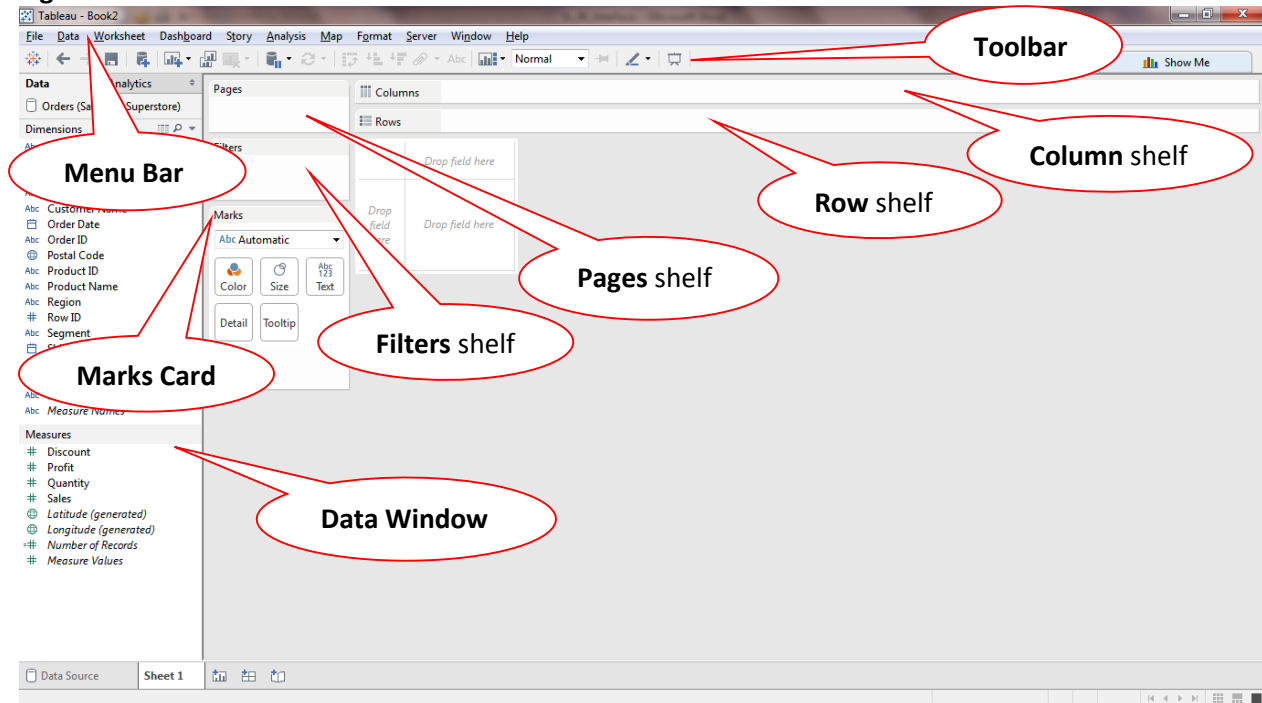


Objective: This exercise will provide an overview of the Tableau interface

After connecting to a data source, you will see a blank sheet as displayed on Figure 1, where data visualizations can be developed. Through the Tableau interface shown on Figure 1, many powerful and useful features can be accessed.

