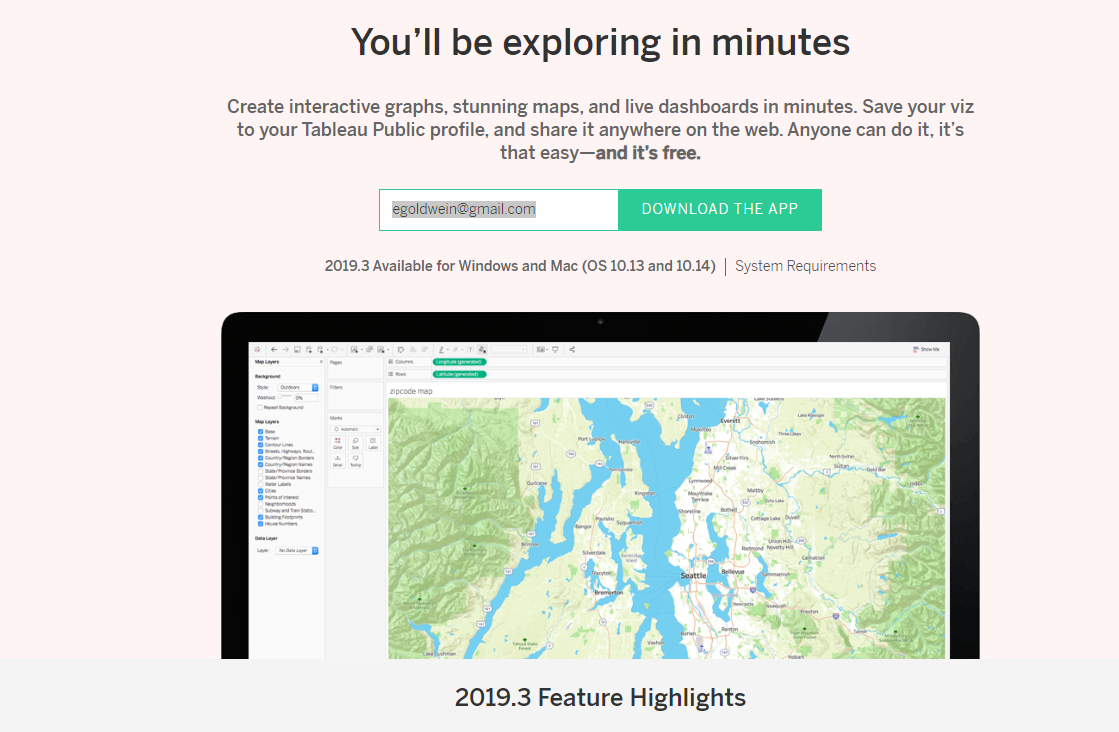
# Tableau Instructions: Using Tableau To Map Information On Nursing Homes In Your State.

By Long Term Care Community Coalition

**Downloading Tableau (instructions via chadskelton.com/p/installing-tableau-public-and-open.html):**   
1. Visit <https://public.tableau.com/en-us/s/download>, enter email, select **DOWNLOAD THE APP.**



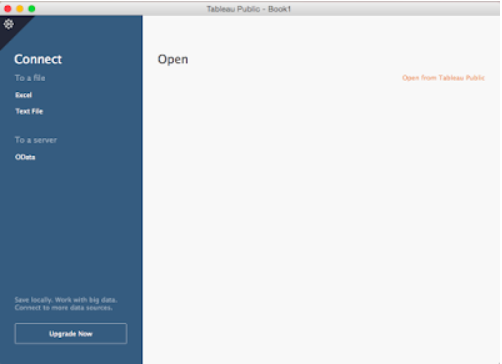
2. After file has been downloaded, run it and follow the prompts to install Tableau on your Mac or PC.

