

# 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/>)

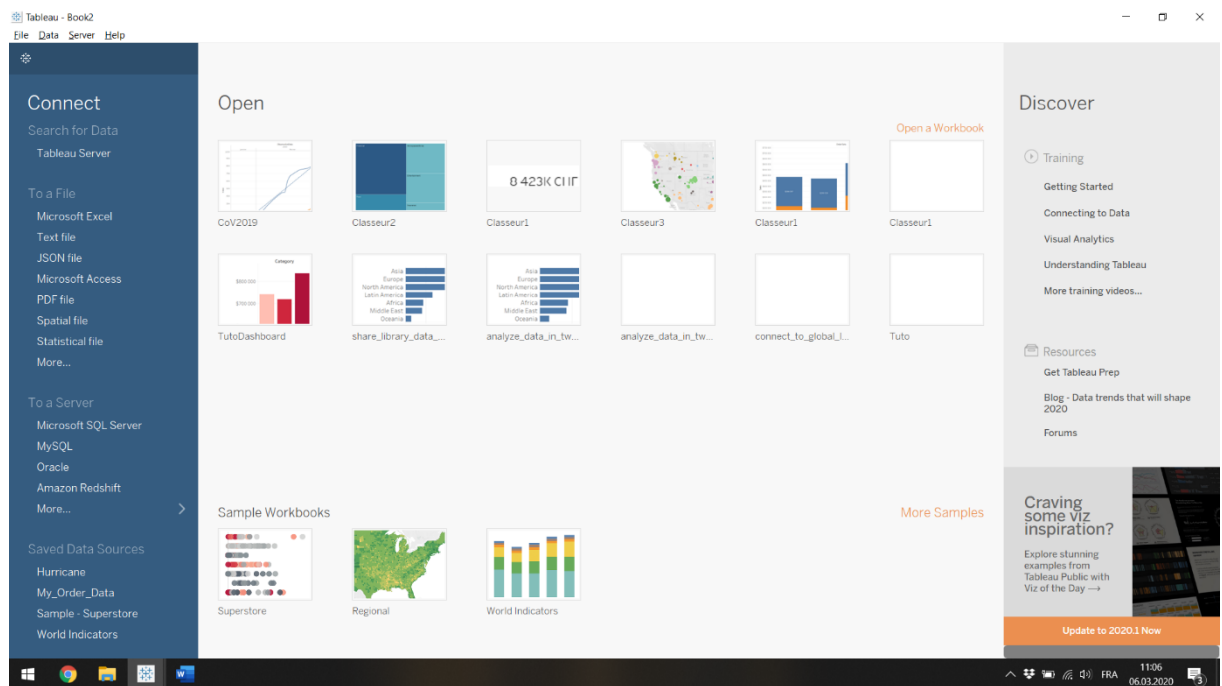
This website provide you short videos with examples on how you can perform something.

## 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:



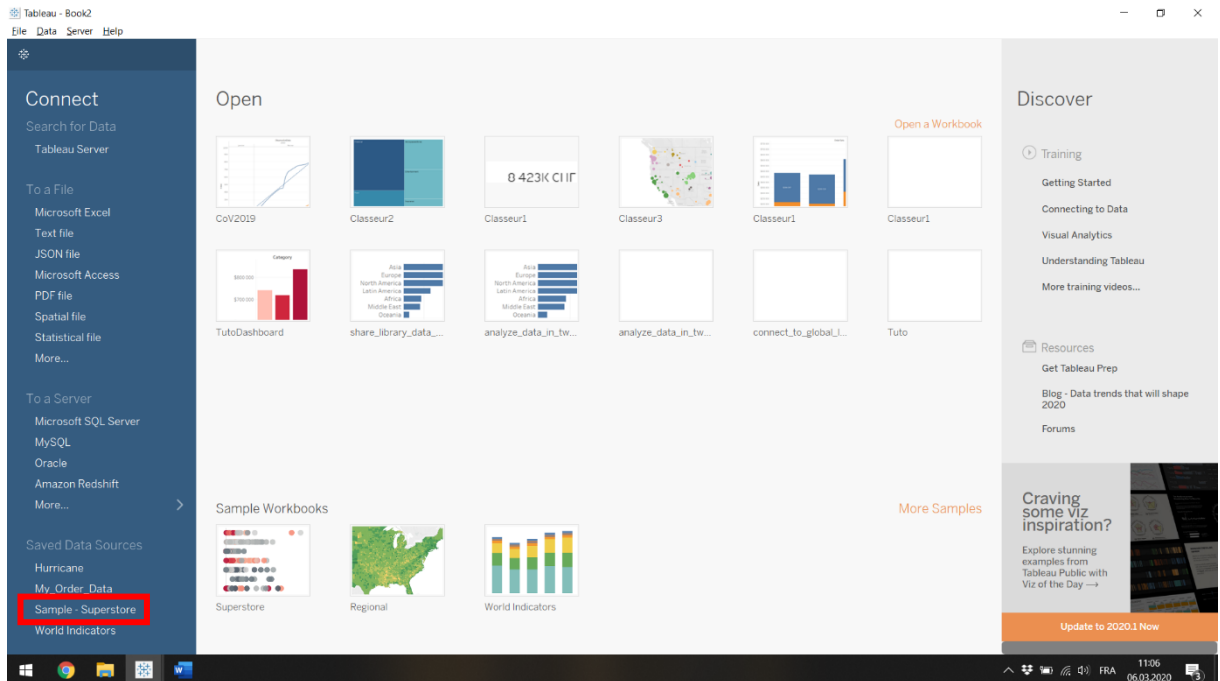
In the left side of the screen, you're going to see all the possibilities to connect with data. Basically, you're able to connect with:

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

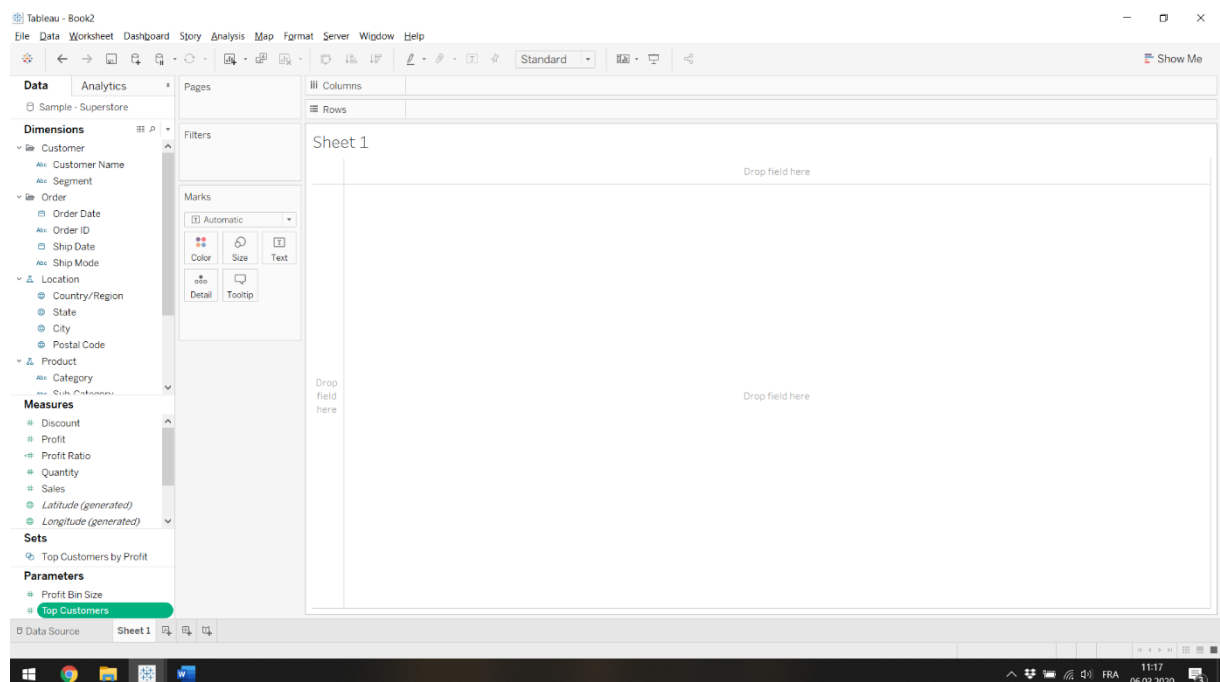
In the center of the screen upper part, you're going to find your last **Workbook**. In the lower part, some examples provided by Tableau.

