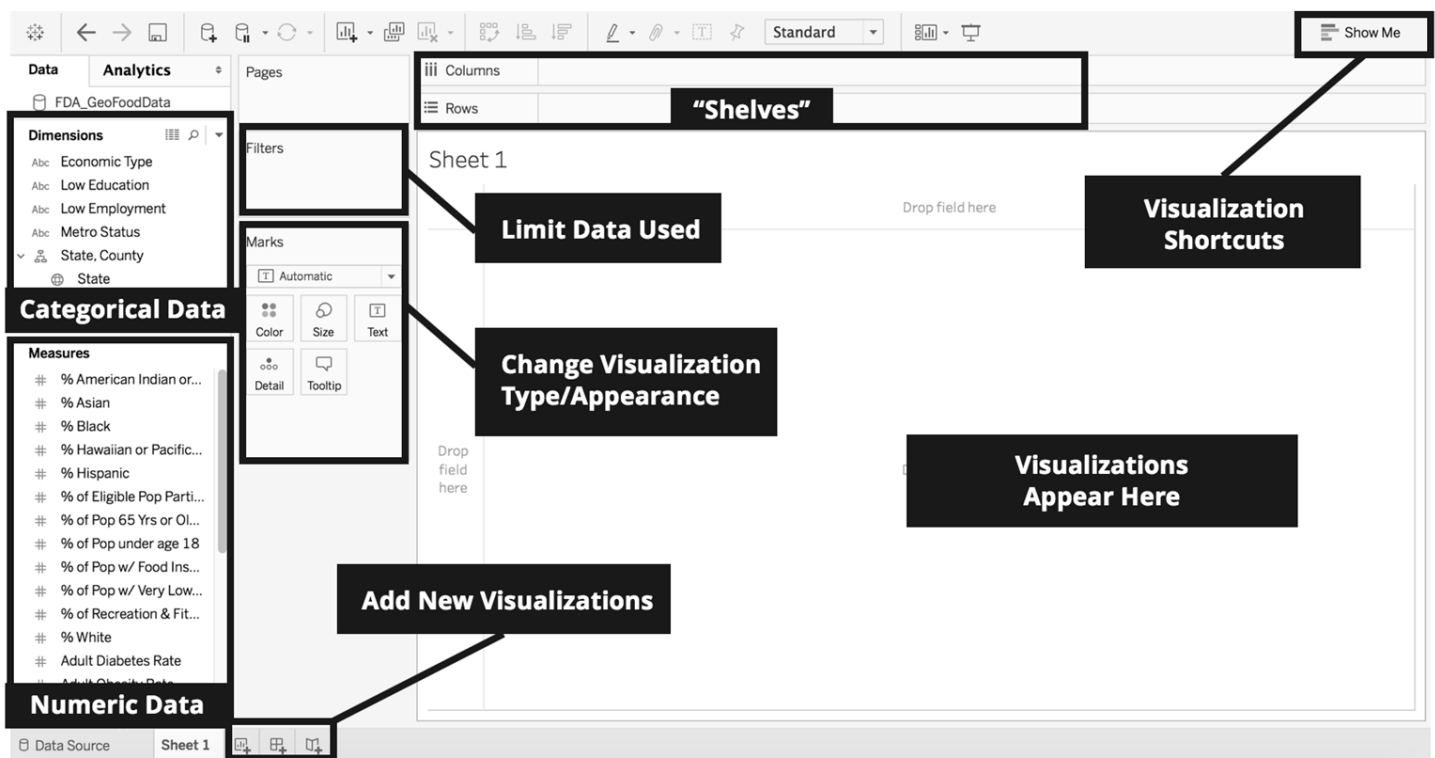
Exercise 2: Create a Bar Chart

1. Drag **Name of Writer** from the **Tables** list to the **Columns** shelf.
2. Find *life history metadata.csv (Count)* toward the bottom of the **Tables** list. Drag it to the **Rows** shelf.

5. Roll over the bars and look at the **Tooltip** to see how many interviews were written by each writer.

6. Let's use **color** to show **more information**. From the **Tables** list, drag **Interviewee Race/Ethnicity** into the **Color** box in the **Marks** pane. We have created a **stacked bar chart**.

7. Stacked bar charts can be difficult to read. From the **Tables** list, drag **Interviewee Race/Ethnicity** into the **Rows** shelf, to the right of **Name of Writer**. Now we have a **clustered bar chart**.

8. What if we want to know what **percentage of the overall interviews** were written by each writer? In the **Columns** shelf, right click on **CNT(life history metadata.csv)** and select **Quick Table Calculation > Percent of Total**. Roll over the bars to look at the **tooltips** again.

9. Let's label the percentages on the bar chart. Drag *life history metadata.csv (Count)* from **Tables** to the **Label** box in the **Marks** pane.

10. In the **Marks** pane, right click on **CNT(life history metadata.csv)** and select **Quick Table Calculation > Percent of Total**.

11. **Right click** on the **Sheet 1** tab at the bottom and select **Rename Sheet**. Change it to **Interviews**.

Exercise 3: Create a Map

2. Click on **County** in the **Tables** list.

3. Hold down the **CTRL key** and click on **Number Of Pages Of Interview**. **Both pills** should now be highlighted.

4. Click on the **Show Me** tab in the upper right and select **Filled Maps** (the one next to the bubble map outlined with an orange box).

5. Click on the **grey button** labeled **14 unknown** at the bottom right of the map and select **Edit Locations**.

6. At the **top** of the pop-up window, change **State/Province** to **Fixed: North Carolina**.

7. **Right click** on the **Sheet 2** tab at the bottom and select **Rename Sheet**. Change it to **Counties**.

Exercise 6: Create a Dashboard

3. On the left is a menu for **Size**. Click on it to get a pop-up box.

4. At the very top of the pop-up box is a **dropdown menu**. Click on it and select **Automatic**.

5. Drag **Counties** from the **Sheets** pane on the left into the **blank area** at the center.

6. Drag your **Interviewers** sheet over the map, but **don't release the mouse button**. Watch the **highlighted areas** on the dashboard. **Position the sheet to the right** of your map.

7. Click on each that is now in your dashboard. Notice that a **grey border** appears around it. Notice that there are **tiny icons** at the top of the grey border. Notice that there is also a **small tab with white lines running through it** at the top of the grey border.

8. Notice that your **legends and filters** appear on the dashboard with your charts. They are located in the **column on the right**.

9. Click on the **Number Of Pages Of Interview legend**. **Click and drag the small tab** that appears at the top of the grey border. **Position the legend below the map**.

10. Do the same with the **Interviewee Race/Ethnicity legend** but position it **below the bar chart**.

11. Position the **Interviewee Current Occupation filter** at the **top of the dashboard**.

12. **Right click** on the **Interviewee Current Occupation filter**. A menu appears. Select **Apply to Worksheets > All Using This Data Source**. Now the filter controls both of the charts on the dashboard.

14. Click on one of the counties in the map. **All data** in the dashboard is now **filtered** based on the county you selected on the map.

15. How can we filter our dashboard by **interviewer**? See if you can figure it out!