Follow-along guide: Craft compelling stories with Tableau

This document includes detailed instructions for how to perform the data visualizations described in the video “Craft compelling stories with Tableau.”

The following guide points out areas of the video that may require adjustment. These resource guides can also serve as a set of usability reminders for you to recall when using Tableau in your future career.

Instructions

Go to https://public.tableau.com/s/

Since you’ve already set up your Tableau Public profile, all you need to do is log in and select **Web Authoring** under **Create** in the navigation bar.

Select the appropriate CSV file provided in the instructions. The dataset you’ll use with this instructional video is: tableau_main_2009_to_2018.csv.

Please be aware that when you download the zip file folder provided, the computer automatically names that zip file folder with a long string of numbers and letters. You have to open that folder and then upload the individual files that are named correctly and match what's shown in the video.

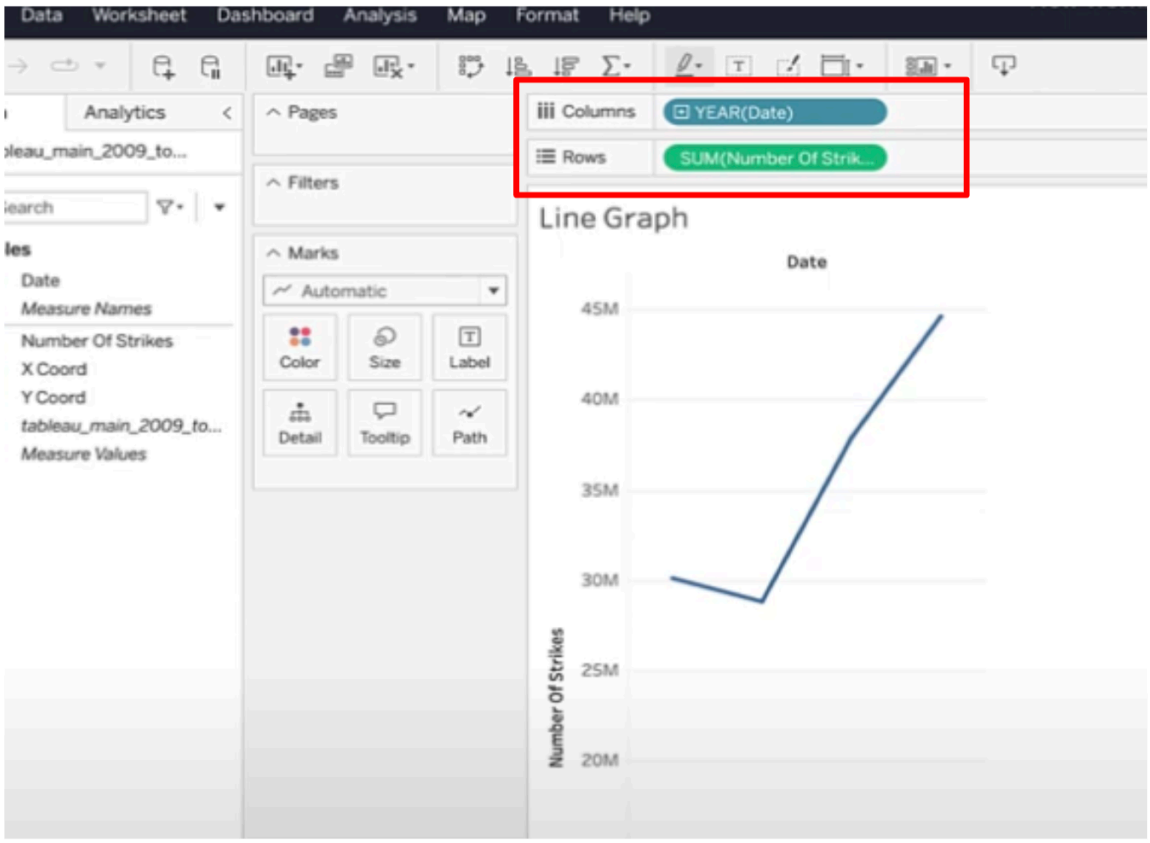
Click on NEW WORKSHEET.

Note: Please allow several minutes for data import into a new worksheet.

Move the blue Date field to the column field.

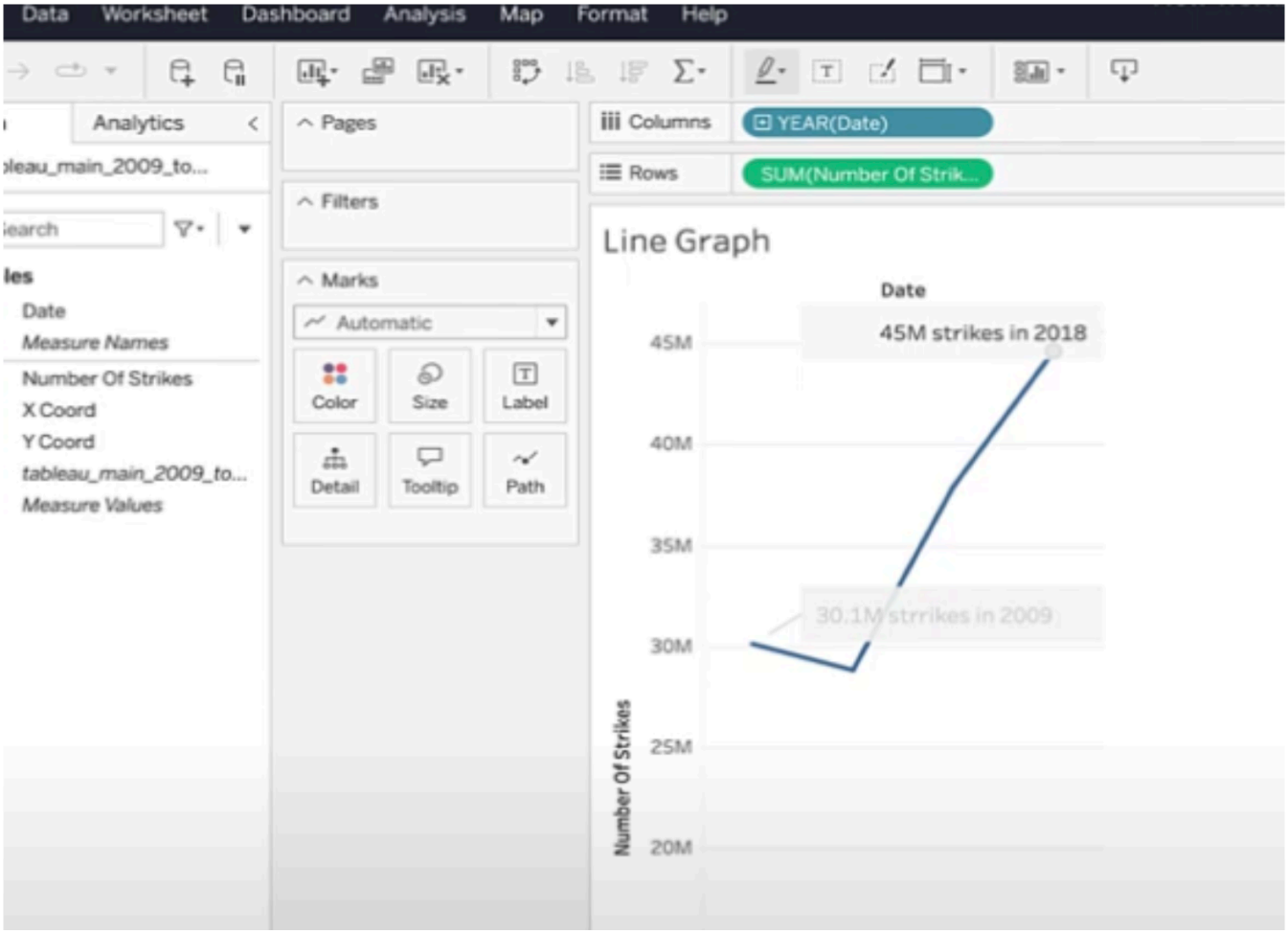
Select YEAR from dropdown.

Move NUMBER OF STRIKES to the row field.



