Walkthrough Tableau Desktop

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1. Where can I find information?

As a student, you can access for free information in the **Tableau eLearning center (**https://elearning.tableau.com/**)** .
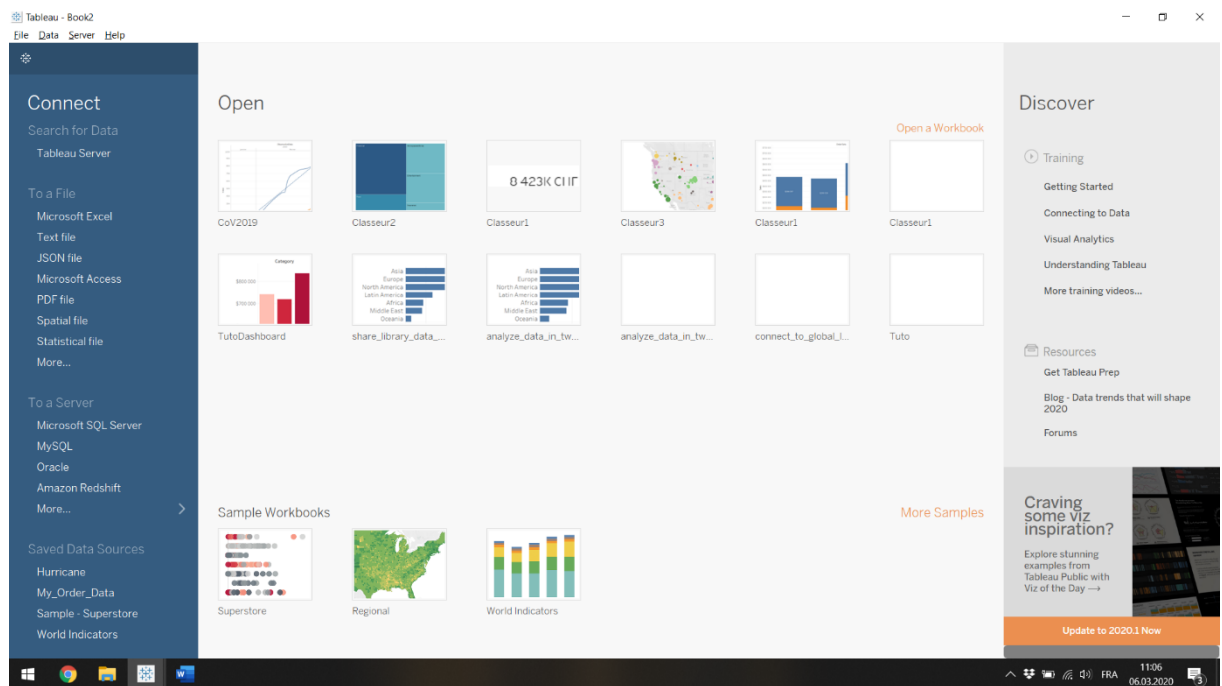This website provide you short videos with examples on how you can perform something.

2. How to start?

Today we're going to do a Walkthrough in **Tableau desktop**. We're going to do it with a standard dataset provided by **Tableau** named *Sample Superstore.*

2.1 Open Tableau desktop

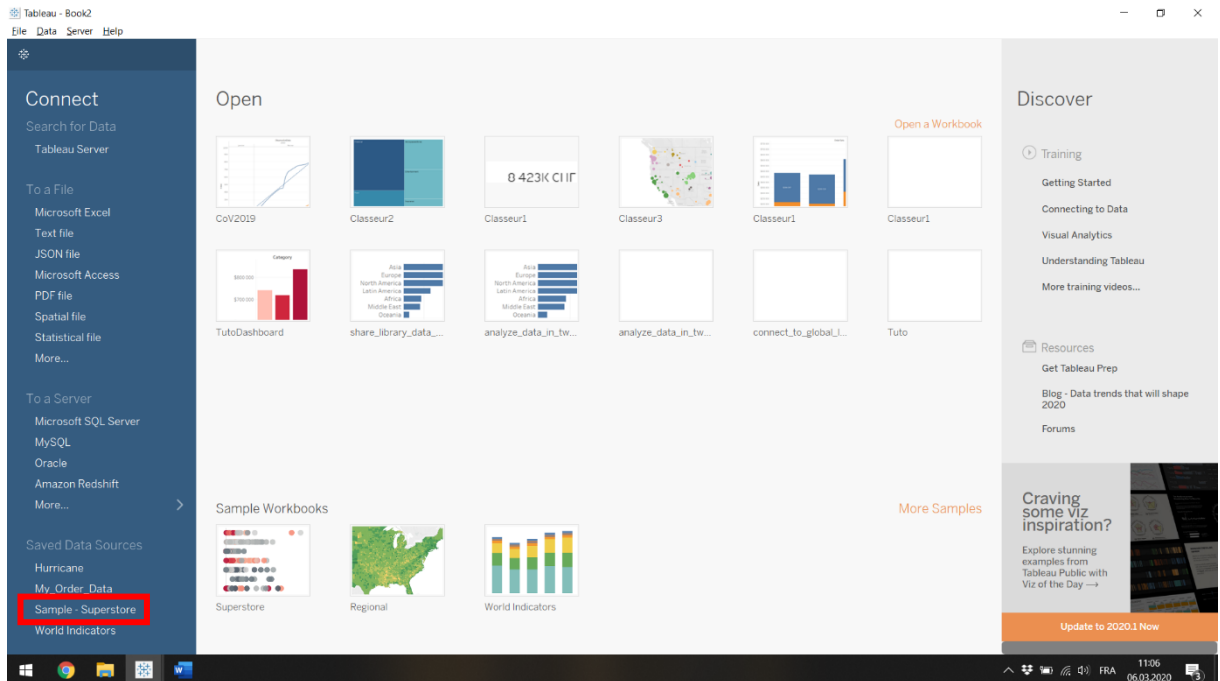When you open **Tableau desktop**, you're going to see this view:

In the left side of the screen, you're going to see all the possibilities to connect with data. Basically, you're able to connect with:

- **Files** (excel, text, JSON, Access, PDF, …)
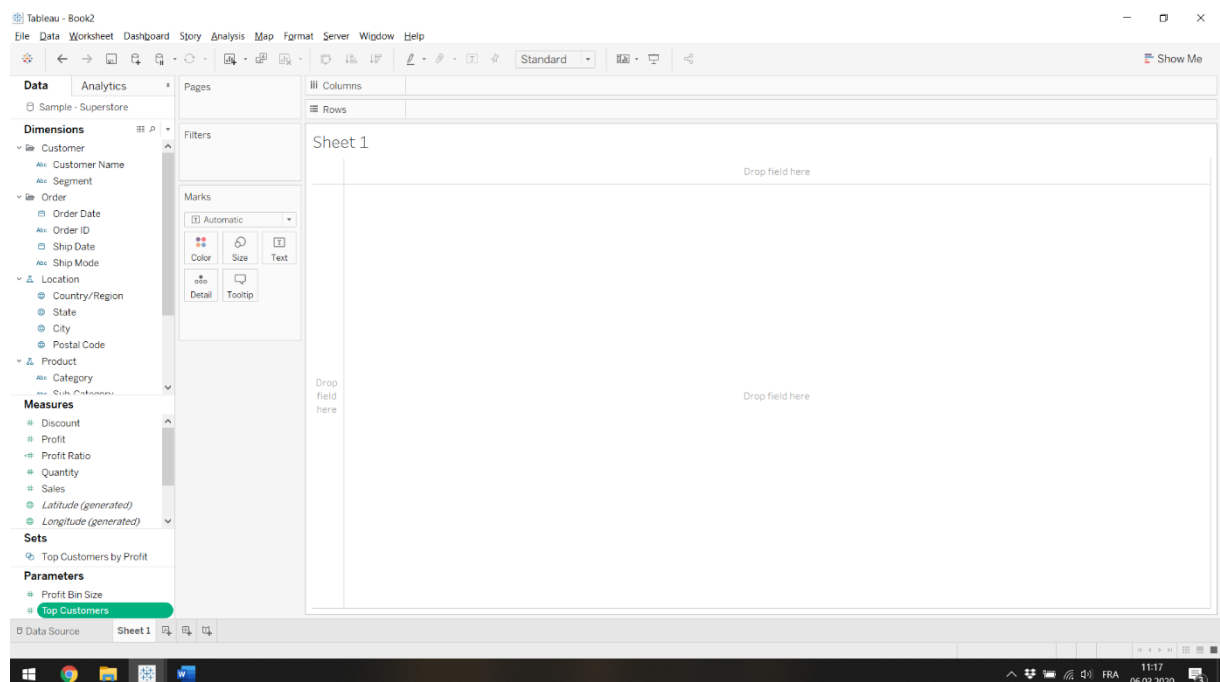- **Servers** (Microsoft SQL servers, Oracle, MySQL server, …)