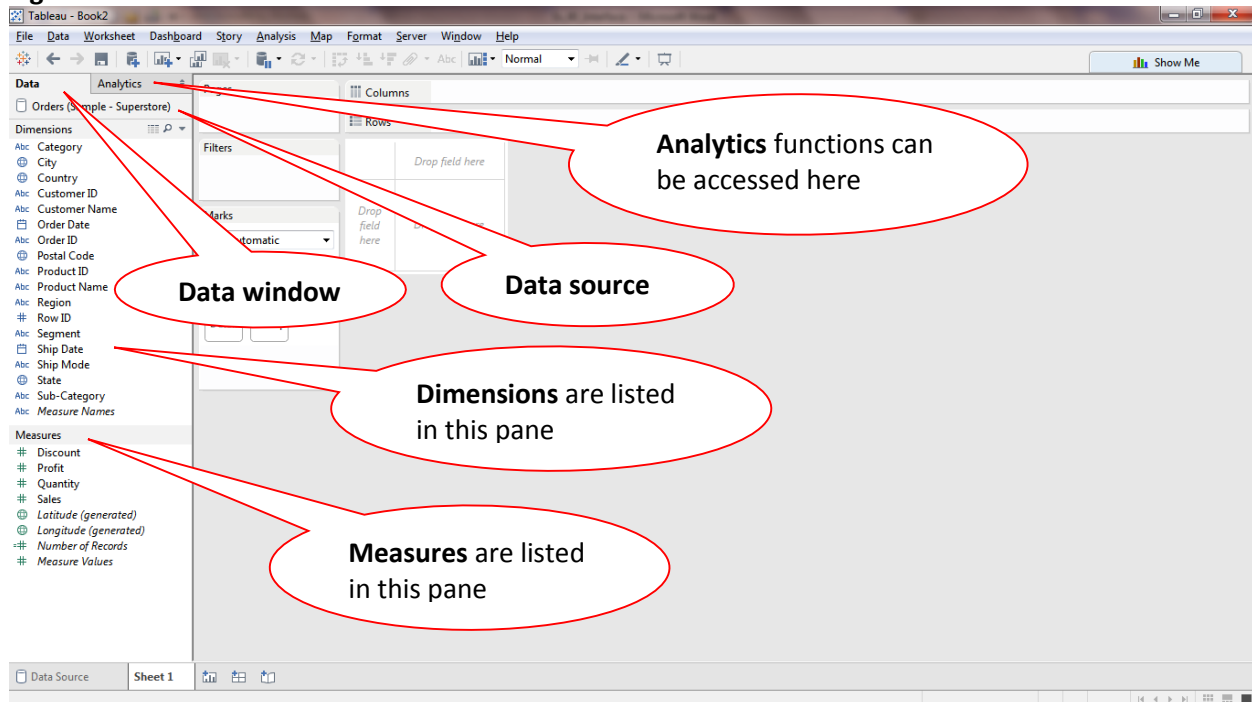
Figure 1



The **Menu Bar** at the top of the window provides access to many powerful features. Below it is the **Toolbar**, which contains many buttons such as **Save**, **Undo**, **Redo**, **Add New Data Source**, and **Duplicate Sheet**. These buttons are contextual and, therefore, only the relevant ones are highlighted—based on the current state of the worksheet.

The **Marks Card** contains additional shelves on which fields can be placed directly (through drag and drop). **Shelves** include **Color**, **Size**, **Text**, **Detail** and **Tooltip**. Clicking on these shelves activate popup windows which enable their characteristics, such as labels, to be edited. The default **Marks** type is **Automatic**, as shown in Figure 1. However, there are many Mark types which can be used instead of the default (Automatic).

Figure 2



The **Data Window**, highlighted on Figures 1 and 2, has two tabs: **Data** and **Analytics**. The default tab is **Data** which displays the Dimensions and Measures used to develop visualizations. The **Analytics** tab displays a completely different set of options, which are focused on analysis.

At the top of the data window pane, the open data connection is shown. On Figure 2, the data connection displayed is **Orders (Sample – Superstore)**.

Views are built by dragging and dropping fields from the **Data Window** onto the canvas or directly onto the shelves. The shelves, which are also sometimes referred to as Cards, are:

- Columns Shelf
- Rows Shelf
- Filter Shelf
- Pages Shelf
- Marks Card

The layout that is displayed when a **Dashboard tab** is selected is somewhat different compared to the **Worksheet tab** layout. When a Dashboard window is active:

- Data Window (used in Worksheets) is replaced by the Dashboard Window
- It lists all the sheets available (in the left-hand window)
- It lists the Dashboard objects
- Display the controls for the objects
- Displays the sizing options

Figure 3 displays the menu tree when the **File** option is selected on the **Menu Bar** when the Worksheet tab is active.

