Data Visualization Lab
The Tableau Workspace

Dec. 16, 2022

Is there anything you want to ask about Lecture 4?

# The Tableau Workspace
Tableau Stories

Story points

So far we have seen how to create a dashboard and how to hide and unhide sheets. At this point we can start designing our story.

To start building your story:

➜ Open the **Shipping Dashboard** tab;
➜ Use the **Got to Sheet** icon to open up the first hidden sheet;
➜ Right-click on the tab of the sheet you have just opened and select **Unhide Sheet**;

Repeat the operation for all the hidden sheets.
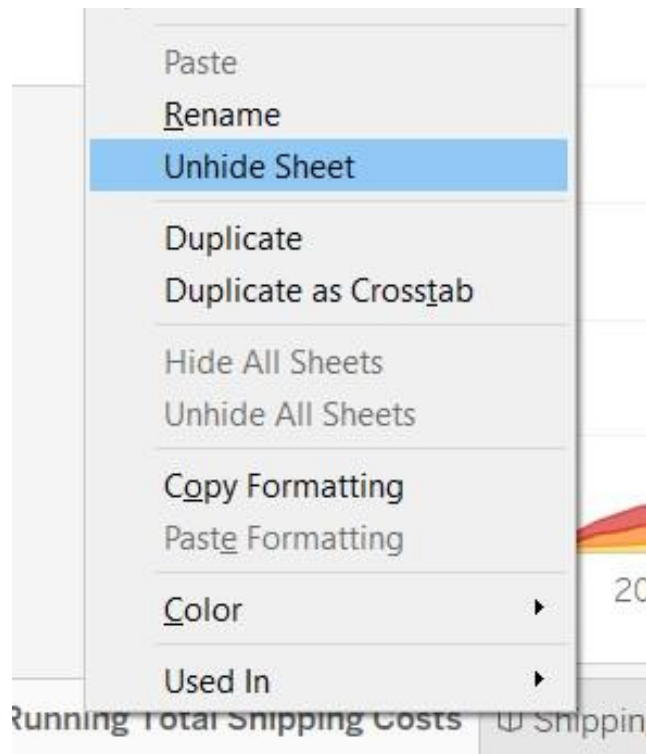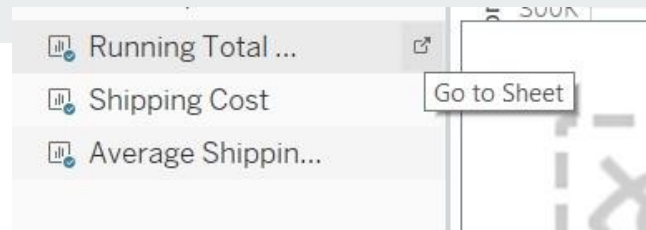
Create a new story

To create a new story, click on the **corresponding icon** in the bar at the bottom of the interface.

Which one is the Story icon? (spoiler: 📖)
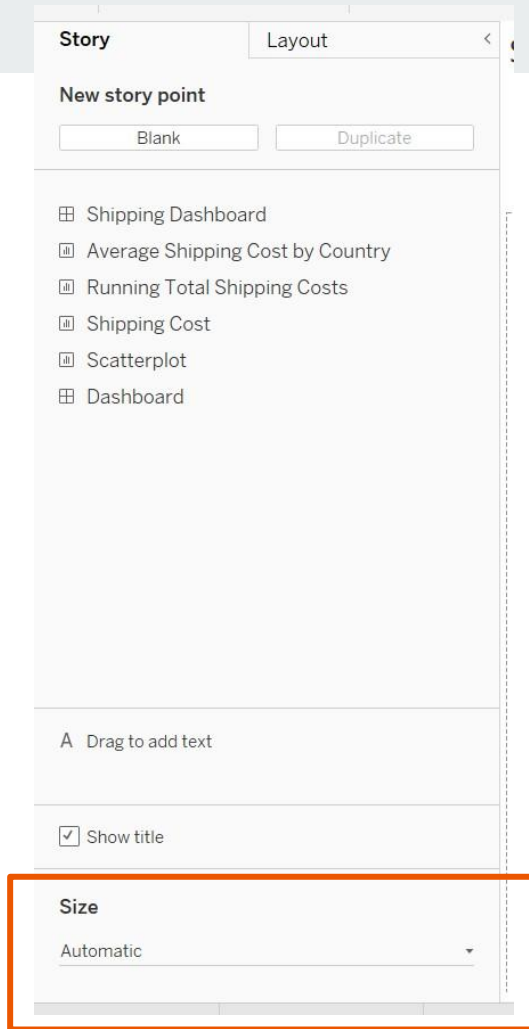
Create a new story

To create a new story, click on the **corresponding icon** in the bar at the bottom of the interface.

