

Data Literacy, Data Analysis, and Data Visualization Skills Matter a Great Deal for Today's Undergraduate and Graduate Students: **Let's explore a hands-on data visualization practice!**

Given that data are being created and stored on an unprecedented scale, a strong data analytical skillset would be a notable plus for career-oriented students in the “Era of Data Ubiquity” (quotes Mitchell Stevens). Having strong skills in data literacy, data analysis, and data visualization can help both undergraduate and graduate students (who will be tomorrow's business practitioners and business leaders) make informed decisions using data. These skills can give them the ability to make “data-based decisions.”

Tableau is a data visualization software tool that allows users to create interactive charts, graphs, and dashboards from their data. It is meant to help people understand and analyze their data more effectively. Tableau is used by many types of organizations to make better decisions using their data. It can be connected to various data sources (e.g., Microsoft Excel, Microsoft Access, PDF files, Statistical files) and enables users to easily create visualizations by dragging and dropping elements. The insights generated by Tableau can be shared with others. Please **watch a 2:19 minute Tableau Introduction video** if you have little idea about the power of Tableau: https://www.tableau.com/why-tableau/what-is-tableau?creative=&cq_cmp=1695532942&cq_net=g&cq_plac=#video

Who can benefit from data literacy training? According to a Tableau blog, anyone can benefit from data literacy training, especially (1) business professionals, (2) organizations, (3) informed citizens, and (4) students. Feel free to check the details on a 2022 blog by Sue Kraemer (<https://tabsoft.co/3imKLY>).

The screenshot shows a web browser with the URL tableau.com/blog/build-your-data-skills-data-literacy-trail-trailhead. The page title is "Build Your Data Skills with the Data Literacy Trail on Trailhead". The header includes navigation links for "Why Tableau", "Products", "Solutions", "Resources", and "Partners". A "BUY NOW" button is visible on the right. The main content area features a bio for Sue Kraemer, Senior Data Skills Curriculum Strategy Manager at Tableau, and a quote from her. There are also social sharing icons for LinkedIn, Twitter, and Facebook.

Build Your Data Skills with the Data Literacy Trail on Trailhead

Get the data skills you need to ask the right questions, make better decisions, and grow your career with this free training, available in 8 languages.



Sue Kraemer
Senior Data Skills Curriculum Strategy Manager, Tableau
August 4, 2022

SHARE:



The future speaks data—do you? Despite data skills being the most in-demand skill in today's (and tomorrow's) job market, there's still a data literacy gap.

Get the training you need to ask the right questions, make better decisions, and grow your career. Start building your data skills—for free—with the [Build Your Data Literacy Trail on Trailhead](#). In support of our ongoing mission to help people everywhere see and understand data, the Trail is now available in [Japanese](#), [German](#), [French](#), [Spanish](#) (Mexico), [Portuguese](#) (Brazil), [Simplified Chinese](#), and [Korean](#).

In this hands-on data visualization practice, let's **use Tableau to visualize the moving relationship between income and life expectancy across over 150 nations in the past two hundred years** (from year 1800 up to year 2023).

1. We will download four relevant datasets from **data.world** (<https://data.world/missdataviz-wow2021-w11>). Pls click the underlined link to find the data sets online, and then save the files in your hard drive.

The screenshot shows the data.world website with the URL <https://data.world/missdataviz-wow2021-w11> highlighted in a yellow box. The page title is "WOW2021 W11". On the left, there's an "Overview" section with a "DESCRIPTION" field containing "Gap Minder Data" and a "SUMMARY" field stating "No summary added". In the center, there's a message box with the text: "If you do not have a [data.world](#) account, you need to complete a free online registration first. Otherwise, ask your instructor for his/her guidance." To the right, there's an "About this dataset" section with details like "SHARED WITH Everyone", "CREATED 2 years ago by @missdataviz", "SIZE 958.43 KB · Download", and "DICTIONARY 4 files, 859 columns, 0 tables · View". Below that is a "Recent updates" section showing two entries from "@missdataviz". At the bottom, there's a list of "4 files" with one item visible: "Data Geographies - v1 - by Gapminder.xlsx".

2. Please visit Tableau's official website and then download a 14-day free trial version of the **Tableau Desktop** (<https://www.tableau.com/products/desktop/download>).

The screenshot shows the Tableau website with the URL <https://www.tableau.com/products/desktop/download> highlighted in a yellow box. The page title is "Tableau Desktop: Start your free 14-day trial". It features a "TRY NOW" button and a form for entering personal information: First Name, Last Name, Business E-mail, Organization, and Company Size.

3. We will enable **Tableau Desktop** and then “connect” the datasets to the Tableau canvas [FYI, under **Connect**, select the relevant file types (e.g., a Microsoft Excel file or a .csv text file). In the **Open** dialog box, navigate to and select a file. Select **Open...**]

I am using a trial version of the **Tableau Desktop** in this demo. Notably, I also created a heat map demo using a FREE **Tableau Public**, and I will be happy to share that demo upon request via my LinkedIn profile.

LinkedIn (<https://www.linkedin.com/in/maxwell-hsu-47b3039/>)

Google Scholar
<https://scholar.google.com/citations?user=fpEuLRkAAAAJ&hl=en>

Let's start with the income per person data set. As the "income_per_person_gdppercapita_ppp_inflation_adjusted" is a .CSV file, we need connect this file by clicking "Text File" option. By default, the "Use Data Interpreter" option is not enabled. When we find that the first row (i.e., **country, 1800**) corresponds to the variable names, we will check mark the "Use Data Interpreter" box to fix this issue (see Step #4).

FYI: The **Undo** button is here!

income_per_person_gdppercapita_ppp_inflation_ad...

Connection: Live | Extract

Filters: 0 | Add

Files

Use Data Interpreter
Data Interpreter might be able to clean your Text file workbook.

income_per_person_gdppercapita_ppp_inflation_adjusted.csv

income_per_person_gdppercapita_ppp_inflation_adjusted.csv

life_expectancy_years.csv

population_total.csv

New Union

New Table Extension

income_per_person_gdppercapita_ppp_inflation_adjusted.csv

242 fields 194 rows

Name: income_per_person_gdppercapita_ppp_inflation_adjusted.csv

Fields

Type	Field Name	Physical Table	Rem...
Abc	F1	income_per_person_gdppercapita_ppp_inflation_adjusted.csv	F1
#	F2	income_per_person_gdppercapita_ppp_inflation_adjusted.csv	F2

Sheet 1

Rows: 100

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

"country" should be a variable name! See Step #4.

	income_per_person_gdppercapita_ppp_inflation_adjusted.csv	income_per_person_gdppercapita_ppp_inflation_adjusted.csv	income_per_person_gdppercapita_ppp_inflation_adjusted.csv
country	1800	1800	1800
Afghanistan	603	603	603
Albania	667	667	667
Algeria	715	715	715
Andorra	1,200	1,200	1,200

4. Let's check mark the "Cleaned with Data Interpreter" box (see the circled red rectangle box and the red circle).

The screenshot shows the Tableau Data Source interface. In the top-left corner, under 'Connections', there is a list with one item: 'income_per_person_gdppercapita_ppp_inflation_adjusted'. Below this, in the 'Files' section, there is a checkbox labeled 'Cleaned with Data Interpreter' which is checked. A red circle highlights this checkbox. To the right of the files, there is a preview area showing a small grid icon and the text 'Need more data? Drag tables here to relate them. Learn more'. At the bottom of the interface, there is a table preview titled 'income_per_person_gdpp...' with 242 fields and 193 rows. The first few rows of data are visible, including columns for 'country' and '1800'. A red box highlights the 'country' column header.

5. We will re-organize the data structure using the Pivot function (i.e., Pivot the income data).

The screenshot shows the same Tableau Data Source interface as the previous one. The 'Cleaned with Data Interpreter' checkbox is still checked. A large red box highlights the entire data preview area. A tooltip appears over the data preview, containing the following text: 'Hold both "Shift" and "Ctrl" keys to highlight all variables (all columns) but the **country** variable. In the highlighted area, click the drop-down arrow next to the column name to find this dropdown menu (see P. 5 for details).'. To the right of the preview, a context menu is open, showing options like 'Rename', 'Copy Values', 'Hide', 'Create Calculated Field...', and 'Pivot'. A red circle highlights the 'Pivot' option in the menu.

Hint: if you are not familiar with the power of the Pivot function, please check relevant information on this Tableau webpage: https://help.tableau.com/current/prep/en-us/prep_pivot.htm or this Microsoft webpage: <https://bit.ly/3vMzVkd>

help.tableau.com/current/pro/desktop/en-us/pivot.htm

← → C 🔒 help.tableau.com/current/pro/desktop/en-us/pivot.htm

+ a b | e a u

← Tableau Help > Tableau

As the Tableau site reveals, once we select multiple columns, we will “click the drop-down arrow next to the column name, and then select **Pivot**. New columns called Pivot field names and Pivot field values are created and added to the data source.”

CONTENTS

- Tableau Desktop and Web Authoring Help
- What's New in Tableau
- Get Started
- Connect to and Prepare Data
 - Connect to Your Data
 - Set Up Data Sources
 - Plan the Data Source
 - Relate Your Data
 - Join Your Data
- If you encounter any challenges when you attempt to select multiple columns in Tableau, please consider Google searching the answers on your own or consulting your data analytics or marketing instructors.

After you have set up the data source, in the grid, select two or more columns. Click the drop-down arrow next to the column name, and then select **Pivot**. New columns called "Pivot field names" and "Pivot field values" are created and added to the data source. The new columns replace the original columns that you selected to create the pivot.

6. Double click "Pivot Field Name" and change it to **Year**. Change "Pivot Field Values" to **Income**. FYI, we should also click the data type icon and change variable **Year**'s data type from ABC (string) to Number (whole) here, but I failed to do so in Step #6 → Check Step #24 to see the consequence & how to fix it.

Tableau - Book1

File Data Server Window Help

Connections Add

income_per_person_gdppercapita_ppp_inflation_adjusted

Cleaned with Data Interpreter
Review the results. (To undo changes, clear the check box.)

income_per_person_gdppercapita_ppp_inflation_adjusted.csv
life_expectancy_years.csv
population_total.csv

New Union
New Table Extension

income_per_person_gdpp...

income_per_person_gdpp...

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

income_per_person_gdpp... 3 fields 46513 rows

100 rows

Name: income_per_person_gdppercapita_ppp_inflation_adjusted.csv

Type	Field Name	Physical Table	Format	Value
country	income_per_person_gdppercapita_ppp_inflation_adjusted.csv	income_per_person_gdppercapita_ppp_inflation_adjusted.csv	Number (decimal)	1804
Year	Pivot.	Pivot	Number (whole)	1805
Income	Pivot.	Pivot	Date & Time	1806

Change the newly created Pivot Field Names to **Year** and **Income**.

Data Source Sheet 1

7. We will connect the second data set (i.e., population total) to the Tableau canvas with the Drag and Drop trick.

Tableau - Book1

File Data Server Window Help

Connections Add

income_per_person... Text file

Files

- Cleaned with Data Interpreter
- [Review the results](#). (To undo changes, clear the check box.)
- income_per_person_gdppercv.csv
- life_expectancy_years.csv
- population_total.csv**
- New Union
- New Table Extension

income_p... — populatio... ▾

How do relationships differ from joins? [Learn more](#)

population_total.csv	# population_total.csv	# population_total.csv	# population_total.csv
Country (Population Tot...	1800	1801	1802
Afghanistan	3,280,000	3,280,000	3,280,000
Albania	400,000	402,000	404,000
Algeria	2,500,000	2,510,000	2,520,000
Andorra	2,650	2,650	2,650
Angola	1,570,000	1,570,000	1,570,000
Antigua and Barbuda	37,000	37,000	37,000

8. Please highlight all variables but the **country** variable. Likewise, we will re-organize the data structure using the Pivot table function. Change the variables names to "**Year 1**" and "**Population**" (like Step #6). Also, please change **Year 1**'s data type from ABC (a string) to Number(Whole).

