

Best practices for formatting your visualizations

INTRODUCTION TO TABLEAU



David Venturi

Curriculum Manager at DataCamp

You're an investor

- **Goals**
 - Grow your investment portfolio
 - Monitor the value of your investments



You're an investor

Facebook, Inc. (FB)

- NASDAQ (USD)



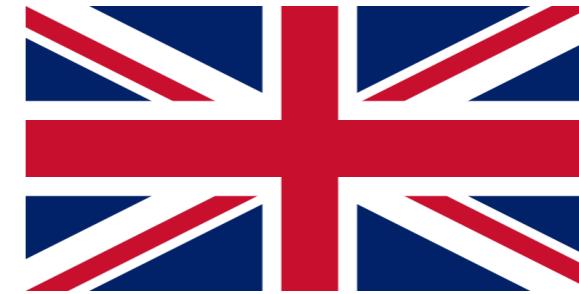
The Toronto-Dominion Bank (TD.TO)

- TSE (CAD)



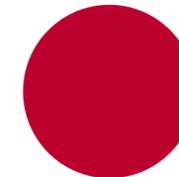
Tesco PLC (TSCO.L)

- LSE (GBP)



Toyota Motor Corporation (7203.T)

- TYO (JPY)



Visualization best practices

A few of the most important ones for Tableau:

- Use color purposefully
- Use readable fonts
- Use tooltips
- Adjust axes as necessary
- Add memorable titles

Format from large to medium to small

Workbook level -> Worksheet level -> Individual parts of a view



Monitor and grow your investments

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- NASDAQ (USD)



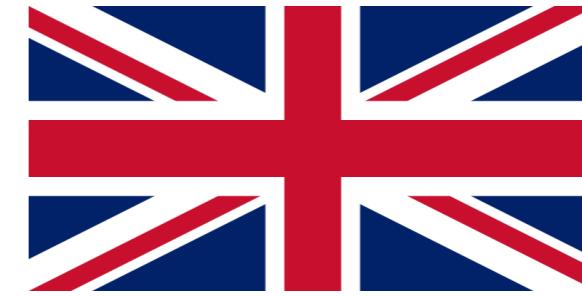
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Let's practice!

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Using color purposefully and readable fonts

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Let's practice!

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Use tooltips and adjust axes as necessary

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Let's practice!

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Dashboards

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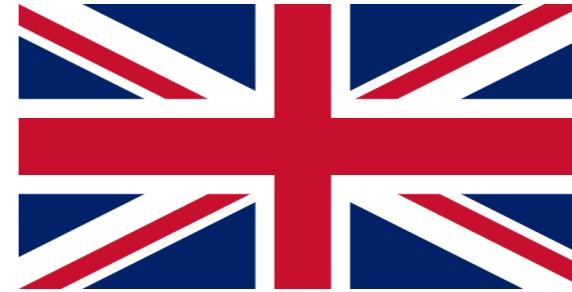
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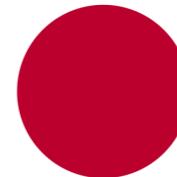
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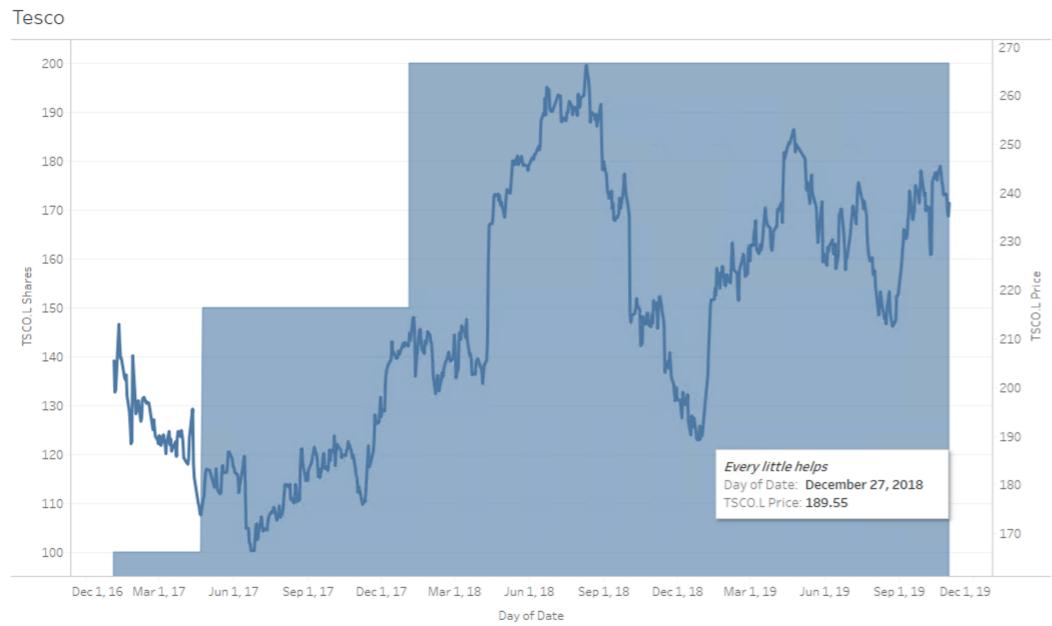
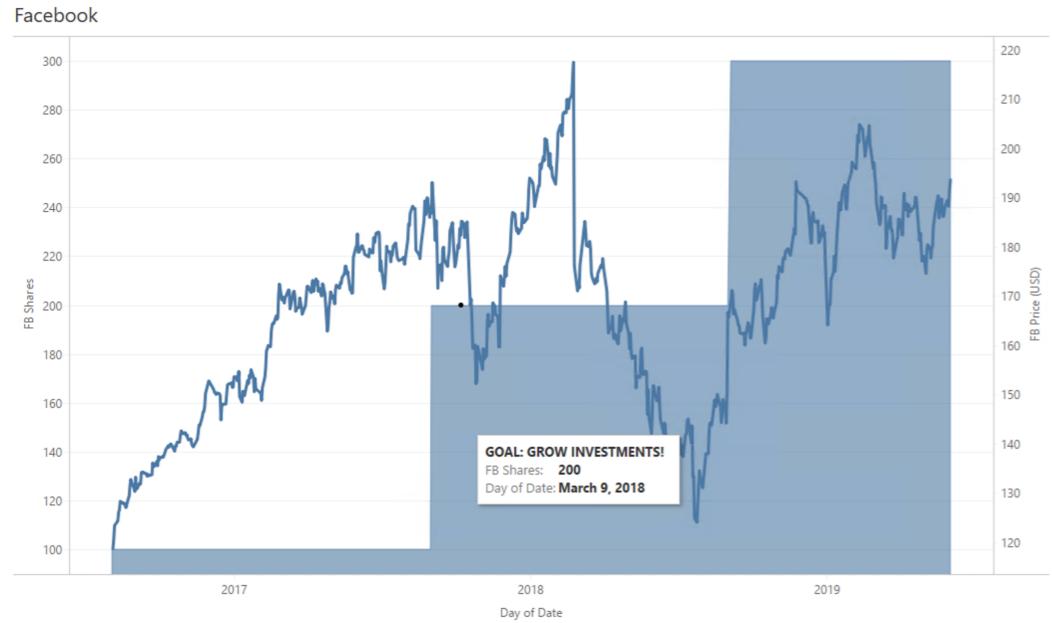


