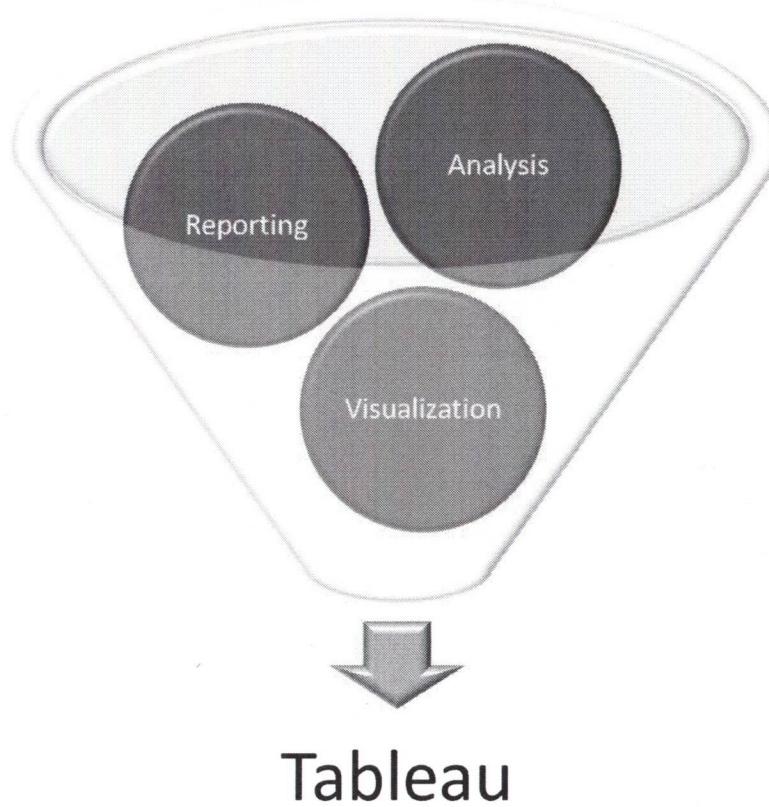


# Tableau Overview – Uses, Practices, & Current Implementations

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## What is Tableau?



