PROGRAM 4: Dashboard Design and Storytelling – Components of Dashboard, Understanding how to place worksheets in Containers, Action filters and its types.

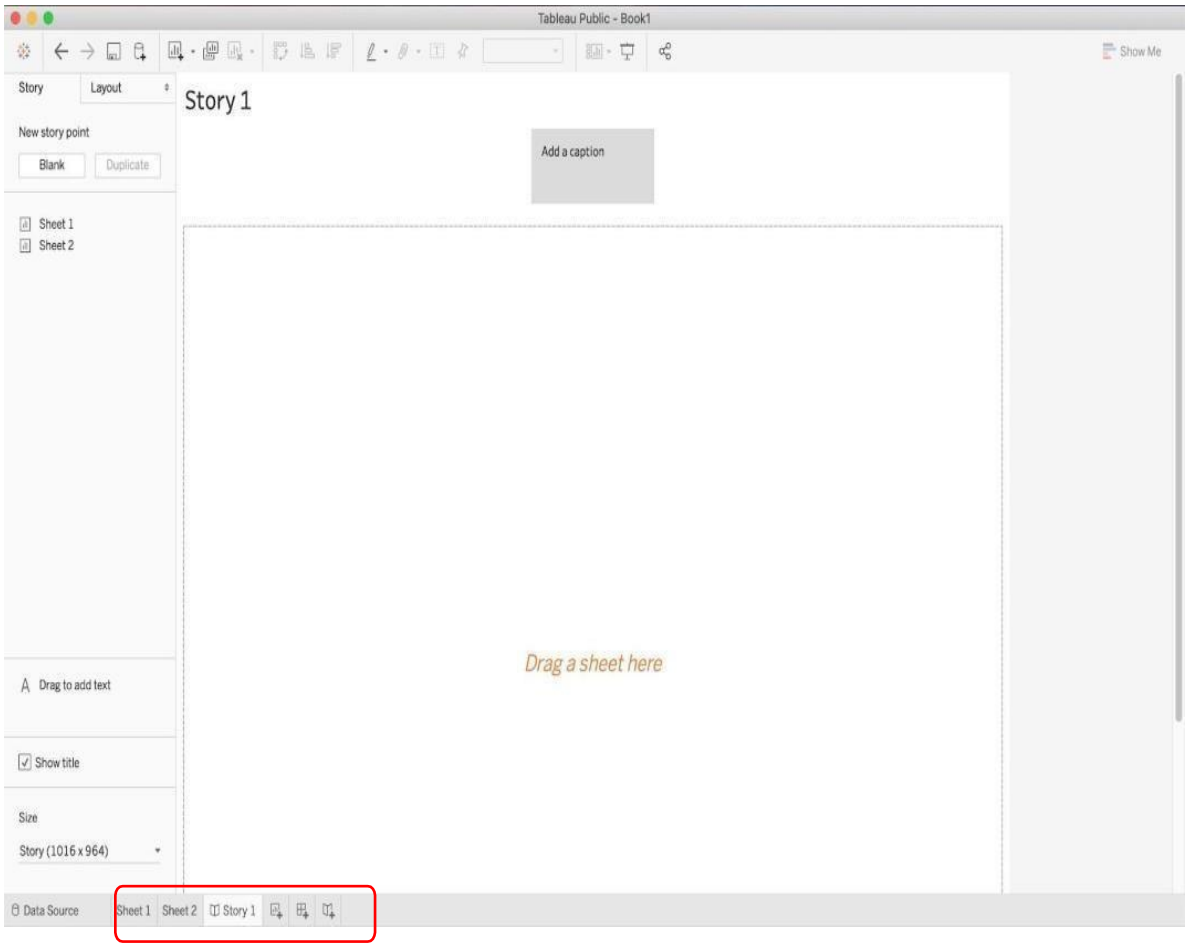
CREATING A STORY WITH TABLEAU PUBLIC

With Tableau public, you are able to organize your data in order to tell a meaningful story. This is beneficial when you are doing a presentation, creating an article, or uploading to a website, as it helps your audience understand your data.

Stories are created through assembling the different worksheets and dashboards. We can highlight important data points, add text box and pictures to help convey our story. However, there are many different ways to tell a story. For example, one technique is called "tailoring in" where the story starts with a big picture view and zooms in on a specific detail.

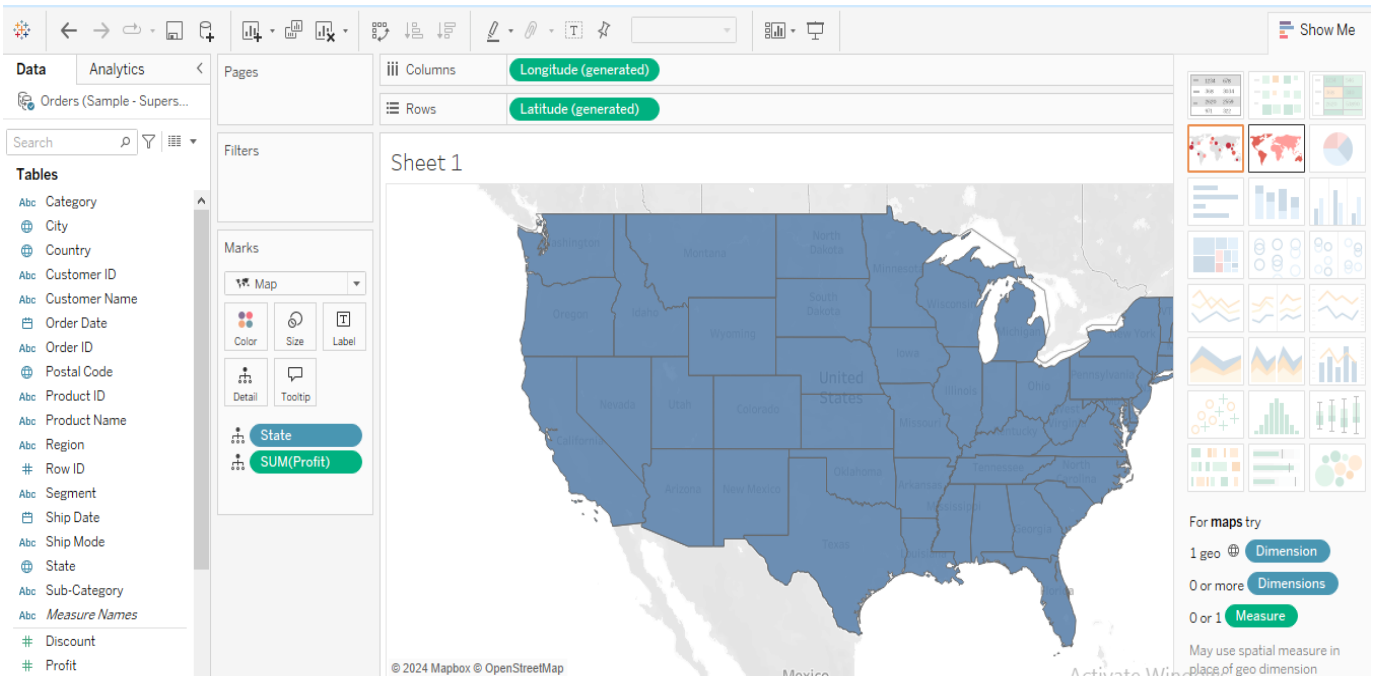
In contrast, a story can also be told by starting with a case and zooming out to that big picture view. We are going to return to our health expenditure worksheets to create a tailoring in story and illustrate the changes in Canada's spending in a meaningful way.

To begin, select "New Story" at the bottom right of your screen.



Step 1: Creating Sheets: Sheet 1

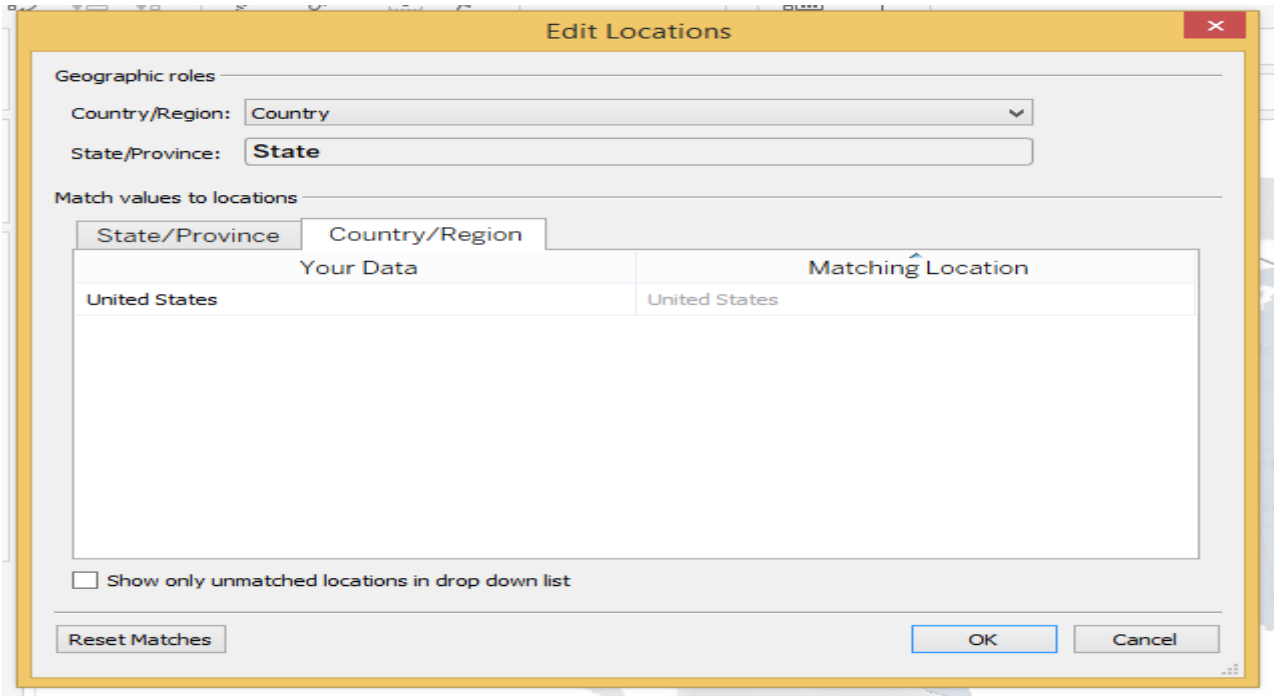
1. Select "**Profit**" and "**State**" and hit **Show Me** select field **Maps**