Toyota Motor Corporation (7203.T)

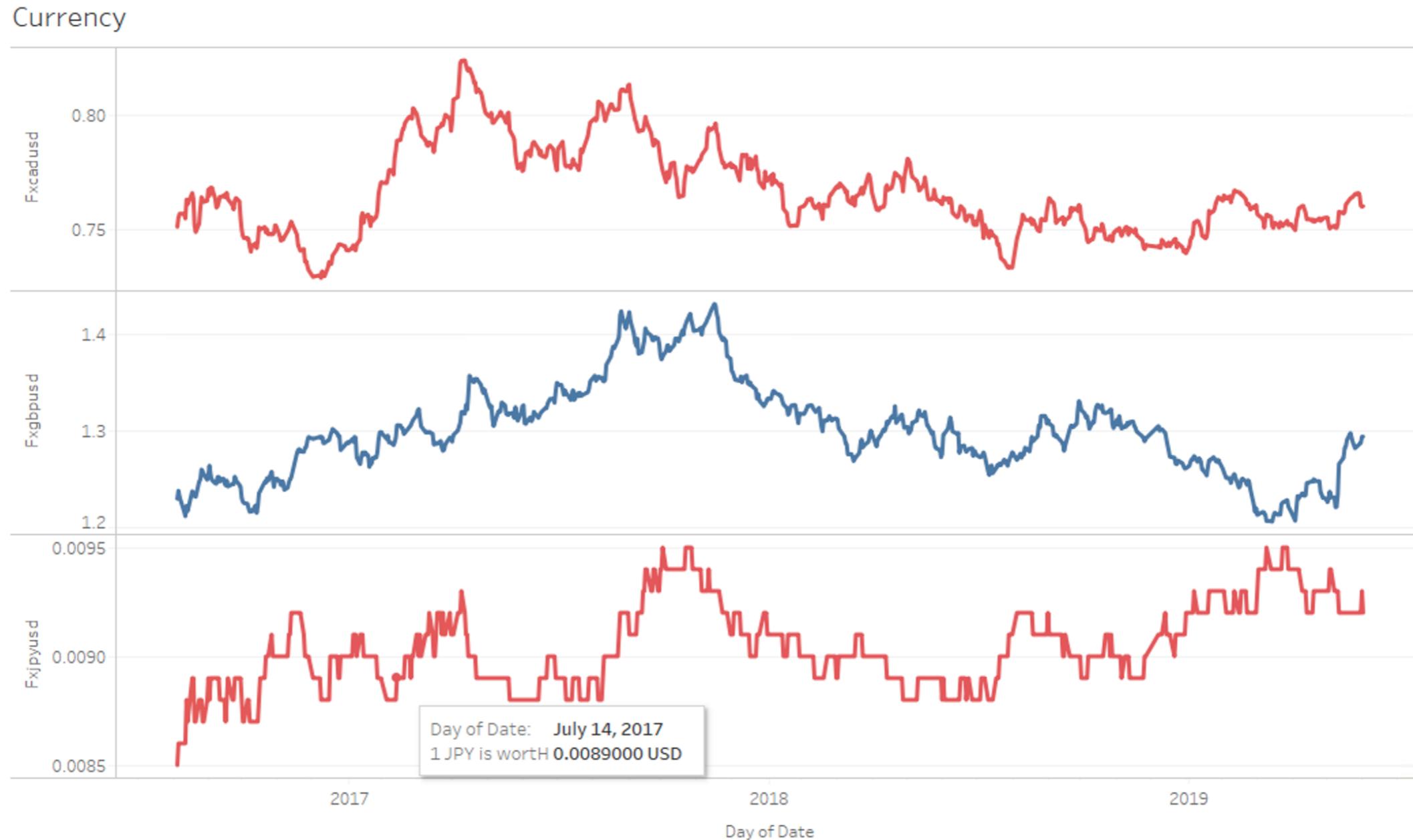
- TYO (JPY)