Which one is the Story icon? (spoiler: 📖)

The first thing we can do is adjust the size of the story, just as we did with the dashboards previously.

Set the size mode to **Automatic** for simplicity.

Building the story is also equivalent to building the dashboard, so drag and drop the first view (**Avg Shipping Cost by Country**) onto the canvas.

Story	Layout	‹

New story point

Blank	Duplicate

⊞ Shipping Dashboard
▦ Average Shipping Cost by Country
▦ Running Total Shipping Costs
▦ Shipping Cost
▦ Scatterplot
⊞ Dashboard

A   Drag to add text

☑ Show title

Size

Automatic ▾

Story Title

Add a caption

Category
- ⊙ (All)
- ○ Furniture
- ○ Office Supplies
- ○ Technology

Avg. Shipping Cost

1,2   295,6

© 2022 Mapbox © OpenStreetMap

Create a new story

Adjust the Navigator box

We can give this visualization a description, using the gray box (**Navigator box**) above the map.

If the box is not large enough to contain your caption, you can enlarge it as you would an image on any other tool.

Create a new story

Change the Navigator style

If you want to use a different style of navigation instead of caption, you can change the navigation style from the **Format** panel on the left side of the screen and choose whether to use:

➔ Caption;
➔ Numbers;
➔ Dots;
➔ Arrows only.
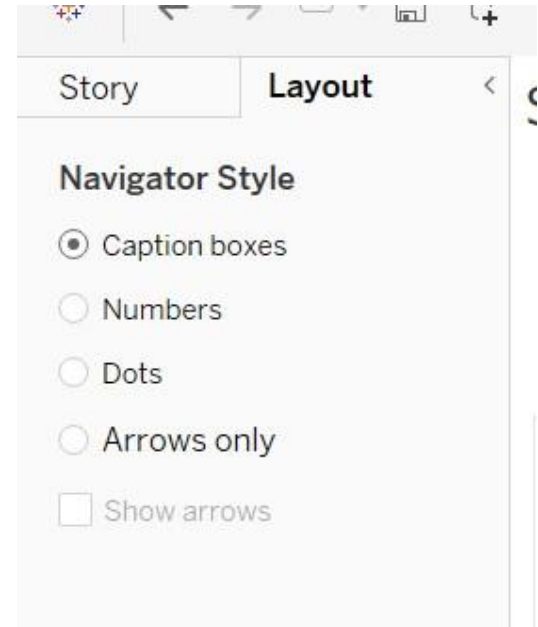
Create a new story

Update a Story point

Now suppose we want to change the filter so that only the **Office Supplies** category is displayed.

Note that a <u>toolbar</u> has appeared above the Navigator box.

Story Title

Costs are even worldwide: is that true for all Categories?

Category
- ○ (All)
- ○ Furniture
- ◉ Office Supplies
- ○ Technology

Avg. Shipping Cost

1,2   149,0

© 2022 Mapbox © OpenStreetMap

Create a new story

Update a Story point

A major benefit of Story Points is the ability to <u>preserve a specific state</u> of a given visualization – like a filter or highlighting.

Use the **Update icon** in the toolbar to update the story point to the current state.

If you click on the **Update icon**, the Navigator box will turn green and confirm that the story point has been updated.
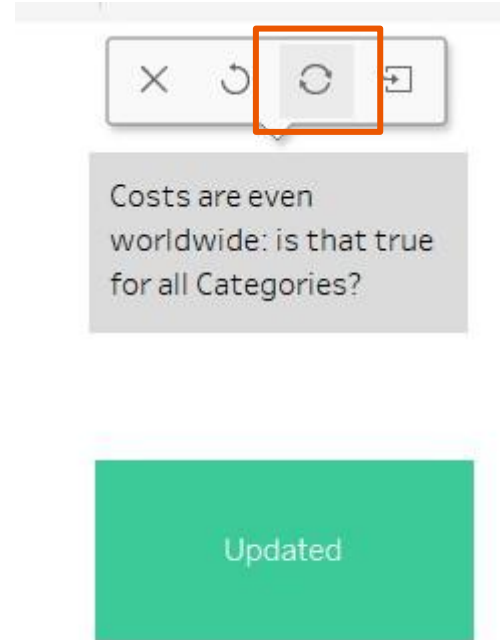
Create a new story