## Why Tableau?

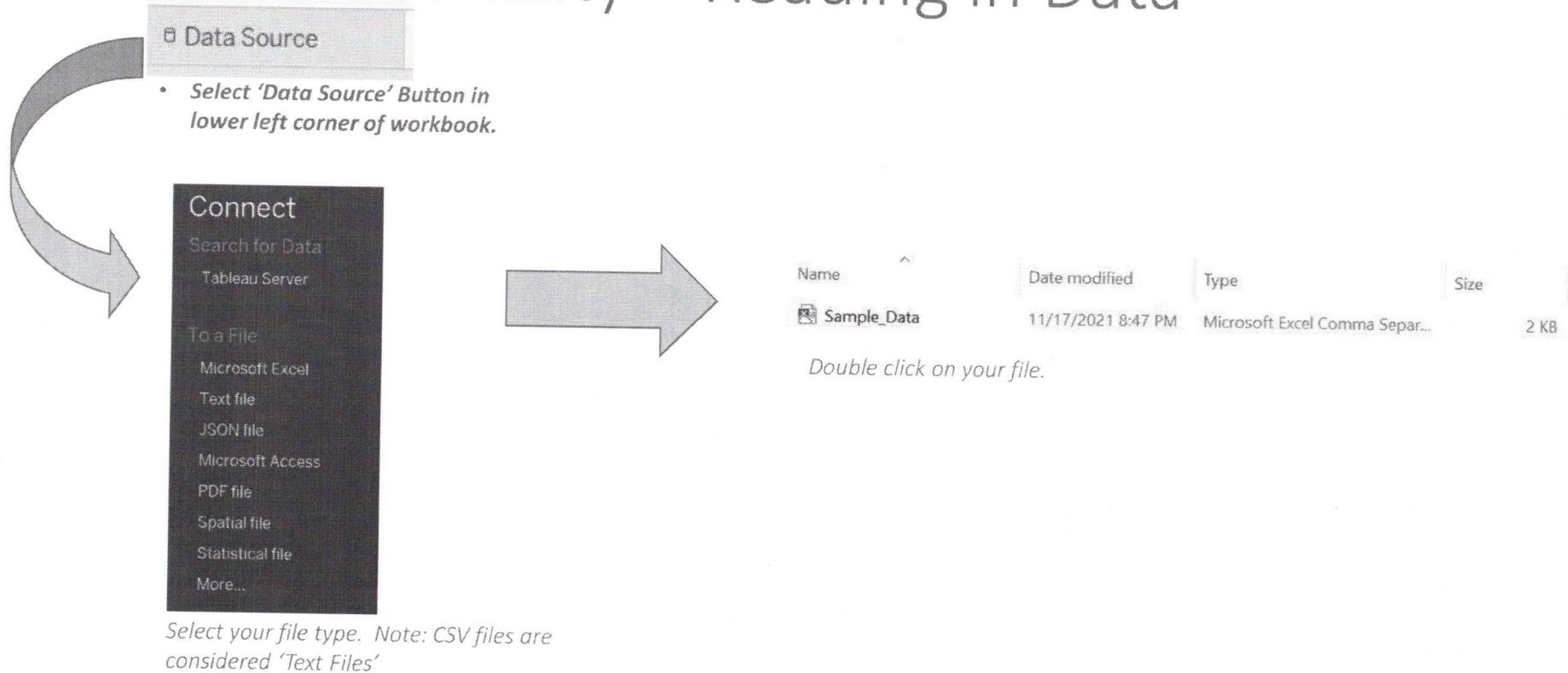
- **Technical Capabilities**

- Handles up to 15GB of data compared to Excel's 0.5GB at best
- Links with common scripting languages such as Python to enable quick data refreshing even with complex transformations and mappings
- Incorporate both qualitative and quantitative data
- Link to company data systems

- **End User Experience**

- Highly dynamic reporting
- Quickly share reporting with just a hyperlink
- Enables Automated high-level view while also allowing ability to drill deep into the data
- Insightful visualization toolkit

# Basic Functionality – Reading in Data



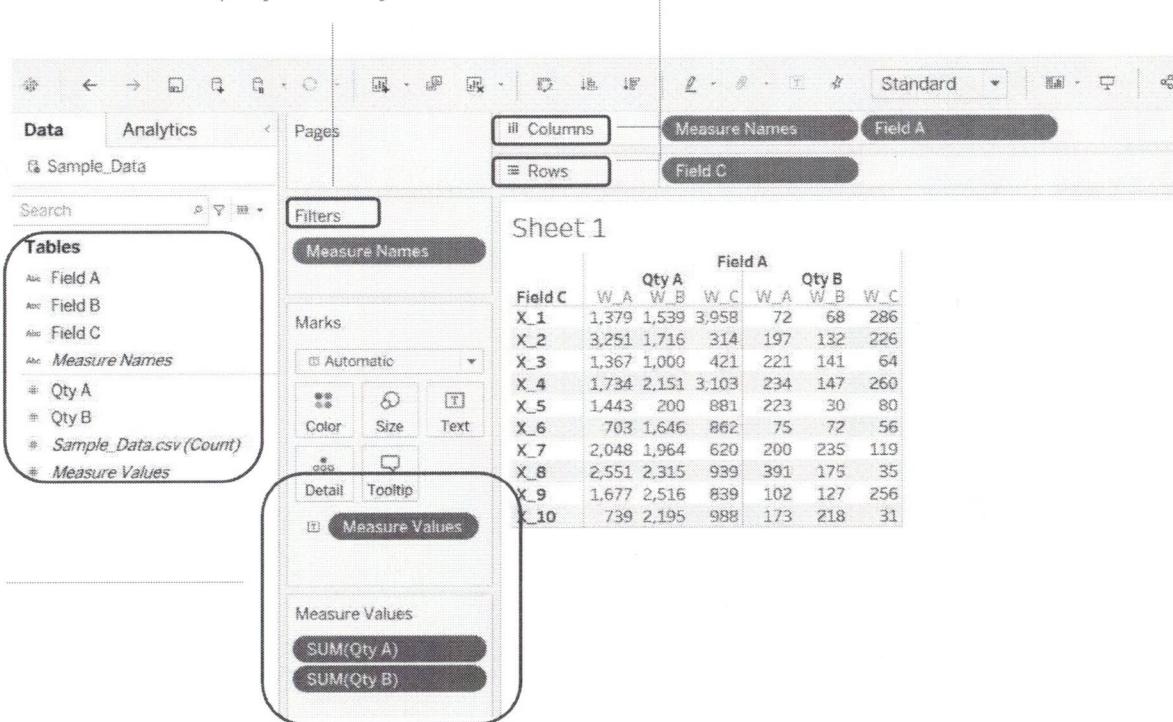
# Basic Functionality – Pivoting Data (Just think of Pivot Tables!)

