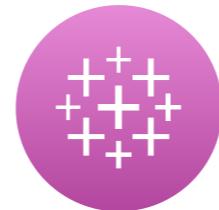


Best practices for formatting your visualizations

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)



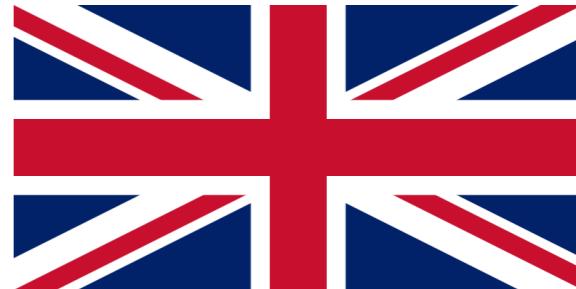
The Toronto-Dominion Bank (TD.TO)

- TSE (CAD)



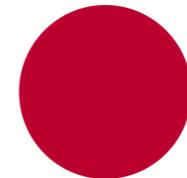
Tesco PLC (TSCO.L)

- 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

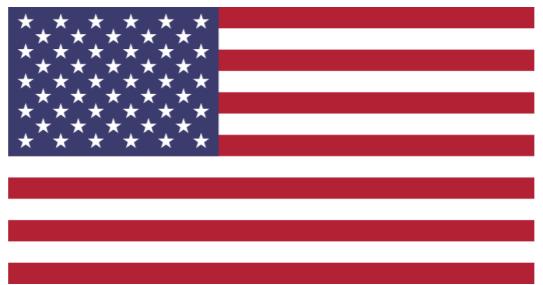
Workbook level -> Worksheet level -> Individual parts of a view



Monitor and grow your investments

Facebook, Inc. (FB)

- NASDAQ (USD)



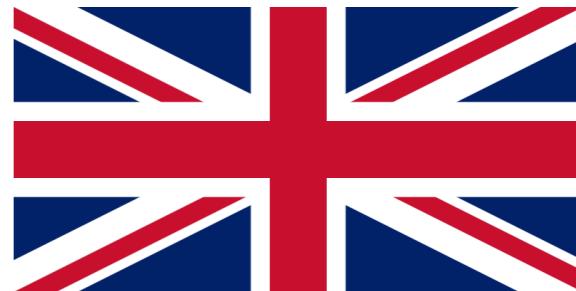
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Let's practice!

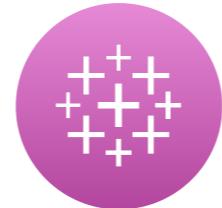
INTRODUCTION TO TABLEAU

Using color purposefully and readable fonts

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David Venturi

Curriculum Manager at DataCamp



Let's practice!

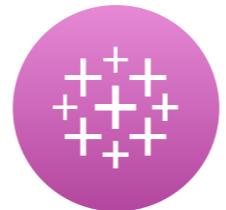
INTRODUCTION TO TABLEAU

Use tooltips and adjust axes as necessary

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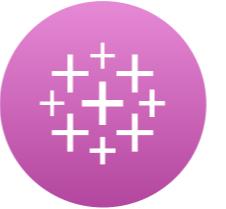


Let's practice!

INTRODUCTION TO TABLEAU

Dashboards

INTRODUCTION TO TABLEAU



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Curriculum Manager at DataCamp

You're an investor

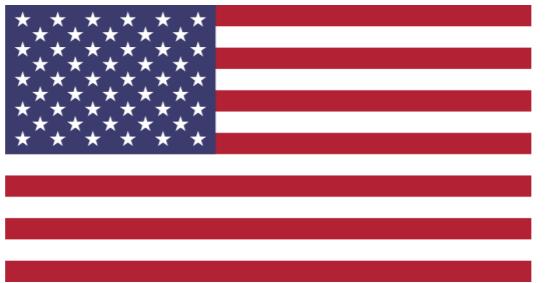
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- TSE (CAD)



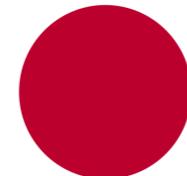
Tesco PLC (TSCO.L)

- LSE (GBP)

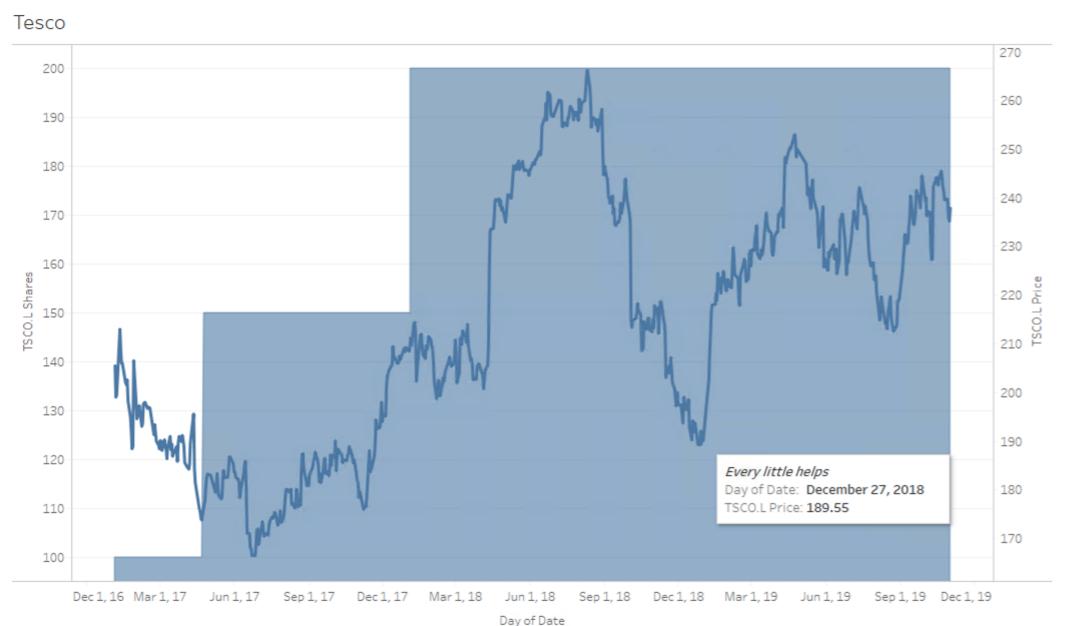
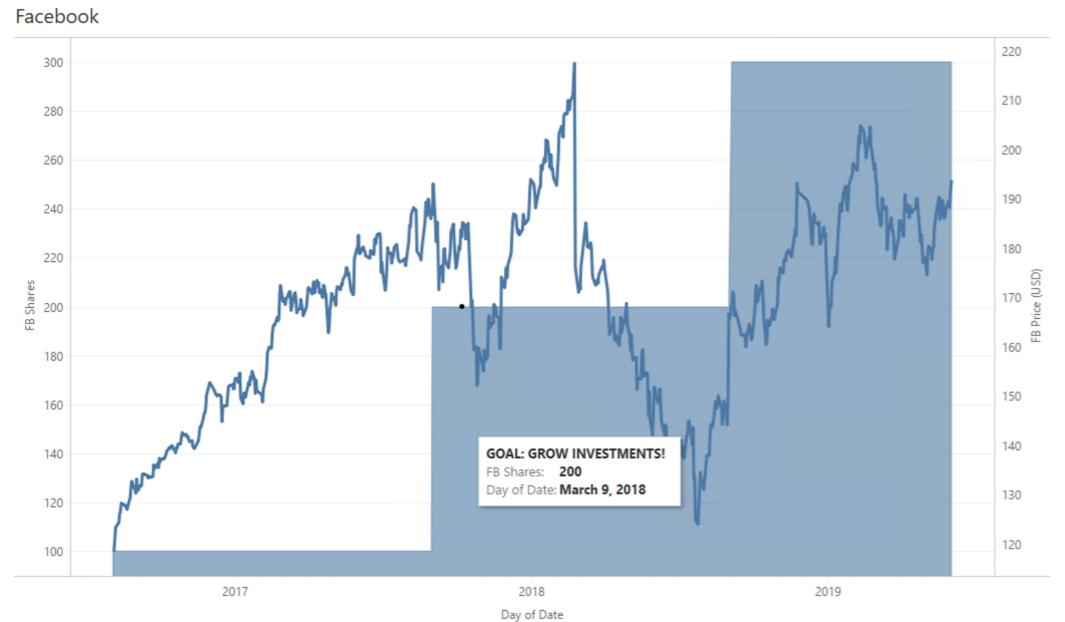


