

LAB 0:

GETTING STARTED WITH TABLEAU

Lab by R. Jordan Crouser, Smith College

Introduction to Tableau



- A drag-and-drop tool for mapping data dimensions onto visual dimensions
- Today we will learn:
 - How to load data into Tableau
 - A little bit about how Tableau organizes data
 - How to tell Tableau which facets of the data to display, and how

What is +able | eau?

- Visualization and business analytics software with a strong focus on **relational data**
 - Idea originally developed at Stanford University
 - Now a publically traded company based in Seattle, WA with 2400 employees, \$412 million in revenue (2014)

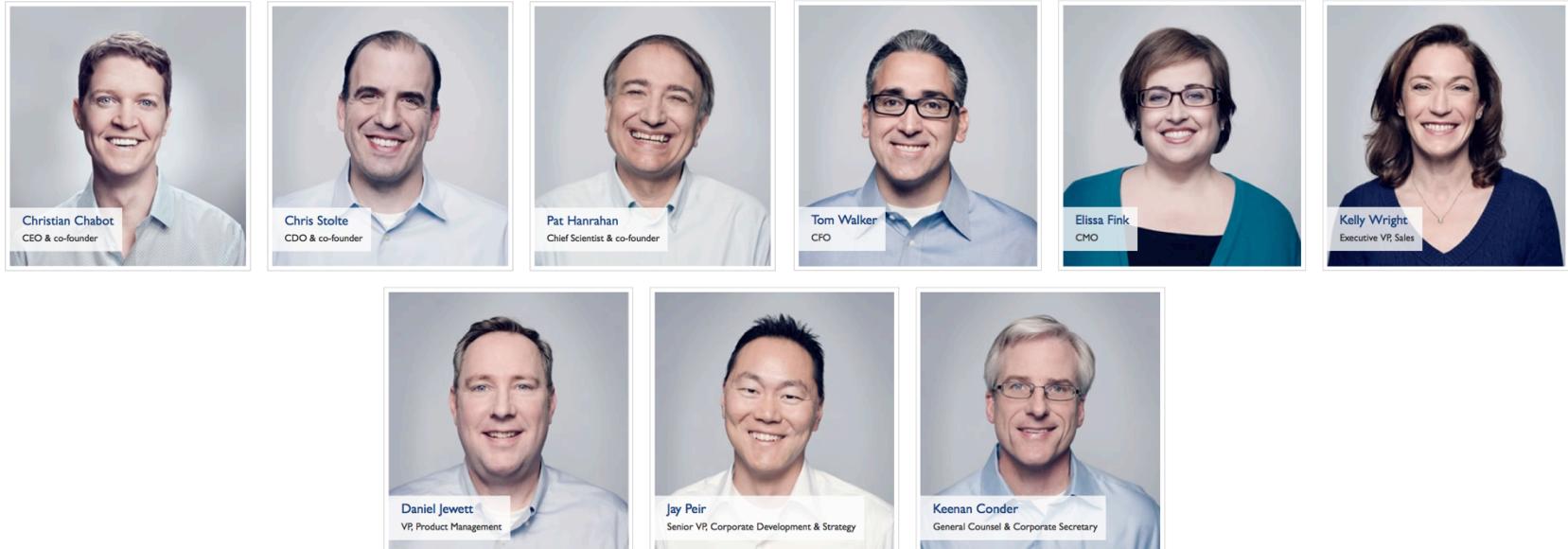


Image credit: www.tableau.com/about/leadership

Main Window: New Workbook

The screenshot shows the Tableau Data Editor interface. The top menu bar includes 'File', 'Edit', 'View', 'Data', 'Analytics', 'Pages', 'Columns', 'Rows', 'Format', 'Tools', 'Help', and 'Normal'. The left sidebar has tabs for 'Data' (selected) and 'Analytics'. The 'Data' tab contains sections for 'Dimensions' and 'Measures', with a 'Connect to Data' button highlighted by a yellow box. The main workspace shows 'Pages', 'Filters', and 'Marks' (Color, Size, Text, Detail, Tooltip). The 'Show Me' panel on the right displays various visualization preview icons and a 'Connect to data' button.

Tableau - Book2

Data Analytics

Connect to Data

Dimensions

Measures

Pages

Filters

Marks

Drop field here

Drop field here

Show Me

Connect to data

Data Source Sheet 1

Main Window: with Data and Views

Tableau - Superstore [Read-Only]

Data Analytics

Sample - Superstore

Dimensions

- Customer
 - Customer Name
 - Segment
- Order
 - Order Date
 - Order ID
 - Ship Date
 - Ship Mode
- Location
 - Country
 - State
 - City
 - Postal Code

Measures

- Days to Ship Actual
- Days to Ship Scheduled
- Discount
- Profit
- Profit Ratio

Parameters

- Churn Rate
- New Business Growth

Pages

Columns QUARTER(Order ..) MONTH(Order D..)

Rows Region Segment Measure Names

Title What if Forecast Based on 2014 Sales (40% Growth, 6.40% Churn)

Marks Automatic

Color Size Text

Detail Tooltip

Measure Na... Measure Values

ABC 123

ACC(SUM([Sale..)) SUM(Sales) SUM(Sales Fore..)

Measure Values

SUM(Sales) SUM(Sales Forecast)

Q1

Region	Segment	January	February	March	Total	
Central	Consumer	\$11,074	\$1,494	\$8,879	\$21,447	
		Sales Forecast	\$14,511	\$1,958	\$11,636	\$28,105
	Corporate	Sales	\$9,014		\$4,875	\$13,889
		Sales Forecast	\$11,813		\$6,388	\$18,200
	Home Office	Sales	\$1,602	\$1,841	\$1,498	\$4,941
		Sales Forecast	\$2,099	\$2,412	\$1,962	\$6,473
	Total	Sales	\$21,691	\$3,335	\$15,252	\$40,278
		Sales Forecast	\$28,423	\$4,370	\$19,986	\$52,789
East	Consumer	\$4,804	\$814	\$3,131	\$8,749	
		Sales Forecast	\$6,296	\$1,066	\$4,102	\$11,464
	Corporate	Sales	\$208	\$2,510	\$2,027	\$4,745
		Sales Forecast	\$272	\$3,289	\$2,656	\$6,217
	Home Office	Sales	\$528	\$1,627	\$1,693	\$3,848
		Sales Forecast	\$691	\$2,132	\$2,218	\$5,041
	Total	Sales	\$5,540	\$4,951	\$6,850	\$17,341
		Sales Forecast	\$7,259	\$6,488	\$8,977	\$22,724
South	Consumer	\$3,706	\$937	\$988	\$5,631	
		Sales Forecast	\$4,856	\$1,228	\$1,295	\$7,379
Corporate	Sales	\$763	\$1,246	\$1,703	\$3,712	

For text tables try
1 or more dimensions
1 or more measures

and Churn Rate to better understand their impact on sales forecasts

Data Source Overview Product Customers Shipping Performance Forecast What If Forecast

572 marks 34 rows by 17 columns SUM of Measure Values: 1,695,711

Data Types

- All data fields are assigned one of the following types:

Icon	Description
Abc	Text values
📅	Date values
🕒	Date & Time values
#	Numerical values
T/F	Boolean values (relational only)
📍	Geographic values (used with maps)

- Occasionally the auto-detected type is wrong; this can be manually overridden using the menu

Main Window: with Data and Views

Tableau - Superstore [Read-Only]

Data Analytics

Sample - Superstore

Dimensions

- Customer
 - Customer Name
 - Segment
- Order
 - Order Date
 - Order ID
 - Ship Date
 - Ship Mode
- Location
 - Country
 - State
 - City
 - Postal Code

Measures

- Days to Ship Actual
- Days to Ship Scheduled
- Discount
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Color Size Text

Detail Tooltip

Measure Na... Measure Values

ABC 123

Measure Values

SUM(Sales)

SUM(Sales Fore..)