Apply filters to get to specific slices of data

Just like an Excel pivot table, drag and drop fields to your rows and columns to pivot data.

Available fields from your data source.

Drag quantitative fields here



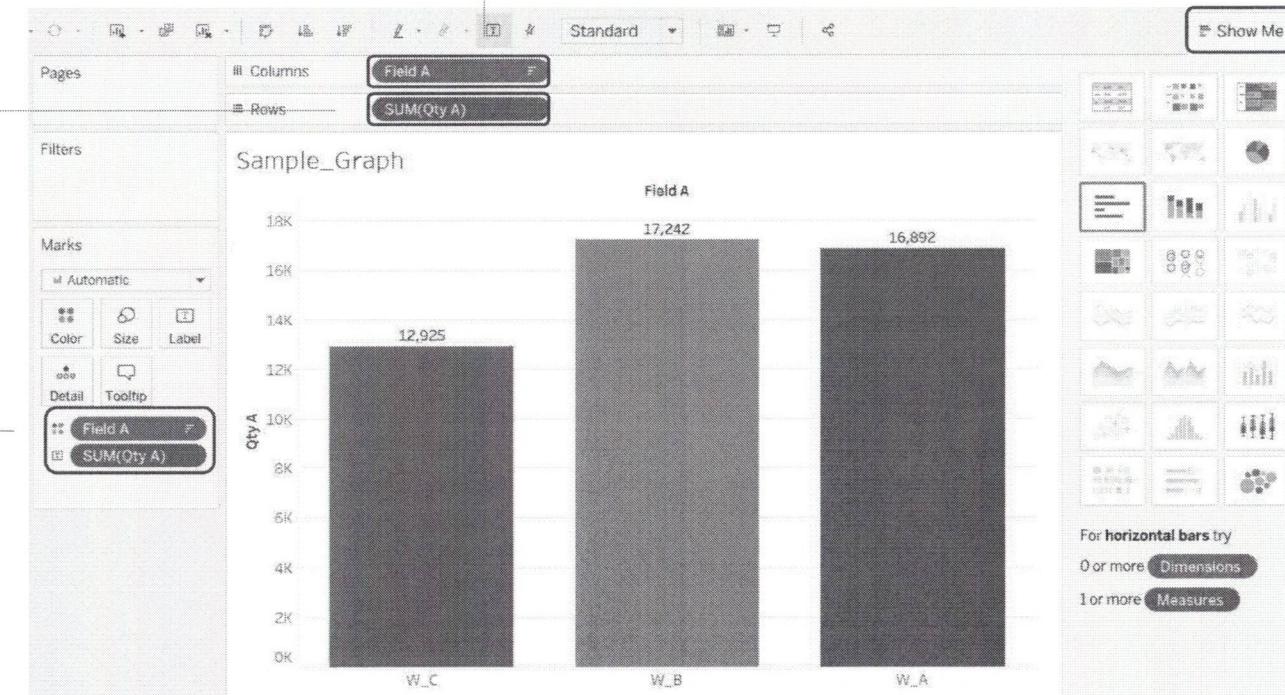
# Basic Functionality – Charts (Just think of Pivot Charts!)

Display values above columns

Define data partition

Click 'Show Me' to see available charts

Define what is being summed, note that 'Field A' has been assigned to the color, so each column is a unique color.