Tableau - Book1

File Data Server Window Help

Connections Add

income_per_person... Text file

Files

- Cleaned with Data Interpreter
- [Review the results](#). (To undo changes, clear the check box.)
- income_per_person_gdppercv.csv
- life_expectancy_years.csv
- population_total.csv
- New Union
- New Table Extension

income_p... — populatio... ▾

How do relationships differ from joins? [Learn more](#)

population_total.csv	# population_total.csv	# population_total.csv	# population_total.csv
Country (Population Tot...	16	2097	2098
Afghanistan	75,800,000	75,600,000	75,400,000
Albania	1,190,000	1,170,000	1,140,000
Algeria	70,700,000	70,700,000	70,700,000
Andorra	62,700	62,600	62,500
Angola	179,000,000	103,000	57,200,000

Rename
Copy Values
Hide
Pivot
Create Calculated Field...
Merge Mismatched Fields

In the highlighted area, click the arrow to find this dropdown menu.

Hint: Do NOT highlight the **country** variable when we attempt to generate a Pivot variable ... Also, please change the newly created variable name to **Year 1** (or any variable name but "**Year**" because this variable name has been used and the **Year** variable could be found in the income per person data file).

9. We will recognize the relationship between variable **Year** (in the income per person data set) and variable **Year 1** (in the population data set). Remember to edit variable **Year 1**'s data type (to Number).

The screenshot shows the Tableau interface with two data sources joined:

- income_per_person_gdppercapita_ppp_inflation_adjusted** (Text file)
- population_total.csv**

A join is established between the **Year** field in the first source and the **Year 1** field in the second source.

In the context menu for the **Year 1** field, the **Number (decimal)** and **Number (whole)** options are highlighted with a red box. The **Default** option is also circled in red.

Field	Type	Value
Year	Date & Time	3.28C
Year 1	String	3.28C
Year 1	Spatial	3.28C
Year 1	Boolean	3.28C
Year 1	Default	3.28C
Year 1	Geographic Role	3.28C
Year 1	Image Role	3.28C
Year 1	Population	3.28C

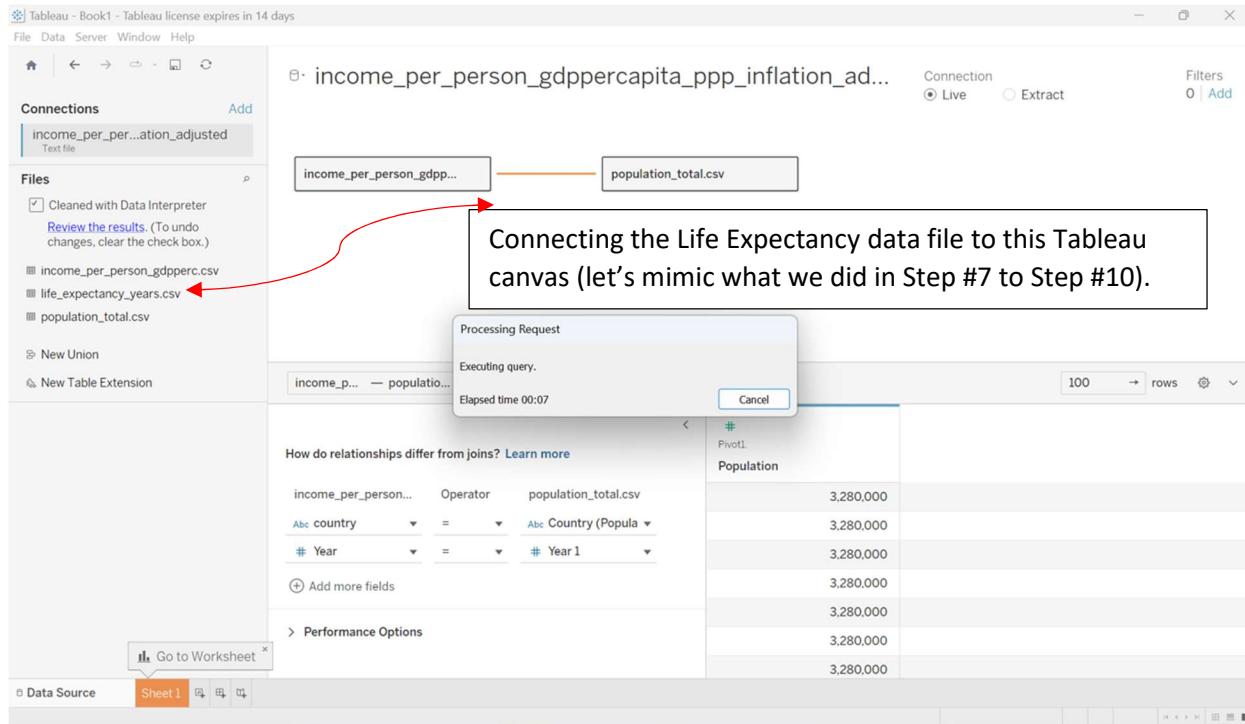
10. We will hide all variables but the **Population** variable (Hint: it's okay if you skip the hiding step, as not hiding other variables won't cause any issues when we create a bubble chart).

The screenshot shows the same joined data sources as the previous step. A context menu is open over the **Year 1** field in the population data source. The **Hide** option is highlighted with a red box.

The data table shows the following values:

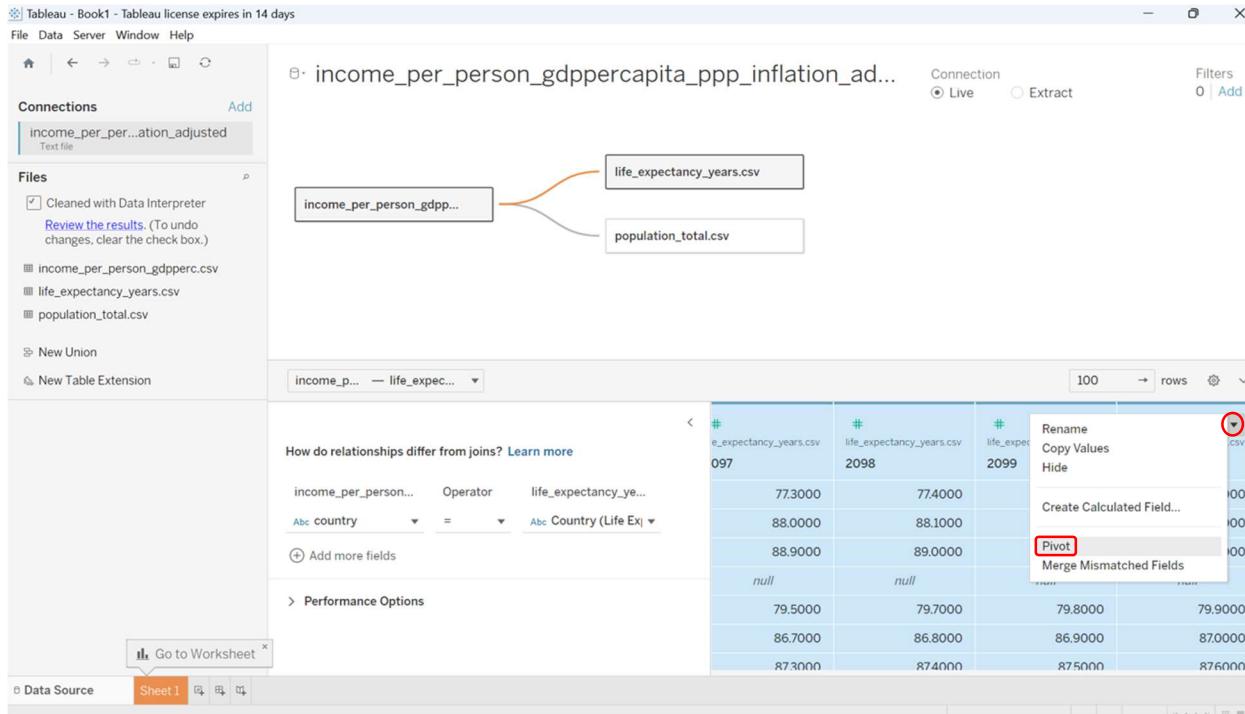
Year 1	Population
1800	3,280,000
1801	3,280,000
1802	3,280,000
1803	3,280,000
1804	3,280,000
1805	3,280,000
1806	3,280,000

11. Now, we will connect the third data set (i.e., life expectancy) to this Tableau project.



The screenshot shows the Tableau Data Source interface. In the 'Connections' pane, there is one connection named 'income_per_person_gdppercapita_ppp_inflation_adjusted'. The 'Files' pane contains four files: 'income_per_person_gdppercapita_ppp_inflation_adjusted' (selected), 'income_per_person_gdppercapita_ppp_inflation_adjusted', 'life_expectancy_years.csv', and 'population_total.csv'. A red arrow points from 'life_expectancy_years.csv' to the relationship line between the first two files. A callout box with a black border and white text says: 'Connecting the Life Expectancy data file to this Tableau canvas (let's mimic what we did in Step #7 to Step #10)'. Below the connections, a 'Processing Request' dialog is open, showing 'Executing query.' and 'Elapsed time 00:07'. The main pane displays a table with columns '#', 'Pivot1.', and 'Population', all showing the value 3,280,000. At the bottom, there is a 'Go to Worksheet' button.

12. Similarly, we will Pivot the data.



The screenshot shows the Tableau Data Source interface. In the 'Connections' pane, there is one connection named 'income_per_person_gdppercapita_ppp_inflation_adjusted'. The 'Files' pane contains four files: 'income_per_person_gdppercapita_ppp_inflation_adjusted' (selected), 'income_per_person_gdppercapita_ppp_inflation_adjusted', 'life_expectancy_years.csv', and 'population_total.csv'. A red arrow points from 'life_expectancy_years.csv' to the relationship line between the first two files. A context menu is open over the data table, with 'Pivot' highlighted. The main pane displays a table with columns '#', 'life_expectancy_years.csv', 'life_expectancy_years.csv', and 'life_expectancy_years.csv'. The data shows values for years 097, 2098, and 2099. The 'Pivot' option in the context menu is circled in red. At the bottom, there is a 'Go to Worksheet' button.

Hint: Leave the **country** variable intact (i.e., the **country** variable should not be included in the Pivoting task). As a reminder, hold both the **Ctrl** and **Shift** keys when you attempt to highlight multiple columns.

13. Change/update the Pivot variable names.

The screenshot shows the Tableau Data Source interface. On the left, under 'Connections', there is a single connection to 'income_per_person_gdppercapita_ppp_inflation_adjusted'. Under 'Files', several CSV files are listed: 'income_per_person_gdppercapita_ppp_inflation_adjusted' (selected), 'life_expectancy_years.csv', and 'population_total.csv'. In the center, a relationship diagram shows 'income_per_person_gdpp...' connected to both 'life_expectancy_years.csv' and 'population_total.csv'. On the right, a preview pane displays data from 'life_expectancy_years.csv' for Afghanistan, with columns 'Year 2' and 'Life Expectancy'. A red arrow points from the 'Pivot2' column header to the 'Life Expectancy' field, highlighting the need for renaming.

14. It's about time to instruct Tableau to recognize the additional relationships between the data sets.

The screenshot shows the Tableau Data Source interface with a red box highlighting the 'Relationship Calculation...' dropdown menu in the relationship editor. The relationship editor is open between 'income_per_person_gdppercapita_ppp_inflation_adjusted' and 'life_expectancy_years.csv'. It shows two existing relationships: one between 'Abc country' and 'Country (Life Expectancy Years.Csv)', and another between '# Year' and 'Year 2'. A third relationship is being defined, with 'Select a field' currently selected. The preview pane on the right shows data for Afghanistan from 1800 to 1806, with columns 'Year 2' and 'Life Expectancy'.

