

Follow-along guide: Work with Tableau, Part 2

This document includes detailed instructions for how to perform the data visualizations described in the video “Work with Tableau, Part 2.”

The following guide points out areas of the video that may require adjustment. These reference 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_dataset.csv.

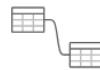
Please be aware that when you download the zip file folder provided, the computer automatically names that zip file folder with a long string of numbers and letters. You have to open that folder and then upload the individual files that are named correctly and match what's shown in the video.

(**Note:** Please allow several minutes for dataset upload.)

Before you can start designing visualizations, you'll first need to upload your data. You'll need to upload the specific dataset files to Tableau. Do not upload the entire .zip folder. When you download the zip folder from this page, your computer will automatically download a .zip file folder. The .zip folder is automatically named with a series of letters and numbers. Open that .zip folder, then save the individual dataset files. The two files are: tableau_main_2009_to_2018.csv and tableau_dataset.csv. Once you can see the individual dataset files, proceed to upload your dataset for this video to Tableau Public. Notice on the data source tab that you can see all of your column headers and Tableau icons that help you determine data types. In this case, you'll see a calendar icon, globe icons, and pound signs.

tableau_dataset

tableau_dataset.csv



Need more data?

Drag tables here to relate them. [Learn more](#)

tableau_dataset.csv ▾ 4 fields 10479003 rows

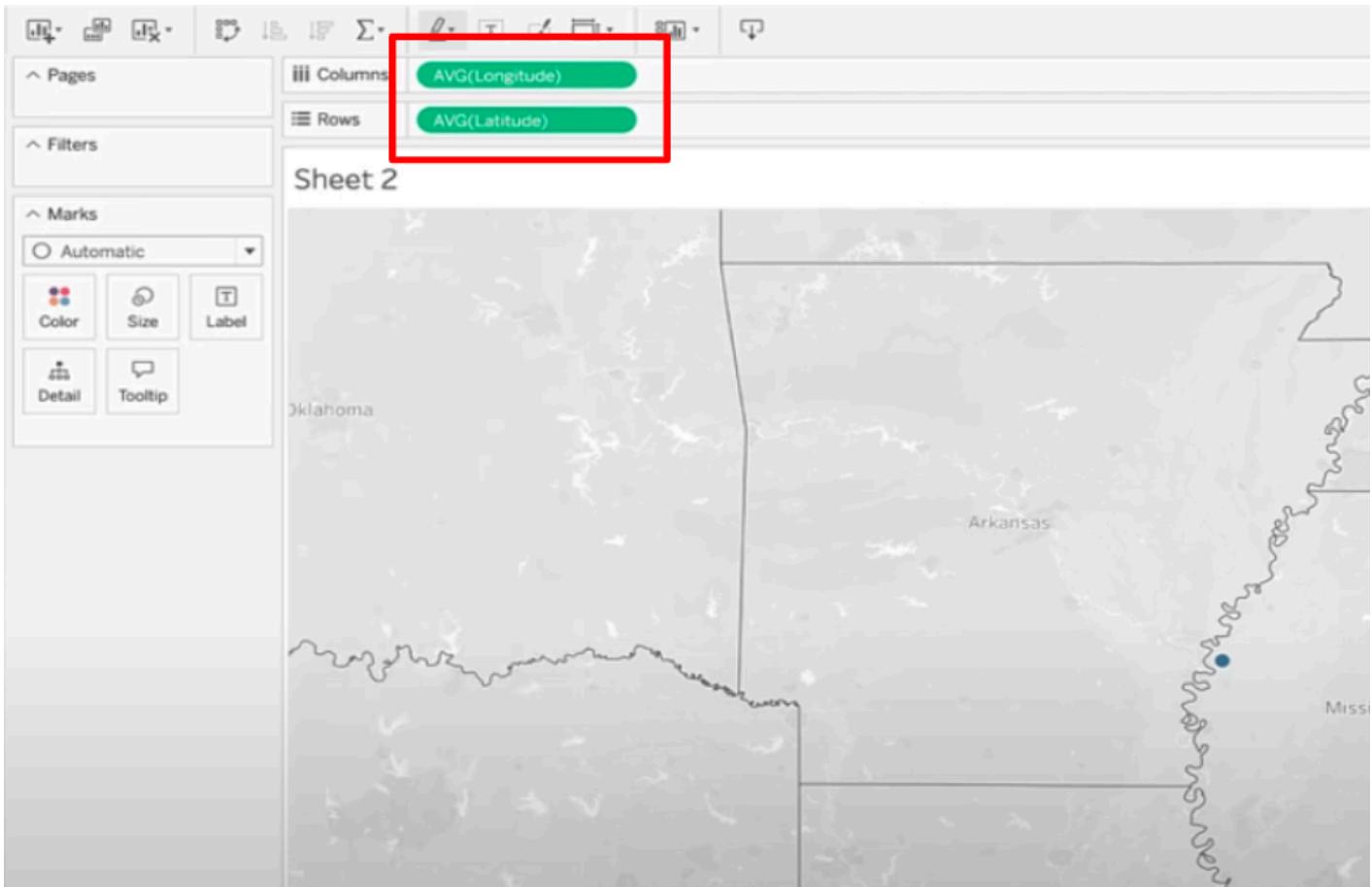
Name	Physical Table	Date	Longitude	Latitude	Number Of Strikes
tableau_dataset.csv	tableau_dataset.csv	6/8/2018	-95.6000	20.0000	1
		6/8/2018	-95.2000	20.0000	1
		6/8/2018	-83.4000	20.0000	1
		6/8/2018	-78.7000	23.0000	1
		6/8/2018	-96.3000	21.0000	1
		6/8/2018	-85.9000	22.0000	1
		6/8/2018	-85.3000	23.0000	1
		6/8/2018	-82.3000	23.0000	1

Click on NEW WORKSHEET.