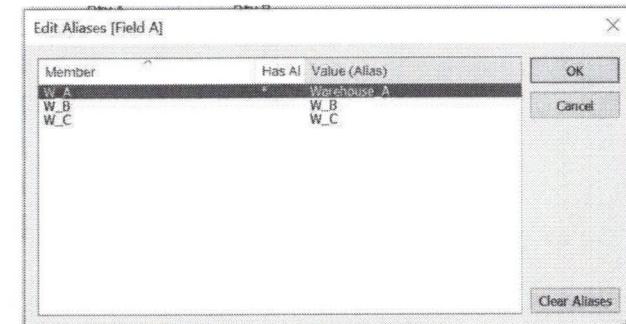
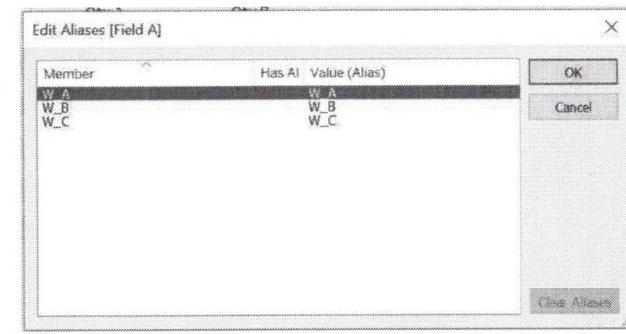
# Basic Functionality – Formatting



Just like excel,  
numbers can be  
formatted as  
currency, fixed  
number of  
decimals, etc.

Right click on any  
field to open a  
formatting  
interface by clicking  
'Format'

Right click on any field and select 'Edit Aliases'. This will enable you to change variable names



# Basic Functionality – Waterfall Charts

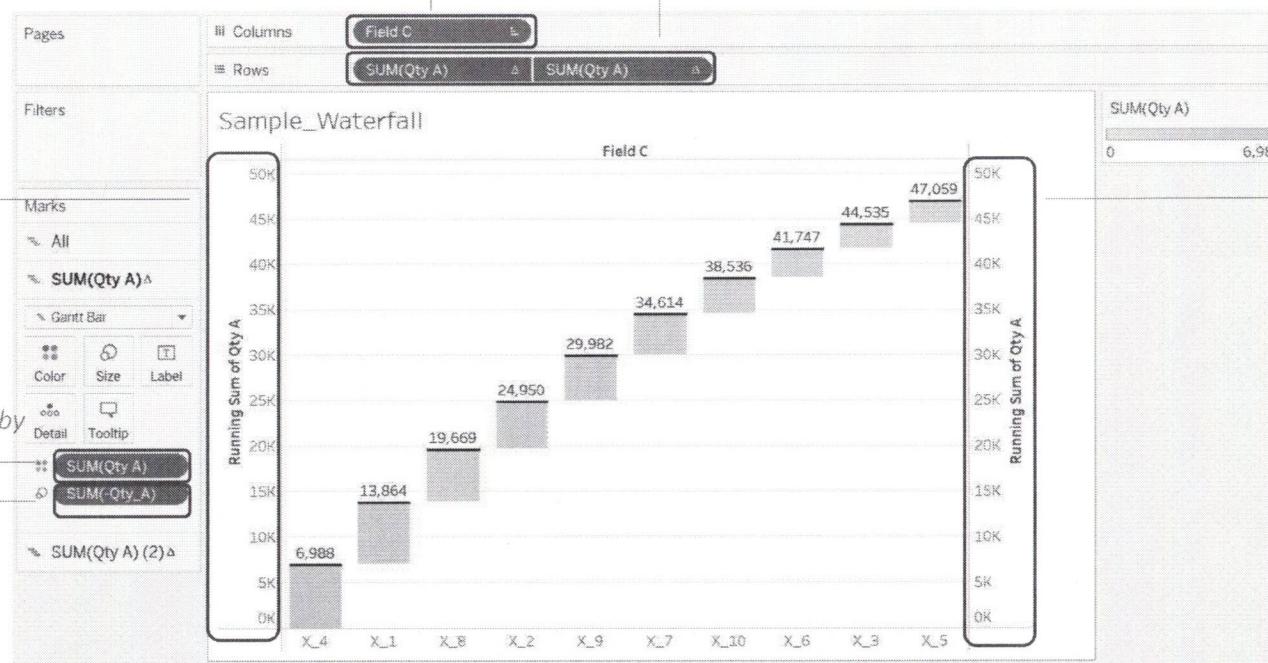
Right click on your column, then sort by field.