15. After we hide variables **country** and **Year 2**, the only “visible” variable in the life expectancy data set will be “Life Expectancy”. Check the red box between Step #14 and Step #15 (a relationship between **Year** in the income data set and **Year 2** in the life expectancy data set has been established).

The screenshot shows the Tableau Data Source interface. On the left, there's a list of files: 'income_per_person_gdppercapita_ppp_inflation_adjusted' (selected), 'life_expectancy_years.csv', and 'population_total.csv'. In the center, a diagram shows three boxes: 'income_per_person_gdppercapita_ppp_inflation_adjusted' (with a red box around 'Year'), 'life_expectancy_years.csv', and 'population_total.csv'. Arrows connect 'Year' to 'Year 2'. On the right, a PivotTable view shows 'Life Expectancy' values from 28.0000 to 28.1000. A callout box on the right says: "We will hide two variables (see Step #10): **country & Year 2**".

16. We will connect the last data set (i.e., the Geographies) to the current Tableau project. Since this data file is an Excel type, click "Microsoft Excel" and Open "Data Geographies-v1-by Gapminder". Notably, I use Microsoft Windows 11's File Explorer function to reveal all four data sets' filenames.

The screenshot shows the Tableau Data Source interface with the 'Add a Connection' dialog box open. The 'Add' button in the top right of the dialog is highlighted with a red box. A callout box on the right says: "Adding the Geographies data to the Tableau database". The dialog shows a file browser window with 'Data Geographies - v1 - by Gapminder' selected. The main interface shows a list of files: 'income_per_person_gdppercapita_ppp_inflation_adjusted', 'life_expectancy_years.csv', and 'population_total.csv'.

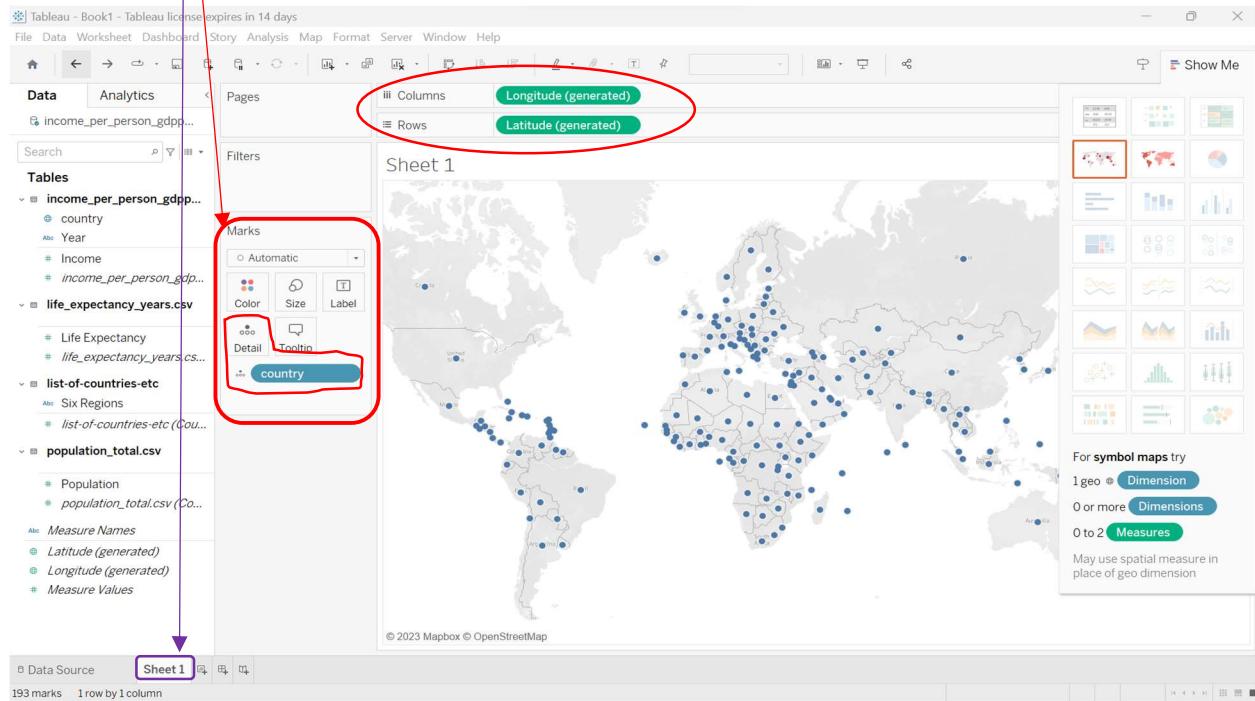
17. Now, let's connect the "list-of-countries-etc" sheet to the income per person data set shown on the Tableau canvas. Establish the relationship between two data sets (i.e., income & list of countries), and the exclamation mark (see the purple circle) will disappear. Note that we need to connect Income data set's **country** variable with list-of-countries-etc data set's **Name** variable.

The screenshot shows the Tableau Data Source interface. On the left, under 'Connections', there is a connection to 'income_per_person_gdpperc.csv'. Under 'Sheets', the 'list-of-countries-etc' sheet is selected. In the center, a 'Drag and Drop' area shows a relationship being established between 'income_per_person_gdpperc.csv' and 'list-of-countries-etc'. A purple circle highlights the path from the first sheet to the second. A red box highlights the 'Name' field in the dropdown menu for the relationship calculation. On the right, a preview of the 'list-of-countries-etc' sheet shows various regions like 'Eight Regions', 'Four Regions', 'Geo', 'Members Oecd G77', and 'Name'. A red box highlights the 'Name' field in this list. A tooltip says 'Select matching fields to create this relationship.' at the bottom of the relationship dialog.

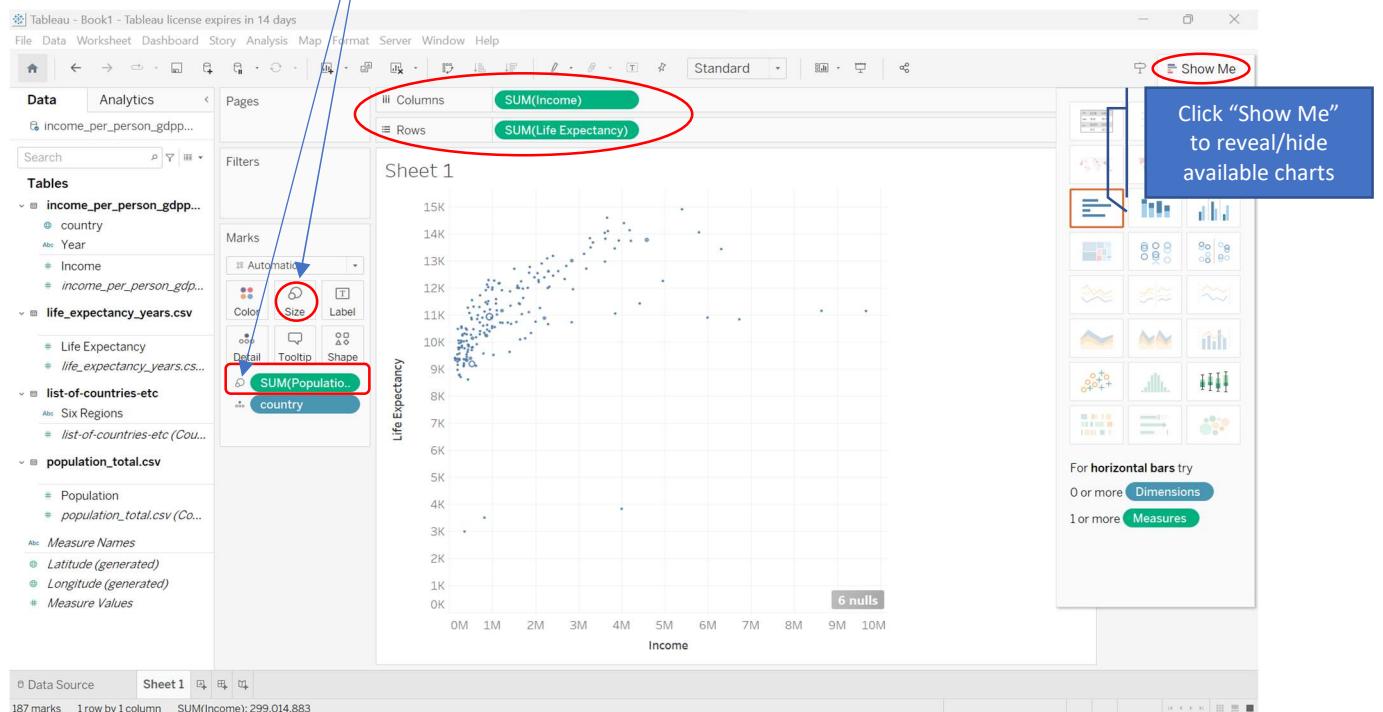
18. Again, we will hide all variables but the "**Six Regions**" variable in the list of countries data set.

The screenshot shows the Tableau Data Source interface. On the left, under 'Connections', there is a connection to 'income_per_person_gdpperc.csv'. Under 'Sheets', the 'list-of-countries-etc' sheet is selected. A checkbox labeled 'Cleaned with Data Interpreter' is checked. In the center, the 'list-of-countries-etc' sheet is previewed, showing 197 rows. The 'Fields' section displays a table with one row, 'Six Regions', which is highlighted with a red box. The rest of the fields listed are 'south_asia', 'europe_central_asia', 'middle_east_north_africa', 'europe_central_asia', 'sub_saharan_africa', 'america', and 'america'. A tooltip says 'Review the results. (To undo changes, clear the check box.)' at the top of the preview area.

19. We are now ready to build a “static” bubble chart. Specifically, please click “Sheet1” at the bottom. After clicking “**Sheet 1**” (on the bottom of the Tableau window), we will need to drag the **country** variable to the **Marks** card (i.e., the Detail).



20. Let's remove the Longitude and Latitude information from the chart. Next, let's associate the **income** variable with the X-axis (i.e., columns) and associate the **life expectancy** variable with the Y-axis (i.e., rows). Notably, the darkness of the dot's color corresponds to each country's population.



21. We will drag the **Year** variable to the “Pages” box (as a dimension). In addition, we will drag the same **Year** variable to the “Filter” box and then exclude the missing data (i.e., Null) from the data visualization task. More details about Tableau’s filtering function could be found online (see p. 14).

A “null” value is a field that is blank, and signifies missing or unknown values. We will instruct Tableau to “exclude” the Null values from the chart.