2. Right click on Map and select **"Edit Locations"**

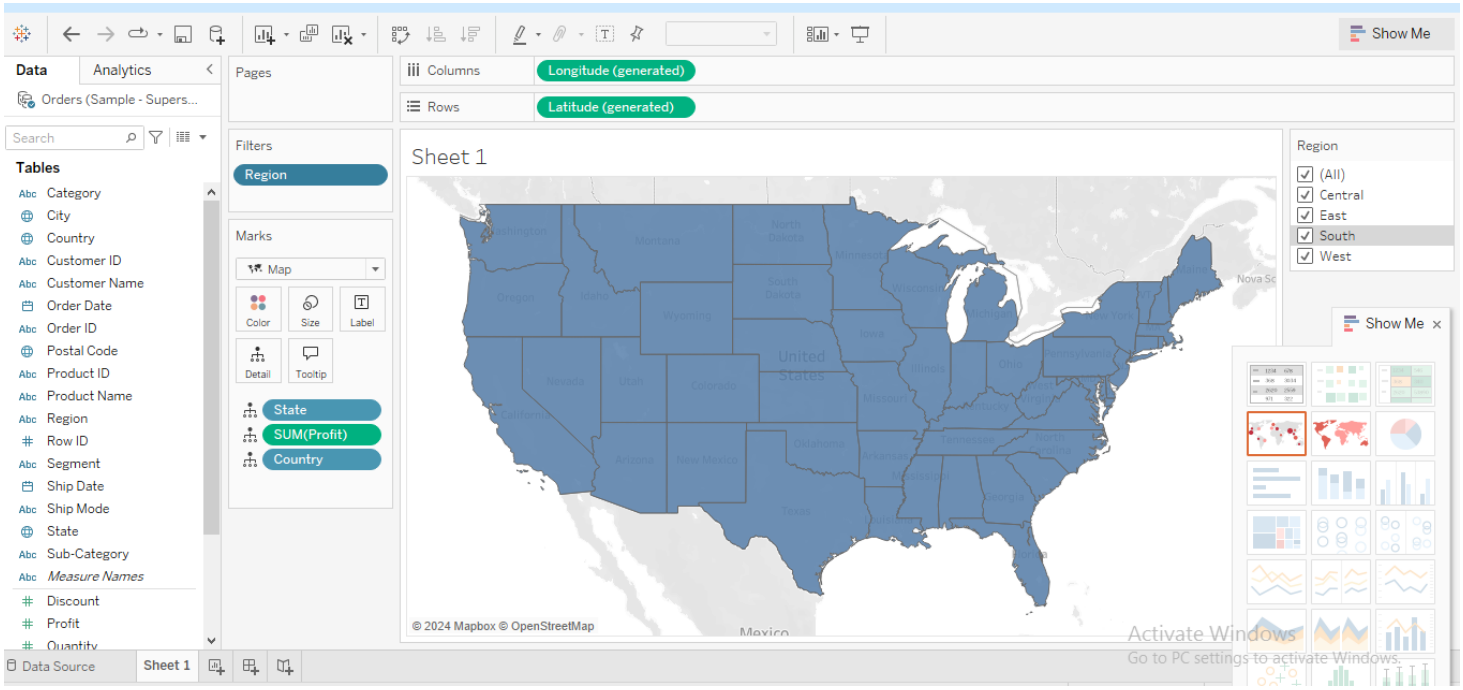
   Goto Country/region select **from field ,** we have United States.

   We selected States because State is Geospatial, and Region is a string variable. If we use Region and Profit , it won't show map it shows Bar chart.