1. On a PC, Tableau Public shortcut should be visible on your desktop. Double click it and

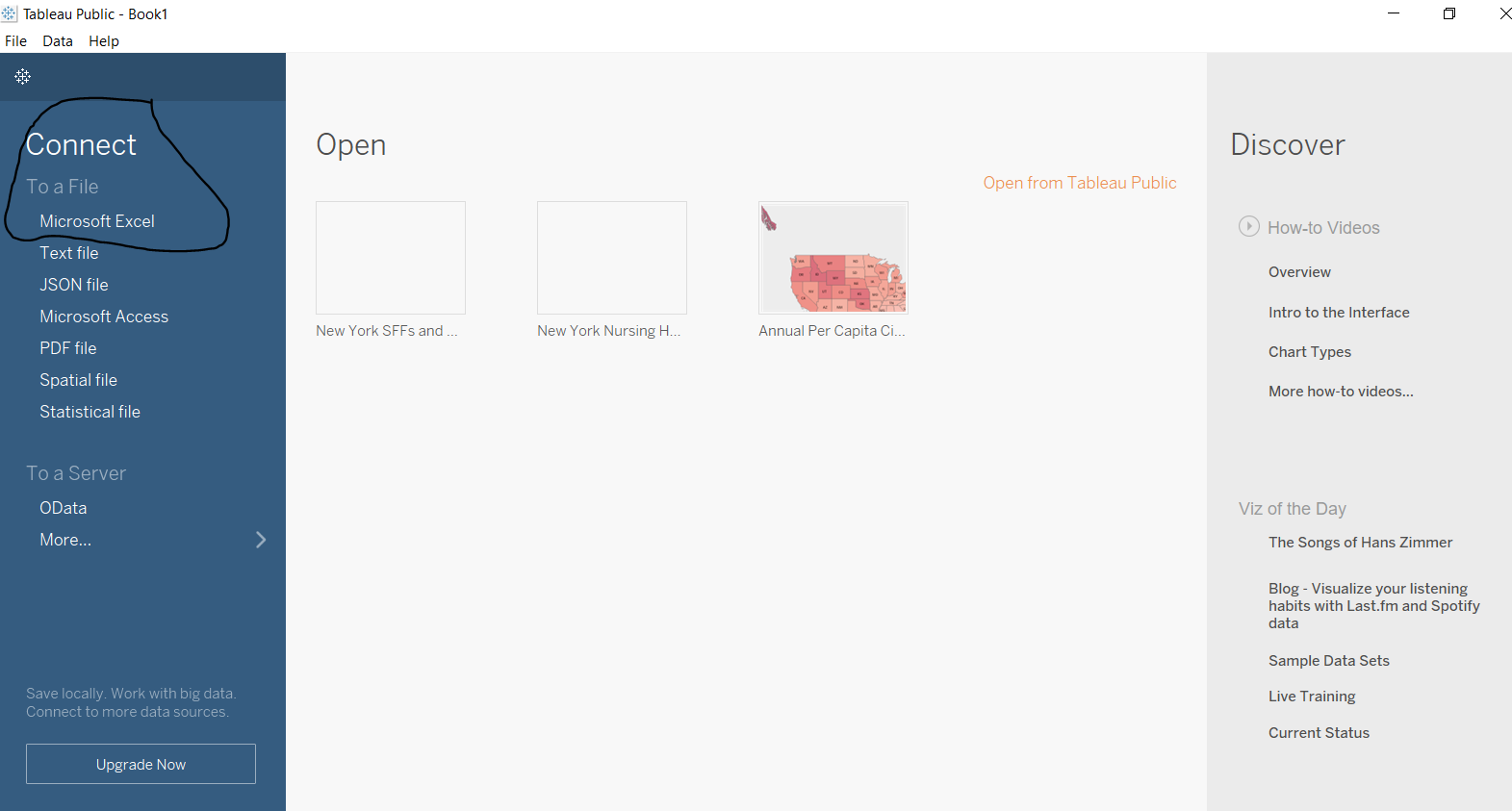


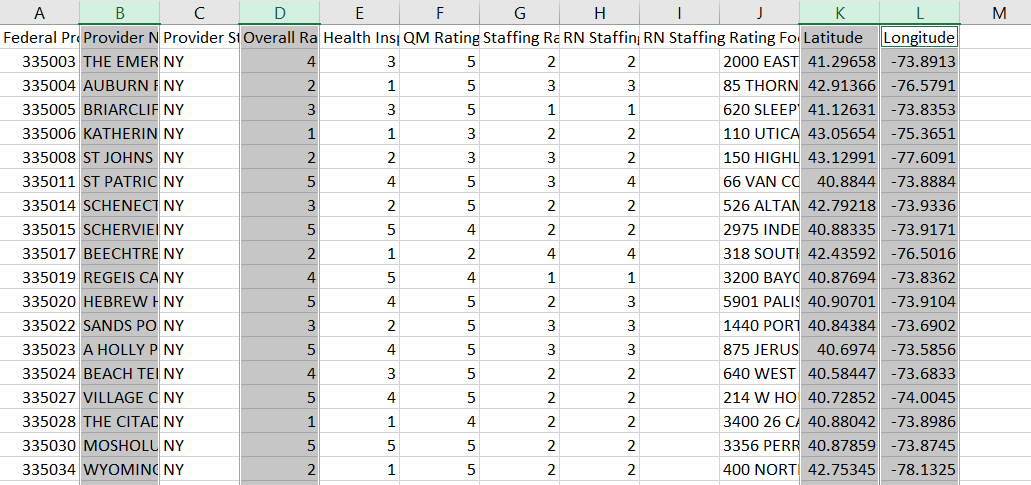
PC Tableau icon

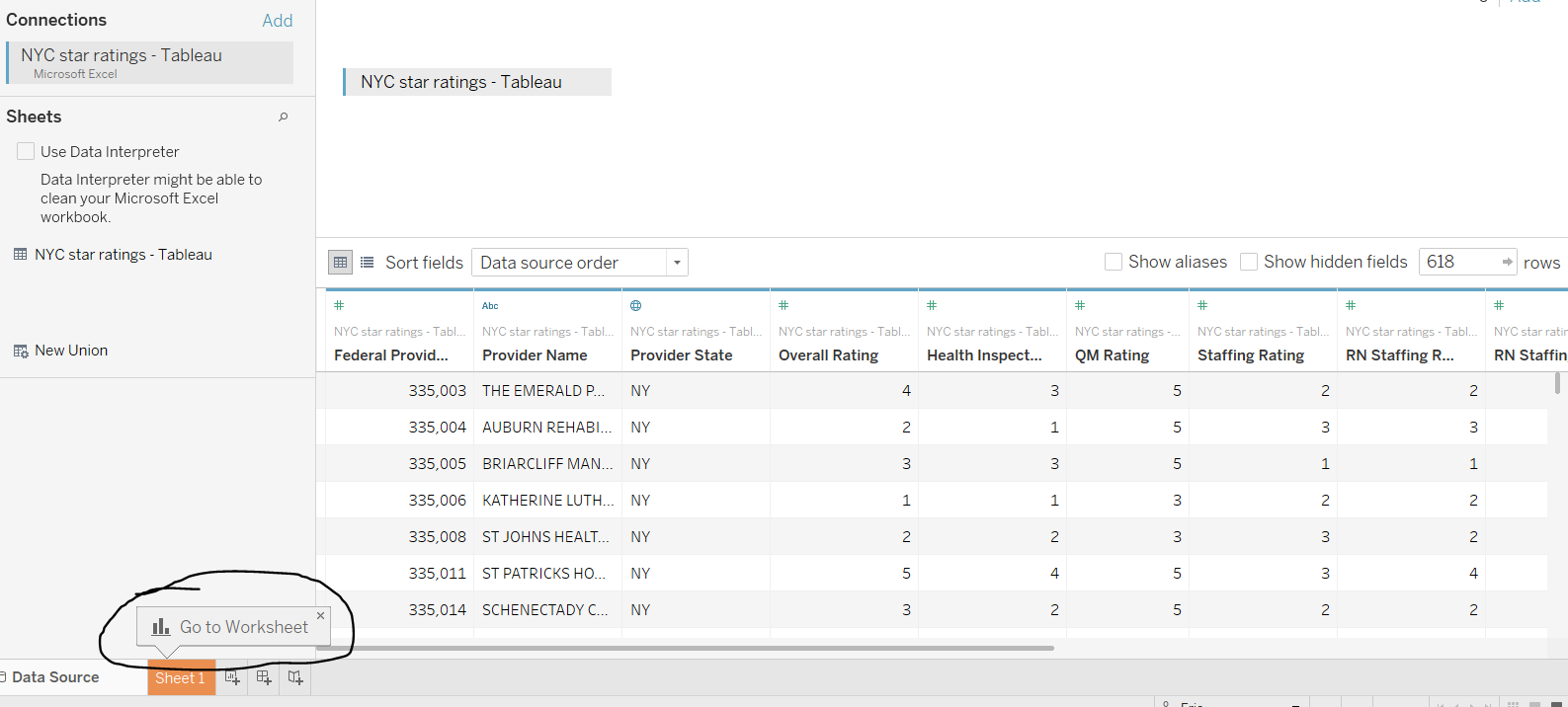
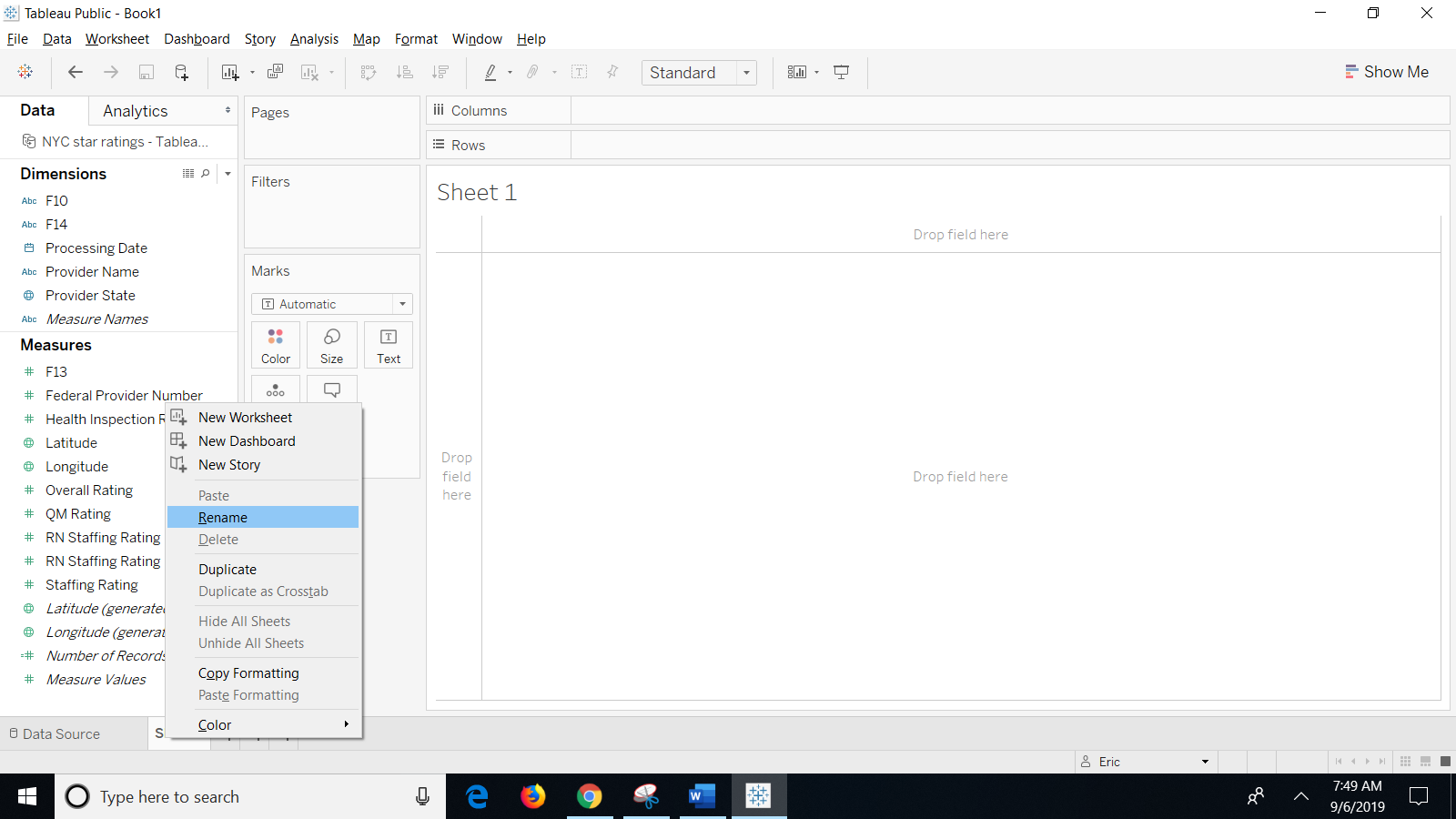
1. On Mac, you may have to search for Tableau by double clicking search icon in the top right and typing in 'tableau'. Next, drag the program into your dock and double click icon to load Tableau Public. Your screen should look like this:



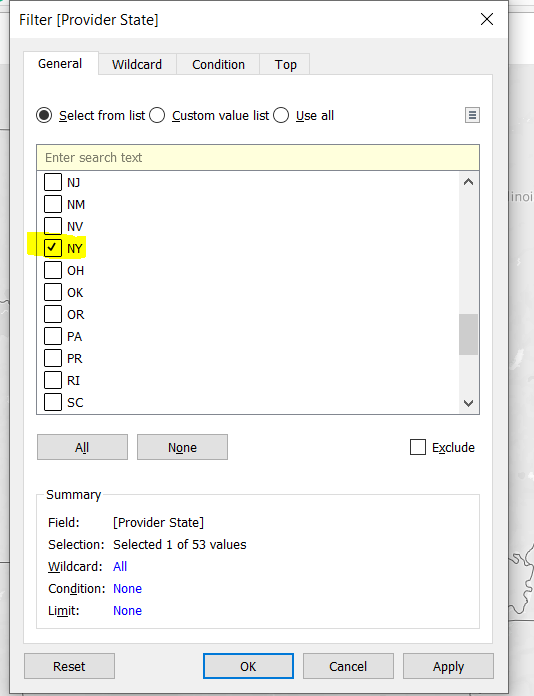
1. **Getting Started**
   1. Open Tableau Public. Select **Microsoft Excel** on top left to add files. Select **Conference.US NH ratings&SFF.xlsx**.



* 1. Excel files shouldinclude latitude, longitude, and variables of interest (ie. Overall rating, Provider name, etc). ****
     1. ***Note: Excel file should be checked for errors, missing datapoints, outliers, etc.***
  2. Click **Sheet 1** on bottom left, then right click **Sheet 1** to rename (i.e. New York Nursing Home Ratings)

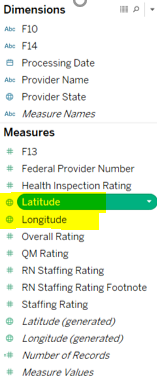
 

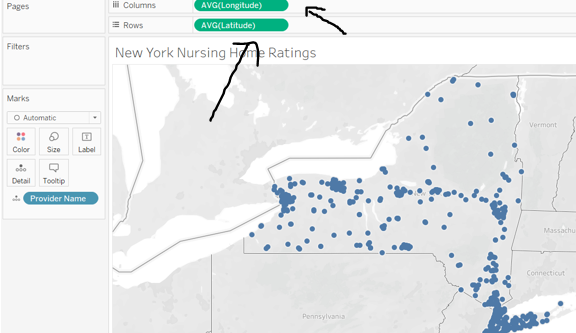
1. **Creating Datapoints**
   1. On the left column there are two sections: 1) **Dimensions** and **2) Measures.**
   2. Under Dimensions, select **Provider State** and drag into **Filters** shelf. Select state(s) of interest.



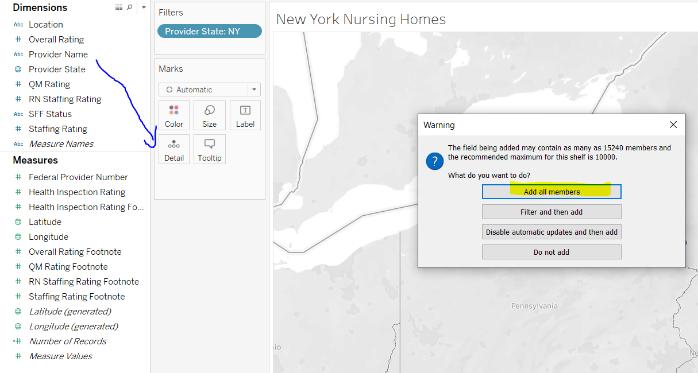
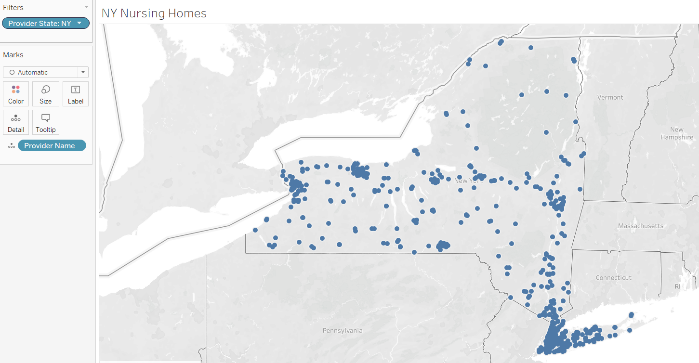
Filtered by state (NY)

* 1. Under **Measures**, find items labeled **“Latitude” and “Longitude.** Do **NOT** use items labeled “*Latitude (generated)”* and *“Longitude (generated)”.* Drag**Longitude** to **Columns** on shelf on top of map. Drag **Latitude** to **Rows** (below **Columns**).