Q1

Region	Segment	January	February	March	Total	
Central	Consumer	\$11,074	\$1,494	\$8,879	\$21,447	
		Sales Forecast	\$14,511	\$1,958	\$11,636	\$28,105
	Corporate	Sales	\$9,014	\$4,875	\$13,891	\$37,780
		Sales Forecast	\$11,813	\$6,388	\$18,200	\$46,401
	Home Office	Sales	\$1,602	\$1,841	\$1,498	\$4,941
		Sales Forecast	\$2,099	\$2,412	\$1,962	\$6,473
	Total	Sales	\$21,691	\$3,335	\$15,252	\$40,278
		Sales Forecast	\$28,423	\$4,370	\$19,986	\$52,789
East	Consumer	\$4,804	\$814	\$3,131	\$8,749	
		Sales Forecast	\$6,296	\$1,066	\$4,102	\$11,464
	Corporate	Sales	\$208	\$2,510	\$2,027	\$4,745
		Sales Forecast	\$272	\$3,289	\$2,656	\$6,227
	Home Office	Sales	\$528	\$1,627	\$1,693	\$3,848
		Sales Forecast	\$691	\$2,132	\$2,218	\$5,041
	Total	Sales	\$5,540	\$4,951	\$6,850	\$17,341
		Sales Forecast	\$7,259	\$6,488	\$8,977	\$22,724
South	Consumer	\$3,706	\$937	\$988	\$5,631	
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1 or more measures

and Churn Rate to better understand their impact on sales forecasts

Data Source Overview Product Customers Shipping Performance Forecast What If Forecast

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Data Roles: Dimensions

- In general, any field containing **qualitative or categorical** information is treated as a dimension (e.g. text, dates)
- In relational data, dimensions are the **independent variables**
- Data can be **aggregated** using the values of a dimension
- When added as rows/columns, dimensions produce **headers**

Data Roles: Measures

- In general, any field containing **quantitative** information is treated as a measure (e.g. numerical data, etc.)
- In relational data, measures are the **dependent variables**
- The values of a measure are a **function** of one or more dimensions
- When added as rows/columns, measures produce **axes**

Data Roles: Dimensions vs. Measures

measure

Which is which?

dimension

total number of students in each house



Main Window: with Data and Views

Tableau - Superstore [Read-Only]

Data Analytics

Sample - Superstore

Dimensions

- Customer
 - Customer Name
 - Segment
- Order
 - Order Date
 - Order ID
 - Ship Date
 - Ship Mode
- Location
 - Country
 - State
 - City
 - Postal Code

Measures

- Days to Ship Actual
- Days to Ship Scheduled
- Discount
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- Profit Ratio

Parameters

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Pages

Columns QUARTER(Order ..) MONTH(Order D..)

Rows Region Segment Measure Names

Title

What if Forecast Based on 2014 Sales (40% Growth, 6.40% Churn)

Marks

Automatic

Color Size Text

Detail Tooltip

Measure Na... Measure Values

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		Sales Forecast	\$691	\$2,132	\$2,218	\$5,041
	Total	Sales	\$5,540	\$4,951	\$6,850	\$17,341
		Sales Forecast	\$7,259	\$6,488	\$8,977	\$22,724
South	Consumer	\$3,706	\$937	\$988	\$5,621	
		Sales Forecast	\$4,856	\$1,228	\$1,295	\$7,379
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1 or more dimensions
1 or more measures

and Churn Rate to better understand their impact on sales forecasts

Data Source Overview Product Customers Shipping Performance Forecast What If Forecast

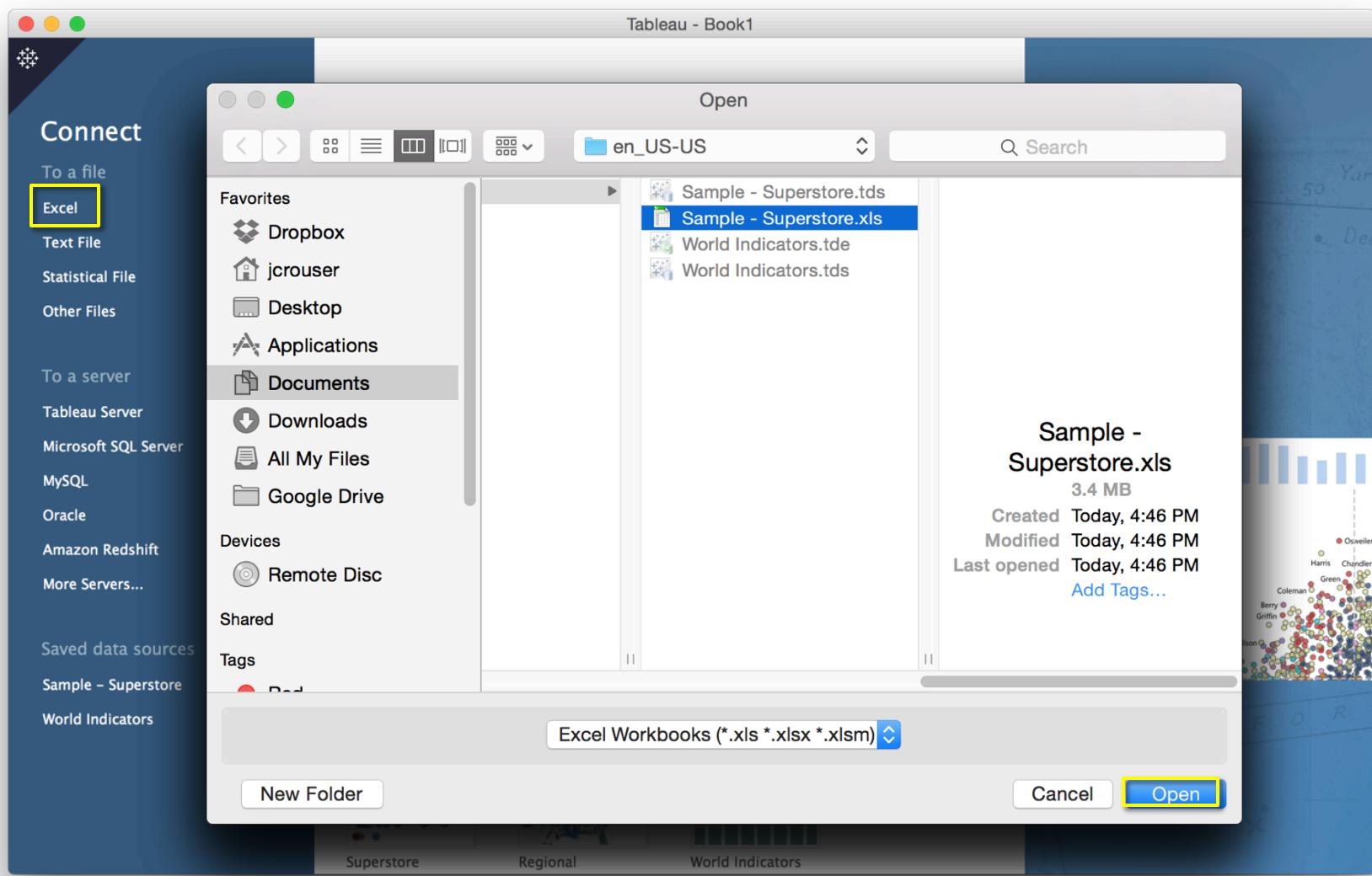
572 marks 34 rows by 17 columns SUM of Measure Values: 1,695,711