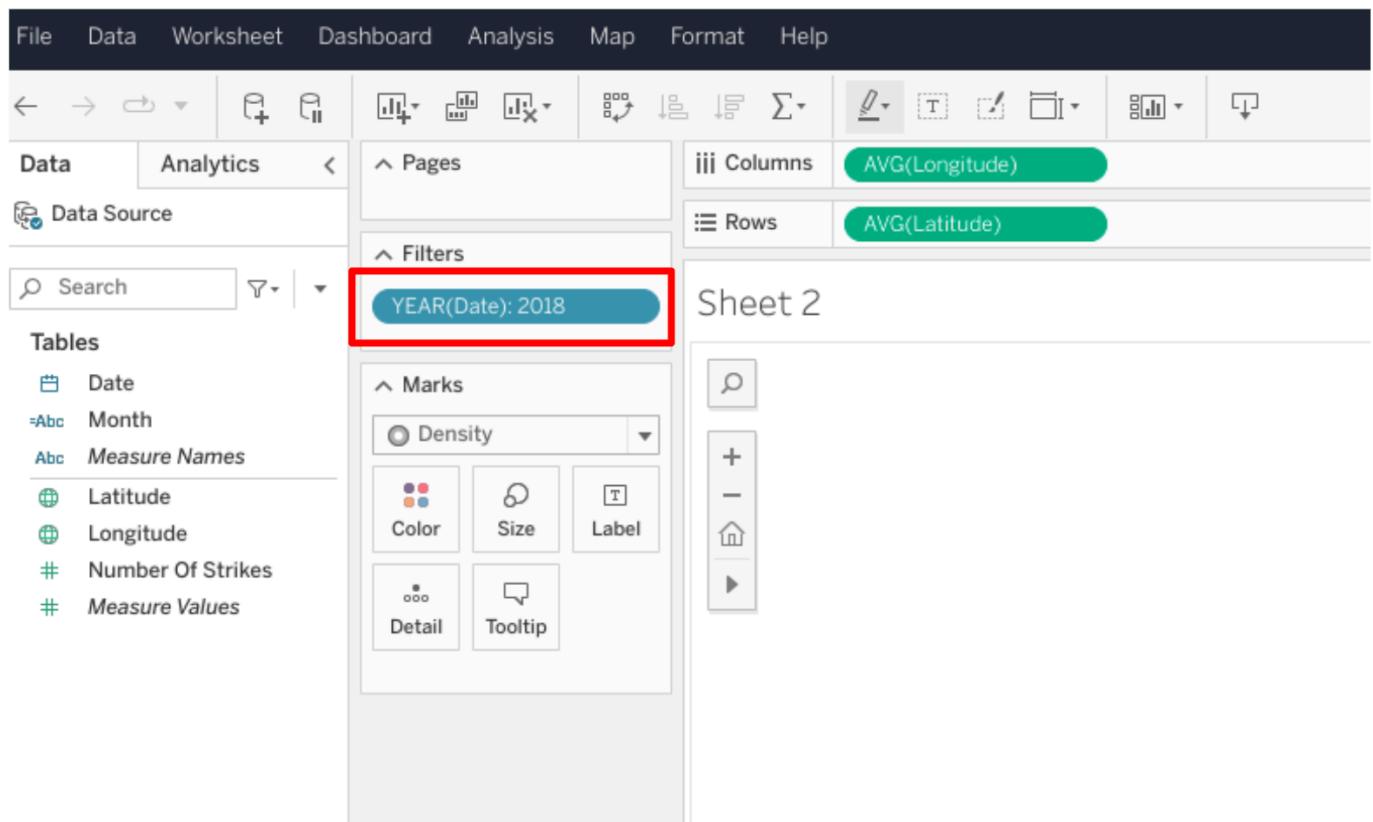
(Note: Please allow several minutes for data import into a new worksheet)

Drag LONGITUDE into the column field. Drag LATITUDE into the rows field.

(Note: Make sure the latitude and longitude fields are set to continuous dimensions)



Drag DATE into Filters field. Filter to only 2018.



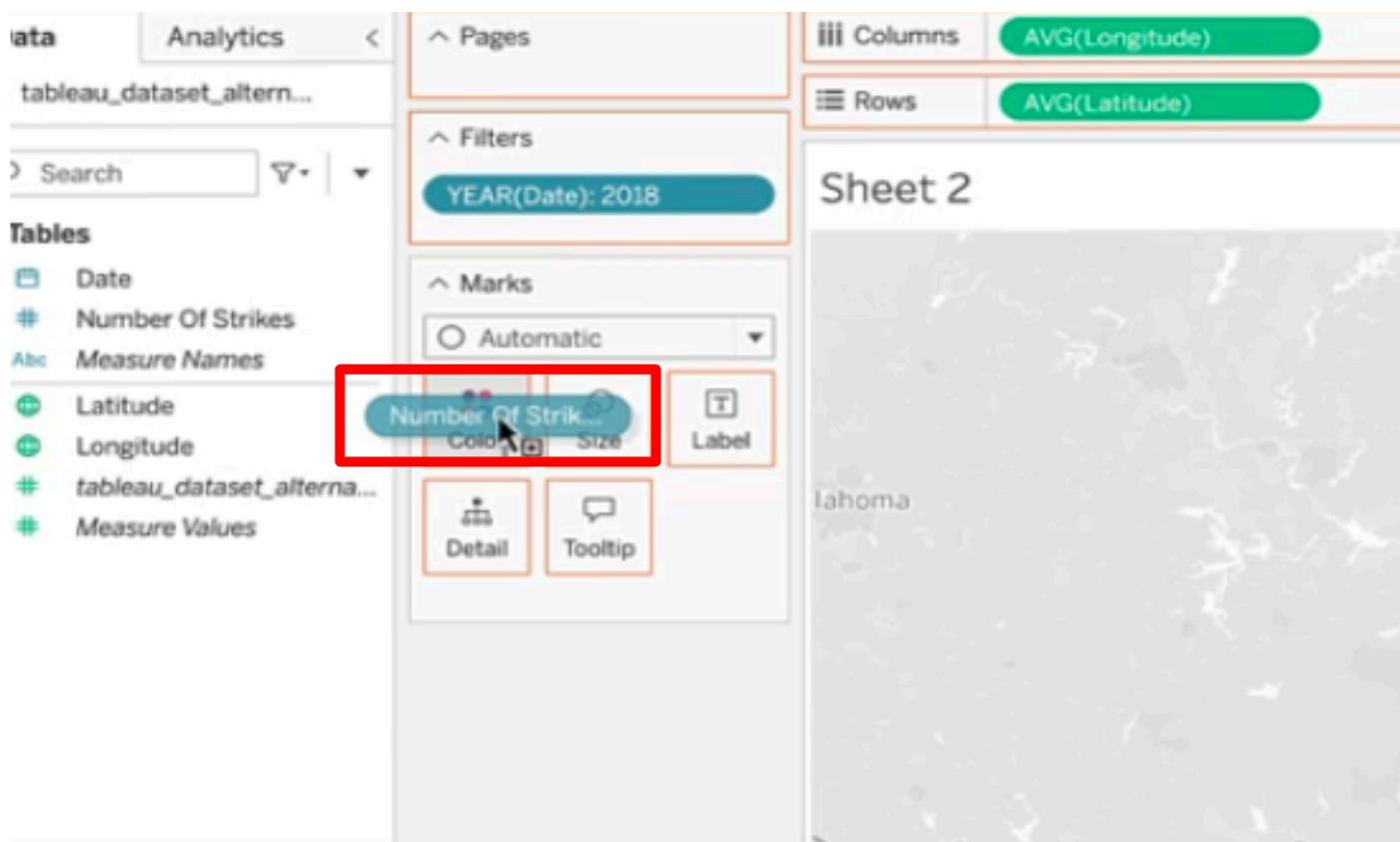
Click on NUMBER OF STRIKES dropdown.

Select “Convert to Dimension.”