In the center of the screen upper part, you're going to find your last **Workbook**. In the lower part, some examples provided by Tableau.
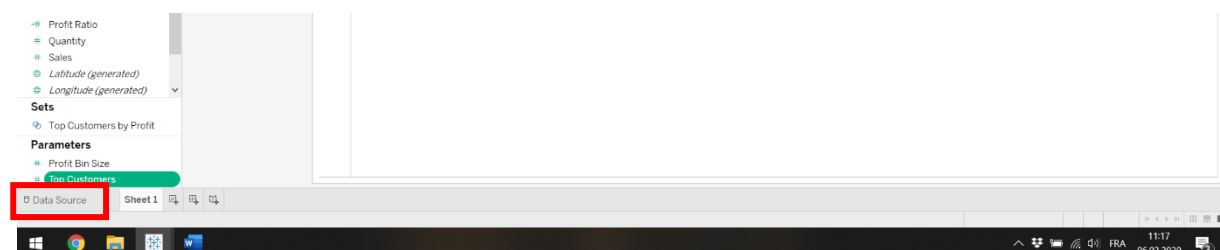
2.2 Load the data

For starting let's double click on the **"Sample – Superstore".**

It opens you the following view:

The click on the *"Data Source"* worksheet to have a look on the data:

2.3 Data Source

2.3.1 General information

When you open the worksheet *"**Data Source**"*, you will see the following view:

Let's describe a bit what we see.

The orange part is the data sheets. Basically, you can interpret it as table in a relational database.

The blue part is the data selection. It's basically which table you select

The green part is the row and column that compose the table.

2.3.2 Types of data

If we zoom on **the green** part, we can see:

- The names of columns
- The types of the values (number, string, Boolean, Dates, …)
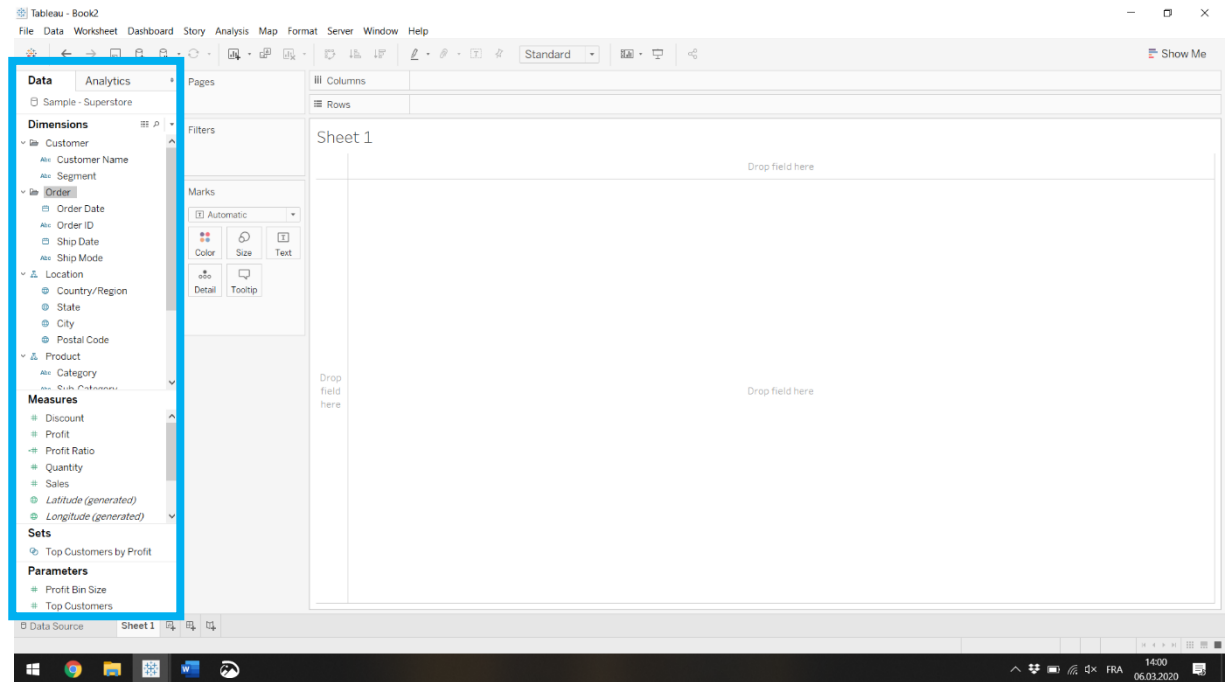

If needed, it's possible to change **the type** of values by clicking on them.

3. My first charts

Let's go to the **"Sheet 1"**.

The blue part gives you the "**Dimensions"** and the "**Measures"**.

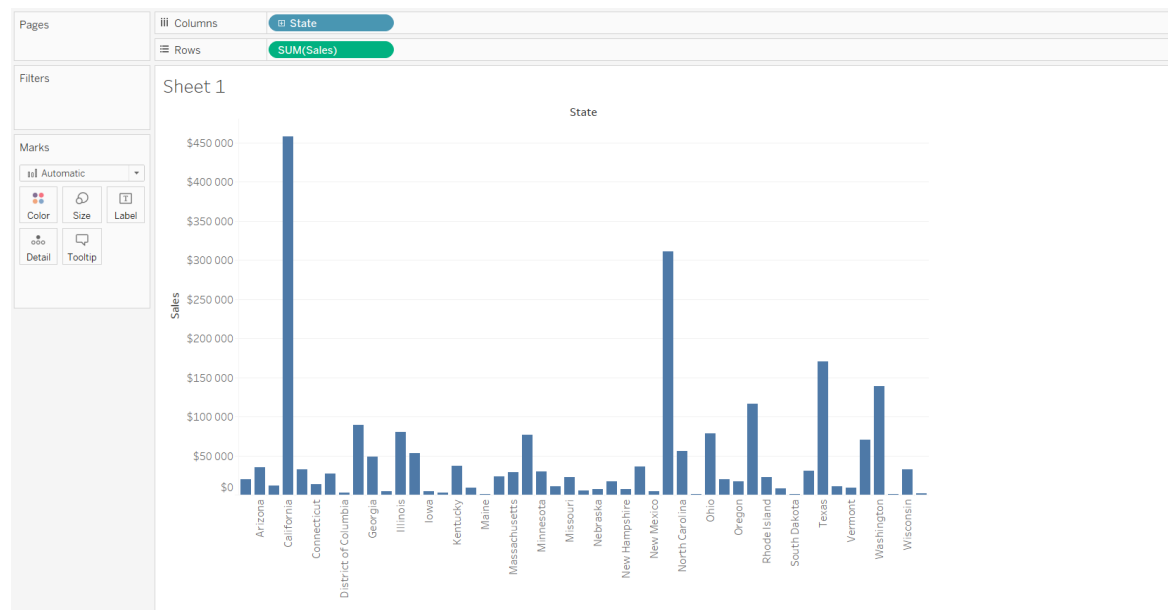The **dimensions** are categorical, and you normally want to group some information by **dimensions.**

The **measures**, most of the time, are aggregative values.

