



Free Training Transcript: Story Points

Welcome to this video on Story Points. You can download the Exercise workbook to follow along in your own copy of Tableau.

What Are Story Points

Story Points let you create compelling, interactive, data-driven stories. Stories consist of specific views or dashboards in sequential presentation, for example letting the audience walk through a discovery you made as you were analyzing data. Let's see what that means. This workbook already has several visualizations and a dashboard built out. Story Points allows us to present them to communicate insight we want to share.

Creating a New Story

To create a new Story, click the Story tab at the bottom. We can size this story so it best fits our dimensions. Just like when building a dashboard, our previously created pieces of content are arranged here on the left. Let's click and drag out our first sheet onto the canvas. We can give this point a caption by clicking in the navigator box. I'll be adding captions as I go to help keep track of the points, you may want to pause the video to type the captions yourself. If the caption doesn't fit, we can always adjust the size of the navigator.

Updating a Point

This visualization is still fully interactive, as we can see by clicking through the filter. Did you notice that when we changed the state of the viz, the word "Update" appeared above the navigator box? A major benefit of Story Points is the ability to preserve a specific state of a given visualization – like a filter or highlighting. Clicking "Update" preserves our modification for this point, essentially taking a snapshot of the filter selection we made. Alternatively, we could revert by clicking the undo icon. When a change to the Point is made, we're also presented with the option to Save as a New Point. It's the same underlying visualization, but with that filter selection saved as the default.

Creating Additional Points

Let's expand our story. To keep track of what sheets have been used, the blue check means that the item has already been added to the story. There are a lot of ways to add additional points to a story. Let's go through some of the options: First, dragging a piece of content to the "Add a New Point" box. This box only shows when we click and are holding a piece of content. We'll highlight Critical orders and update. We can also add content by using the "New Blank Point" button next to the navigator. Double clicking a piece of content brings it into the story. We'll highlight Medium this time, and click update

As a note, if we bring out the wrong thing, simply dragging out a different sheet will replace it. Hovering over a navigator box also brings up the delete button. To bring out a sheet out to a specific position, we could drag it to the navigator until we see a blue arrow, like so. We'll click the Standard Class Shipping column header and update.

If we want to display more than one visualization on a single point, we have to bring them out as a dashboard.

Fitting Visualizations in Stories

What happens when we bring out a dashboard? Here, because we changed the default size of our story, the dashboard doesn't look good when it's nested. To easily fix the sizing, go to the underlying dashboard by clicking on this "go to sheet" icon and then we'll set the size as to "Fit to Story". Now back on the story, now it fits perfectly.

Similarly, if it's a visualization that doesn't fit well on the story, we can go back to the sheet by clicking the icon and changing the fit. Entire View generally works pretty well. On the Story, we see that the viz now fills the space.

Updating the Underlying Sheet

It's worth noting that most changes on the original sheets are reflected in the Story Points – and changes to how the viz displays need to be made on the underlying sheet itself. Here, we can hide the color legend and keep only some of the data. Back the Story, we see that color legend is gone, and we're only looking at that selection of data.

Rearranging Content

If we need to rearrange content, it's a simple drag and drop in the navigator to change the order. Click and hold on a box then move it to where it needs to be. The blue arrow indicates where the point will go when the mouse button is released.

Annotating with Descriptions

Now that we have our basic points, what if we want the audience to know that they can interact with this first map? To annotate the story, we simply add a description by dragging it out. This is a fully editable text box.

The default background color is yellow, but that can be changed by going to the Story menu and selecting Format. Here we can control various aspects of the Story's formatting, default shading, aspects of the title. We can change various aspects of navigator box, such as color and font, and we can control the descriptions.

Navigation and Title

As a finishing touch, checking or unchecking this box toggles the back and forward buttons on the navigator. We can also turn on or off the Story Title, which is editable as a rich text item.

Conclusion

Thank you for watching this Story Points training video. We invite you to continue with the Free Training videos to learn more about using Tableau.