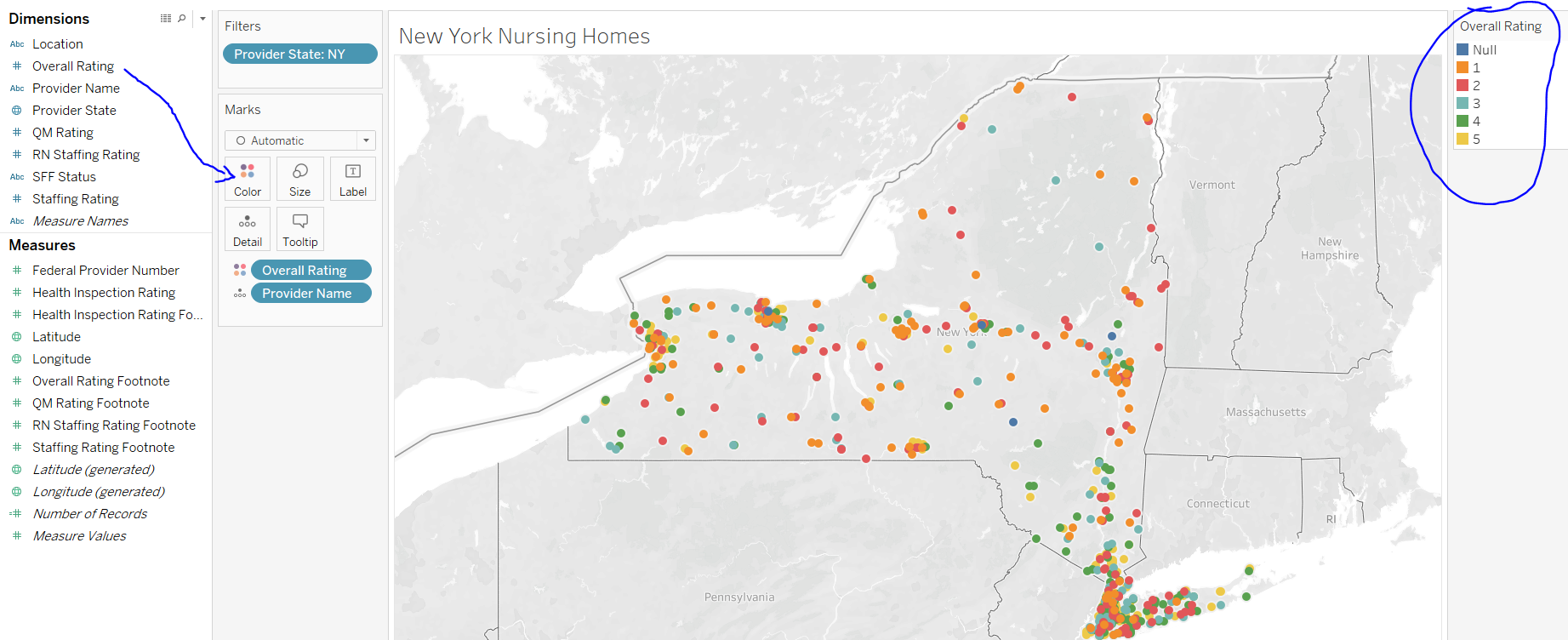


* 1. Under Dimensions, select **Provider Name** and drag into **Detail** in the shelf labeled **Marks.** The map will now display your state’s nursing homes and locations.

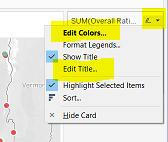


New York nursing home locations

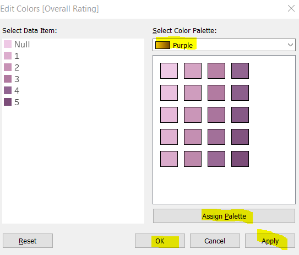
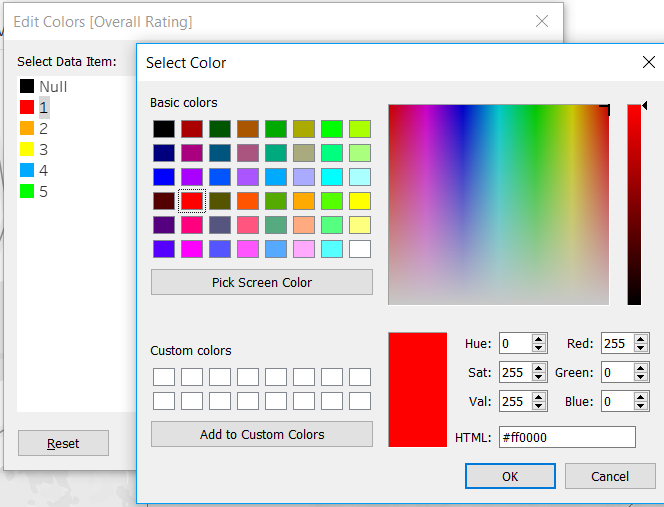
1. **Illustrating Overall Ratings (by Color)**
   1. Under **Measures** and **Dimensions**, identify variable(s) of interest: **Overall Rating, Health Inspection Rating, QM Rating, Staffing Rating**.
      1. Drag variables of interest from **Measures** to **Dimensions.**
   2. To illustrate overall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



* + 1. Edit Colors and Legend title by hovering over **Overall Rating** on top right and selecting arrow.

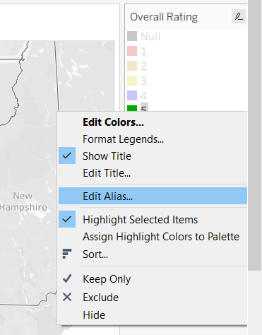
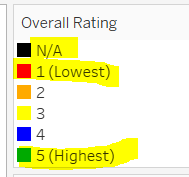


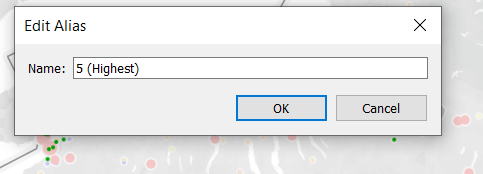
* + 1. Edit colors **manually** by assigning colors to each number or automatically assign colors by selecting Tableau’s **Color Palettes**.



