Follow-along guide: Present like a pro with Tableau

This document includes detailed instructions for how to perform the data visualizations described in the video “Present like a pro 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. Use the same data source as the previous video. 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

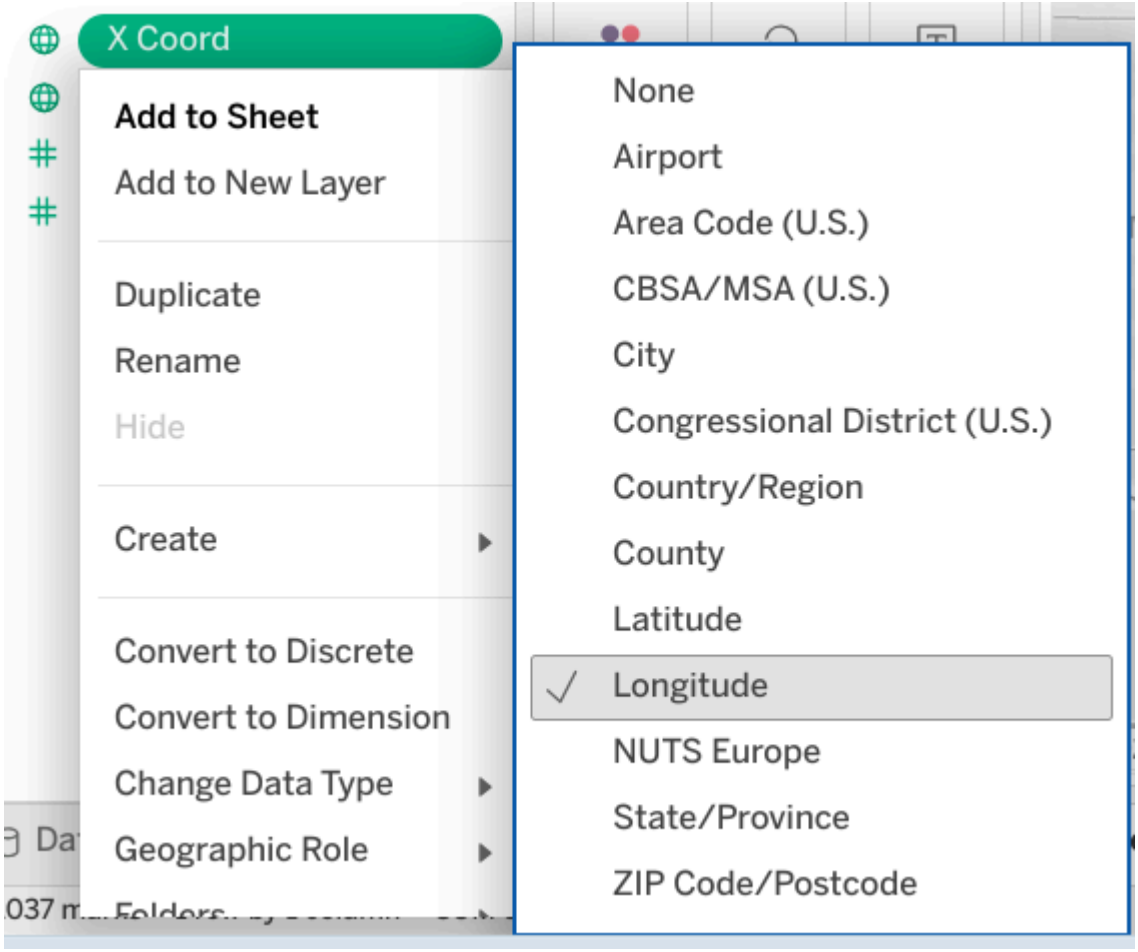
Click on NEW WORKSHEET.