## 2.2 Load the data

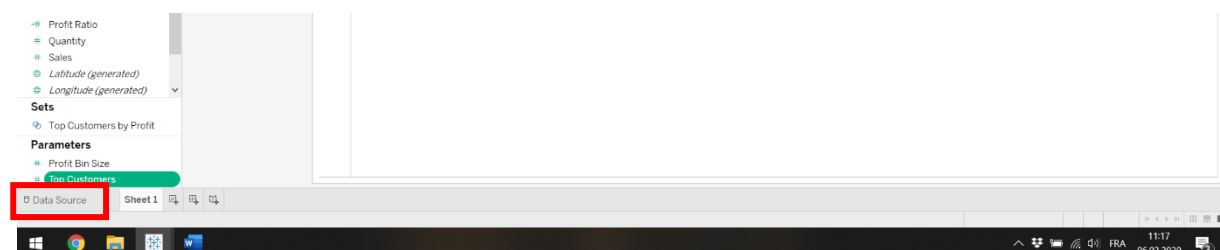
For starting let's double click on the **"Sample – Superstore"**.



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:

Tableau - Book2

File Data Server Window Help

Connections Add

Sample - Superstore  
Microsoft Excel

Sheets P

☐ Use Data Interpreter  
Data Interpreter might be able to clean your Microsoft Excel workbook.

Orders  
People  
Returns  
Orders  
People  
Returns  
New Union

Sample - Superstore

Orders

Connection ☒ Live ☐ Extract Filters 0 | Add

Sort fields Data source order Show aliases Show hidden fields 1 000 rows

Order ID	Order Date	Ship Date	Ship Mode	Customer Name	Segment	Country/Region	City	State	Postal Code	Region	Category
CA-2018-152156	08.11.2018	11.11.2018	Second Class	Claire Gute	Consumer	United States	Henderson	Kentucky	42420	South	Furniture
CA-2018-152156	08.11.2018	11.11.2018	Second Class	Claire Gute	Consumer	United States	Henderson	Kentucky	42420	South	Furniture
CA-2018-138688	12.06.2018	16.06.2018	Second Class	Darrin Van Huff	Corporate	United States	Los Angeles	California	90036	West	Office Supp
US-2017-108966	11.10.2017	18.10.2017	Standard Class	Sean O'Donnell	Consumer	United States	Fort Lauderdale	Florida	33311	South	Furniture
US-2017-108966	11.10.2017	18.10.2017	Standard Class	Sean O'Donnell	Consumer	United States	Fort Lauderdale	Florida	33311	South	Office Supp
CA-2016-115812	09.06.2016	14.06.2016	Standard Class	Brosina Hoffman	Consumer	United States	Los Angeles	California	90032	West	Furniture
CA-2016-115812	09.06.2016	14.06.2016	Standard Class	Brosina Hoffman	Consumer	United States	Los Angeles	California	90032	West	Office Supp
CA-2016-115812	09.06.2016	14.06.2016	Standard Class	Brosina Hoffman	Consumer	United States	Los Angeles	California	90032	West	Technology
CA-2016-115812	09.06.2016	14.06.2016	Standard Class	Brosina Hoffman	Consumer	United States	Los Angeles	California	90032	West	Office Supp
CA-2016-115812	09.06.2016	14.06.2016	Standard Class	Brosina Hoffman	Consumer	United States	Los Angeles	California	90032	West	Office Supp
CA-2016-115812	09.06.2016	14.06.2016	Standard Class	Brosina Hoffman	Consumer	United States	Los Angeles	California	90032	West	Office Supp

Data Source Sheet 1

Let's describe a bit what we see.

Tableau - Book2

File Data Server Window Help

Connections Add

Sample - Superstore  
Microsoft Excel

Sheets P

☐ Use Data Interpreter  
Data Interpreter might be able to clean your Microsoft Excel workbook.

Orders  
People  
Returns  
Orders  
People  
Returns  
New Union

Sample - Superstore

Orders

Connection ☒ Live ☐ Extract Filters 0 | Add

Sort fields Data source order Show aliases Show hidden fields 1 000 rows

Order ID	Order Date	Ship Date	Ship Mode	Customer Name	Segment	Country/Region	City	State	Postal Code	Region	Category
CA-2018-152156	08.11.2018	11.11.2018	Second Class	Claire Gute	Consumer	United States	Henderson	Kentucky	42420	South	Furniture
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US-2017-108966	11.10.2017	18.10.2017	Standard Class	Sean O'Donnell	Consumer	United States	Fort Lauderdale	Florida	33311	South	Office Supp
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CA-2016-115812	09.06.2016	14.06.2016	Standard Class	Brosina Hoffman	Consumer	United States	Los Angeles	California	90032	West	Technology
CA-2016-115812	09.06.2016	14.06.2016	Standard Class	Brosina Hoffman	Consumer	United States	Los Angeles	California	90032	West	Office Supp
CA-2016-115812	09.06.2016	14.06.2016	Standard Class	Brosina Hoffman	Consumer	United States	Los Angeles	California	90032	West	Office Supp

Data Source Sheet 1

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, ...)

Tableau - Book2

File Data Server Window Help

Connections

Sample - Superstore (Microsoft Excel)

Sheets

Use Data Interpreter  
Data Interpreter might be able to clean your Microsoft Excel workbook.

Orders

People

Returns

Orders

People

Returns

New Union

Sample - Superstore

Orders

Connection: Live Extract

Filters: 0 Add

Sort fields: Data source order

Show aliases Show hidden fields 1000 rows

Order ID	Order Date	Ship Date	Ship Mode	Customer Name	Segment	Country/Region	City	State	Postal Code	Region	Category
CA-2018-152156	08.11.2018	11.11.2018	Second Class	Claire Gute	Consumer	United States	Henderson	Kentucky	42420	South	Furniture
CA-2018-152156	08.11.2018	11.11.2018	Second Class	Claire Gute	Consumer	United States	Henderson	Kentucky	42420	South	Furniture
CA-2018-138688	12.06.2018	16.06.2018	Second Class	Darrin Van Huff	Corporate	United States	Los Angeles	California	90036	West	Office Supp
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US-2017-108966	11.10.2017	18.10.2017	Standard Class	Sean O'Donnell	Consumer	United States	Fort Lauderdale	Florida	33311	South	Office Supp
CA-2016-115812	09.06.2016	14.06.2016	Standard Class	Brosina Hoffman	Consumer	United States	Los Angeles	California	90032	West	Furniture
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CA-2016-115812	09.06.2016	14.06.2016	Standard Class	Brosina Hoffman	Consumer	United States	Los Angeles	California	90032	West	Technology
CA-2016-115812	09.06.2016	14.06.2016	Standard Class	Brosina Hoffman	Consumer	United States	Los Angeles	California	90032	West	Office Supp
CA-2016-115812	09.06.2016	14.06.2016	Standard Class	Brosina Hoffman	Consumer	United States	Los Angeles	California	90032	West	Office Supp

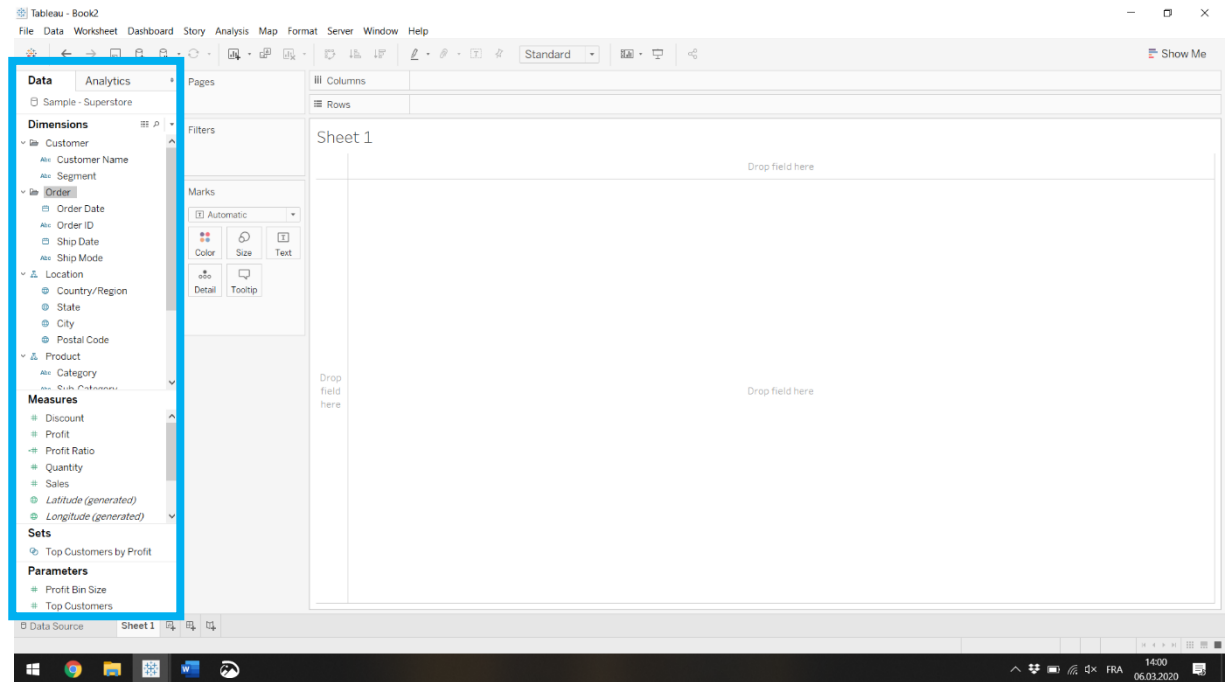
Data Source Sheet1

13:45 06.03.2020

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**.