Toyota Motor Corporation (7203.T)

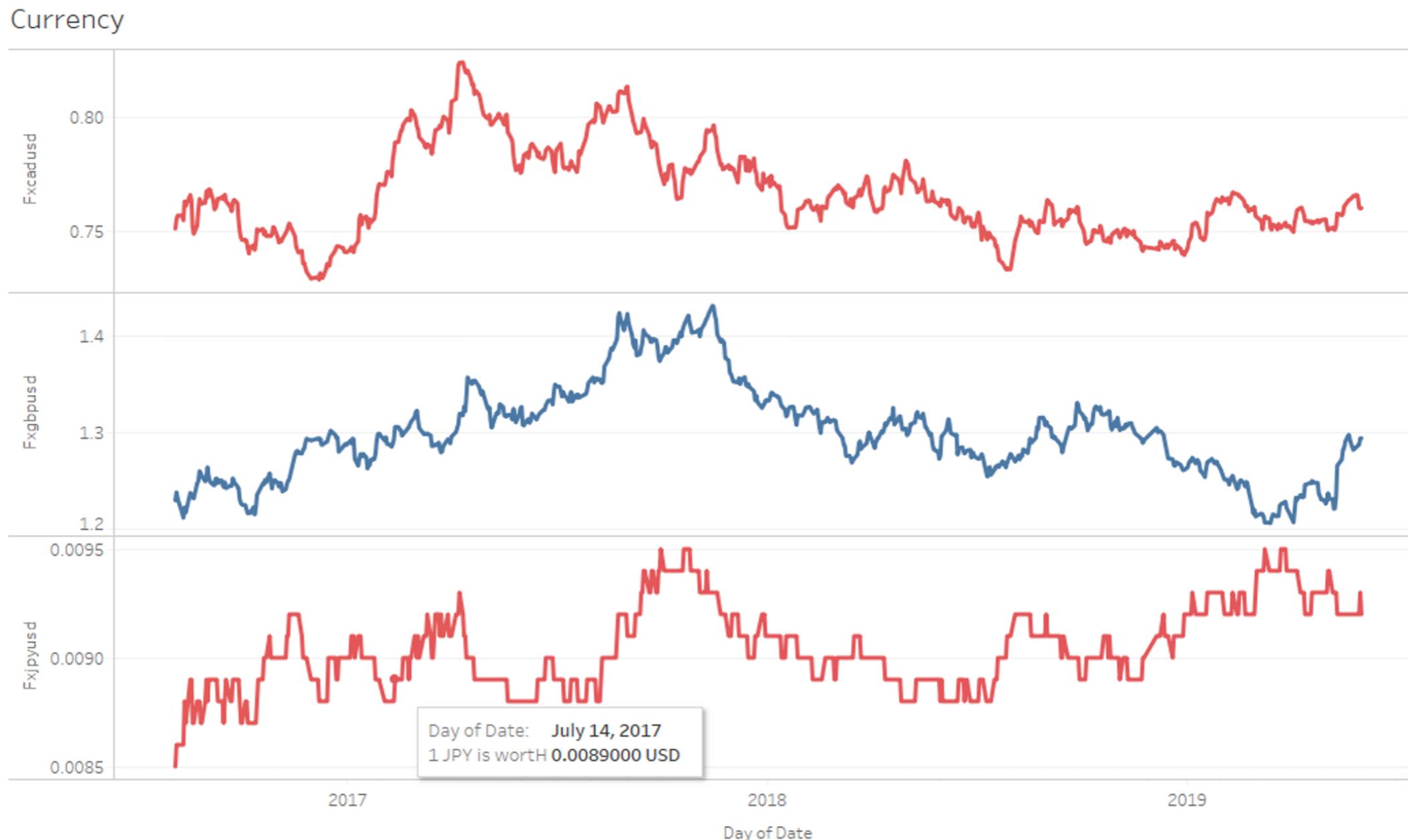
- TYO (JPY)



