

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. Change the 'zip' field to 'geographical'

The First Sheet

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 down)

Filtering the data

1. Drag "Breed" to "Filter"
2. choose the "Top" tab
3. choose 'By field', Top 10, Number of Records (Sum)
4. click "OK"

Tidying up

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
 2. Exclude

Solving the 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
5. choose "Inner" as the join type

Changing the Map Calculation

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 $[\text{Number of Records}] / ([\text{Households}] / 100)$
9. Drag it to the Color box.

Tidying it up

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".
6. Move it to somewhere attractive.

Connecting the Worksheets

1. Click on the Map
2. Up in the header, 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
13. Now you can see them work together well.

Let's Tidy it Up

1. Remove the Toolbar (Dropdown arrow/View Toolbar/Hide)
2. 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

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
 5. Click OK

Fix the bugs

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

Publish this!

1. Go back to the Dashboard
2. Save to Tableau Public