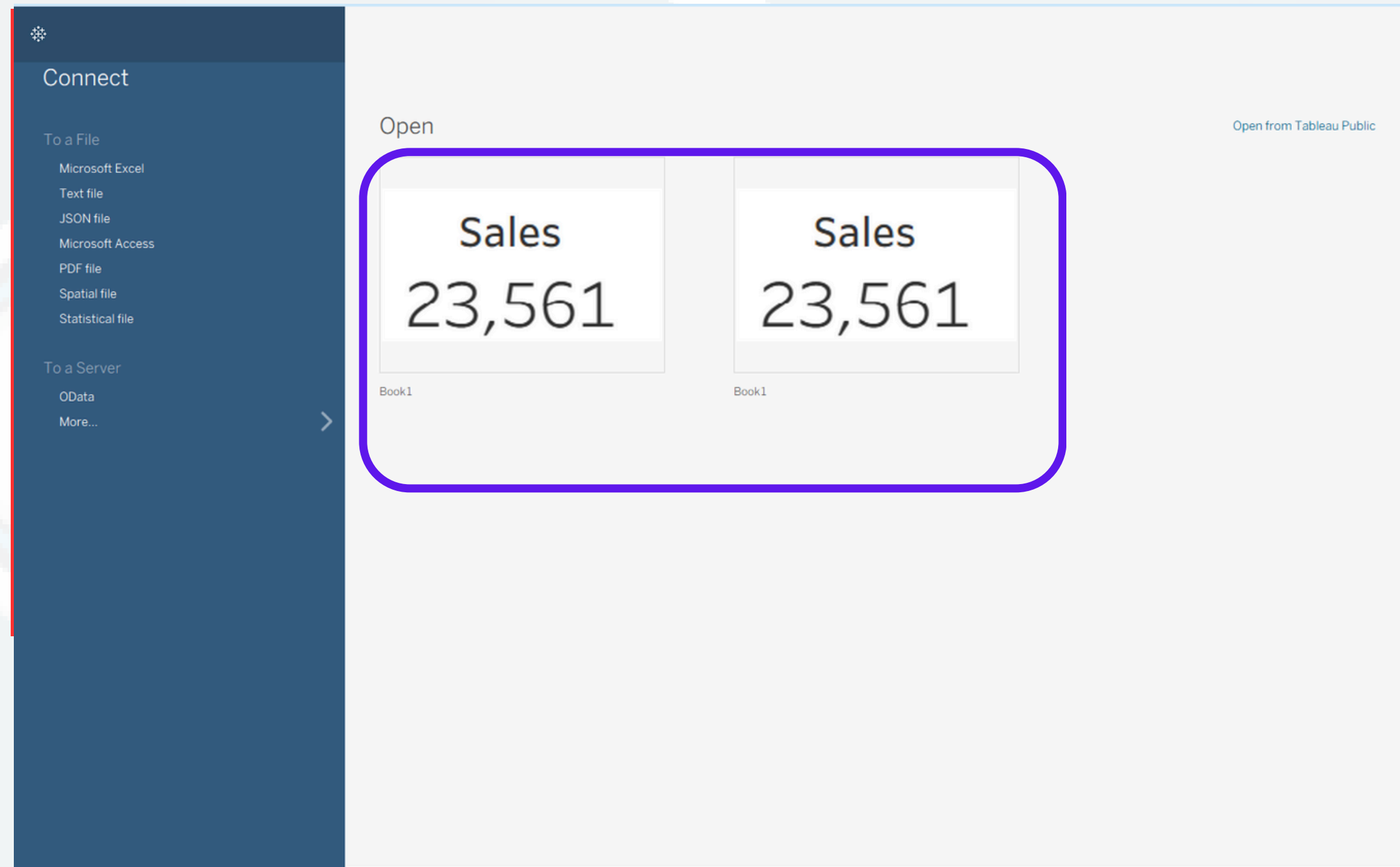# Tableau Overview

Data Connection and Recent Work

Data Connectors

Tableau offers extensive connectivity options, allowing users to integrate data from various sources. You can connect directly to files such as Microsoft Excel, Text, JSON, PDF, and Spatial files, as well as to servers using protocols like OData. This flexibility ensures you can pull data from virtually any business system for analysis.