Monitor stock shares and stock price



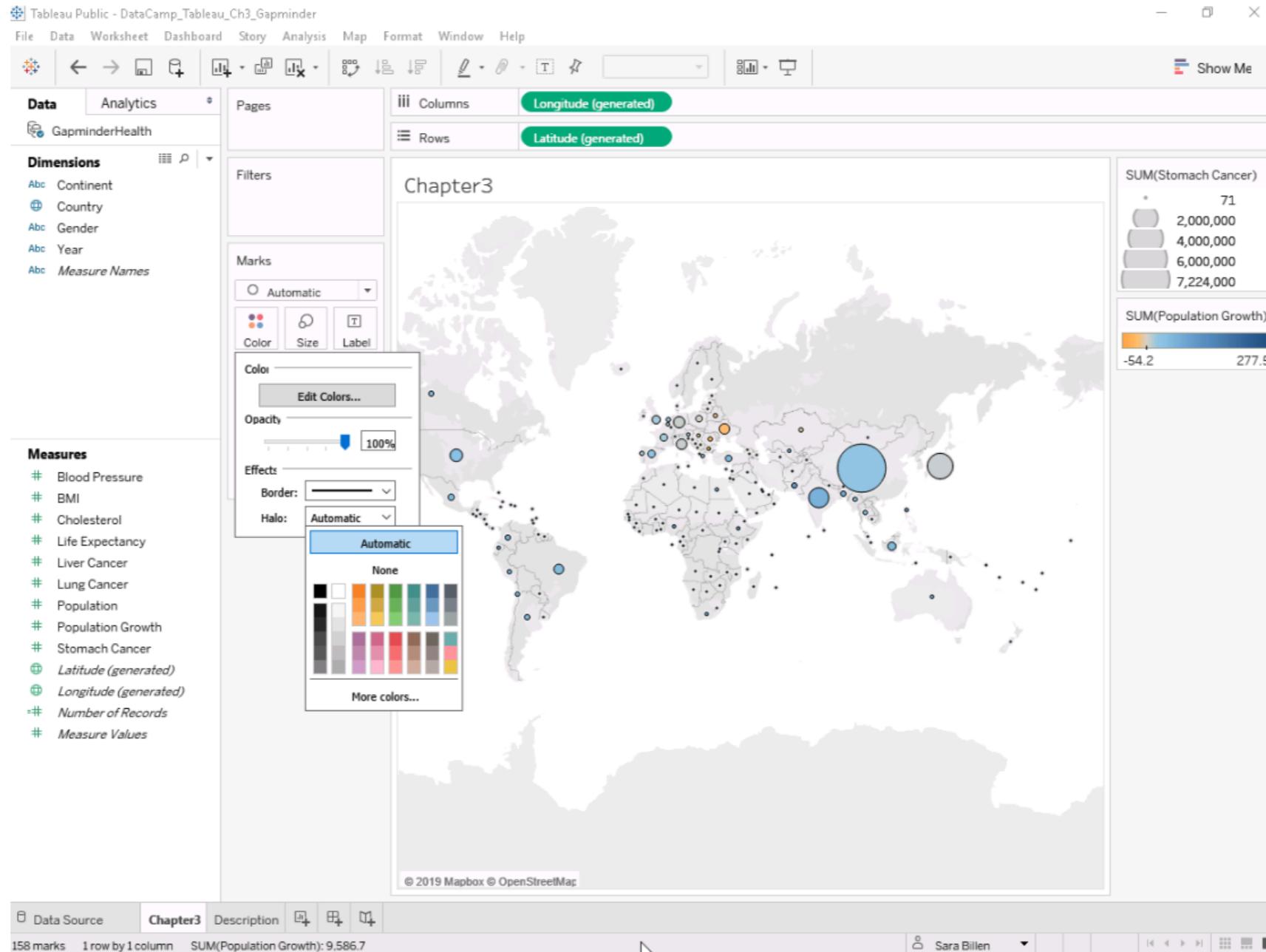
Monitor currency fluctuations



Tableau's workbook and sheet file structure

- A workbook contains sheets.
- A sheet can be a **worksheet**, a **dashboard**, or a **story**.