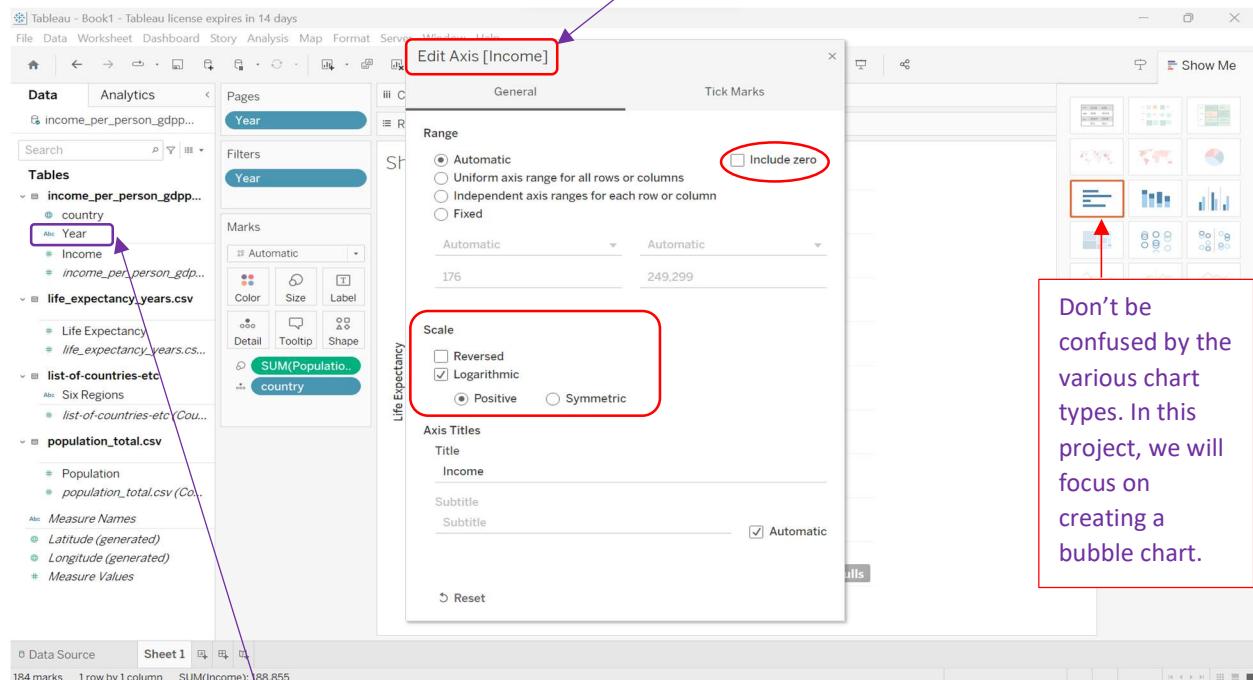
help.tableau.com/current/pro/desktop/en-us/filtering.htm

Filter Data from Your Views

Filtering is an essential part of analyzing data. This article describes the many ways you can filter data from your view. It also describes how you can display interactive filters in the view, and format filters in the view.

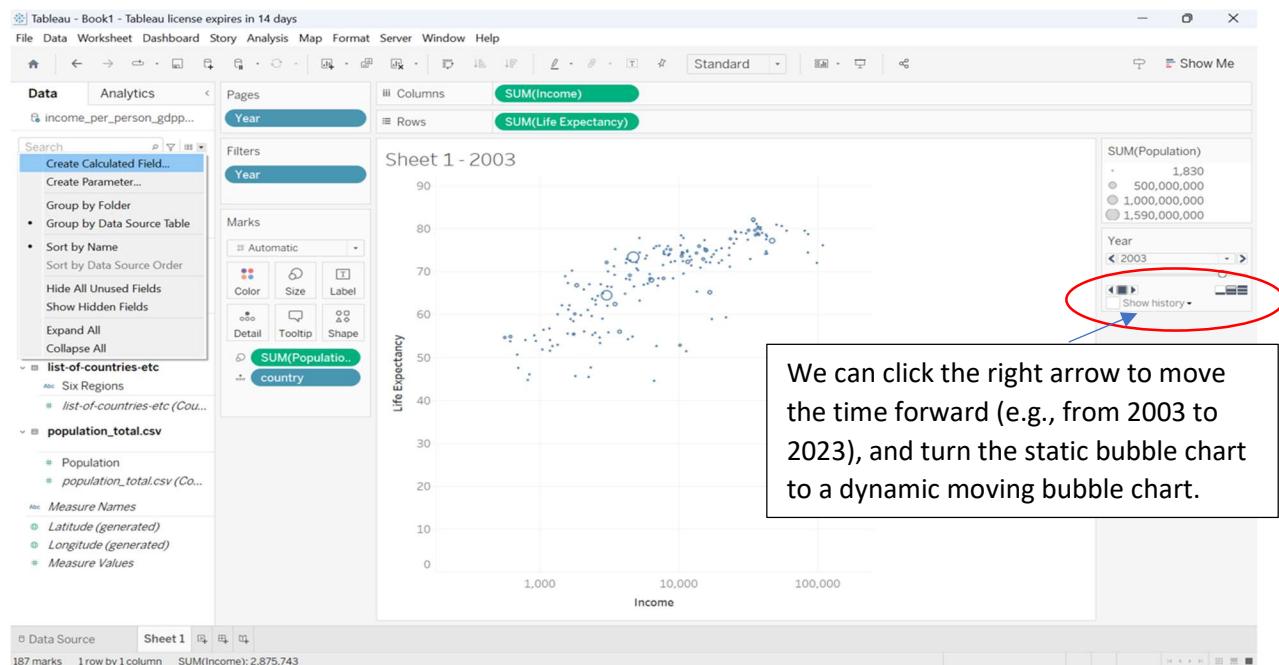
Watch a Video: To see related concepts demonstrated in Tableau, watch these free training videos: [Ways to Filter](#) (2 minutes), [Where Tableau Filters](#) (4 minutes), [Using the Filter Shelf](#) (7 minutes), [Interactive Filters](#) (4 minutes), and [Additional filtering topics](#) (7 minutes). Use your [tableau.com](#) account to sign in.

22. We will modify the scale. The way to show the "Edit Axis [income]" is to double click **income** at the bottom of the chart. Once we are in the Edit Axis [Income] pop-up window, check mark "Logarithmic" and uncheck "Include zero."

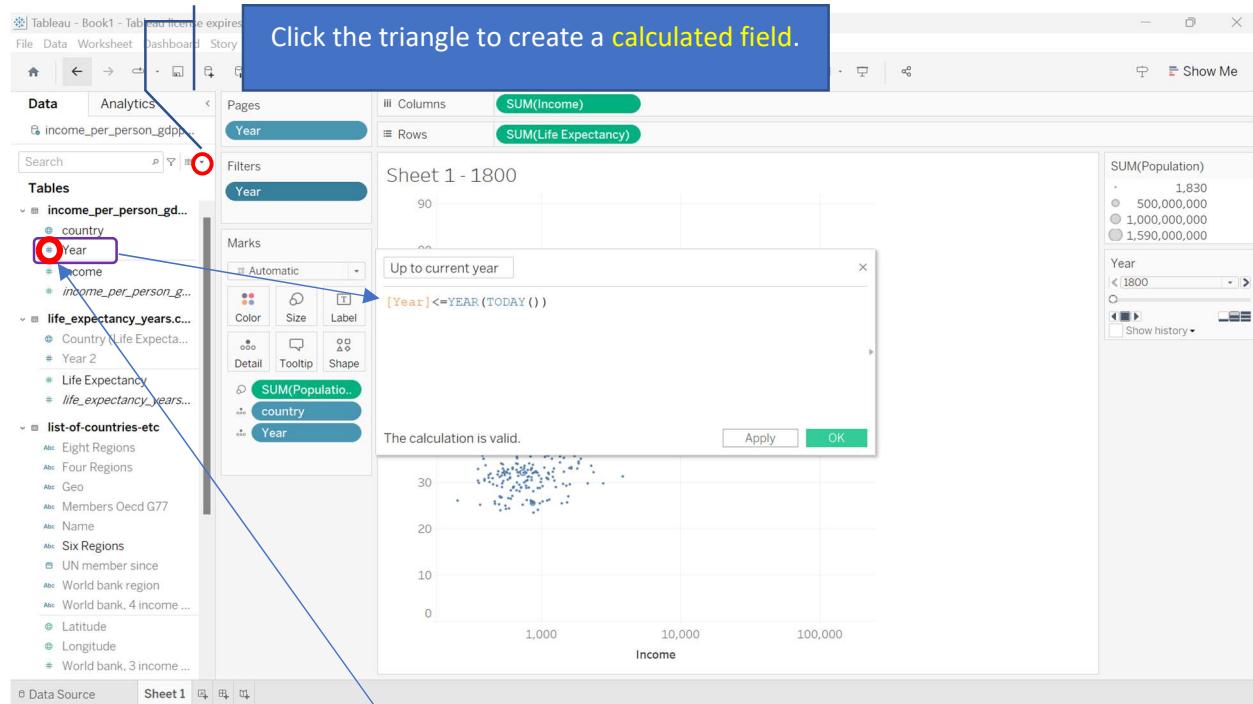


Hint: The variable "**year**" could be an issue (as it appears the data type is ABC, or a string)... and we will deal with this issue in the next step (i.e., Step #23).

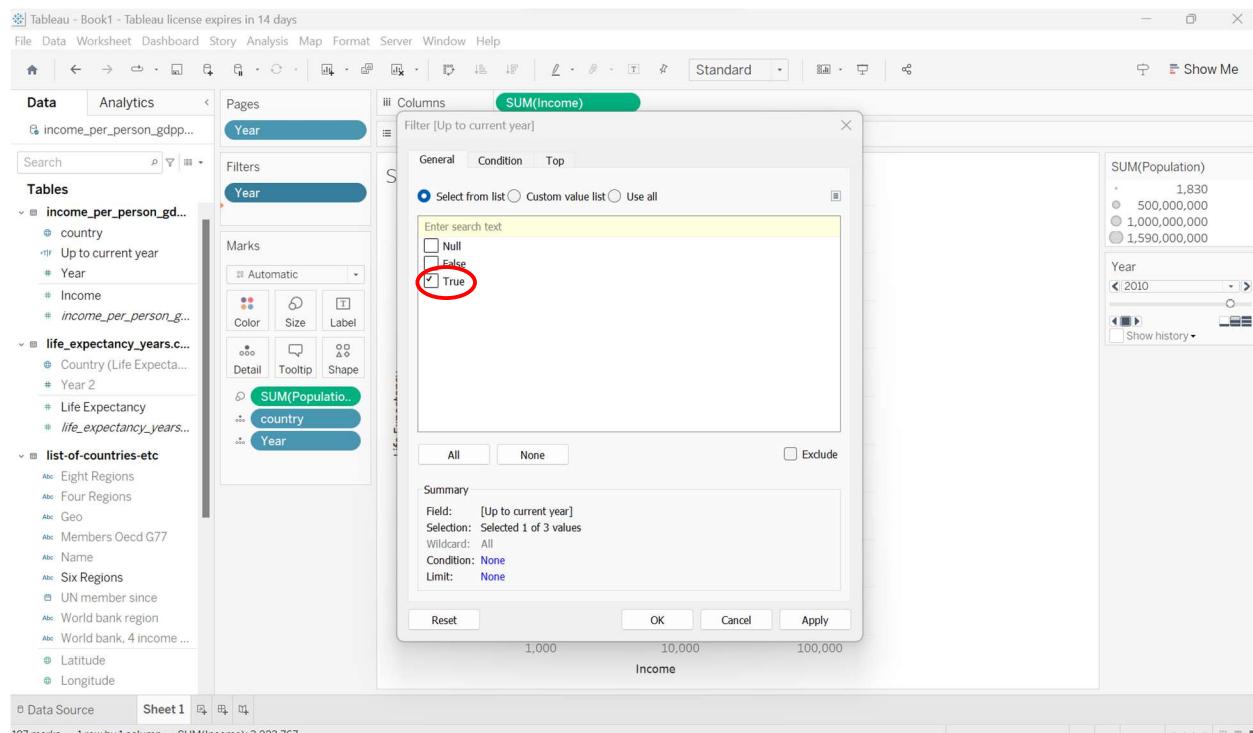
23. The data sets include income and life expectancy information all the way to year 2040.