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

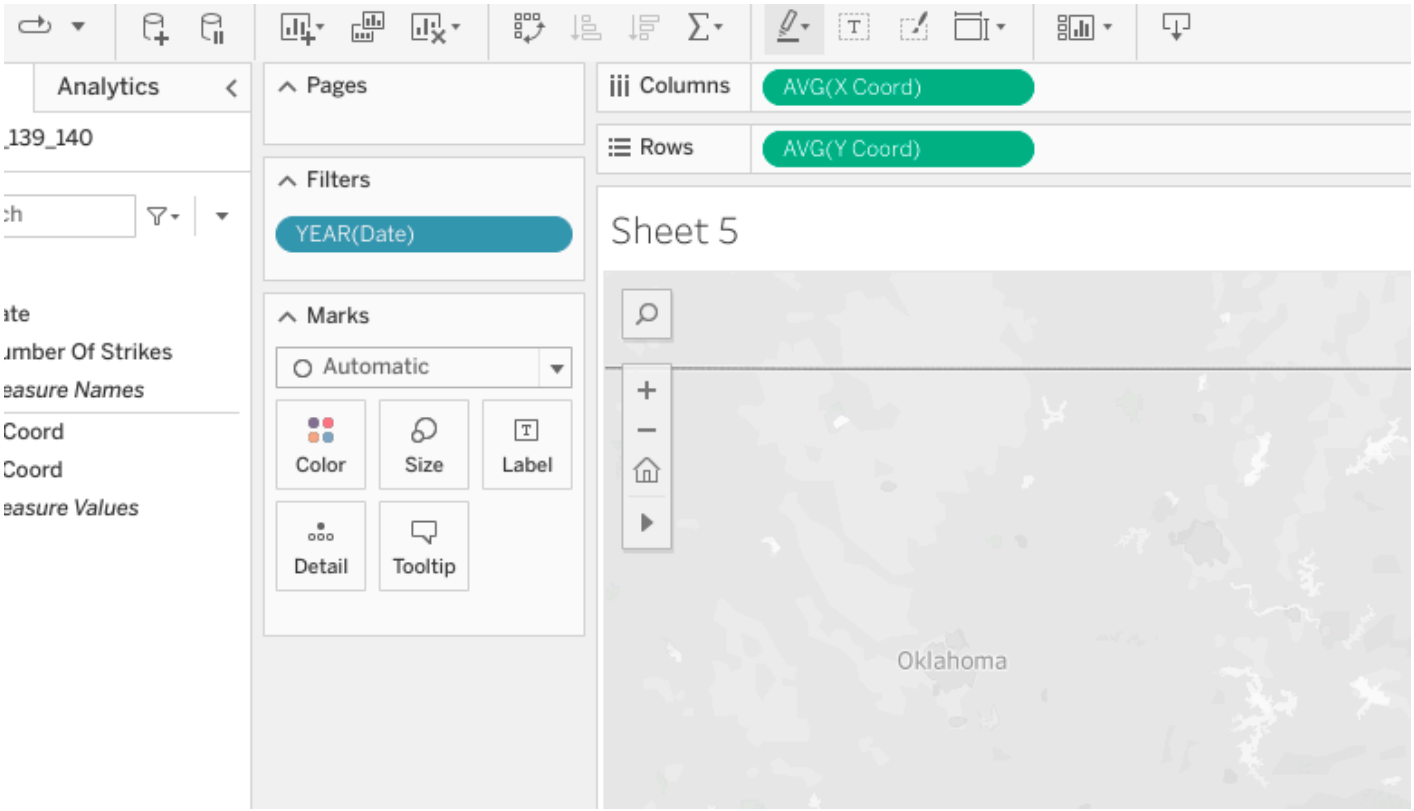
Sheet 1- Map

Set the geographic role of the X coord to Longitude

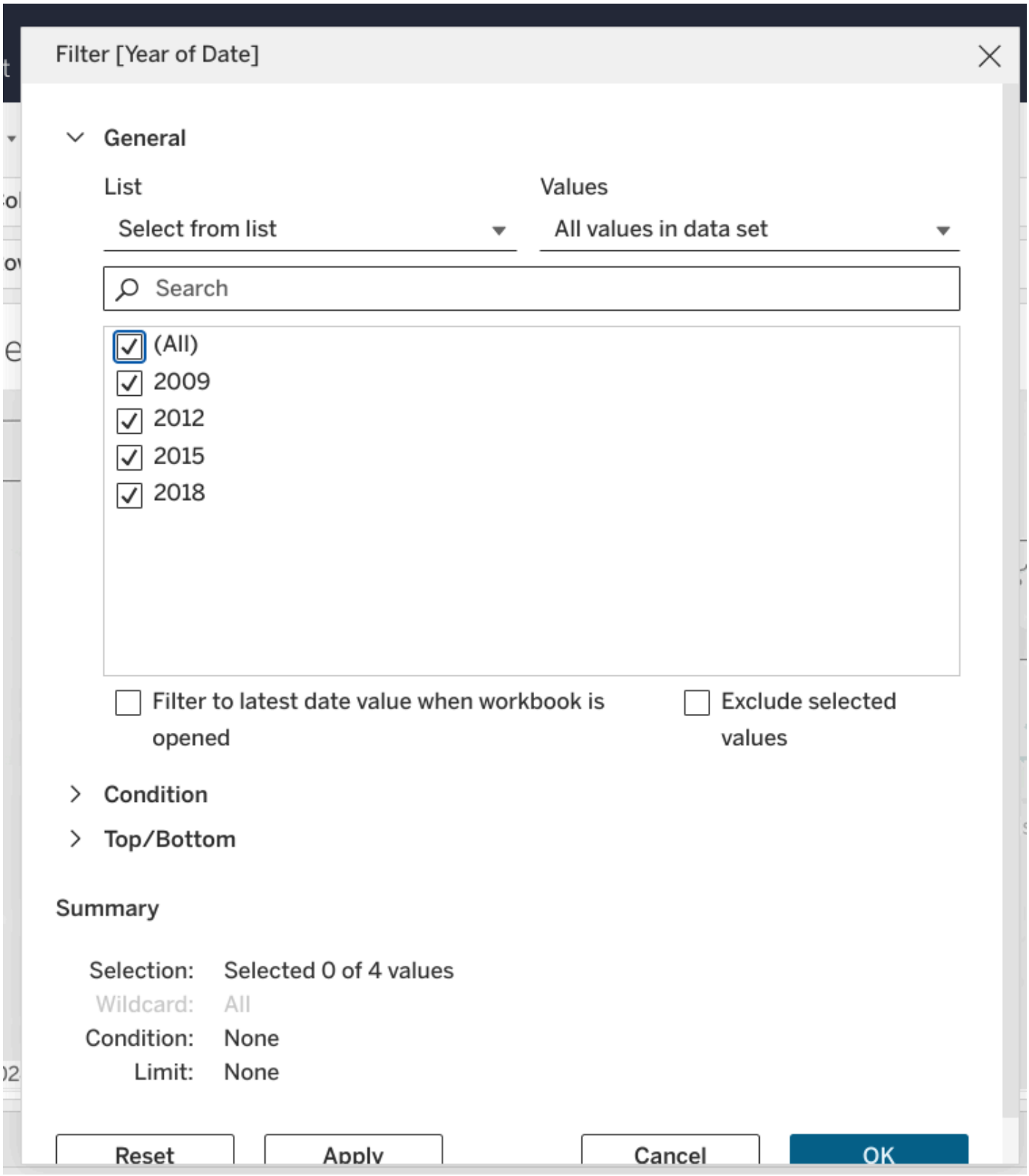
Set the geographic role of the Y coord to Latitude



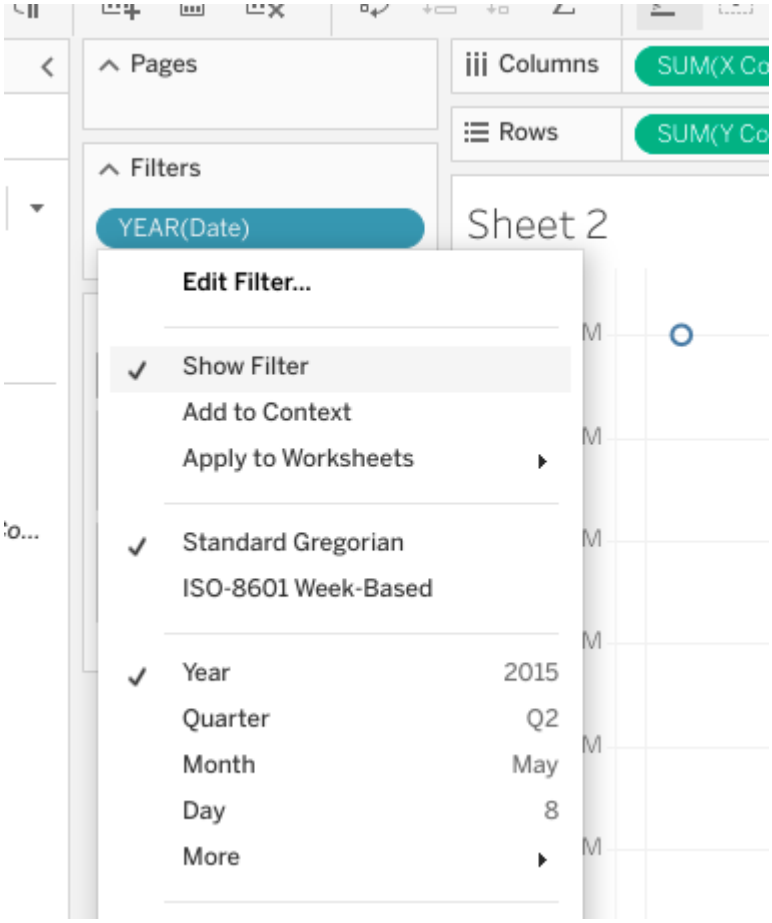
Drag X coord to Column field. Drag Y coord to Row field.
Drag DATE to FILTERS.



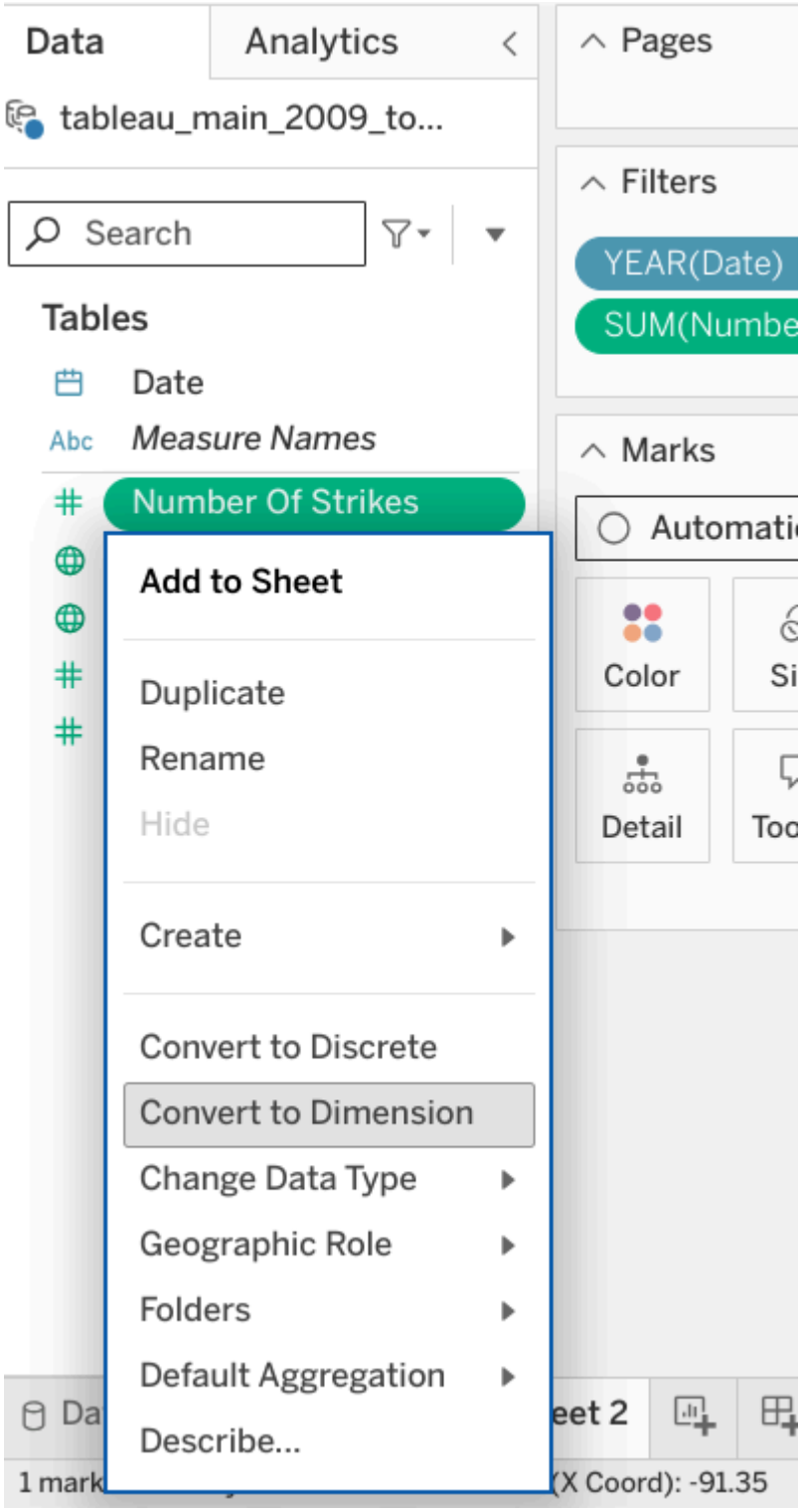
Select **Years**. This will be a filter. Select All.