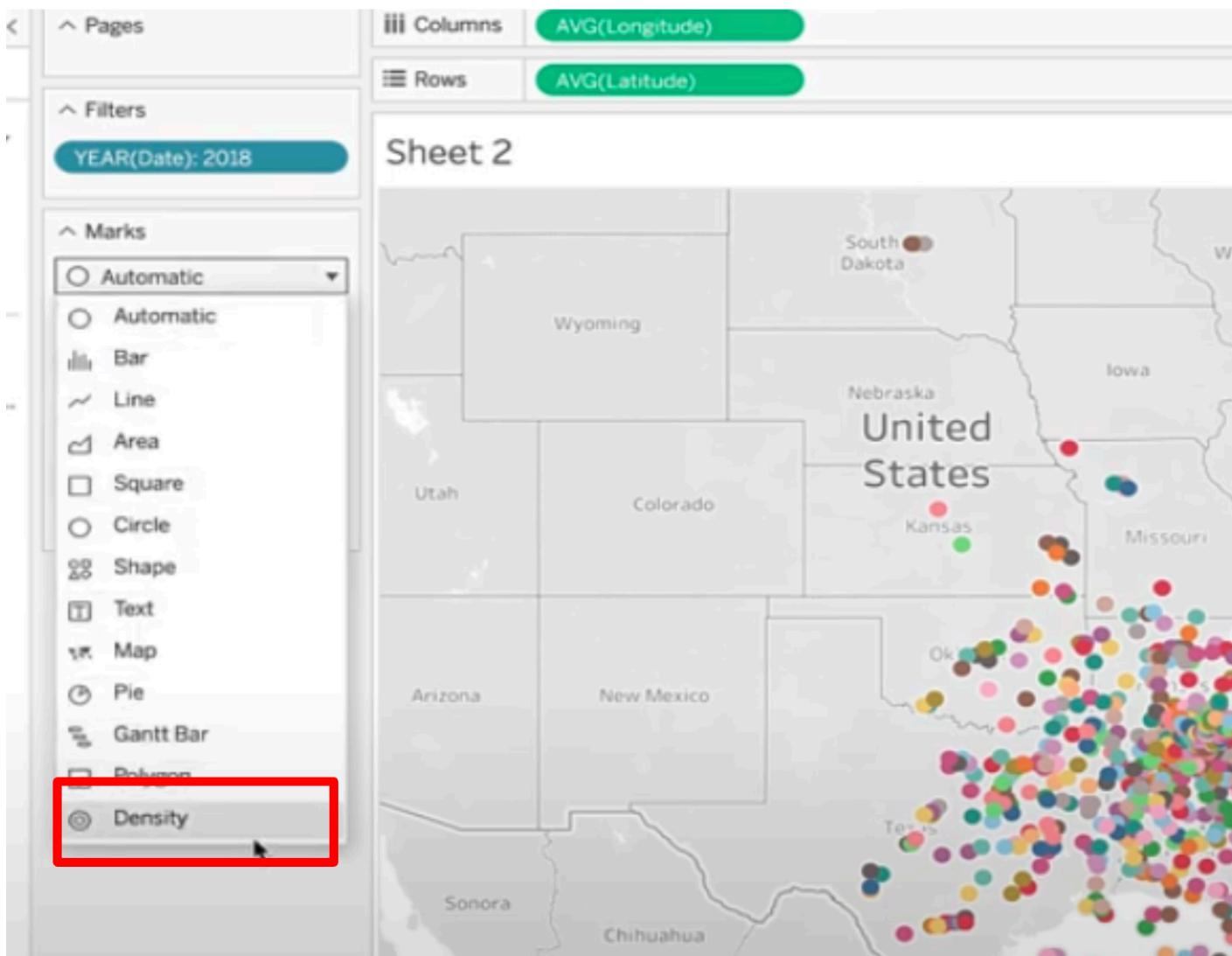
The screenshot shows the Tableau interface with the following details:

- Left Panel (Data Source):** Shows 'Analytics' selected as the current sheet. A search bar is present. Below it, under 'Tables', are 'Date', 'Measure Names', 'Latitude', 'Longitude', and 'Number Of Strikes'. 'Number Of Strikes' is highlighted with a green background.
- Center Panel (Marks Card):** Shows 'Automatic' as the mark type. Buttons for 'Color', 'Size', 'Label', 'Detail', and 'Tooltip' are visible.
- Right Panel (Sheet 2):** Displays a map of the United States with a focus on the Great Plains region. The state of Oklahoma is labeled.
- Bottom Left (Context Menu):** A context menu is open for 'Number Of Strikes'. It includes options: 'Duplicate', 'Rename', 'Hide', 'Create', 'Convert to Discrete', 'Convert to Dimension' (which is highlighted with a red box), 'Change Data Type', 'Geographic Role', 'Folders', 'Default Aggregation', and 'Describe...'.

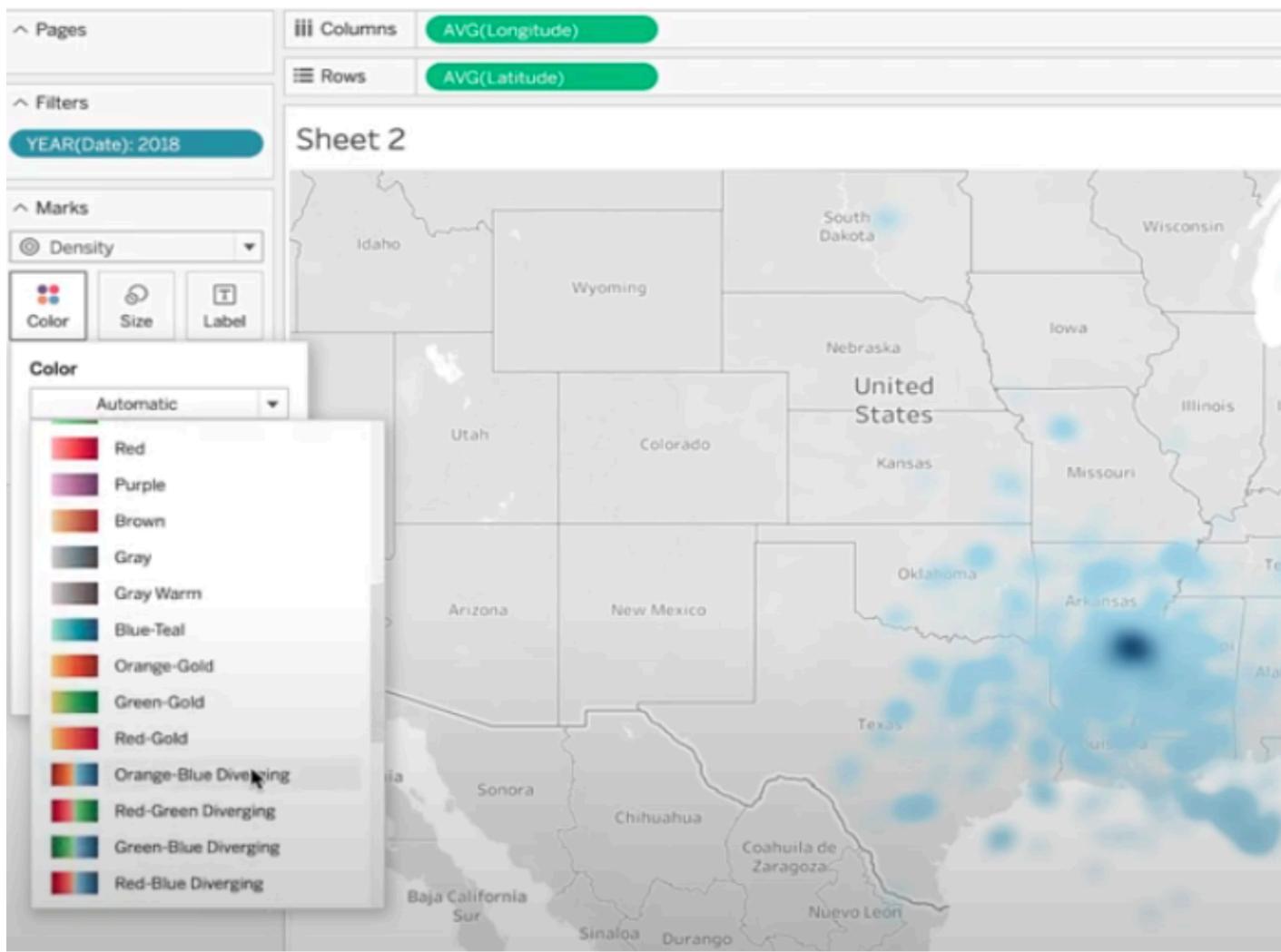
Drag NUMBER of STRIKES to the box labeled COLOR.