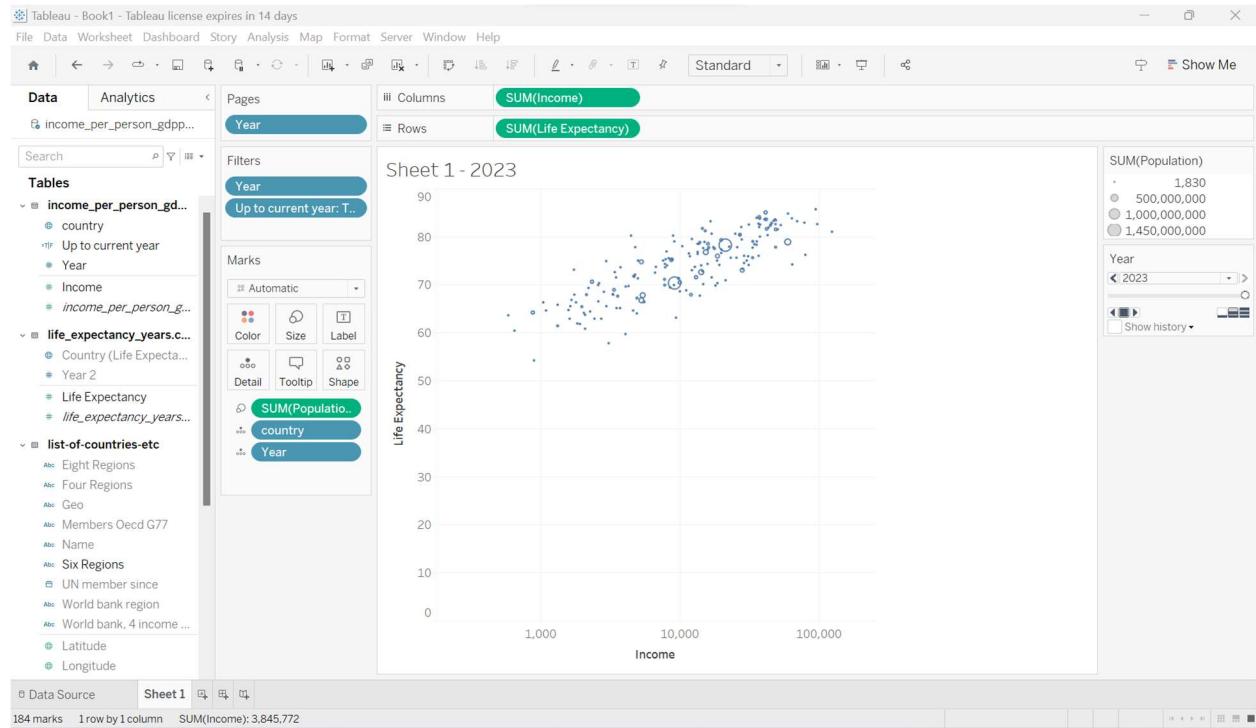
24. We will create a functional filter to reveal the moving bubble charts to the current year (i.e., 2023). Specifically, we will create a calculated field to set the time ceiling to be the current year (e.g., 2023). FYI, the to-be-typed formula in the calculated field box is [Year] <= YEAR(TODAY())



Hint: Check the variable **Year**'s data type. If we do not update variable **Year**'s data type (from ABC to Whole #), we won't be able to adequately create a "calculated field." Thus, we should double click the **Year** variable and then change its data type from ABC (string) to Number (whole).



25. The current year shown on this revised bubble chart is year 2023.



26. We will bring the “region” information to the chart. FYI, check the Appendix (p. 20) for Tableau’s Replacement function; the **to-be-typed** formula is **UPPER(REPLACE([Six Regions], ‘_’, ‘’))** → Please do NOT copy and paste the formula ... otherwise, you might encounter errors.

Click the triangle to call out a calculated field again.

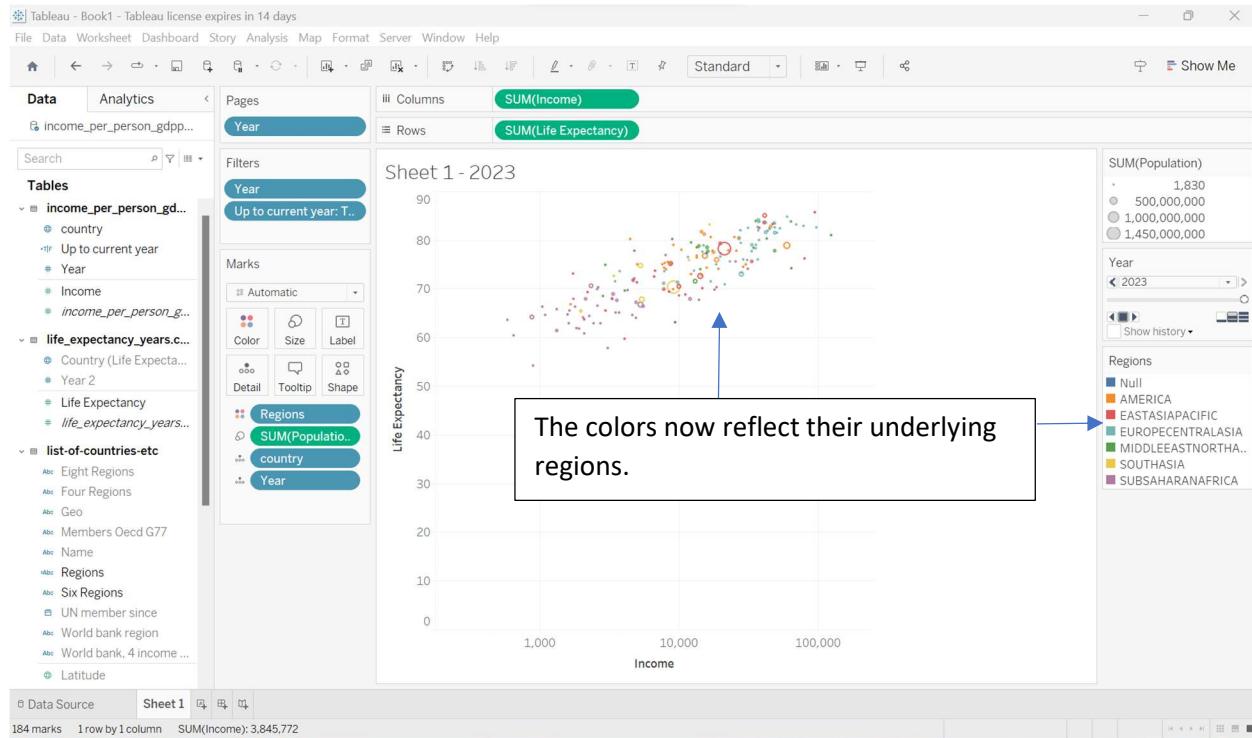
upper(Replace(([Six Regions], ‘_’, ‘’))

The calculation is valid.

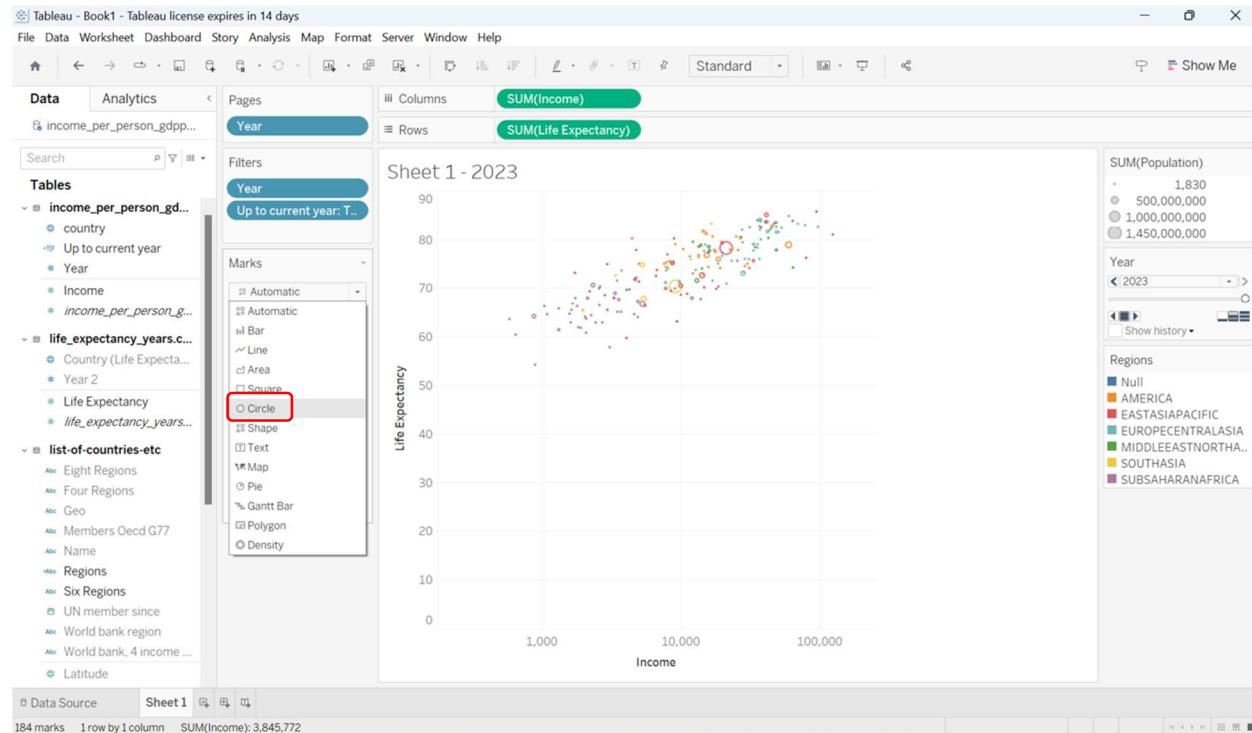
Asiyah Fox (Customer) asked a question.
January 12, 2022 at 7:53 PM

Trouble with basic copy/pasting on Tableau Desktop for Mac.

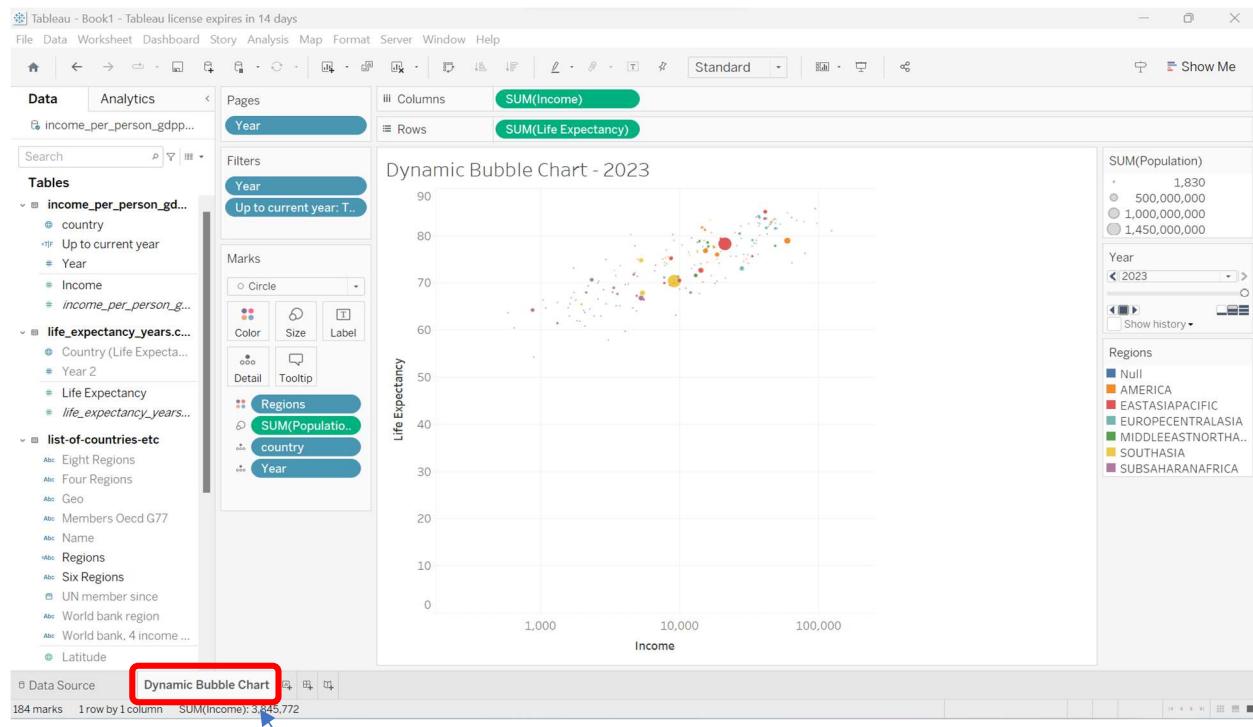
I've worked with Tableau for years at other companies, and I've never experienced this issue previously. However, over the last few years at my current company where we use Macs, several coworkers and I experience an issue when copy/pasting on Tableau Desktop.