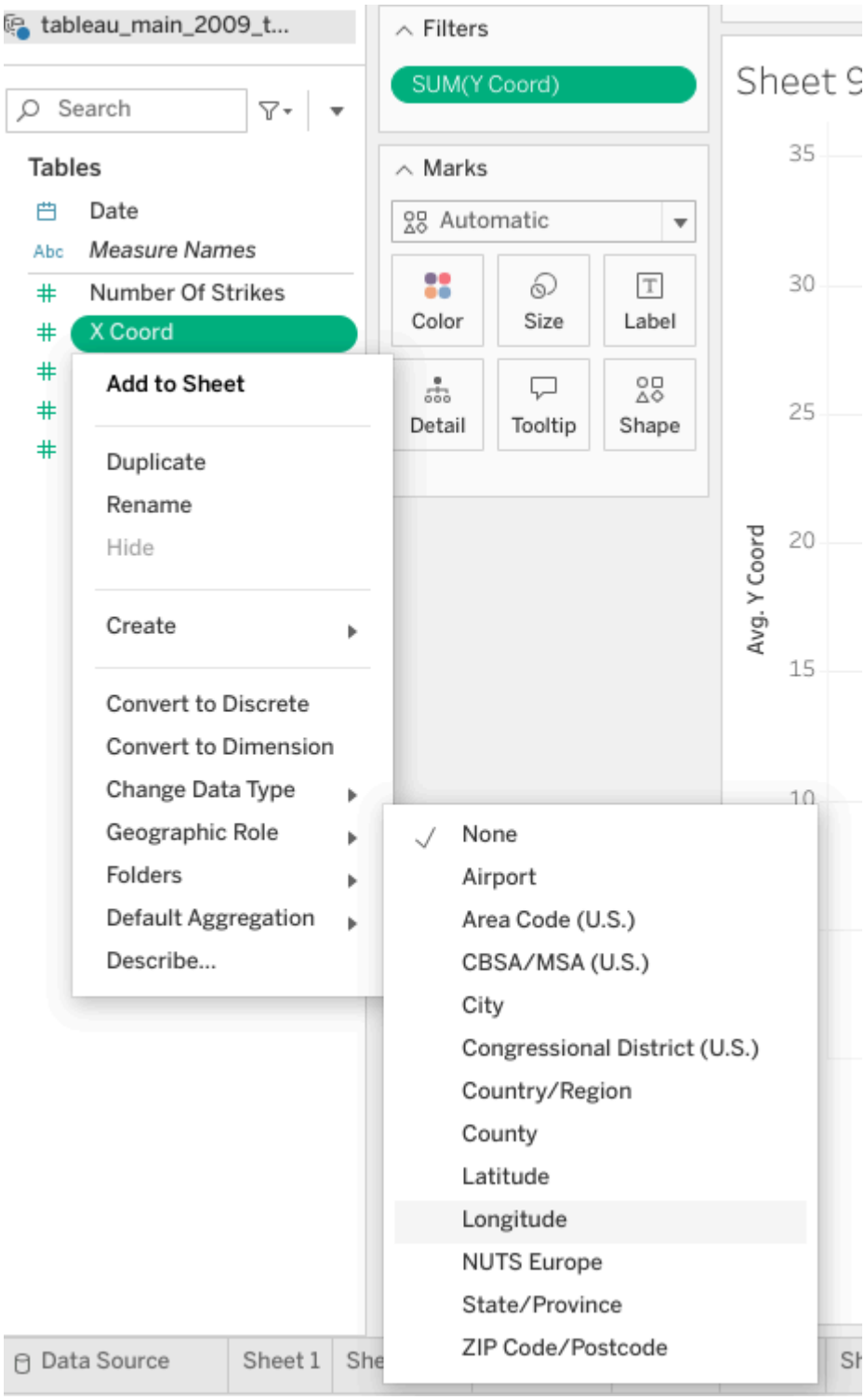
If your visualization doesn’t default to a line graph, click on “SHOW ME” in the upper right of the screen and select Lines (discrete).

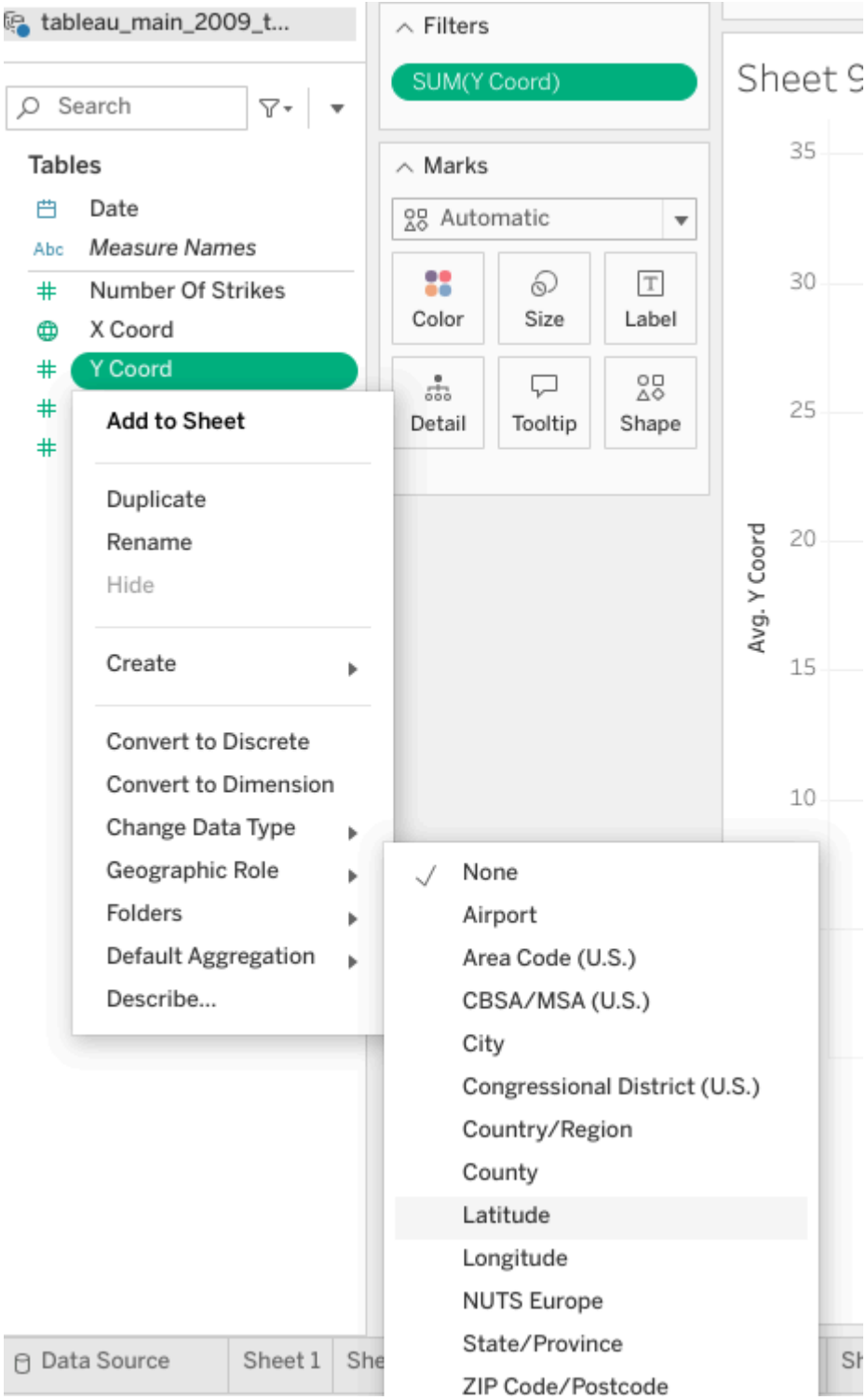
Create annotation by **right clicking** on each end of the line and selecting “Annotate mark.”
Type in “30.1M” for the Number of Strikes.
Create annotation on the final mark in the same way.
Type “45M” for number of strikes in 2018.