Update a Story point

If you have not yet updated the story point and want to return it to its previous state, use the **Revert button** instead.
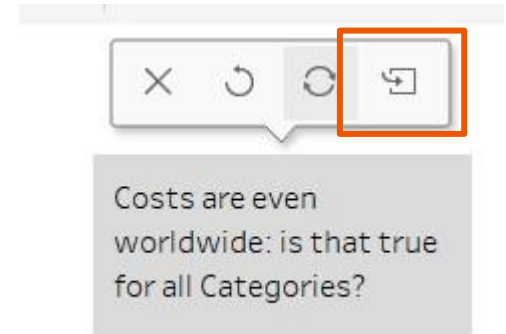

Costs are even worldwide: is that true for all Categories?

Create a new story

Update a Story point

Suppose instead we want to save the filtered map to Office Supplies at a <u>new story point</u>. We can use the **Save as new icon**.

Costs are even worldwide: is that true for all Categories?

Story Title

Category
- ( ) (All)
- ( ) Furniture
- (•) Office Supplies
- ( ) Technology

Avg. Shipping Cost

1,2   149,0

© 2022 Mapbox © OpenStreetMap

Tableau - Story Points

New story point

Blank | Duplicate

Shipping ...
Average Shippin...
Running Total ...
Shipping Cost
Scatterplot
Dashboard

A Drag to add text

☑ Show title

Size

Automatic

Create a new story

Add new Story Points

We can add new points to the story in several ways:

➔ Blank button: we can click the **Blank button** in the left-hand pane, then drag and drop the content that we want onto the canvas;

Create a new story

Add new Story Points

We can add new points to the story in several ways:

➔ Blank button: we can click the **Blank button** in the left-hand pane, then drag and drop the content that we want onto the canvas;

➔ Double-click: double clicking a piece of content from the Story pane brings it into the story;

Create a new story

Add new Story Points

We can add new points to the story in several ways:

➔ Blank button: we can click the **Blank button** in the left-hand pane, then drag and drop the content that we want onto the canvas;

➔ Double-click: double clicking a piece of content from the Story pane brings it into the story;

➔ Drag something to the Navigator bar: bring a sheet out to a specific position by dragging it to the navigator bar until we see a blue arrow.
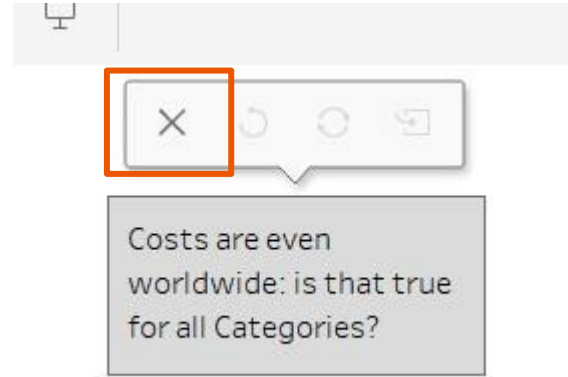
Create a new story

Add new Story Points

We can add new points to the story in several ways:

➔ <u>Blank button</u>: we can click the **Blank button** in the left-hand pane, then drag and drop the content that we want onto the canvas;

➔ <u>Double-click</u>: double clicking a piece of content from the Story pane brings it into the story;

➔ <u>Drag something to the Navigator bar</u>: bring a sheet out to a specific position by dragging it to the navigator bar until we see a blue arrow.

💡 Note that sheets that are already in use are marked with a blue tick in the Story pane

Create a new story

Deleting points

To remove points from the story or replace views with new
ones you can:

➜ Use the X icon on the Story point toolbar in the
Navigator bar;
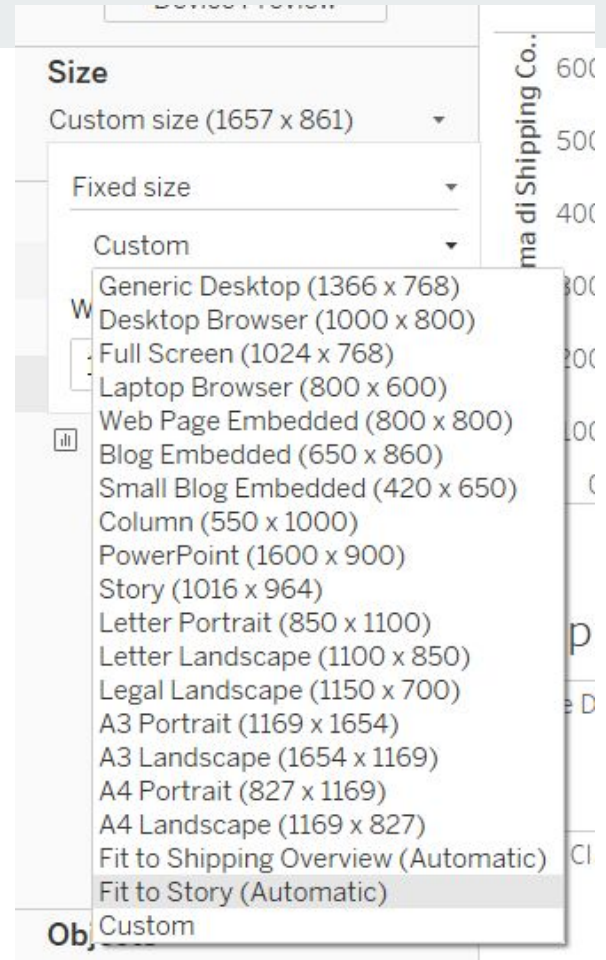➜ Drag and drop a new view onto the one already in the
story.

Costs are even
worldwide: is that true
for all Categories?

Create a new story

Fitting visualizations to the story

Dashboards can be added to stories in the same way as all other sheets. However, it is important to pay attention to the size of the dashboard once it is inserted into the story.

➔   Bring out the **Shipping Dashboard** as a new story point;
➔   Use the **Go to Sheet** button to go back to the original dashboard;
➔   In the Size pane, select **Fixed size** and **Fit to Story** to adapt the dashboard to the story's size.

You can do the same with any other sheet in the story.

Story Title

Add a caption

Running Total Shipping Costs

| Same Day | First Class | Second Class | Standard Class |

Legend:
- Critical
- High
- Medium
- Low

Ship Mode
(All)

Market
(All)

Shipping Cost

Med. Shipping Cost

- Same Day
- First Class
- Second Class
- Standard Class

Average Shipping Cost by Country

© 2022 Mapbox © OpenStreetMap
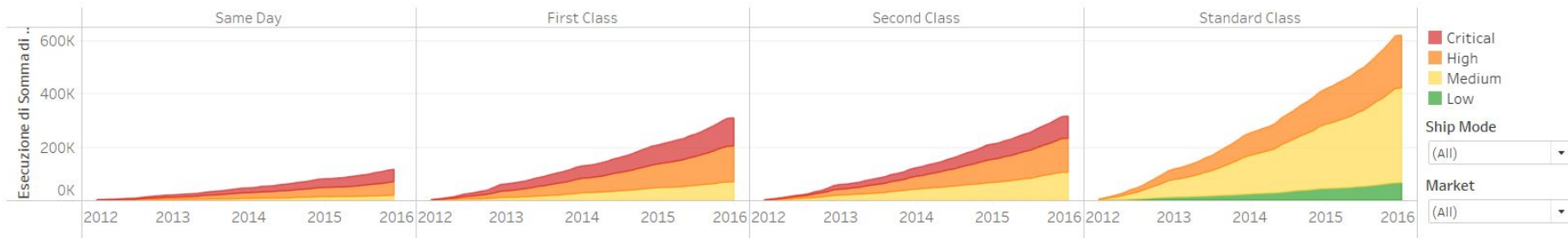
Create a new story

Updating underlying sheets

The changes that are made to the sheets are reflected in the stories and dashboards into which the sheets are imported. Let's try changing the legends and the selection of data to show to see how the story reacts!