Worksheet



Dashboard

- A collection of several views
- Access dashboards from tabs at the bottom of a workbook
- Data in sheets and dashboards is connected
- Sheets and dashboards update with the latest available data from the data source(s)

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Create a dashboard

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Customize your dashboard

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Stories

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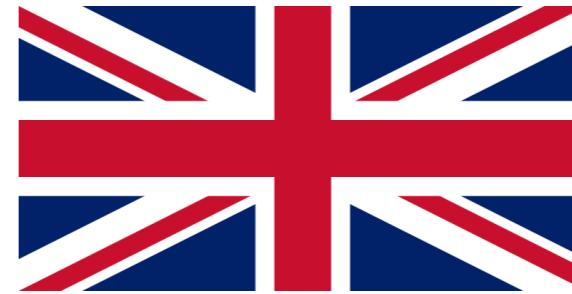
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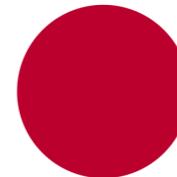
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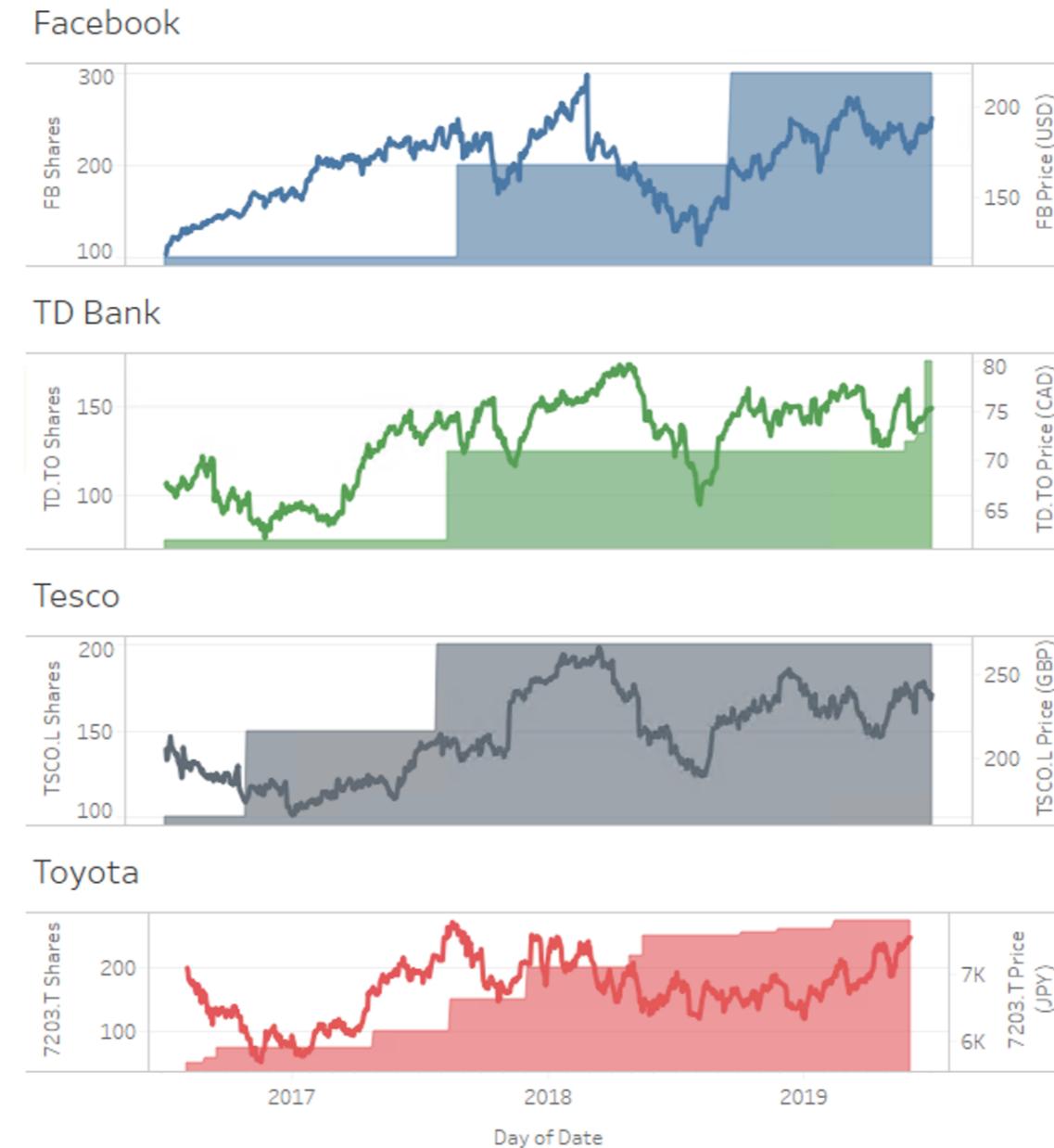