Add the qty you wish to use twice, then right click on each, select 'Quick Table Calculation', then select 'Running Total'

Right click on this axis and select 'Synchronize Axis'

Color scheme defined by your value

Sized defined by the negative of your value



Right click on this axis and select 'Dual Axis'

# Basic Functionality – Publishing

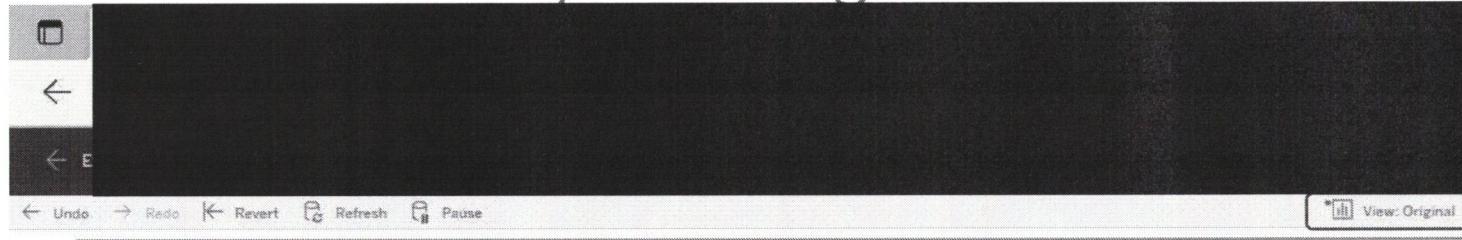
*Open the Server Menu, and select*

*Publish Workbook*

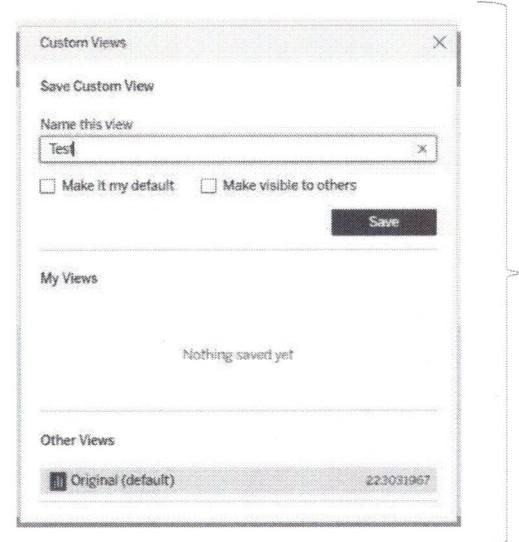
The screenshot shows the Tableau software interface with the following elements:

- Top Bar:** Shows the title "Tableau - Sample\_Workbook" and a menu bar with options: File, Data, Worksheet, Dashboard, Story, Analysis, Map, Format, **Server**, Window, Help.
- Dialog Box:** A modal window titled "Publish Workbook to Tableau Server".
  - Project:** A dropdown menu showing a selected project.
  - Name:** A dropdown menu showing "Sample\_Workbook".
  - Description:** A text input field with placeholder text.
  - Tags:** A "Add" button.
  - Sheets:** A dropdown menu showing "All Edit".
  - Permissions:** A dropdown menu showing "Same as project".
  - Data Sources:** Shows "1 embedded in workbook Edit".
  - More Options:** Includes checkboxes for "Show sheets as tabs", "Show selections", and "Include external files" (which is checked).
- Right Side Labels:**
  - "Location where you'll publish.." next to the Project dropdown.
  - "Give a unique name to your workbook" next to the Name dropdown.
  - "Select which worksheets and dashboards you want to publish. The default is all" next to the Sheets dropdown.
  - "When ready, click publish, and a web version of your views will open" next to the Publish button.