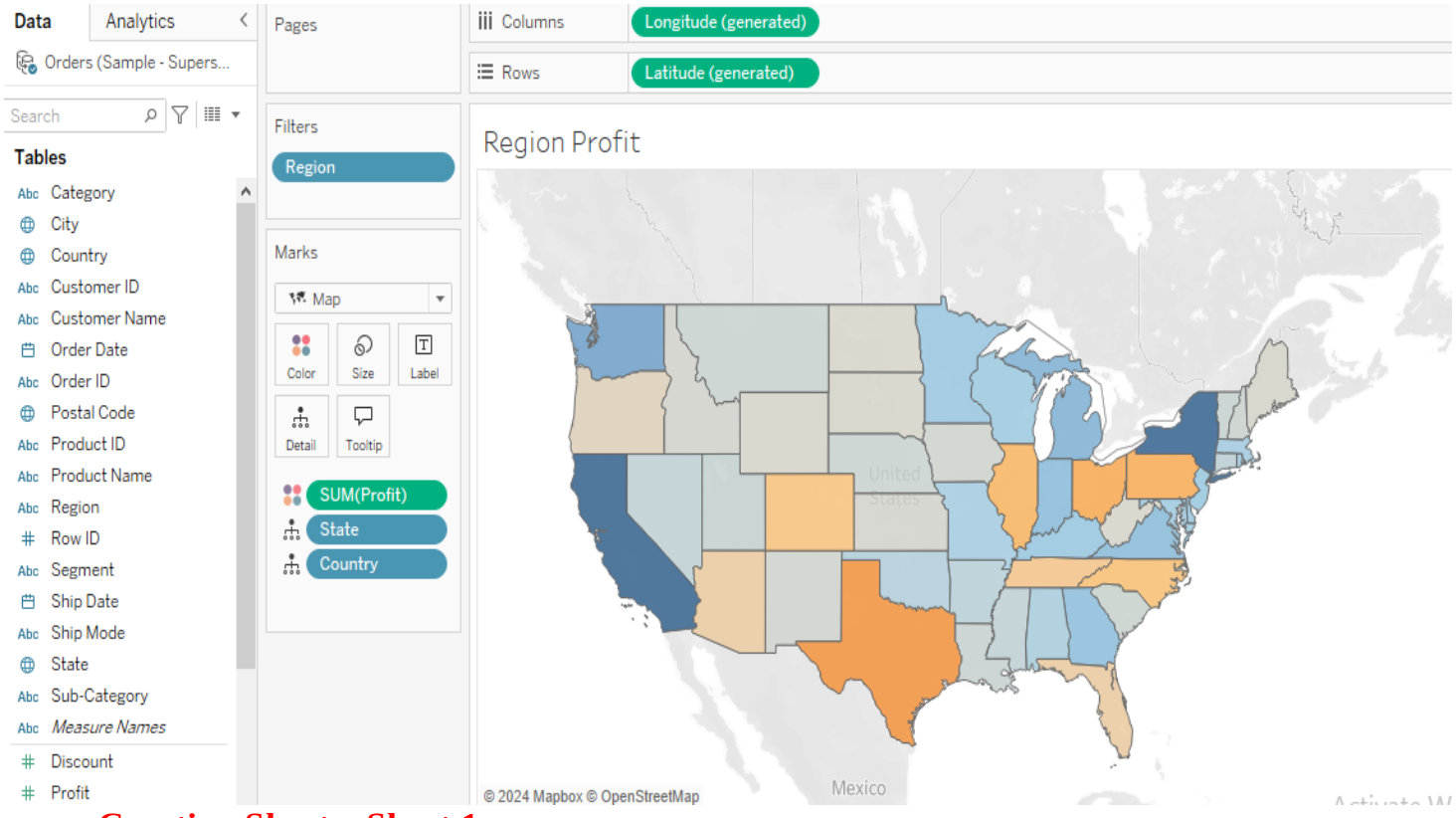


3. Drag and drop **Region** into Filters. Select **Use all ,** Click on **Apply** and **Ok.**

   Click on Region Dropdown and click on **Show Filter.**

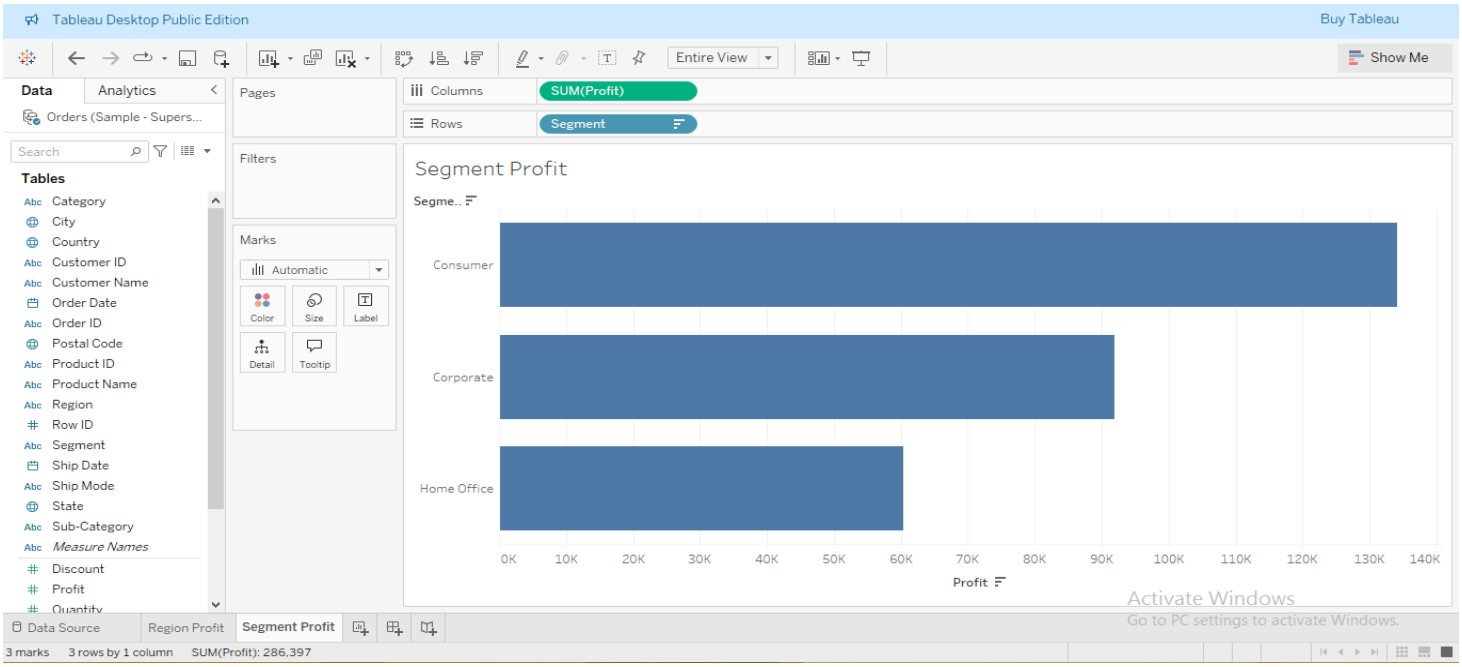


4. Now Rename **Sheet 1** to **Region Profit**

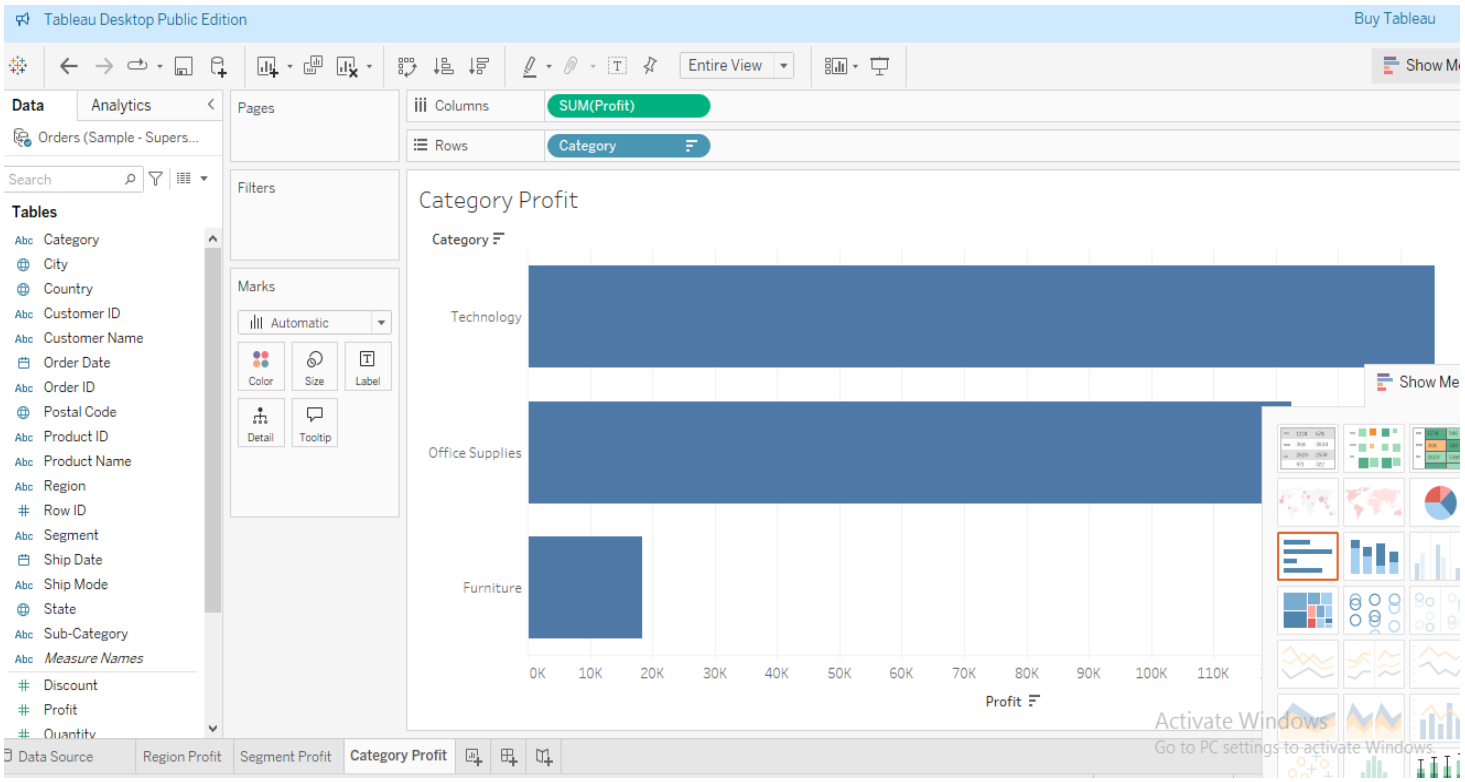


- **Creating Sheets: Sheet 1**

- **Creating Sheets: Sheet 2**
  1. Drag and drop **Profit** to Columns and **Segment** to Rows.
  2. Select Top and Bottom & Entire View
  3. Rename Sheet 2 to **Segment Profit.**

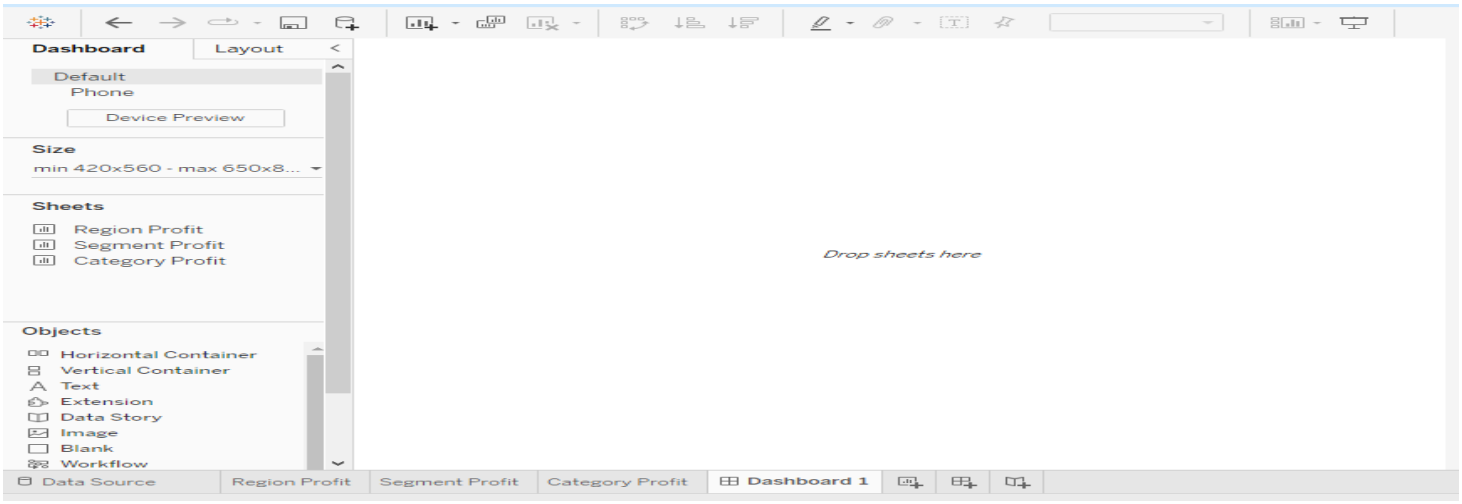


- **Creating Sheets: Sheet 2**
  1. Drag and drop **Profit** to Columns and **Category** to Rows.
  2. Select Top and Bottom(High to low) & Entire View
  3. Rename Sheet 3 to **Category Profit**