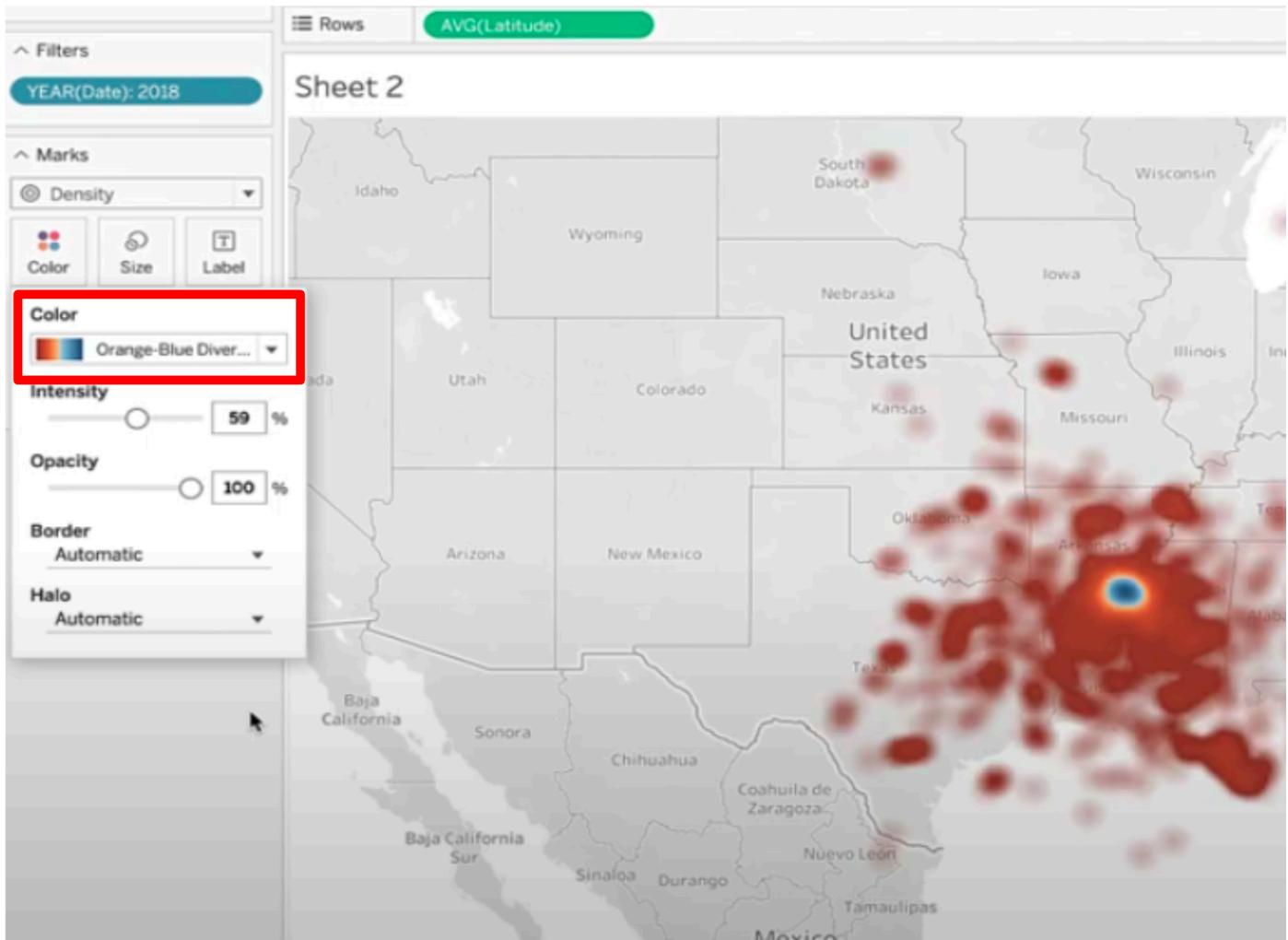
Select Density in MARKS dropdown.



Click on color and show the dropdown. Select any color you'd like.

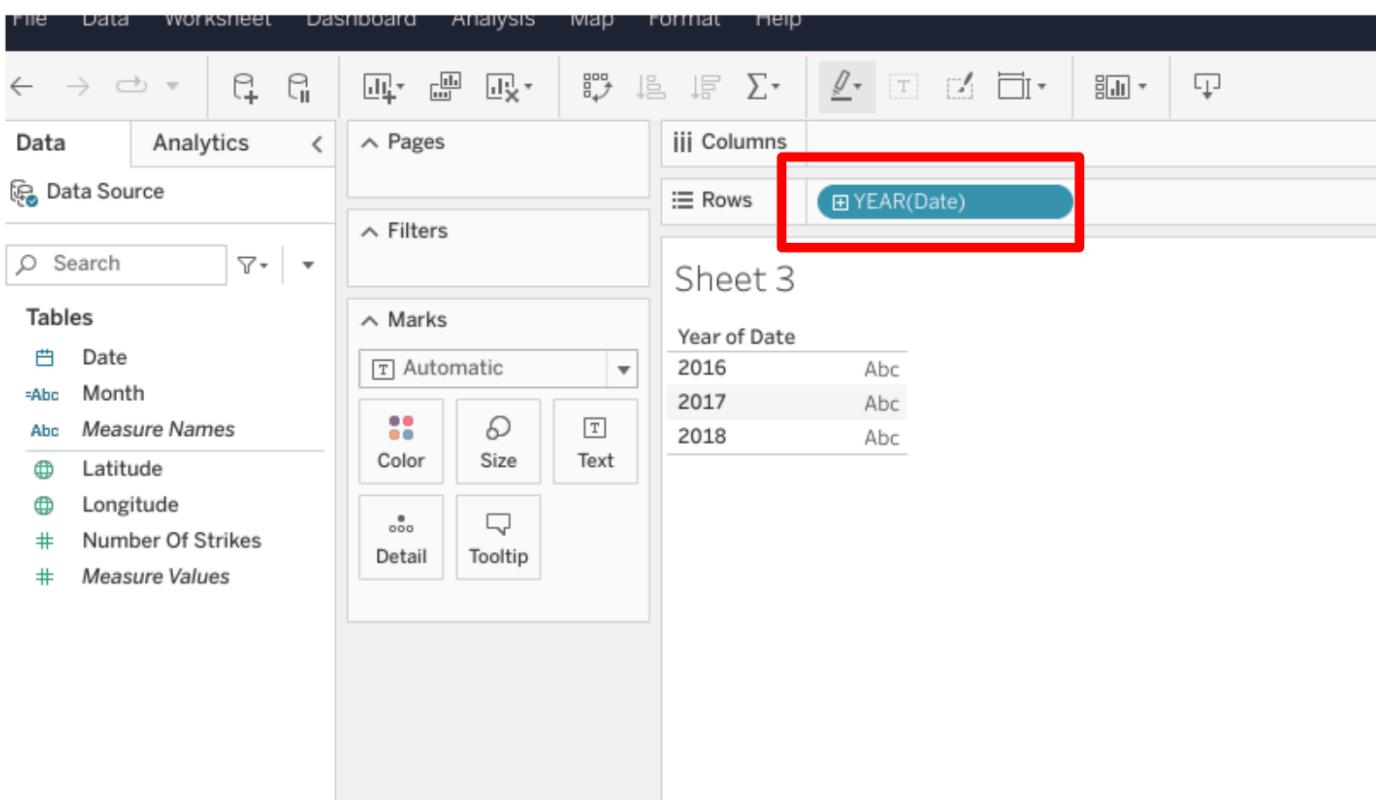


And here is your geographic map of the location of lightning strikes in the U.S. in 2018.