➜ First, add the remaining sheets to the Story;

➜ After that, open the **Shipping Costs** sheet and hide the legend by opening the legend's menu and selecting **Hide Card**.
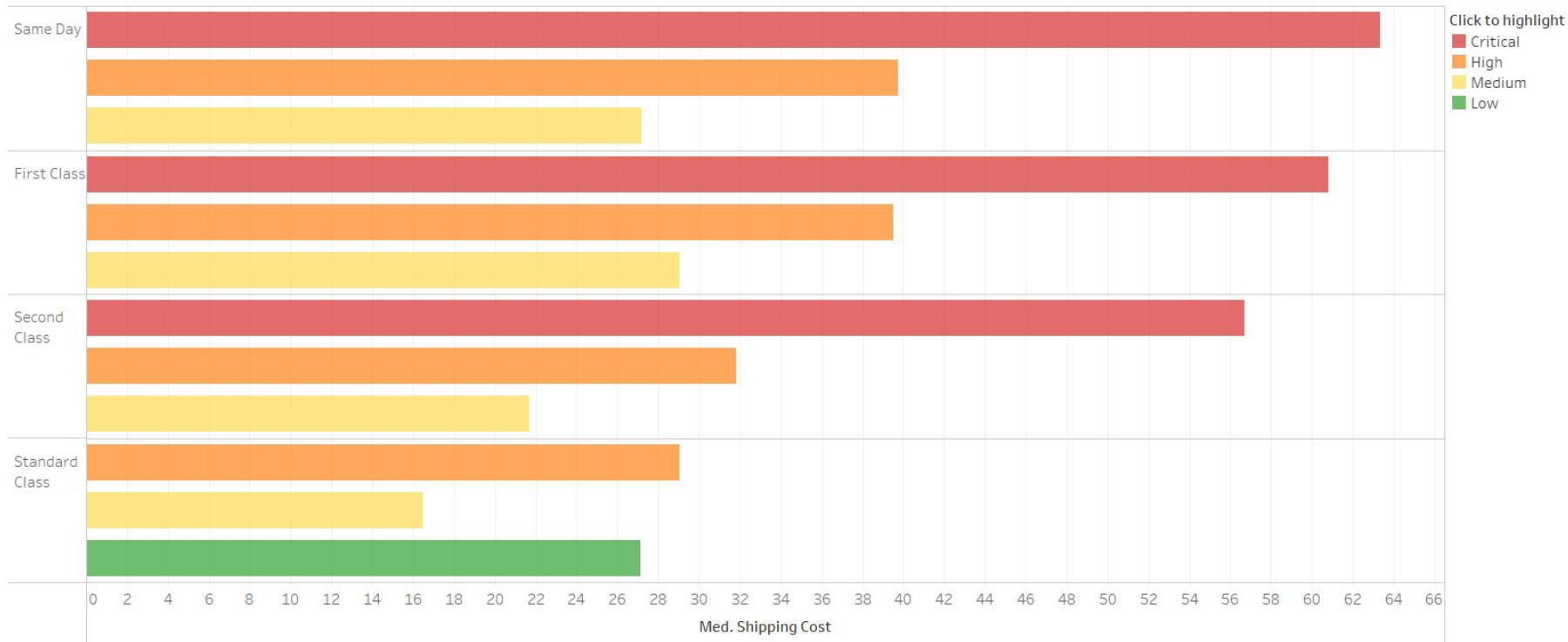
Story Title

Click to highlight
- Critical
- High
- Medium
- Low

Med. Shipping Cost
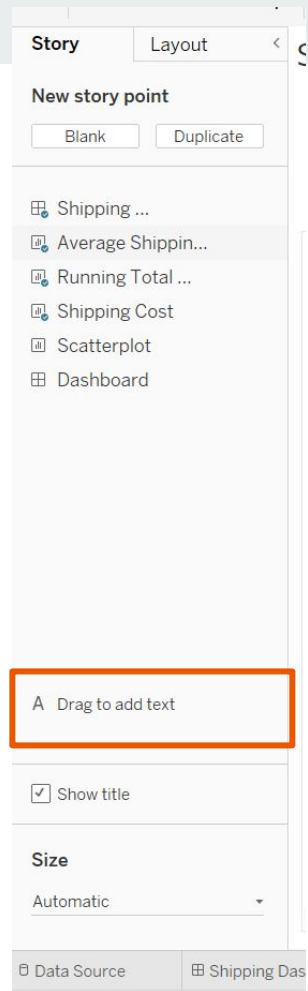
Story Title

Med. Shipping Cost

Create a new story

Annotating the story

How can we let our user know that they can interact with the chart?
How can we give them additional information about our analysis?

We simply add a **description** by dragging it out from the Story pane using the **Drag to add text** button.

This adds a fully editable text box to the story point.

Story Title

Story | Layout

New story point

Blank | Duplicate

Shipping ...
Average Shippin...
Running Total ...
Shipping Cost
Scatterplot
Dashboard

A Drag to add text

☑ Show title

Size

Automatic

Costs are even worldwide: is that true for all Categories?