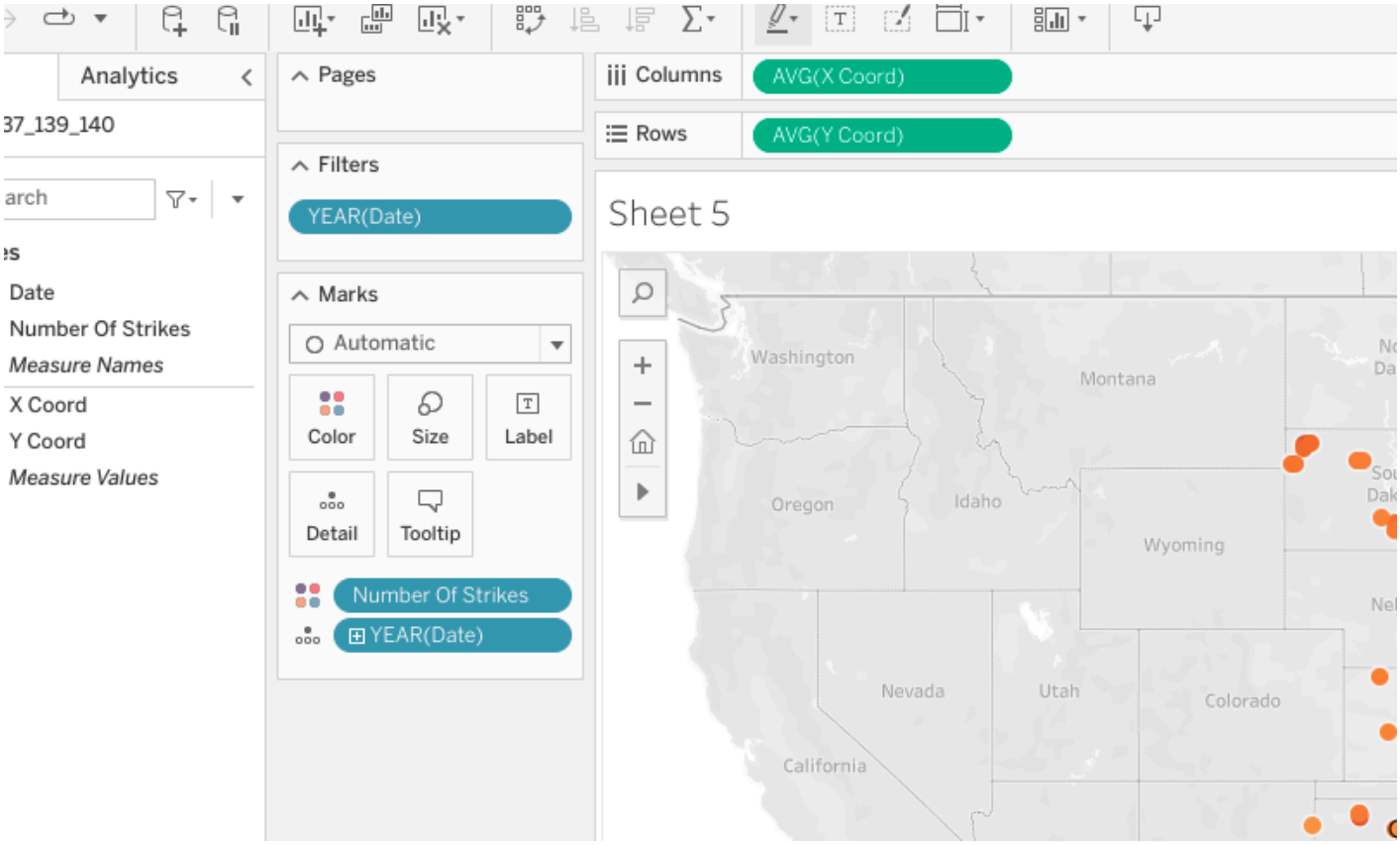
Click on DATE dropdown, select SHOW FILTER.



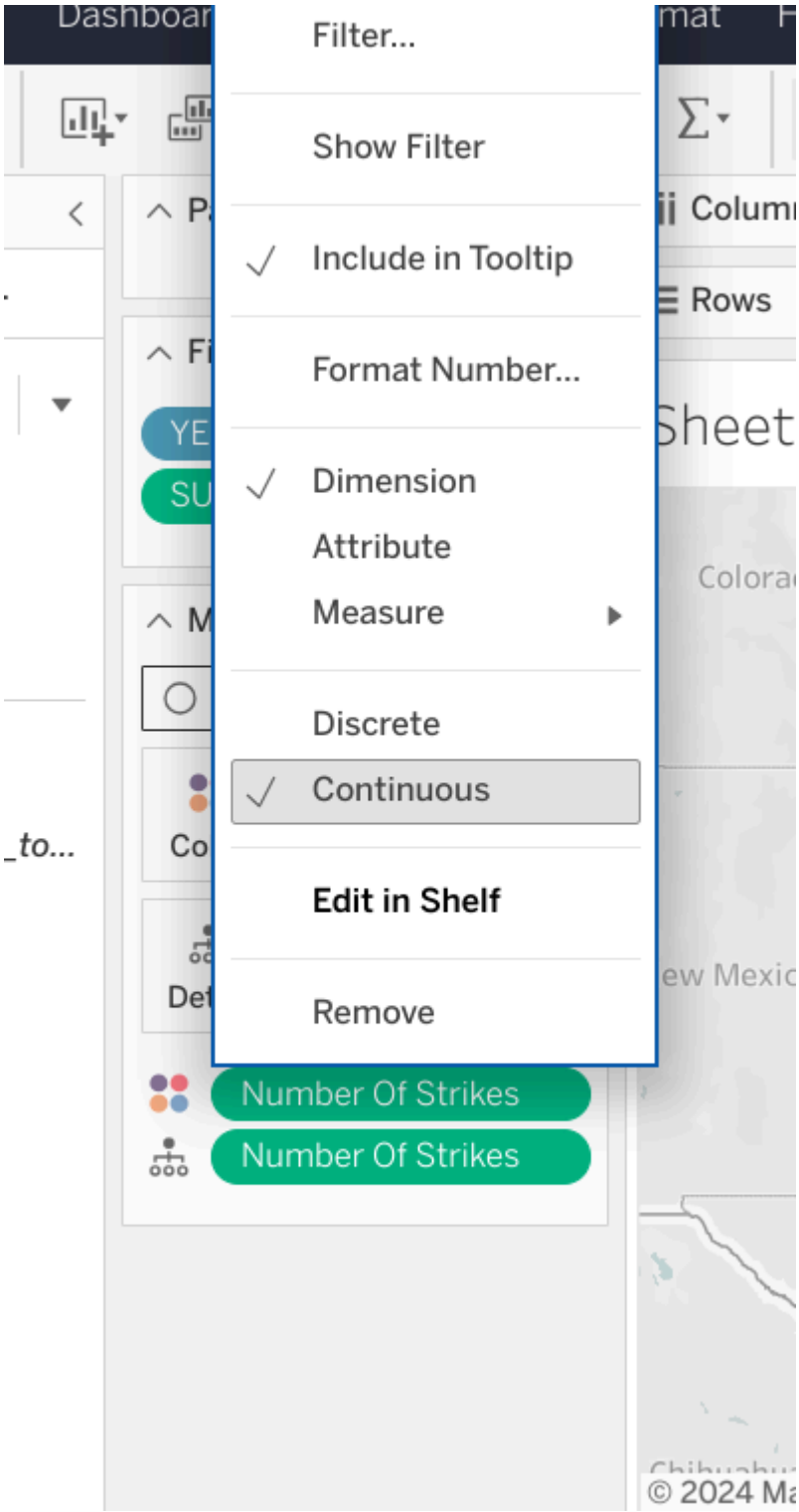
Click on NUMBER of STRIKES and select CONVERT to DIMENSION