Click on “new worksheet.”

Drag DATE to the ROW field and select YEAR.



Click on DATE dropdown in the “Tables” menu. Click CREATE and select Calculated Field.

The screenshot shows the Tableau Data pane. The 'Date' table is selected. A context menu is open from the 'Create' option, with 'Calculated Field...' highlighted by a red box.

Year of Date

Year of Date	Value
2016	Abc
2017	Abc
2018	Abc

Type in Month for Calculated Field name.

Type into field:

```
LEFT(DATENAME('month',[date]),3)
```

Click Apply.

Click OK.

Drag month to column field.

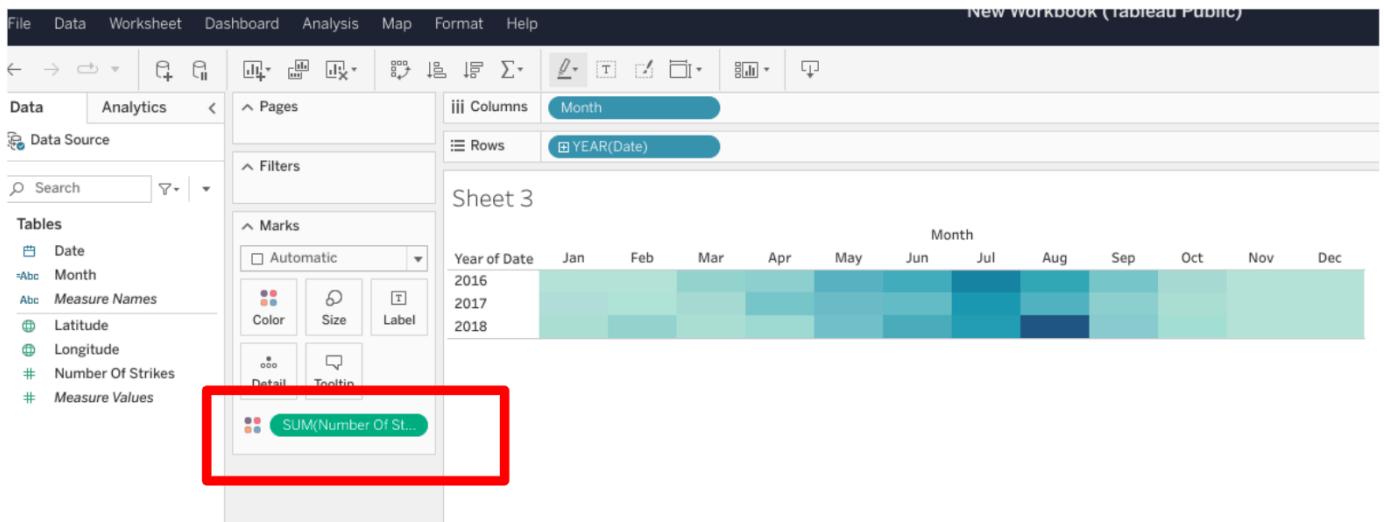
The screenshot shows the Tableau interface with the 'Month' field dragged into the 'Columns' shelf under the 'Sheet 3' view. The 'Month' field is highlighted by a red box.

Sheet 3

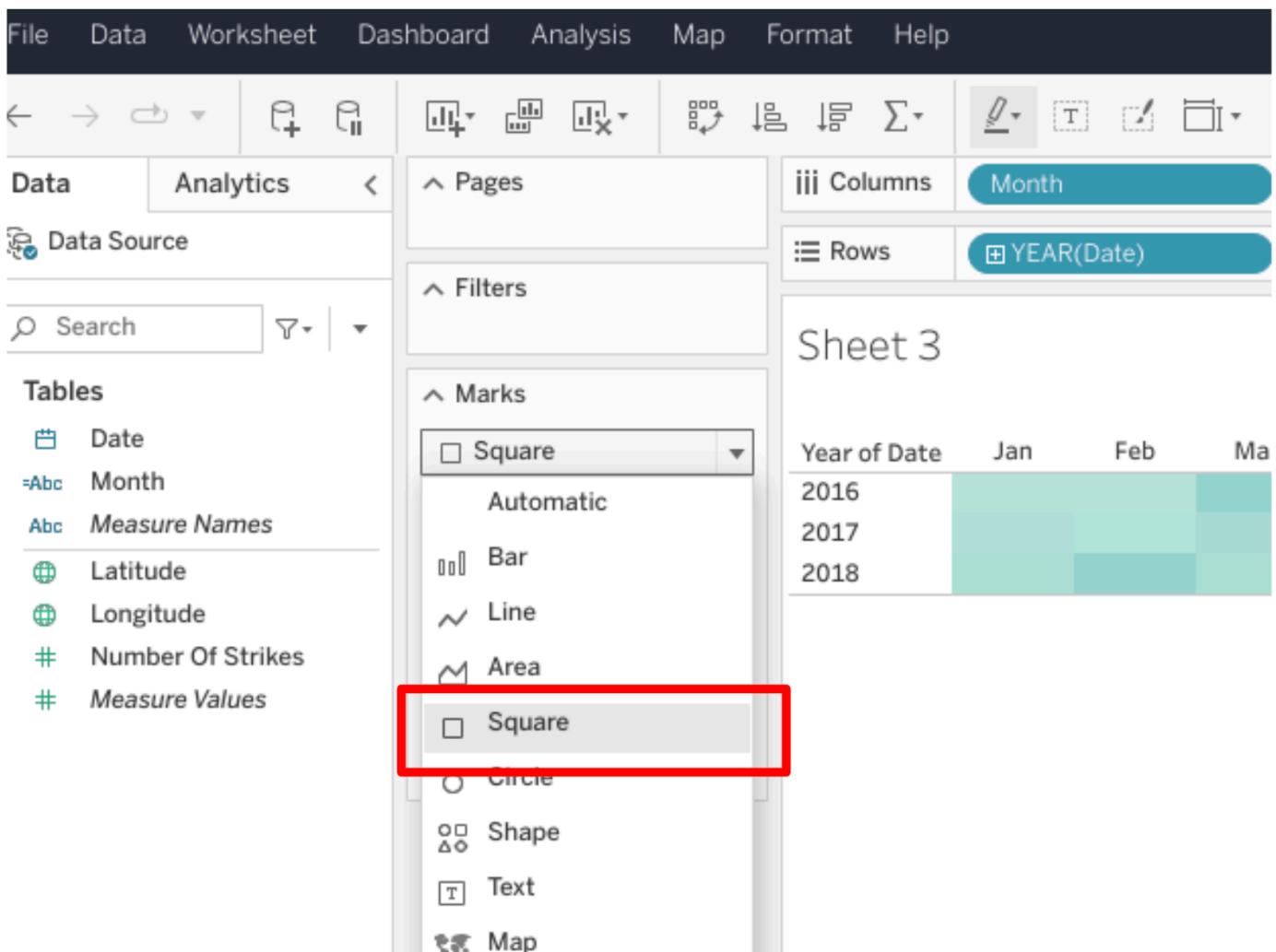
Year of Date	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2016	Abc											
2017	Abc											
2018	Abc											

Drag NUMBER of STRIKES to the color square under the MARKS field.