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

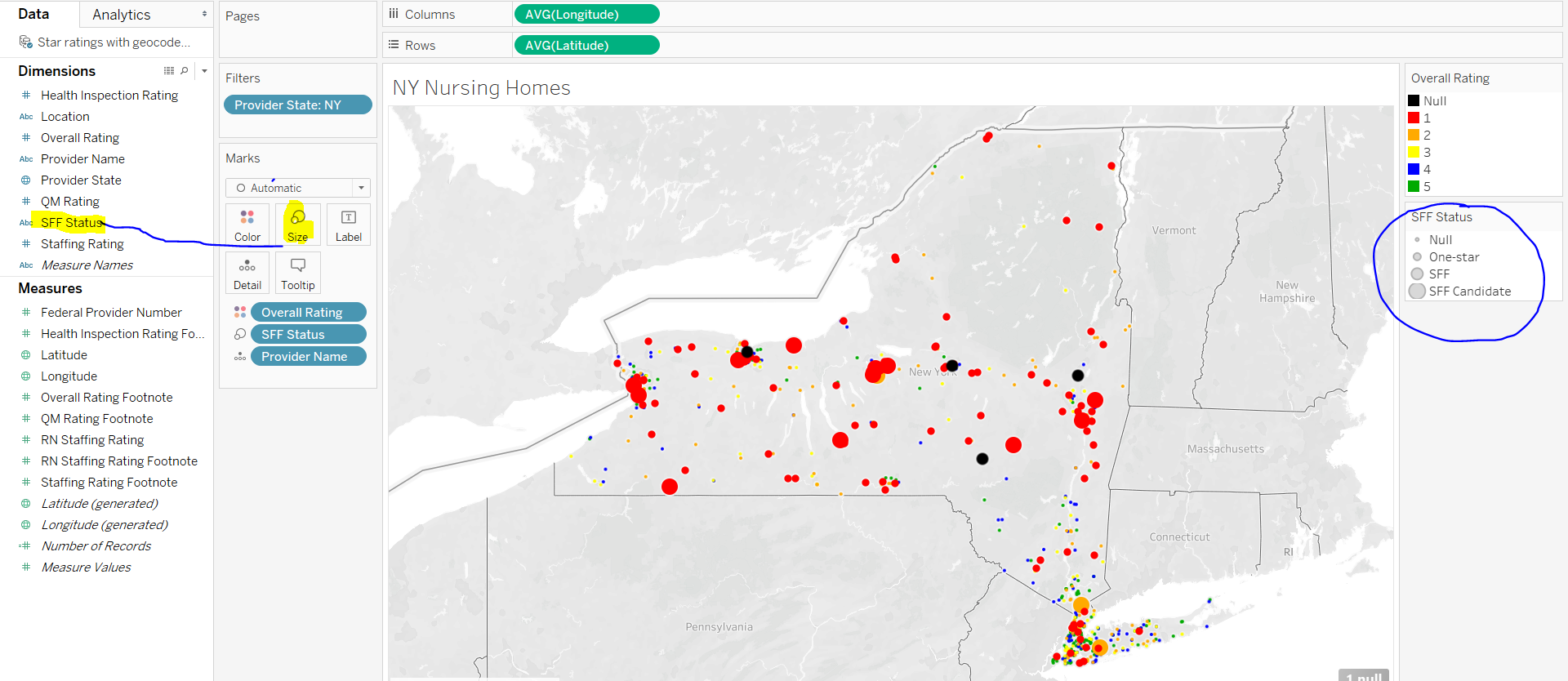
* 1. Rename values in **Legend** by right clicking value and selecting **Edit Alias.**



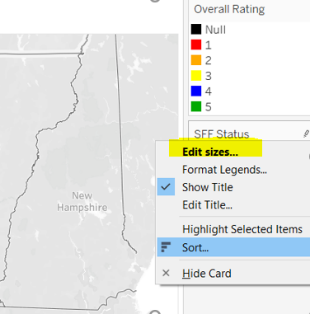


Alias changed from "5" to "5 (Highest)"

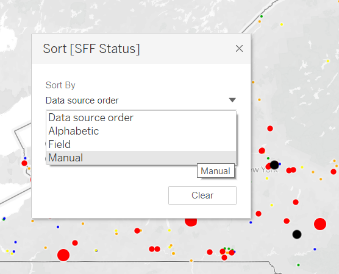
1. **Illustrating Special Focus Facility (SFF) status (by Size)** 
   1. Under **Dimensions,** drag **SFF Status** to **Size** (found in **Marks** shelf).

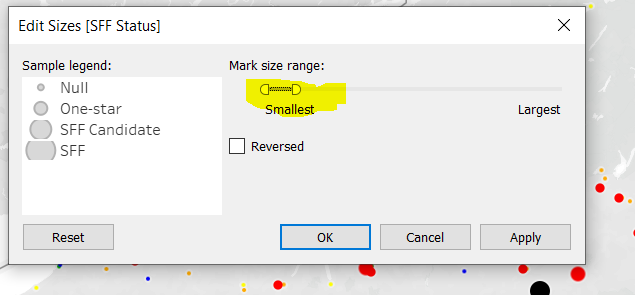


* 1. To edit legend (title, sizes), hover over **SFF Status** on top right and select arrow.