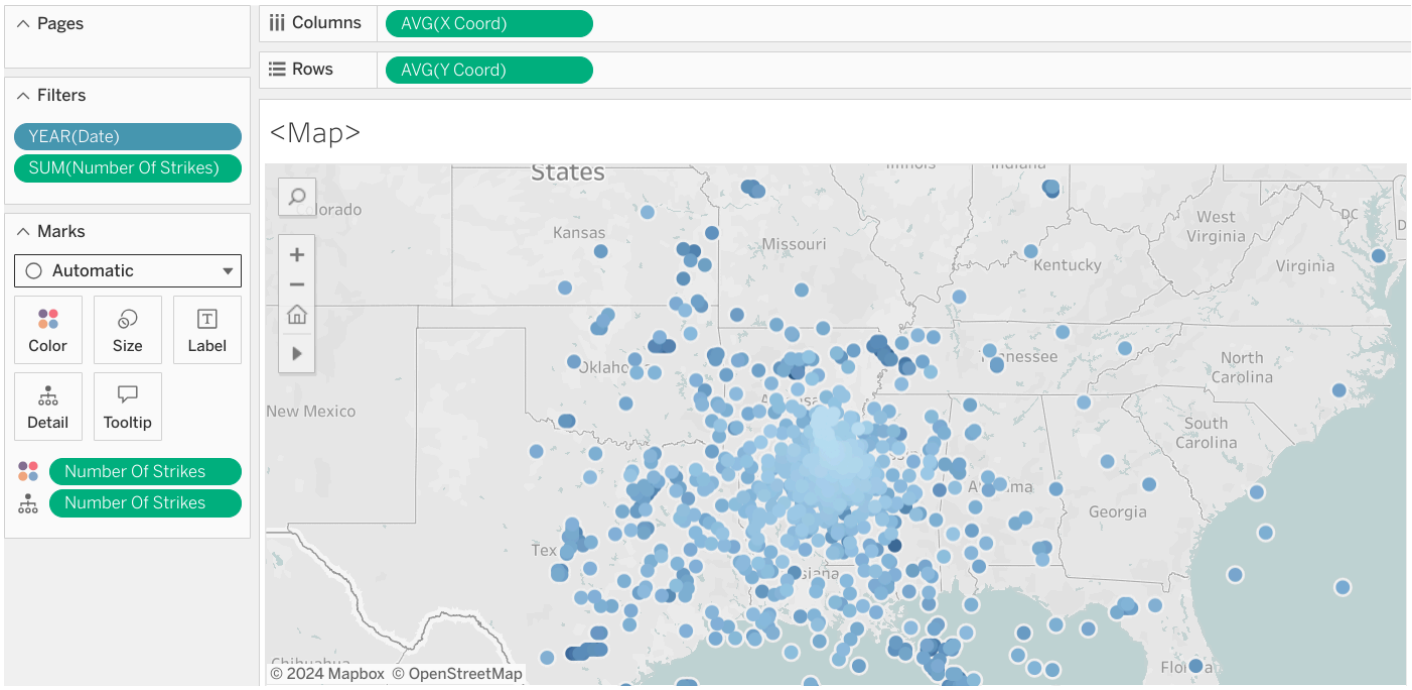
Drag NUMBER of STRIKES into both the COLOR square and DETAIL square inside the MARKS box.



Click on dropdown of NUMBER OF STRIKES, select CONTINUOUS.



Before moving on to the next Sheet, title Sheet 1 Map. You can do this under Rows between <> by clicking in that space.



Sheet 2

In the same Tableau Workbook, Click on NEW WORKSHEET.

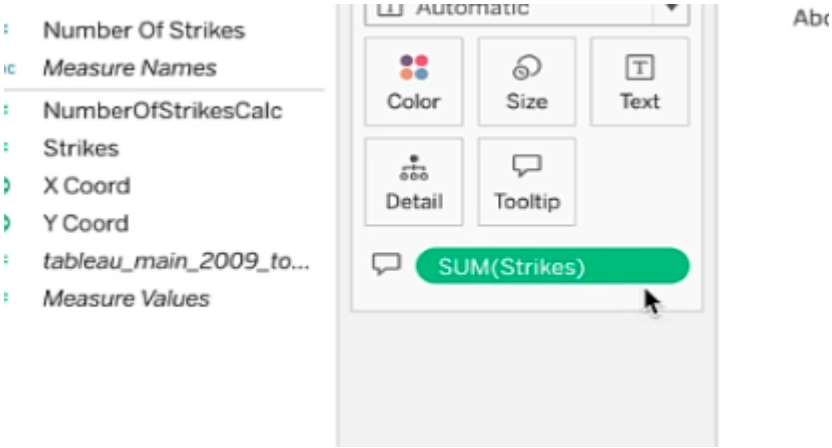
Click dropdown of NUMBER of STRIKES field.

Select CREATE and CALCULATED FIELD.

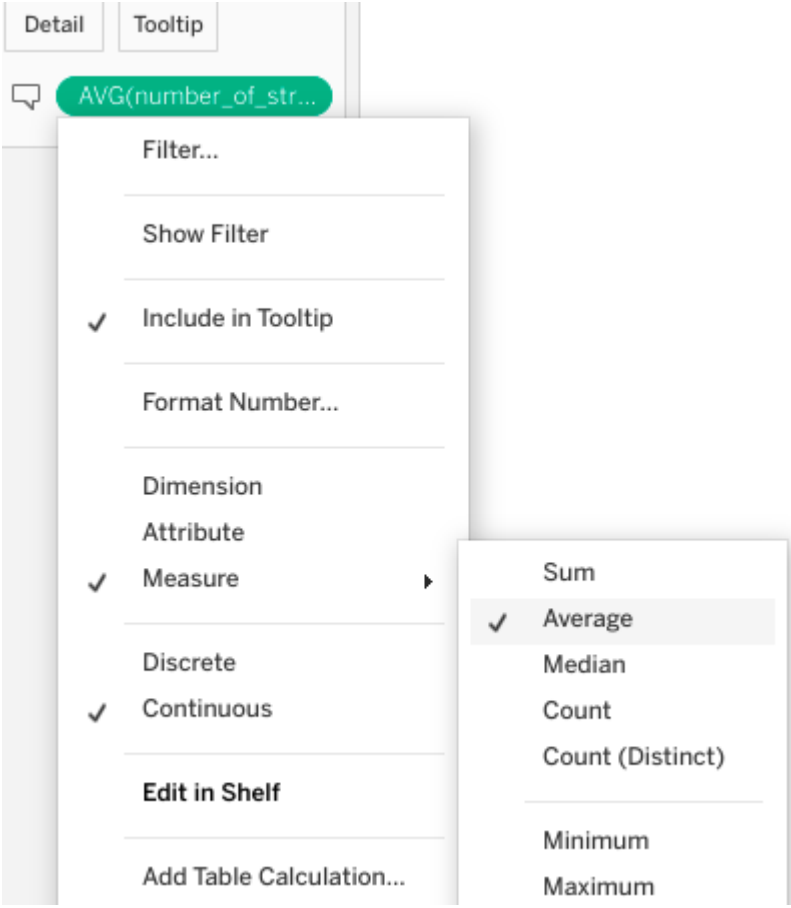
TYPE “Strikes” for the title.