# Basic Functionality – Saving Custom Views Online

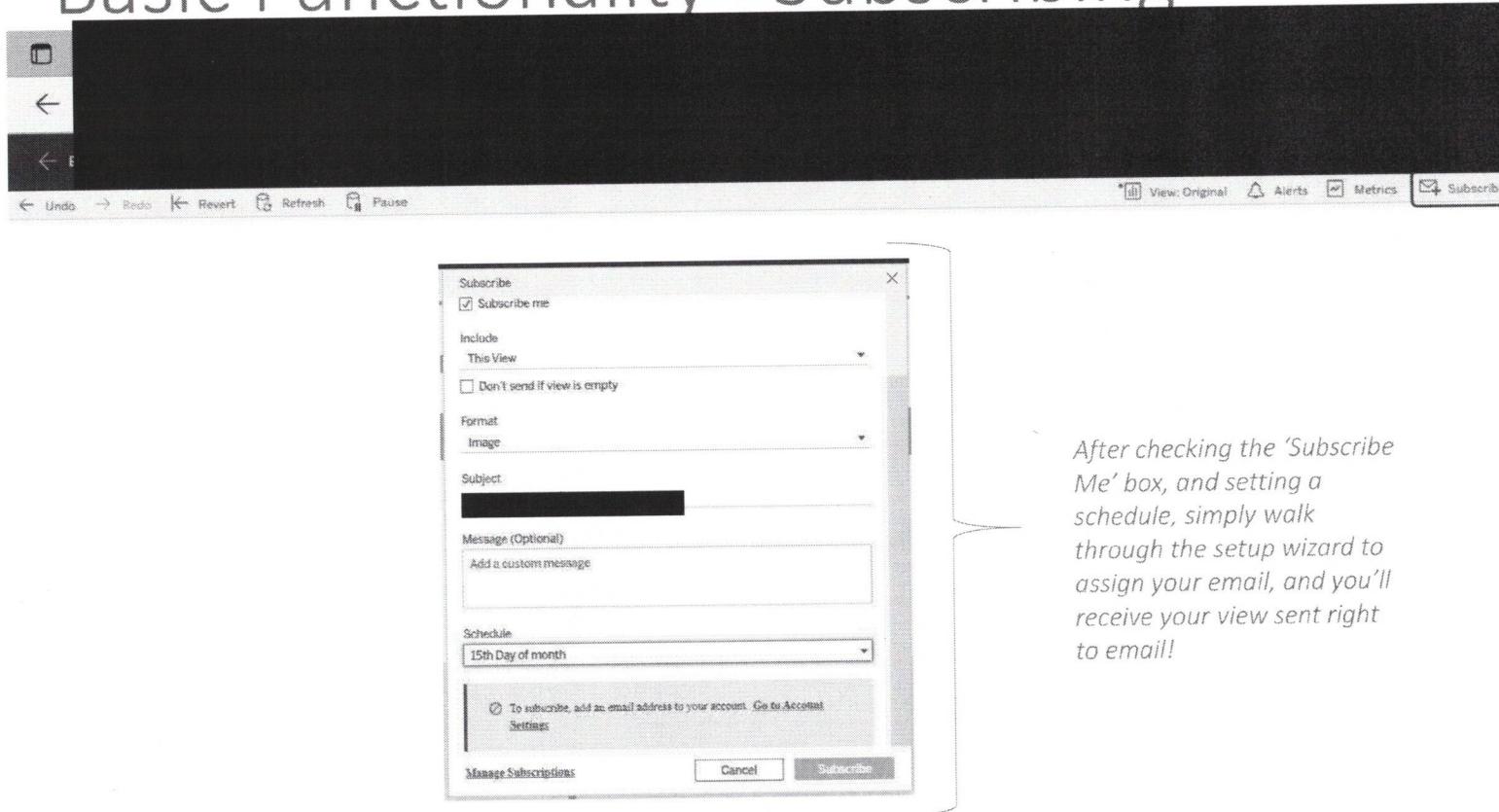


On a web view, click this button to name and save a specific view meaningful to you.



Type a name for you and click to save so every time you open the dashboard, it goes right to what you need.