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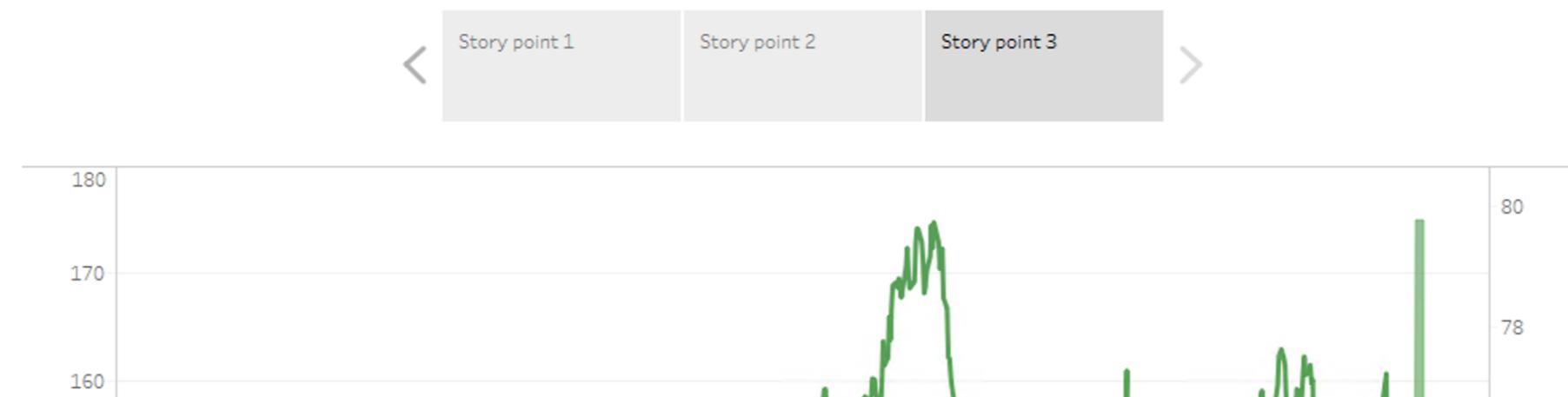
Monitor currency fluctuations



Story

- A sequence of visualizations that work together to convey information
- A story is a sheet
- Also, a story is a collection of sheets
 - Each individual sheet in that collection is called a **story point**
 - Since dashboards are sheets, a story can be collection of dashboards

Story example



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Create a story

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Customize your story

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Congratulations!

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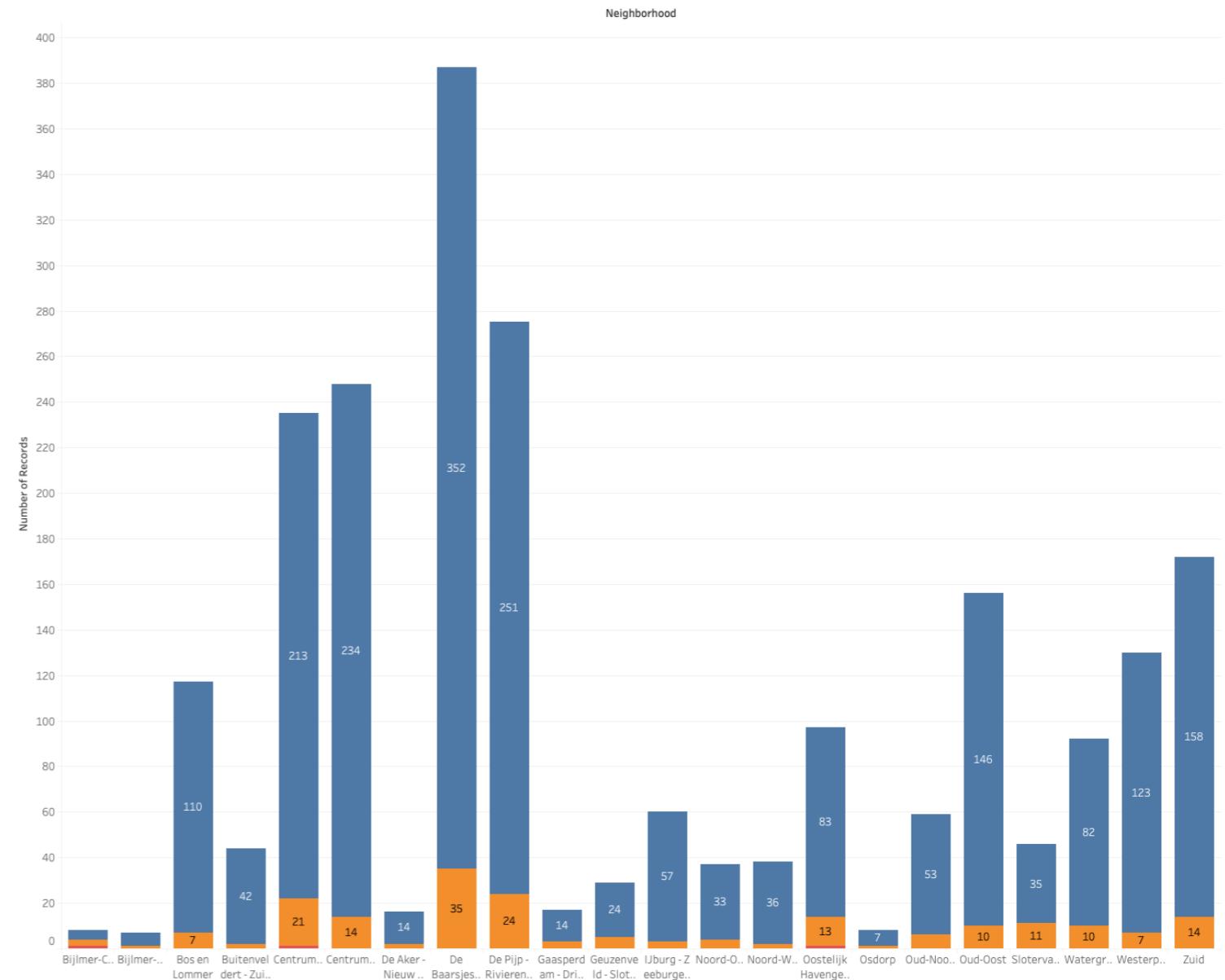