Step 2: Now get all 3 sheets to Dashboard

1. **Click on New dashboard, we can see all 3 sheets created in step 1.**

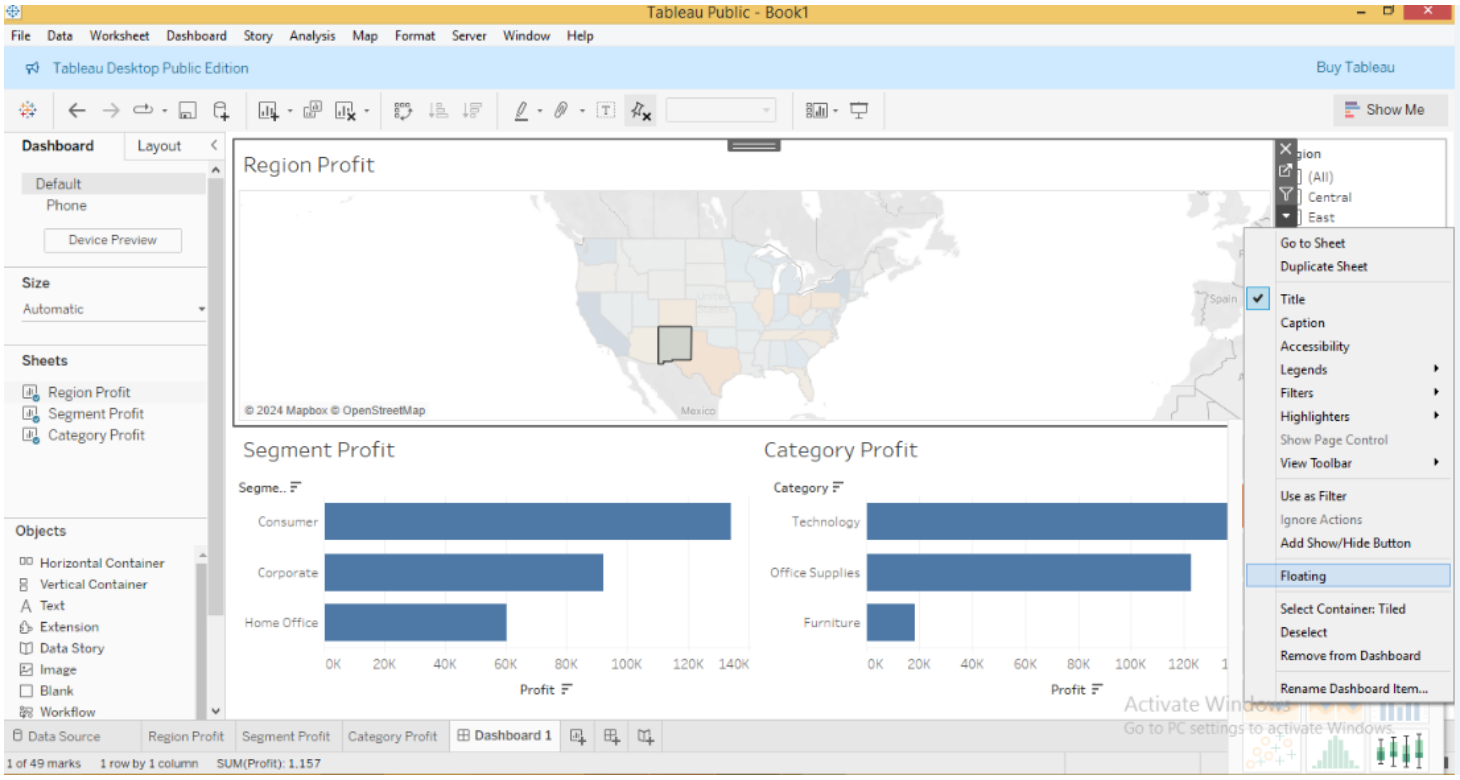


2. Fix view by clicking **Size** and then **Automatic.**

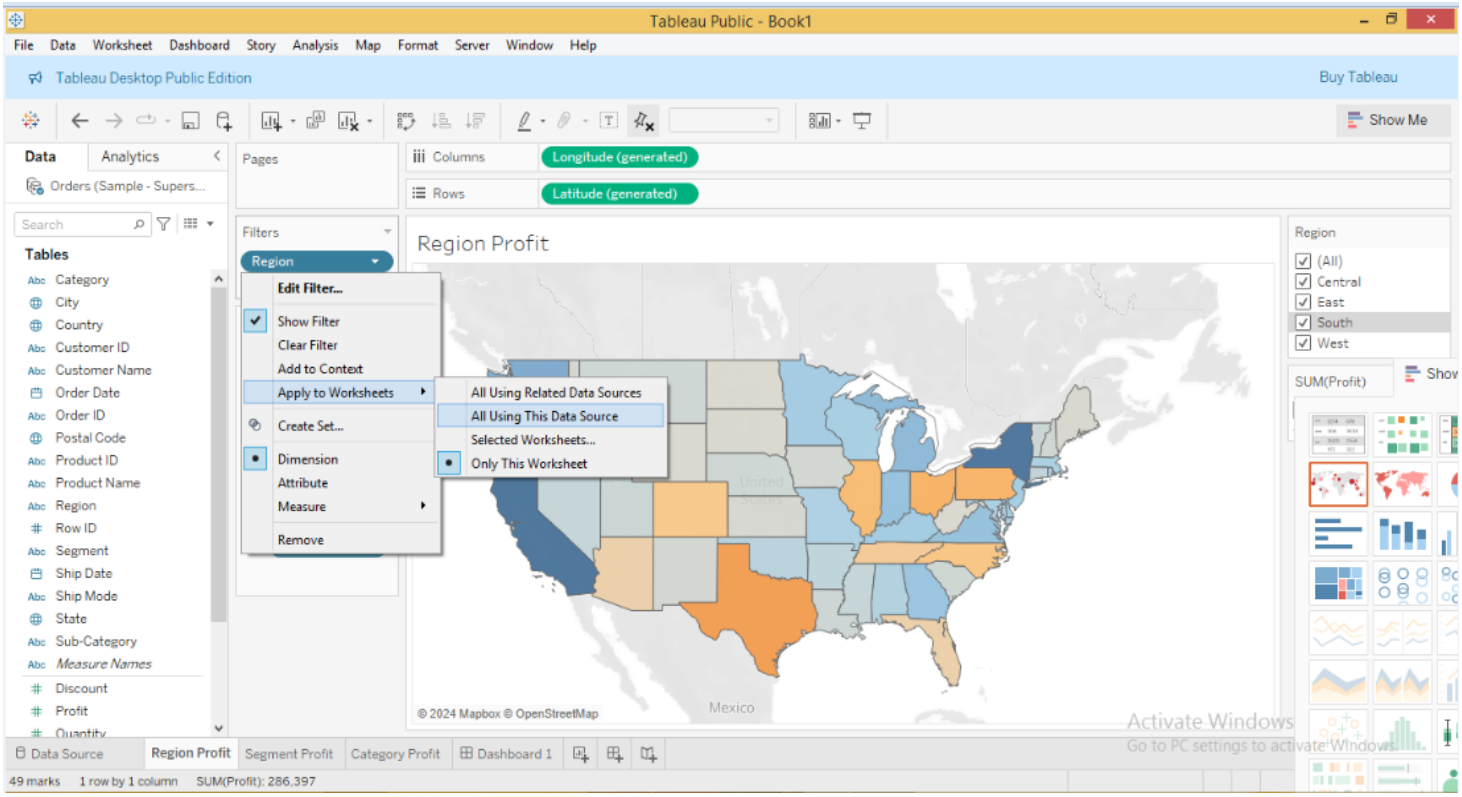
3. Drag **Region Profit** first

4. Drag **Segment Profit** below **Region Profit** and then **Category Profit** right next to **Segment Profit.**

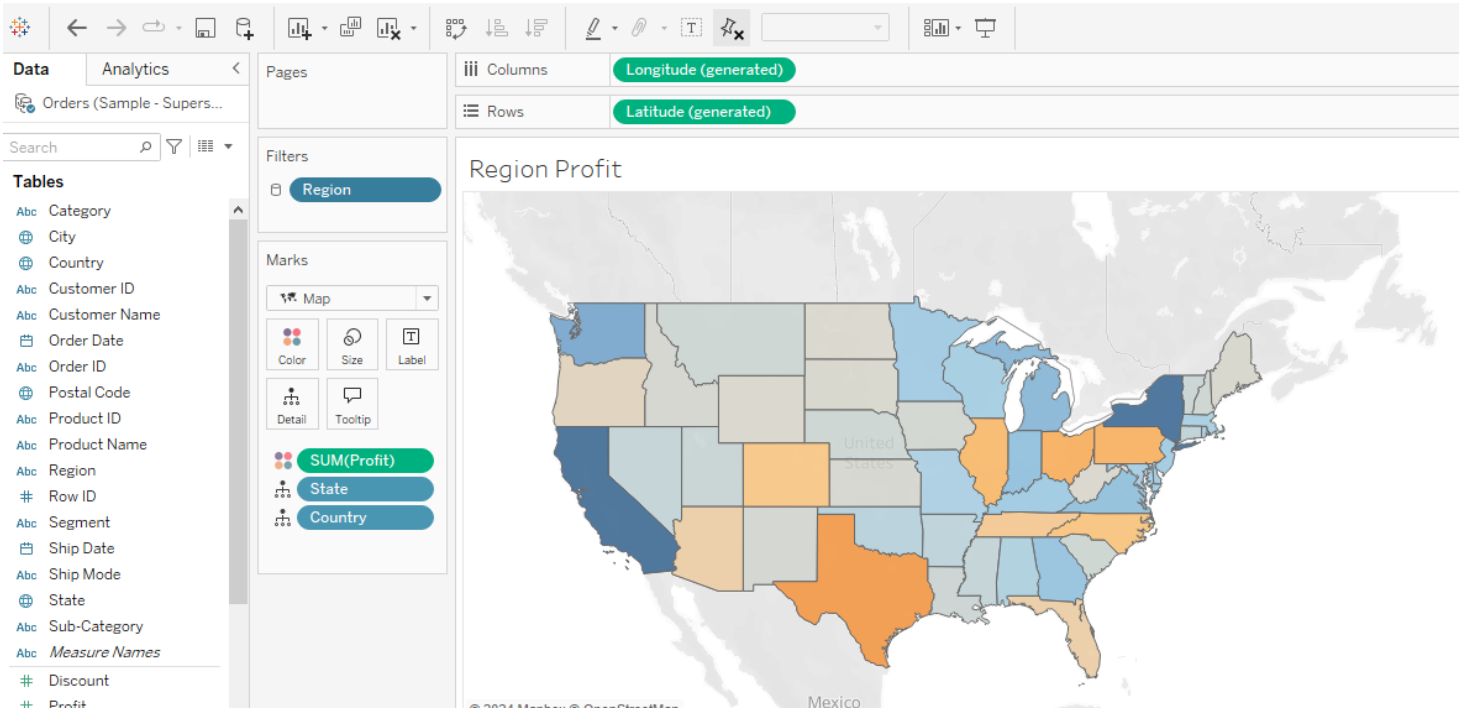
5. Click on more options and click on **Floating.**



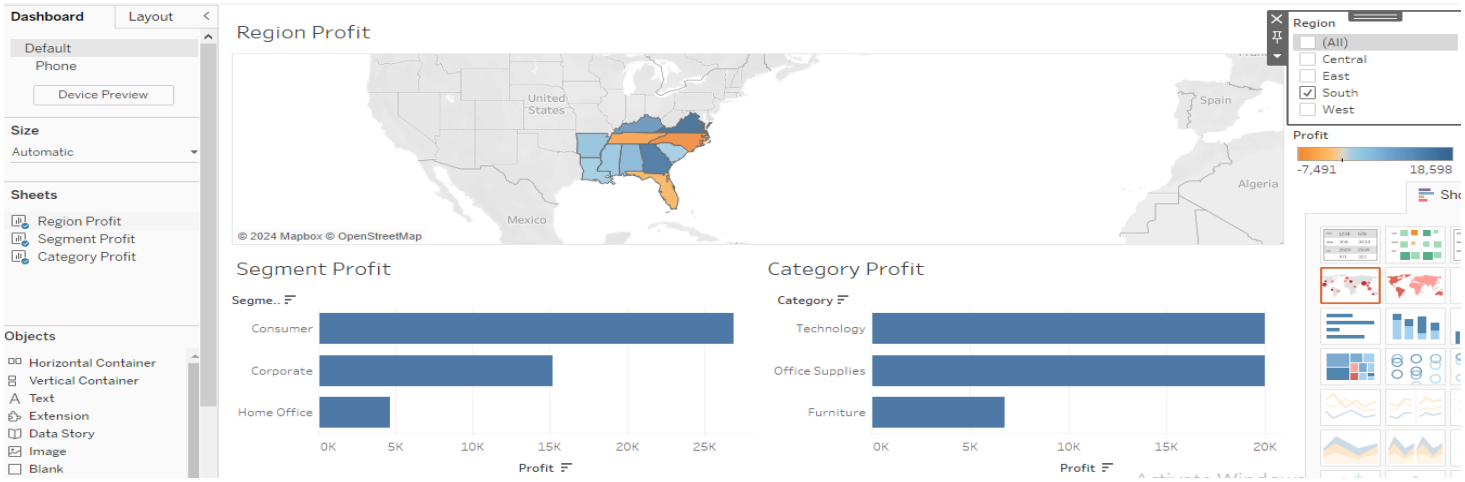
3. When Filtering, Region Profit Filter is working well. But Segment Profit and Category Profit visualization are not moving, they are static.
4. Because Filter option is applied to only Region Profit Sheet
5. To apply Filter option to all the sheets at the same time:
   Goto Region Profit Sheet, right click on **Region** Select **Apply to Worksheets** and then select **All Using This Data Source.**



