Tableau Workshop: Cheat Sheet



Creating the First Graph

Opening the File

- 1. Create a new file
- 2. Connect to file
- 3. Type is 'text'
- 4. Choose the Dog Data file

Formatting the Data

1.The First Sheet

Change the 'zip' field to 'geographical'

- 1. Go to Sheet One
- 2. Right-click on the sheet to rename it
- 3. Rename it to "Top Ten Dog Breeds"
- 4. Drag "Breed" to **Columns**
- 5. Drag "Number of Records" to **Rows**
- 6. Sort (little icon of with an arrow pointing Filterdowne data
- 1. Drag "Breed" to "Filter"
- 2. choose the "Top" tab
- 3. choose 'By field', Top 10, Number of Records (Sum)

4idyichcko"OK"

- 1. Drag "Number of Records" to **Label**
- 2. Right Click on the left axis, click on "Show Header" to hide it.
- 3. Hide Tooltips:
 - 1. Menu/Tooltip...
 - 2. Unclick the "Show Tooltips" box
 - 3. click OK
- 4. Right-click on column labels
 - 1. Format...
 - 2. Click on Alignment
 - 3. Rotate to Vertical
 - 4. set "Wrap" to "off"
- 5. Give it a nice title

Second Graph

Getting Started

- 1. Create New Sheet
- 2. Name it ("Map").
- 3. Drag the "Owner Zip" to the center of the map.
- 4. Drag "Number of Records" to **color**
- 5. Exclude the outlier:
 - 1. Right-click on it

SolvarExclude XKCD Problem

Loading the Second Dataset

- 1. Go back to the "Data Source" pane.
- 2. Add the "2010 Census Data" data file.
- 3. in the "Join" box, choose "Owner Zip" on the left side
- 4. choose "Zip" on the right side

Shanchoosbe 'Maer as the join type

- 1. Go back to the map
- 2. Right-click on "Households"
- 3. choose Create...Field
- 4. Drag in "Number of Records"
- 5. Divide Number of Records by Number of Households
- 6. Divide "Number of Households" by 100 (to make the numbers more useful)
- 7. Update the title to "Dogs per 100 Households"
- 8. Verify your calculation looks like [Numb

9idying it upDrag it to the Color box.

- 1. Drag "Number of Households" to the tooltip
- 2. Drag "Number of Records" to the tooltip
- 3. Rename the sheet to something like "Dog Licences per 100 Households"
- 4. Update the title of the legend

Creating a Dashboard

Initial Creation

- 1. Create it (Button on the bottom, with the grid)
- 2. Rename it ("Dogs of the County")
- 3. Drag both of the worksheets in.
- 4. Click on "Size" and uncheck the "Maximum Size"
- 5. Right-click on the legend, "Select "Floating". **60nnMovegit to somewhere** attractive.
- 1. Click on the Map
- 2. Up in the headaer, click the tiny filter above the map use as filter
- 3. See that they're now connected.
- 4. Go back to the Top Ten Breeds worksheet
- 5. Click the arrow on "Sum(Number of Records")
- 6. Show the Header
- 7. Doubleclick on it
- 8. Make it "Automatic"
- 9. Click OK
- 10. Right-click on the axis
- 11. Hide it again
- 12. Go back to the Dashboard

Adding a Name to the Tooltip

- 1. Go back to the "Data Source" pane
- 2. Add in the zipcode data.
- 3. Join Zipcode with Zipcode.
- 4. Go Back to the Map panel
- 5. Drag "City" into the tooltip box
- 6. Edit the tooltip:
 - 1. Click on the tooltip box
 - 2. Rewrite the Zipcode to "For ()"
 - 3. Make it big, make it bold
 - 4. Hide the command buttons

Fix the blick OK

- Notice that there are 3M people in Gibsonia
- 1. Change it from being a SUM to an

Publish this!

1.

- 1. Go back to the Dashbord
- 2. Save to Tableau Public

13. Now you can see them work together well. Let's Tidy it Up

- 1. Remove the Toolbar (Dropdown arrow/View Toolbar/Hide)
- Remove the Tooltip Buttons (Worksheet menu/Tooltip.../deselect "Include Command Buttons")
- 3. hide map search (Map in top menu/Map Options/Deselect all)
- 4. Add Instructions: (From the "Dashboard" tab on the left)
 - 1. Choose "Text"
 - 2. Drag it over to the window
 - 3. Type some instructions
 - 4. Make it Floating (Dropdown arrow at top)
 - 5. Drag it somewhere attractive
- 5. Add a Gutter:
 - 1. Choose a "Blank"
 - 2. Drag it between the two graphs
 - 3. Make it smaller