Introduction to Tableau

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Overview

- Download & Install Tableau
- Introduction
- Prepare data to transform to a visual
- Work with Tableau
  - Intro to Tableau Interface
  - Connecting to data
- Create the visual
  - Overview of a worksheet
  - Create worksheets
- Create an interactive dashboard
- Save/Publish
- Additional Resources

Step 1: Download & Install Tableau

Everyone can download Tableau Public for free from **https://public.tableau.com/en-us/s/download**

Once it's installed, go to **https://public.tableau.com/s/** to sign up for an account/profile.

Tableau Academic Program:**https://www.tableau.com/academic**

The student/Instructor license expires after one year; you can request a new license each year as a full-time student.

What is Tableau?

An interactive data visualization software that allows you to tell a story about your data.

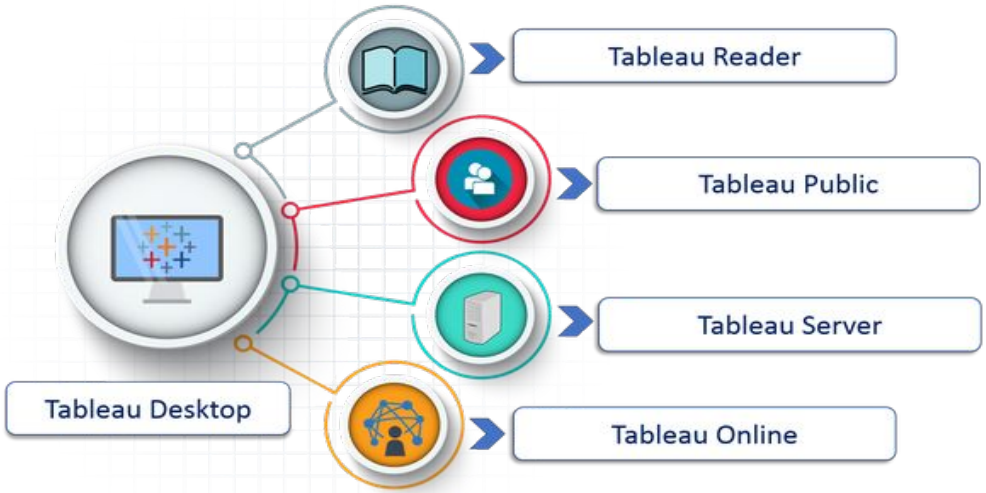


Tableau Family

Tableau offers five main products which are:

https://www.tableau.com/products

Developer Tools
❖ **Tableau Desktop**
❖ **Tableau Public**

Sharing Tools
❖ **Tableau Server:** Collaboration in organizations
❖ **Tableau Reader:** Let you read files saved in Tableau Desktop
❖ **Tableau Online:** Similar to Tableau Server (On Cloud)