Make sure NUMBER of STRIKES is converted to Measure. To do so, right click on Number of Strikes field and select 'Convert to Measure.'



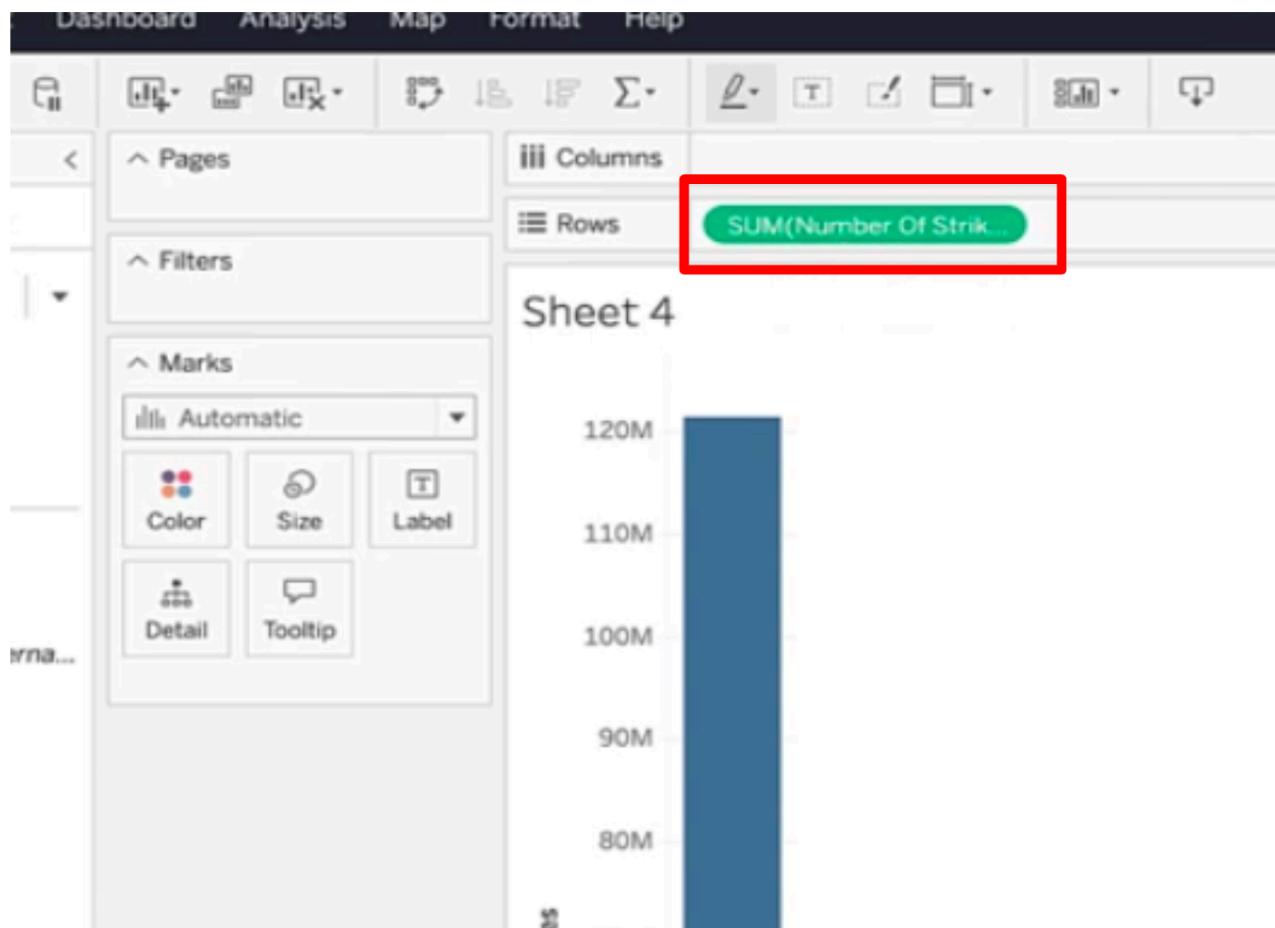
In Marks dropdown, select SQUARE.



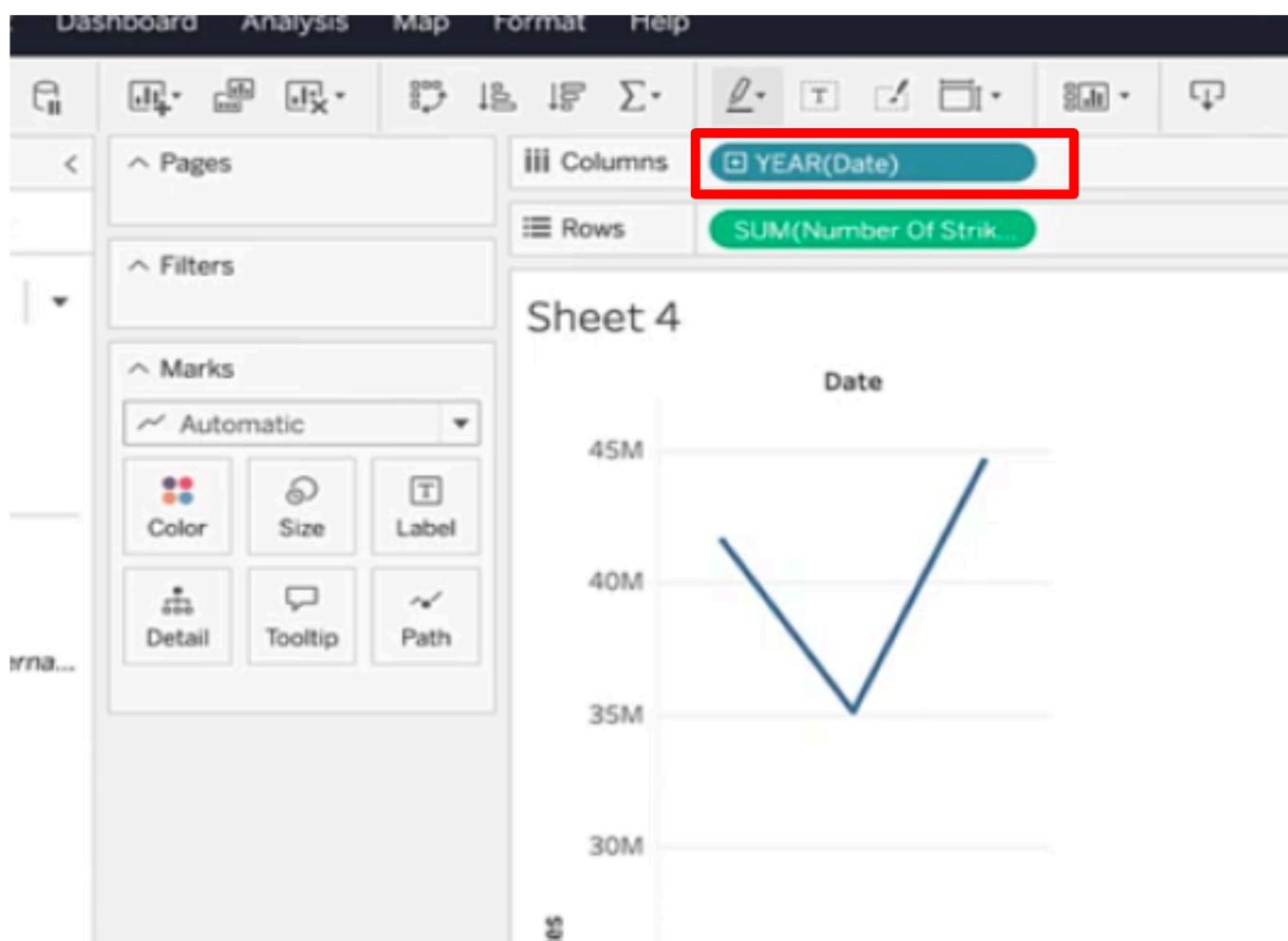
Feel free to change the color. You've completed a heatmap.

