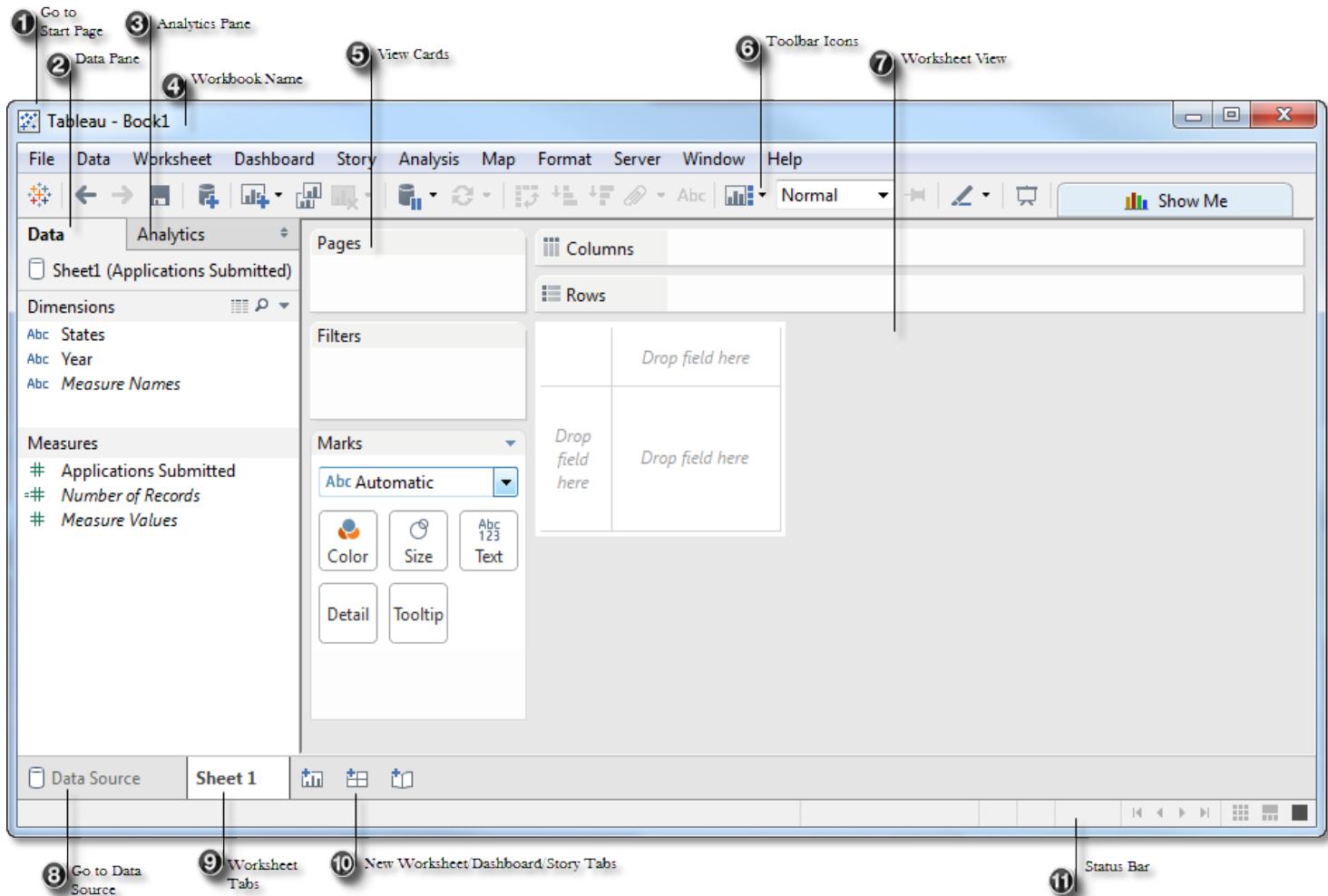


The Tableau Reporting Tool

Application Terminology



1. **Go to Start Page:** Toggle between the active sheet and the Desktop Start Page.
2. **Data Pane:** Includes dimensions and measures, populated from your selected data source. May also include calculated fields, parameters, or sets.
3. **Analytics Pane:** Includes options you can use to apply reference lines, forecasts, trend lines, to add totals to crosstabs, and to build boxplots.
4. **Workbook Name:** The file name of our workbook.
5. **View Cards:** Used for modifying the worksheet.
6. **Toolbar Icons:** Icons are available for quick access to popular features.
7. **Worksheet/View:** Workspace for building your visualizations.
8. **Go to Data Source:** Returns you to the data source specification page.
9. **Worksheet Tabs:** Click to view a specific worksheet, dashboard, or story
10. **New Worksheet, Dashboard, and Story Tabs:** Click to create a new Worksheet, Dashboard, or Story.
11. **Status Bar:** Displays data about the fields and marks included in the view.

Icons and Visual Cues for Fields

In the Data Pane and the Worksheet/View, Tableau displays visual cues. Each of the field icons can be modified in the Data Pane by one of four indicators:

| Icon/Cues | Description |
|-----------|---|
| | Blue icons indicate that the field is discrete. |
| | Green icons indicate that the field is continuous. |
| | Icons preceded by the equal sign (=) indicate that the field is a user-defined calculation or a copy of another field. |
| | Icons with an exclamation mark next to them indicate that the field is invalid. |
| | Move between the active data source or sheet and the Start Page. When on the Start Page, the icon is black. When on an active data source or sheet, the icon is in color. |
| | Undo Button: The left-facing arrow will undo your last action. |
| | Redo Button: The right-facing arrow will redo your last action. |
| | Show/Hide Cards: Use this to edit the cards displayed. |
| | Swap: Use this icon to swap, quickly, axes of a visualization. |
| | Text Values |
| | Numeric Values |
| | Date Only Values |
| | Date & Time Values |
| | Geographical Data |
| | User-Defined Set |
| | Boolean (True/False) Values |
| | Group |
| | A blue field on a shelf indicates a discrete field. |
| | A green field on a shelf indicates a continuous field. |