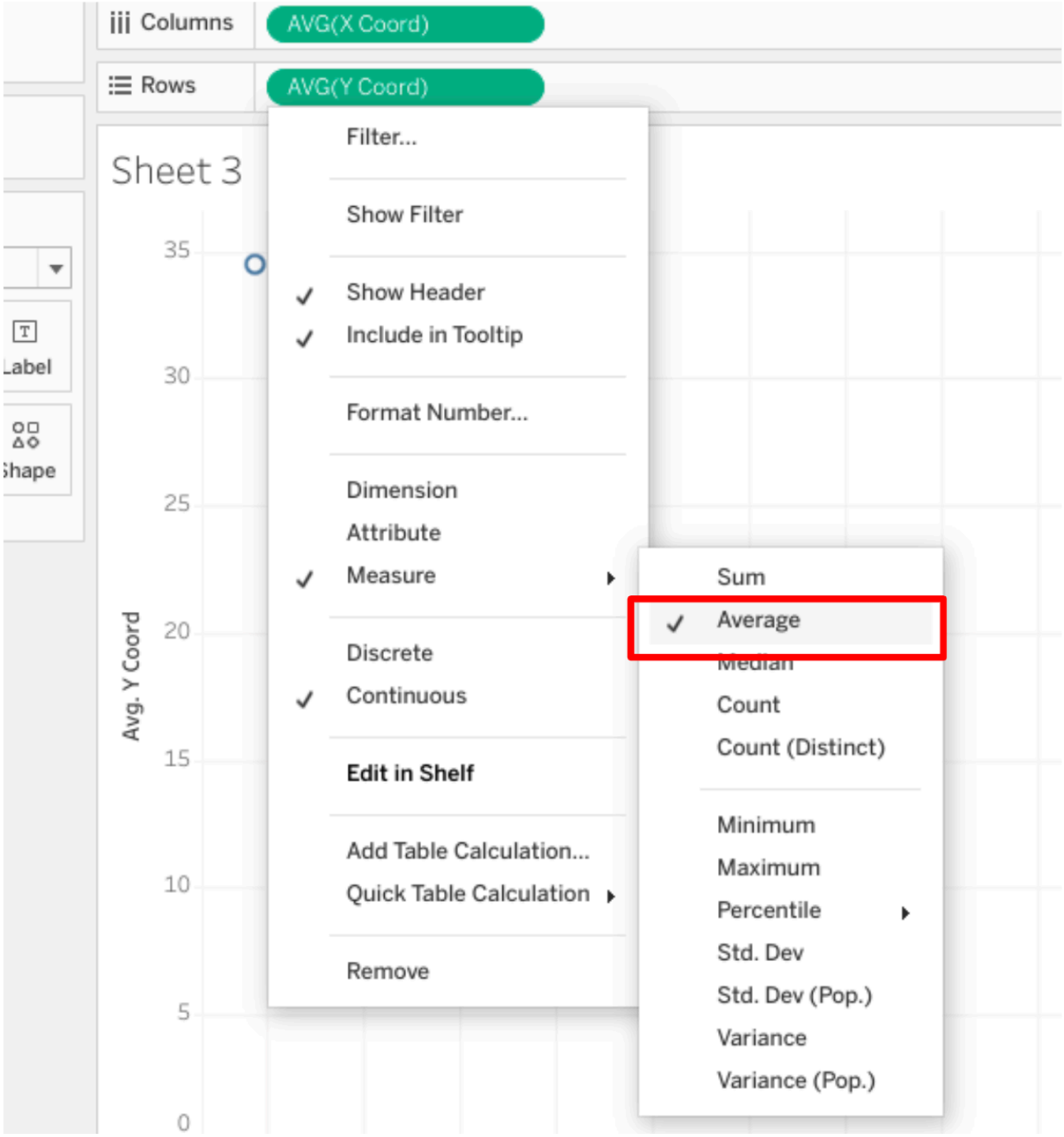
Click on NEW WORKSHEET.
Drag the X-coord to the column field. Drag the Y-coord to the Row field.

Note: Make sure the X and Y coordinates are continuous dimensions with Y coord geographic role set to latitude and X coord geographic role set to longitude.

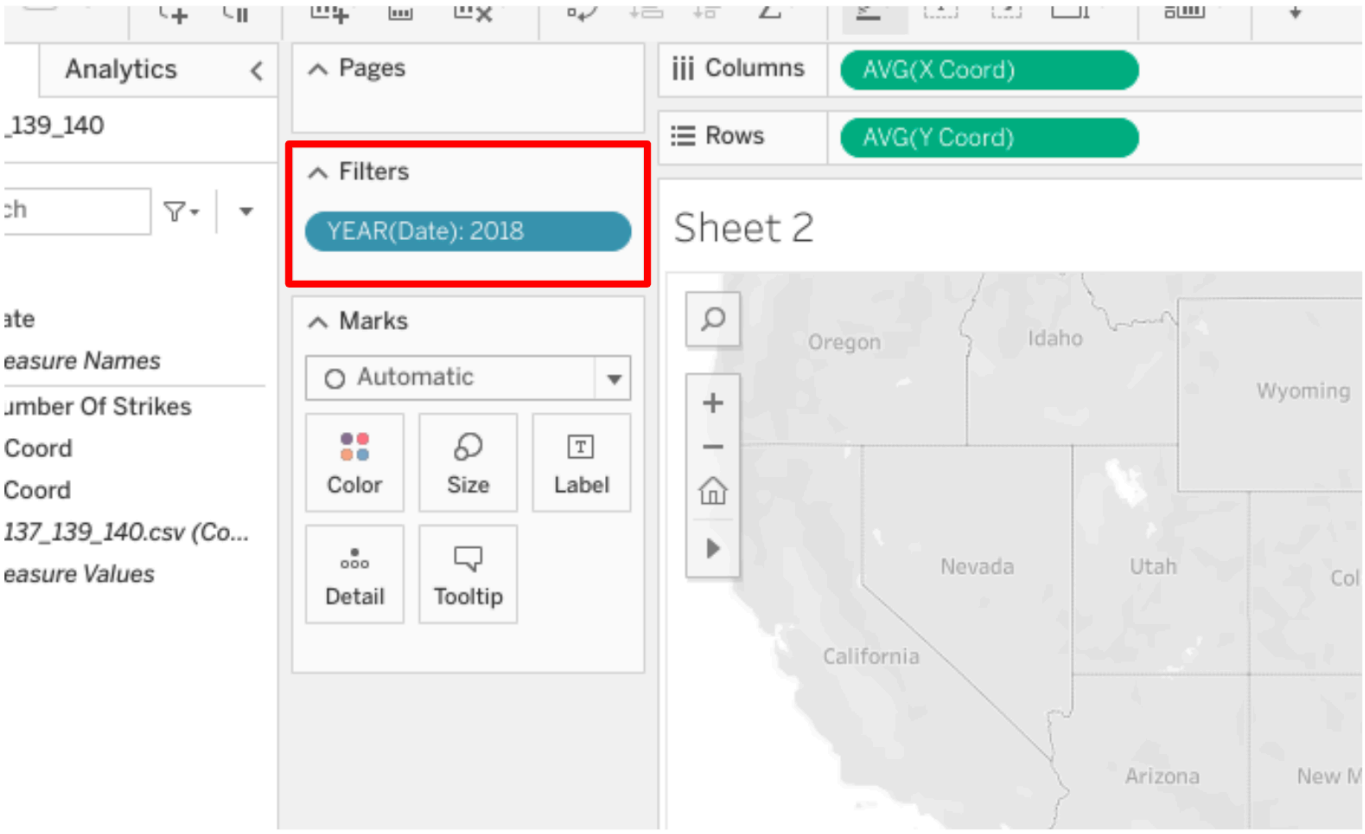

tableau_main_2009_t...
Search
Tables
Date
Measure Names
Number Of Strikes
X Coord
Add to Sheet
Duplicate
Rename
Hide
Create
Convert to Discrete
Convert to Dimension
Change Data Type
Geographic Role
Folders
Default Aggregation
Describe...
Filters
SUM(Y Coord)
Marks
Automatic
Color
Size
Label
Detail
Tooltip
Shape
Sheet 9
35
30
25
20
15
10
Avg. Y Coord
None
Airport
Area Code (U.S.)
CBSA/MSA (U.S.)
City
Congressional District (U.S.)
Country/Region
County
Latitude
Longitude
NUTS Europe
State/Province
ZIP Code/Postcode
Data Source
Sheet 1



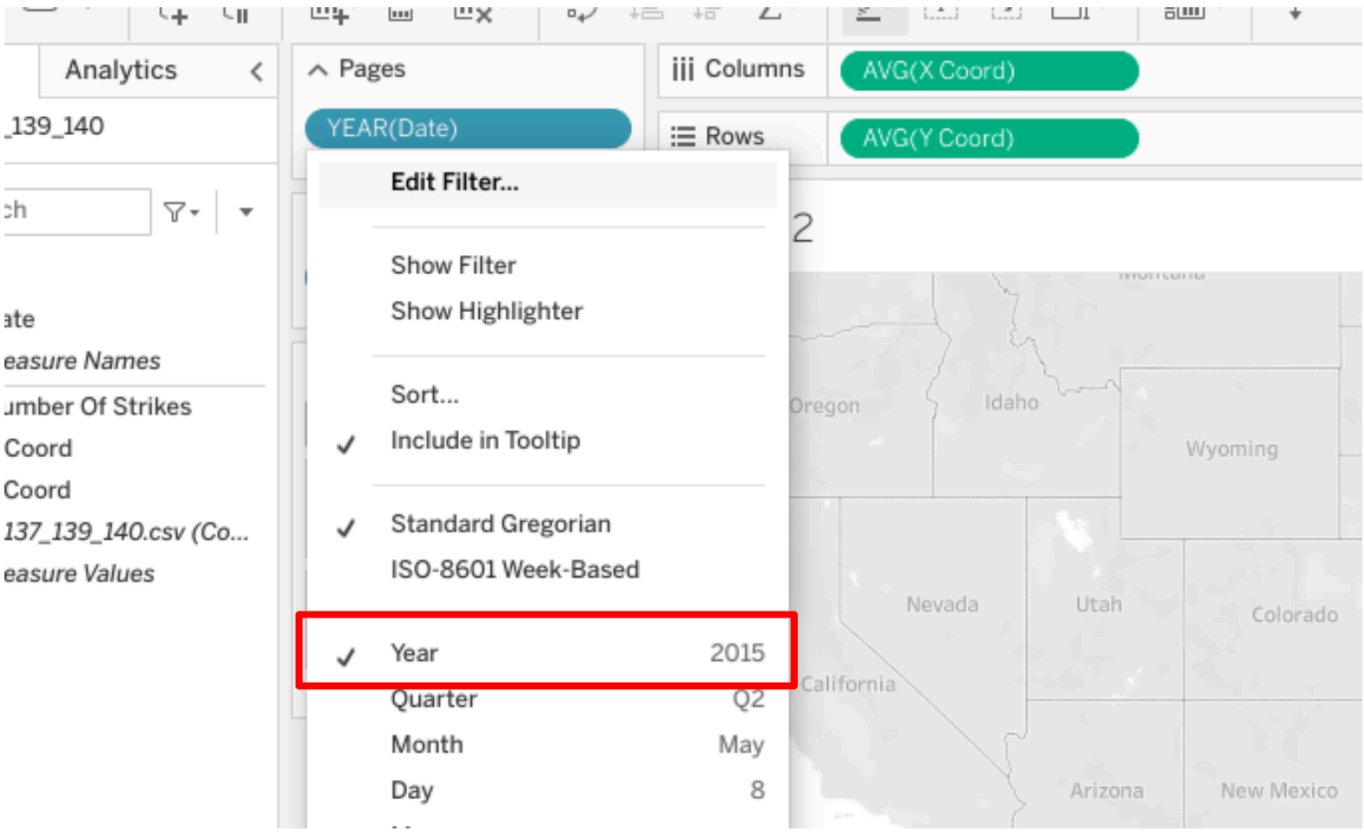
Click on the dropdown for both the X and Y coordinates.
Select MEASURE then AVERAGE.