21 Available Views

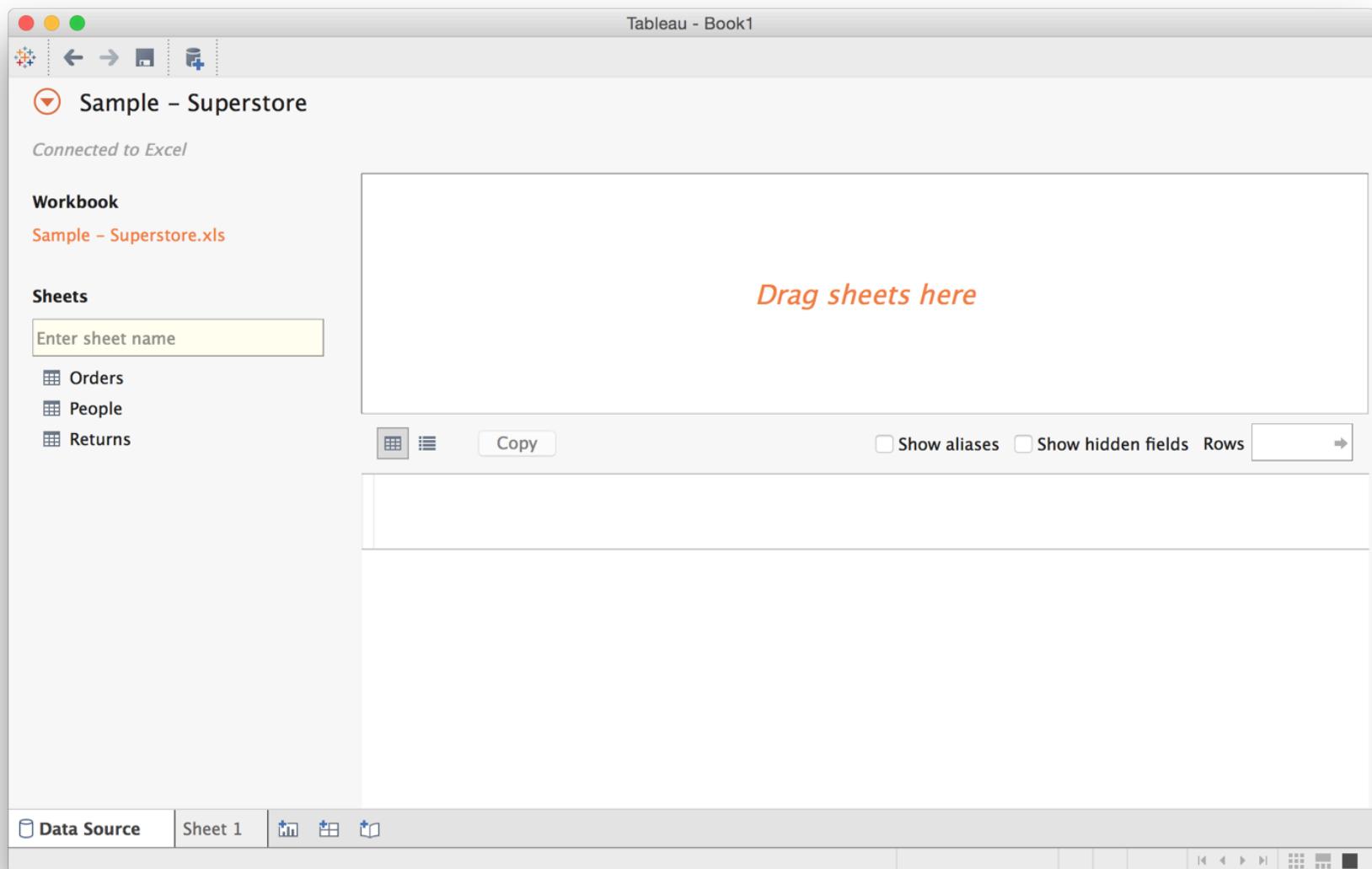


- Tables
- Maps
- Pie charts
- Bar charts
- Treemaps
- Circle views
- Line charts
- Area charts
- Combination charts
- Scatterplots
- Histograms
- Box-and-whisker plots
- Gantt
- Bullet plots
- Packed circles

Lab pt. 1: Getting Started



Connecting to a Data File



Connecting to a Data File

Tableau - Book1

Orders (Sample – Superstore)

Connected to Excel

Connection: Live | Extract

Filters: 0 | Add...

Workbook: Sample – Superstore

Sheets: Enter sheet name, Orders (highlighted), People, Returns

Orders

Copy Show aliases Show hidden fields Rows 9,994

Row ID #	Order ID	Order Date	Ship Date	Ship Mode	Customer ID	Customer Name
1	CA-2013-1521...	11/9/13	11/12/13	Second Class	CG-12520	Costa del Sol Resort
2	CA-2013-1521...	11/9/13	11/12/13	Second Class	CG-12520	Costa del Sol Resort
3	CA-2013-1386...	6/13/13	6/17/13	Second Class	DV-13045	Delta Valley Inn
4	US-2012-108966	10/11/12	10/18/12	Standard Class	SO-20335	South Ocean Lodge
5	US-2012-108966	10/11/12	10/18/12	Standard Class	SO-20335	South Ocean Lodge
6	CA-2011-1158...	6/9/11	6/14/11	Standard Class	BH-11710	Baja Hotel

Go to Worksheet

Data Source Sheet 1

The screenshot shows the Tableau desktop interface with a connection to an Excel file named "Sample – Superstore". The "Orders" sheet is selected. A yellow arrow points from the "Orders" sheet in the "Sheets" list to the "Orders" data source in the main pane. Another yellow arrow points to the "Sheet 1" tab at the bottom. A red box highlights the "Sheet 1" tab.

Creating Views

Tableau - Book1

The screenshot shows the Tableau desktop application interface. On the left, the Data pane lists dimensions and measures from a data source named "Orders (Sample – Super...)".

- Dimensions:** Category, City, Country, Customer ID, Customer Name, Order Date, Order ID, Postal Code, Product ID, Product Name, Region, Row ID, Segment, Ship Date.
- Measures:** Discount, Profit, Quantity, Sales, Latitude (generated), Longitude (generated), Number of Records, Measure Values.

The main workspace consists of three shelves:

- Columns:** An empty shelf with a placeholder "Drop field here".
- Rows:** An empty shelf with a placeholder "Drop field here".
- Marks:** A shelf containing options for Color, Size, and Text, along with Detail and Tooltip buttons.

On the right, the **Show Me** palette displays a grid of visualization preview icons, including various charts like bar charts, line graphs, and maps. Below the palette, instructions read:

Select or drag data
Use the Shift or Cmd key to select multiple fields

At the bottom, the navigation bar includes tabs for Data Source and Sheet 1, along with other standard toolbar icons.

Drag a dimension to “Columns”

The screenshot shows the Tableau interface with the following elements:

- Top Bar:** Includes standard OS X window controls (red, yellow, green), a menu bar with "File", "Edit", "View", "Analysis", "Data", "Help", and a "Normal" mode switch.
- Left Shelf:** Labeled "Dimensions". A yellow arrow points from the text "Drag a dimension to ‘Columns’" to the "Category" dimension entry, which is highlighted with a yellow box.
- Center View:** Shows a data grid with three columns labeled "Furniture", "Office Supplies", and "Technol..". Each column has three rows labeled "Abc".
- Middle Shelf:** Labeled "Rows".
- Bottom Shelf:** Labeled "Marks". Options include "Automatic" (selected), "Color", "Size", "Text", "Detail", and "Tooltip".
- Right Panel:** Labeled "Show Me". It displays a grid of chart preview icons and text: "For text tables try 1 or more dimensions 1 or more measures".
- Bottom Navigation:** Includes tabs for "Data Source" and "Sheet 1", and various toolbar icons.

Text at the bottom left: "3 marks 1 row by 3 columns"

Drag a dimension to “Rows”

Tableau - Book1

Data Analytics

Orders (Sample – Super...)

Dimensions

- Abc Category
- ⊕ City
- ⊕ Country
- Abc Customer ID
- Abc Customer Name
- Order Date
- Order ID
- Postal Code
- Abc Product
- Abc Product Name
- Abc Region
- # Row ID
- Abc Segment
- Ship Date

Measures

- # Discount
- # Profit
- # Quantity
- # Sales
- ⊕ Latitude (generated)
- ⊕ Longitude (generated)
- # Number of Records
- # Measure Values

Pages

Columns Category

Region

Filters

Marks

- Abc Automatic
- Color
- Size
- Abc 123
- Detail
- Tooltip

Category

Region	Furniture	Office Supplies	Technol..
Central	Abc	Abc	Abc
East	Abc	Abc	Abc
South	Abc	Abc	Abc
West	Abc	Abc	Abc

Show Me

For text tables try

1 or more dimensions
1 or more measures

Data Source Sheet 1

12 marks 4 rows by 3 columns

A yellow curved arrow starts at the 'Region' dimension in the Dimensions shelf on the left and points to the 'Region' button in the 'Category' shelf on the right. This visual cue indicates the action of dragging a dimension to the Rows shelf.