| | A (SORT) icon indicates a sorted field. |

| | |
|---------|---|
| Profit | The delta icon indicates that the field has a table calculation applied to it. |
| Region | The plus and minus controls appear when the field is part of the hierarchy in which you can drill up or down. |
| Quarter | |

Getting Started in Tableau Desktop

The Tableau Workspace is made up of menus, a toolbar, the Data and Analytics panes, cards and shelves, and one or more sheets (worksheets, dashboards, and/or stories).

Data Pane

| Component | Description |
|-------------------|---|
| Dimensions | Fields that contain category data such as text and dates. Dimensions create the axis headers in a view. |
| Measures | Fields that contain numbers that can be aggregated. Measures create the axes in a view. |
| Parameters | Author-defined variables that can replace constant values in calculated fields and filters. |
| Sets | Subsets of data that are defined by you. |

Analytics Pane

| Component | Description |
|------------------|---|
| Summarize | Includes options to add pre-defined components such as constant and average lines, medians with quartiles, box plots, and totals. |
| Model | Adds modeling information to your view, such as trend lines, forecasting, and average distribution band. |
| Custom | Add custom lines, bands, and box plots. |

View Components

The View area is where you create your visualization. It is located to the right of the Side Bar. Drag items from the Side Bar to the View to begin creating your visualization.

| Component | Description |
|-------------------------|--|
| Columns and Rows | Drag dimension and measure fields to these shelves to define how you want the data shown in the view. |
| Pages | Show data changes over time or across discrete dimensions. |
| Filter | Drag fields to the Filters shelf to limit the number of members shown. Exposed filters in a dashboard allow others to control how they view the visualization. |
| Marks | Data as shown in the visualization. Bars, circles, pies, text, and lines are examples of Marks. |

| | |
|-------------------|---|
| Marks Card | Tools used to change the appearance of “mark” types. |
| Worksheets | The tabs across the bottom of the view correspond to the worksheets contained within the entire workbook. To add a new worksheet, click the New Worksheet tab and a new worksheet displays. |