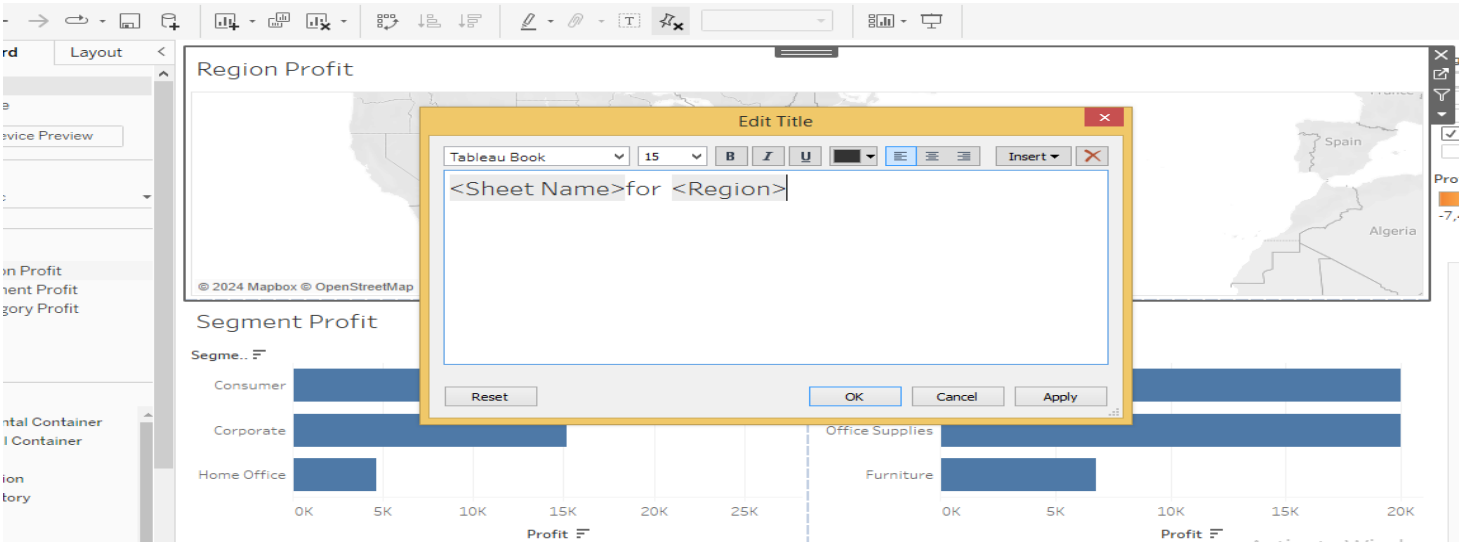
Now we can see Cylinder icon is poped up. This means Filter is used across the worksheets.

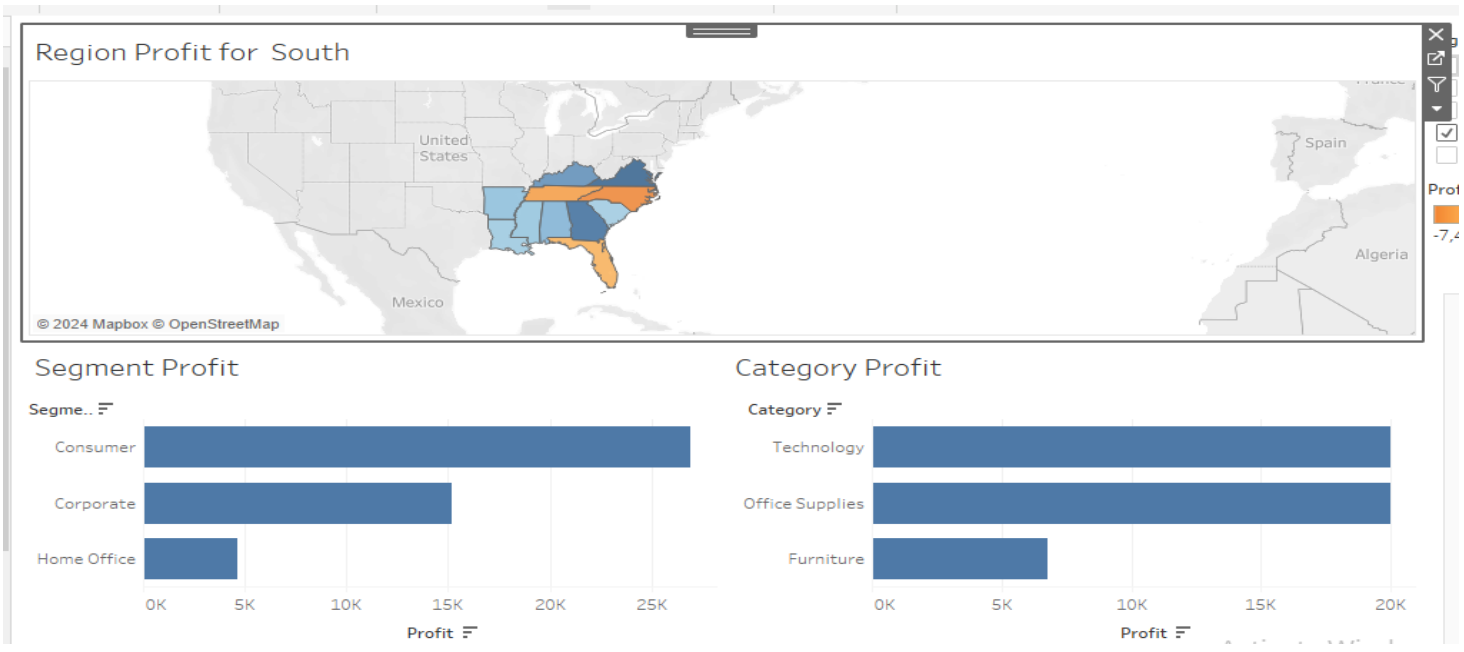


Now check Filter option is working in dashboard.