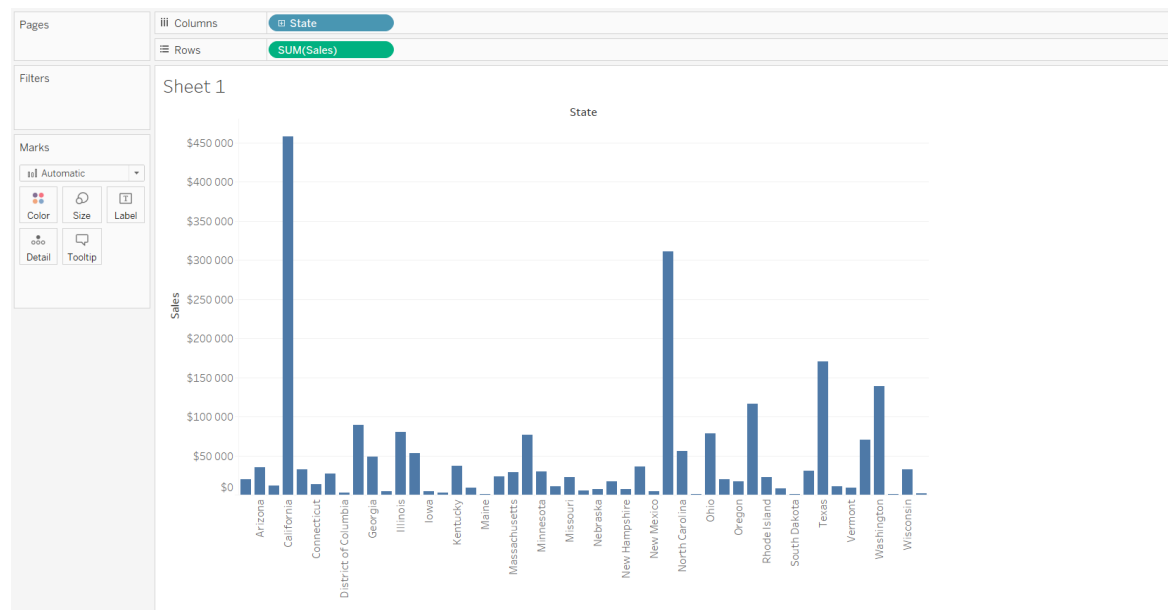
The **measures**, most of the time, are aggregative values.

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

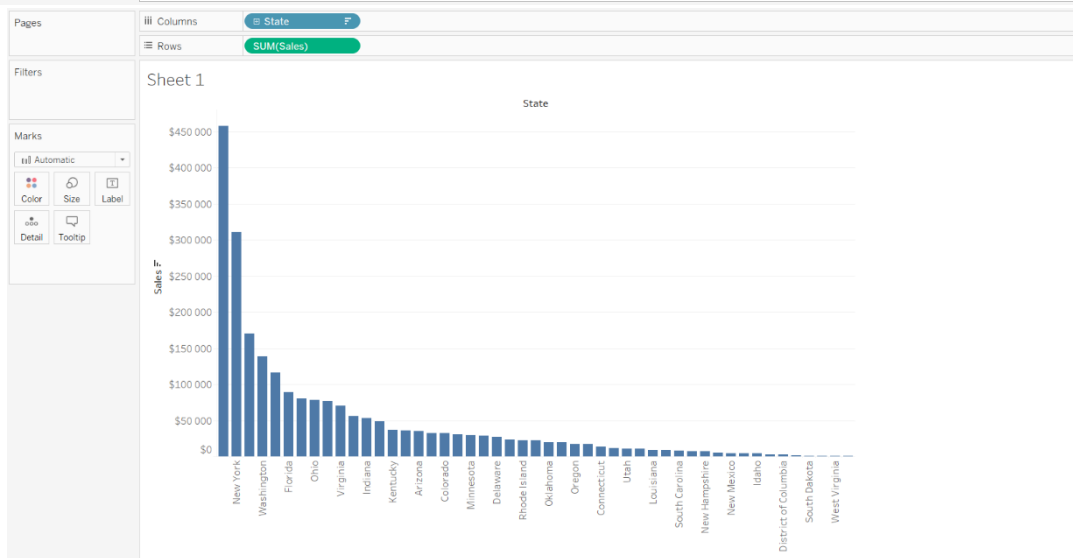
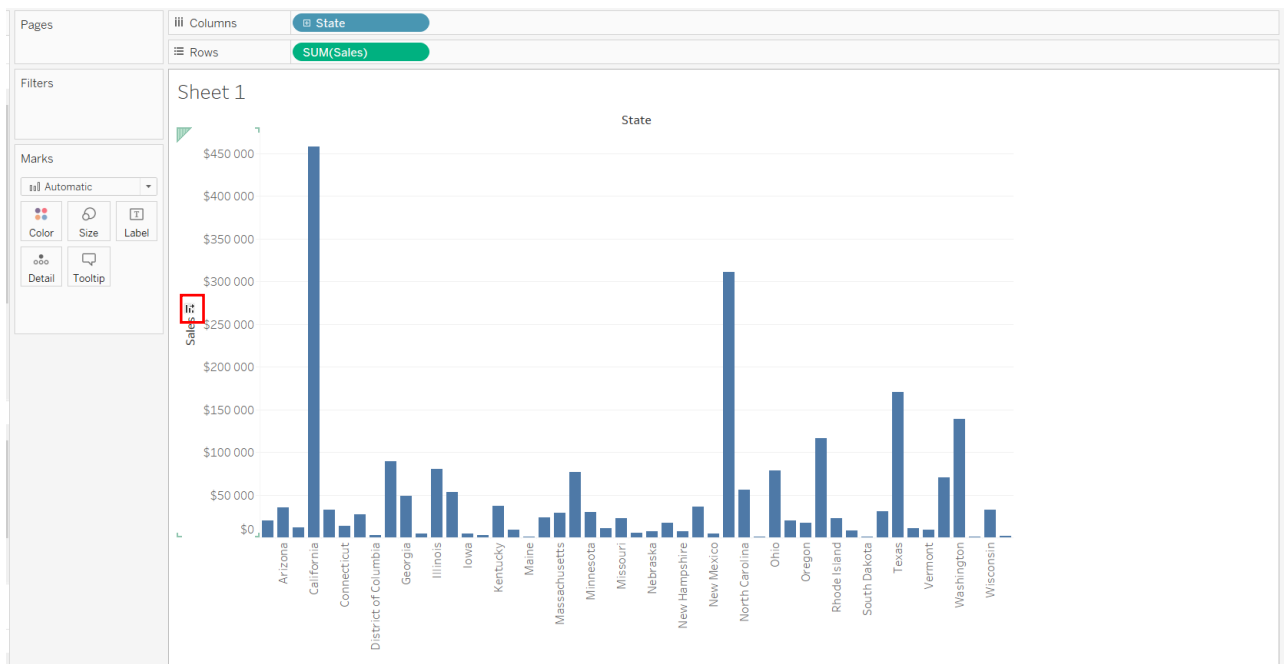
### 3.1 Bar chart

Our first chart will respond to the visualize:

**“The amount of sales by state”.**

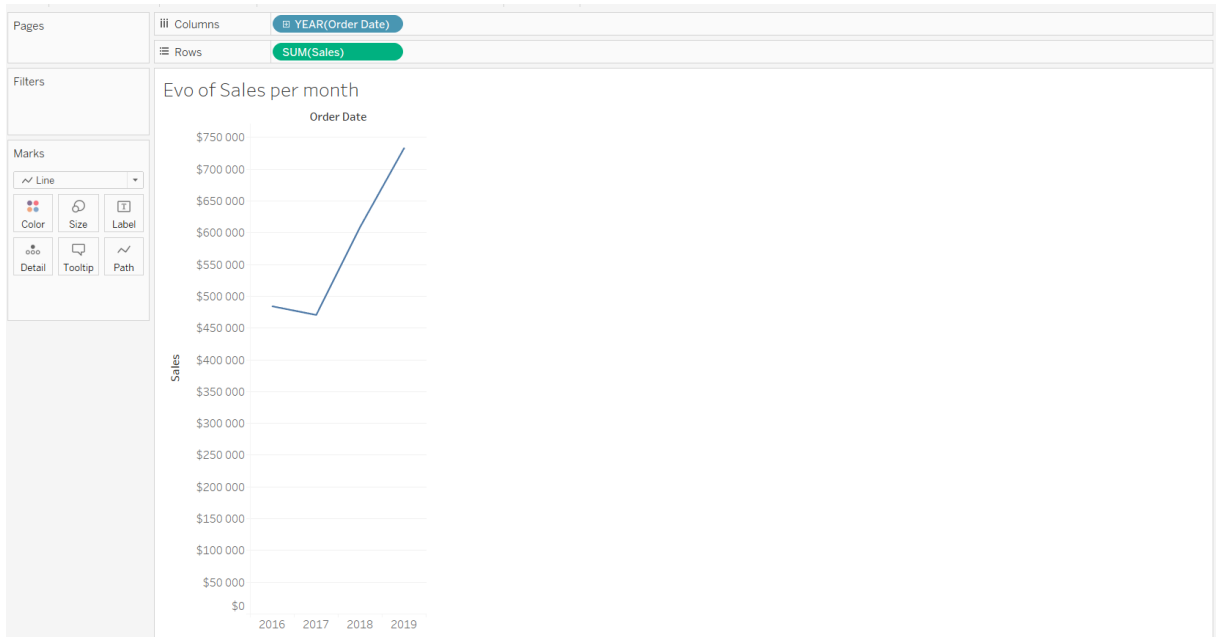


Then we want to order them descending. Click here!

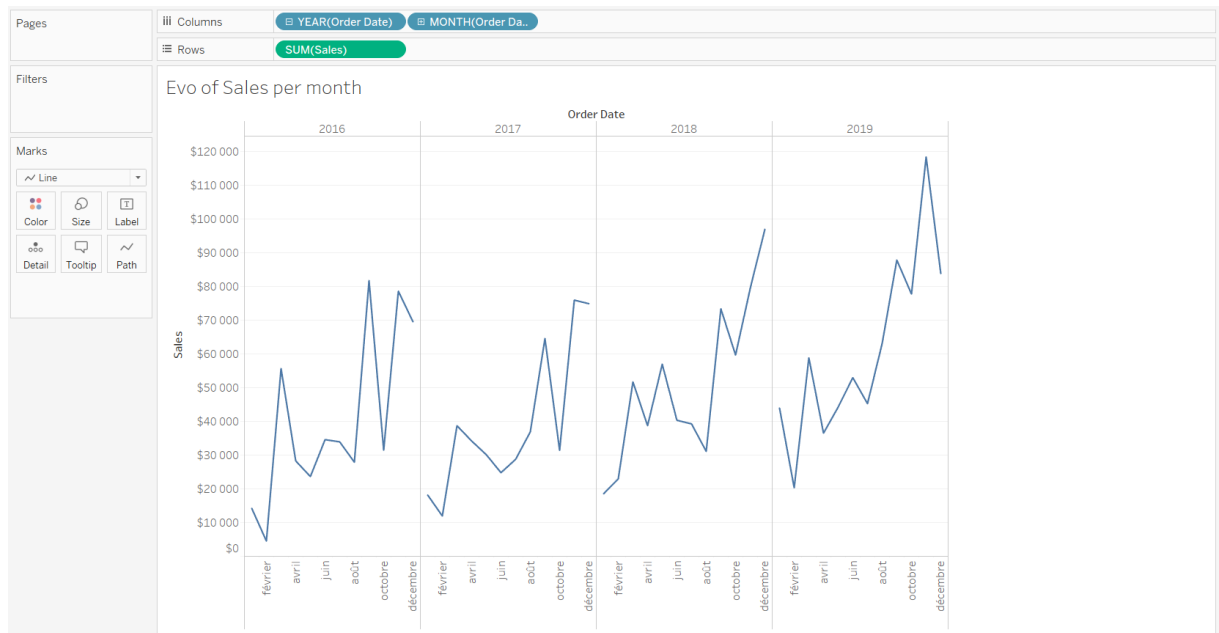


## 3.2 Line Chart

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

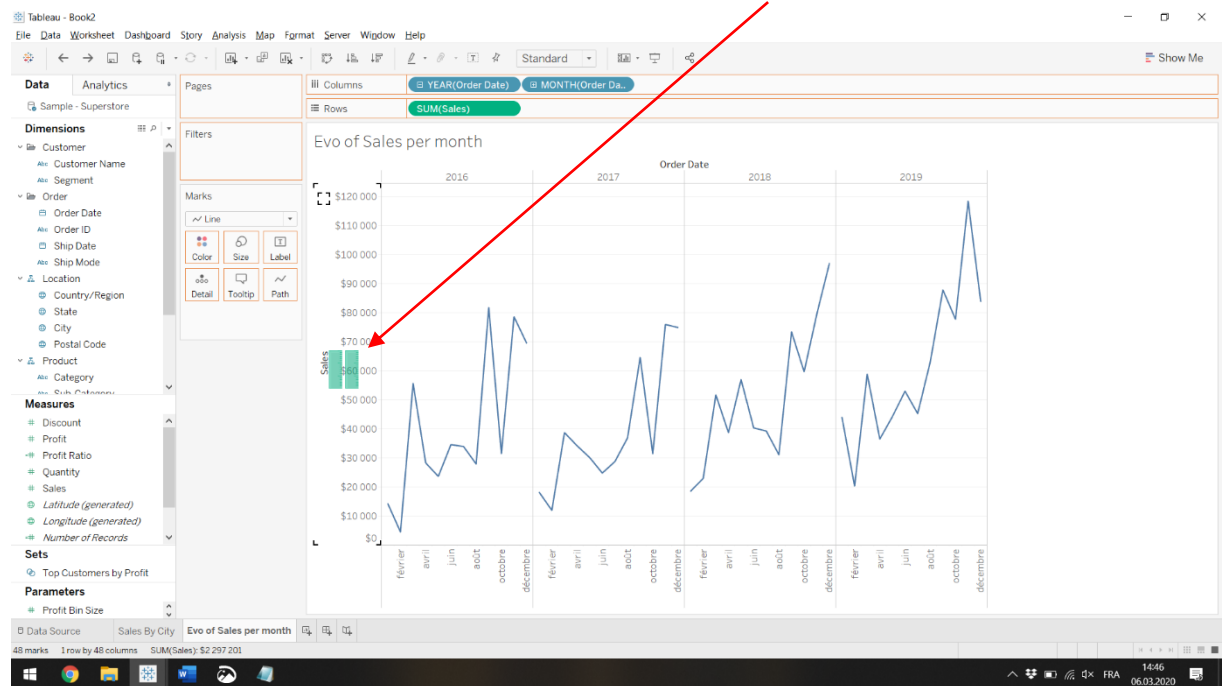


Then click on the small “+” on “the years” and then in “the quarter”. Then drag and drop out “quarter” to finish with a chart like this one.