To manipulate the dimensions or the measures, you drag and drop them to the "Columns" and "Rows" area.
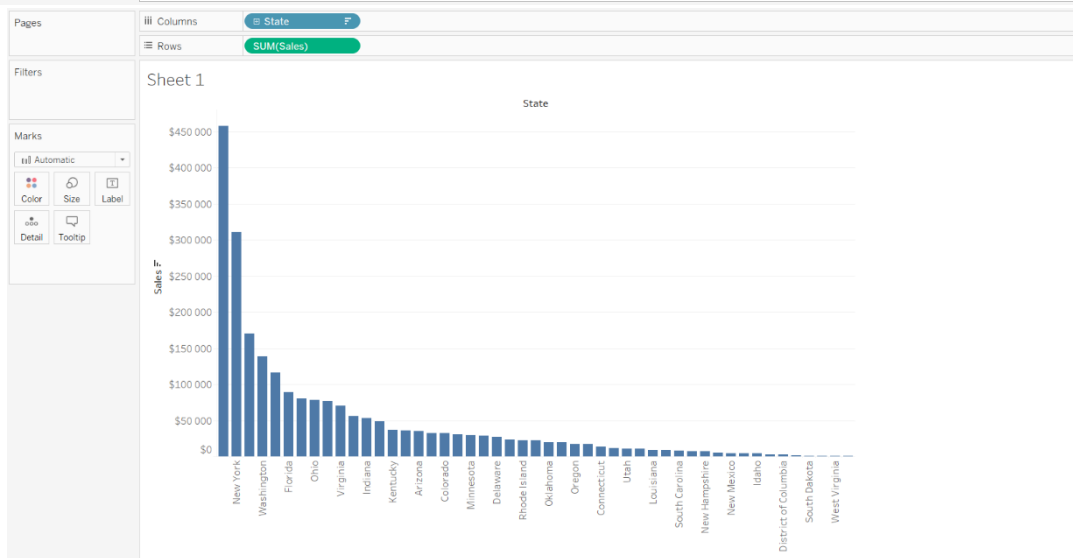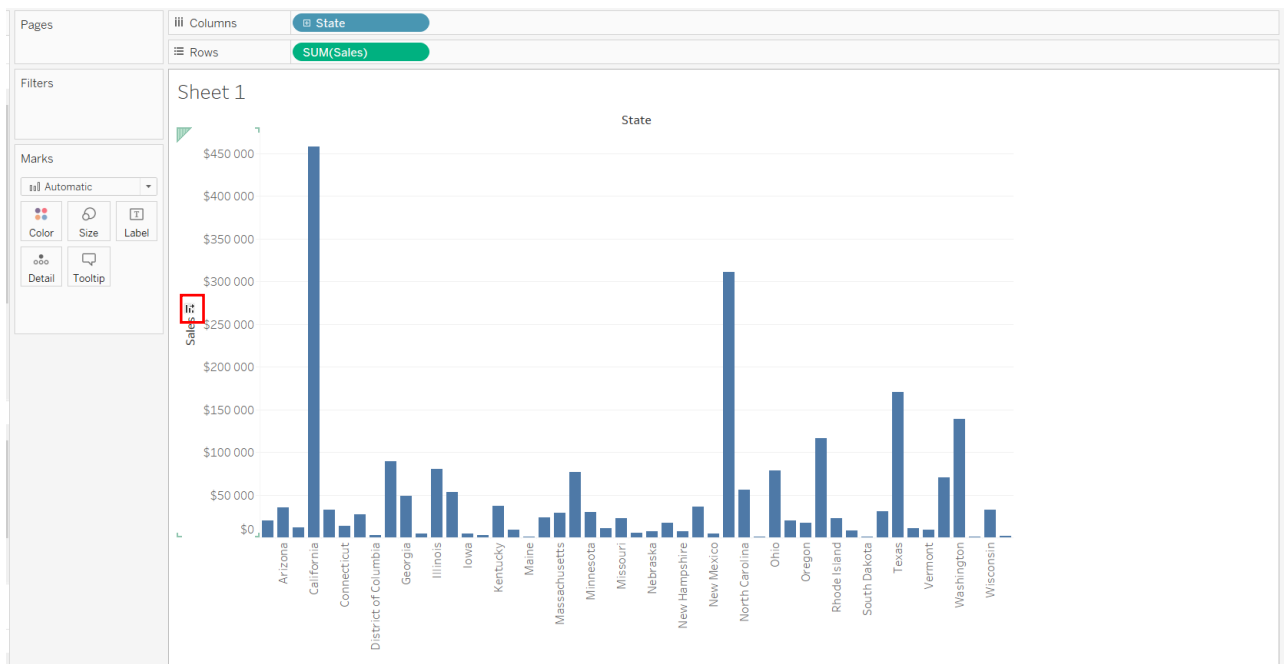
3.1 Bar chart

Our first chart will respond to the visualize:
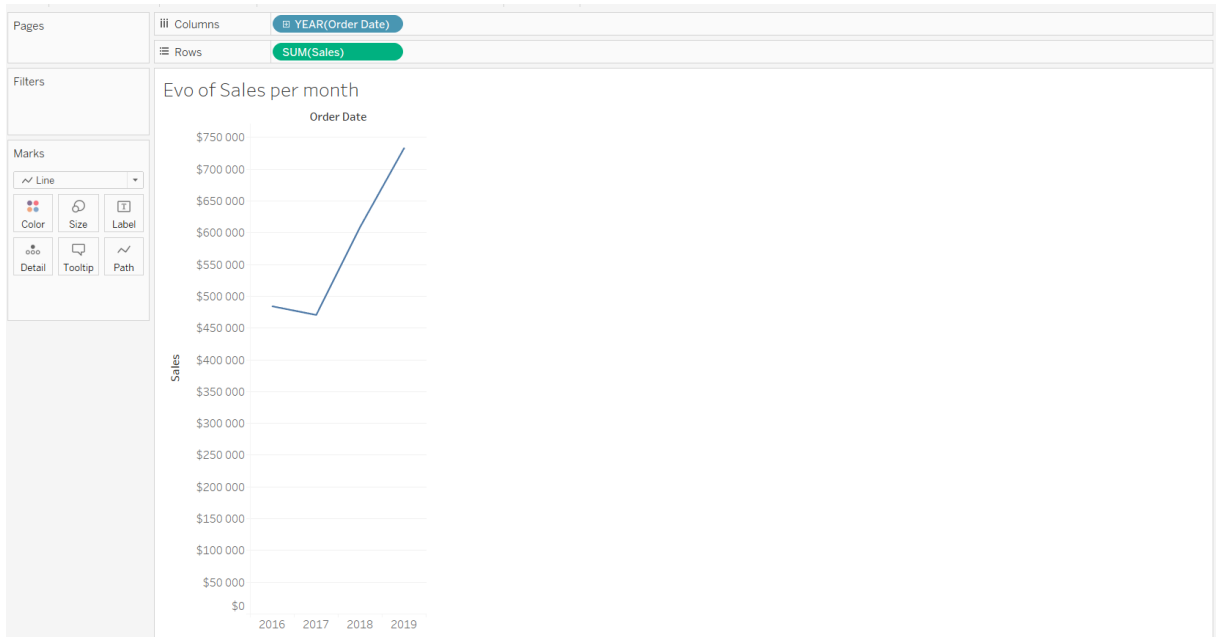
"The amount of sales by state".

