

# INSTRUCTIONS: USING TABLEAU<sup>\*</sup> TO MAP INFORMATION ON NURSING HOMES IN YOUR STATE

## **Downloading Tableau<sup>+</sup>**

- 1. Visit <a href="https://public.tableau.com/en-us/s/download">https://public.tableau.com/en-us/s/download</a>.
- 2. Enter your email address.
- 3. Select "DOWNLOAD THE APP."



- **4.** After the file has been downloaded, select "Run" and follow the prompts to install Tableau on your Mac or Windows computer.
  - On Windows, the Tableau Public shortcut should be visible on your desktop. Double click it to open.



Tableau icon

<sup>\*</sup> Note: A Tableau-friendly nursing home dataset and other information is available at <u>https://nursinghome411.org/tableau-friendly-nursing-home-compare-dataset/</u>.

<sup>&</sup>lt;sup>†</sup> Tableau download instructions by chadskelton.com/p/installing-tableau-public-and-open.html

- On a Mac, you may have to search for Tableau by double clicking the search icon in the top right and typing in 'tableau.'
- Drag the program into your dock and double-click the icon to load Tableau Public. Your screen should look like this:

	Tableau Public - Book1	
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## **Getting Started**

- 1. Open Tableau Public.
- 2. Select Microsoft Excel on top left to add file(s).
- 3. Select file titled "US.NHdatawithcoordinates.xlsx" (or other file of interest).
  - Note: File is available at <a href="https://nursinghome411.org/tableau-friendly-nursing-home-compare-dataset/">https://nursinghome411.org/tableau-friendly-nursing-home-compare-dataset/</a>.

Connect	Open				Discover
To a File Microsoft Excel Text file JSON file Microsoft Access PDF file Spatial file Statistical file	New York SFFs and	New York Nursing H	Annual Per Capita Ci	Open from Tableau Public	How-to Videos     Overview     Intro to the interface     Chart Types     More how-to videos
To a Server OData More					Viz of the Day The Songs of Hans Zimmer Blog - Visualize your Isteming habits with Last/m and Spot data Sample Data Sets Live Training

- Excel files should include latitude, longitude, and variables of interest (i.e., Overall rating, Provider name, etc.). <u>Note:</u> Excel files should be checked for errors, missing data points, outliers, etc.
  - If the excel file contains multiple sheets, drag sheet(s) of interest into the area labeled "Drag sheets here."
  - In this example, we will drag "Ratings&SFF" to "Drag sheets here" area.

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• Click **Sheet 1** at the bottom left, then right click **Sheet 1** to rename (i.e., New York Nursing Home Ratings).

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Sheets         P           Use Data Interpreter         Data Interpreter might be able to clean your Microsoft Excel workbook.           Image: All Provider Info         Image: All Provider Info				Provider Name Provider State Provider Zip Code Special Focus Status <i>Measure Names</i>	Color color Detail	⊖ Size ⊽ Tooltip	T Text	
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#### **Creating Data Points**

- 1. On the left column, there are two sections: 1) **Dimensions** and 2) **Measures.**
- 2. Under Dimensions, select Provider State and drag into Filters shelf. Select state(s) of interest.

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- 3. Under Measures, find items labeled "Latitude" and "Longitude."
  - Drag Latitude and Longitude above into Dimensions. (Do <u>NOT</u> use items labeled "Latitude (generated)" and "Longitude (generated)."
  - Double-click Longitude or drag to Columns on shelf on top of map. Double click Latitude or drag to Rows (below Columns).



- 4. Under Dimensions, select Provider Name and drag into Detail in the shelf labeled Marks.
  - The map will now display your state's nursing homes and locations.



## **Illustrating Overall Ratings by Color**

- 1. Under Measures and Dimensions, identify variable(s) of interest: Overall Rating, Health Inspection Rating, QM Rating, and Staffing Rating.
- 2. Drag variables of interest from Measures to Dimensions.
- 3. To illustrate overall ratings by color, drag Overall Rating to Color (found in Marks shelf).



• Edit Colors and Legend title by hovering over **Overall Rating** on top right and selecting arrow, **▼**.



• Edit colors **manually** by assigning colors to each number or automatically assign colors by selecting Tableau's **Color Palettes**.



Manual color assignment (left) vs. Tableau color palette (right)

• Rename values in Legend by right clicking value and selecting Edit Alias.

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## Illustrating Special Focus Facility (SFF) Status by Size

1. Under Dimensions on left, drag SFF Status to Size (found in Marks shelf).



• To edit legend (title, circle size, etc.), hover over **SFF Status** on top right and select the arrow, **▼**.





• To re-order Legend, select **Manual** and adjust items by preferred order.



• To resize circles, select Edit Sizes and toggle Mark size range.

Sample legend:	Mark size range:		
<ul> <li>Null</li> <li>One-star</li> <li>SFF Candidate</li> </ul>	Smallest		Largest
SFF			-
Reset	ОК	Cancel	Apply

#### **Secondary Variables**

- 1. Under dimensions, identify secondary variables of interest (QM Rating, Staffing Rating, and Health Inspection Rating). Select variables and drag to Marks under Details.
  - When hovering over a nursing home, you will now see primary and secondary variables.



• Edit tooltip display by selecting **Tooltip** under **Marks**.



• Here, you can delete unwanted fields (Latitude and Longitude) and rearrange items (Moving up Provider Name, SFF Status, Overall Ratings).



## **Finishing Touches**

#### 1. Map Layers

- Go to Map on top right and select Map Layers.
- Under Map Layers, select desired items (county names, county borders).



#### 2. Data Layers

- Go to Map on top right and select Map Layers.
- On Bottom left under **Data Layer**, select desired demographic and boundary.

Data Layer	
Layer: No Data Layer	$\sim$
Make Default Rese	t





New York City Per Capita Income (By Census Tract)

#### 3. Title

• Double click the title area to adjust font size, color, type, etc.



#### 4. Search Boxes

- To add a search box for facility, select arrow next to "Provider Name" and select **Show Filter**.
- A list will appear to the right of the map; click the dropdown arrow and select **Single Value (dropdown)**.
- Select **Only Relevant Values** to capture New York nursing homes. Now a dropdown menu should appear.
- Select (All) to show all facilities.



## **Publishing and Embedding**

- 1. Select file on top left and save to Tableau Public.
- 2. Once map is online, select share button on bottom right to find embed code and link. Your Tableau map is now complete. You may revise by editing file in Tableau and selecting save.



For additional resources on nursing home information and data, please visit: www.NursingHome411.org.