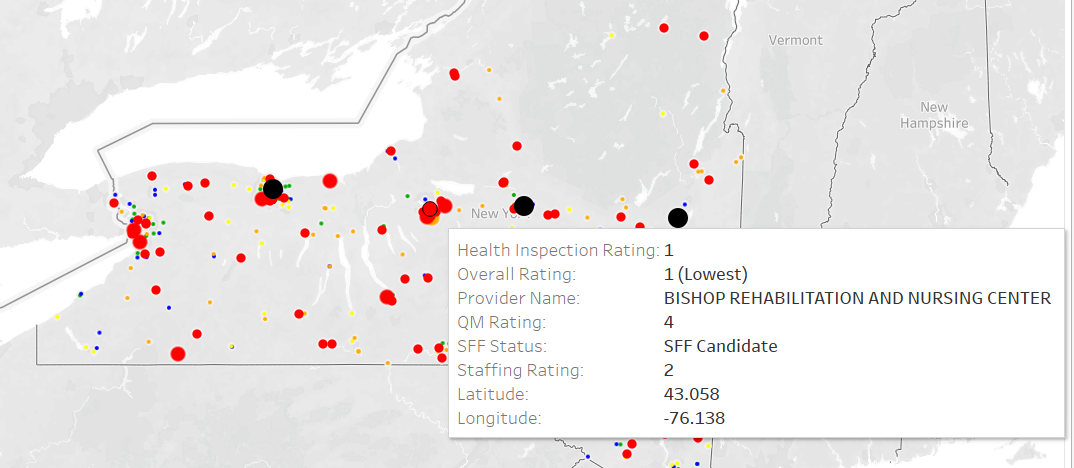


* + 1. To re-order Legend, select **Manual** and adjust items by preferred order.



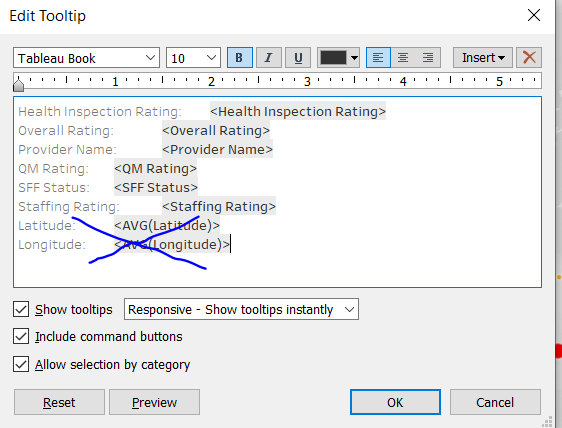
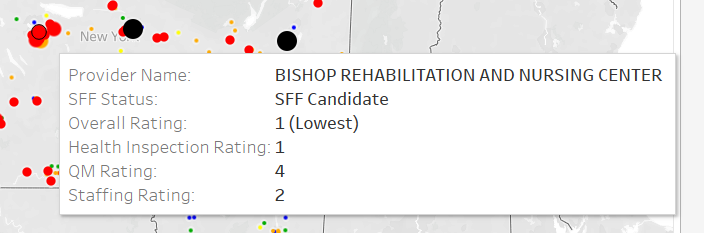
* + 1. To resize circles, select **Edit sizes…** and toggle **Mark size range.** 

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



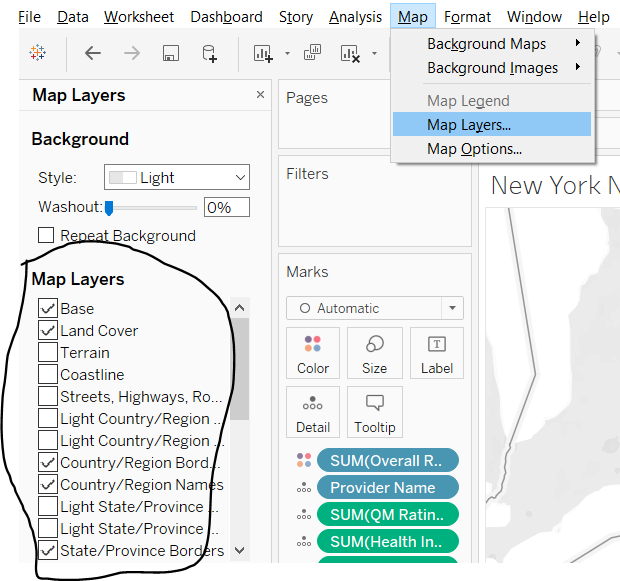
Unedited Tooltip

* + 1. To edit hover display, select **Tooltip** under **Marks**. Here, you can delete unwanted fields (**Latitude** and **Longitude**) and rearrange items (Moving up **Provider Name, SFF Status, Overall Ratings**).

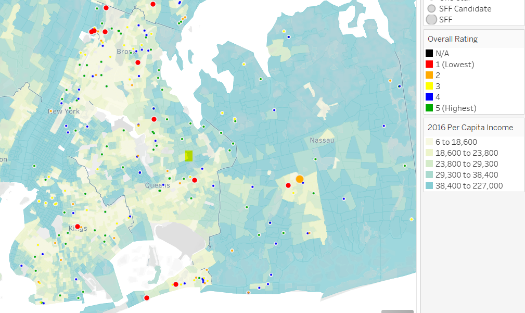


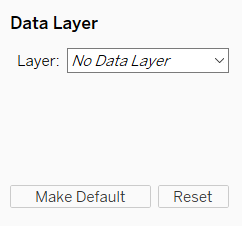
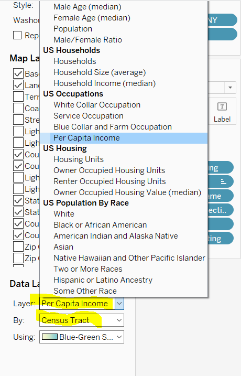
Updated Tooltip

1. **Finishing touches**
   1. **Map Layers** 
      1. **Go to Map** 🡪 **Map Layers**. Under **Map Layers**, select desired items (county names, county borders).