Click on NEW WORKSHEET.

Drag NUMBER OF STRIKES to the rows field.

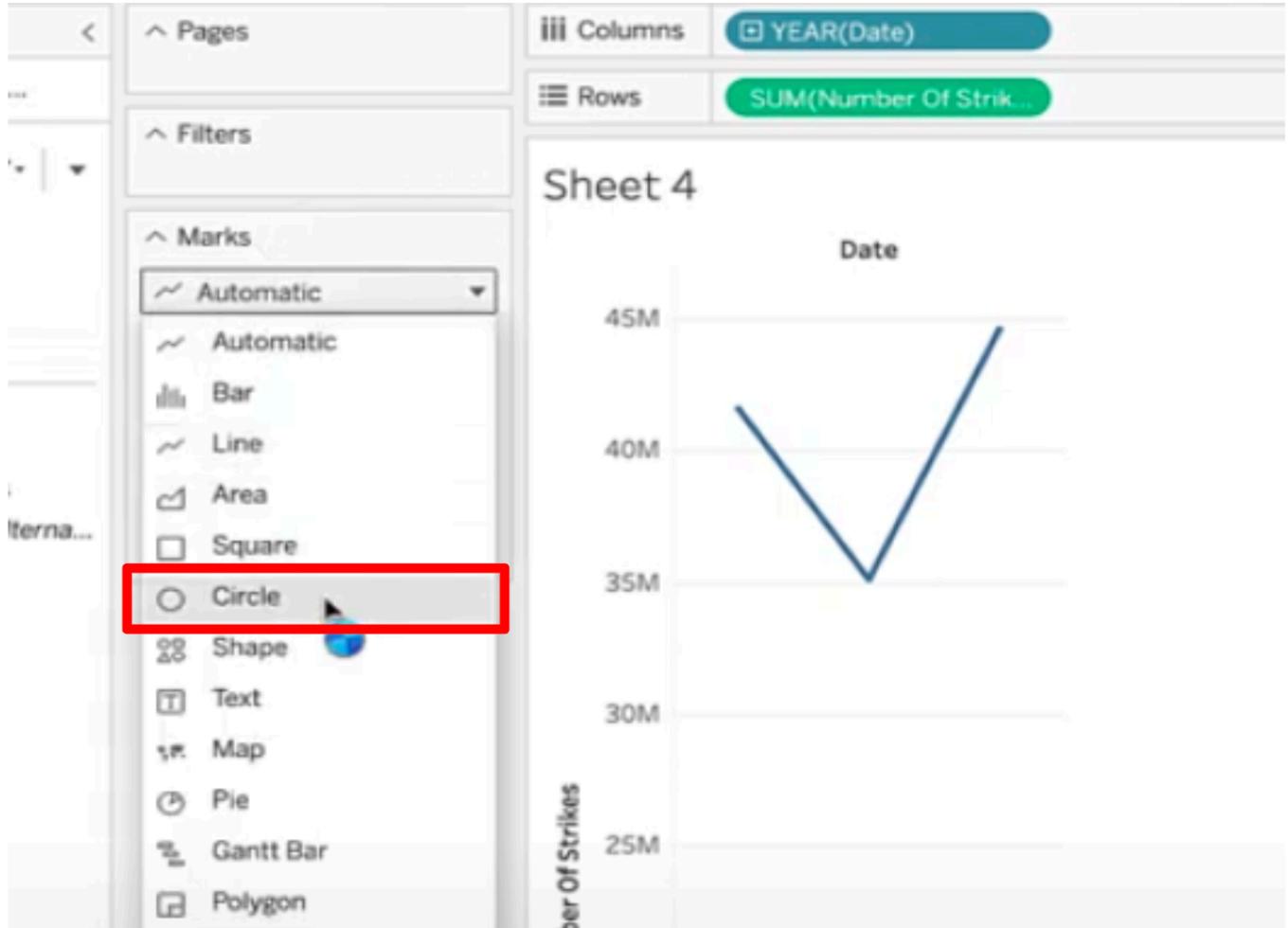


Drag DATE to the column field and select YEAR.



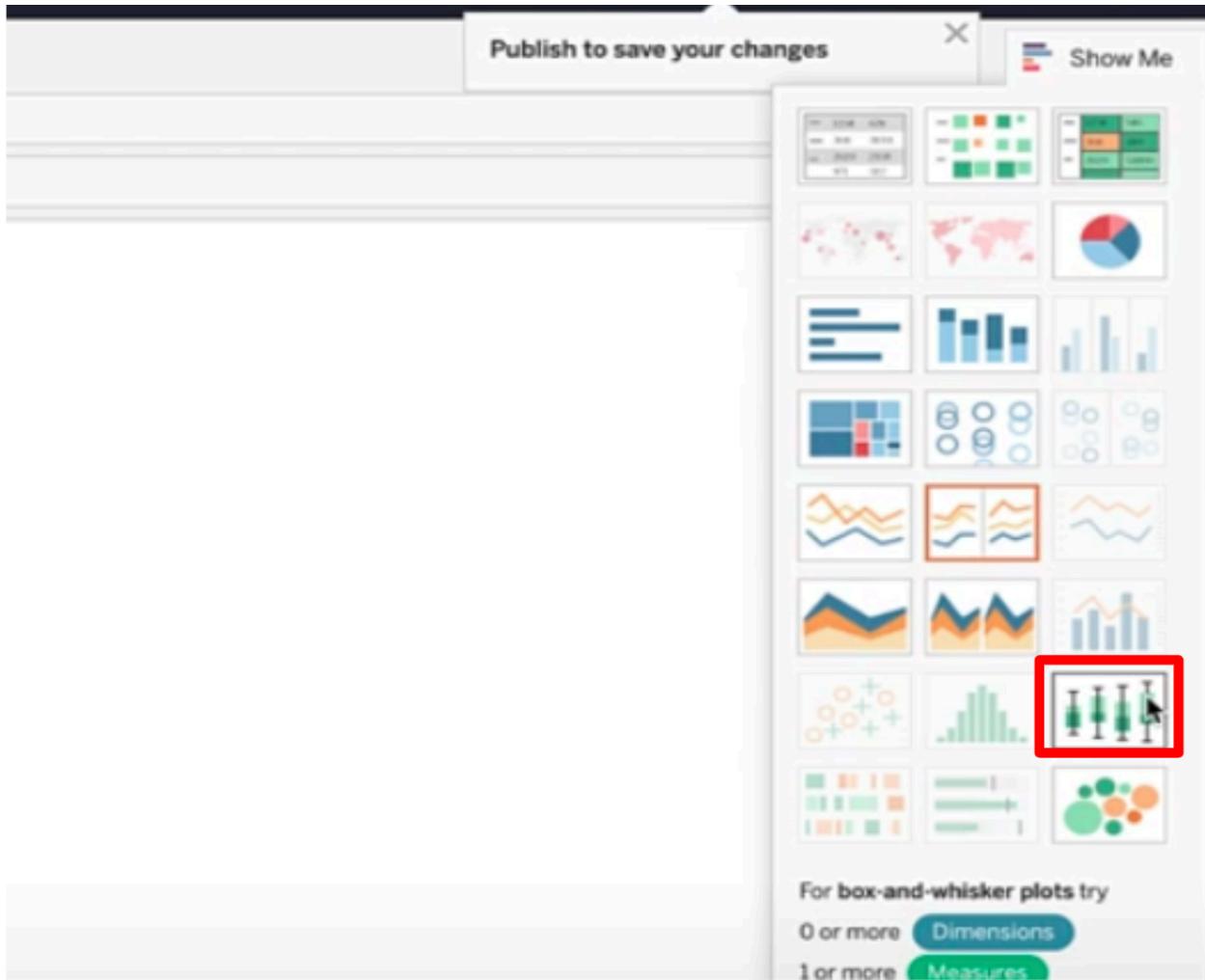
Note: If nothing is shown in the Columns field, drag YEAR back to the Columns filter again.