Hadrien Lacroix

Content Developer, DataCamp

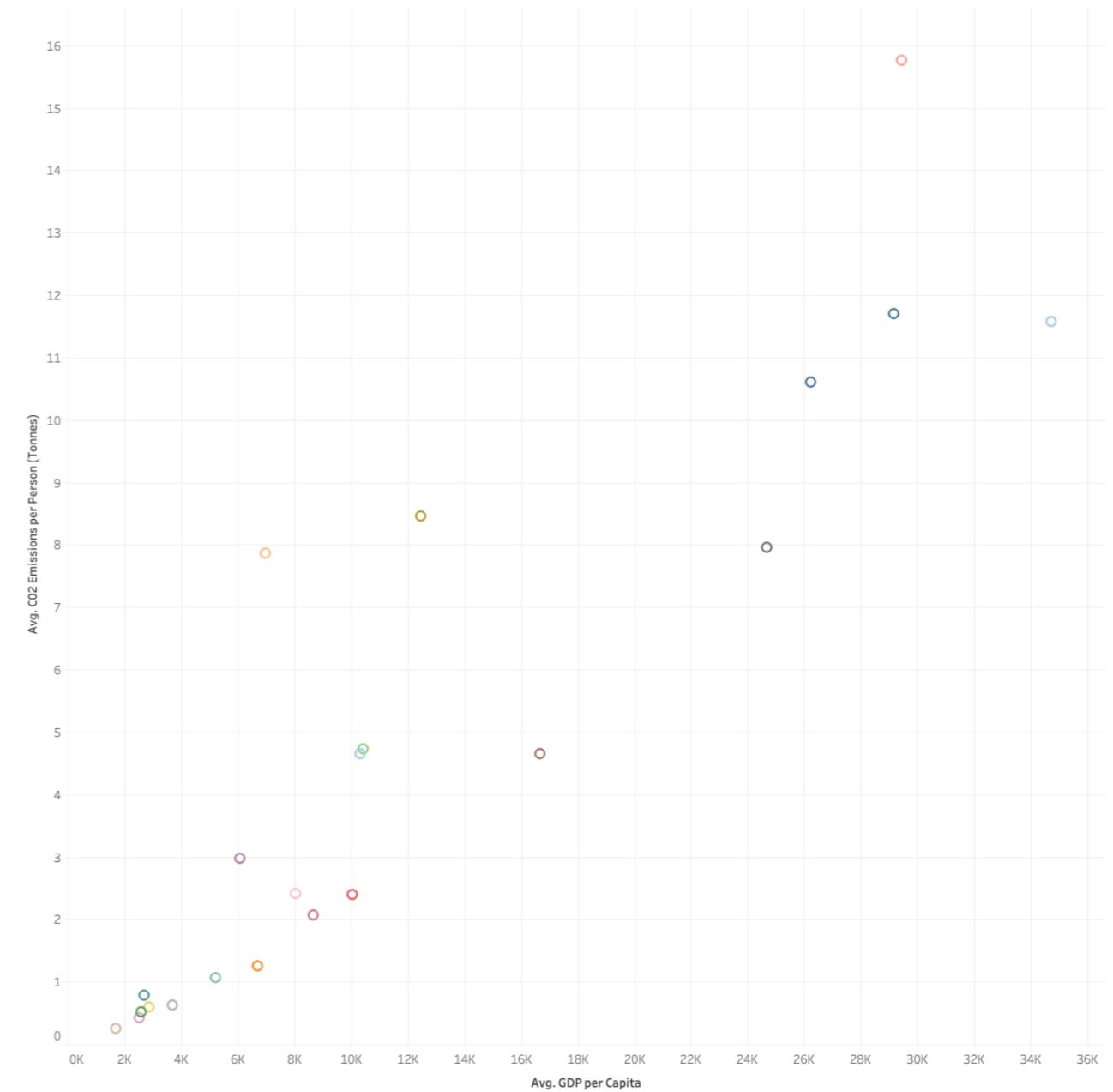
Getting started with Tableau

- Load data and workbooks
- Navigate Tableau
- First visualizations



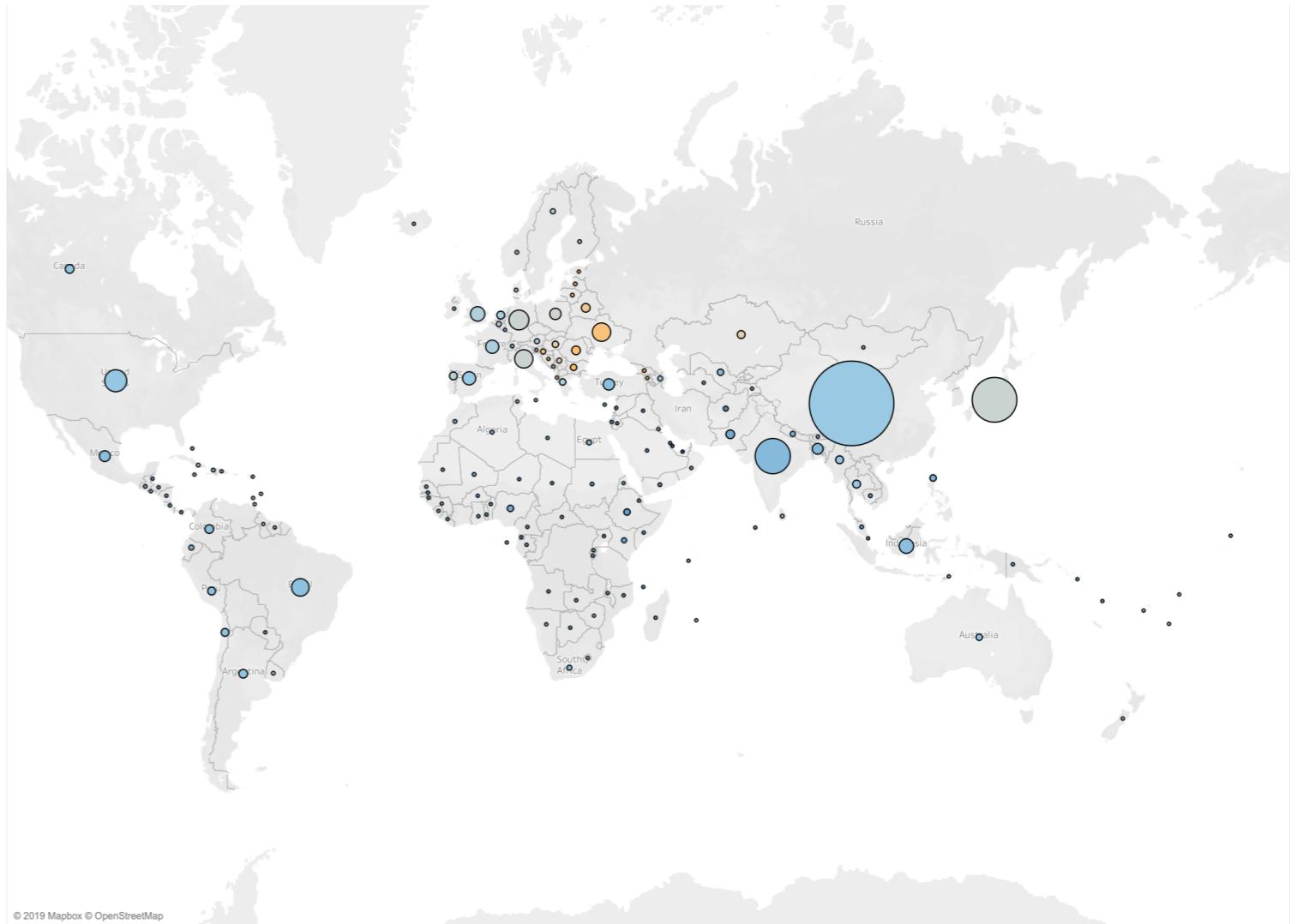
Building and customizing visualizations

- Sorting and filtering