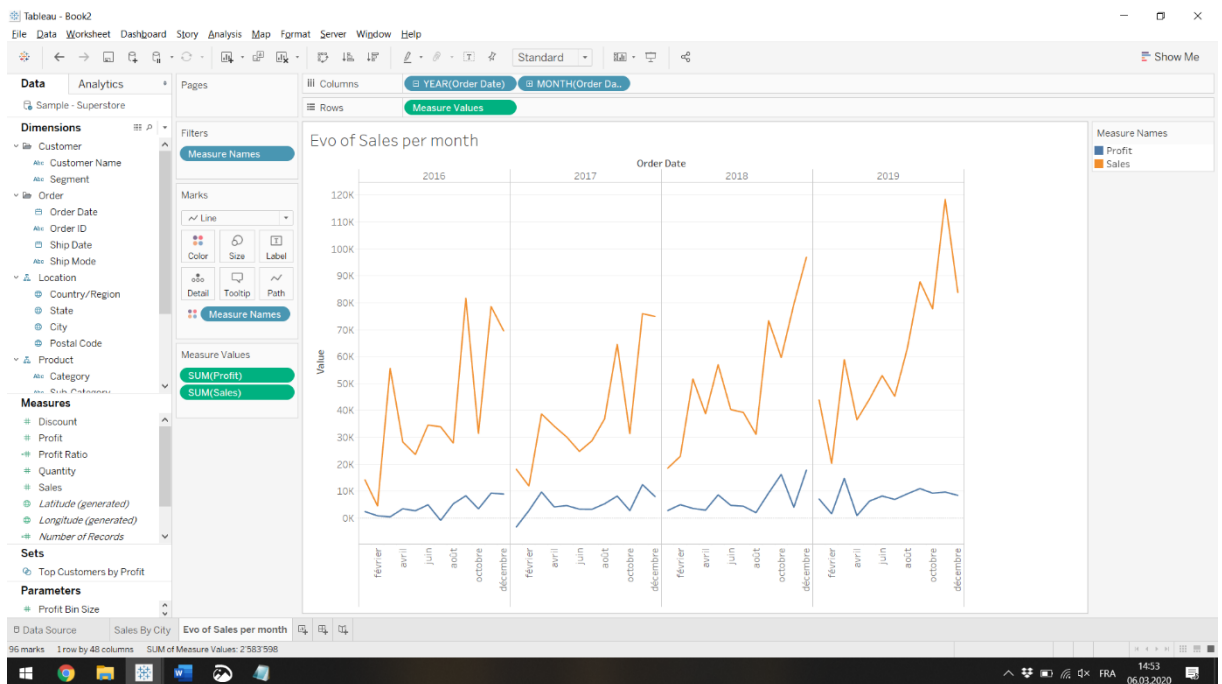




Let's add the curve of profit. For this drag and drop **"Profit"** at this place.

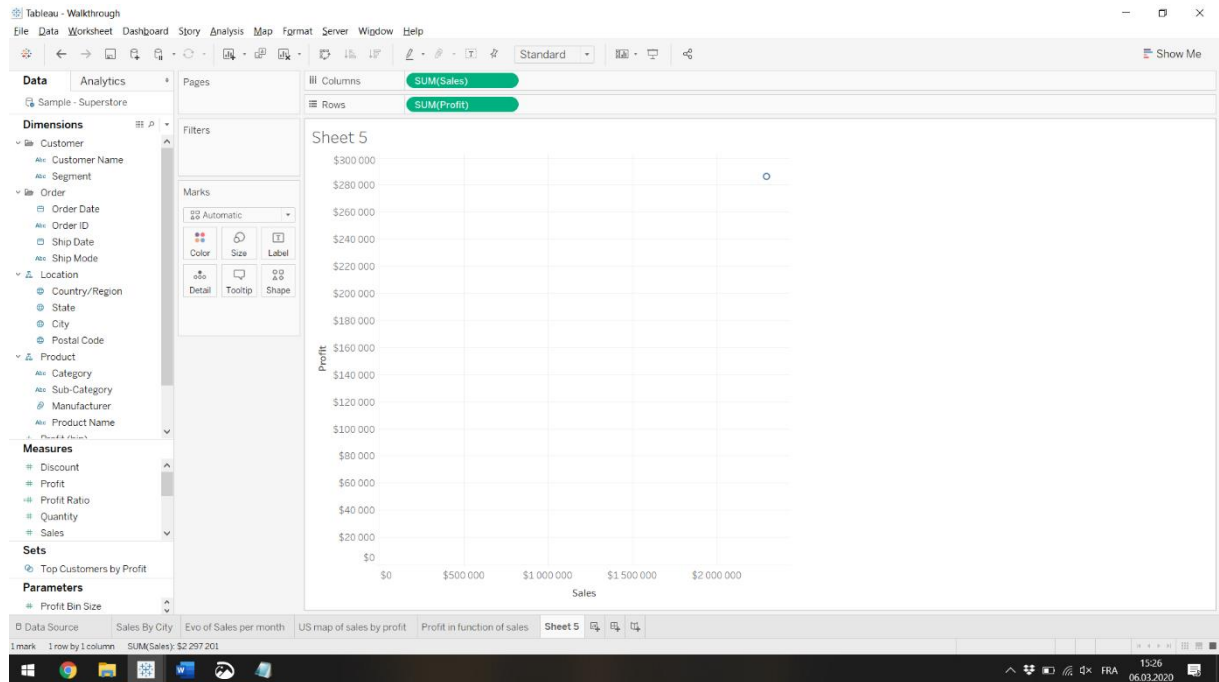


Then we plot the **"Profit"**.

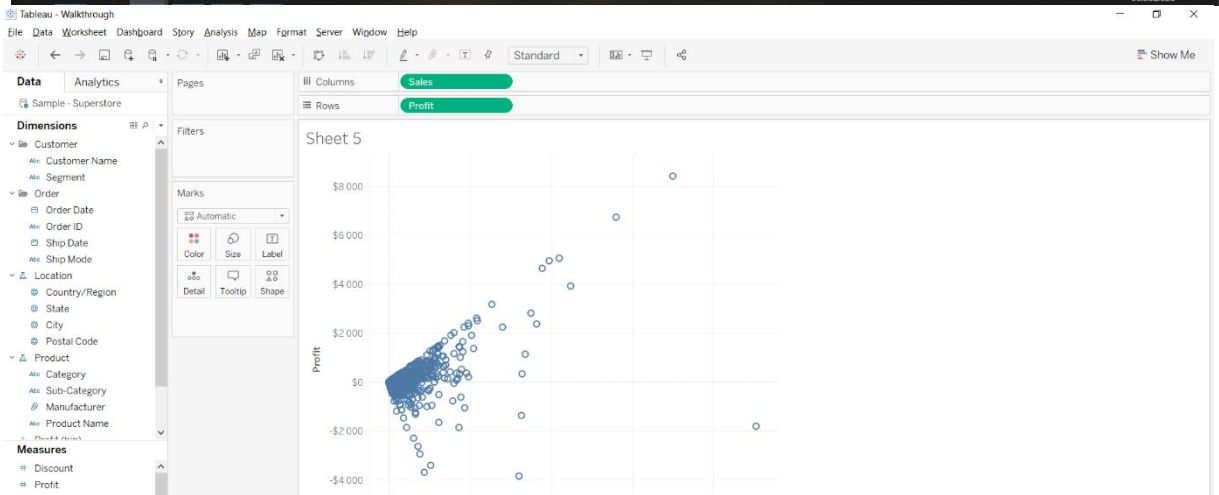
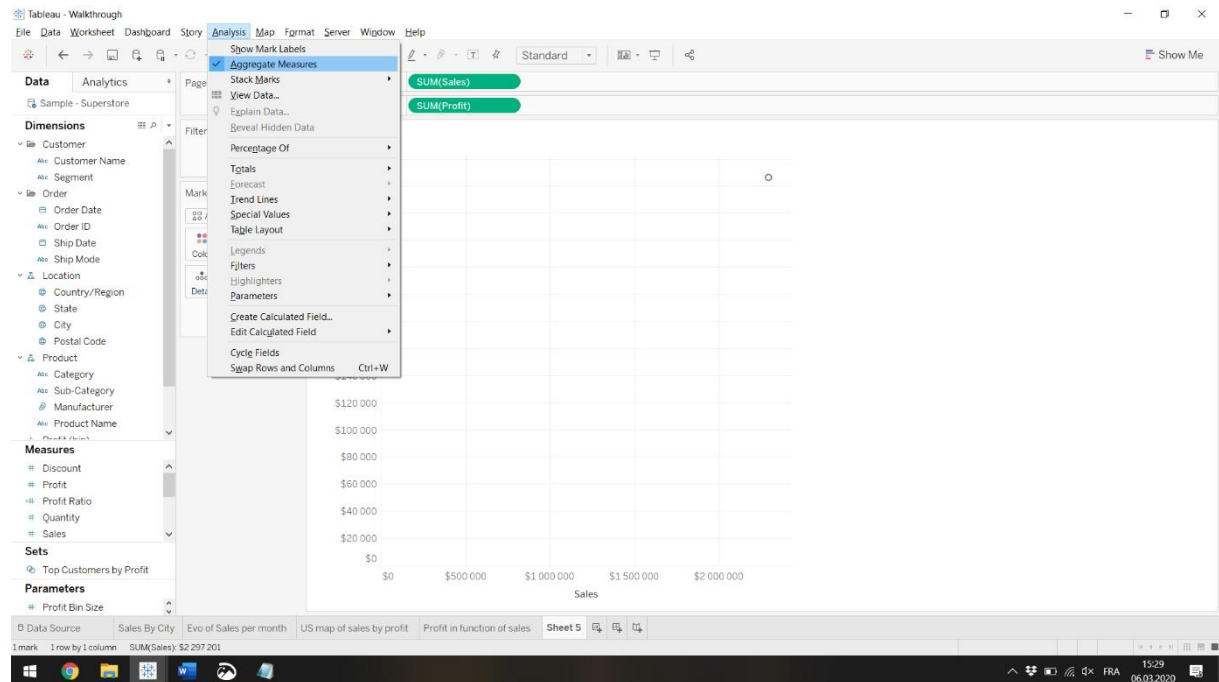