Select CIRCLE from MARKS dropdown.



Note: If box plot isn't the default, select the BOX and WHISKER PLOT from the SHOW ME dropdown.

Drag Date to the column field again, if that has been removed.



Drag DATE into the detail square under the MARKS field, and select DAY. **Note:** When you do this, you'll see that Tableau changes your YEAR(Date) filter to QUARTER(Date) to show an additional level of detail. That change is shown in the instructional video, so please proceed.

Now you've completed a boxplot.

Click on NEW WORKSHEET.

Click on the dropdown of NUMBER of STRIKES in Table menu, and select CREATE and then BINS.

Tables

- Date
- =Month
- Measure Names

Latitude

Longitude

Number Of Strikes

#

Add to Sheet

Duplicate

Rename

Hide

Create

Convert to Discrete

Convert to Dimension

Change Data Type

Geographic Role

Folders

Default Aggregation

Describe...

Marks

Circle



Color



Size



Label



Detail



Tooltip



DAY(Date)

Calculated Field...

Group...

Bins...

Parameter...

Give bin a name: BIN STRIKES.

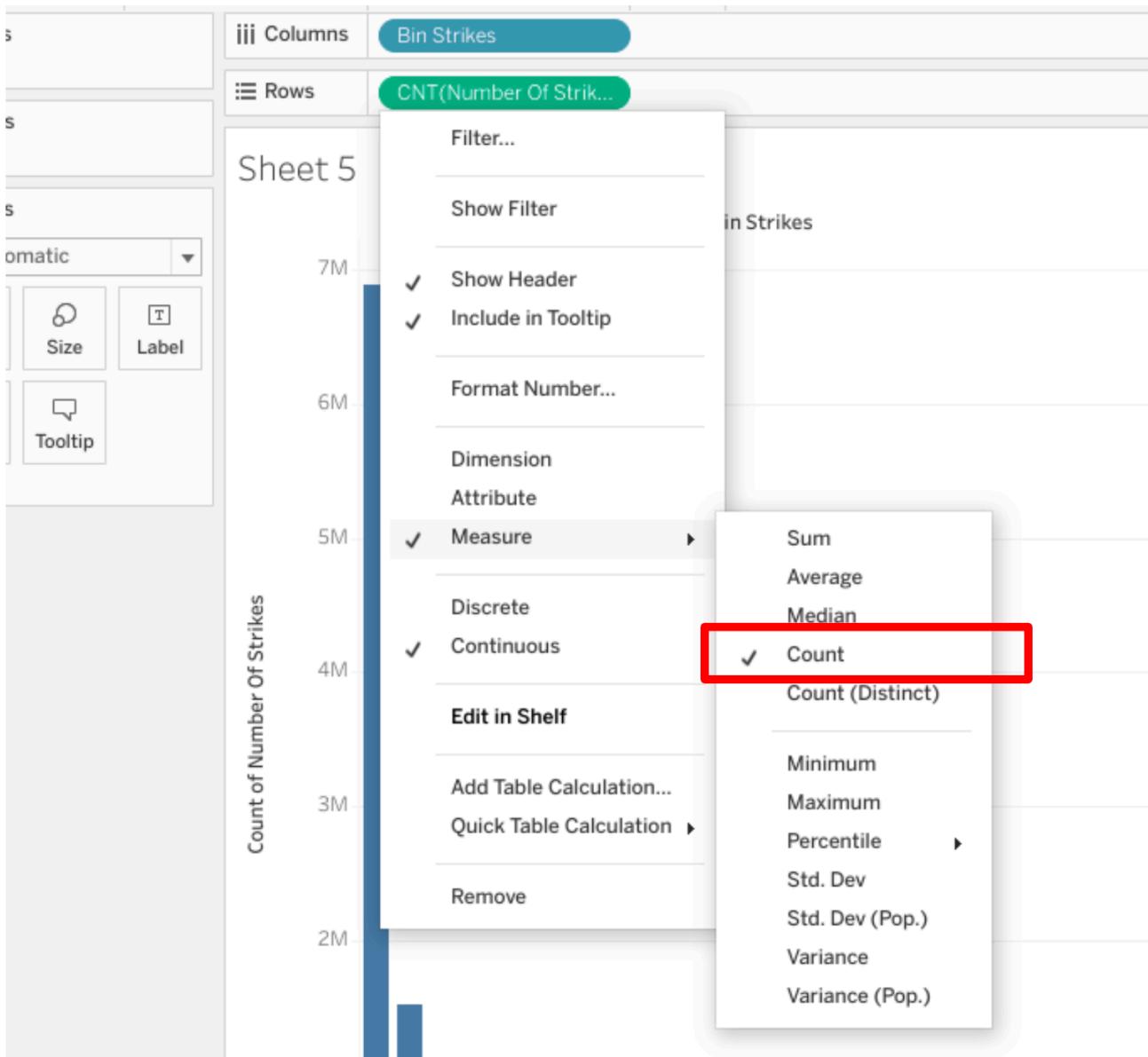
Select a number between 5 and 10 for "Size of Bins" field.

Drag BIN STRIKES to columns field.

The screenshot shows the Tableau interface with the 'Bin Strikes' field selected in the 'Columns' shelf. The 'Marks' card is set to 'Automatic'. The data view on the right shows five bins labeled 0, 7, 14, 21, and 28, each containing the value 'Abc'.

Drag NUMBER OF STRIKES to Row Field.

In NUMBER of STRIKES dropdown, make sure COUNT is selected.



Drag NUMBER of STRIKES to filter field.

Limit the field numbers between 1 and 200.

Drag NUMBER of STRIKES to the LABEL.

Select COUNT.

Change color as desired.

Now you know how to create a histogram!