Dashboard comparison

Add a caption

Add a caption

Category

● (All)
○ Furniture
○ Office Supplies
○ Technology

Avg. Shipping Cost

1,2   295,6
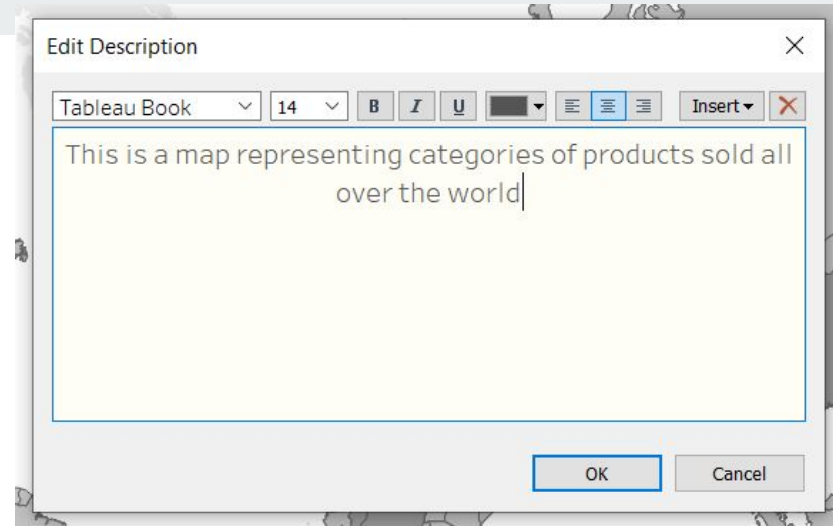
Create a new story

Annotating the story

How can we let our user know that they can interact with the chart?
How can we give them additional information about our analysis?

We simply add a **description** by dragging it out from the Story pane using the **Drag to add text** button.

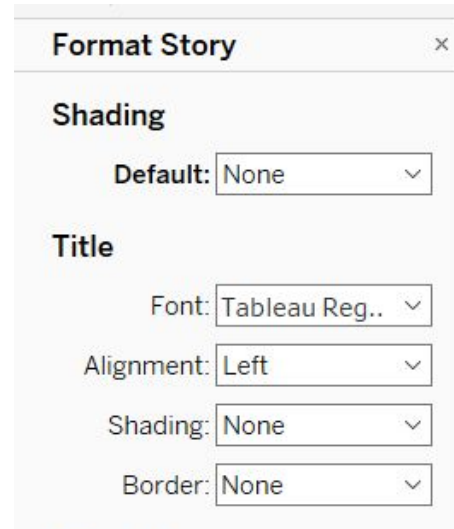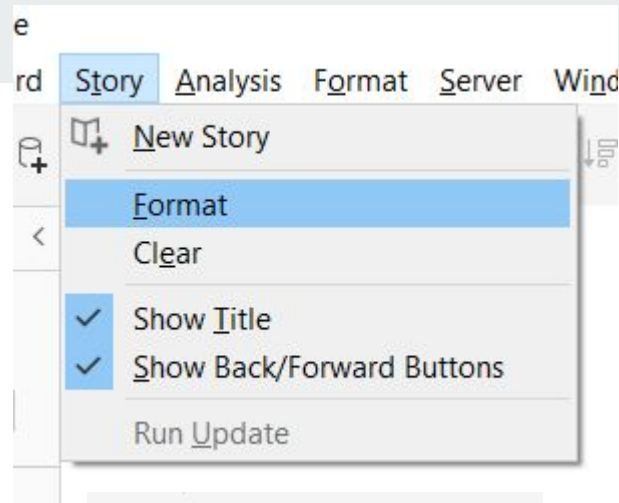This adds a fully editable text box to the story point.

Create a new story

Formatting the story

Finally, the whole aspect of the story is customizable.

To change fonts, colors, and text size, use the menu and select **Story** > **Format**. A panel will open in place of the Story pane that will allow you to customize the entire story.

5 minute break

Up next:

➔ 10 minutes to answer the Wooclap
➔ It's time to work on your projects

Play around with what we've seen today with different data sources (or start working on your projects)

Additional free data sources are available 🔗 here

Recap and lessons learned

Recap

➔ Stories:
   ◆ Create a new story;
   ◆ Adding/removing story points;
   ◆ Customizing story points;
   ◆ Updating charts inside stories..

Takeaway

Link to the solution workbook for the lesson: 🔗 TBD