Drag DATE to filter field.

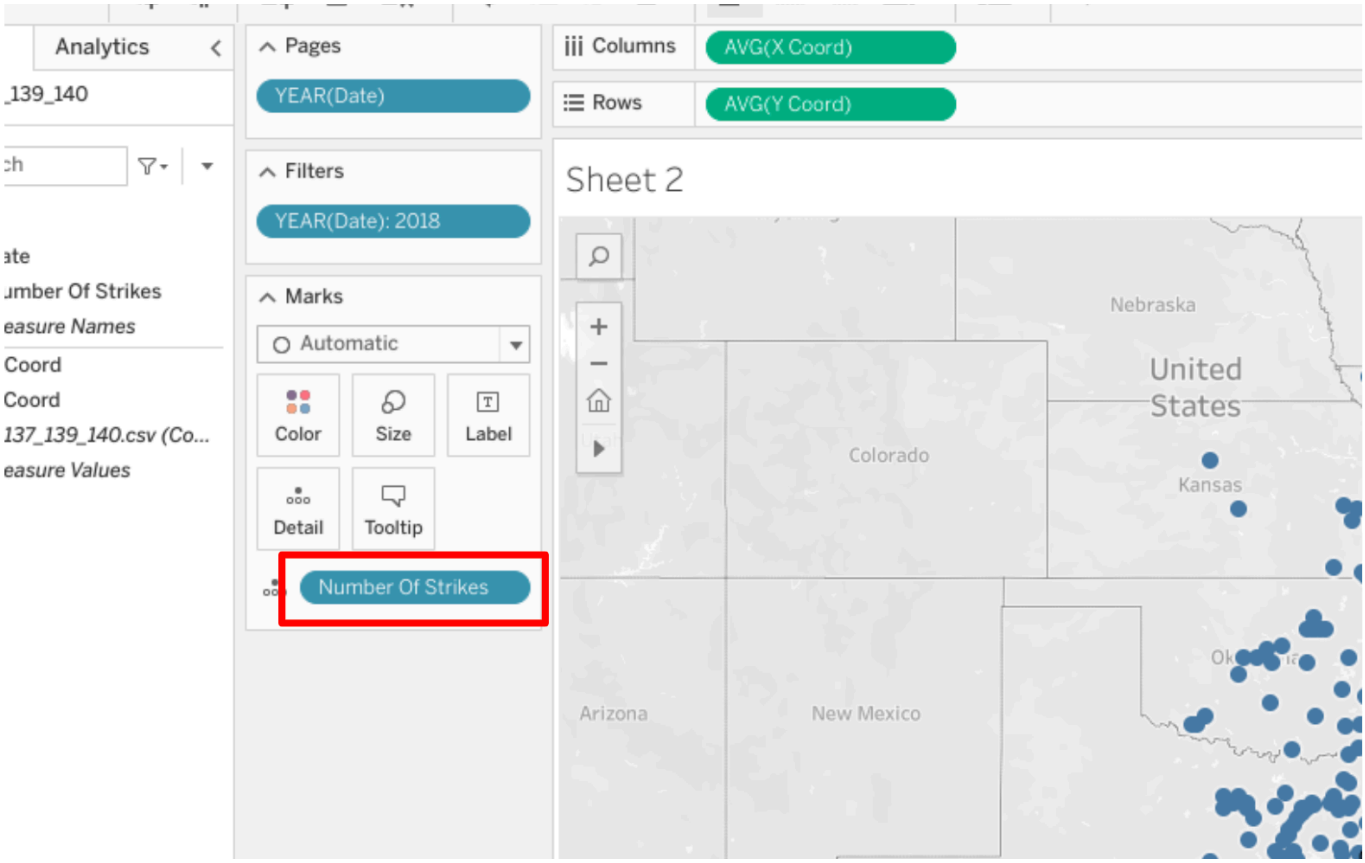


Drag DATE to pages field, select year from dropdown.



Drag NUMBER of STRIKES to the detail field.

Note: Be sure to click the dropdown on “Number of Strikes” and convert it to a dimension.



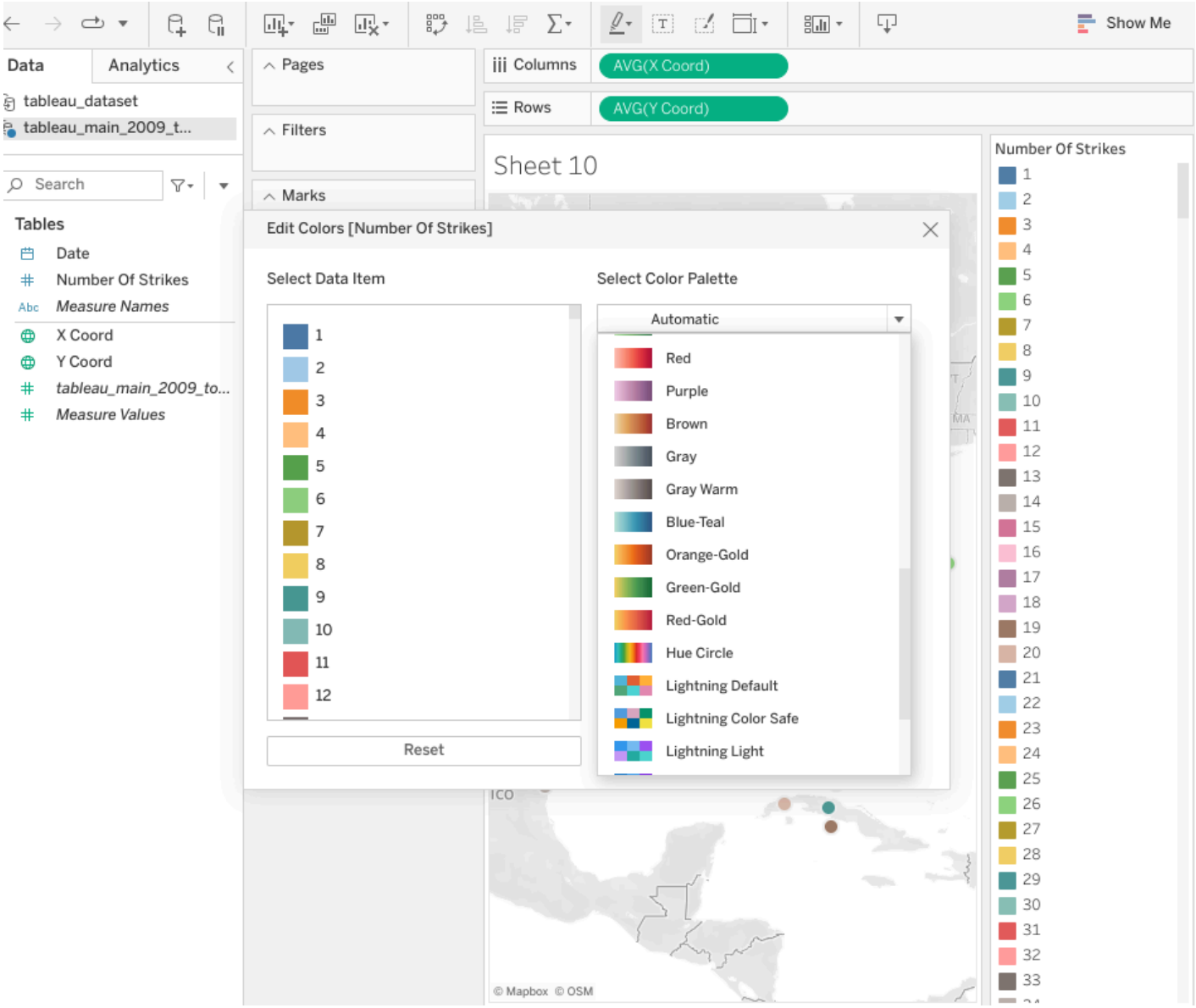
Click on NEW WORKSHEET.