Click OK.

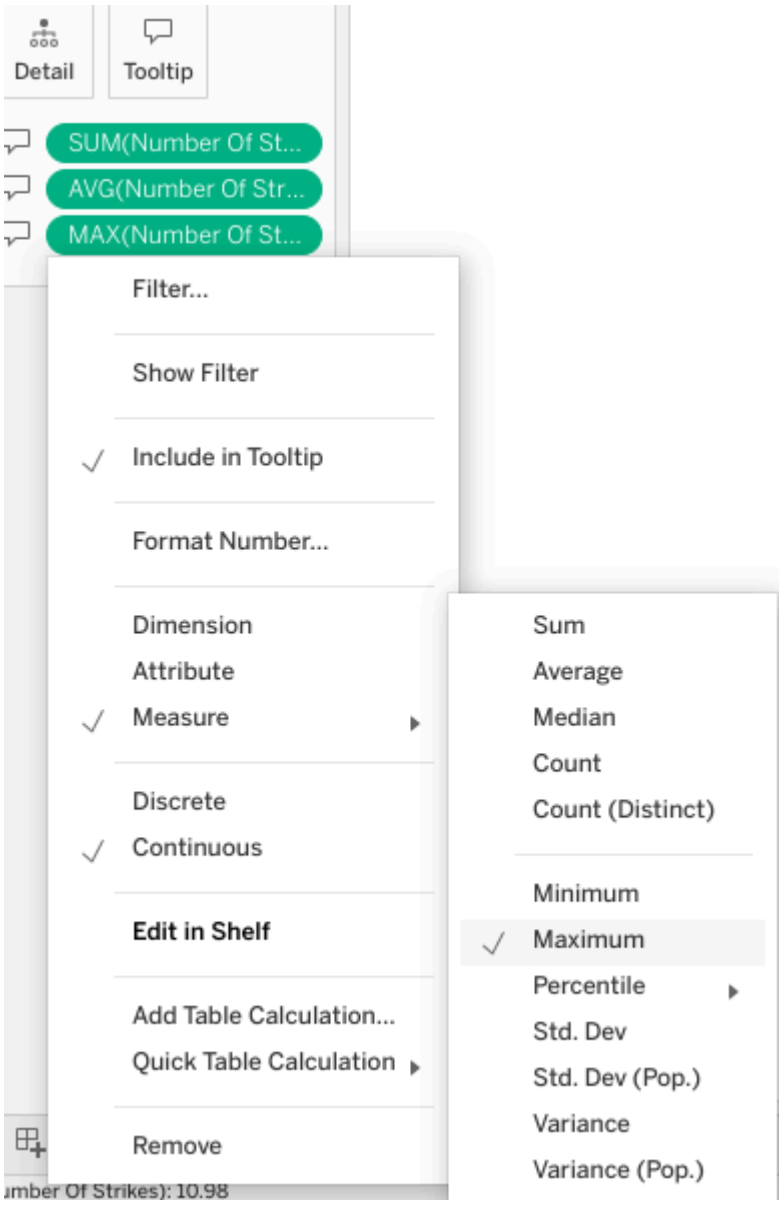
Drag calculation into TOOLTIP field.



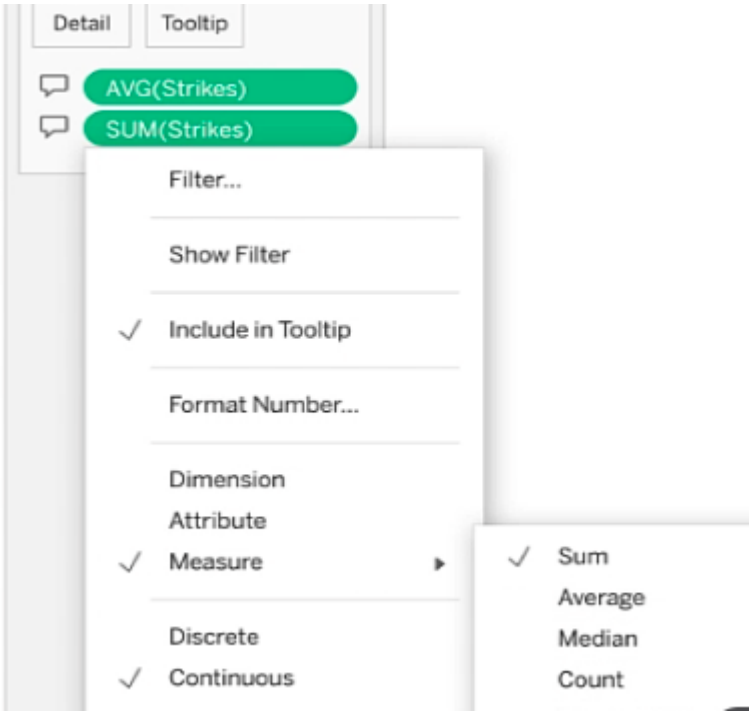
In the Strikes drop down, Select MEASURE, then AVERAGE.



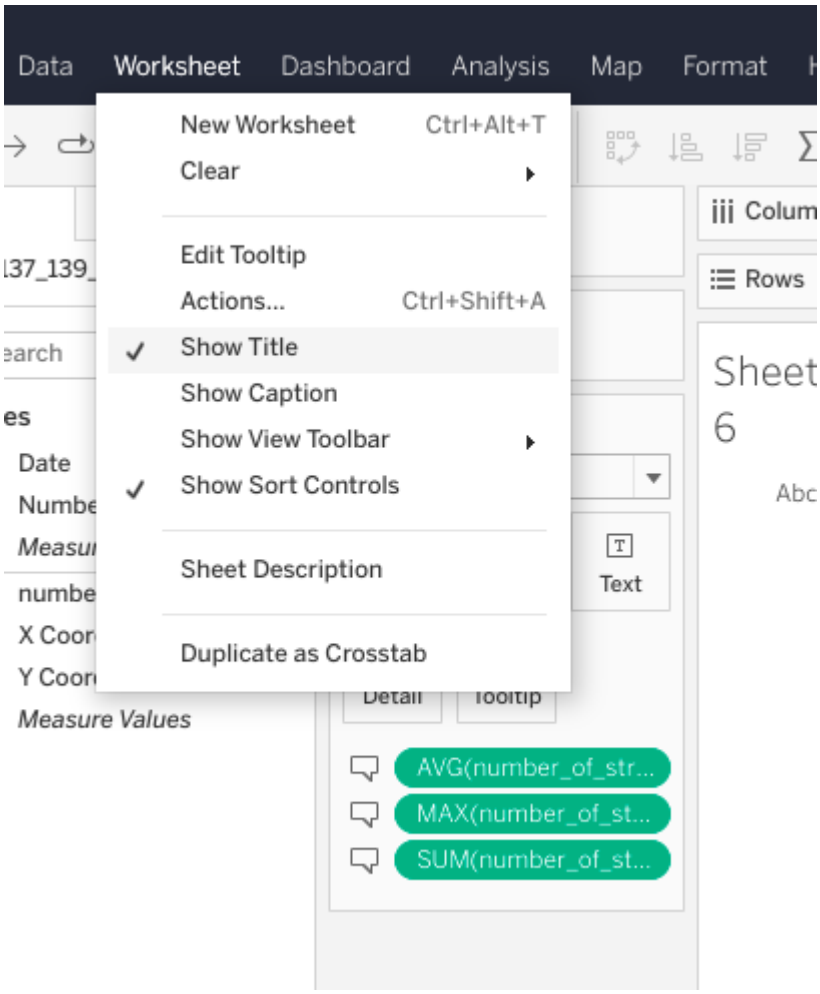
Drag calculation field to TOOLTIP again. Select MEASURE, then MAXIMUM.



Drag calculation to TOOLTIP, select MEASURE, then SUM.