27. We will replace the dots with circles.

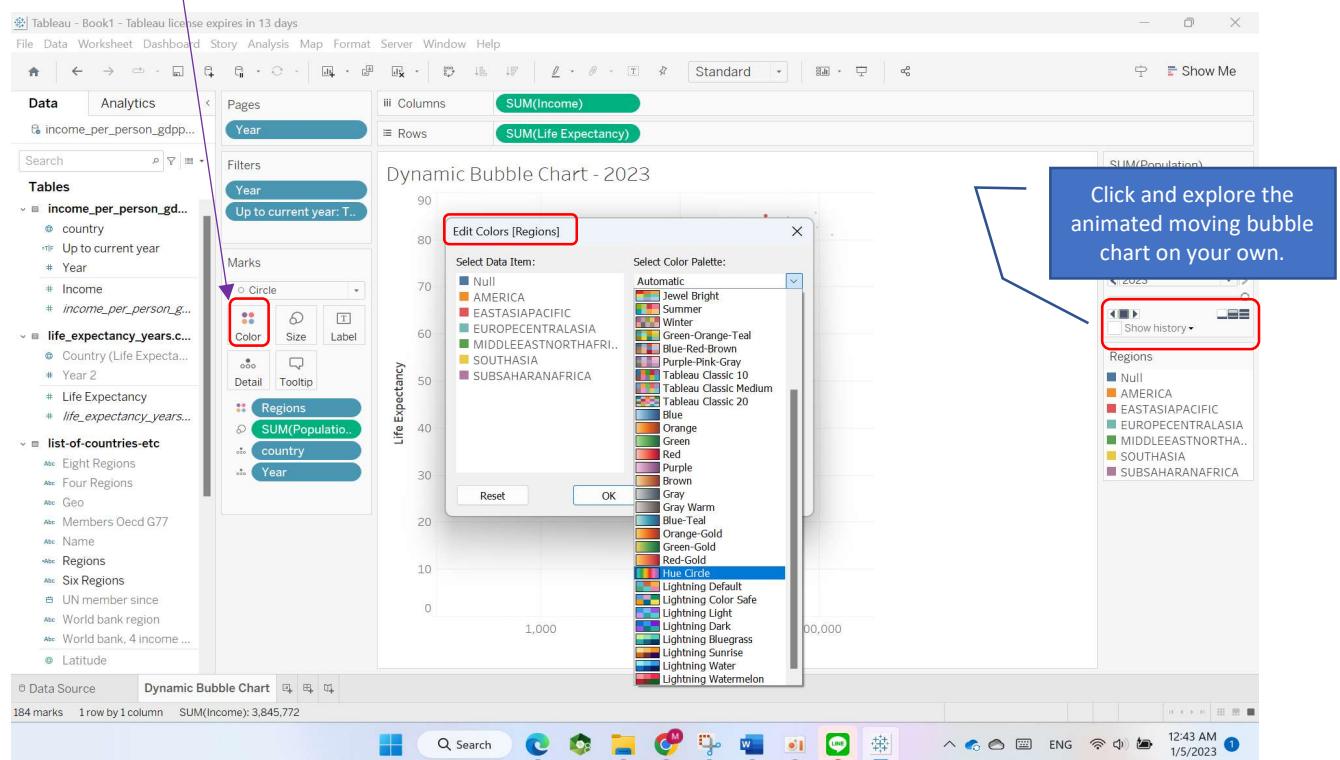


28. We will update the chart name (from “Sheet 1” to “Dynamic Bubble Chart”).

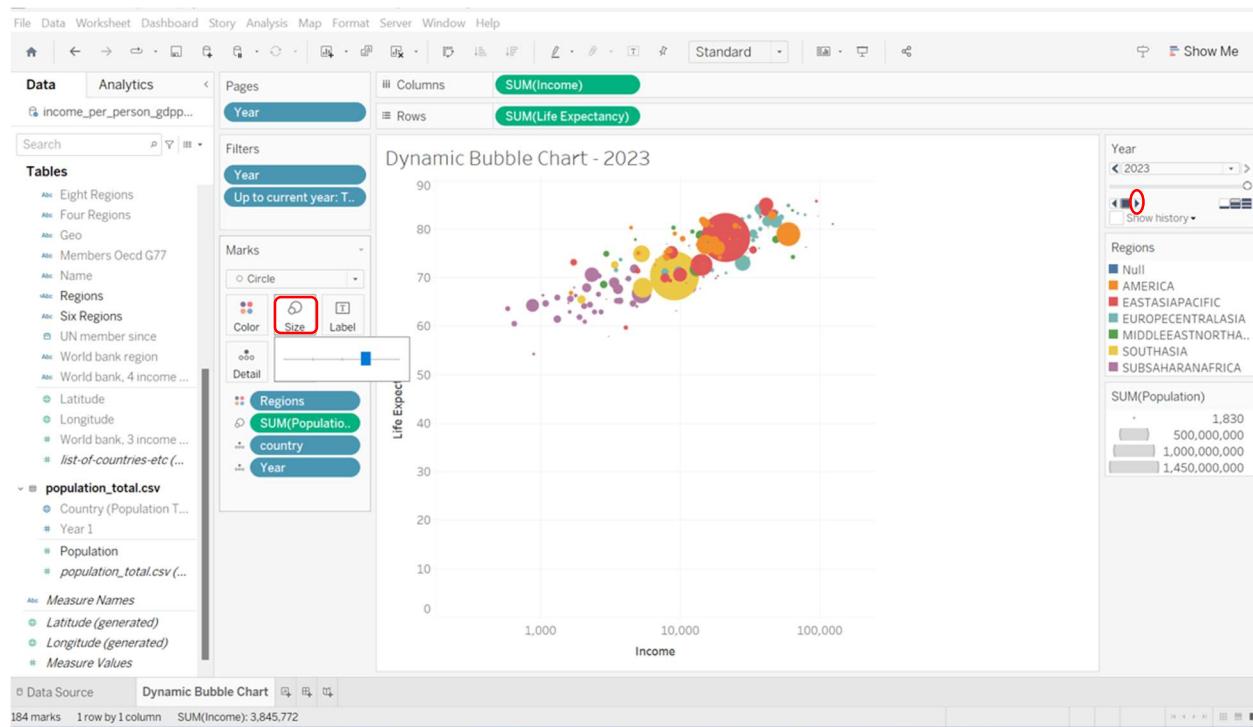


Hint: just click the name of the sheet and we can change its name.

29. We can modify the colors for the aesthetic purposes. Just click Color to Edit colors.

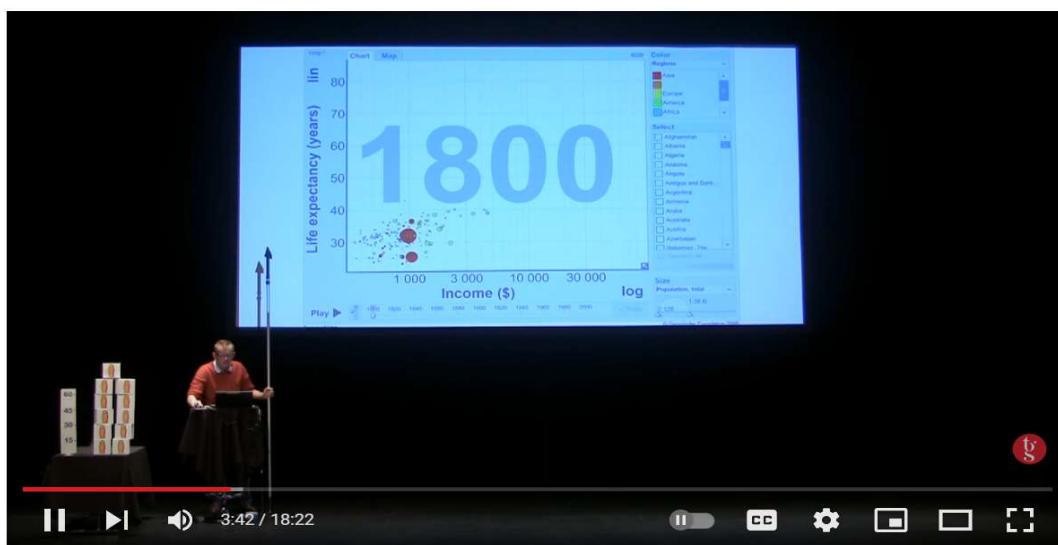


30. We can also click the Size icon to further modify the size of the circles in this bubble chart.



Finally, we are ready to demonstrate an animated moving bubble chart and tell our story by clicking a forward triangle button (see a red circle shown on the previous page). If you wonder how to give an impressive live presentation using the dynamic charts, you might find **Prof. Hans Rosling's** presentation of relevance. Please click the underlined link for a MUST SEE presentation: Please do watch the first four-minute video, and then feel free to briefly scan through the rest of this YouTube video.

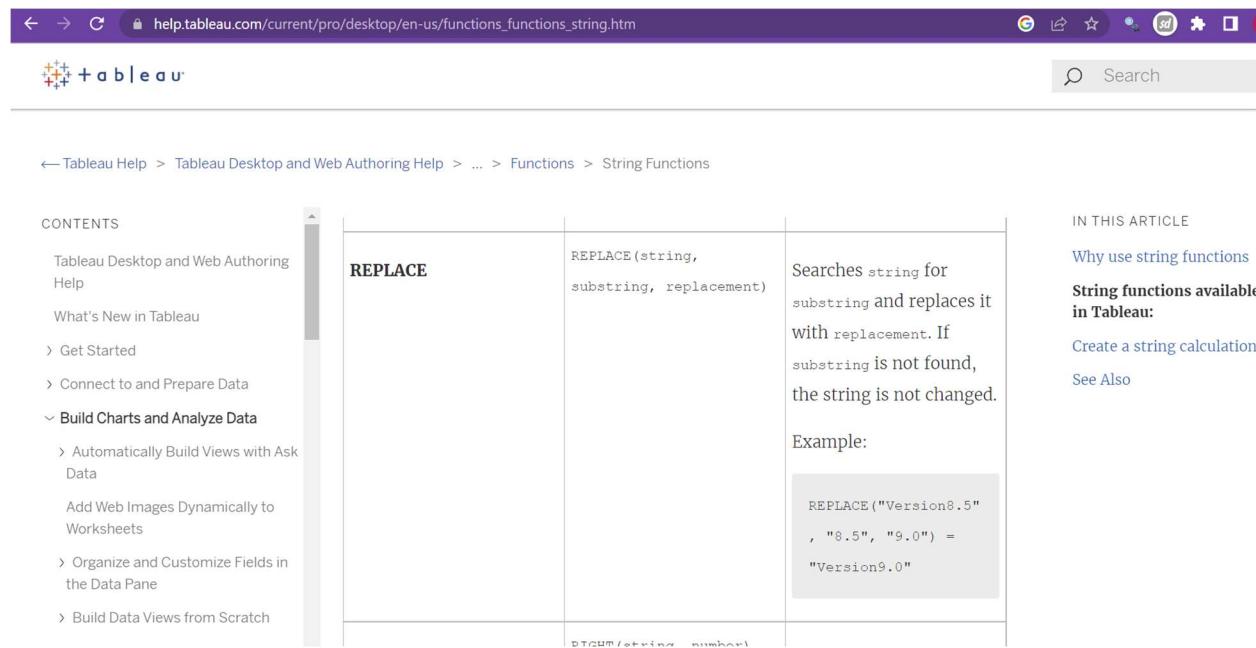
https://www.ted.com/talks/hans_rosling_new_insights_on_poverty?referrer=playlist-the_best_hans_rosling_talks_yo&autoplay=true