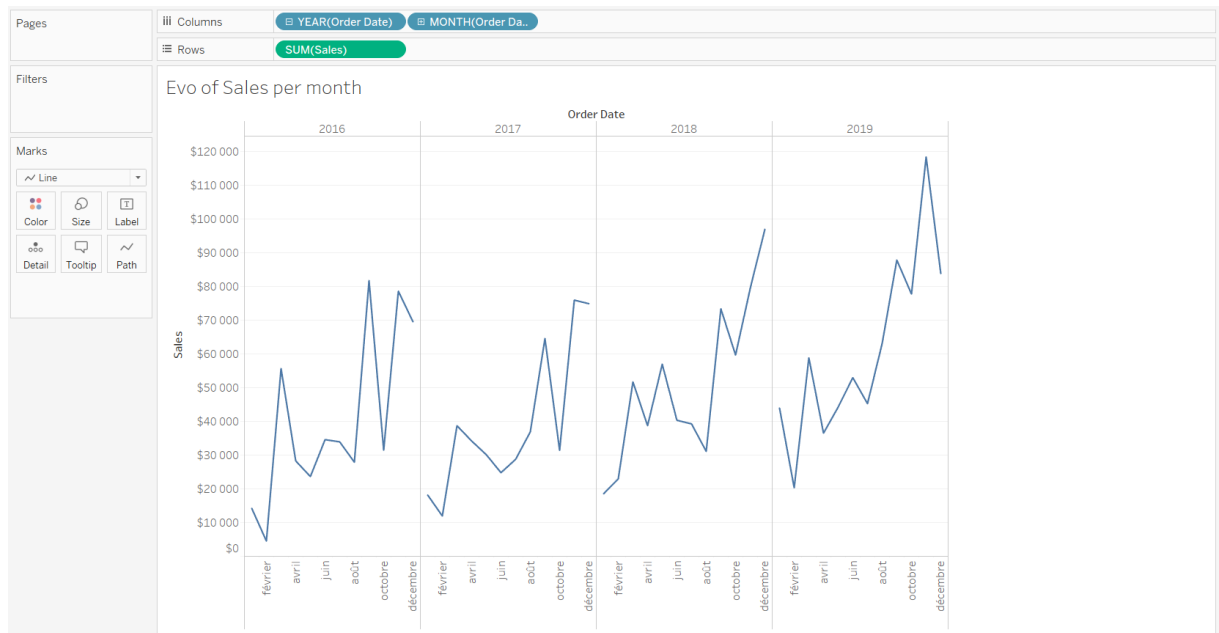Then we want to order them descending. Click here!

3.2 Line Chart

The following line chart has for objective to show the evolution of sales by month in the previous years.
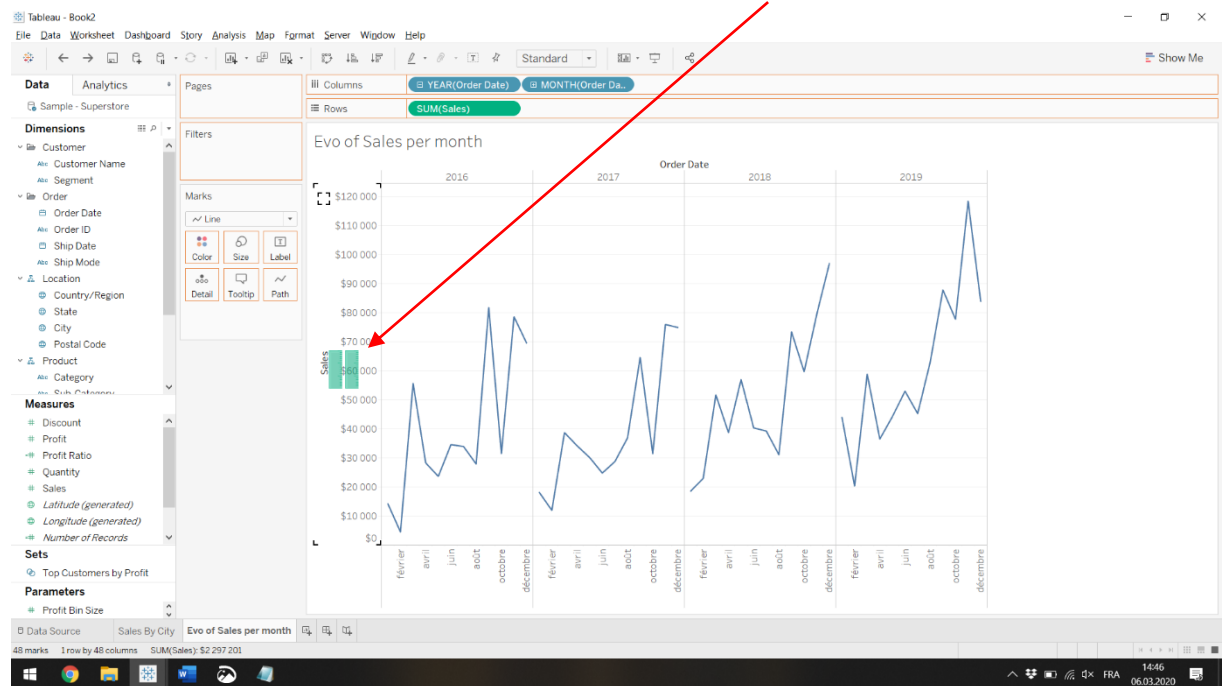