Figure 3

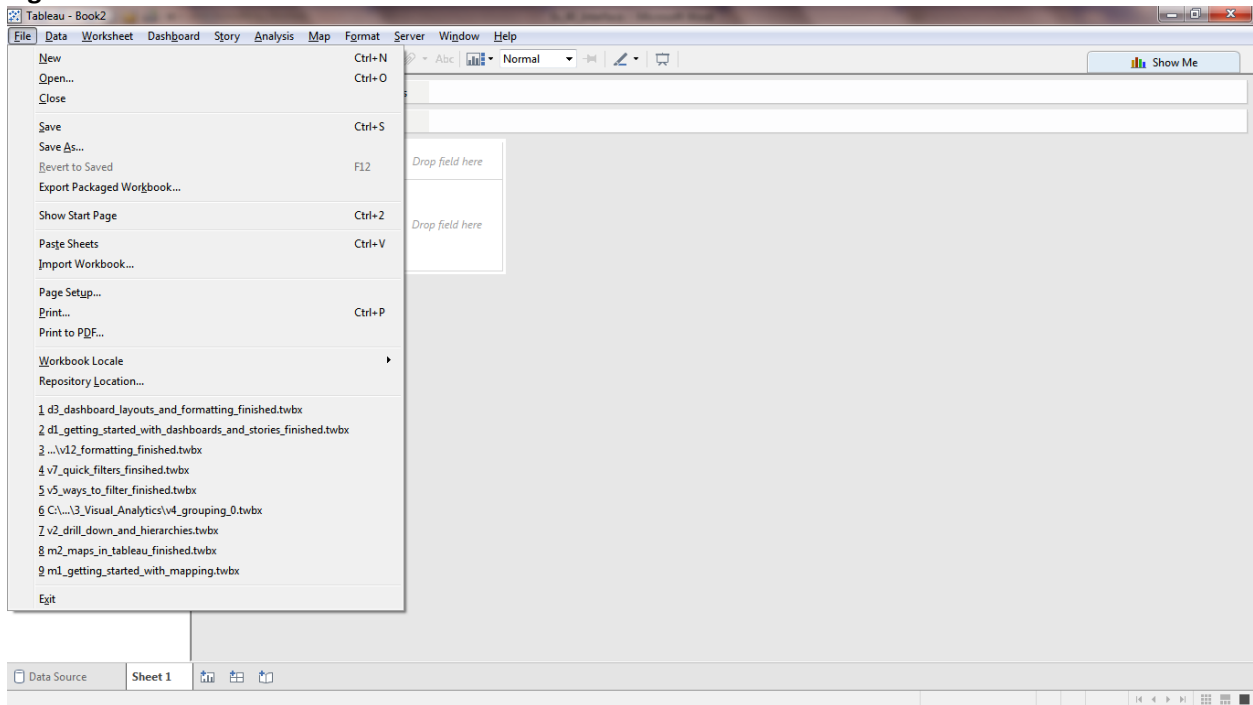


Figure 4 displays the menu tree when the **Data** option is selected on the **Menu Bar**.