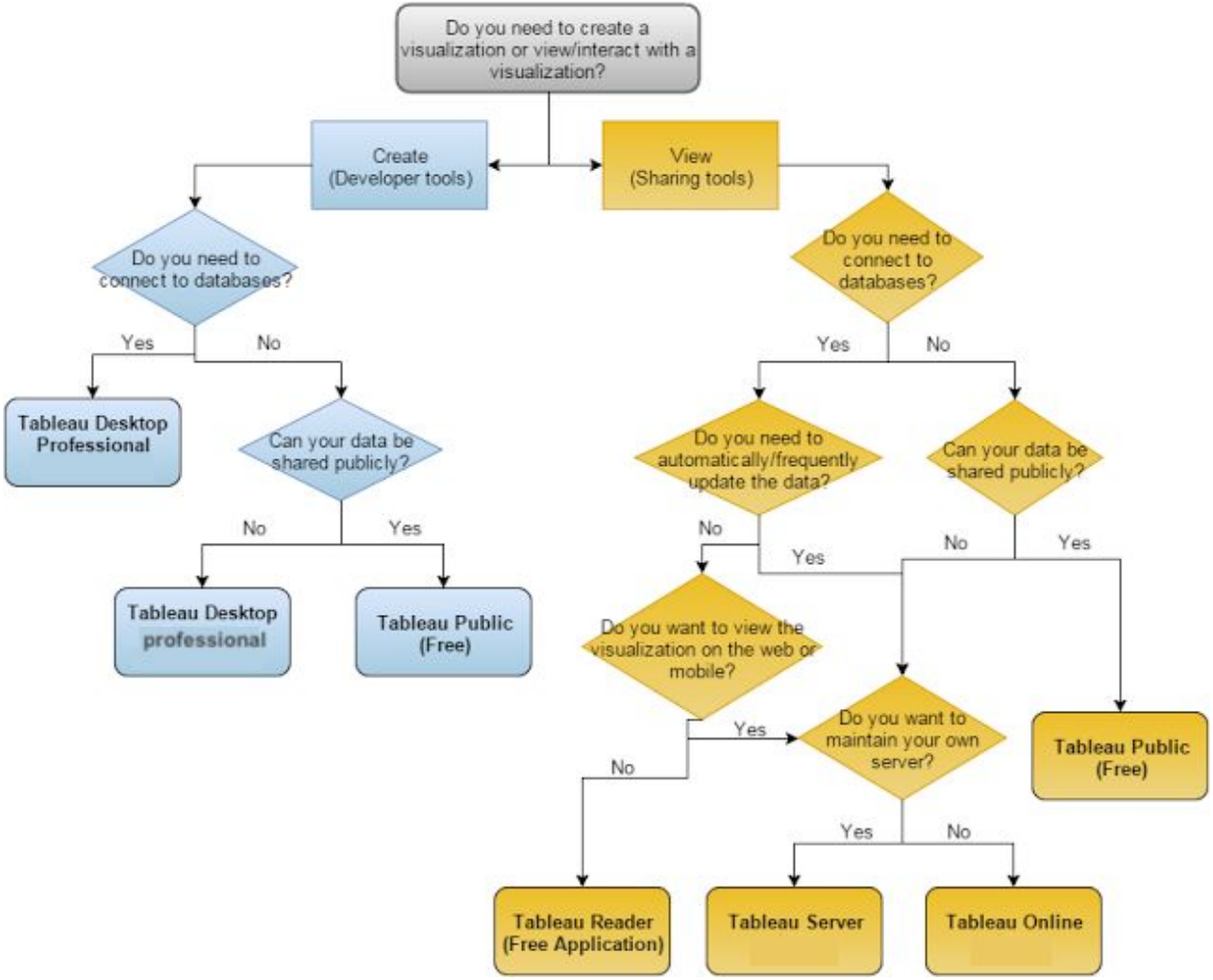

Do you need to create a visualization or view/interact with a visualization?
Create (Developer tools)
View (Sharing tools)
Do you need to connect to databases?
Yes
No
Tableau Desktop Professional
Can your data be shared publicly?
No
Yes
Tableau Desktop professional
Tableau Public (Free)
Do you need to connect to databases?
Yes
No
Do you need to automatically/frequently update the data?
Can your data be shared publicly?
No
Yes
No
Yes
Do you want to view the visualization on the web or mobile?
Yes
No
Do you want to maintain your own server?
Tableau Public (Free)
Yes
No
Tableau Reader (Free Application)
Tableau Server
Tableau Online

Tableau file types:

- **Tableau Workbook (.twb)**

It relies on a live data source connection and doesn't contain the actual data within the workbook file.

- **Tableau Packaged Workbook (.twbx)**

It contains both the Tableau workbooks and the data!

Workbooks are made up of:

- **Worksheet(s):**

  Worksheets are where you create your visualization.

- **Dashboard(s):**

  It is a canvas that displays one or more worksheets.

  Example: Visual Vocabulary by Andy Kriebel

- **Story(s):**

  Enables you to snapshot visualizations and step a user through a story.