Then click on the small "+" on "the years" and then in "the quarter". Then drag and drop out "quarter" to finish with a chart like this one.
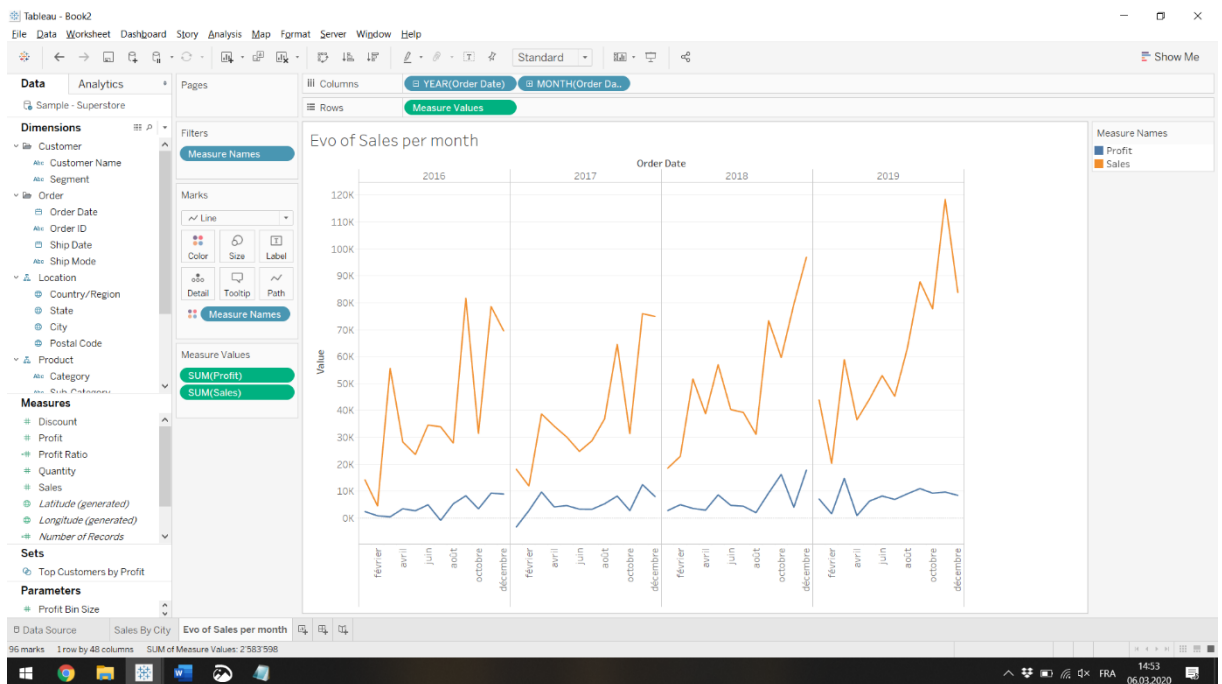
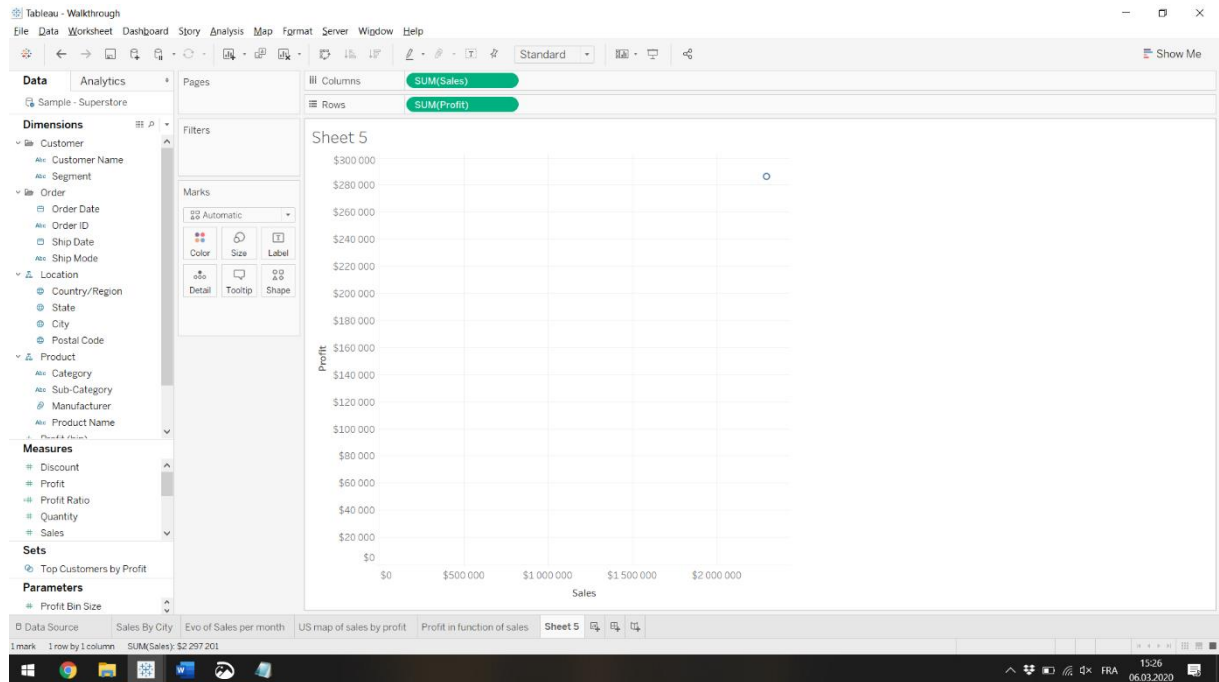Let's add the curve of profit. For this drag and drop **"Profit" at this place.**
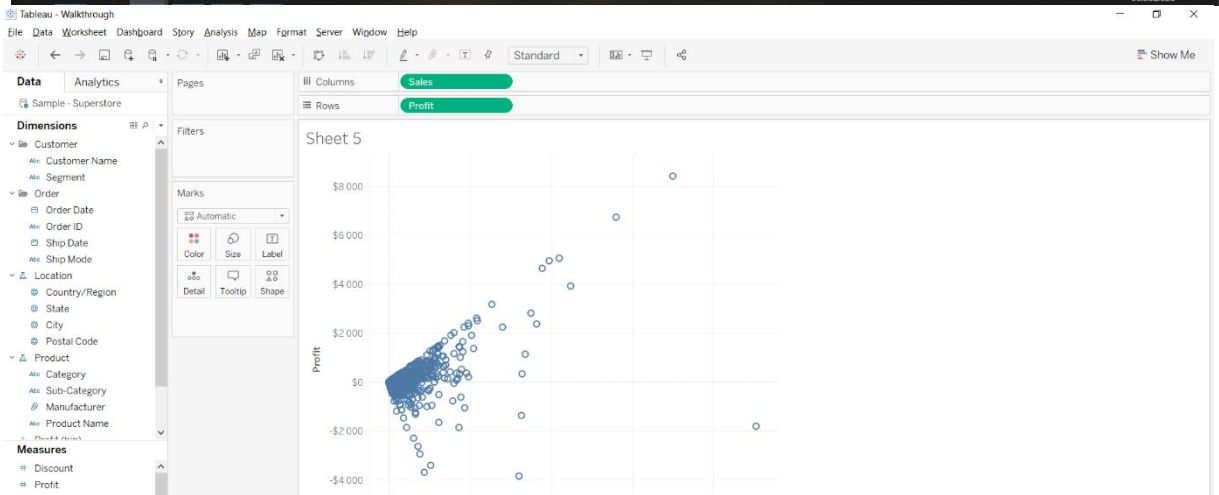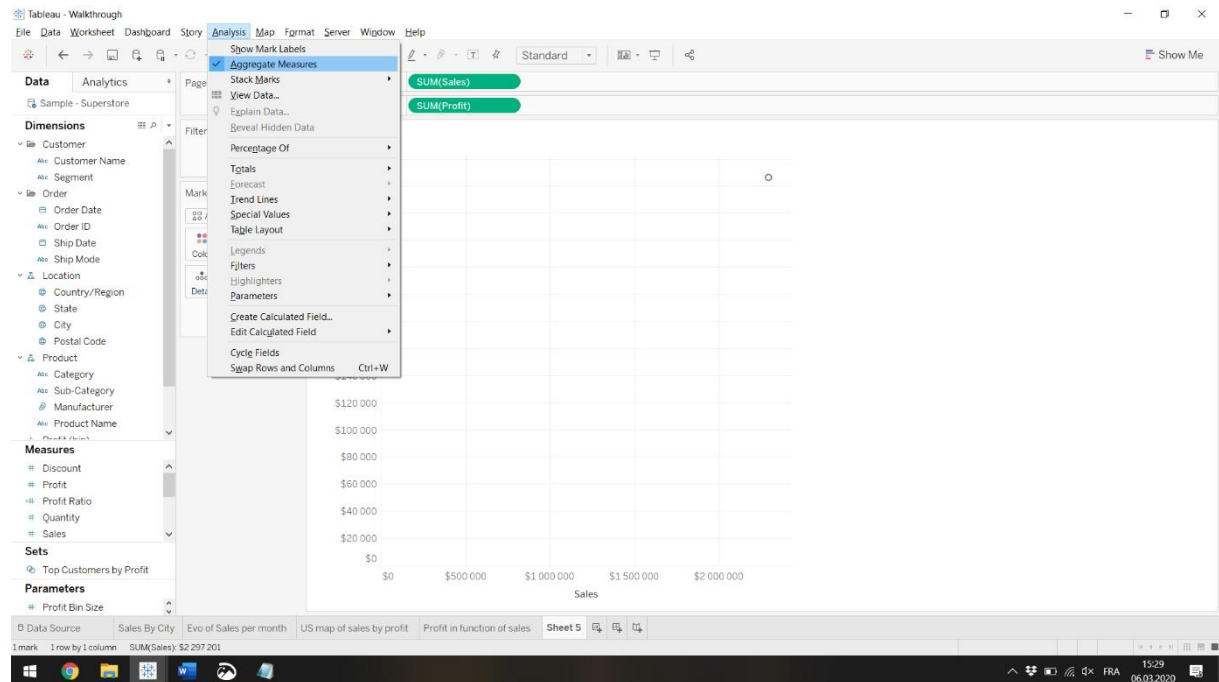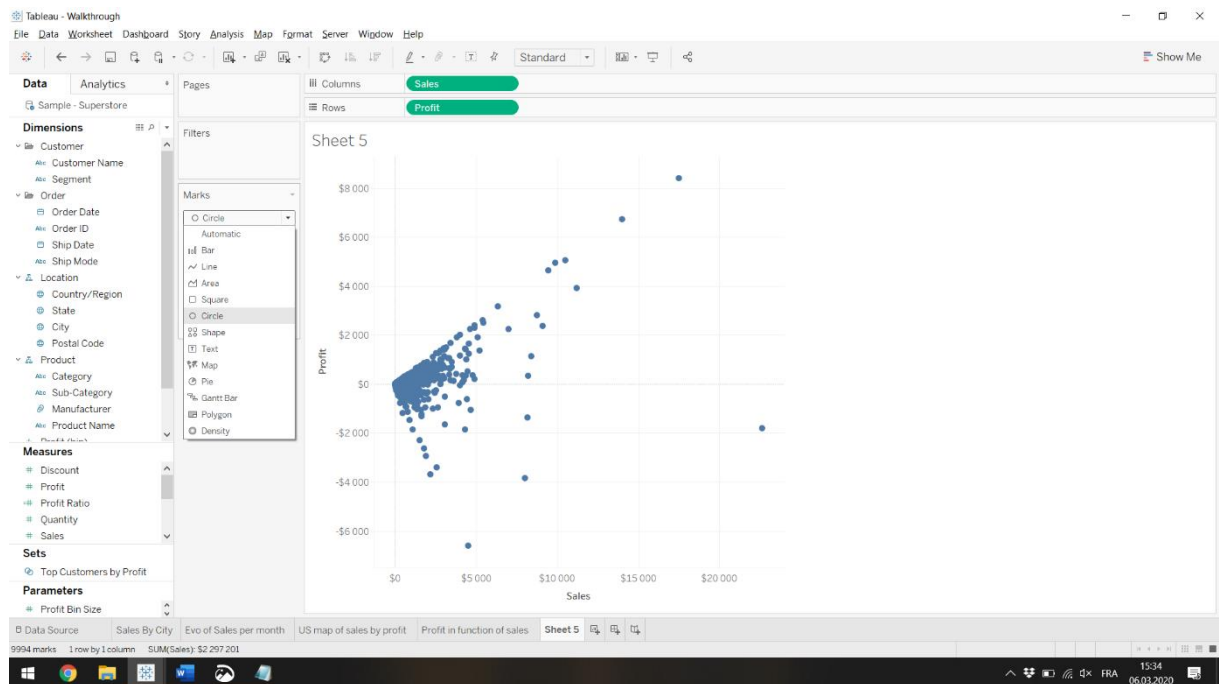