Drag a measure onto “Text”

Tableau - Book1

Data Analytics

Orders (Sample – Super...)

Dimensions

- Abc Category
- ⊕ City
- ⊕ Country
- Abc Customer ID
- Abc Customer Name
- Order Date
- Abc Order ID
- ⊕ Postal Code
- Abc Product ID
- Abc Product Name
- Abc Region
- # Row ID
- Abc Segment
- Ship Date

Measures

- # Discount
- # Profit
- # Quantity
- # Sales
- ⊕ Latitude (generated)
- ⊕ Longitude (generated)
- # Number of Records
- # Measure Values

Pages

Columns Category

Rows Region

Marks

- Abc Automatic
- Color
- Size
- Abc 123
- Text
- Detail
- Tooltip

Abc 123 SUM(Sales)

Region	Category		
	Furniture	Office Supplies	Technol..
Central	163,797	167,026	170,416
East	208,291	205,516	264,974
South	117,299	125,651	148,772
West	252,613	220,853	251,992

Show Me

For horizontal bars try

- 0 or more dimensions
- 1 or more measures

Data Source Sheet 1

12 marks 4 rows by 3 columns SUM(Sales): 2,297,201

Further refine by subdividing

Tableau - Book1

Data Analytics

Orders (Sample – Super...)

Dimensions

- Abc Category
- ⊕ City
- ⊕ Country
- Abc Customer ID
- Abc Customer Name
- ⊕ Order Date
- Abc Order ID
- ⊕ Postal Code
- Abc Product
- Abc Product Name
- Abc Region
- # Row ID
- Abc Segment
- ⊕ Ship Date

Measures

- # Discount
- # Profit
- # Quantity
- # Sales
- ⊕ Latitude (generated)
- ⊕ Longitude (generated)
- # Number of Records
- # Measure Values

Pages

Columns Category

Region Segment

Filters

Marks

- Abc Automatic
- Color
- Size
- Abc 123 Text
- Detail
- Tooltip

Abc 123 SUM(Sales)

Category

Region	Segment	Furniture	Office Supplies	Technol...
Central	Consumer	86,229	93,111	72,691
	Corporate	52,086	41,138	64,773
	Home Office	25,482	32,777	32,953
East	Consumer	114,212	101,255	135,441
	Corporate	64,209	66,475	69,726
	Home Office	29,870	37,786	59,807
South	Consumer	70,800	59,505	65,276
	Corporate	29,645	45,930	46,311
	Home Office	16,853	20,217	37,185
West	Consumer	119,808	110,081	132,992
	Corporate	83,080	77,134	65,641
	Home Office	49,725	33,638	53,359

Show Me

For stacked bars try
1 or more dimensions
1 or more measures

Data Source Sheet 1

36 marks 12 rows by 3 columns SUM(Sales): 2,297,201

From Text Table to Bar Chart

Tableau - Book1

Data Analytics

Orders (Sample – Super...)

Dimensions

- Abc Category
- City
- Country
- Abc Customer ID
- Abc Customer Name
- Order Date
- Order ID
- Postal Code
- Abc Product ID
- Abc Product Name
- Abc Region
- # Row ID
- Abc Segment
- Ship Date

Marks

- Abc Automation
- Color
- Detail
- Text
- Abc 123
- SUM(Sales)
- Abc 123

Pages

Columns

Rows

Region Segment

Category

Region	Segment	Furniture	Office Supplies	Technol...
Central	Consumer	86,229	93,111	72,691
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For stacked bars try
1 or more dimensions
1 or more measures

