



On-Demand Training: Basic Mapping Transcript

Welcome to Tableau's Basic Mapping Video. We'll be using Tableau Desktop 8 to show you how you can connect your data and instantly plot that data on a map.

We've connected to the Sample Superstore English data source which should be included with your installation of Tableau Desktop. In this video we'll be showing you how to create basic symbol maps, how to change the map style, how to add different layers such as map layers and data layers, how to use size and color to analyze your data, how to create filled maps, what a small multiples map is, and finally, how to create a dual axis map.

Tableau will automatically identify geographic fields within your data source if they have common field names such as Country, State, City or Postal Code. You can right-click on any of these fields to see the geographic role it's been assigned as well as reassign it a new geographic role. You can also click on any other dimension field and select geographic role if Tableau has not automatically identified it as having one. Once Tableau has identified a field or assigned it with a geographic role, you'll see a globe icon next to that field name and using the latitude and longitude coordinates that are pre-generated by Tableau, you can instantly plot those marks on your map without having to enter the latitude and longitude coordinates within your data source.

Let's go to show you how to create a basic symbol map. I'll create a new worksheet and simply by double-clicking on one of these geographic fields, I can create that map. I can also just drag the field into my view, or place it onto the level of detail shelf if I want to. I'll call this "Example 1".

Next, we'll show you how to go ahead and apply different map styles to the map you just created. Create a new worksheet to recreate that same map. If I go to the Map menu and select Map Options, I can change the style to what I want. The default style is Gray, but in this case I'll change it to Dark. I'll also click on the Color option to change the color so that it's easier to see. We'll call this sheet "Example 2".

We can do the same thing with map layers and data layers. I'll go ahead and plot my marks and focus simply on the United States. I'll go back to the map options and add different map layers to this map. We'll call this "Example 3".

Let's go now and repeat that process to add some data layers. Data layers contain the most recent census data. You can choose from the US population all the way down to US housing. I'll choose Population. And I'll go down to the county level and I can even change the color sequence. I'll call this "Example 4".

You can use the color and size shelves to help you analyze the data on your map. I'll double-click on Country, and next, I'll go ahead and drag the Sales field onto the size shelf. This way I can see what the sum of sales is for each of my countries. If I place the Profit field on the Color shelf, I can now see what the profit is by color. I'll double-click on this color scheme and change it to have the Red-Green Diverging palette. I'll also select the Full Color Range if I want to make that stand out a little bit better. At any time, you can apply some more additional formatting by changing the transparency or adding borders. We'll call this "Example 5".

We'll go ahead and show you how to create a filled map. All you need to do is double-click on your geographic field and then, either change the Marks card to Filled Map, or you can place a Measures field on the color shelf. I'll go ahead and call this "Example 6".

A small multiples map will help you analyze multiple dimensions across your map within the same view. Let's create a new worksheet and do that. I'll go ahead and plot my states and focus in on the United States. I can go ahead and place Profit on the Color shelf to create that filled map and now, I can drag other dimensions onto my columns

and rows shelves. I'll place Customer Segment on the Columns shelf and I can see each of my Customer Segments across this map. I can also go and place Ship Mode onto the Rows shelf and see the cross-section between consumer, corporate and home office segments across the Delivery Truck, Express Air and Regular Air segments. If I look at the first segment, it looks like California has profitability issues when it comes to Consumer Segments and Delivery Truck Shipments. I'll call this "Example 7".

For a final example, we'll be creating a Dual Axis map. A Dual Axis map overlays one map on top of another. In this example, we're looking at a symbol map over a filled map. Let's go ahead and recreate this view. Create a new worksheet and then go ahead and double-click on the State field. We can focus in on the United States region by selecting those marks and Keeping Only. Next, we want to change this map to be a filled map, so we'll use the Filled Map option from the Marks card. We can drag the Region field onto the Color shelf and this will color each of the regions its own color. We can even right-click on International and exclude that if we want to. Next, we want to duplicate this map, so we can simply hold down Control and left-click and drag to do so, or we can drag the Latitude field to the right of the original one.

Now that we have a duplicate map, we can focus on that map and change it into a symbol map. We'll select the last latitude field which represents the one that we just created here. So if I click on Latitude at the very bottom, I can convert this into a pie chart map. Next, I want to go ahead and replace the Region on the Color shelf with the Department field. So drag Department onto the Color shelf and now we can see the pie chart divided up by each department. I also want to size each of these marks by the sum of sales, so I'll drag Sales to the Size shelf. I also want to go ahead and show the respective profit values for each individual department, so I'll drag Profit onto the Angle shelf. Now that I have this map, I can resize each of these pie charts by using the size option and if I'm happy with what I see, I can left-click on the second latitude field and select Dual Axis.

If you want to apply addition formatting, you can do that. You can click on the Color shelf and change the transparency, if you like to, as well as add borders. If you don't like the colors you see in your Filled map you can just double-click on that color legend, and assign a different palette. You can also go ahead and individually choose what color you want for each of these regions. I'll go ahead and call this "Example 8".

Well, thank you so much for watching Tableau's Basic Mapping Video. Please download the companion workbook to practice what you just learned today and please watch our other on-demand videos to learn more about Tableau and its other products or other features.