On-Demand Training: Story Points Transcript

Welcome to this video on Story Points. You can download the Exercises workbook to follow along in your own copy of Tableau.

What Are Story Points

Story Points let you create compelling, interactive, data-driven stories.

Stories consist of specific views or dashboards in a sequential presentation, for example walking the audience through a discovery you made as you were analyzing data. Dashboards can tell you the WHAT; stories tell you the WHY.

Let's see what that means. Here we have a workbook that already has several visualizations and a dashboard built out.

Story Points allows us to present them to communicate insight we want to share.

Creating a New Story

To create a new Story, click on the Story tab down at the bottom.

We can size this story so it best fits our dimensions.

Adding Content

Just like when building a dashboard, our previously created pieces of content are arranged here on the left. Hovering brings up a preview. Let's click and drag our first sheet onto the canvas.

We can give this point a caption by clicking in the navigator box. I'll be adding captions as I go to help keep track of the points, you may want to pause the video to type the captions yourself.

- If the caption doesn't fit, we can click here and adjust the size of the navigator

Updating a Point

This visualization is still fully interactive, as we can see by clicking through the filter.

Did you notice that when we changed the state of the viz, the word "Update" appeared above the navigator box?

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

Clicking "Update" preserves our modification for this point, essentially taking a snapshot of the filter selection we made. Alternatively, we could revert by clicking the undo icon.

When a change to the Point is made, we're also presented with the option to Save as a New Point. It's the same underlying visualization, but with that filter selection saved as the default.

Creating Additional Points

Let's expand our story.

To keep track of what sheets have been used, this blue check means that the item has already been added to the story.

There are a lot of ways to add additional points to a story. Let's go through the options:

- First, dragging a piece of content to the "Add a New Point" box. This box only shows when we click and hold a piece of content

    - We'll highlight Critical orders and update

- We can also add content by using the buttons next to the navigator, that says New Blank Point.

- Double clicking content brings it into the story.

    - We'll highlight again, and click update

- As a note, if we bring out the wrong thing, simply dragging out a different sheet will replace it. Hovering over a box also brings up the delete button.

- To bring out a sheet out to a specific position, we could drag it to the navigator until we see a blue arrow, like so.

    - Click on the column header and update

If we want to display more than one visualization on a single point, we have to bring them out as a dashboard.

Fitting Visualizations in Stories

What happens when we bring out a dashboard?

Here, because we changed the default size of our story, the dashboard doesn't look good when it's nested. To easily fix the sizing, go to the underlying dashboard by clicking on this "go to sheet" icon and then we'll set the size to "Fit to Story".

Now back on the story, now it fits perfectly.

Similarly, if it's a visualization that doesn't fit well on the story, you can go back to the sheet by clicking the icon and changing the fit. Entire View generally works pretty well. On the Story, we see that those scroll bars are gone.

Updating the Underlying Sheet

It's worth noting that ANY changes on the original sheets are reflected in the Storypoints – and most changes to how the viz displays need to be made on the underlying sheet itself.

Here, we can hide the color legend and exclude some of the data.

Back the Story, we see that color legend is gone, and so is the bar.

Rearranging Content

If we need to rearrange content, it's a simple drag and drop in the navigator to change the order.

Click and hold on a box then move it to where it needs to be. The blue arrow indicates where the point will go when the mouse button is released.

Annotating with Descriptions

Now that we have our basic points, what if we want our audience to know that they can interact with this first map?

To annotate the story, we simply add a description by dragging it out. This is a fully editable text box.

The default background color is yellow, but that can be changed by going to the Story menu and selecting Format. Here we can control various aspects of the Story's formatting, such as

- default shading

- The title shading, font, and border

- We can change various aspects of navigator box, such as color and font

- And we can control the descriptions

Navigation and Title

As finishing touches, checking or unchecking this box toggles the Story title. The title is fully editable as a rich text item.

We can also toggle whether or not we want the Back and Forward buttons to show on the navigator. We always have the slider so we know where we are.

Conclusion

Thank you for watching this Story Points training video. We invite you to continue with the On Demand Training videos to learn more about using Tableau Desktop.