- Aggregation
- Calculated fields



Digging deeper

- Map geographic data
- Work with dates
- Reference lines, trend lines, and forecasting



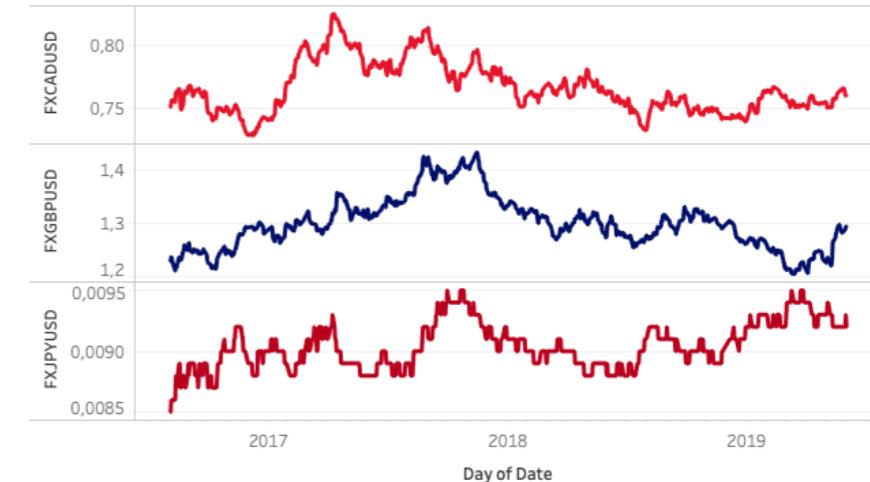
Presenting your data

- Improve and format your visualizations
- Convey findings with Dashboards and Stories