Recent Works

The interface provides quick access to recently used workbooks, such as "Book1" which contains sales data (e.g., "Sales 23,561"). It also offers the option to open workbooks saved to Tableau Public, facilitating easy access to your latest projects and dashboards for continued analysis or sharing.

Connect

To a File

Microsoft Excel
Text file
JSON file
Microsoft Access
PDF file
Spatial file
Statistical file

To a Server

OData
More...

Open

Open from Tableau Public
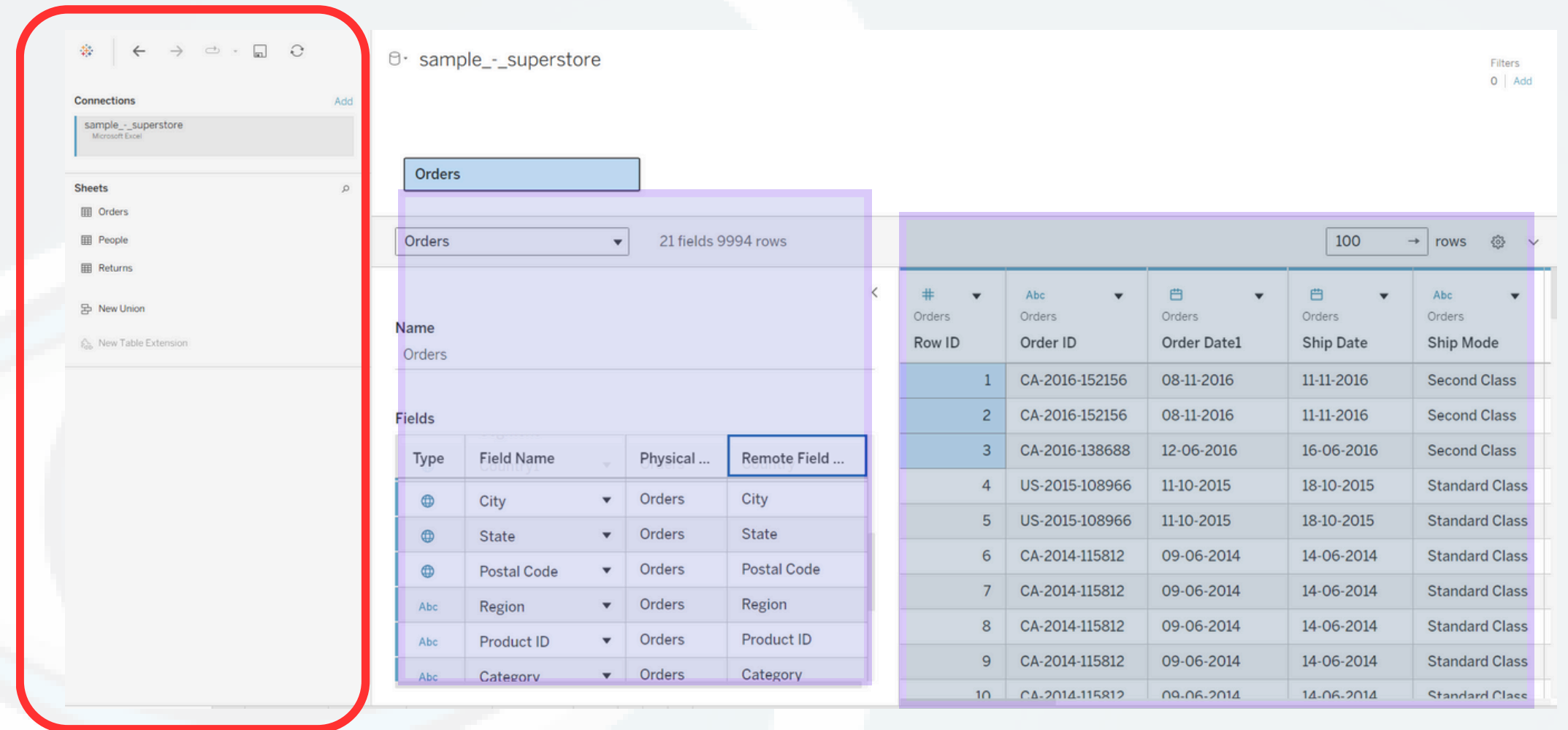
Sales
23,561
Book1