Monitor stock shares and stock price



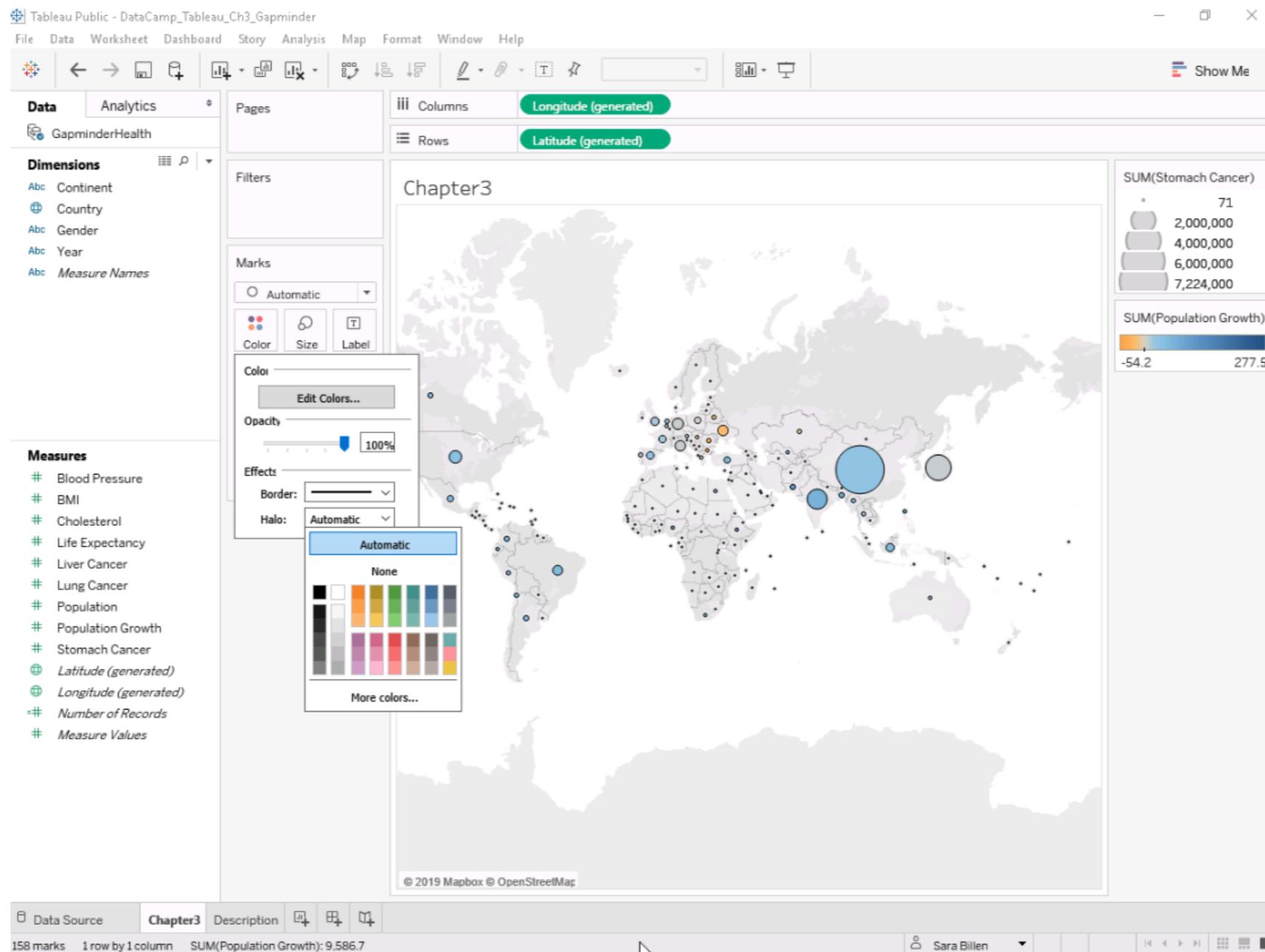
Monitor currency fluctuations



Tableau's workbook and sheet file structure

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

Worksheet



Dashboard

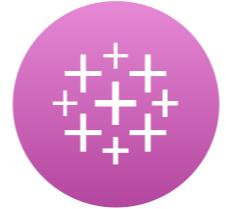
- A collection of several views
- Access dashboards from tabs at the bottom of a workbook
- Data in sheets and dashboards is connected
- Sheets and dashboards update with the latest available data from the data source(s)

Let's practice!

INTRODUCTION TO TABLEAU

Create a dashboard

INTRODUCTION TO TABLEAU



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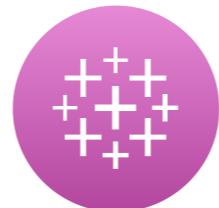
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Let's practice!

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Customize your dashboard

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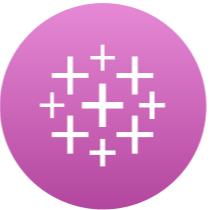
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Let's practice!

INTRODUCTION TO TABLEAU

Stories

INTRODUCTION TO TABLEAU



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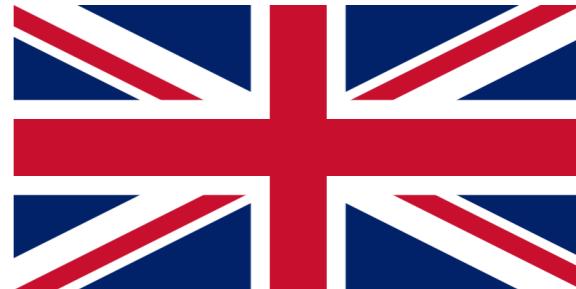
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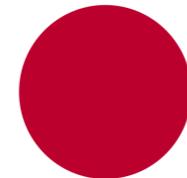
Tesco PLC (TSCO.L)