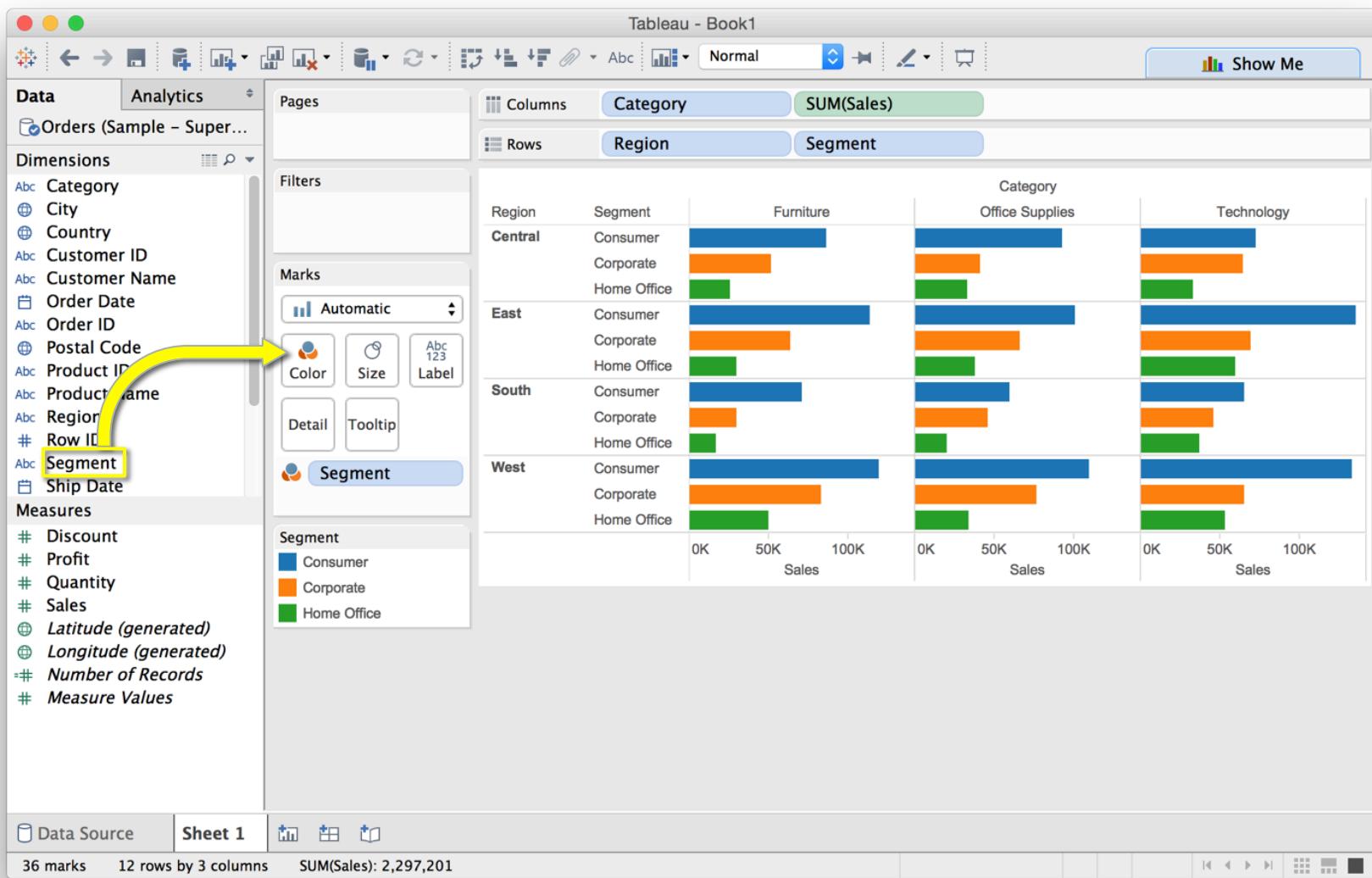
Data Source Sheet 1

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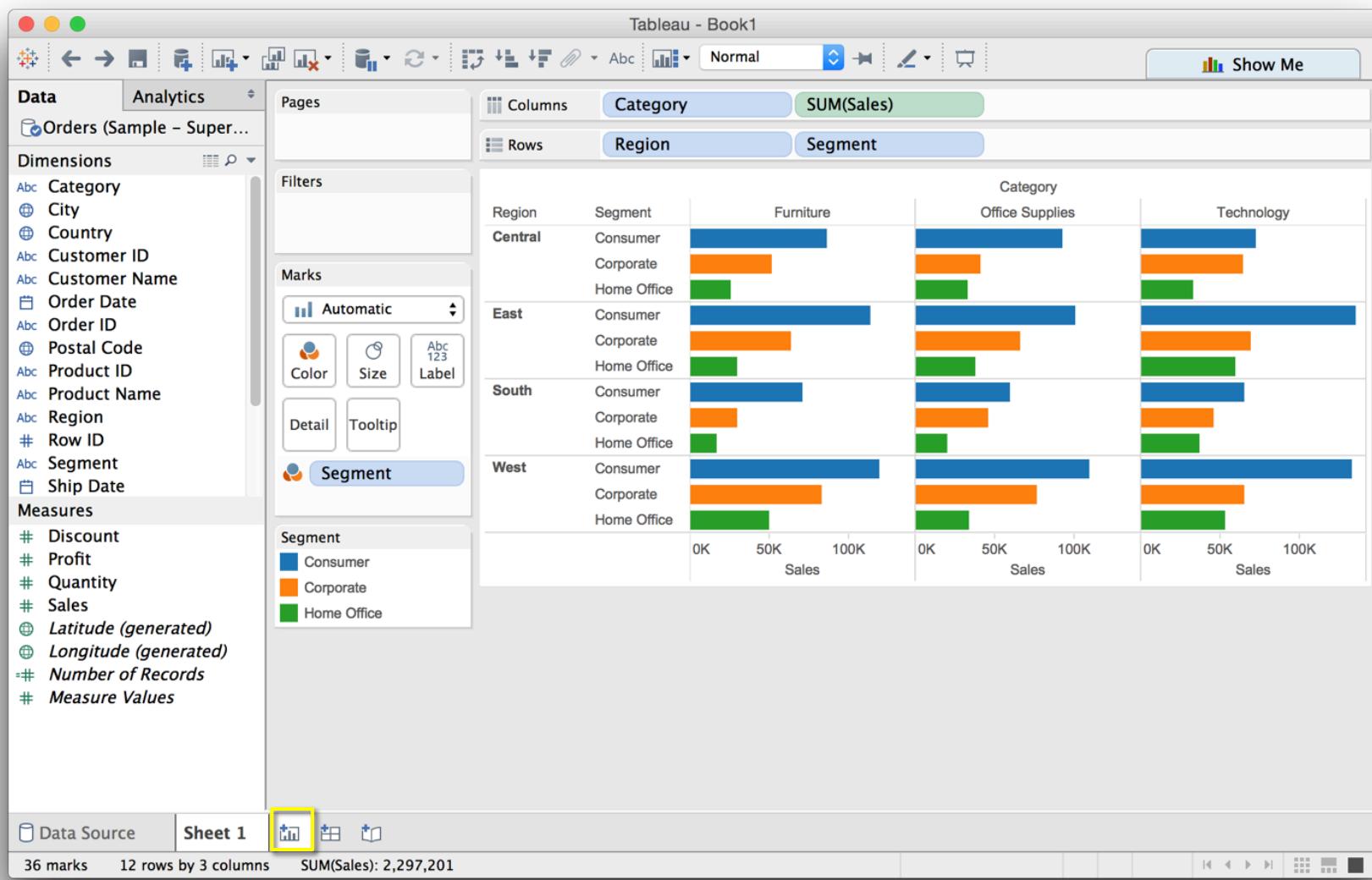
The screenshot shows the Tableau interface with a data view and a 'Show Me' panel. A yellow arrow points from the 'SUM(Sales)' button in the Marks shelf to the 'SUM(Sales)' field in the Columns shelf. The 'Show Me' panel on the right suggests creating a bar chart.

Region	Segment	Furniture	Office Supplies	Technol...
Central	Consumer	86,229	93,111	72,691
Central	Corporate	52,086	41,138	64,773
Central	Home Office	25,482	32,777	32,953
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West	Home Office	49,725	33,638	53,359

Dual encoding using color



Creating a new sheet



Using “Show Me”: a VIS recommender

The screenshot shows the Tableau interface with the title bar "Tableau - Book1". The left sidebar contains the "Data" and "Analytics" tabs, with "Orders (Sample – Super..." selected. Under "Dimensions", "State" is highlighted. Under "Measures", several fields are listed: "# Discount", "# Profit", "# Quantity", "# Sales", "# Latitude (generated)", "# Longitude (generated)", "# Number of Records", and "# Measure Values". The main workspace shows the "Columns" and "Rows" shelves with "Drop field here" placeholder text. To the right, the "Show Me" feature is displayed, showing a grid of visualization icons. One icon, a world map, is highlighted with a yellow border. Below the icons, text reads: "For filled maps try 1 geo dimension 0 or more dimensions 0 or 1 measure". The bottom navigation bar includes tabs for "Data Source", "Sheet 1", and "Sheet 2", along with other standard Tableau controls.

Using “Show Me”: a VIS recommender

Tableau - Book1

Data Analytics

Orders (Sample – Super...)

Dimensions

- Order Date
- Order ID
- Postal Code
- Product ID
- Product Name
- Region
- Row ID
- Segment
- Ship Date
- Ship Mode
- State
- Sub-Category
- Measure Names

Measures

- Discount
- Profit
- Quantity
- Sales
- Latitude (generated)
- Longitude (generated)
- Number of Records
- Measure Values

Pages

Columns Longitude (generated)

Rows Latitude (generated)

Marks

Filled Map

Color Size Label

Detail Tooltip

State

© OpenStreetMap contributors

Show Me

For filled maps try

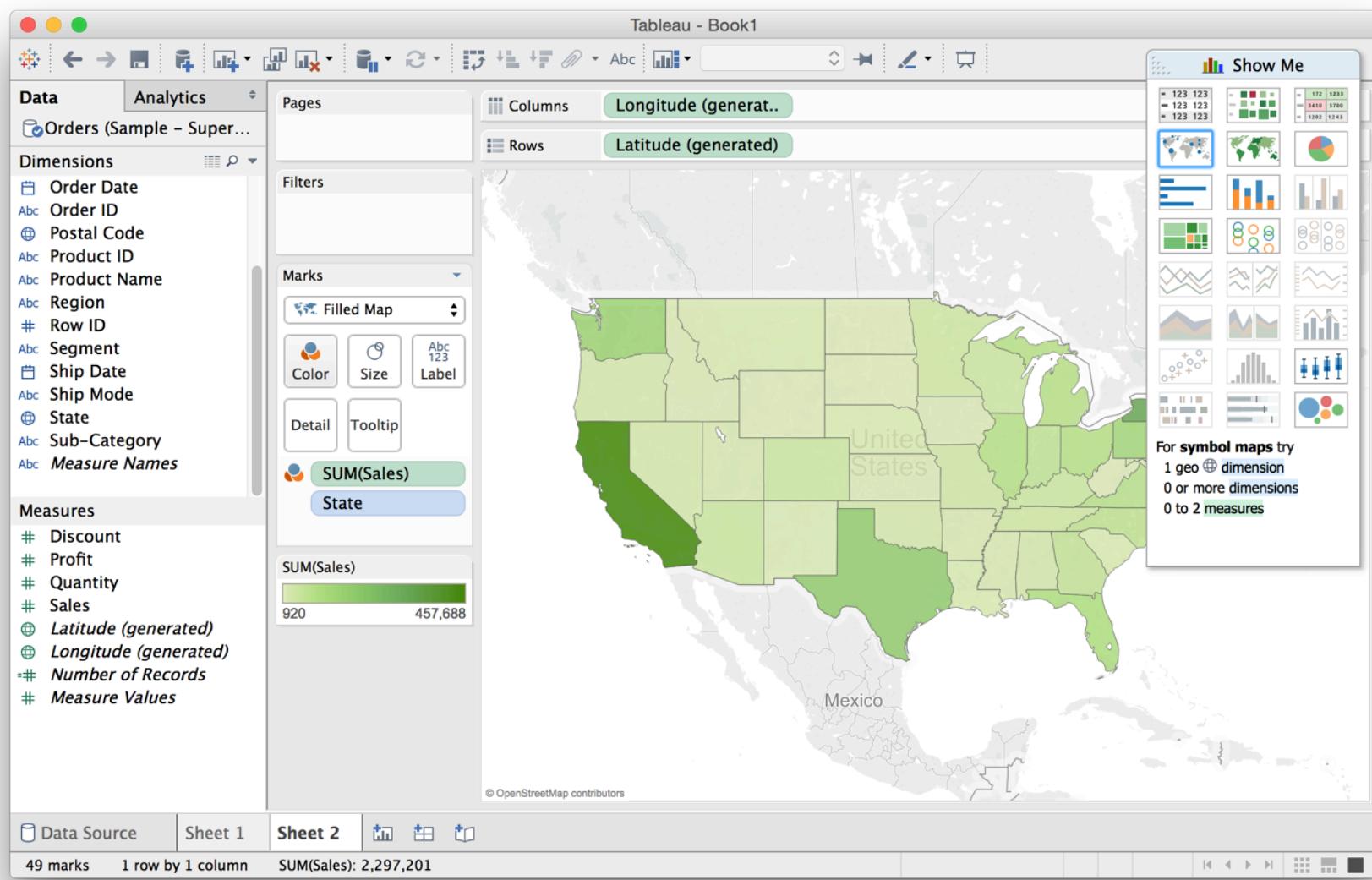
- 1 geo dimension
- 0 or more dimensions
- 0 or 1 measure