Then we plot the **"Profit".**

3.3 Scatter plot

The scatter plot we're going to do is based **on Profit in function of Sales**.
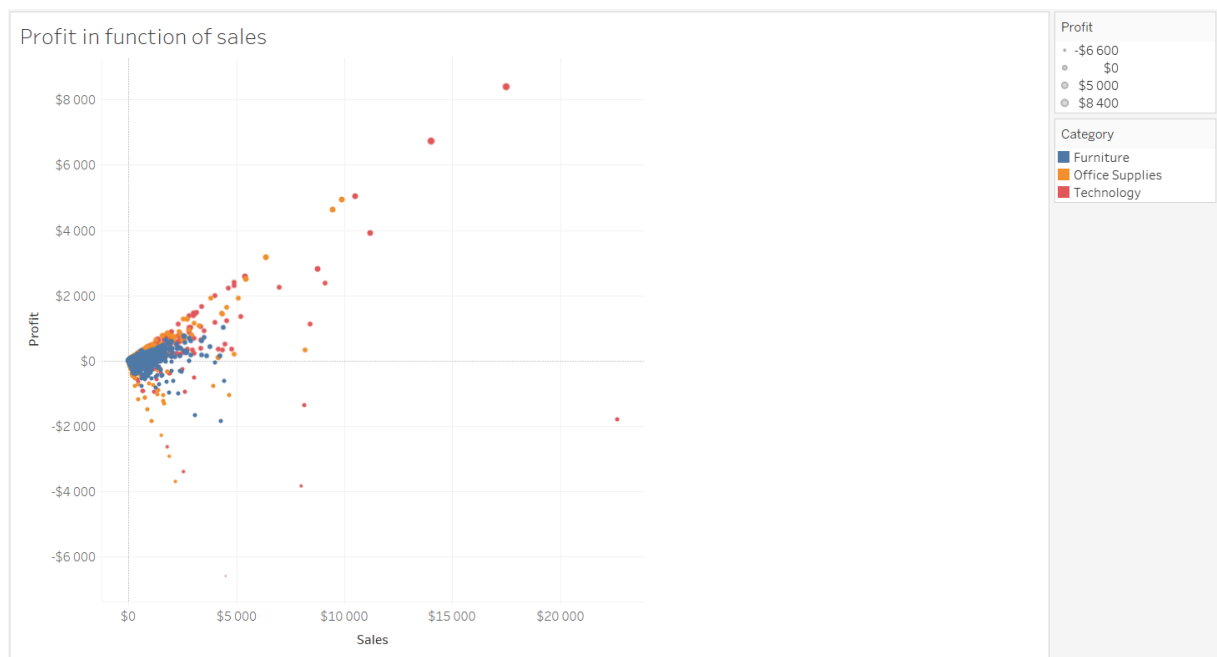

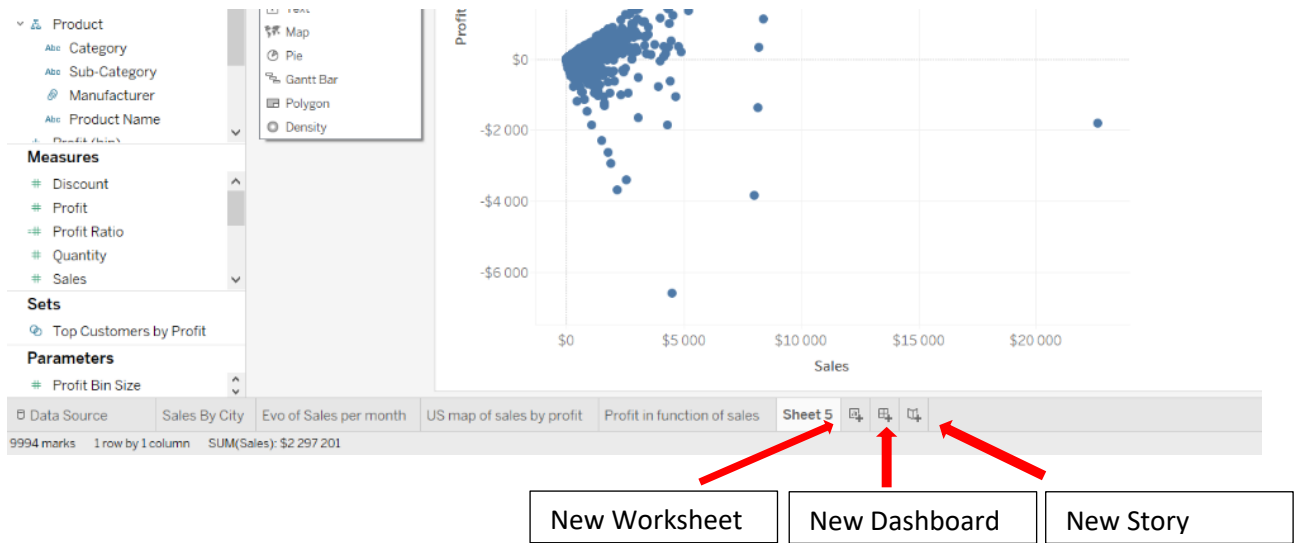Click on **Analysis >> Aggregate Measures.**