Sales
23,561
Book1

Data source management interface

Data Source Name & Tables: The top section shows the connected data source is named "Gamecabers." It contains several tables or sheets, including
- **Sheets** (which seems to be a container for Orders, People, and Returns)
- **Orders** (which is the active table being inspected)

Table Preview & Metadata: The main area is dedicated to the Orders table, providing its metadata and a sample of the data.
- It states the table has 21 fields (columns) and 9,994 rows.
- A list of some fields is shown, such as City, State, Postal Code, Region, Product ID, and Category.

1. **Data Sample:** The grid at the bottom displays the first 10 rows of the Orders table. Key columns visible include:
2. Row ID, Order ID, Order Date, Ship Date, Ship Mode (e.g., "Second Class," "Standard Class")

This interface is used to connect to, view, and understand the structure of your data before creating visualizations. You can see the available tables, the fields they contain, and a preview of the actual data to plan your analysis.

Blank worksheet

1. The Canvas (Central Area)
- **This is the large, empty area labeled "Drop field here."**
- **Purpose: This is where your charts, graphs, and maps will visually appear once you start dragging fields onto it.**

2. The "Shelves"
These are the areas where you place data fields to build your visualization.
- **Rows Shelf (Vertical "Drop field here"): You drag fields here to create the vertical axis of your chart.**
- **Columns Shelf (Horizontal "Drop field here"): You drag fields here to create the horizontal axis of your chart.**

3. Marks Card
1. This is the panel (not fully shown, but implied by the "For map use" text) that controls the appearance of your data points (or "marks"), such as their color, size, label, and detail.
2. Purpose: It allows you to encode data into visual properties.
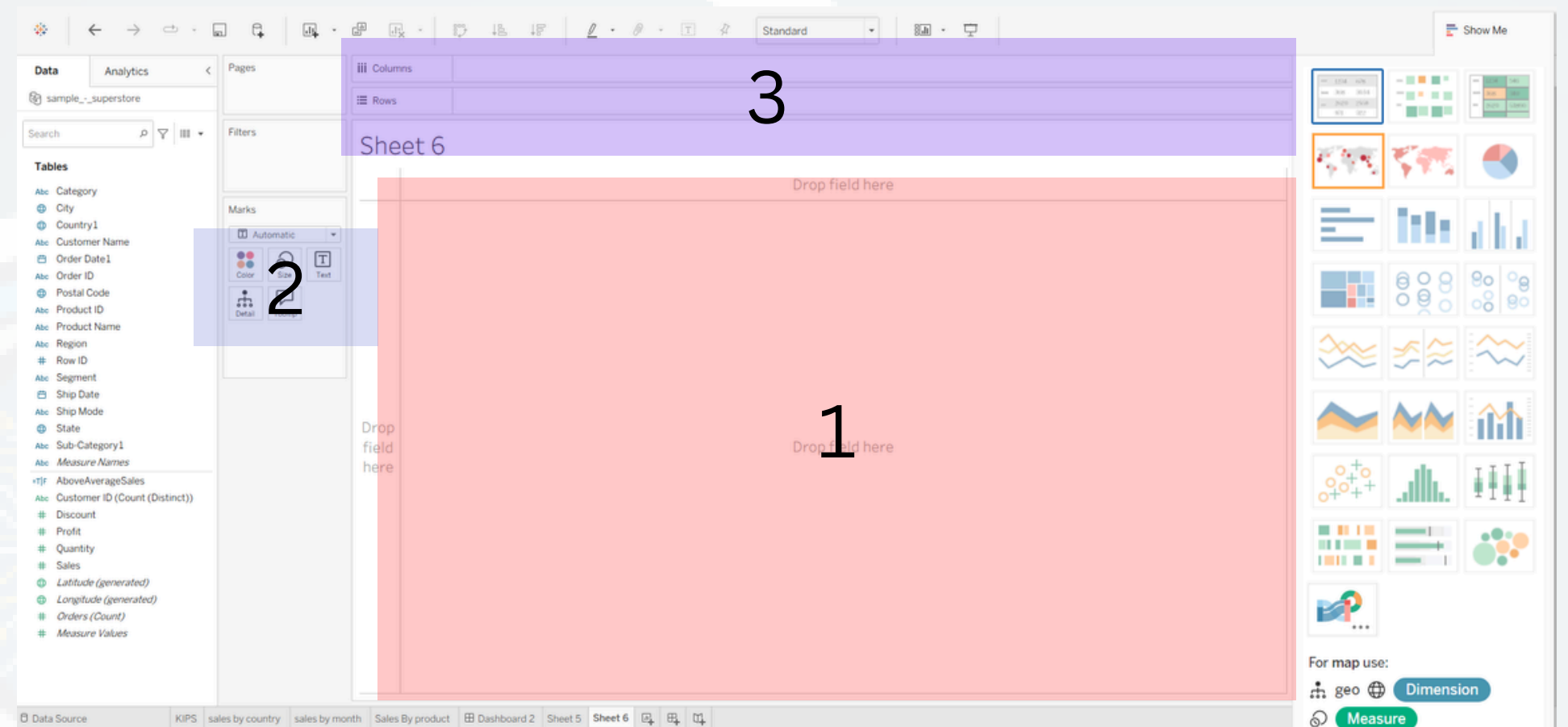
Blank worksheet