Correlating income and life expectancy throughout history | Hans Rosling | TGS.ORG

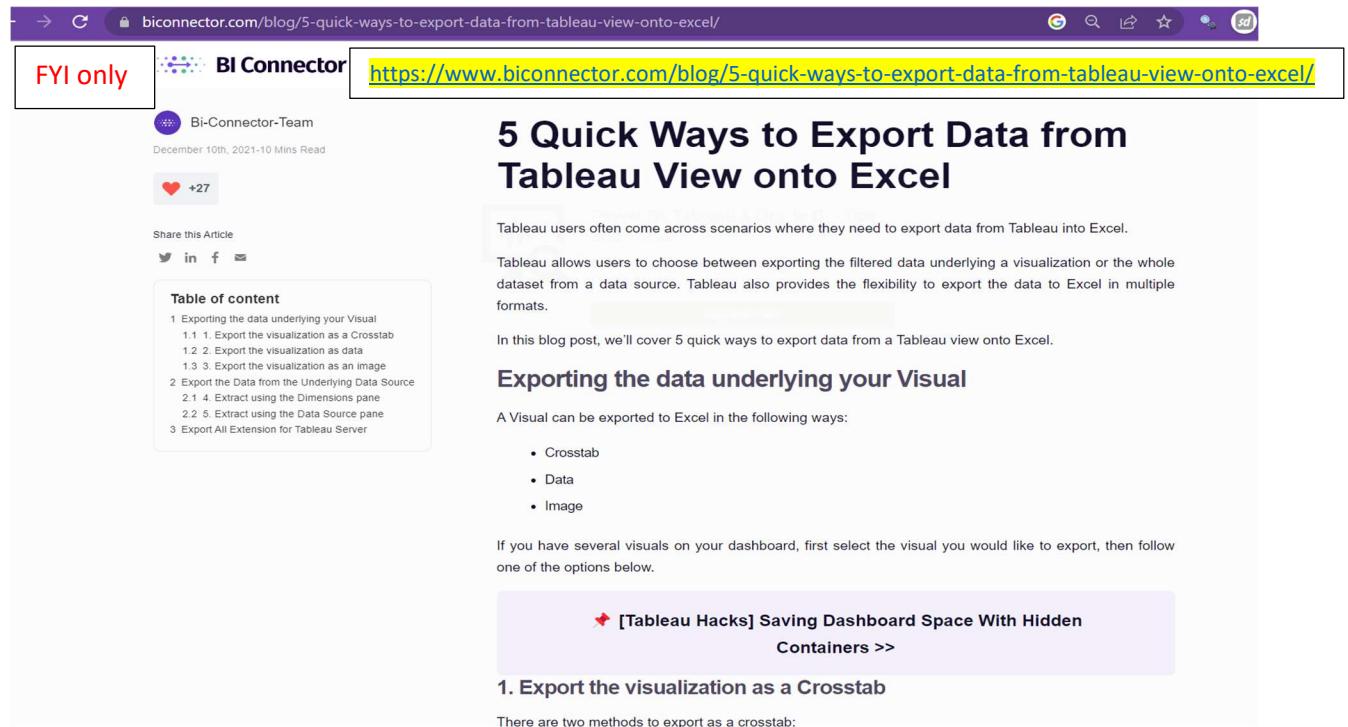
Appendix:

1. Tableau's main functions (e.g., Replacement) could be found online:
<https://help.tableau.com/current/pro/desktop/en-us/functions.htm>



The screenshot shows the Tableau Help website with the URL https://help.tableau.com/current/pro/desktop/en-us/functions_string.htm in the address bar. The page title is "String Functions". On the left, there is a navigation sidebar with "CONTENTS" and a list of topics under "Tableau Desktop and Web Authoring Help". The main content area displays a table for the "REPLACE" function, which includes the syntax `REPLACE(string, substring, replacement)`, a description of how it searches for a substring and replaces it with a replacement, and an example code block showing `REPLACE("Version8.5", "8.5", "9.0") = "Version9.0"`. To the right, there is a "IN THIS ARTICLE" sidebar with links to "Why use string functions", "String functions available in Tableau:", "Create a string calculation", and "See Also".

2. Feel free to Google search for additional Tableau tips (e.g., how to export data from Tableau View onto Excel or a relational database).



The screenshot shows a blog post titled "5 Quick Ways to Export Data from Tableau View onto Excel" by Bi-Connector Team. The post has a red "FYI only" box at the top left. It includes a table of contents with five methods for exporting data. The first method is "Exporting the data underlying your Visual", which is expanded to show sub-points like "Export the visualization as a Crosstab", "Export the visualization as data", etc. A callout box at the bottom right points to "[Tableau Hacks] Saving Dashboard Space With Hidden Containers >>". Below the table of contents, there is a note about selecting a visual on a dashboard and a section for exporting as a Crosstab.

Tableau - 2023-0105_Tableau_DynamicBubbleChart [Recovered] - Tableau license expires in 11 days

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Data

- New Worksheet Ctrl+M
- Copy
- Image...
- Export
- Clear
- Actions... Ctrl+Shift+A
- Tooltip...

Columns **SUM(Income)**

Rows **SUM(Life Expectancy)**

Dynamic Bubble Chart - 2023

Year
2023

Regions

- Null
- AMERICA
- EASTASIAPACIFIC
- EUROPECENTRALASIA
- MIDDLEEASTNORTHAFRICA

Dynamic Bubble Chart - 2023

Pages Columns **SUM(Income)**

Rows **SUM(Life Expectancy)**

Filters Year
Up to current year: T..