### 3.3 Scatter plot

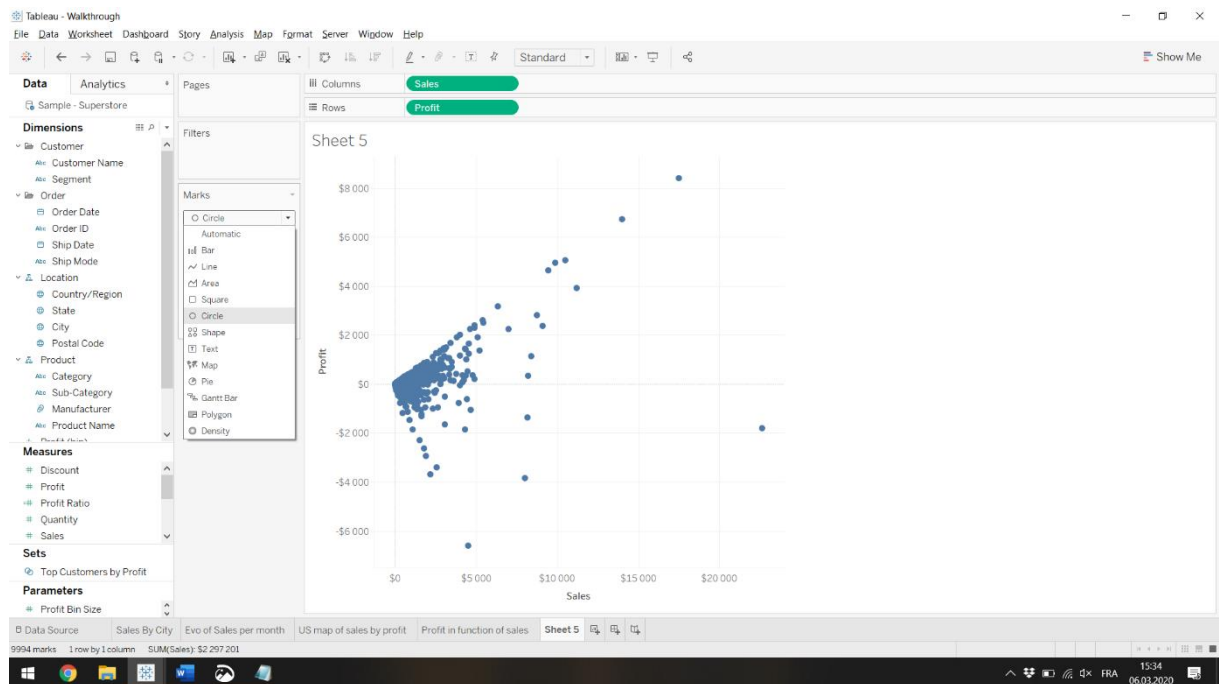
The scatter plot we're going to do is based on **Profit** in function of **Sales**.



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

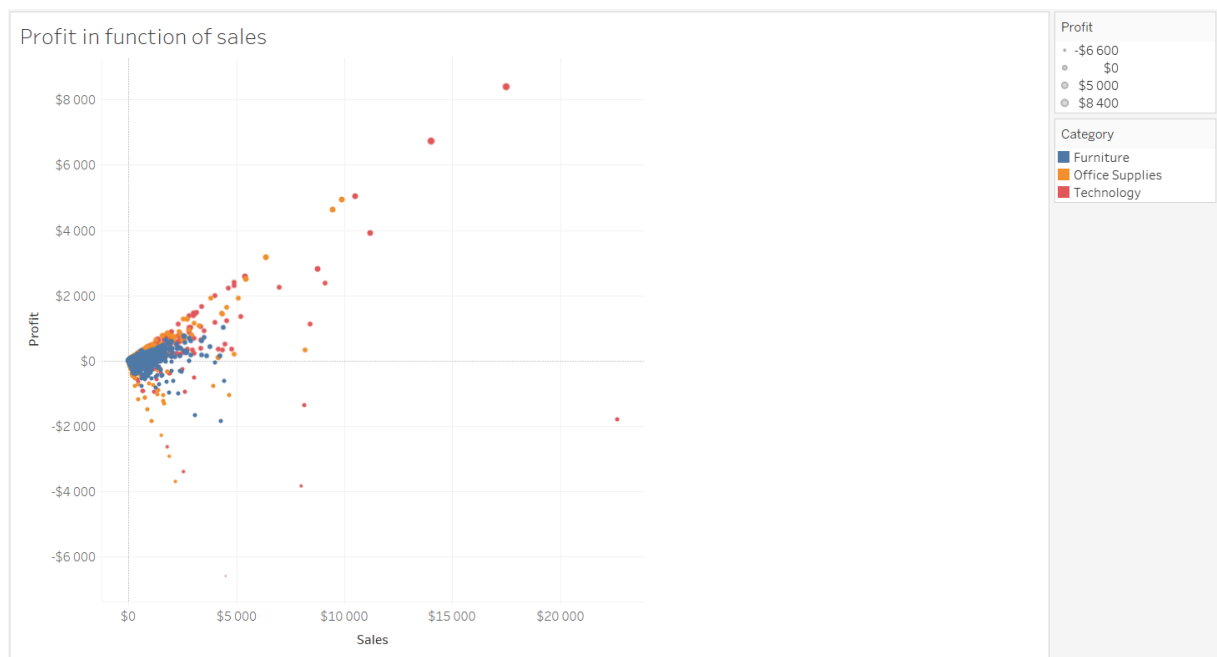


Click on “Circle”.



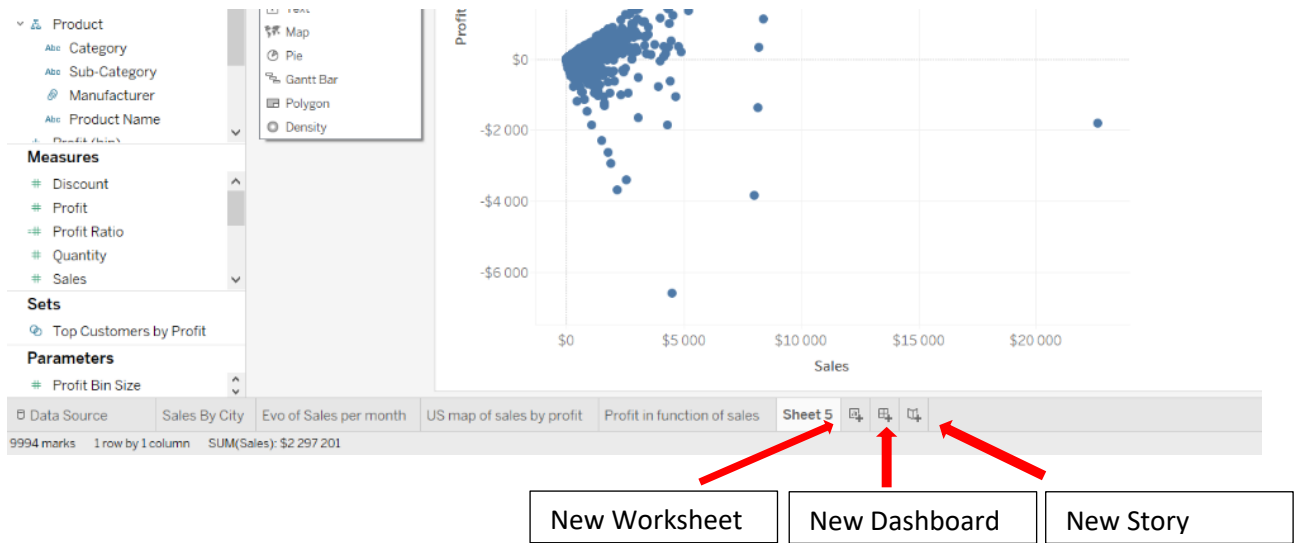
## 4. Small exercise 5 minutes

Let's try to create the following graph:

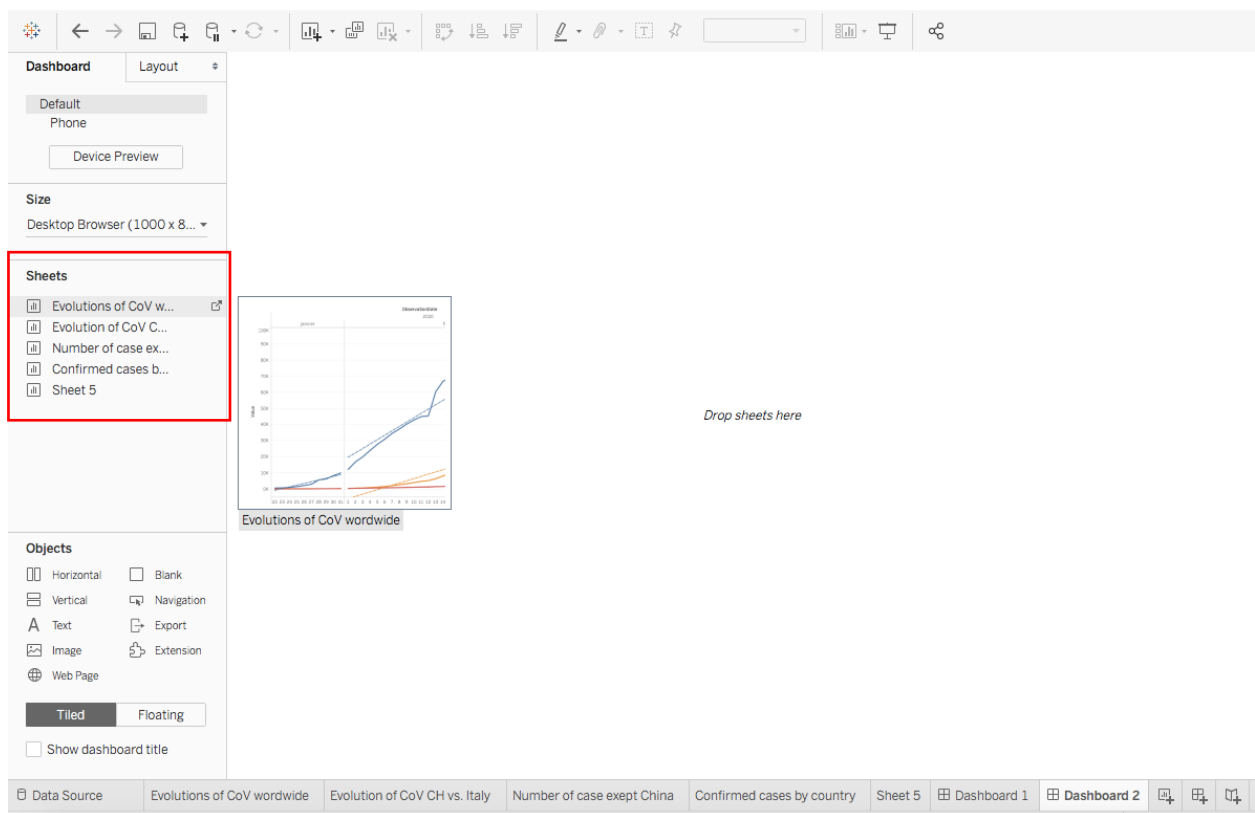


## 5. Dashboards

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”).



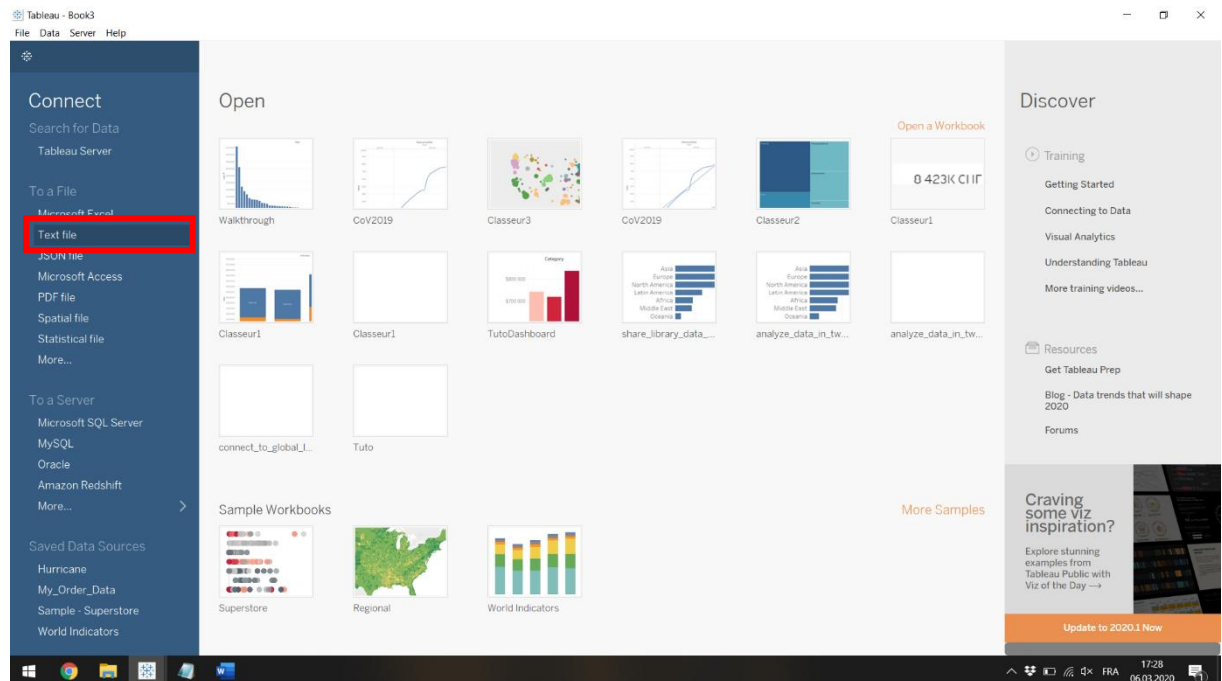
To create a dashboard you can just drag and drop to the dashboard the graphs that you want to add. You can choose among the sheets that you have created before. Then you can move them and adjust your dashboard as you want.



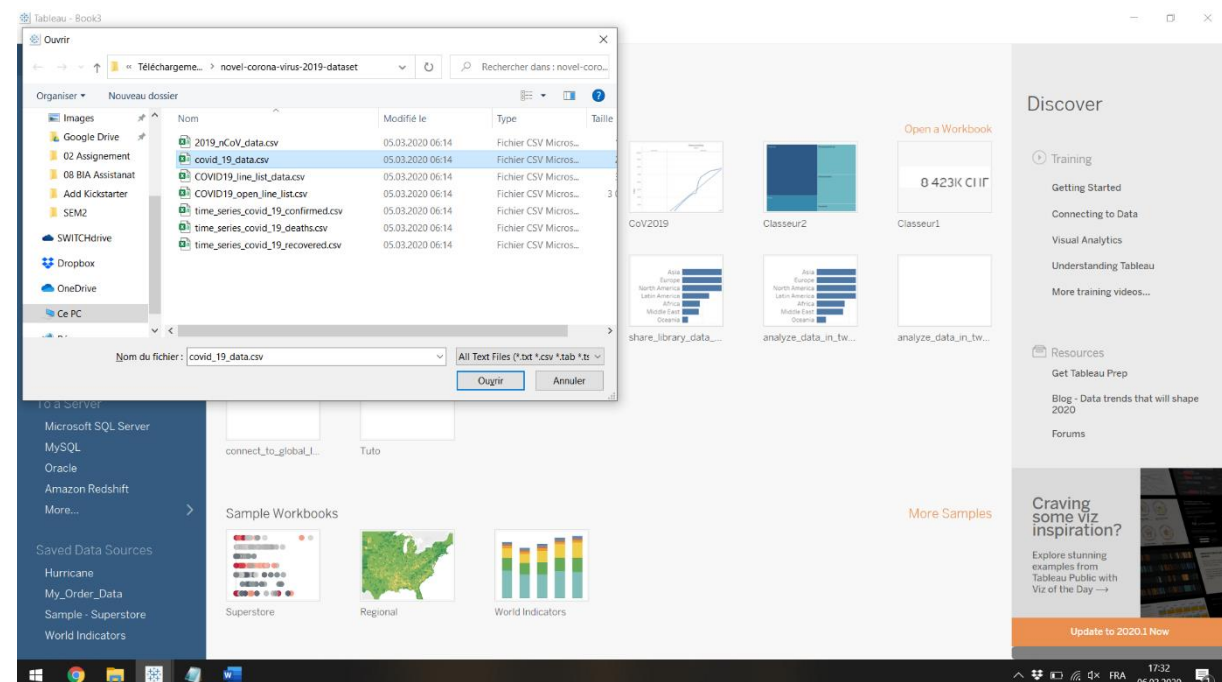
## 6. How to load a CSV (text file): how to start the exercises part

Few steps to start the exercises part.