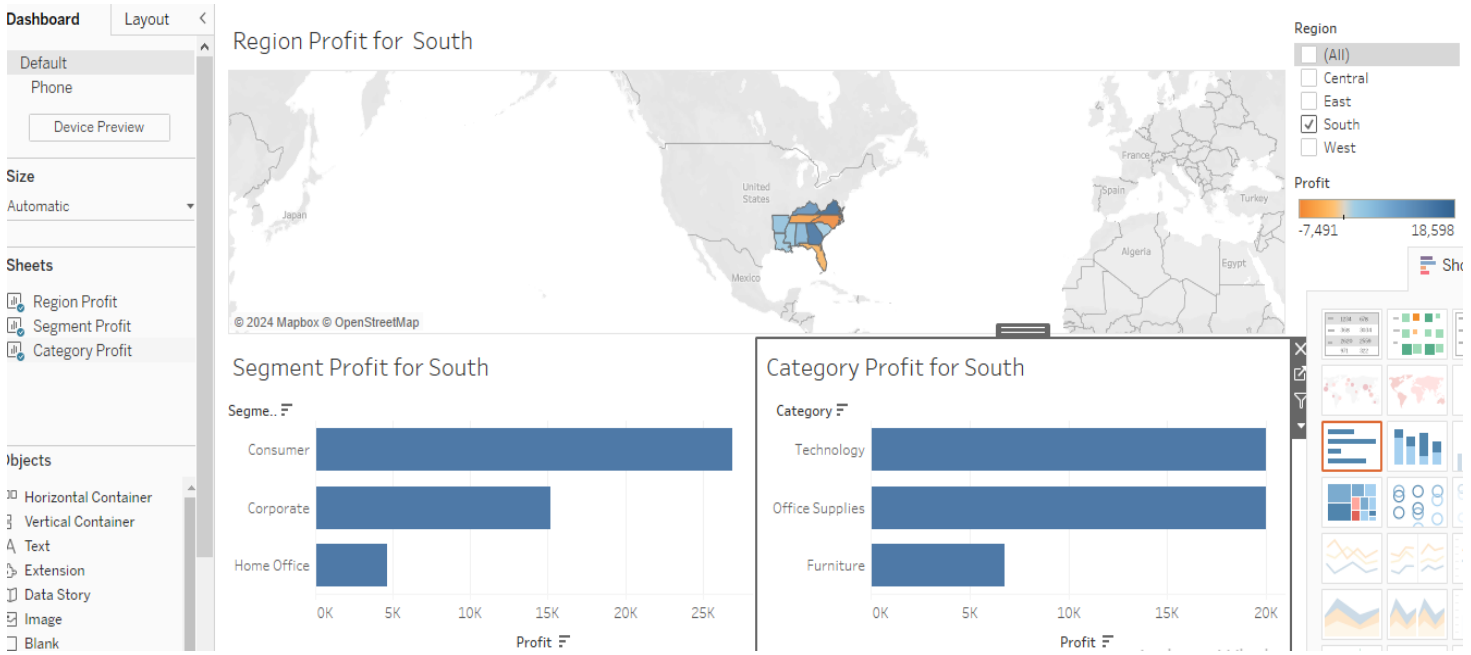


6. To display Region name in Region Profit Title, Double click on region Profit and include Region.



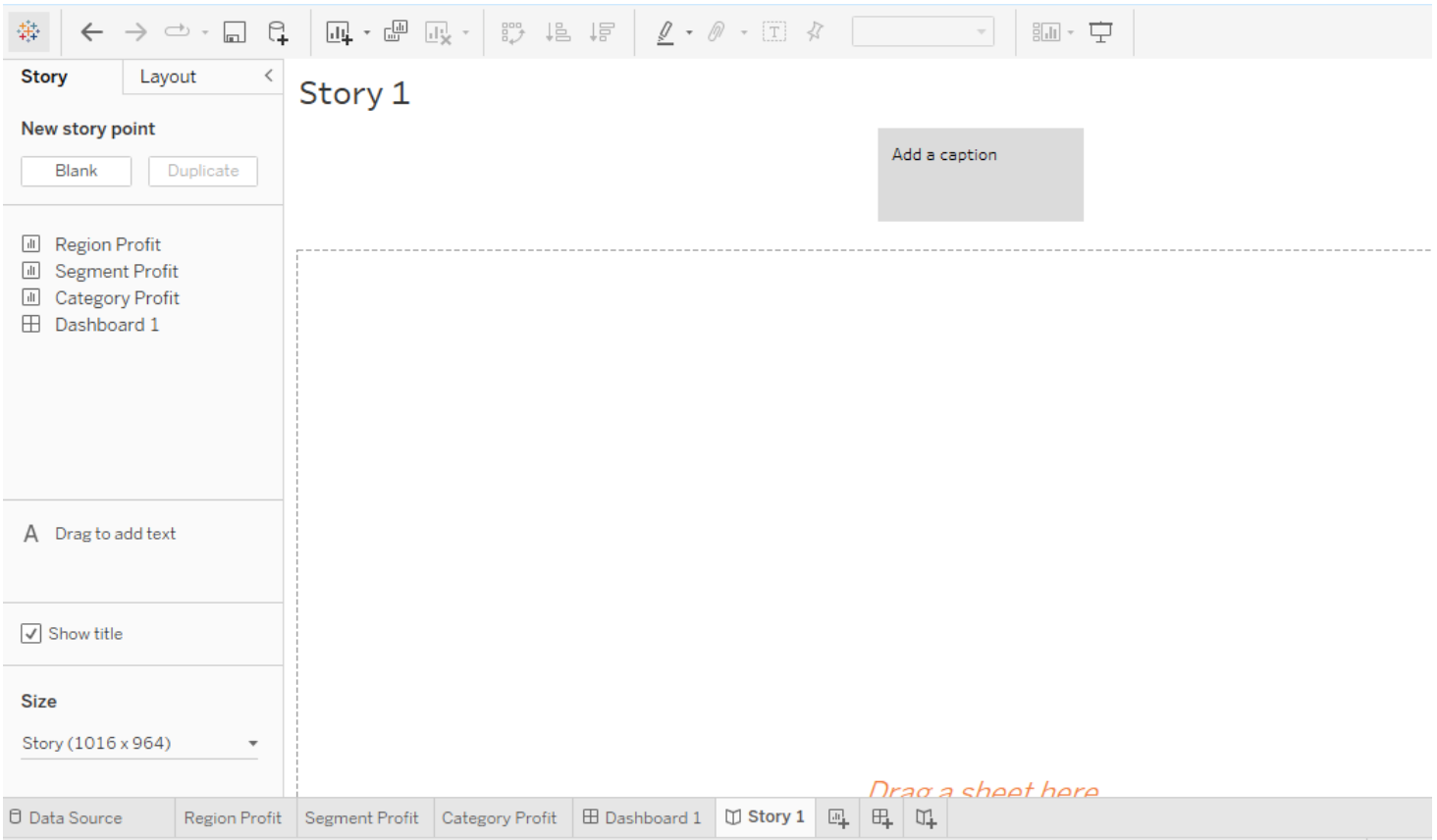


7. Similarly display Region name in Segment Profit and Category Profit Title

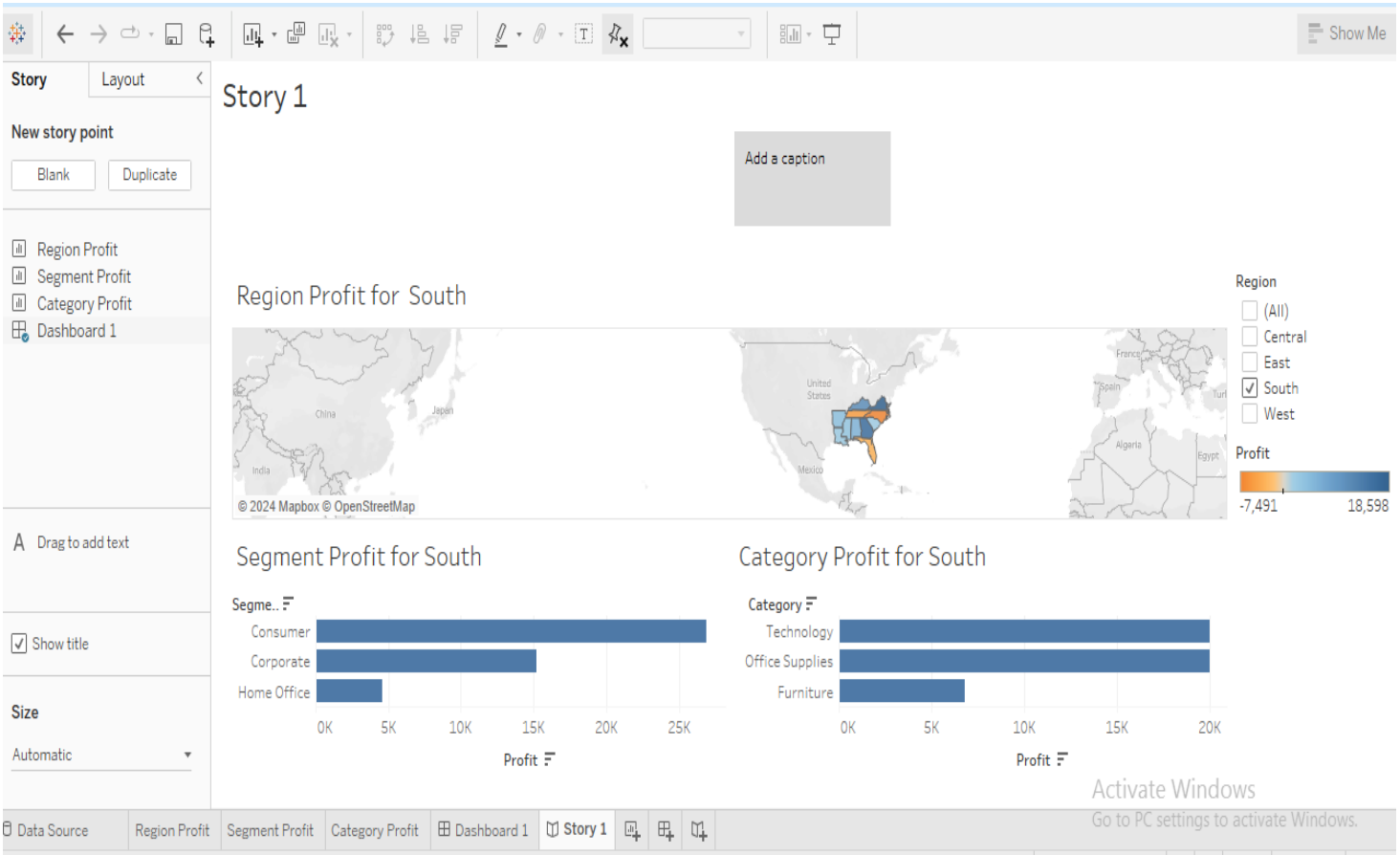


Step 3: To create Story

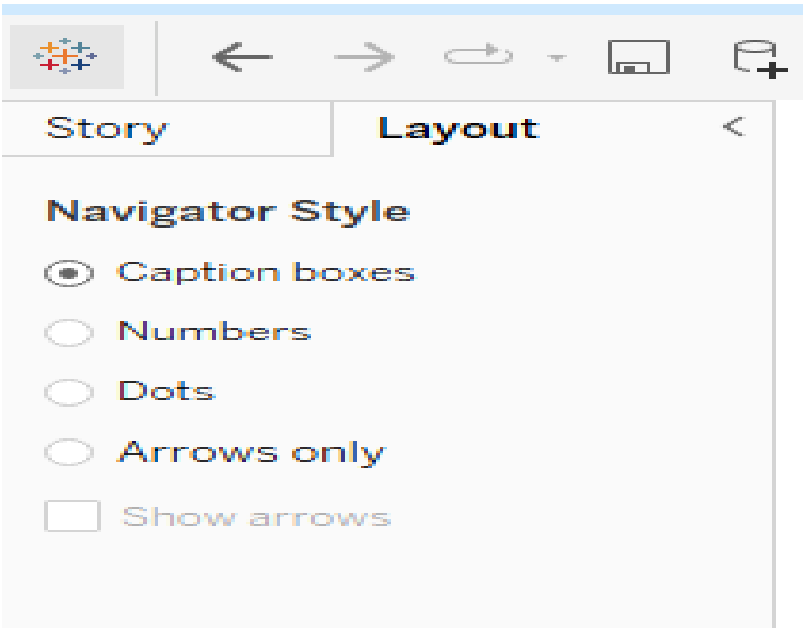
1. We can see 3 Worksheets and 1 Dashboard which we created in step 1 and 2.



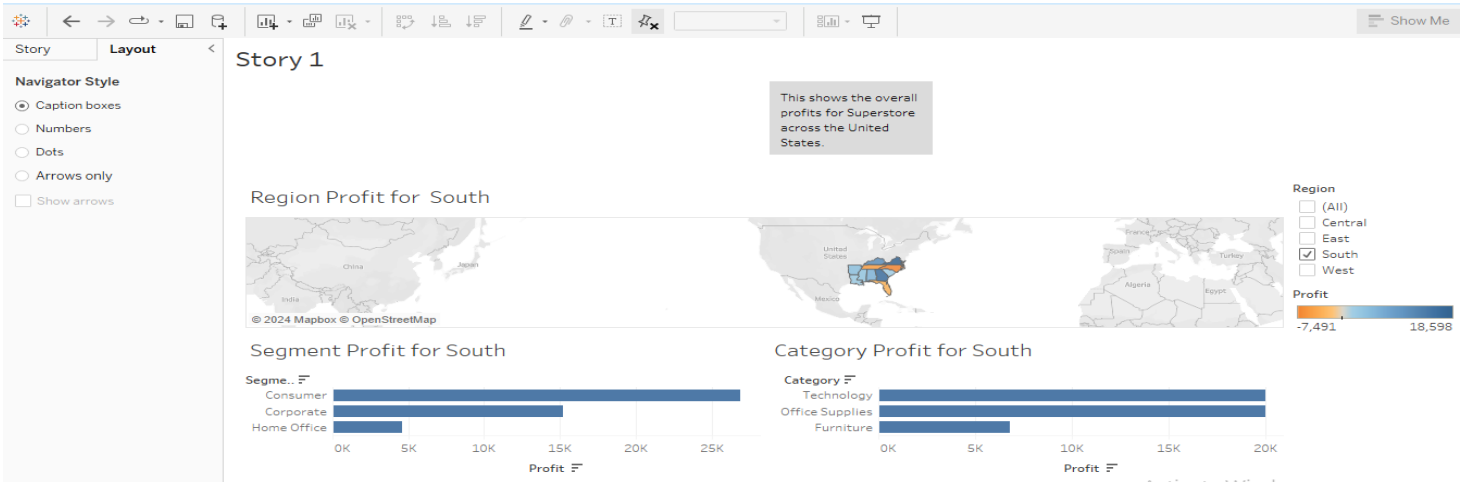
2. Fix view by clicking **Size** and then **Automatic,** which is at the bottom left.
3. Drag and drop **Dashboard 1** into the space.
4. We can only put one visualization at a time. If we add Region Profit automatically dashboard 1 will be replaced by Region Profit Sheet.