Data Source Sheet 1 Sheet 2

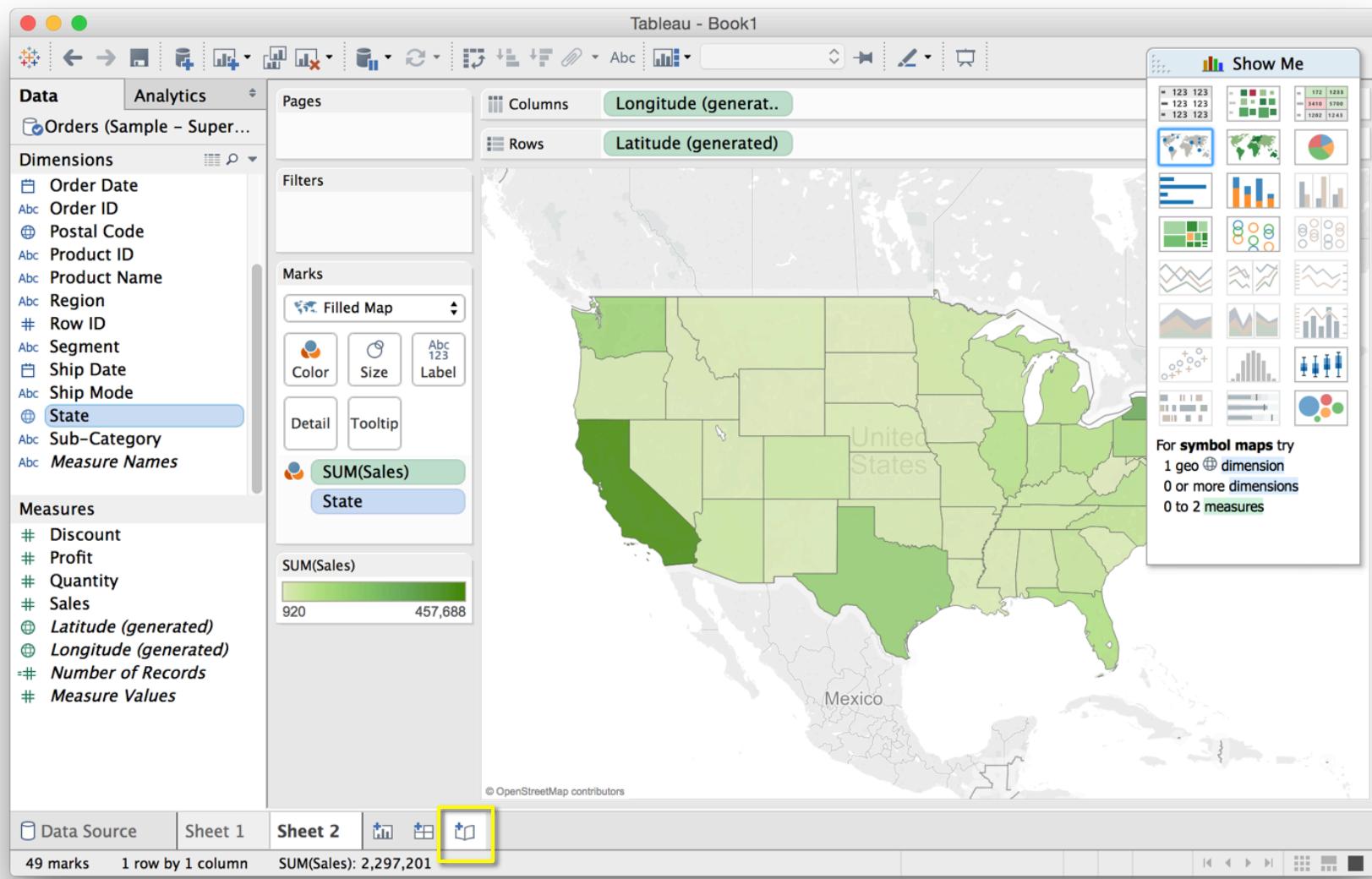
49 marks 1 row by 1 column

A yellow arrow points from the 'Sales' measure in the Data pane to the 'Color' button in the Marks card.