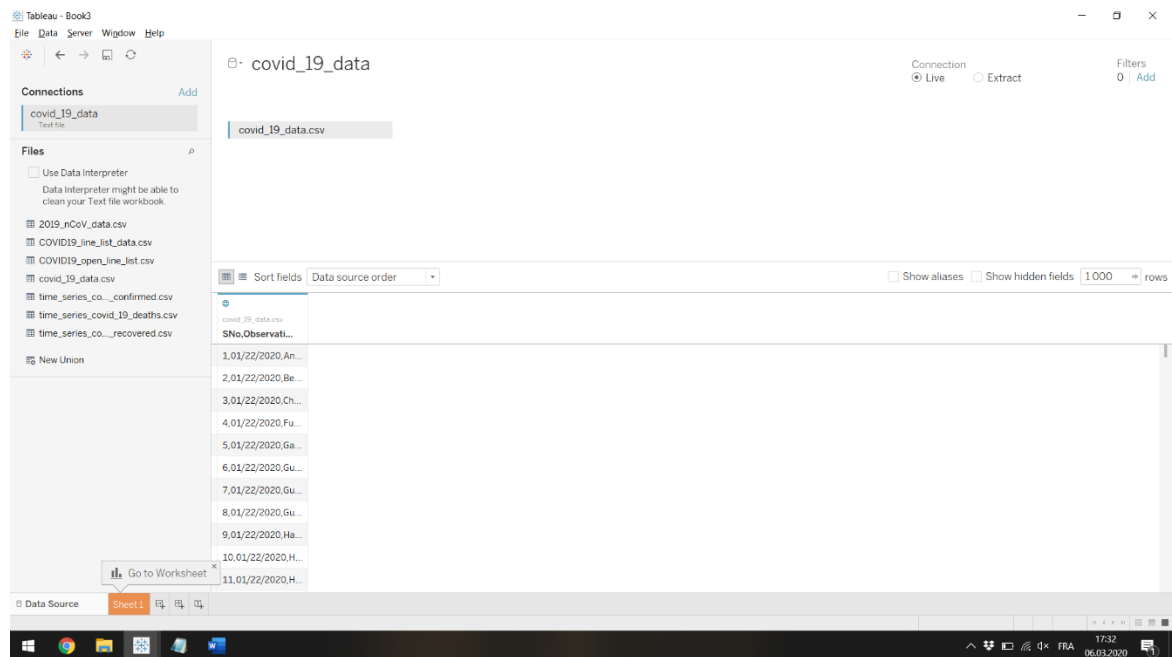
When you're on the main page, click on **"Text File"**



Load in tableau the file name: **"covid\_19\_data.csv"**

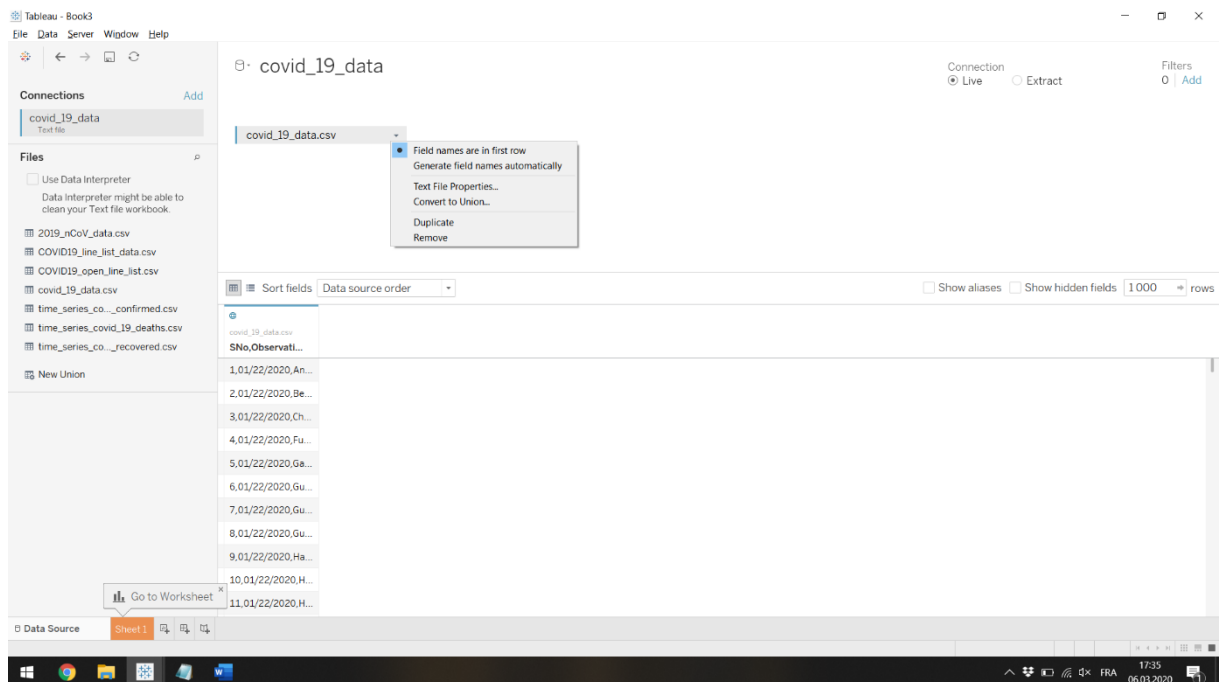


Maybe you're going to have the following issue in the **"Data Source"** worksheet:



To fix it do the following:

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



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

Tableau - Book3

File Data Server Window Help

Connections: covid\_19\_data (Text file)

Files: 2019\_nCoV\_data.csv, COVID19\_line\_list\_data.csv, COVID19\_open\_line\_list\_data.csv, covid\_19\_data.csv, time\_series\_co\_...confirmed.csv, time\_series\_covid\_19\_deaths.csv, time\_series\_co\_...recovered.csv, New Union

Text File Properties dialog:

- Field names are in first row (checked)
- Generate field names automatically
- Text File Properties... (selected)
- Convert to Union...
- Duplicate
- Remove

Sort fields: Data source order

Go to Worksheet

Windows taskbar: 17:35, 06.03.2020

## 3. Then on **“field separator”** choose **“Comma”** and in **“Local”** choose **“English (United States)”**

Tableau - Book3

File Data Server Window Help

Connections: covid\_19\_data (Text file)

Files: 2019\_nCoV\_data.csv, COVID19\_line\_list\_data.csv, COVID19\_open\_line\_list\_data.csv, covid\_19\_data.csv, time\_series\_co\_...confirmed.csv, time\_series\_covid\_19\_deaths.csv, time\_series\_co\_...recovered.csv, New Union

Text File Properties dialog:

- Field separator: Comma
- Text qualifier: Automatically
- Character set: UTF-8
- Locale: English (United States)

Sort fields: Data source order

Go to Worksheet

Windows taskbar: 17:44, 06.03.2020

SNo	ObservationD...	Province/State	Country/Region	Last Update	Confirmed	Deaths	Recovered
1	22.01.2020	Anhui	Mainland China	1/22/2020 17:00	1.00	0.000	0.00
2	22.01.2020	Beijing	Mainland China	1/22/2020 17:00	14.00	0.000	0.00
3	22.01.2020	Chongqing	Mainland China	1/22/2020 17:00	6.00	0.000	0.00
4	22.01.2020	Fujian	Mainland China	1/22/2020 17:00	1.00	0.000	0.00
5	22.01.2020	Gansu	Mainland China	1/22/2020 17:00	0.00	0.000	0.00
6	22.01.2020	Guangdong	Mainland China	1/22/2020 17:00	26.00	0.000	0.00
7	22.01.2020	Guangxi	Mainland China	1/22/2020 17:00	2.00	0.000	0.00
8	22.01.2020	Guizhou	Mainland China	1/22/2020 17:00	1.00	0.000	0.00
9	22.01.2020	Hainan	Mainland China	1/22/2020 17:00	4.00	0.000	0.00
10	22.01.2020	Hebei	Mainland China	1/22/2020 17:00	1.00	0.000	0.00
11	22.01.2020	Heilongjiang	Mainland China	1/22/2020 17:00	0.00	0.000	0.00

And now you're ready to start the exercise 😊