Click on **"Circle".**

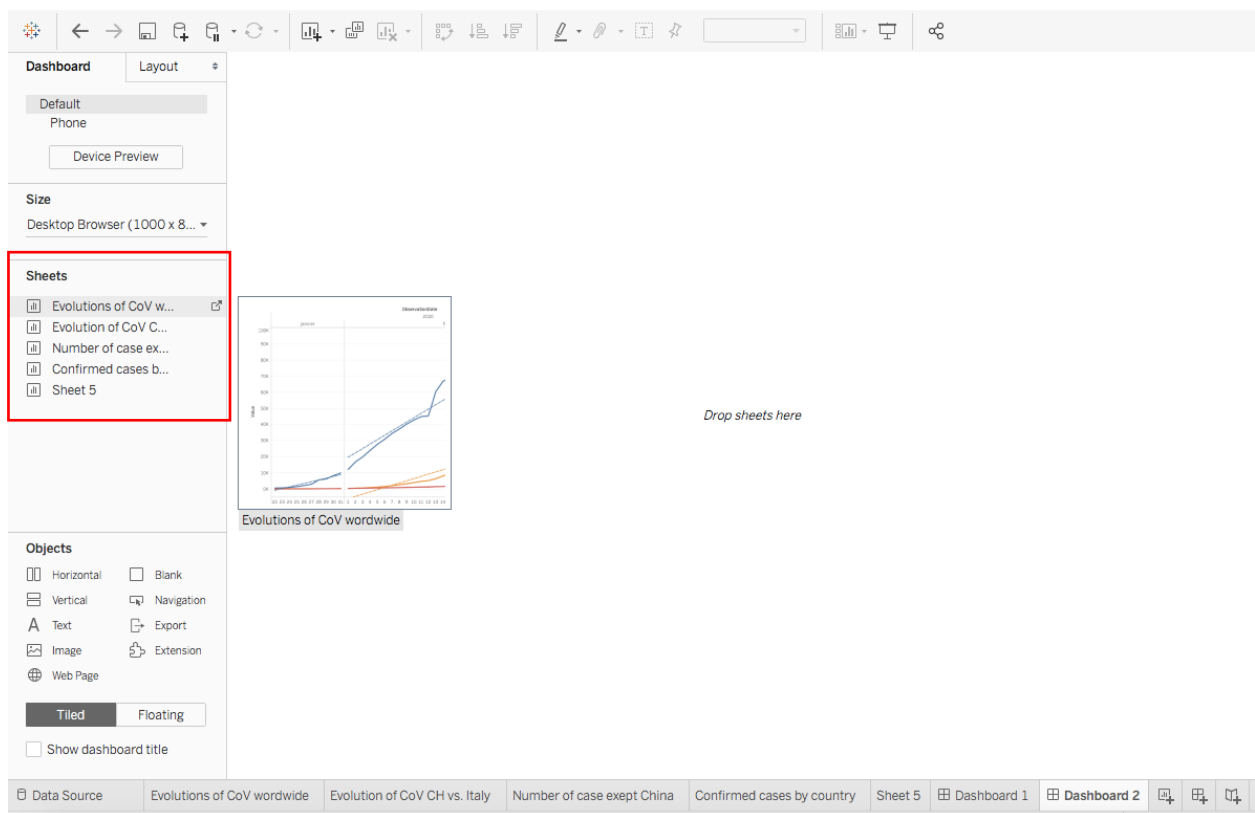# 4. Small exercise 5 minutes

Let's try to create the following graph:

5. Dashboards

To create the graphs above we have always clicked on the first little icon on the bottom. We will now click on the second one ("New Dashboard").
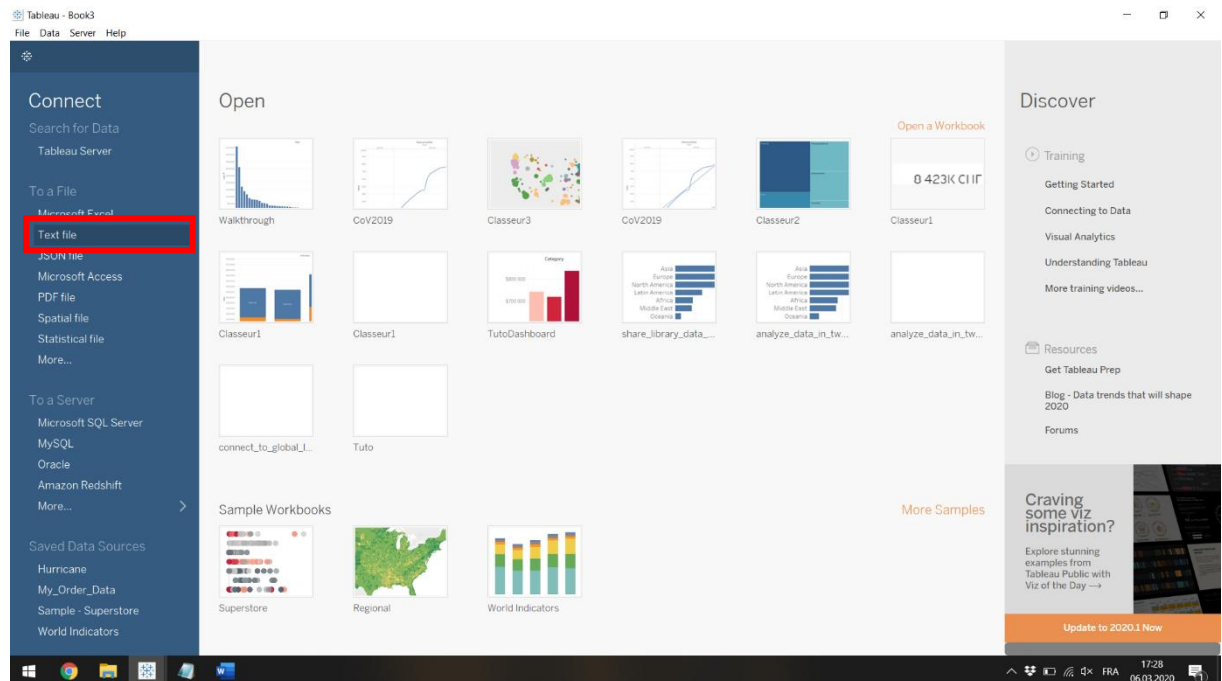