Drag the X-coord to the column field. Drag the Y-coord to the Row field.

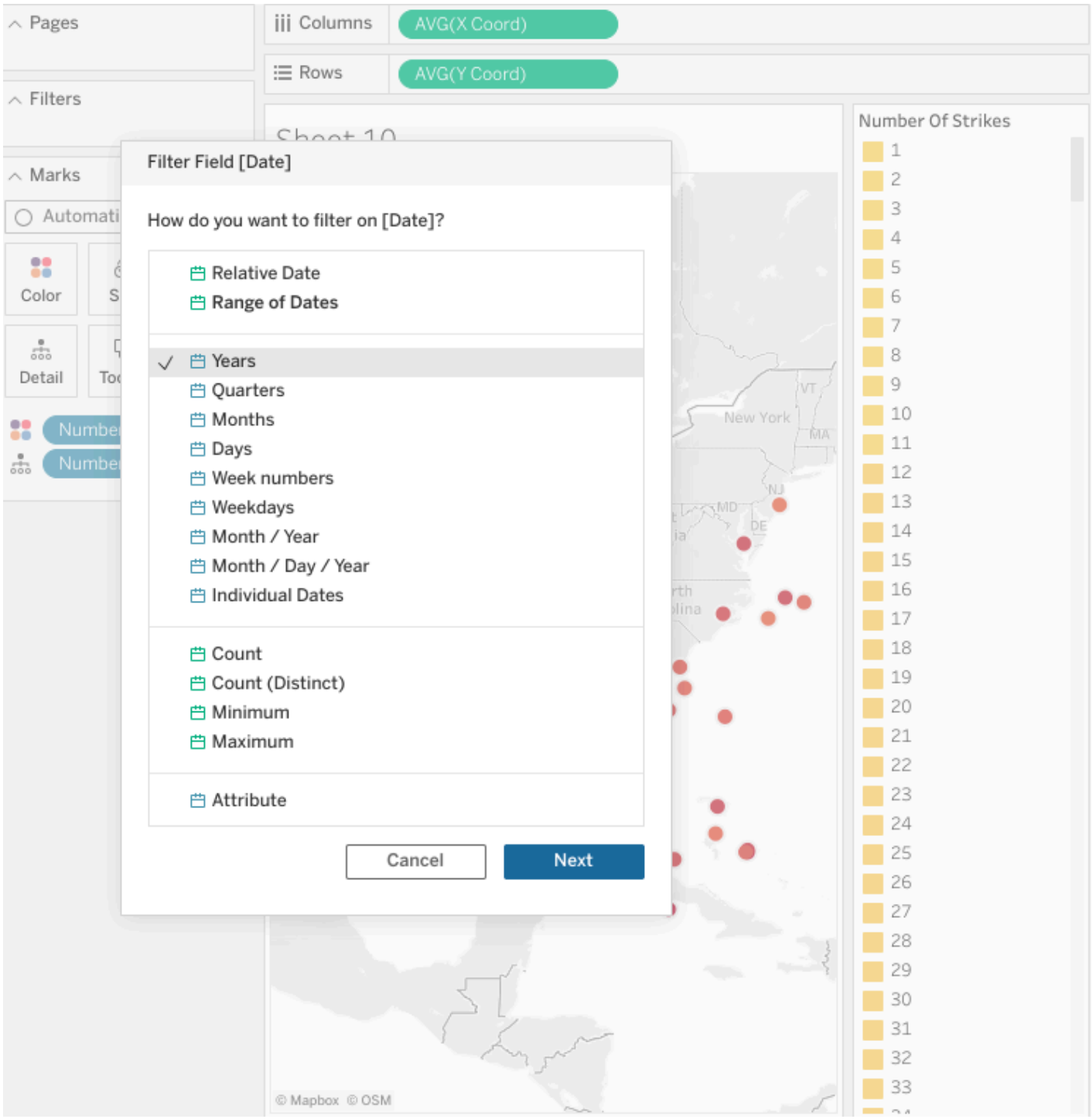
Drag the Number of Strikes measure to the detail field.

Note: Make sure the Number of Strikes measure is Discrete. To do so, right click Number of Strikes measure and click “Convert to Discrete.”

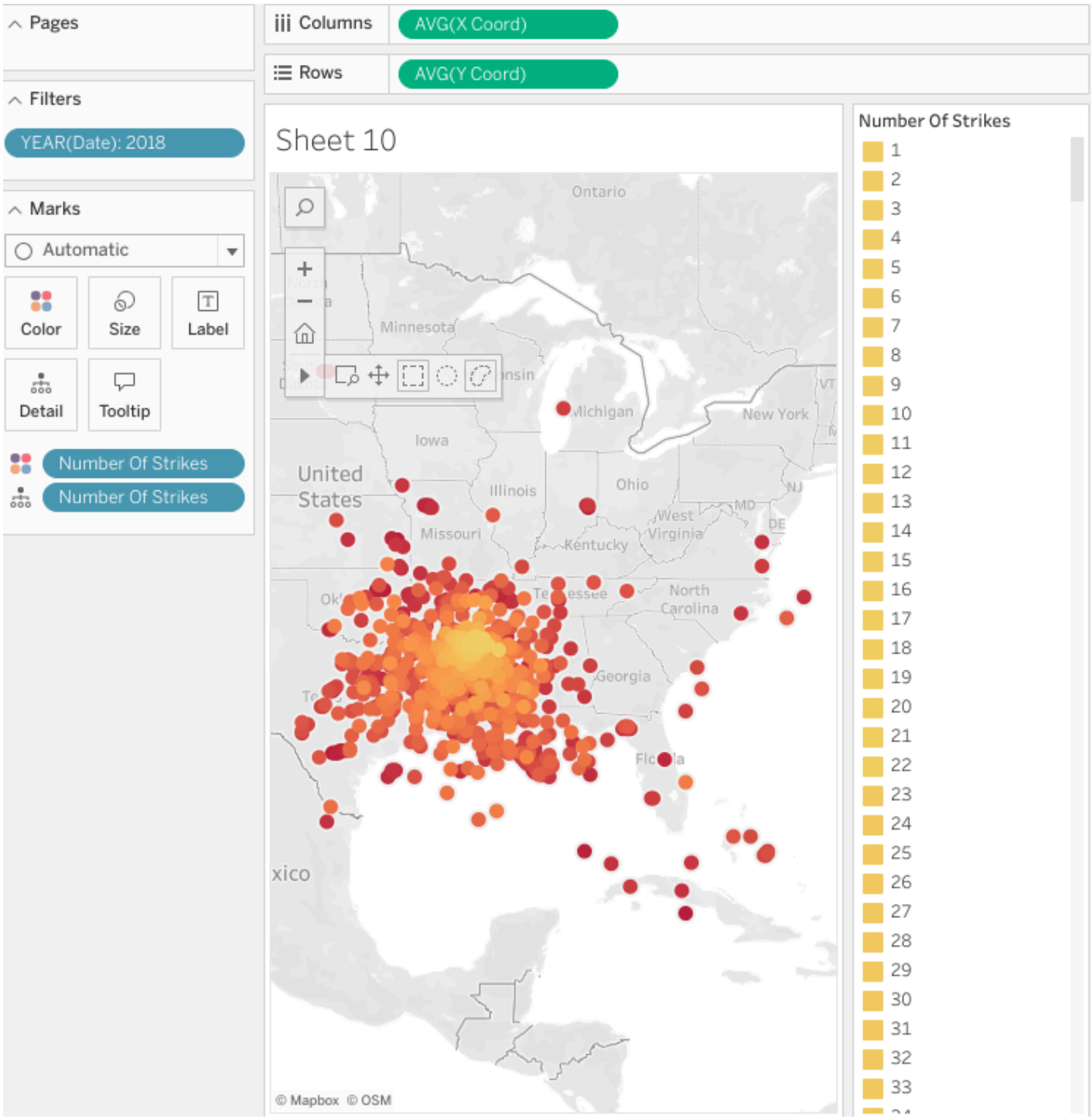
Add Number of Strikes to the color field and make the color coincide with the number of strikes. Select Red-Gold under “Automatic” drop down.