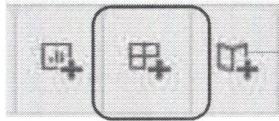
# Basic Functionality –Subscribing



*On a web view, click this button to get a view emailed to you directly*

*After checking the 'Subscribe Me' box, and setting a schedule, simply walk through the setup wizard to assign your email, and you'll receive your view sent right to email!*

# Basic Functionality – Dashboards



In lower right-hand corner,  
select this sign to create a  
new dashboard.

Drag and drop views  
and graphs directly to  
create your dashboard.

Dashboard Layout

Default Phone Device Preview

Size Desktop Browser (1000 x 800)

**Sheets**

- Sample\_Table
- Sample\_Graph
- Sample\_Waterfall

**Objects**

- Horizontal
- Vertical
- A Text
- Image
- Web Page
- Blank
- Navigation
- Download
- Extension
- Ask Data

Tiled Floating

Show dashboard title

Sample\_Table

Field C	Field A			Qty B		
	W_A	W_B	W_C	W_A	W_B	W_C
X_1	1,379	1,598	3,958	72	68	286
X_2	3,251	1,716	314	197	132	226
X_3	1,367	1,000	421	221	141	64
X_4	1,734	2,151	3,103	234	147	260
X_5	1,443	200	881	223	30	80
X_6	703	1,646	862	75	72	56
X_7	2,048	1,964	620	200	235	119
X_8	2,551	2,315	939	391	175	35
X_9	1,677	2,516	839	102	127	256
X_10	739	2,195	988	173	218	31

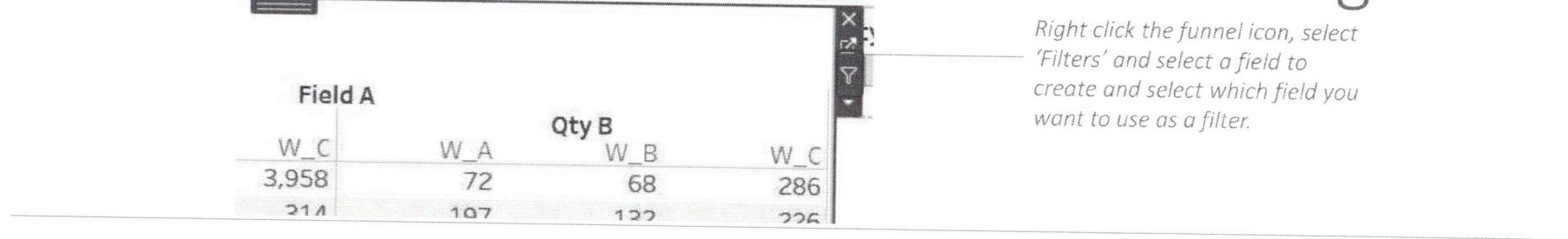
Sample\_Waterfall

The waterfall chart displays the cumulative sum of values for 'Qty A' across ten fields, labeled X\_4 through X\_5. The total value is 47,059. The chart shows the following data points:

Field	Value
X_4	6,988
X_5	13,864
X_6	19,669
X_7	24,950
X_8	29,982
X_9	34,614
X_10	38,536
X_1	41,747
X_2	44,535
X_3	47,059

Right click on any object  
to format

# Basic Functionality – Dashboards - Filtering



A screenshot of a dashboard interface. At the top, there's a header with the text 'Field A' and 'Qty B'. Below this is a table with four columns labeled W\_C, W\_A, W\_B, and W\_C. The table contains the following data:

Field A	Qty B		
W_C	W_A	W_B	W_C
3,958	72	68	286
214	107	122	226

To the right of the table is a vertical toolbar with icons for X, copy, paste, and filters. A callout line points from the 'Filters' icon to the explanatory text on the right.

*Right click the funnel icon, select 'Filters' and select a field to create and select which field you want to use as a filter.*



A screenshot of a filter dialog box. It lists four options under 'Field A': '(All)', 'W\_A', 'W\_B', and 'W\_C'. The 'W\_A' checkbox is selected, indicated by a grey background. A callout line points from the 'W\_A' option to the explanatory text on the right.

*Right click anywhere in the filter and select 'Apply to Worksheets' to select which worksheets you want to apply the filter to.*