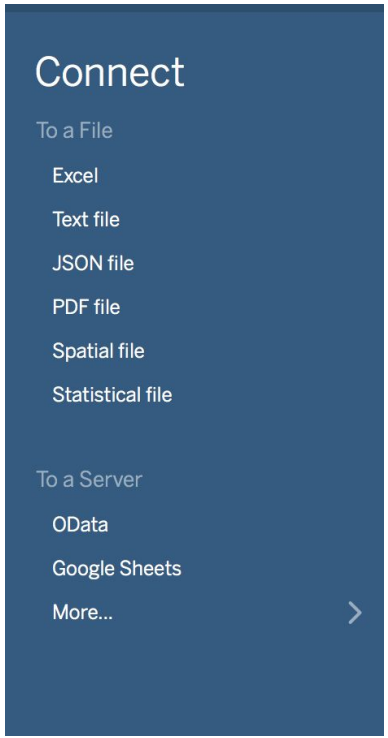
  Example: Race to Alaska by Anthony Gould

Step 2: Getting Started with Tableau

- The dataset we will use in this workshop can be downloaded from **https://github.com/BCDigSchol/coffee-code**

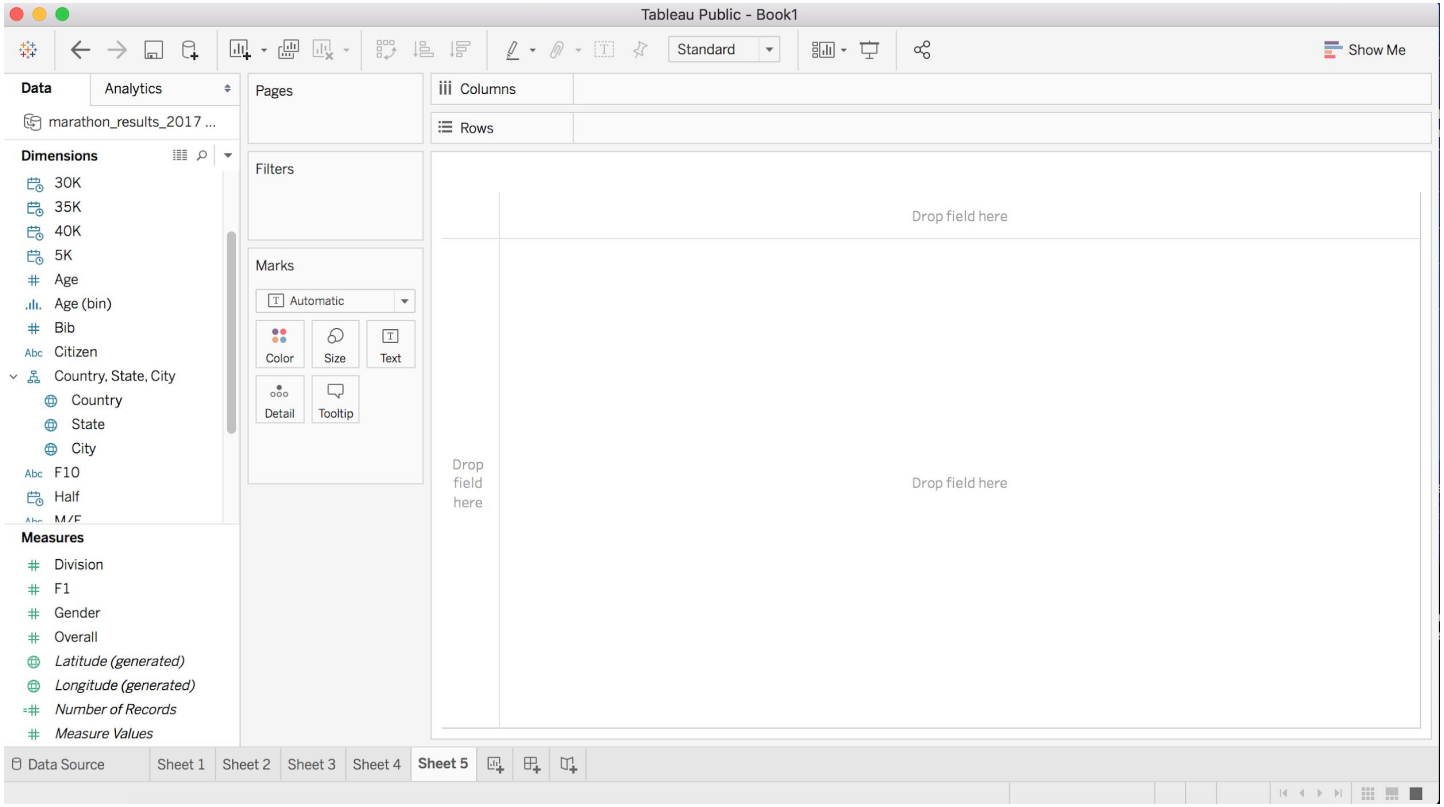