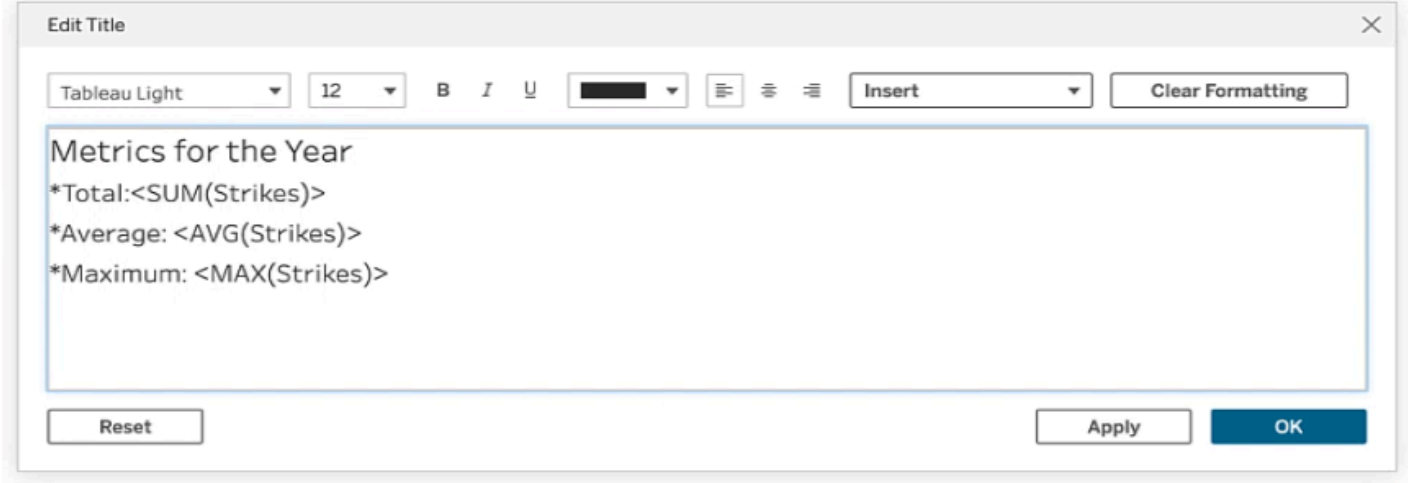


Click on WORKSHEET and select SHOW TITLE.

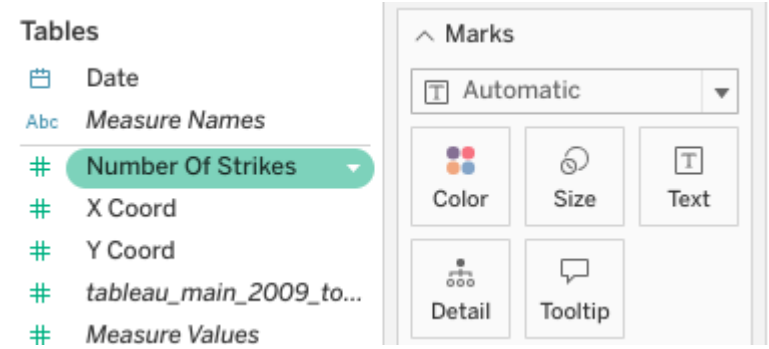


Type in ‘Metrics for the Year’ in title field.
Then add the following beneath it:

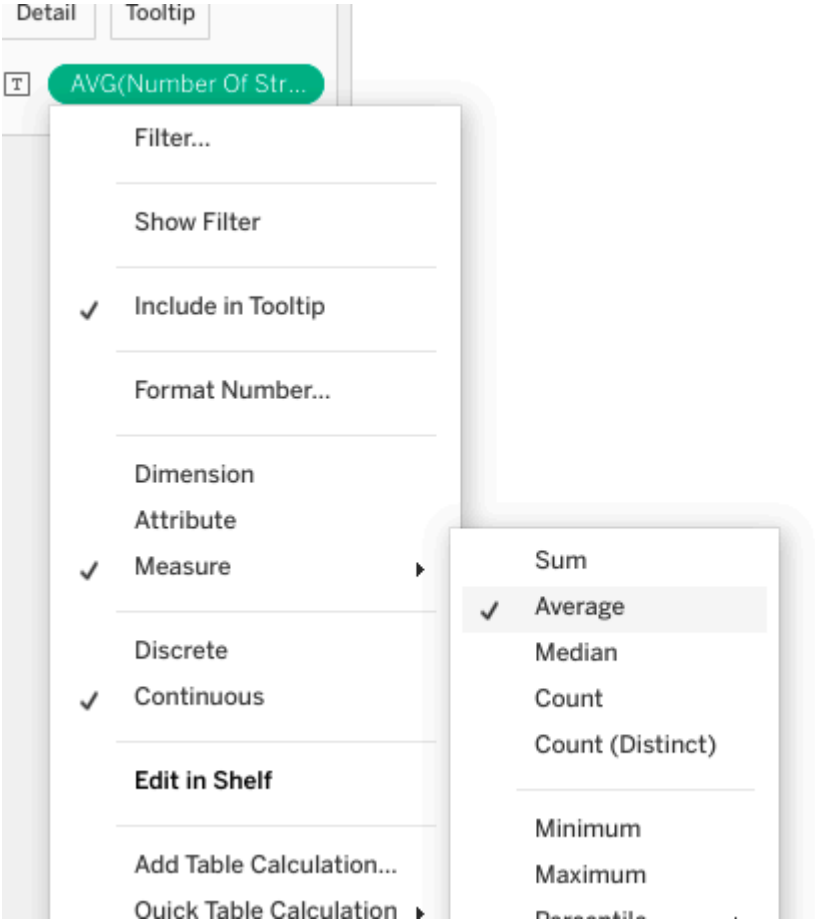
*Total: <SUM(Strikes)>
* Average: <AVG(Strikes)>
* Maximum: <MAX(Strikes)>’.
Click OK.



Sheet 3
Click on NEW WORKSHEET.
Drag NUMBER of STRIKES to the TEXT square in the MARKS field.