Marks Circle

Color, Size, Label

Detail, Tooltip

Regions, SUM(Population), country, Year

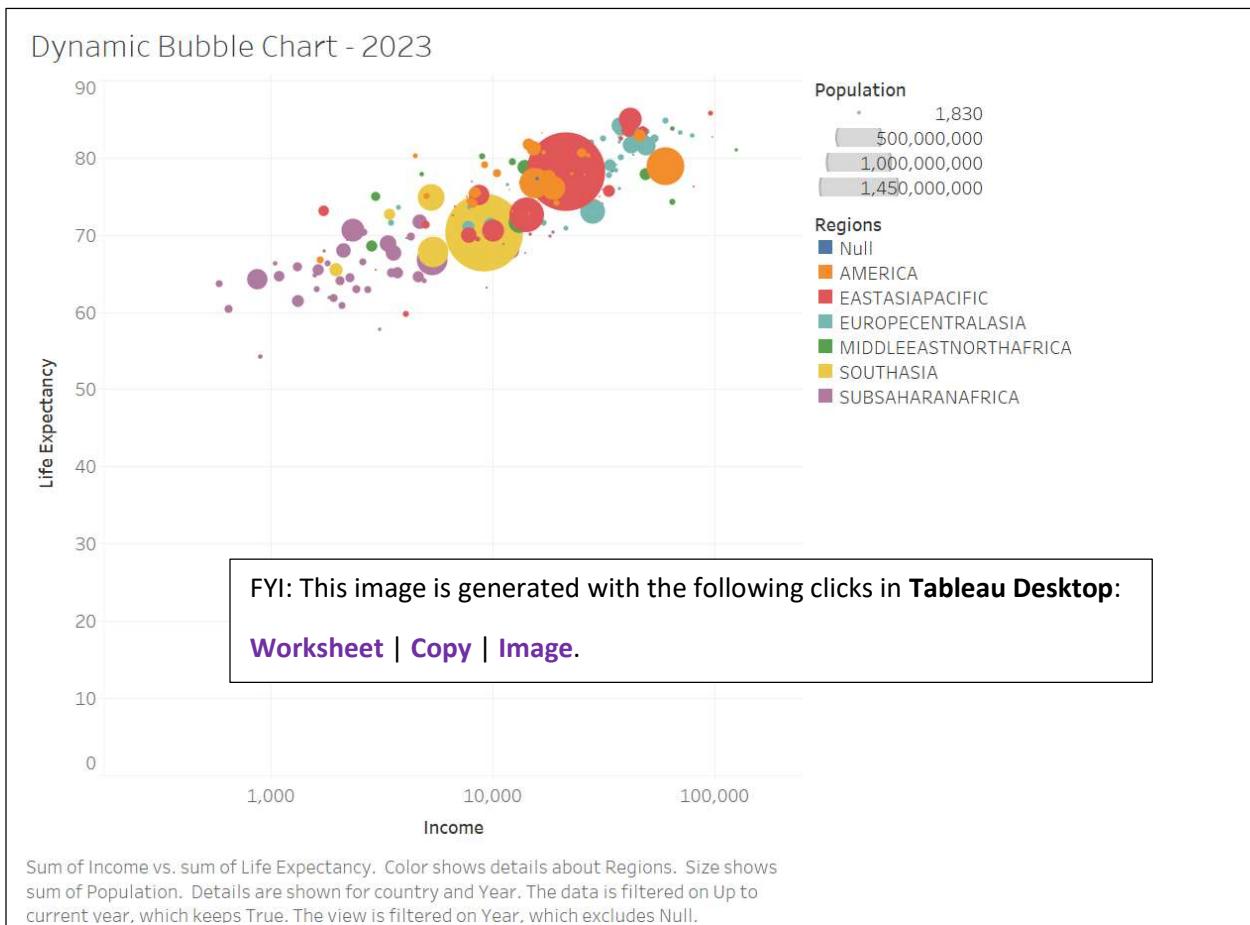
Copy Image

Show Title, View, Caption, Color Legend, Shape Legend, Size Legend

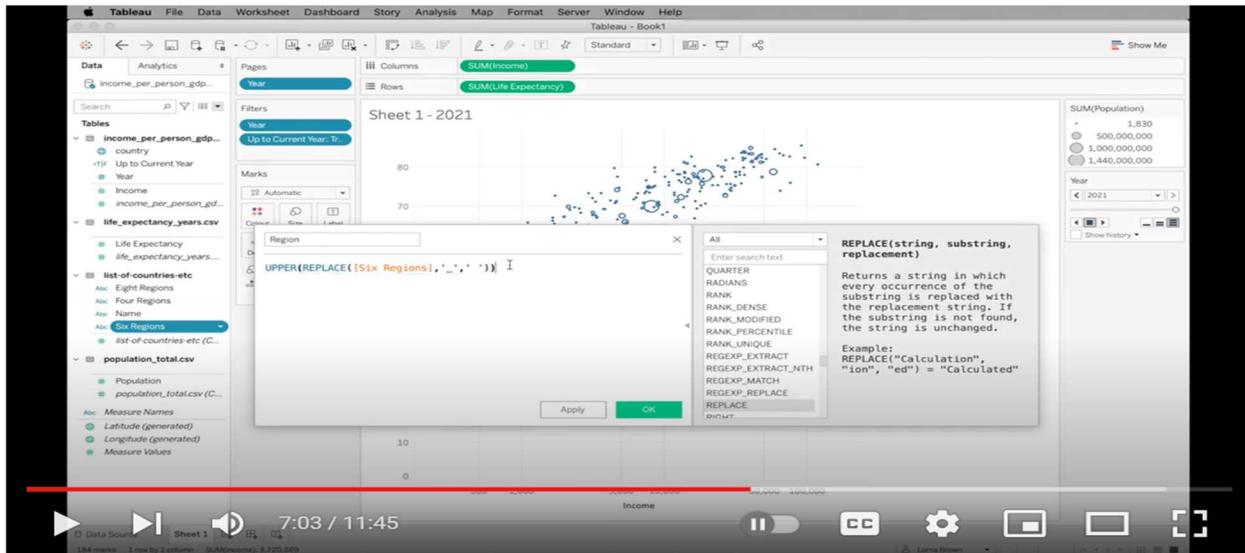
Image Options

Data Source Dynamic Bubble Chart

184 marks 1 row by 1 column SUM(Income): 3,845,772

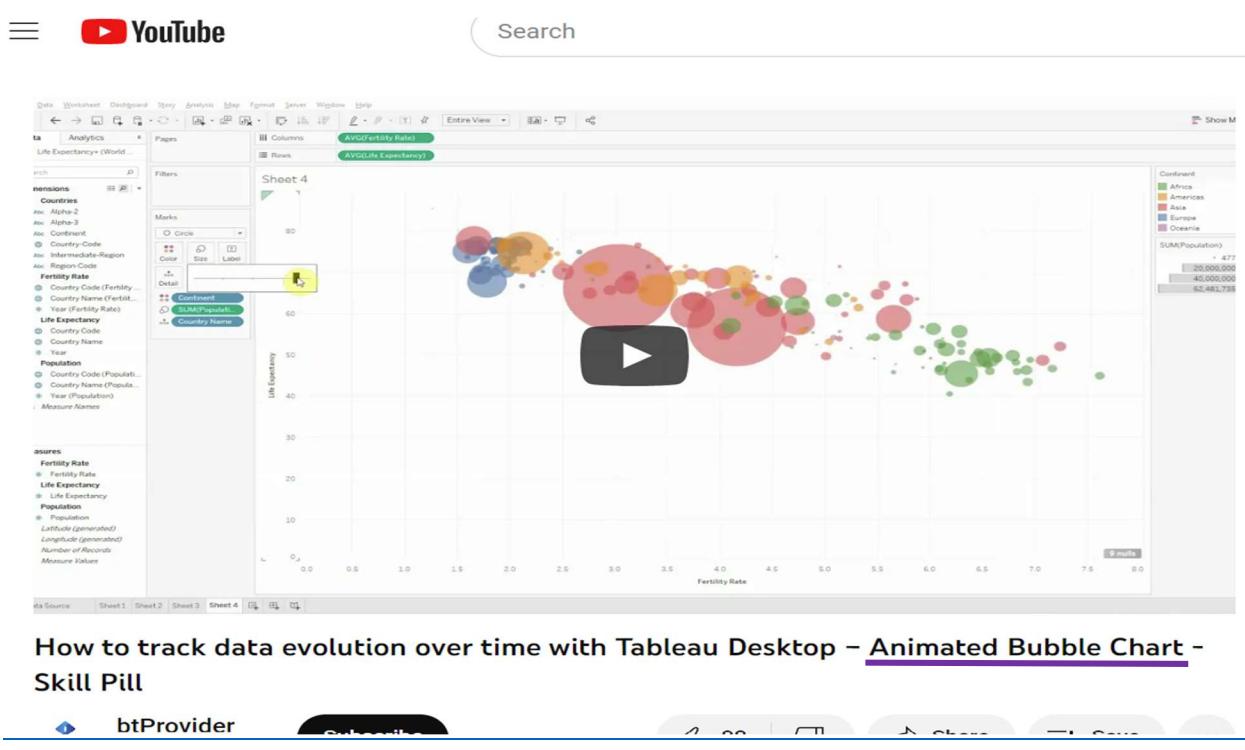


3. If you (the audience) prefer to watch a Tableau bubble chart creation video, you may find the following two YouTube videos of help.



#WOW2021 Week 11 | Tableau : Can you recreate the work of Hans Rosling?





How to track data evolution over time with Tableau Desktop – Animated Bubble Chart – Skill Pill

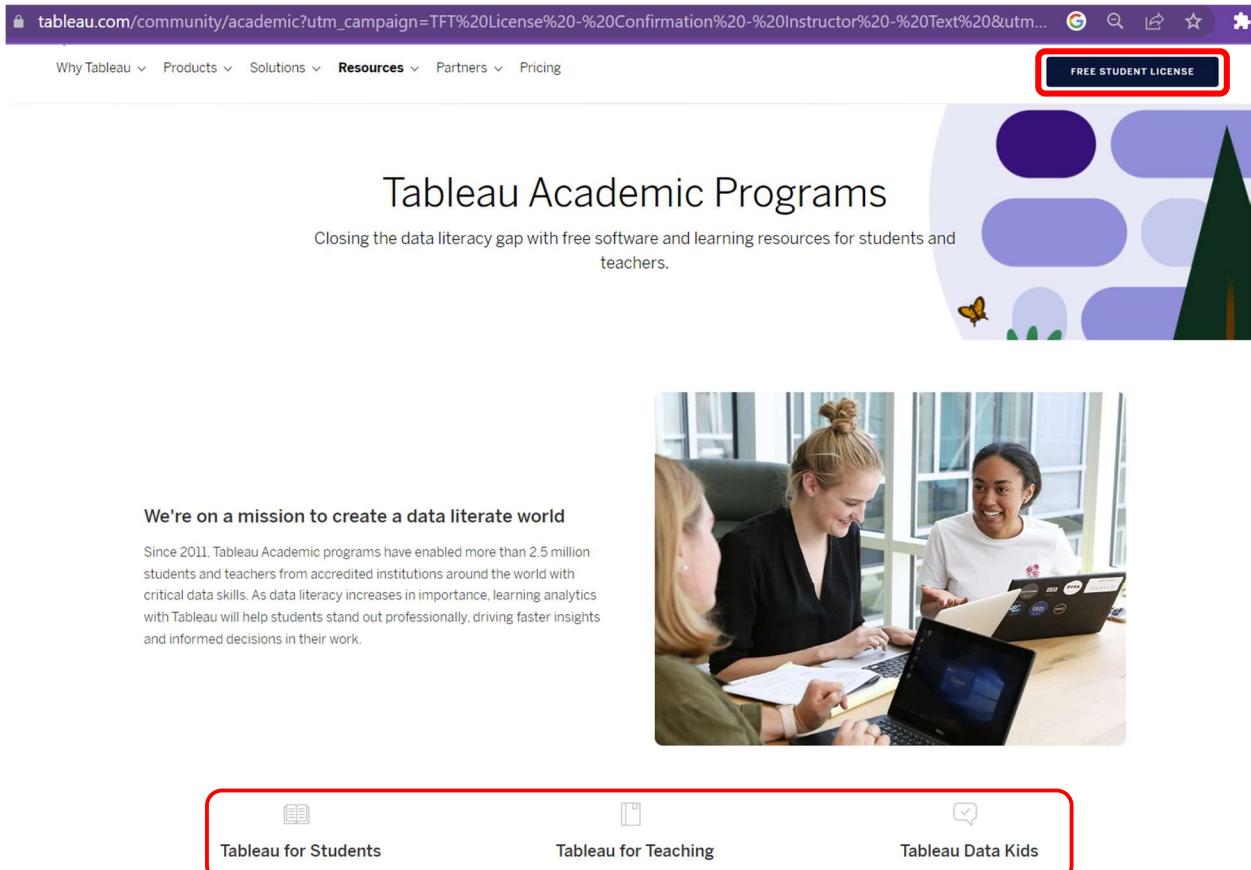


4. Tableau also offers quite a few training videos (<https://tabsoft.co/3QuMLGp>). Happy learning!

The screenshot shows the Tableau Learning page for 2022.2. At the top, there's a navigation bar with links for Why Tableau, Products, Solutions, Resources, Partners, and Pricing. On the right, there are buttons for SIGN IN, BUY NOW, and TRY NOW. Below the navigation, a search bar is present. The main content area is titled "Free Training Videos" and "2022.2". A section titled "Creator" describes responsibilities for deep data prep and analysis. It lists three video categories: "Getting Started" (9 videos, 20 min), "Tableau Prep" (2 videos, 10 min), and "1 VIDEO". To the right, a sidebar titled "More ways to learn and connect" includes a link to "What's New in Tableau 2022.4" which features short demos of new functionalities.

The screenshot shows a specific video titled "Getting Started: Web Authoring in Tableau Online" by James Pollard, a Learning Experience Designer. The video player interface shows a play button, volume control, and a progress bar at 0.01 / 0.22. To the right of the video, a sidebar titled "CURRENT TOPIC: Getting Started" lists several video thumbnails with titles and durations: "Getting Started" (1 MIN), "Tableau Cloud" (1 MIN), "Connecting to Data" (2 MIN), "The Workspace Area" (2 MIN), "Map: Profit Ratio by Geography" (2 MIN), "Area Charts: Sales by Category; Sales by Segment" (5 MIN), and "Text Table: Key Performance Indicators" (2 MIN).

5. To learn more about available Tableau programs, check out its Academic Community page:
<https://tabsoft.co/3vOkq4m>



Why Tableau ▾ Products ▾ Solutions ▾ **Resources** ▾ Partners ▾ Pricing

FREE STUDENT LICENSE

Tableau Academic Programs

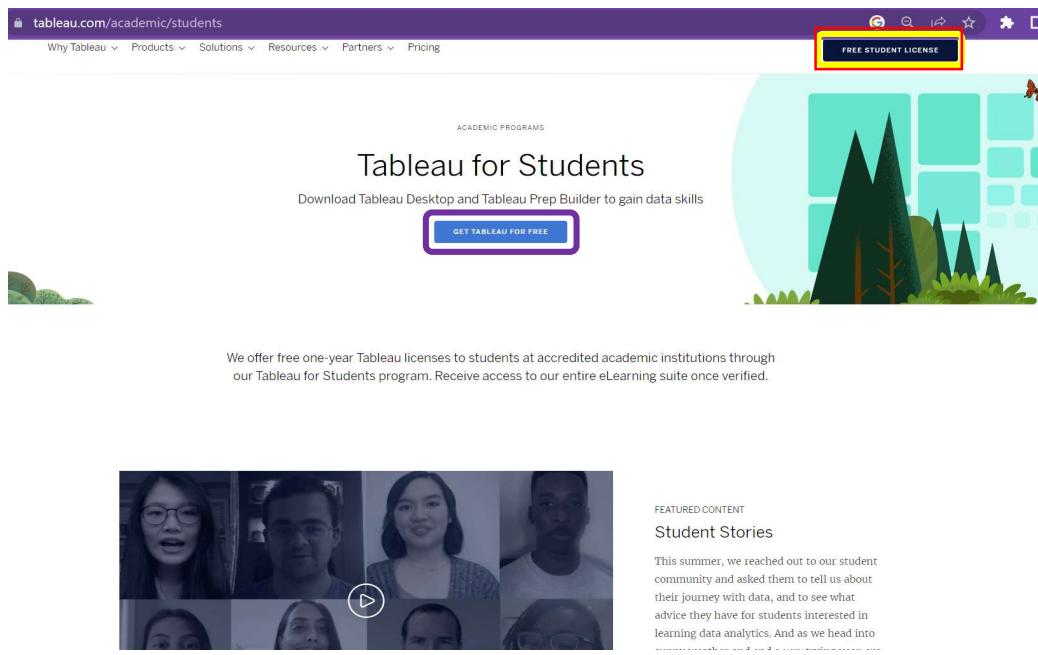
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FEATURED CONTENT

Student Stories

This summer, we reached out to our student community and asked them to tell us about their journey with data, and to see what advice they have for students interested in learning data analytics. And as we head into

LEARN MORE

Acknowledgement: Special thanks to Prof. Gary H.T. Chao for his constructive comments toward a draft version of this 30-step Tableau Bubble chart learning tutorial.

Hsu 24