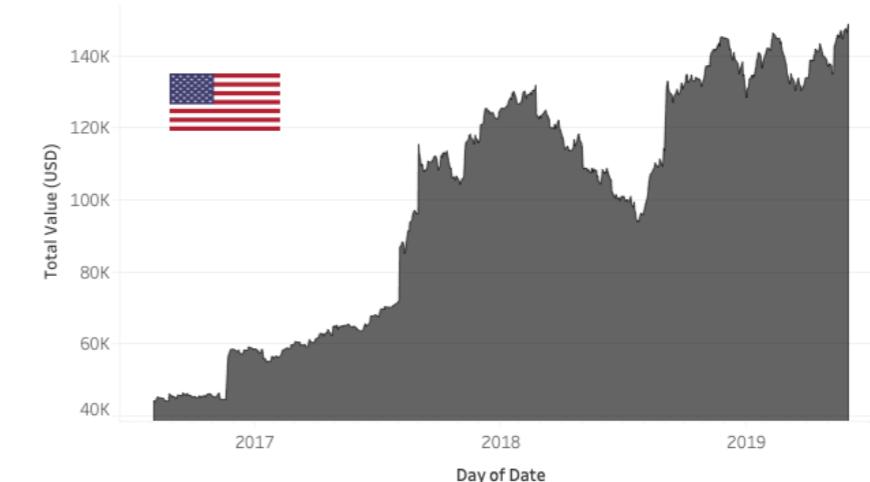
My Portfolio

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The currencies of my portfolio

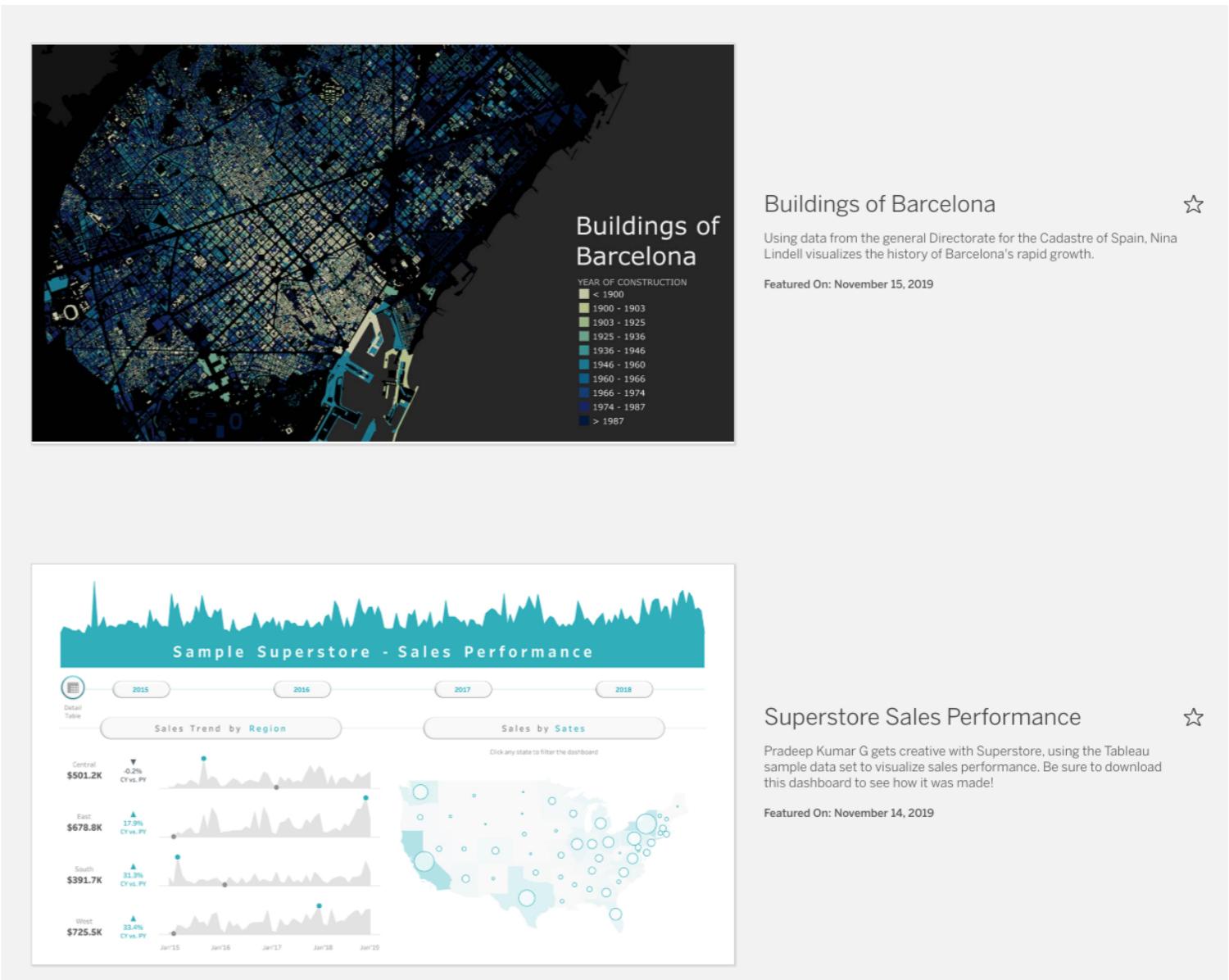


The value of my portfolio in USD



It's just the beginning

- Wide foundational knowledge and skills
- Load data, manipulate it
- Explore and choose appropriate visualization for question
- Improve your viz
- <http://kaggle.com/datasets>
- <https://archive.ics.uci.edu/ml/datasets.php>
- <https://public.tableau.com/en-us/gallery>



Let's practice!

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