2017 Boston Marathon Runner Statistics

Step 3: Connecting With Data

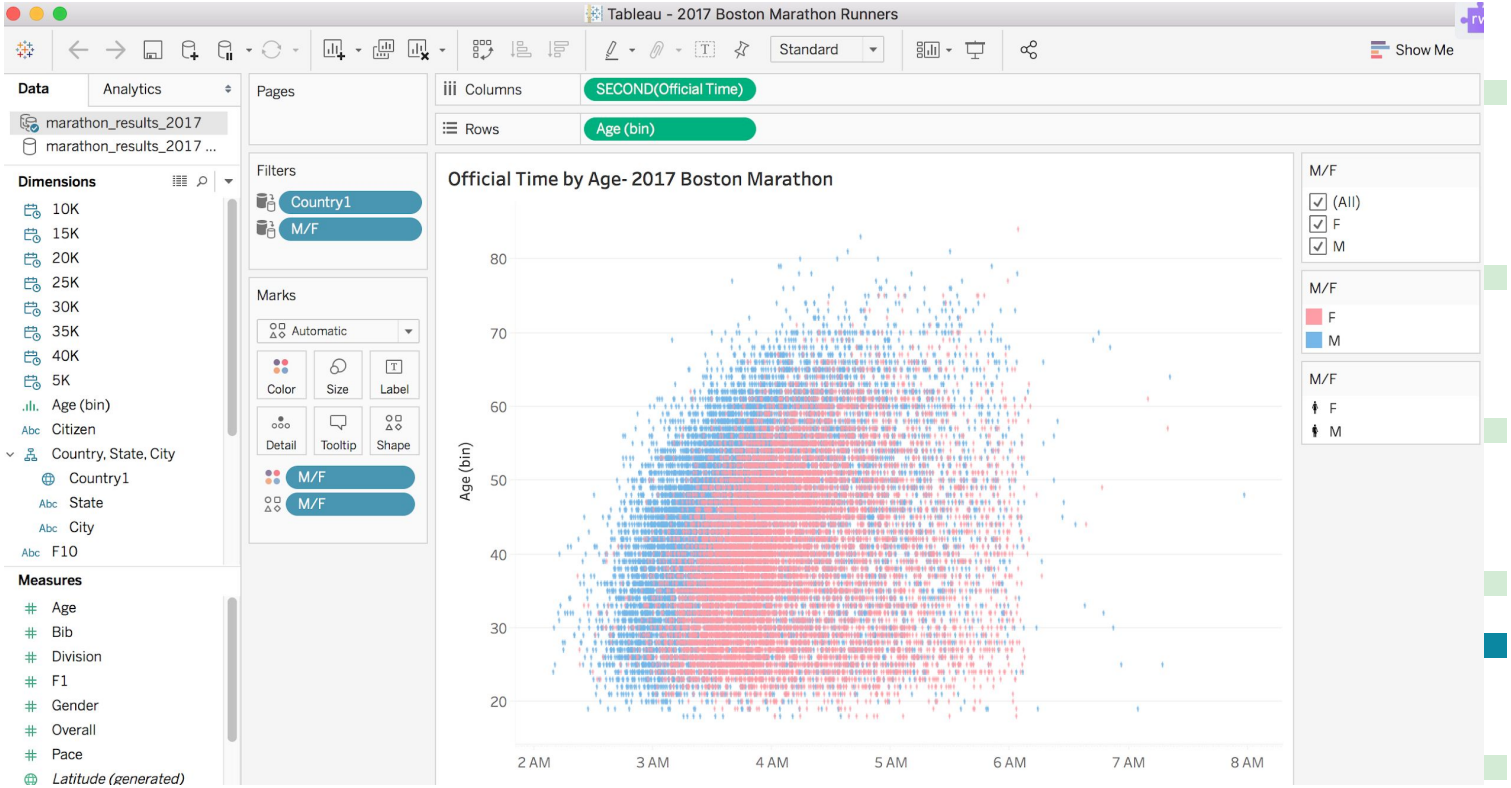


To connect to an excel file, click “Excel” on the left hand side. Navigate to the file on your computer and double click to open it.