When you connect to data, Tableau categorizes your data fields as Dimensions (discrete categories of data) and Measures (numeric data values). When you drag a dimension or measure into a view, the Tableau visualization process transforms your data into Marks, which are the visual form your data takes. Marks can be bars, lines, dots, shapes, numbers, or text.

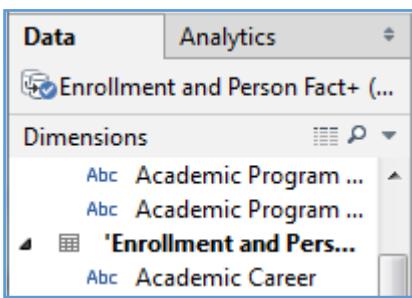
You would use the Marks card to change the attributes of the marks in your view. You can change the color, size, or mark type.

Editing Attributes

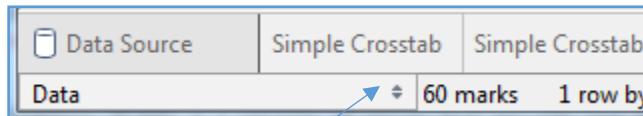
| To ... | Do This ... |
|-----------------------------------|--|
| Change the mark type | On the Marks card, select the drop-down menu and choose the mark type. |
| Change colors | Choose Color to access the color menu options. |
| Adjust mark size | Choose Size, and use the slider to adjust the size. |
| Change label | Choose Label to access the label menu options. Options available are dependent on selections you make. NOTE when TEXT is selected from the Marks dropdown, Label appears as Text. |
| Add Details | From the Data window, drag a dimension field to Detail to separate the marks in the view according to members of a dimension. Using details brings more data into a view without changing the table structure. |
| Edit Tooltip | Choose Tooltip, and in the Edit Tooltip dialog box, edit the details of the tooltip. |
| Assign values to Pie chart | On the Marks card, choose Pie from the drop-down menu, and drag a measure to Angle. Note: Angle only displays when Pie is selected. |
| Control the path of a line | On the Marks card, choose either Line or Polygon from the dropdown menu, and drag a dimension to Path. Note: Path only displays when Line or Polygon is selected. |

Helpful Hints

You can minimize your Data window by clicking the double arrow at the upper right corner of the window.



If you've minimized the Data window, it will collapse to the bottom status bar. You can restore the window again by clicking the same double arrow icon.



If you've accidentally hidden a card and want to show it again, there are two ways to do this.

1. Select the **Worksheet** menu and **Show Cards** option.
2. Click the **Show/Hide Cards** icon (shown to the right).



Data Sources

Tableau Desktop is a tool that allows you to connect to nearly any data source. These include Excel, Access, server sourced and cloud based data. You can also easily join multiple data sources for your visualizations. This can be useful when you need to include details from more than one source. For example, you may have performed a survey to find the effectiveness of a program. In order to determine whether the results varied by select demographic details, you might want to join the survey participant information with the personal details from a human resources database. By doing this, you could greatly enrich your reporting capabilities without overwhelming the survey takers with identifying information. This capability within Tableau allows you to move easily beyond previous reporting constraints.

However, with this ability comes a new responsibility. It's *extremely important* to understand fully the data on which you are reporting. Because you will be creating new joins and providing subsequent visualizations, it's important to know that the results are accurate. As you learn, validate your data by running queries from the warehouse or in other proven methods to ensure your counts are correct. Likewise, since you have the ability to create new data connections, it is your obligation to ensure you are not sharing any confidential material. This is discussed in depth in the following section.