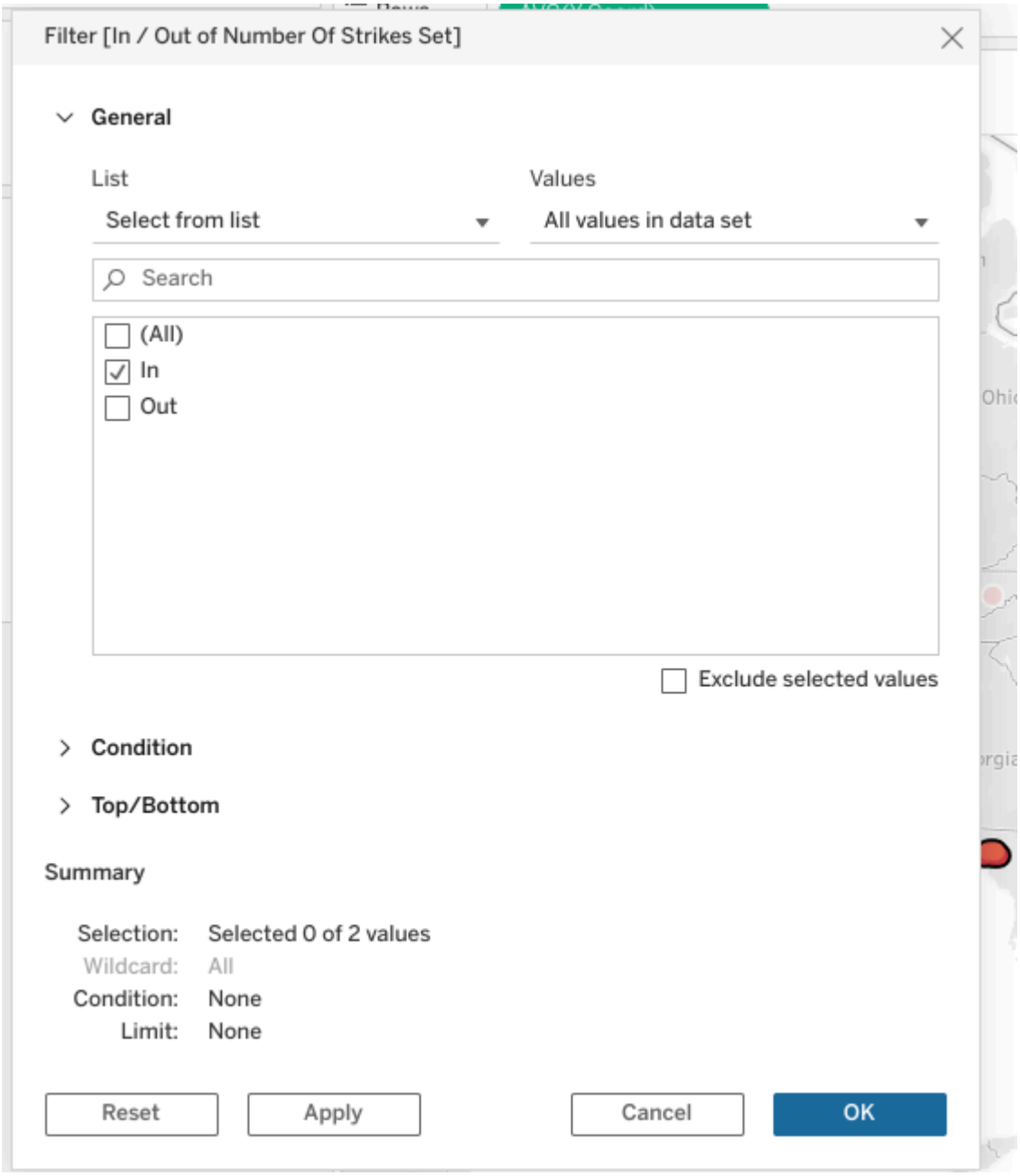
Drop Date into the Filters field and select Year.



Use the lasso tool. To do so, hover your cursor over your geographic map visualization and a small line of graphics will appear on the left side. Hover over the right arrow then click on the lasso image.

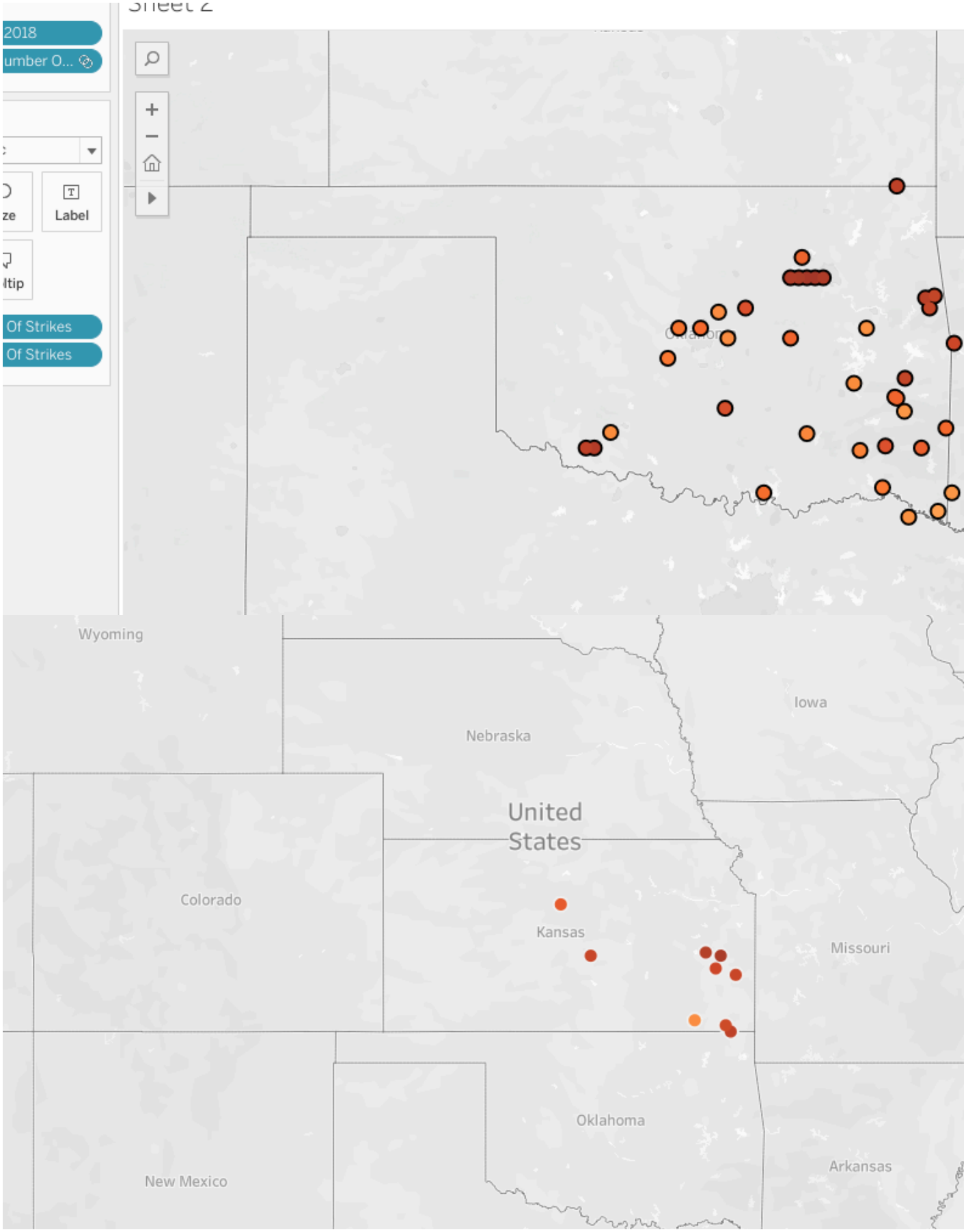


Drag your cursor over the Texas state border, select Keep Only then click Create Set. Drag your new set to the Filters field and select ‘In’ from Filter.