5. We can see 2 tabs **Story** and **Layout.** In **Layout** we have **Navigation Style**

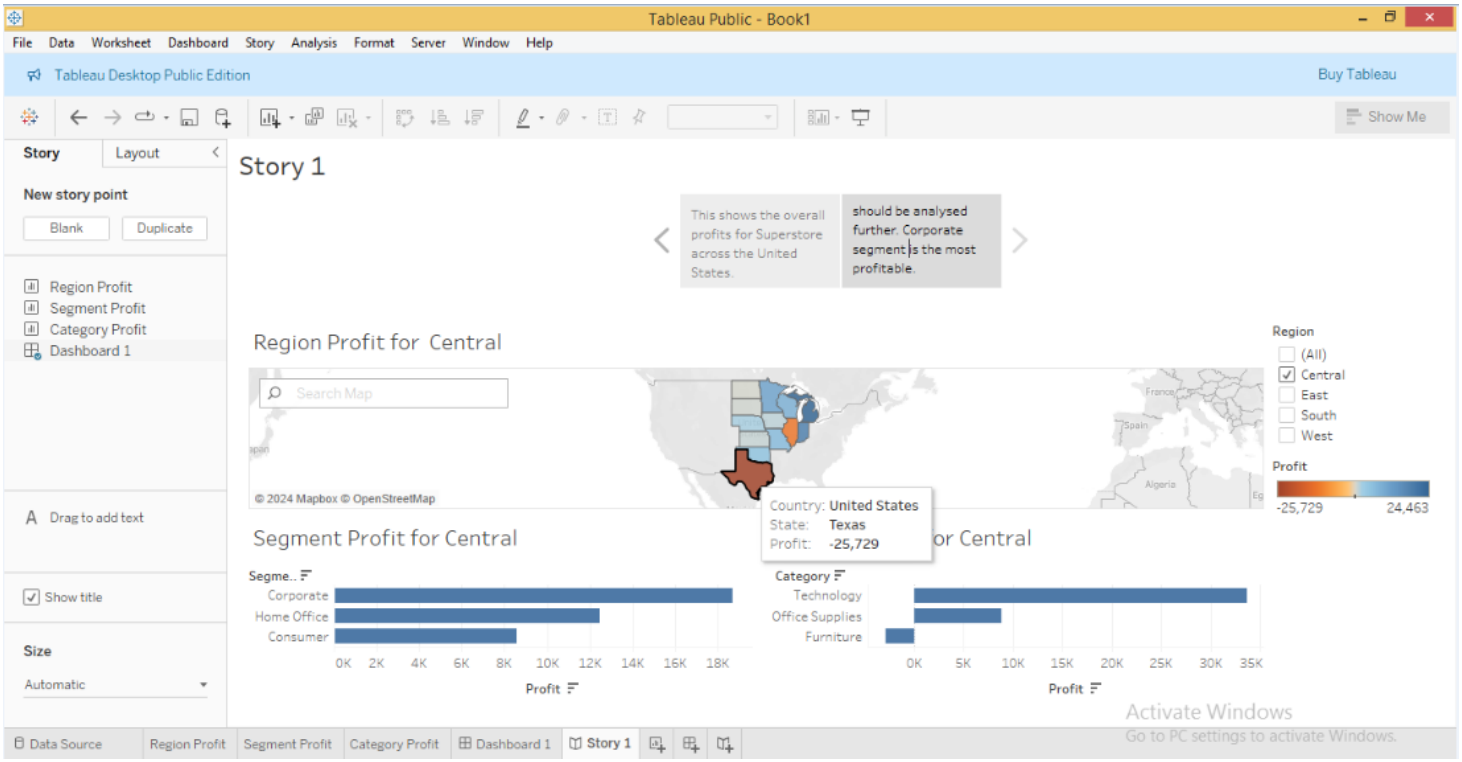


6. Add a Caption to the Story as shown below ***"This shows the overall profits for Superstore across the United States."***

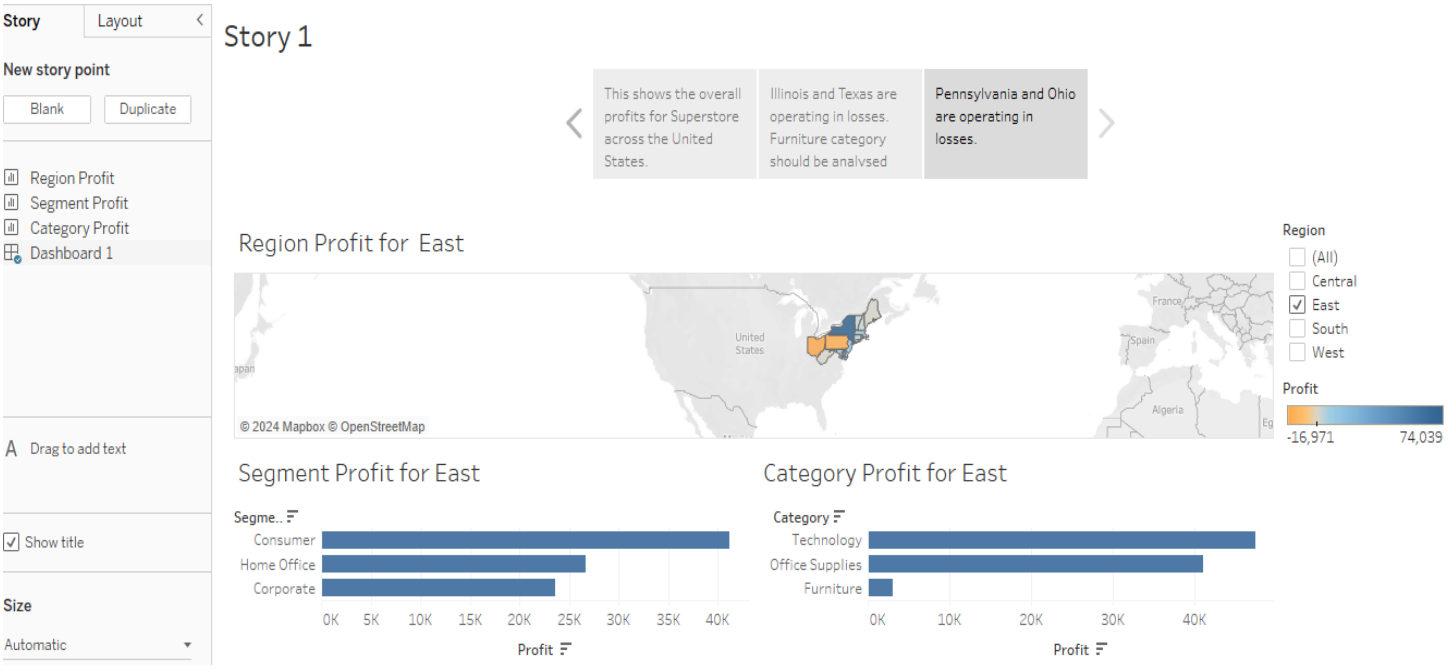


7. To create a next slide or next step in our story, click on **Blank** or **Duplicate**.
Now Click on **Blank,** new story board as opened up.
Now drag and drop dashboard again, now we will do Region by Region analysis.

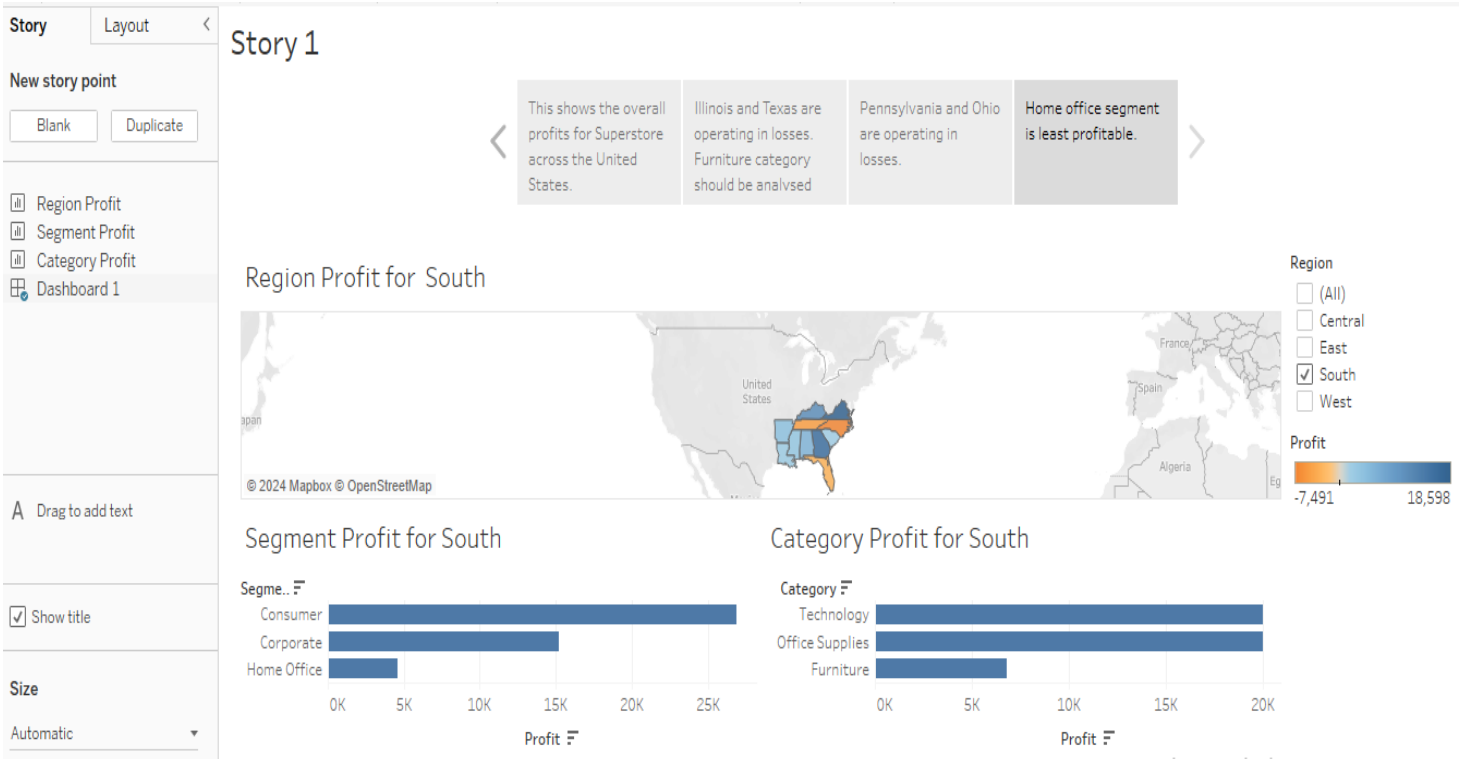
First we choose **Central Region,** we can see central region is come up in the map, we can see "Texas and Illinois" are in loss. Furniture category is in loss, Technology and office Supplies are doing well. Let's add the same in caption ***"Illinois and Texas are operating in losses. Furniture category should be analysed further. Corporate segment is the most profitable."***