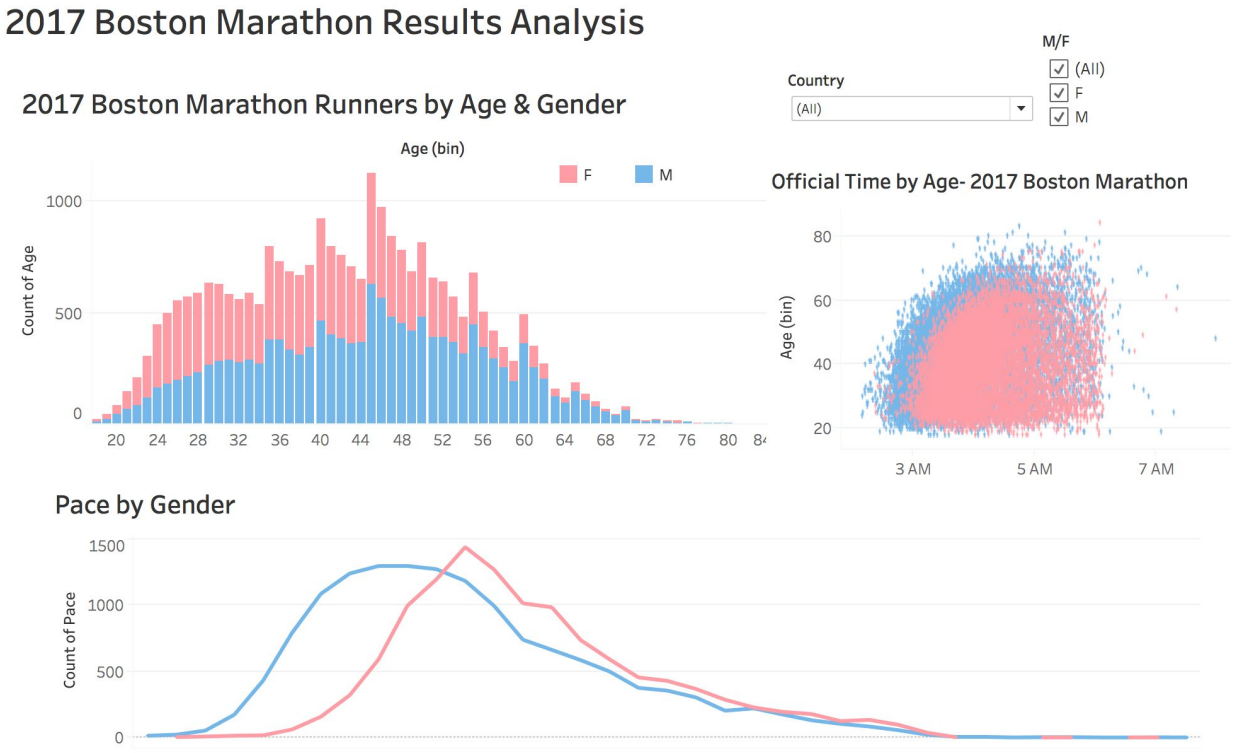
Step 4: Tableau Workbook Interface



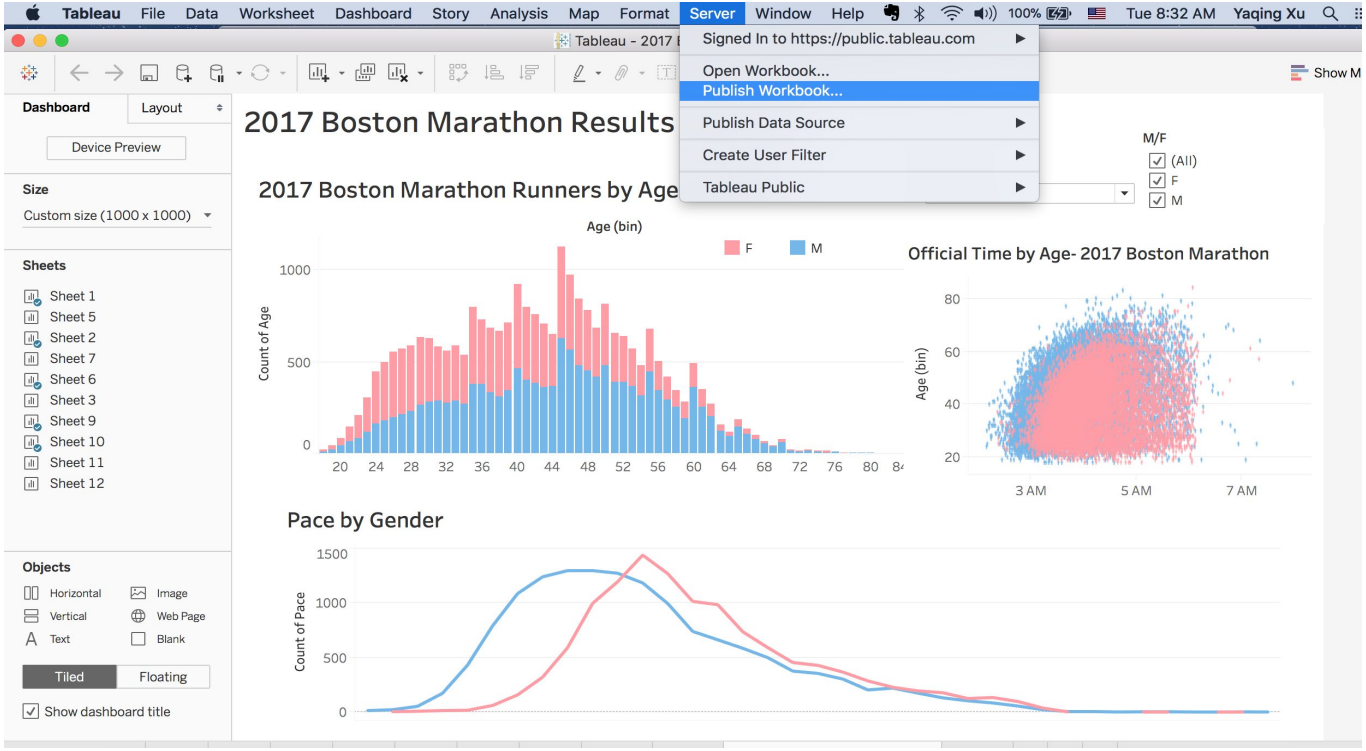
Step 5: Creating Views and Analysis



Step 6: Create an interactive dashboard



Step 7:Save and Publish



Additional Resources

- Tableau Community

Join the Tableau Community Forums to find solutions for what you need to accomplish. Ask questions to receive help and feedback.

- Tableau Visual Gallery

Get inspired by the many interactive visualizations in the Visual Gallery. Download the workbooks to play with on Tableau Desktop

- How-to Videos
- Lynda.com

THANKS!

Any questions?