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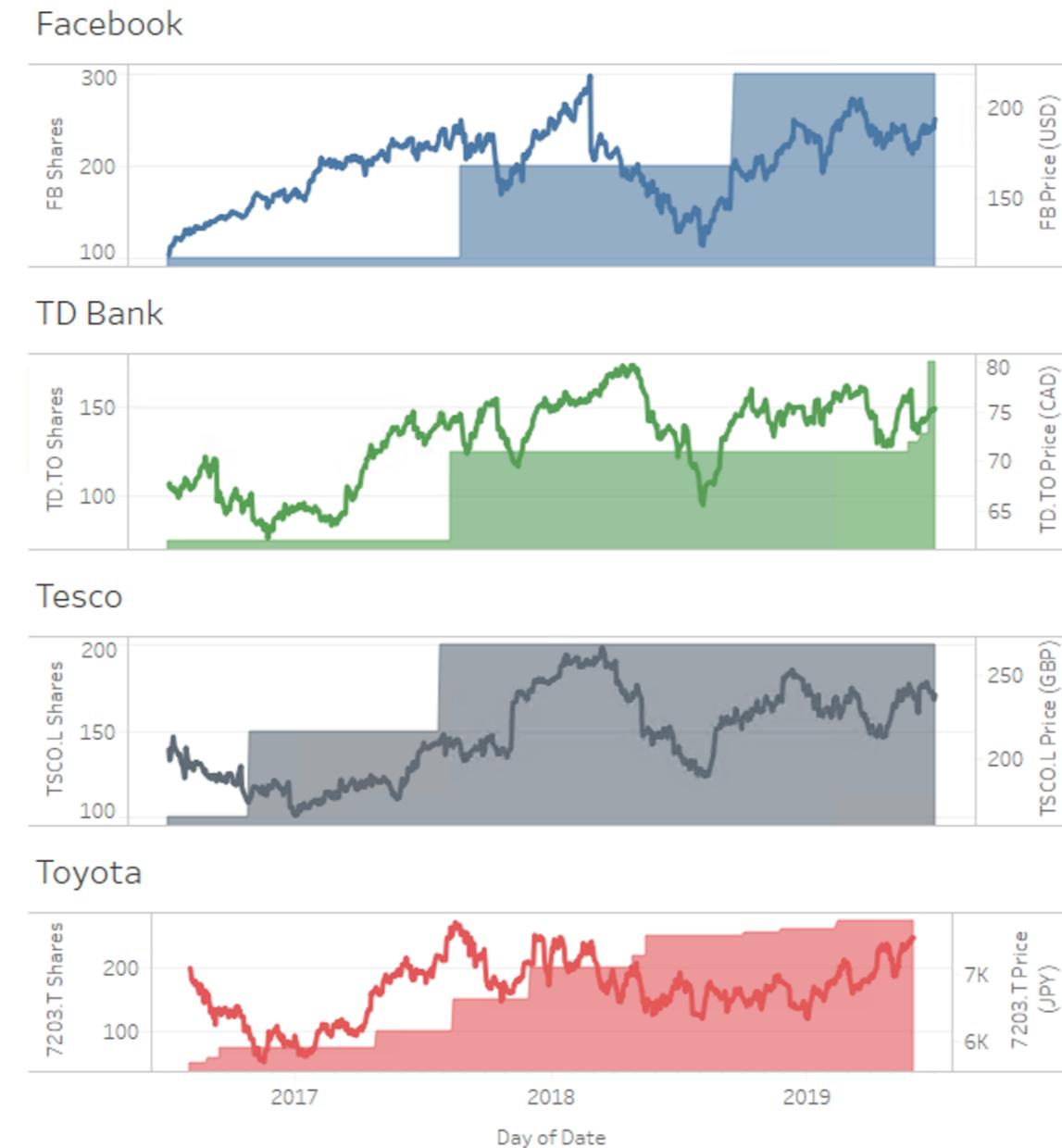


Toyota Motor Corporation (7203.T)

- TYO (JPY)



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

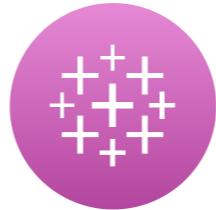


Let's practice!

INTRODUCTION TO TABLEAU

Create a story

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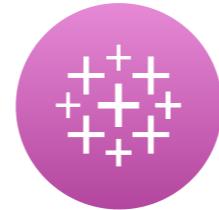
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Let's practice!

INTRODUCTION TO TABLEAU

Customize your story

INTRODUCTION TO TABLEAU



David Venturi

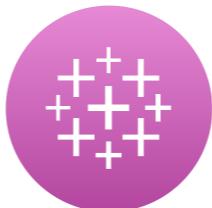
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INTRODUCTION TO TABLEAU

Save and share your work

INTRODUCTION TO TABLEAU



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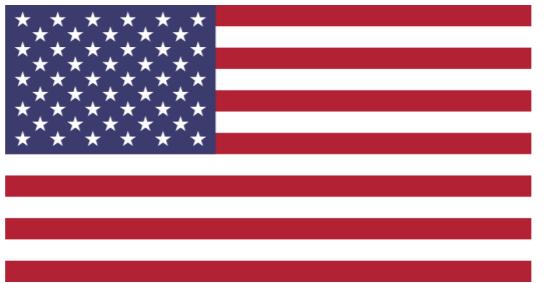
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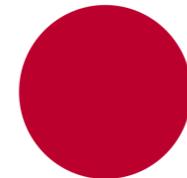
Tesco PLC (TSCO.L)

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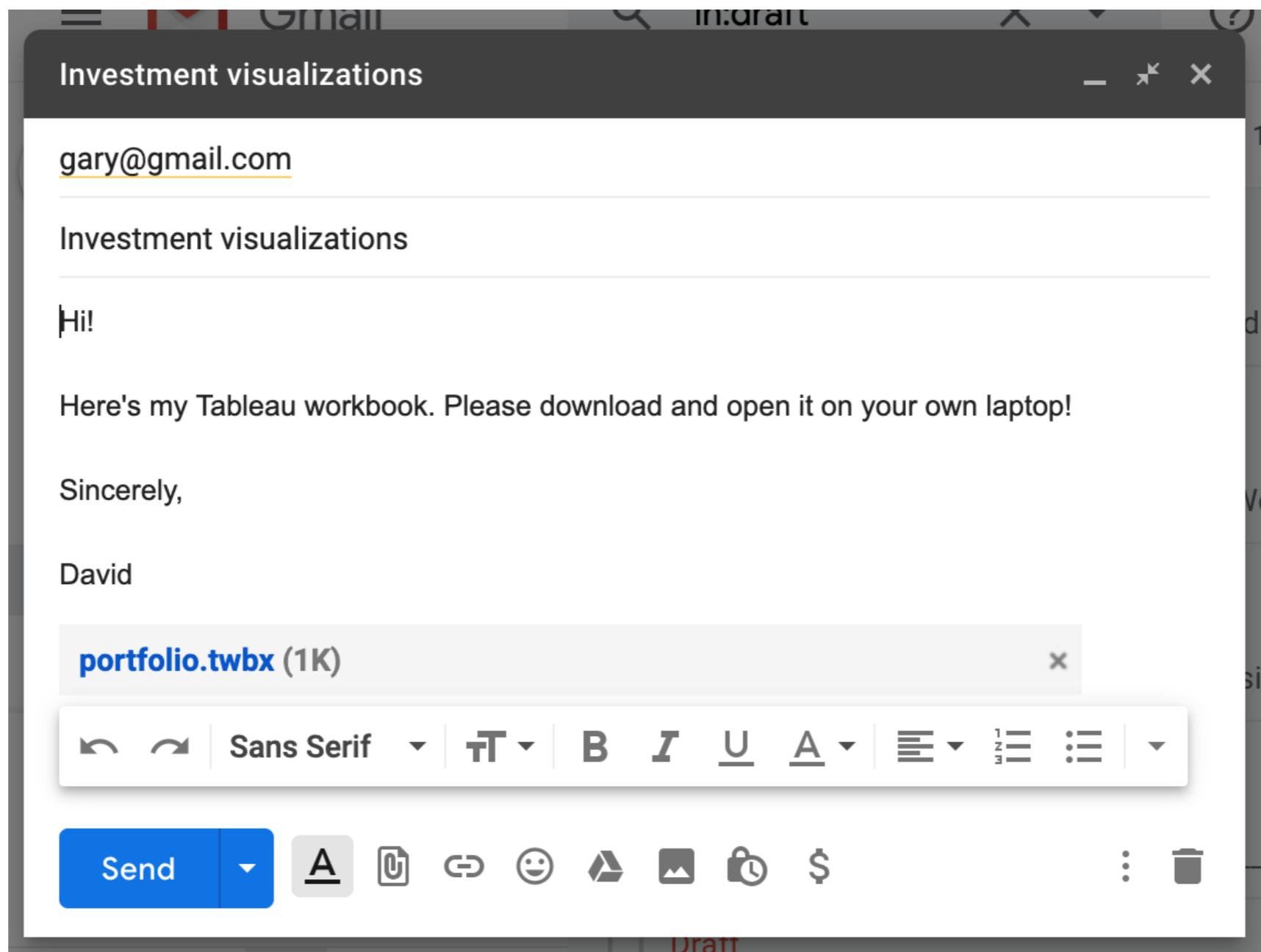
Save your work