### 4. Data Pane (Left Sidebar - Implied)

While not fully visible, the text "Dimension" and "Measure" refers to the Data Pane, which is always on the left side of a Tableau worksheet.

- **Dimensions:** These are typically qualitative, categorical fields (e.g., Customer Name, Product Category, Country). They often create headers when placed on a shelf.
- **Measures:** These are quantitative, numerical fields that can be aggregated (e.g., Sales, Profit, Quantity). They create axes when placed on a shelf.

5. Special Note: "For map use: go"

This is a specific instruction for creating a map.

- **How to do it:** To create a map, you typically double-click on a geographic field (like "Country," "State," or "City") from your Dimensions. Tableau will automatically generate a map view on the canvas and place the geographic roles on the "Marks" card.
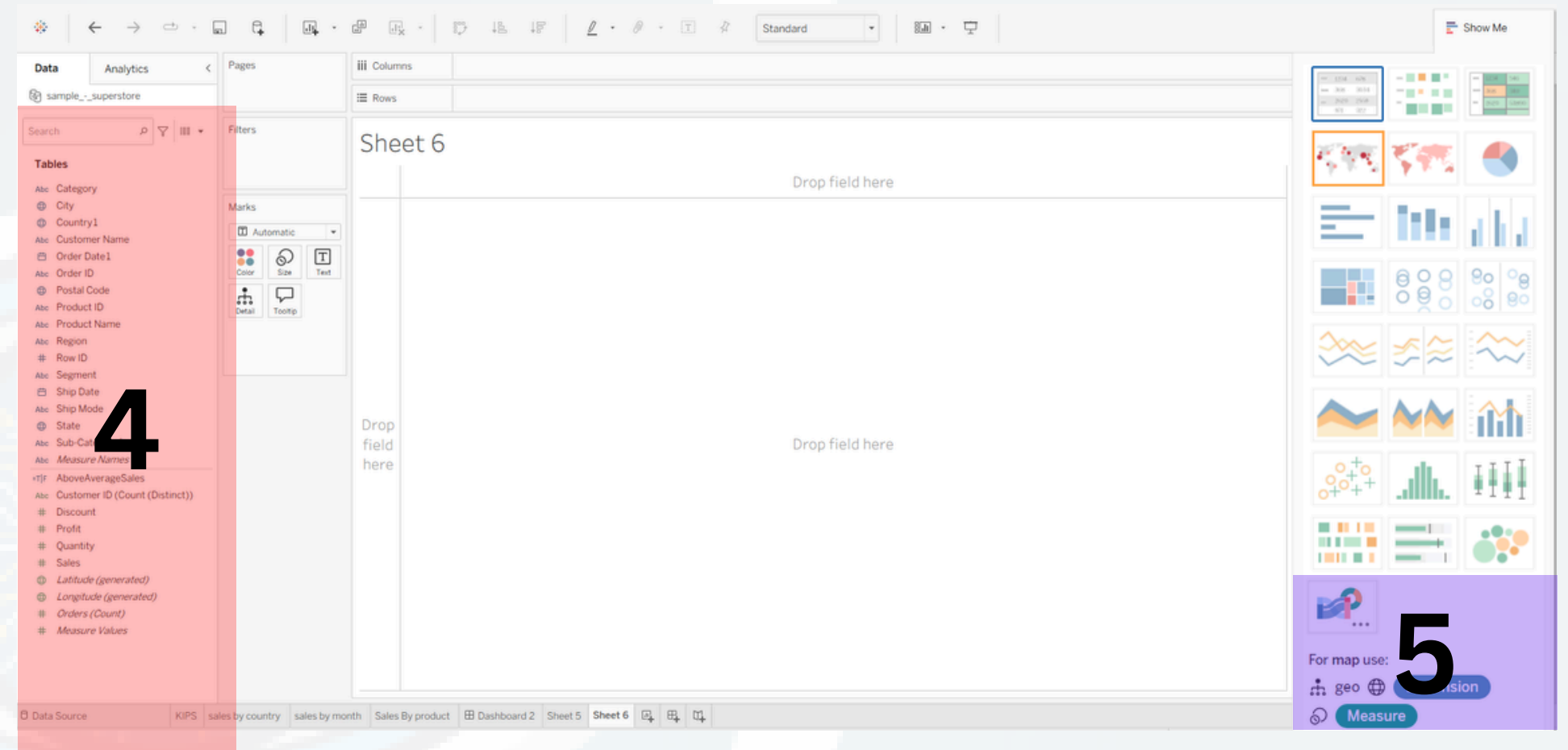
In Simple Terms:

This is a blank canvas for creating a chart. You build visualizations by dragging your data fields (like "Sales," "Profit," "Country") from the left sidebar and dropping them onto the Rows and Columns shelves to create the structure, and then use the Marks card to add colors, sizes, and labels.

Blank worksheet

6. Analytics Pane

This pane is used to add statistical and reference elements to your visualization to provide deeper context. The options are grouped into categories:

- **Summarize:** Adds lines or totals that describe your existing data.
  - Constant, Average, Median Lines: Draws a reference line based on a fixed value or the average/median of your data.
  - Box Plot: Adds a box plot to show the distribution and outliers of your data.
  - Totals: Displays grand totals for your view.
- **Model**: Adds statistical models that analyze your data.
  - Trend Line: Shows the general trend or pattern in your data.
  - Forecast: Predicts future values based on historical data.
  - Cluster: Groups similar data points together automatically.
- **Custom**: Allows you to create customized reference lines or bands.

on a specific subset of your data by hiding the rest.
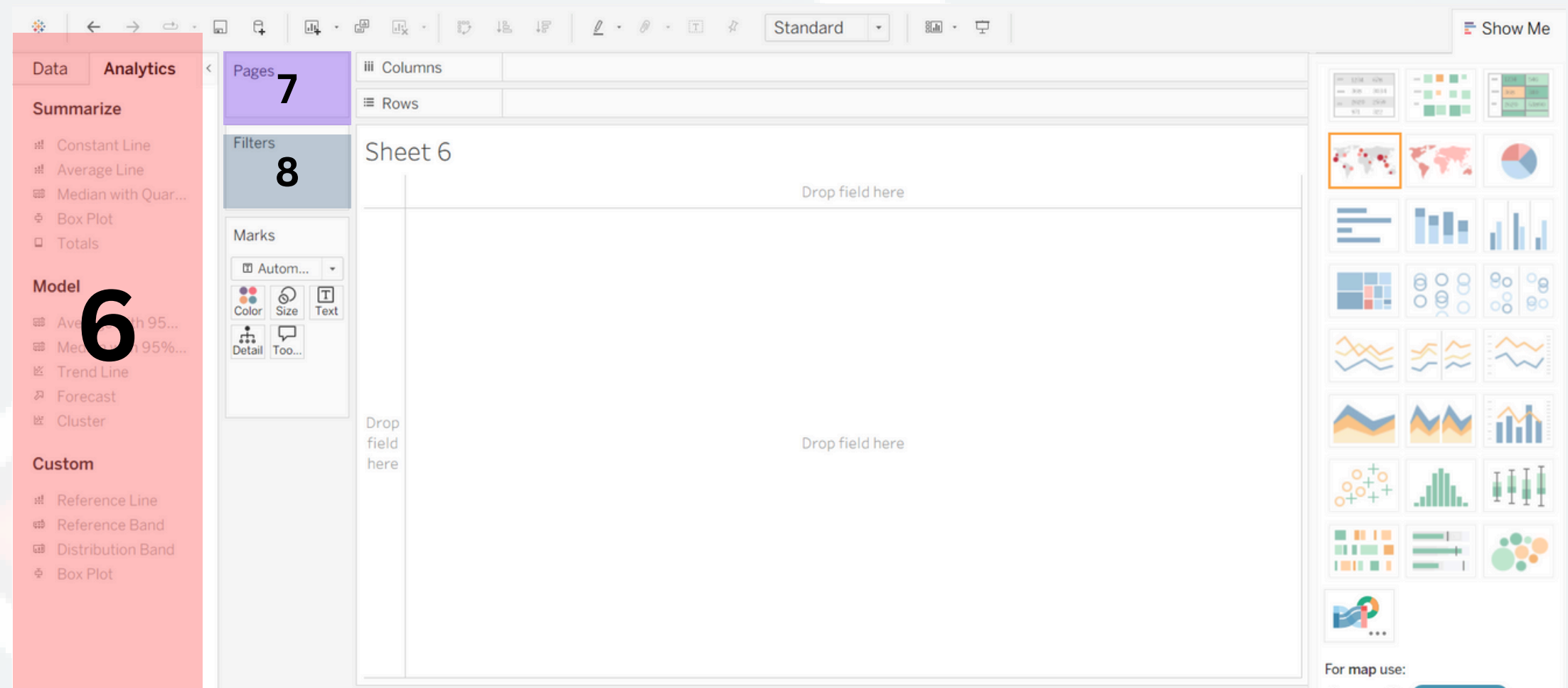
7. Pages Shelf

This shelf turns your visualization into a flipbook or animation.

- You drag a field (typically a date or category) here.
- Tableau creates a series of "pages" or frames for each value in that field.
- You can play through the pages to see how the data changes over time or across categories.

In short: The Pages shelf is for showing change over time or across categories through animation.

8. Filters Shelf

This shelf is used to narrow down the data that is displayed in your view.

- You drag any field (e.g., "Region," "Product Category," "Date") here.
- You can then set rules to include or exclude specific data points (e.g., only show data for "the West Region" or "Sales greater than $1000").

In short: The Filters shelf is for focusing on a specific subset of your data by hiding the rest.