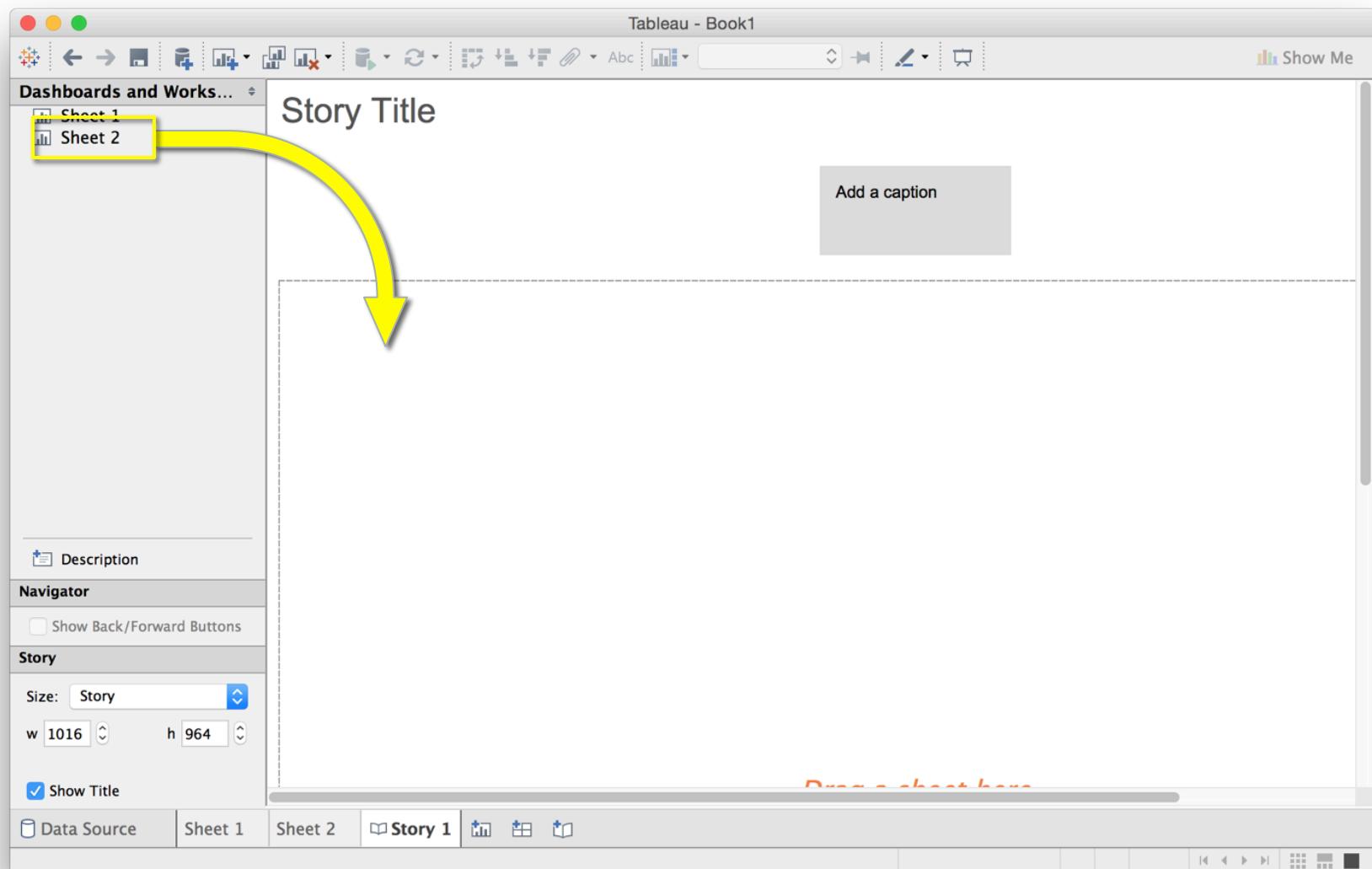
Using “Show Me”: a VIS recommender



Building Stories from Multiple Views



Building Stories from Multiple Views



Building Stories from Multiple Views

Tableau - Book1

Dashboards and Works... ▾

Story Title

Add a caption

New Blank Point

Duplicate

Description

Navigator

Show Back/Forward Buttons

Story

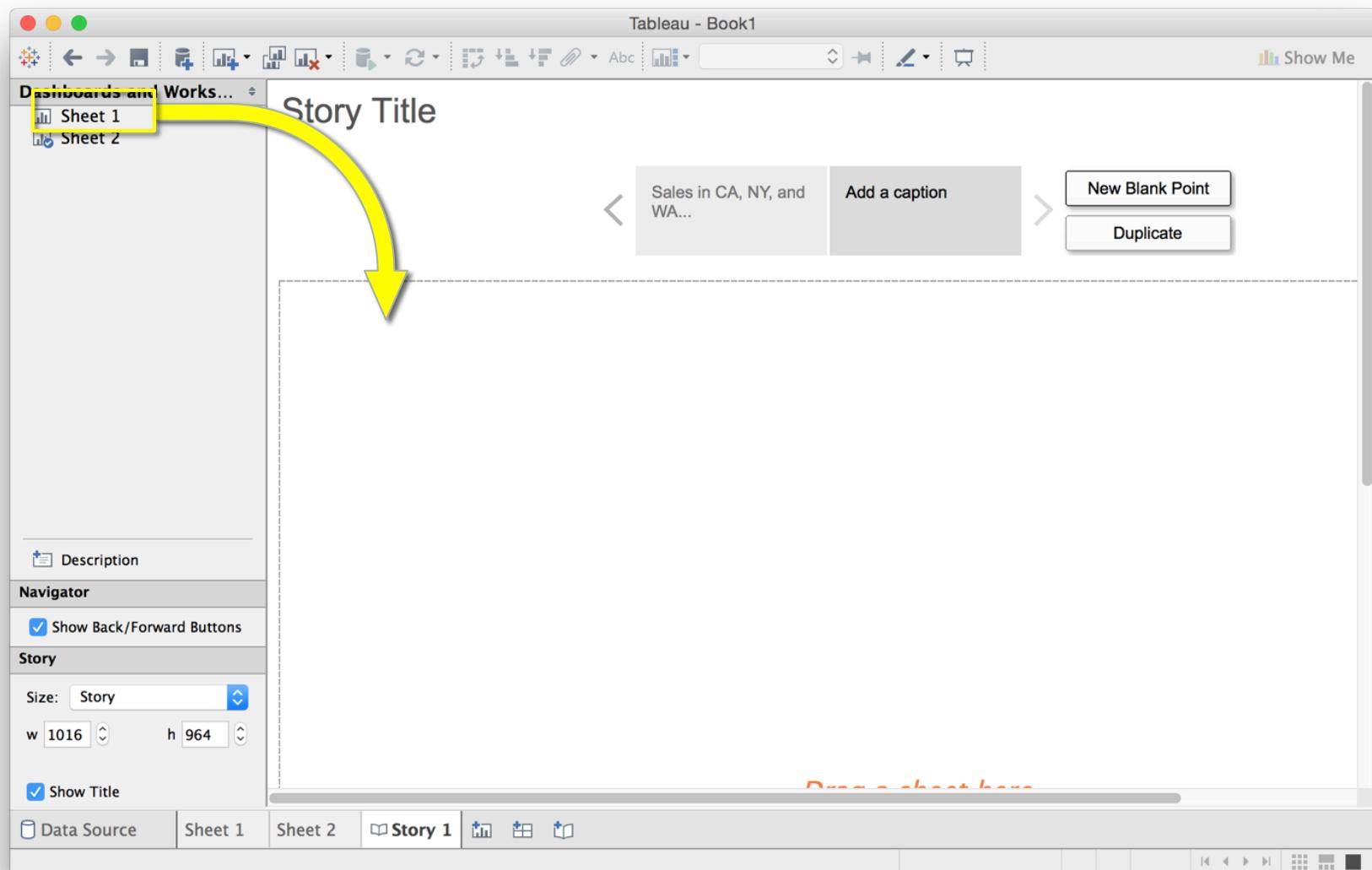
Size: Story

w 1016 h 964

Show Title

Data Source Sheet 1 Sheet 2 Story 1

Building Stories from Multiple Views



Building Stories from Multiple Views

Tableau - Book1

Dashboards and Works...

Story Title

Sales in CA, NY, and WA...

Add a caption

New Blank Point

Duplicate

Region Segment Category

Region	Segment	Furniture	Office Supplies	Technology
Central	Consumer	~85K	~95K	~85K
	Corporate	~50K	~45K	~60K
	Home Office	~35K	~40K	~40K
East	Consumer	~110K	~100K	~120K
	Corporate	~60K	~65K	~70K
	Home Office	~40K	~45K	~55K
South	Consumer	~65K	~55K	~70K
	Corporate	~35K	~45K	~50K
	Home Office	~20K	~25K	~35K
West	Consumer	~120K	~105K	~125K
	Corporate	~75K	~70K	~80K
	Home Office	~50K	~45K	~60K