- You can save your work at any time in Tableau
- For Tableau Desktop, many ways to save your work:
 - Autosave a workbook
 - Save a workbook
 - Save a packaged workbook
 - Save a bookmark
 - Export to another file type
 - Image (BMP or TIFF)
 - PDF
 - PowerPoint

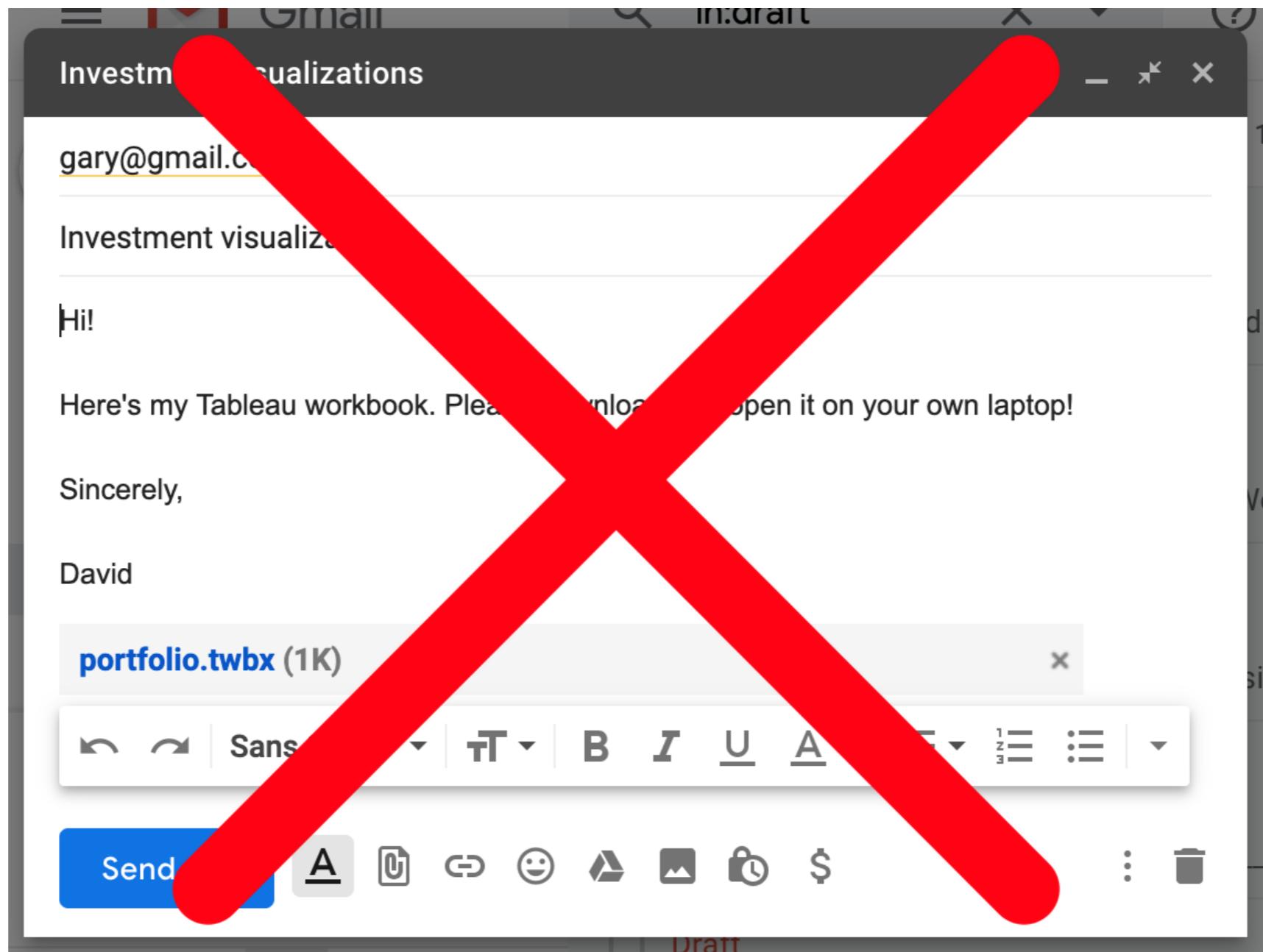
File extensions

- Save a workbook
 - .twb
- Save a packaged workbook
 - .twbx
- Save a bookmark
 - .tmb

Share your work



Share your work



Share your work

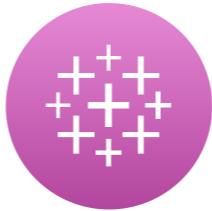
- Share with **Tableau Public**
 - Anyone on the internet
 - Free
- Share with **Tableau Server**
 - People within your organization
 - Paid

Let's practice!