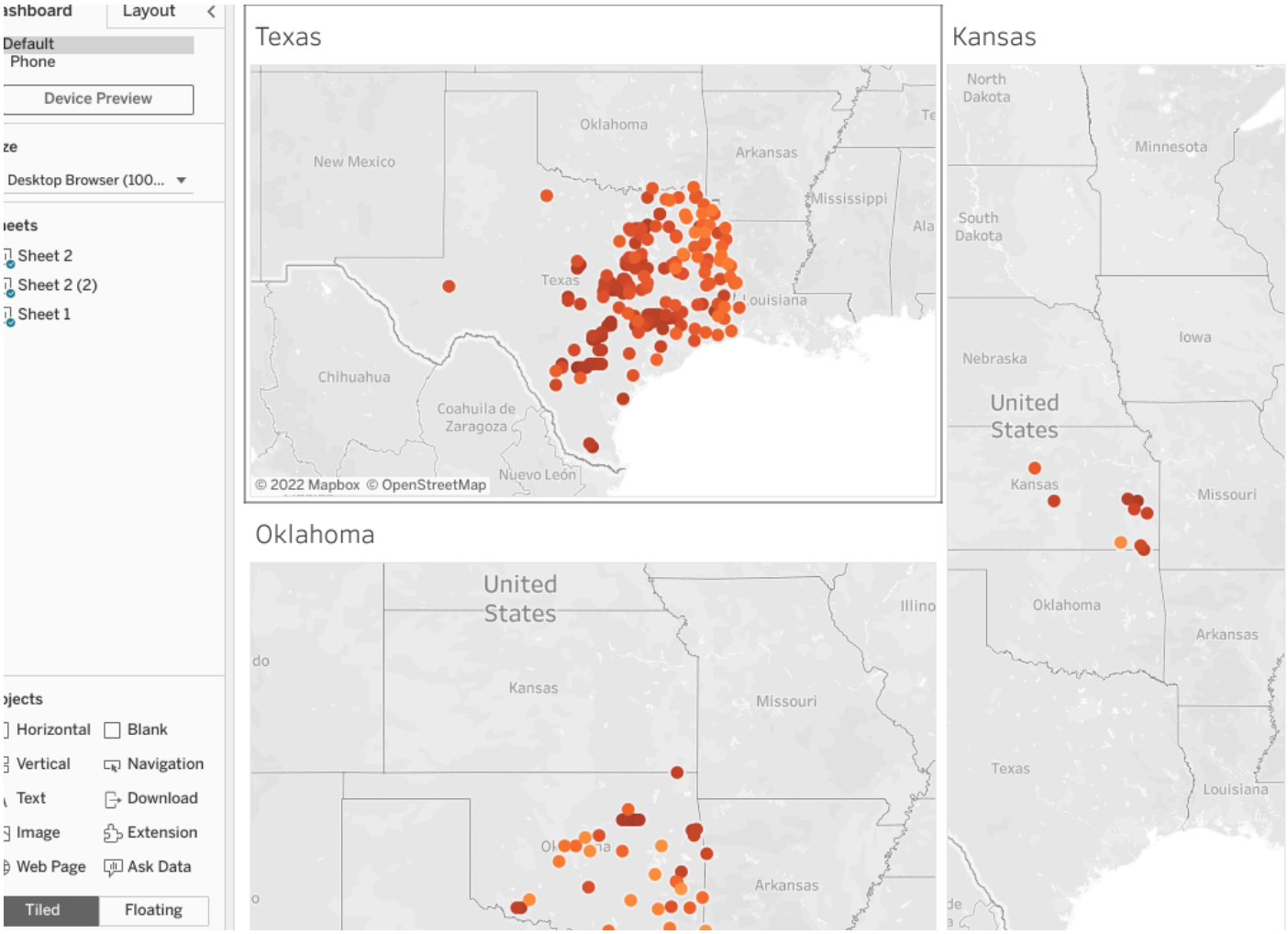
Note: The dashboards section shown in the final part of this instructional video should be completed on your own. It is up to you to design the Oklahoma and Kansas visualizations by following the same steps as performed for Texas in the video. For detailed instructions to create the on-screen visuals shown in the remainder of this video, please follow the proceeding steps.

Create two duplicates of this sheet and redo the same tracing of states process, but for Oklahoma and Kansas.



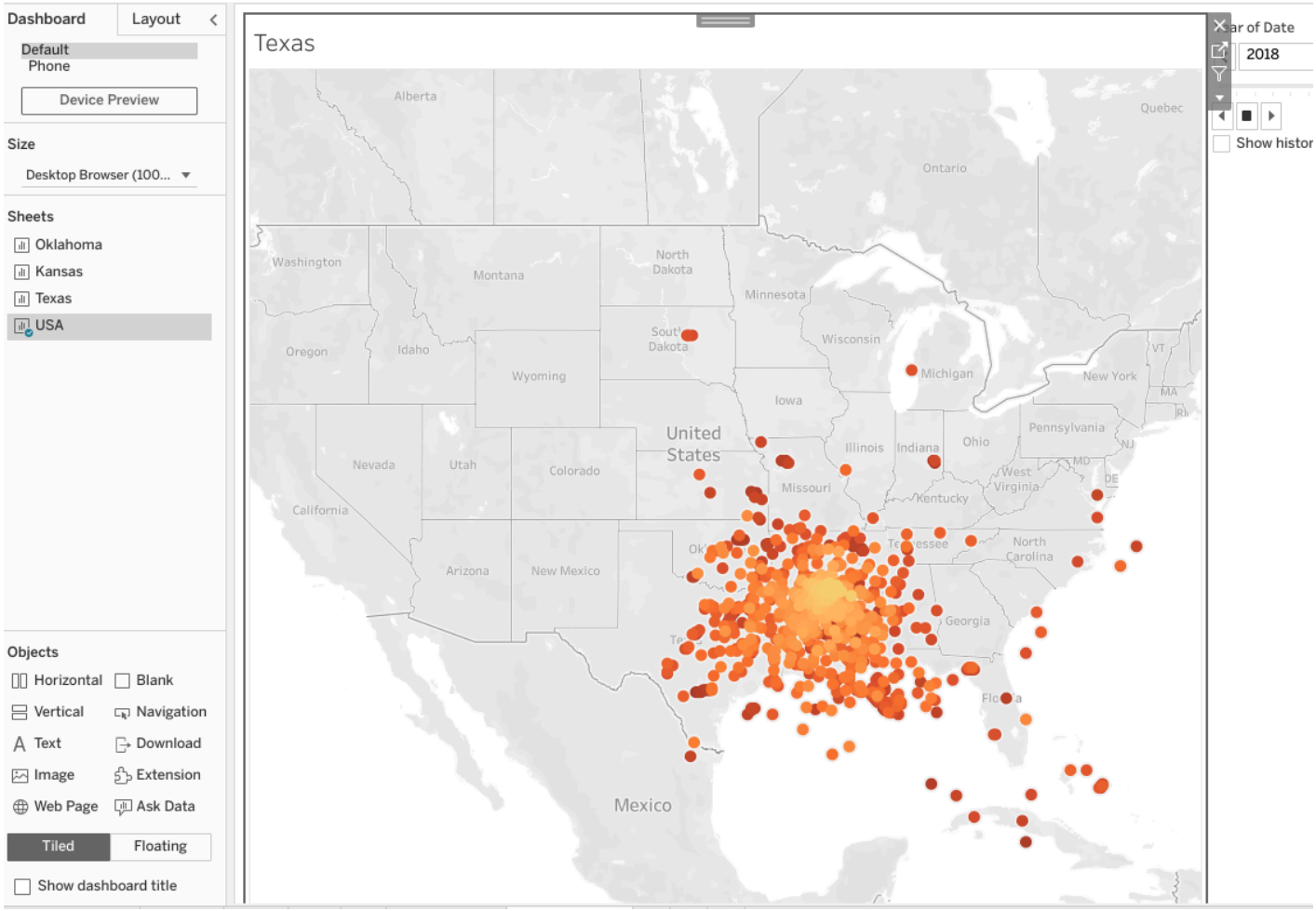
Click on “New Dashboard” at bottom of page.

In the dashboard, embed the three state worksheets.

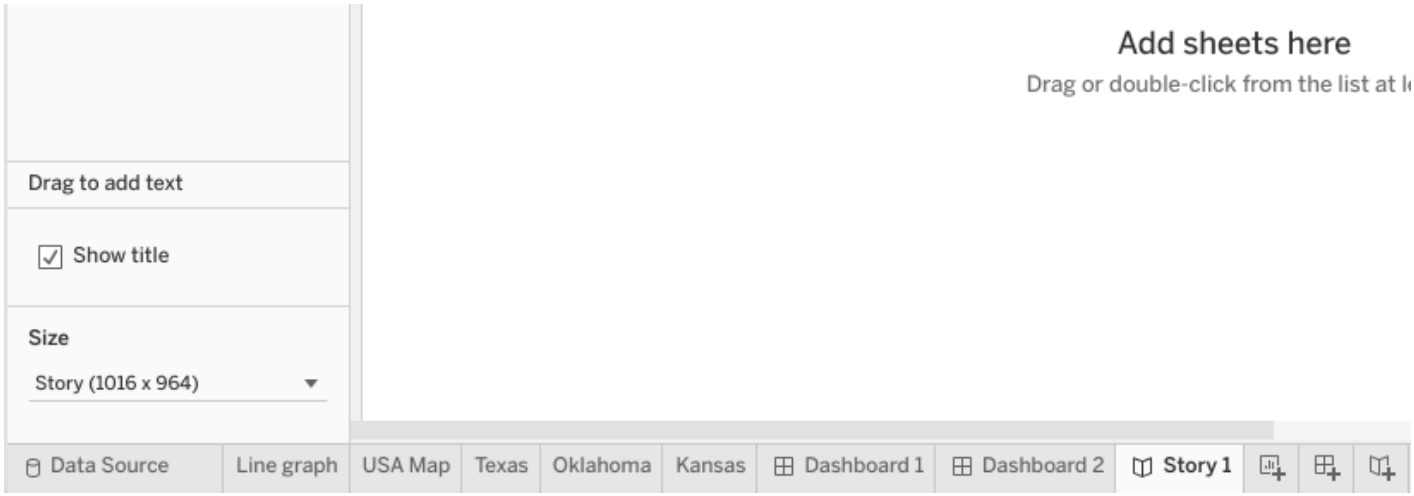


Create another dashboard.