Blank worksheet

9. Sheets & Navbar

- **Sheets**: These are the individual tabs at the bottom of the screen (like "Sheet 6"). Each sheet is a separate canvas where you build a single chart or visualization.
- **Navbar (Top Bar):** This is the main menu at the very top of the application.
  - Data: Manage your data sources and connections.
  - Analytics: Add statistical features like trend lines and forecasts.
  - Map: Customize the background maps for geographic data.
  - Format: Change the appearance and style of your charts.
- **In short**: Sheets are your individual charts; the Navbar is the main menu for tools and options.
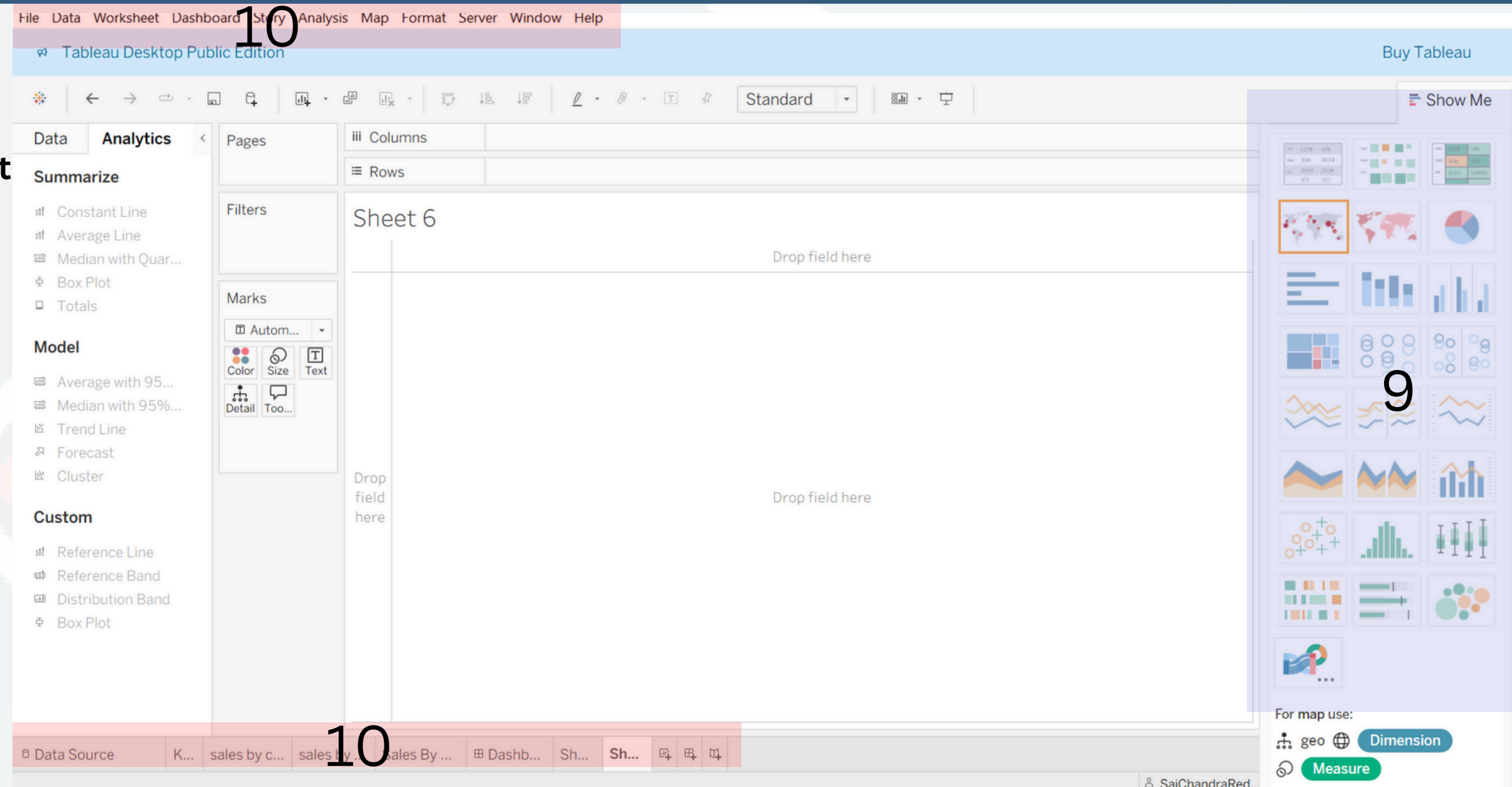

10.Show Me

- **What it is**: An intelligent "chart suggestion" panel, usually located in the top-right corner.
- **What it does**: It automatically recommends the best chart type based on the data fields you have selected. You can click on any chart icon (like a bar chart, map, or line graph) to instantly create that visualization.
- **In short**: A quick-click tool for automatic chart creation.

Blank DashBoard

- **This is the Dashboard interface in Tableau, where you combine multiple individual charts ("Sheets") and objects into a single, interactive layout for presentation.**

Key Components Explained:

- **Layout & Size:** Controls the dashboard's dimensions and how it adapts to different devices like Desktop (Default) or Phone.
- **Sheets:** A list of all your individual charts that you can drag and drop onto the dashboard canvas.
- **Objects:** Additional items you can add, like:
  - **Image:** For logos or pictures.
  - **Text:** For labels and explanations.
  - **Blank:** For adding spacing and layout structure.
  - **etc....**
- **Tiled vs. Floating:** Choose whether elements snap into a grid (Tiled) or can be placed freely on top of each other (Floating).
- **Canvas:** The main area labeled "Drop sheets here" where you build your dashboard by arranging the sheets and objects.
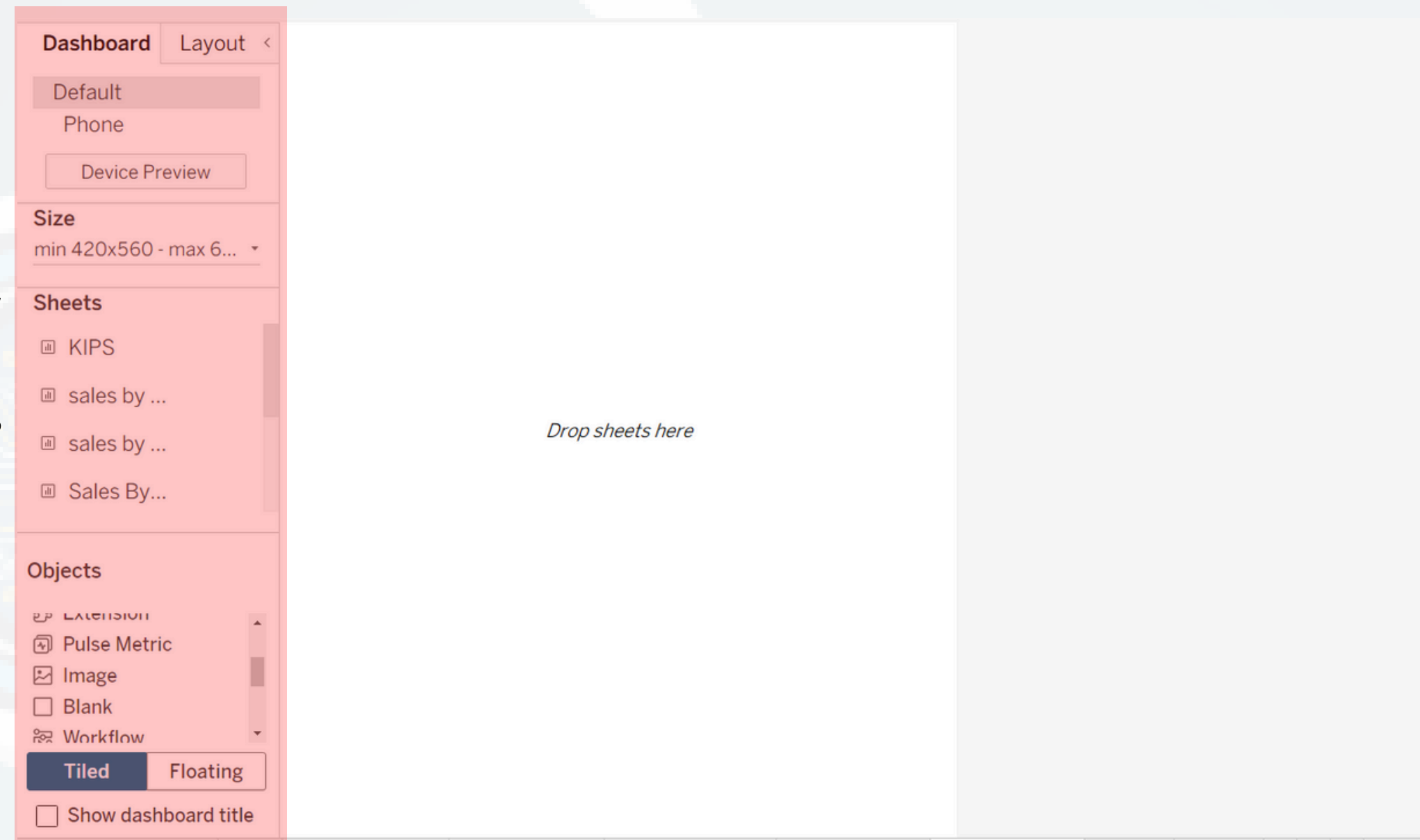
- **In short:** This is the workspace for building a final, polished report by bringing all your separate charts together into one unified view.

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