0K 50K 100K Sales

0K 50K 100K Sales

0K 50K 100K Sales

Description

Navigator

Show Back/Forward Buttons

Story

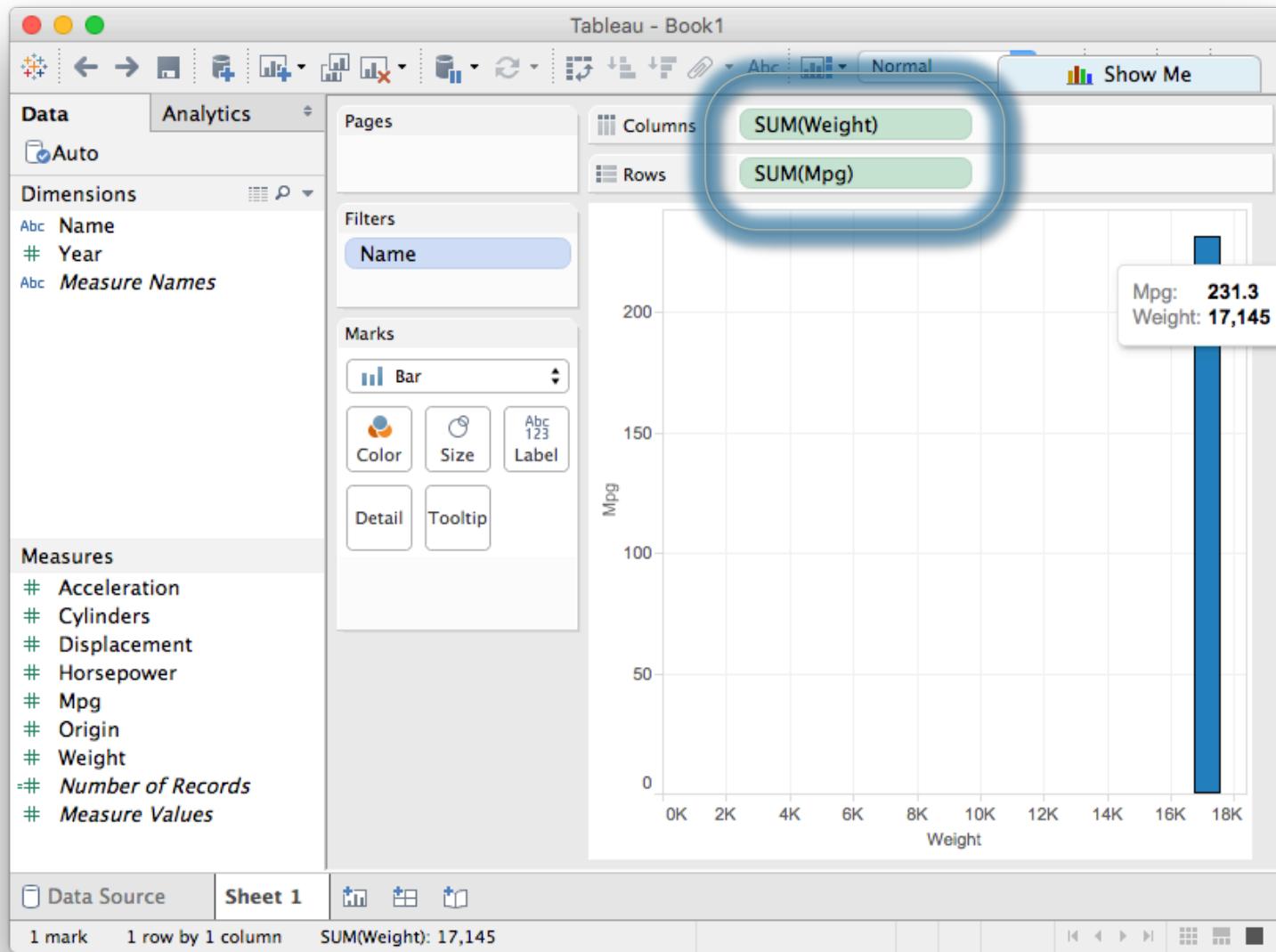
Size: Story

w 1016 h 964

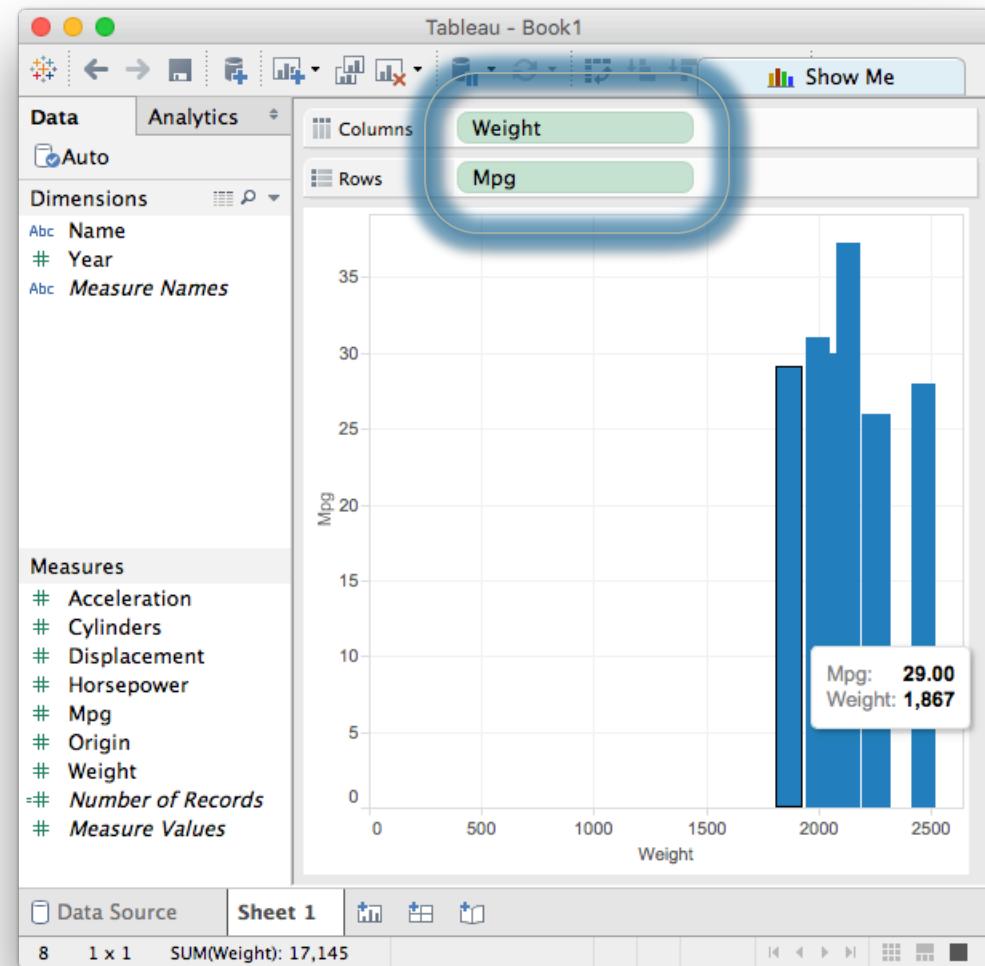
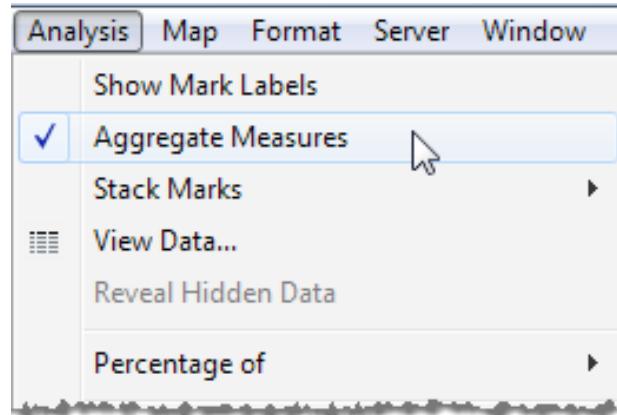
Show Title

Data Source Sheet 1 Sheet 2 Story 1

Quick note on aggregation



Quick note on aggregation



Questions?

Lab pt. 2: Exploring Other Datasets

Tableau - Book1

Connect

- To a file
 - Excel
 - Text File
 - Statistical File
 - Other Files
- To a server
 - Tableau Server
 - Microsoft SQL Server
 - MySQL
 - Oracle
 - Amazon Redshift
 - More Servers... >
- Saved data sources
 - Sample – Superstore
 - World Indicators

Open

Open a workbook

Discover

Training (view all)

- Getting Started
- Connecting to Data
- Visual Analytics

VIZ OF THE WEEK

Height and Weight of the NFL

Sample Workbooks

- Superstore
- Regional
- World Indicators

More samples

Lab pt. 2: Exploring Other Datasets

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Resources / How-to Videos

A buffet of materials to help get you started, or take you to the next level.

How-to Videos

Sample Data Sets

Live Training

Tableau User Forums

Government

2016 Presidential Candidate Spending Records are as of mid May 2016. Data comes from the Federal Election Commission. [Dataset \(csv\)](#)

UK Big Lottery Fund since 2004 Basic grants data from the UK BIG Lottery Fund, for grants made from 2004 onwards, via data.gov.uk. [Dataset \(xlsx\)](#)

113th US Congress Voting Record Every vote of the 113th US Congress via the Sunlight Foundation's OpenCongress.org. There are two sheets, "Bills" contains the vote data whereas "Sunlight Info" contains additional meta data. You can join them on "Source URL" [Dataset \(xlsx\)](#)

Military Equipment Transfer to Local Police via the 1033 Program All military equipment transfer requests to local police via the 1033 program from September 2011 to September 2013 courtesy of muckrock.com. [Dataset \(xlsx\)](#)

Education

UK University Research Excellence Framework Ratings 2014 The UK 2014 University results via Research For Excellence. REF is the new system for assessing the quality of research in UK higher education institutions. [Dataset \(xlsx\)](#)

Discussion

- What are some of Tableau's strengths? Weaknesses?
- Was there anything you couldn't figure out?