Place USA map in it.



Create a new STORY at the bottom of the Tableau page.



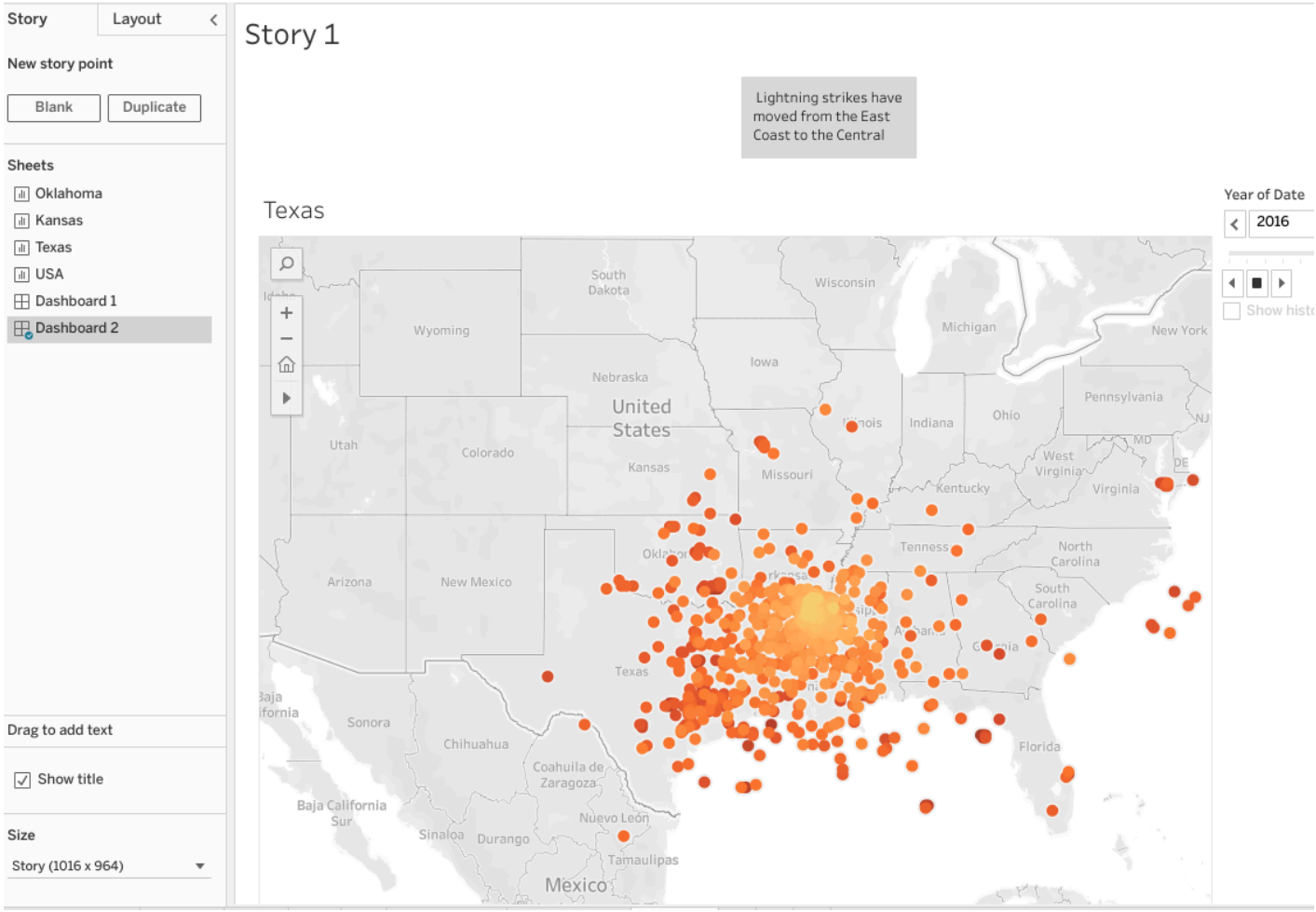
On the first page, select the line graph dashboard.

Fill in the caption with “Lightning strikes in the U.S. have increased 50% over the last decade.”

Go to page 2 of the story.

Select USA dashboard for Page 2.

In caption type, “Lightning strikes have moved from the East Coast to the Central Mainlands over the last decade.”

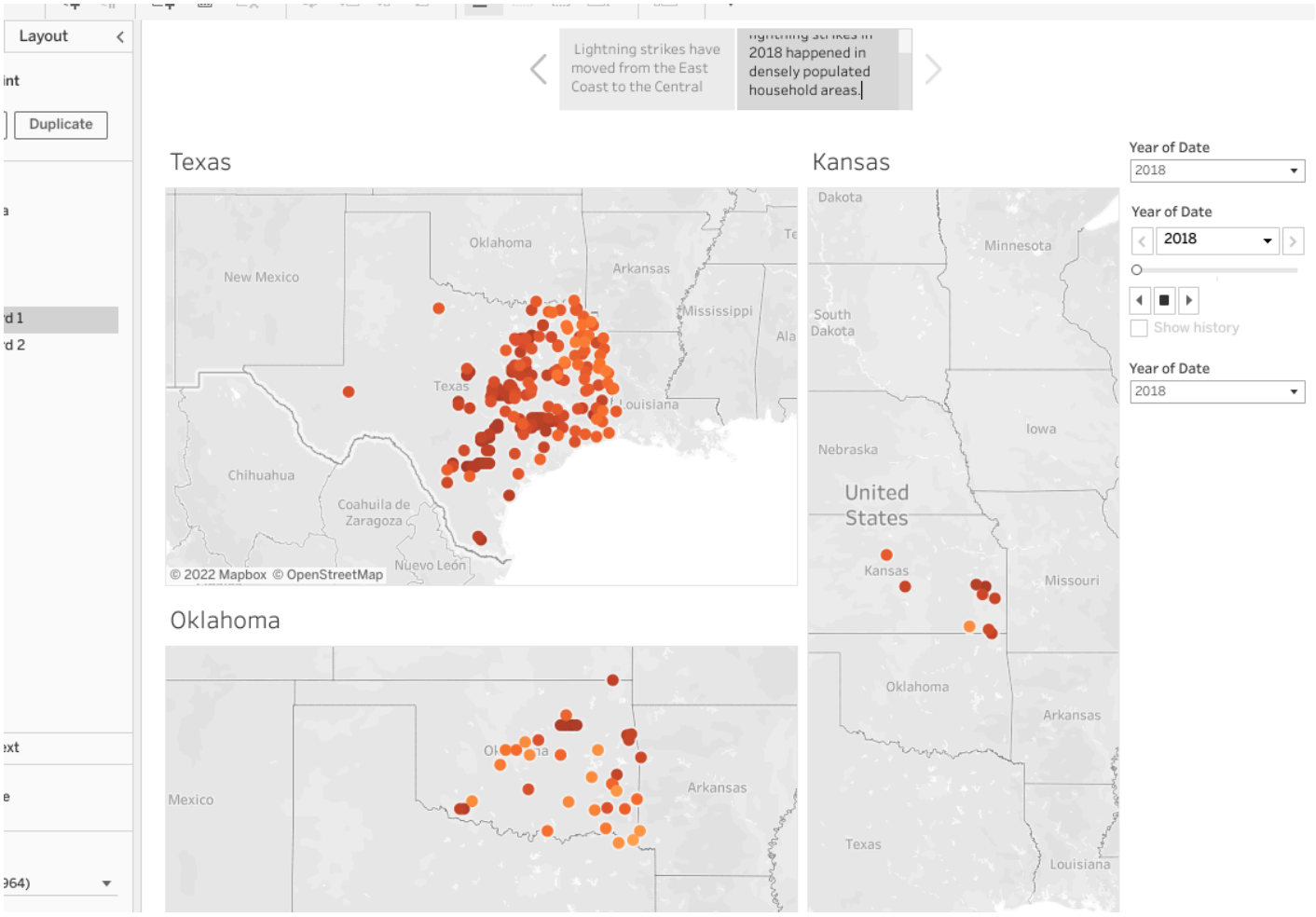


Go to page 3 of Story.

Select the last dashboard with three states on it.

In caption type, “Most number of lightning strikes in 2018 happened in densely populated household areas.”

And now you’ve created a story using dashboards and worksheets as building blocks!



Mark as completed

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