To create a dashboard you can just drag and drop to the dashboard the graphs that you want to add. You can choose among the sheets that you have created before. Then you can move them and adjust your dashboard as you want.
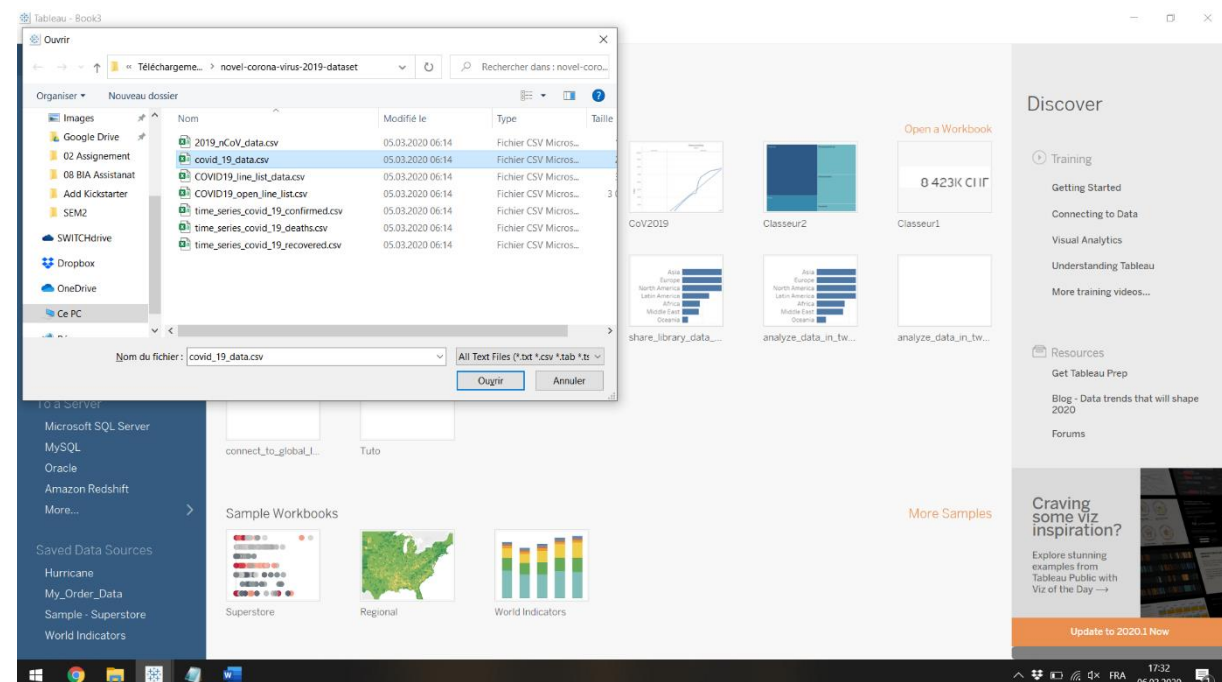
6. How to load a CSV (text file): how to start the exercises part
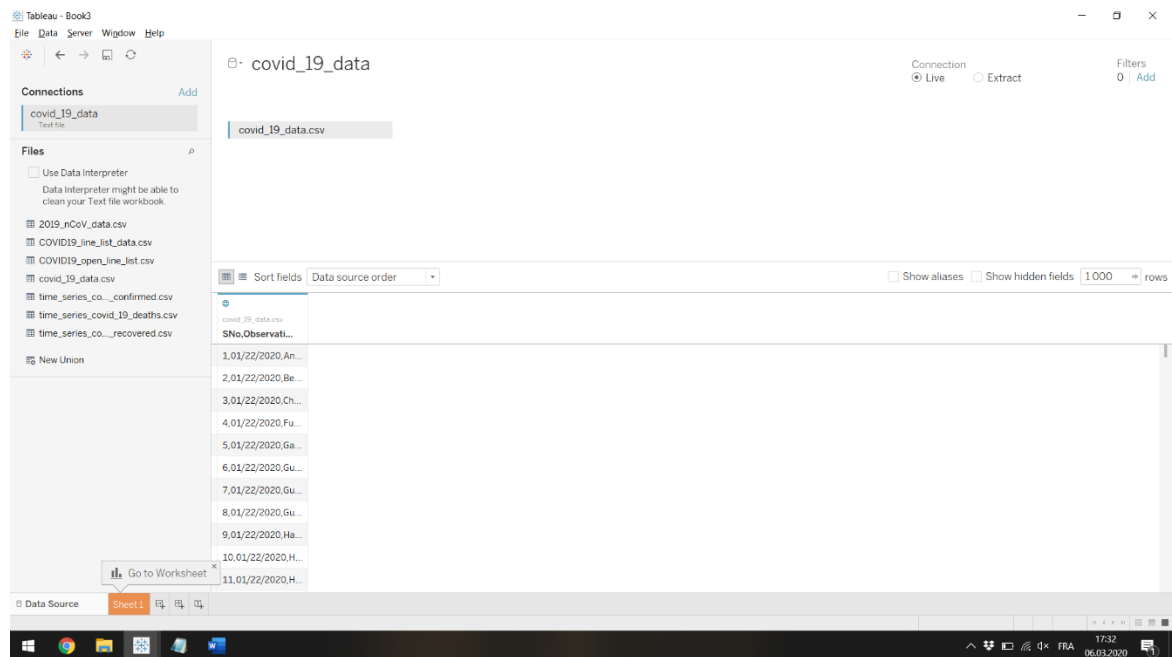
Few steps to start the exercises part.

When you're on the main page, click on **"Text File"**

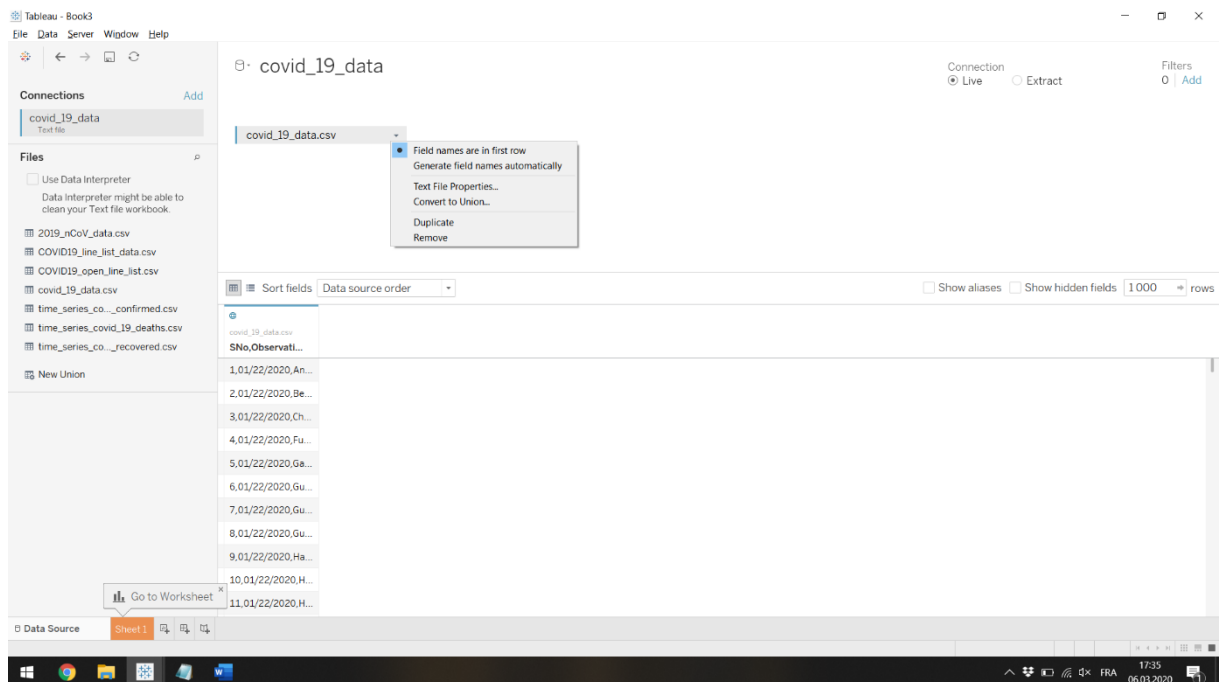Load in tableau the file name: **"covid_19_data.csv"**

Maybe you're going to have the following issue in the **"Data Source"** worksheet:

To fixe it do the following:

1. Click on the arrow at the right of the data set

2. Then on **text file properties**:

3. Then on **"field separato**r" choose **"Coma"** and in **"Local"** choose **"English (United States)**

And now you're ready to start the exercise 😉