INTRODUCTION TO TABLEAU

Save your work

INTRODUCTION TO TABLEAU



David Venturi

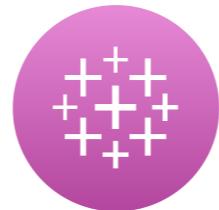
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Let's practice!

INTRODUCTION TO TABLEAU

Share your work

INTRODUCTION TO TABLEAU



David Venturi

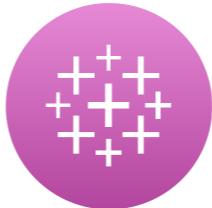
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Let's practice!

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Congratulations!

INTRODUCTION TO TABLEAU

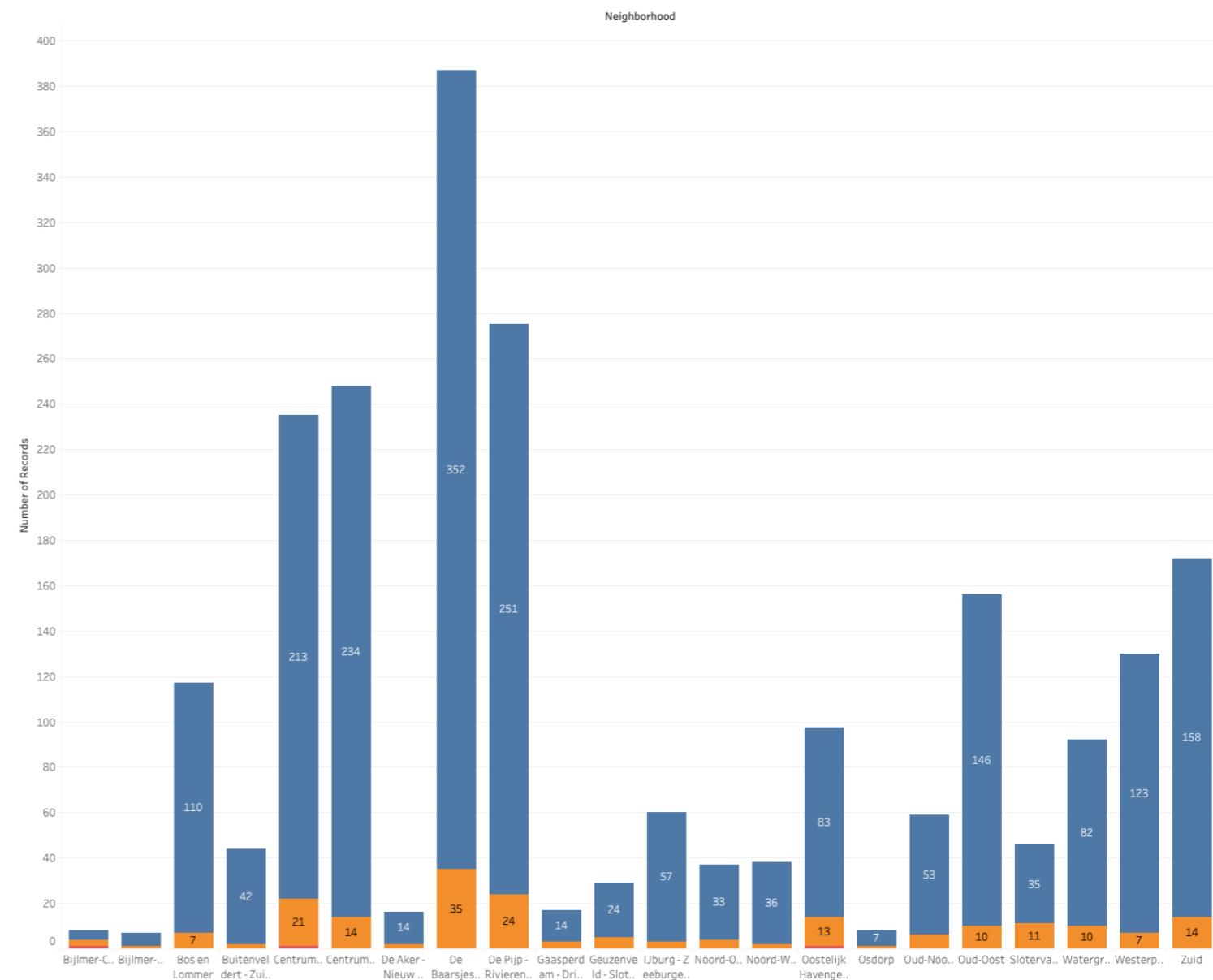


Hadrien Lacroix

Content Developer, DataCamp

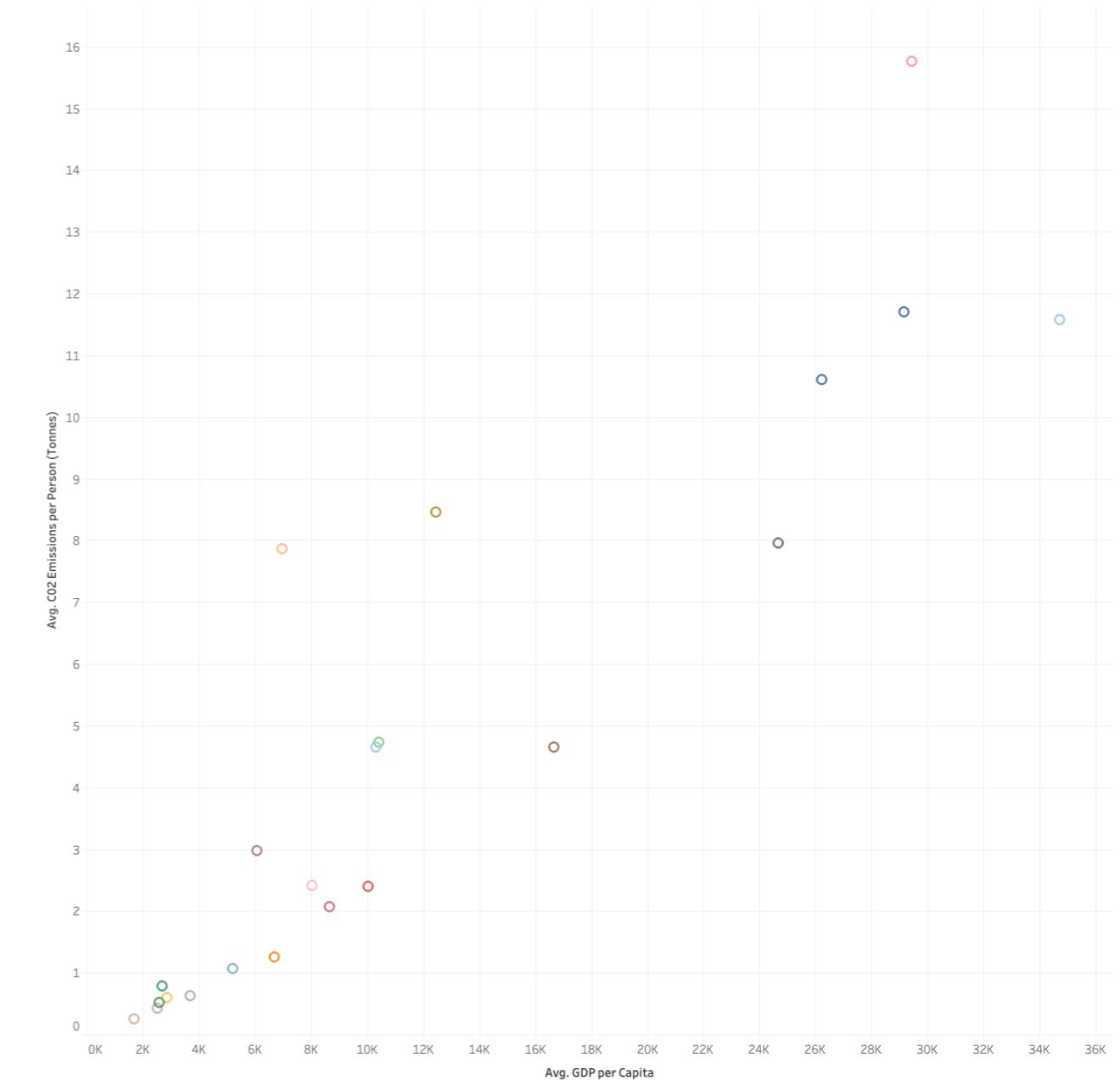
Getting started with Tableau

- Load data and workbooks
- Navigate Tableau
- First visualizations



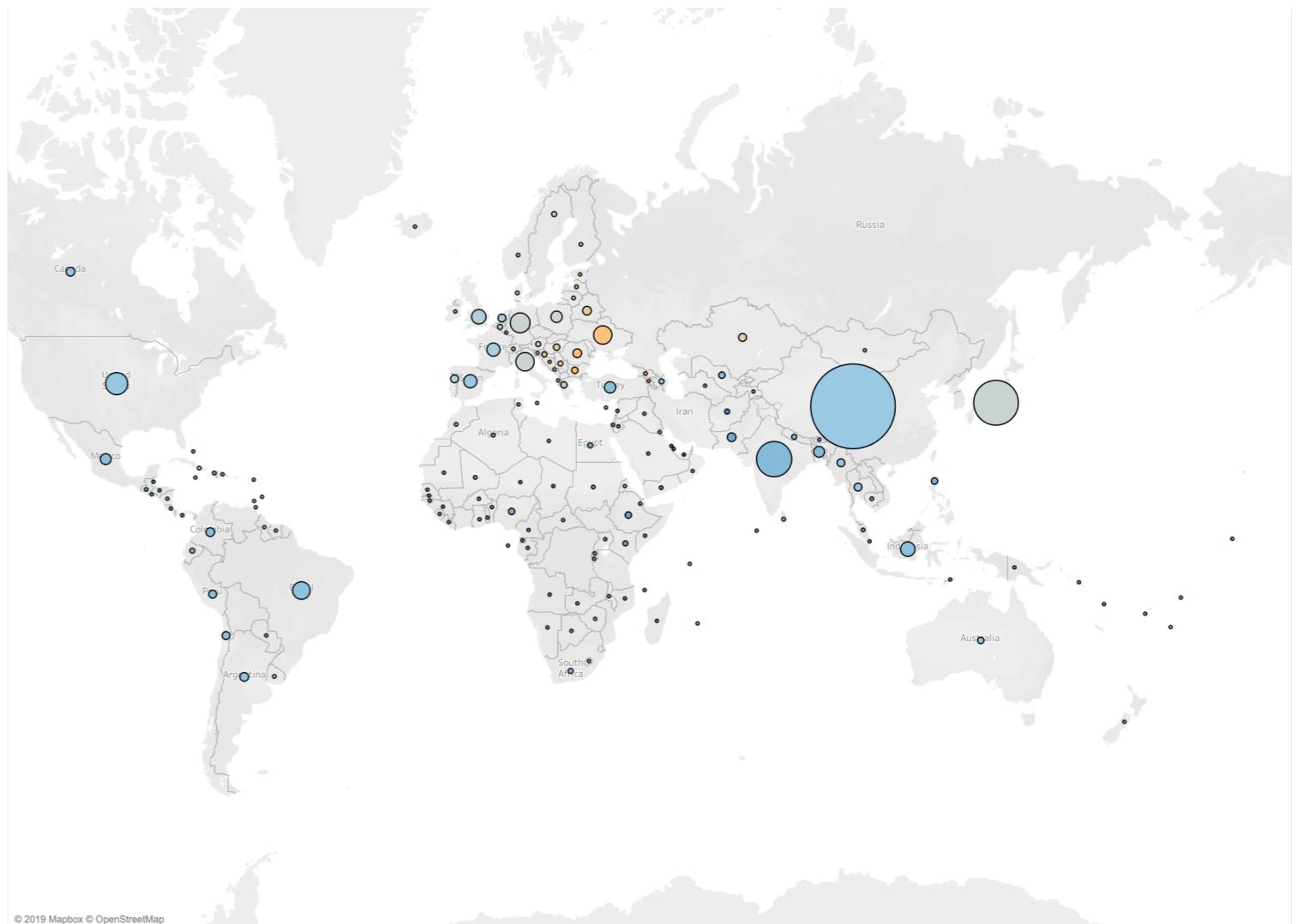
Building and customizing visualizations

- Sorting and filtering
- Aggregation
- Calculated fields



Digging deeper

- Map geographic data
- Apply quick table calculations
- Work with dates
- Reference lines, trend lines, and forecasting