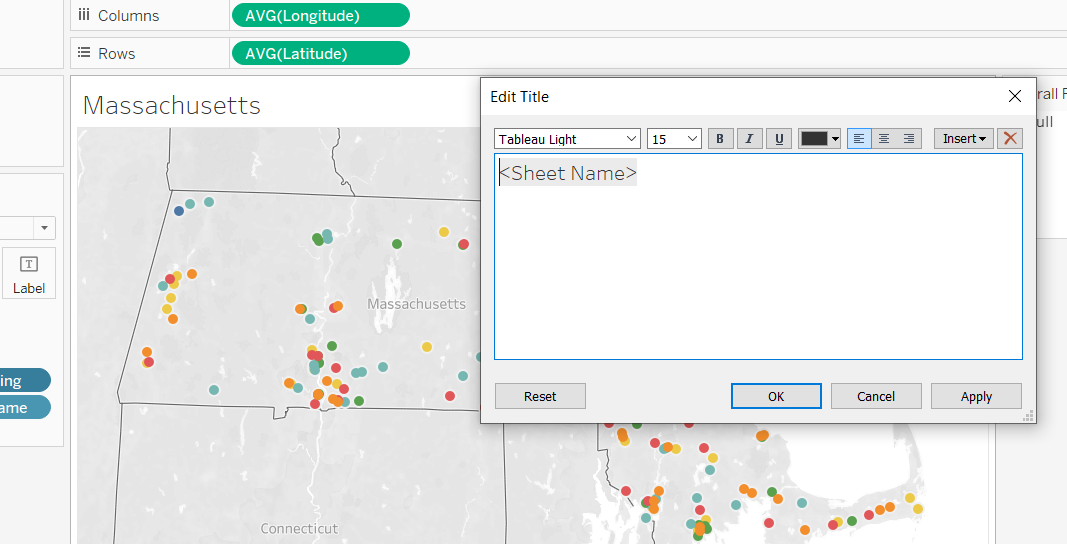
* 1. **Data Layers**
     1. **Go to Map** 🡪 **Map Layers** 🡪 **Data Layers** (scroll down). Under **Data Layers**, select desired demographic and boundary.





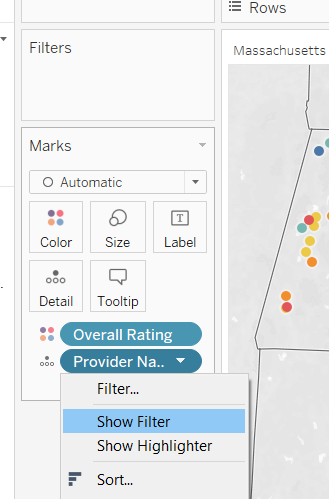
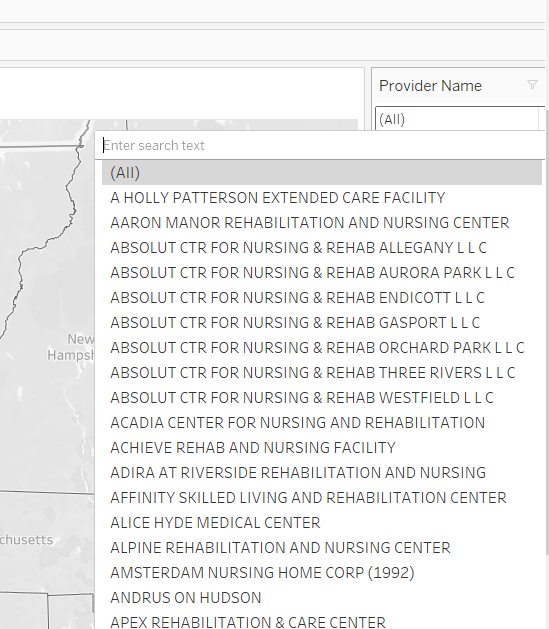
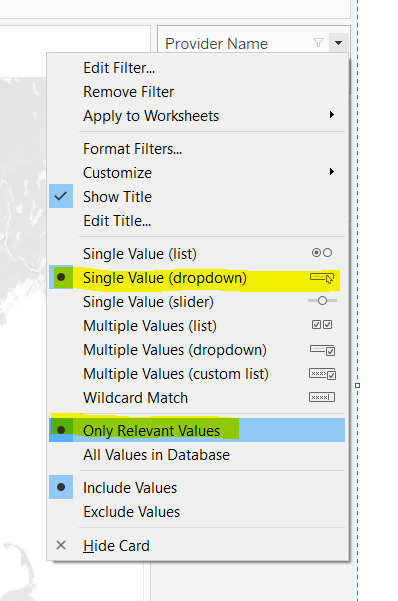
New York City Per Capita Income (By Census Tract)

* 1. **Title.** Double click title area to adjust size, font, text, etc.



* 1. **Search boxes**.

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



Dropdown list includes all 618 New York nursing homes

1. **Publishing and embedding**
   1. File 🡪 Save to Tableau Public. Once map is online, select share button on bottom right to find hyperlink and embed code.