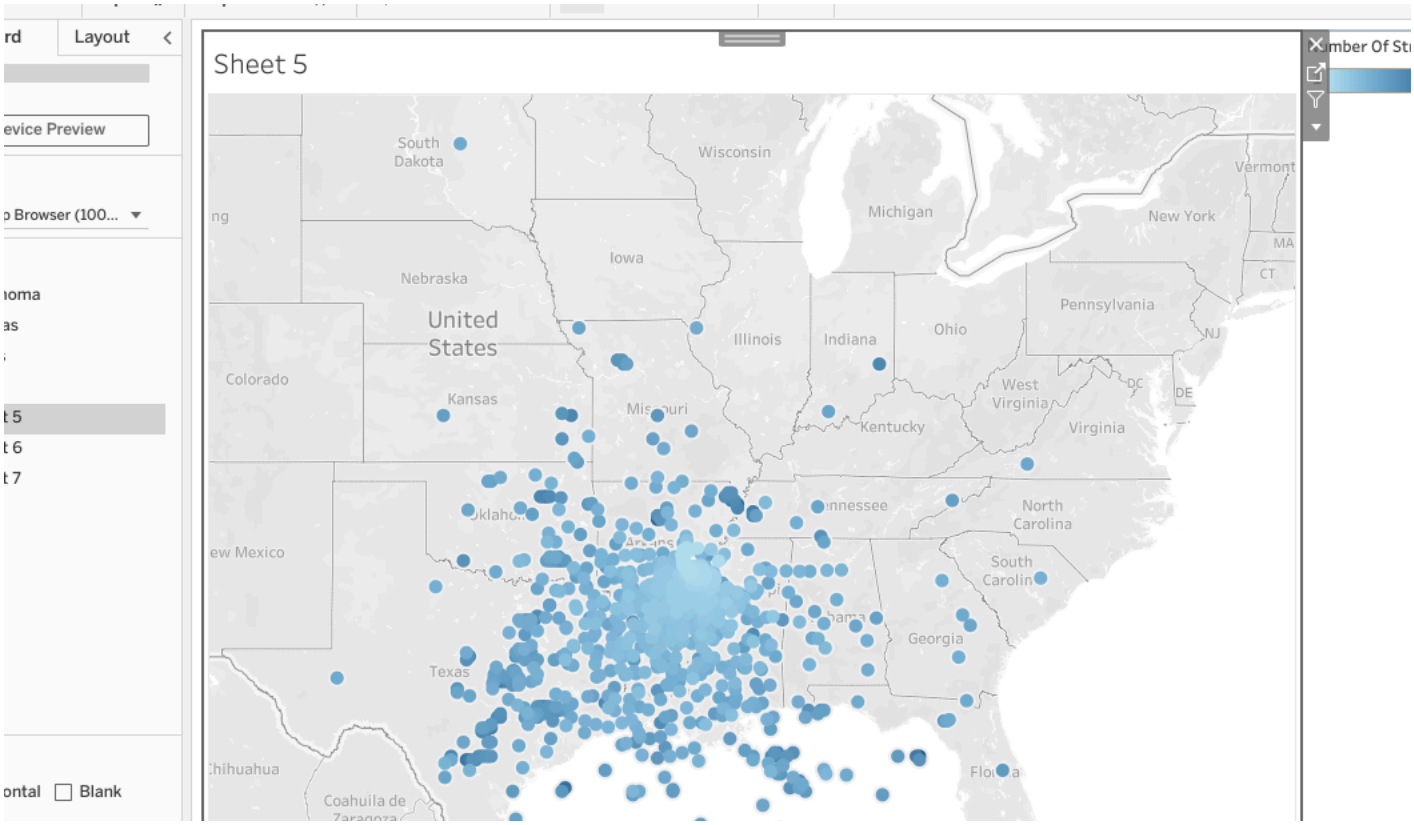


From dropdown, select MEASURE and AVERAGE.

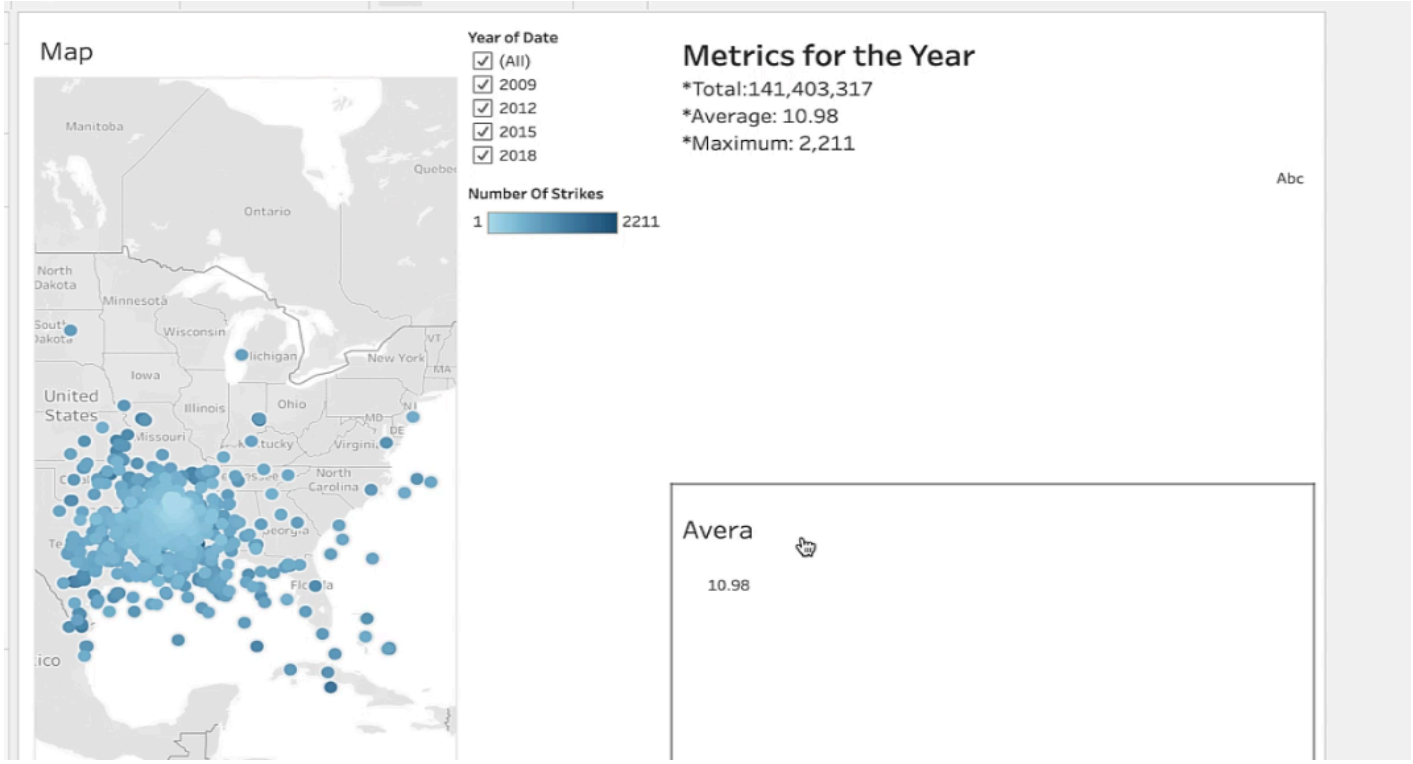


Click on NEW DASHBOARD.

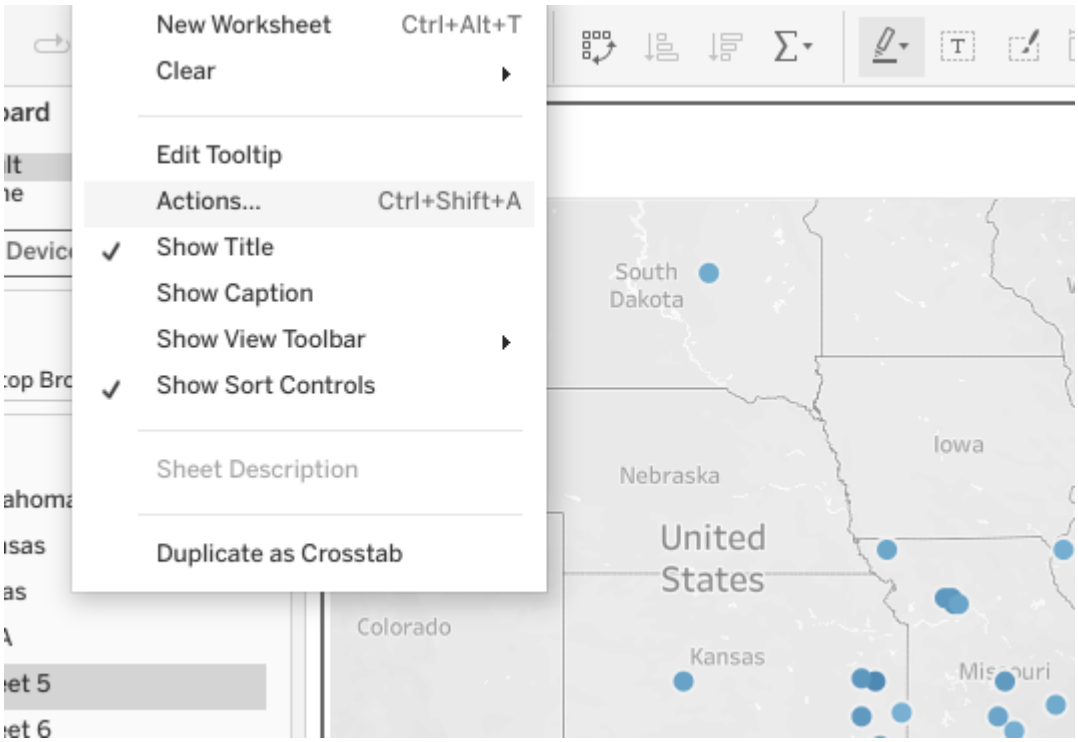
Drag USA map worksheet to empty dashboard.