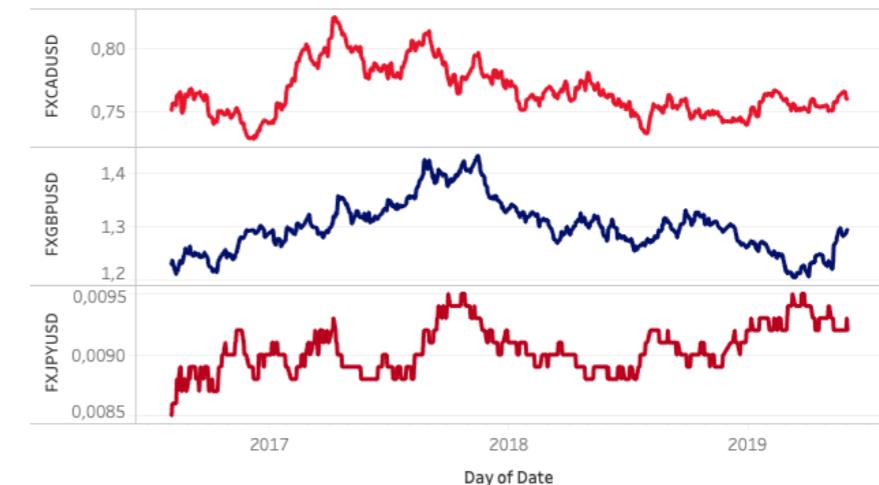
Presenting your data

- Improve and format your visualizations
- Convey findings with Dashboards and Stories
- Save and share your work locally and publicly

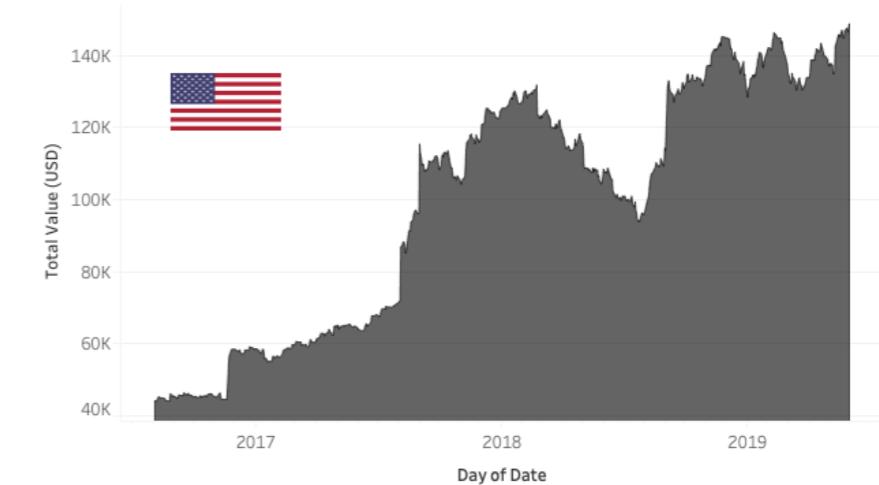
My Portfolio



The currencies of my portfolio

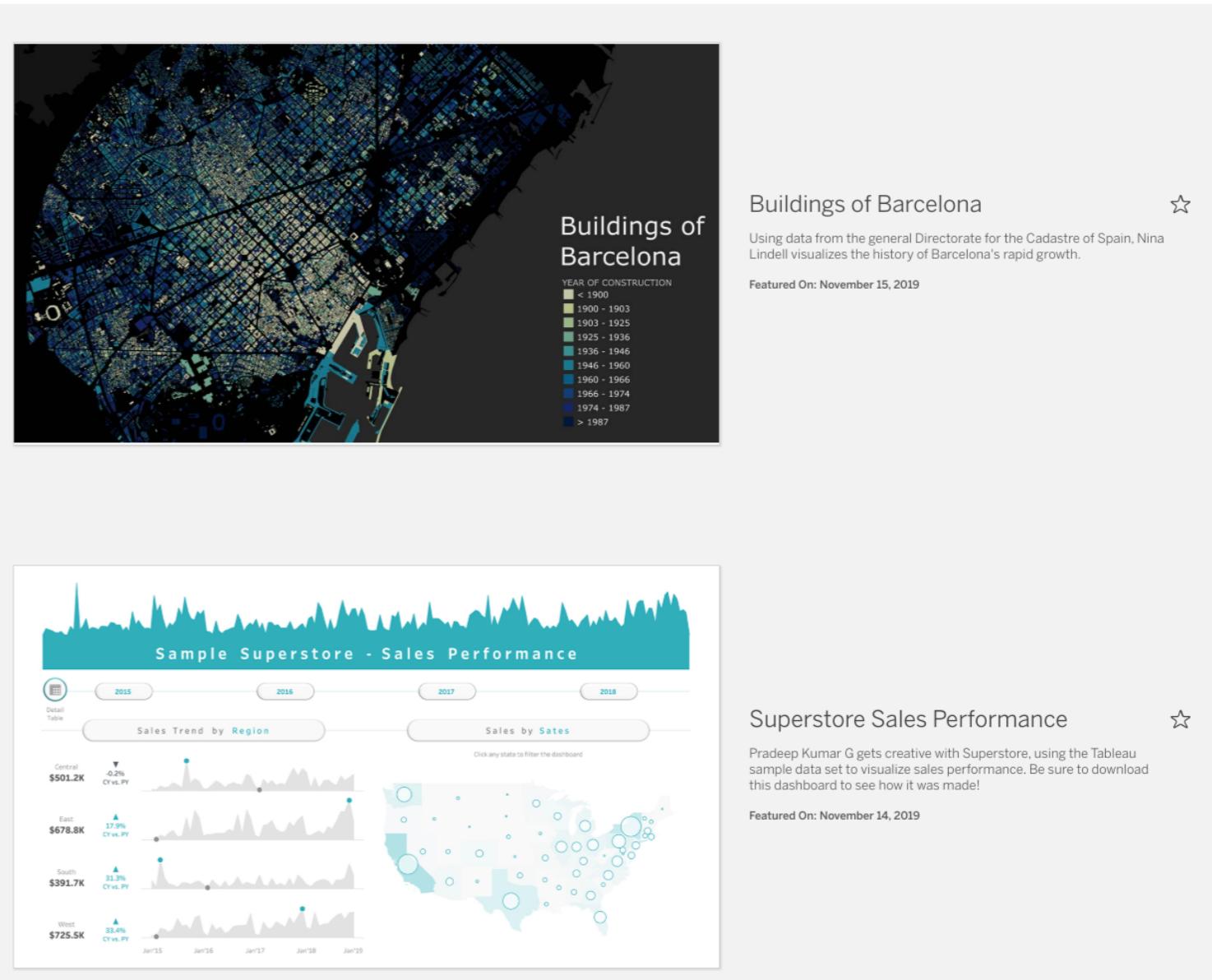


The value of my portfolio in USD



It's just the beginning

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



Let's practice!

INTRODUCTION TO TABLEAU