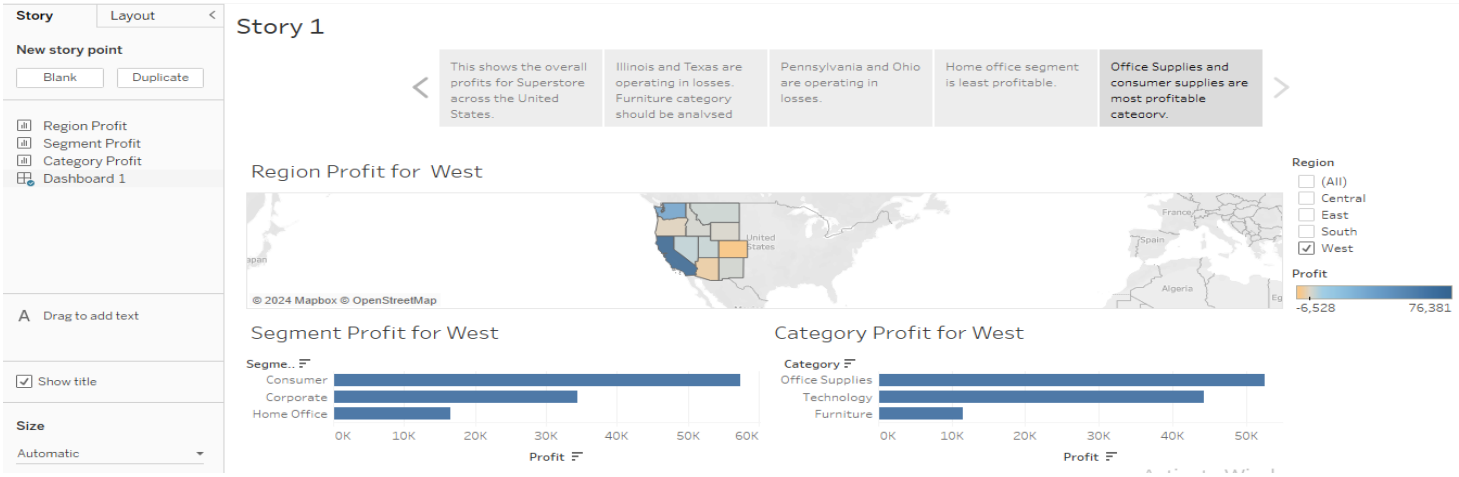
8. Now Duplicate and select East Region. And add a caption ***"Pennsylvania and Ohio are operating in losses."***



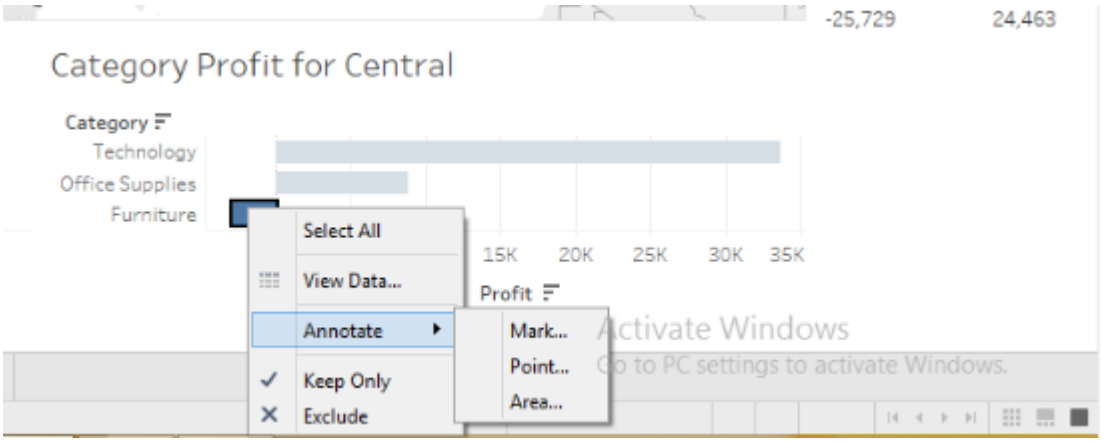
8. Again Duplicate and select South region. Add add a caption "***Home office segment is least profitable."***



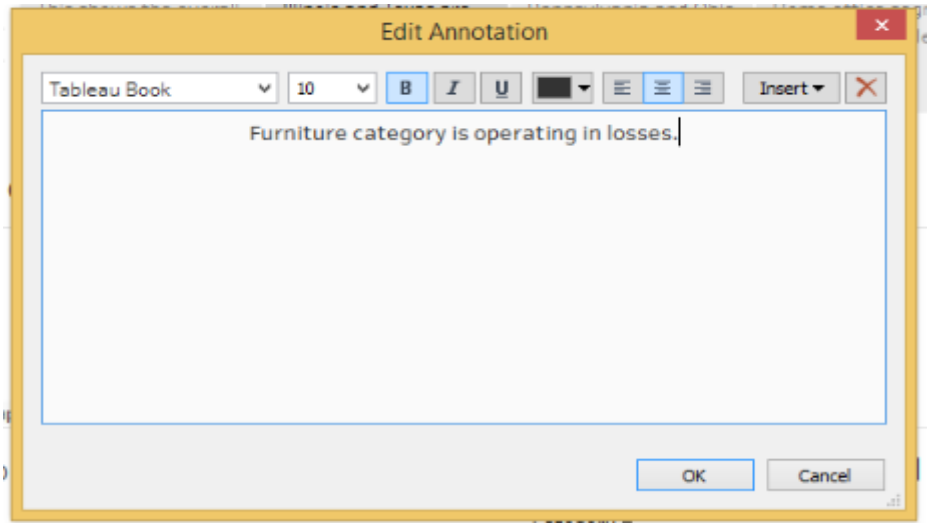
9. Again Duplicate and select West region. Add add a caption "***Office Supplies and consumer supplies are most profitable category***."

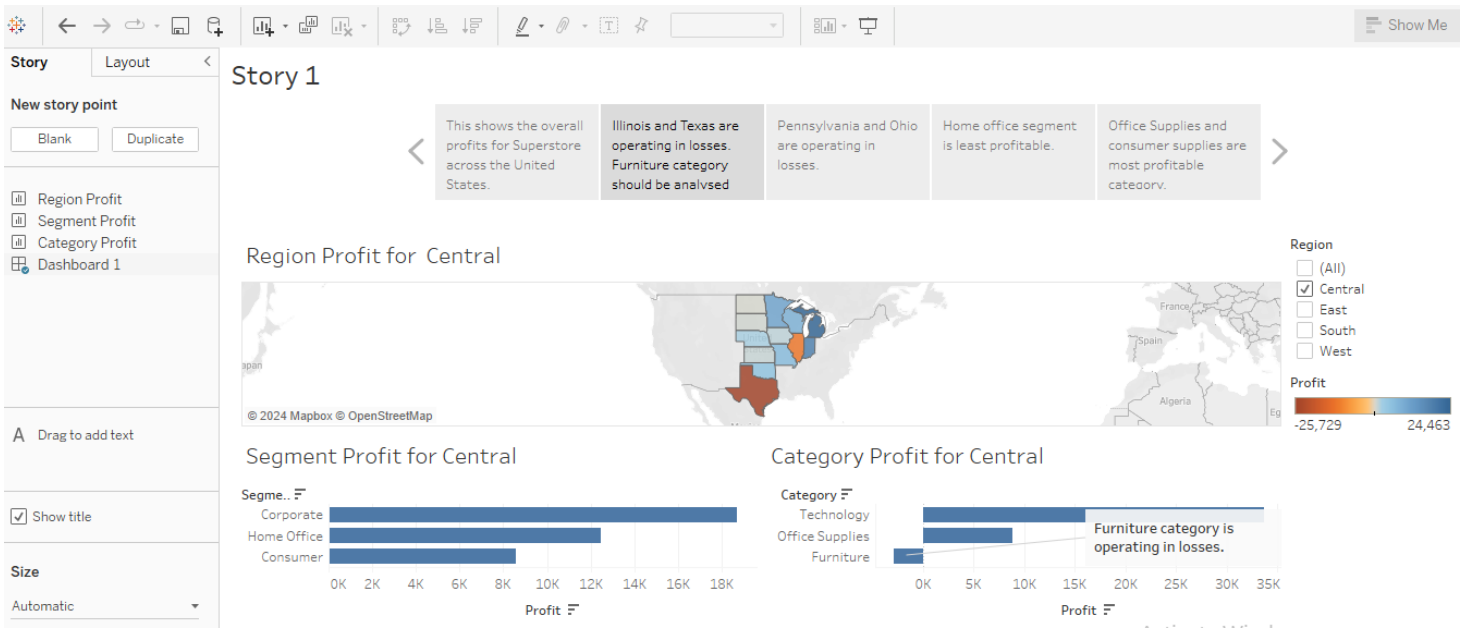


10. To add Annotation feature in story board. Goto Central Profit page ,Right click on Furniture(which is under loss)
Select **Annotate** and then **Mark.**



Add a caption as shown below:




Show Me
Story
Layout
New story point
Blank
Duplicate
Region Profit
Segment Profit
Category Profit
Dashboard 1
Drag to add text
Show title
Size
Automatic
Story 1
This shows the overall profits for Superstore across the United States.
Illinois and Texas are operating in losses. Furniture category should be analysed
Pennsylvania and Ohio are operating in losses.
Home office segment is least profitable.
Office Supplies and consumer supplies are most profitable category.
Region Profit for Central
© 2024 Mapbox © OpenStreetMap
Region
(All)
Central
East
South
West
Profit
-25,729
24,463
Segment Profit for Central
Segme..
Corporate
Home Office
Consumer
0K 2K 4K 6K 8K 10K 12K 14K 16K 18K
Profit
Category Profit for Central
Category
Technology
Office Supplies
Furniture
Furniture category is operating in losses.
0K 5K 10K 15K 20K 25K 30K 35K
Profit