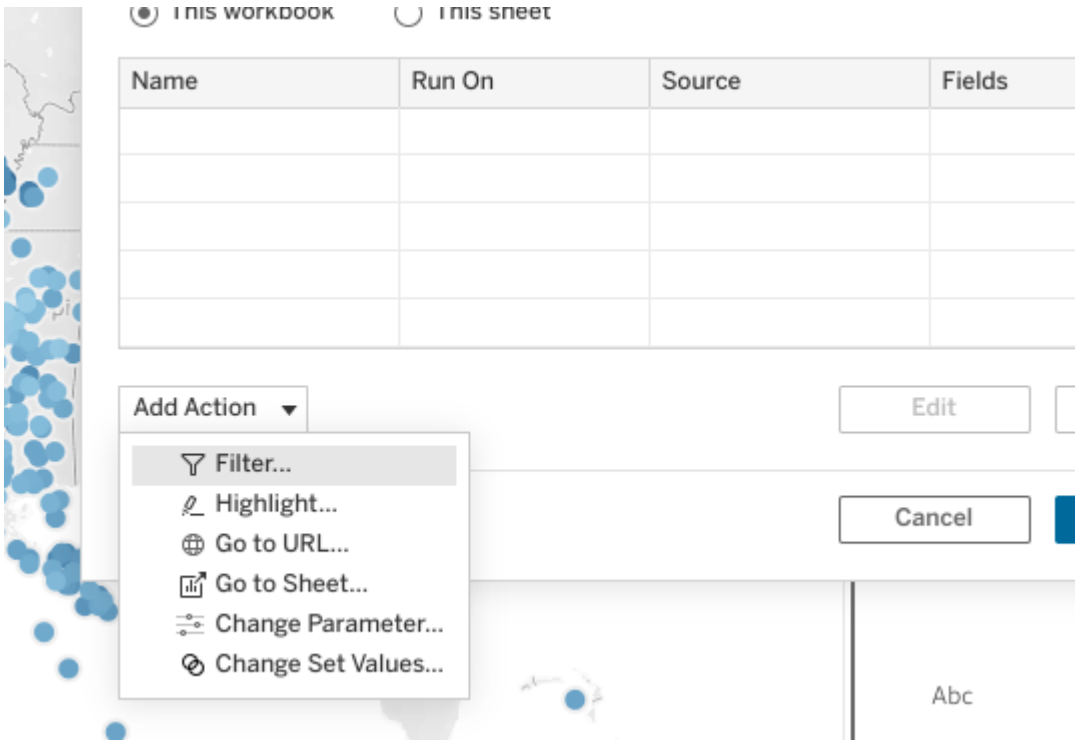
Drag your other two worksheets to the dashboard.



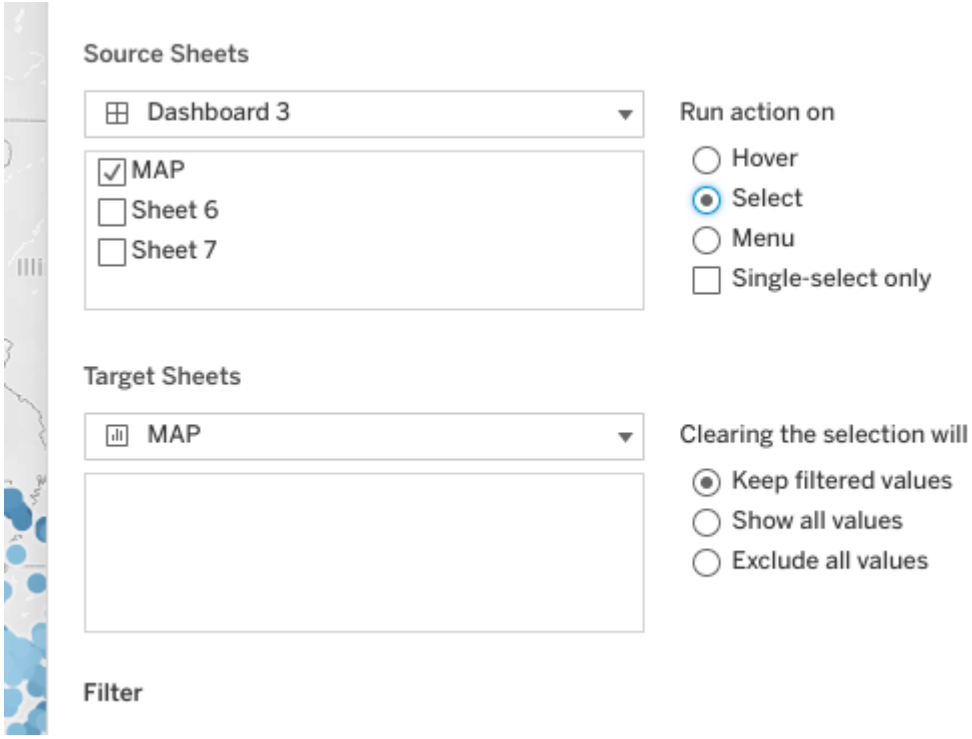
Click map, then select WORKSHEET and ACTIONS.



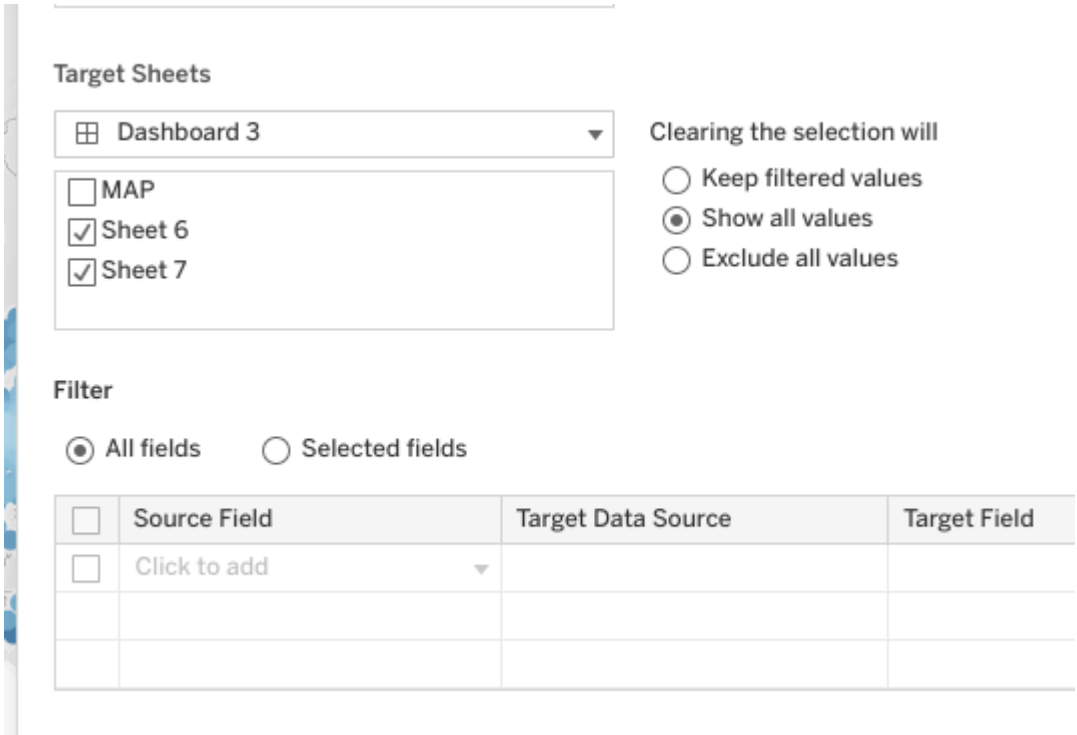
Select ADD ACTION and FILTER.



Under SOURCE SHEETS, select the dashboard you created from the dropdown.
Check the box for the map worksheet, and then choose SELECT under the RUN ACTION ON list.



Next, under the TARGET SHEETS list, select dashboard from the drop down, then check box for the other two worksheets you created.
Select SHOW ALL VALUES.
Select ALL FIELDS, under Filter.
Click OK.



Type in ‘Interactive Filter’ in Legend title field.
Type in ‘Location Metrics’ in title field.
Now you’ve created an interactive geographic dashboard that adjusts metrics each time a year or location is changed or selected. Well done!