Figure 4

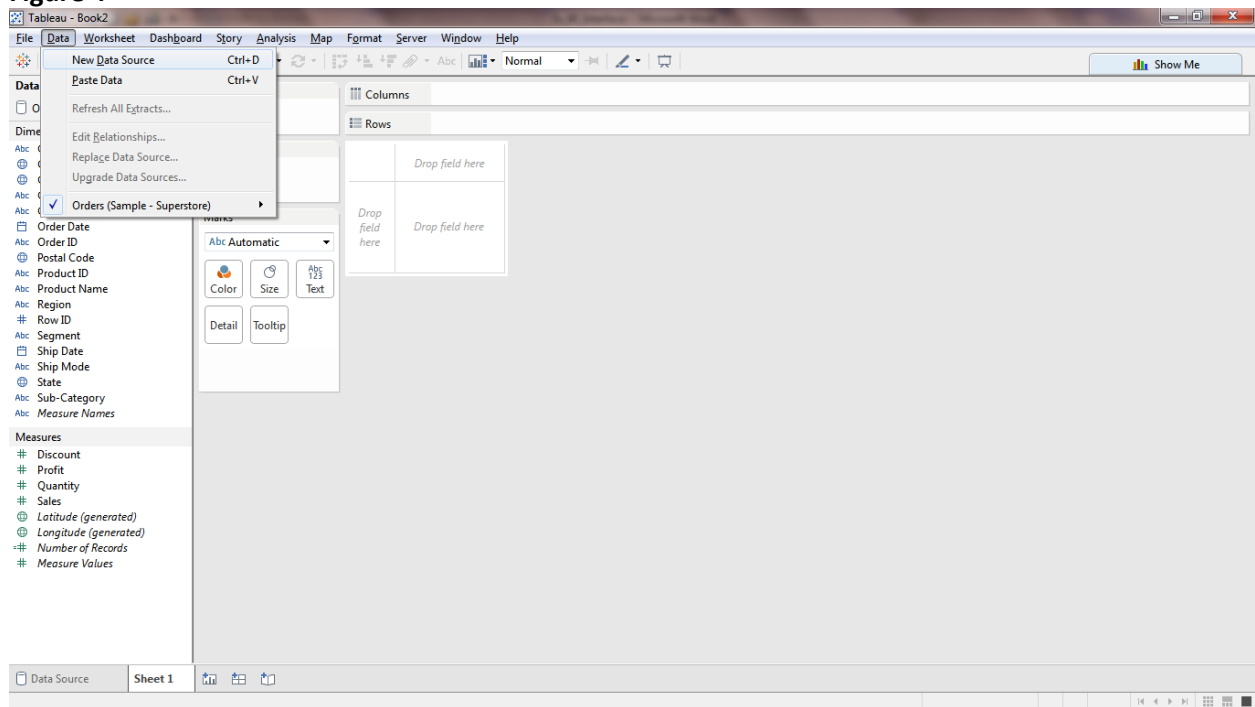


Figure 5 displays the menu tree when the **Worksheet** option is selected on the **Menu Bar**.

Figure 5

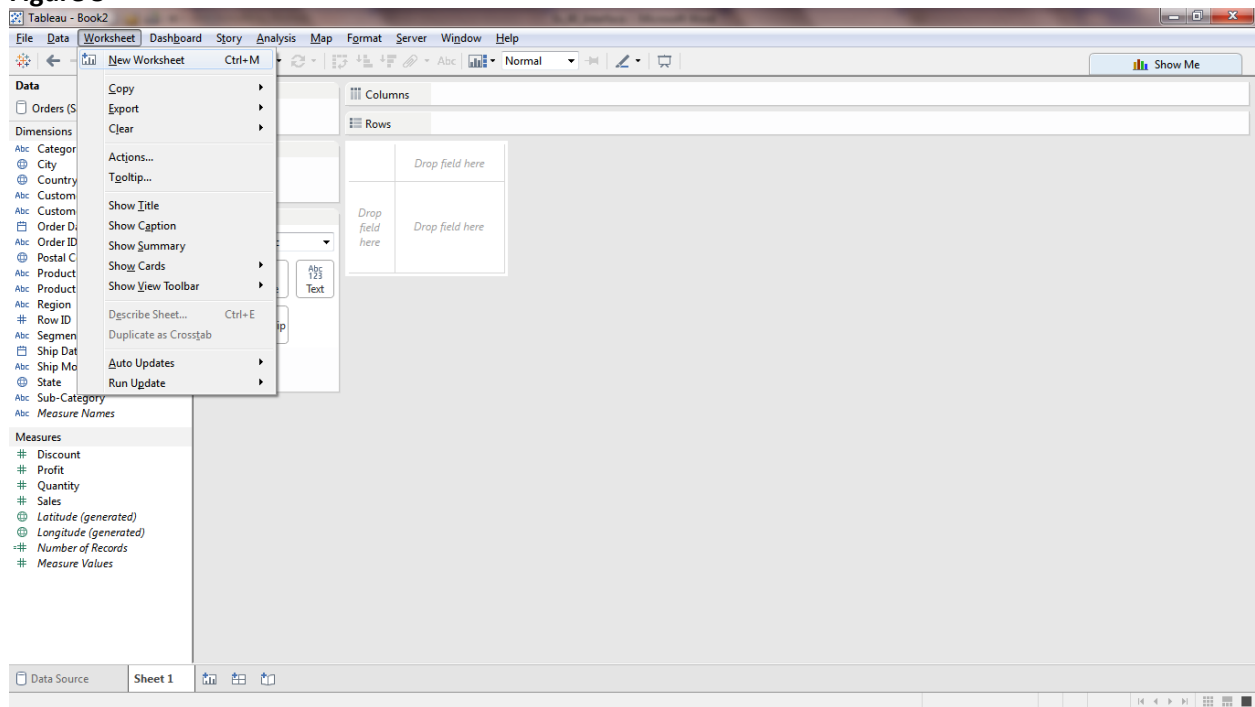


Figure 6 displays the menu tree when the **Dashboard** option is selected on the **Menu Bar**.

Figure 6

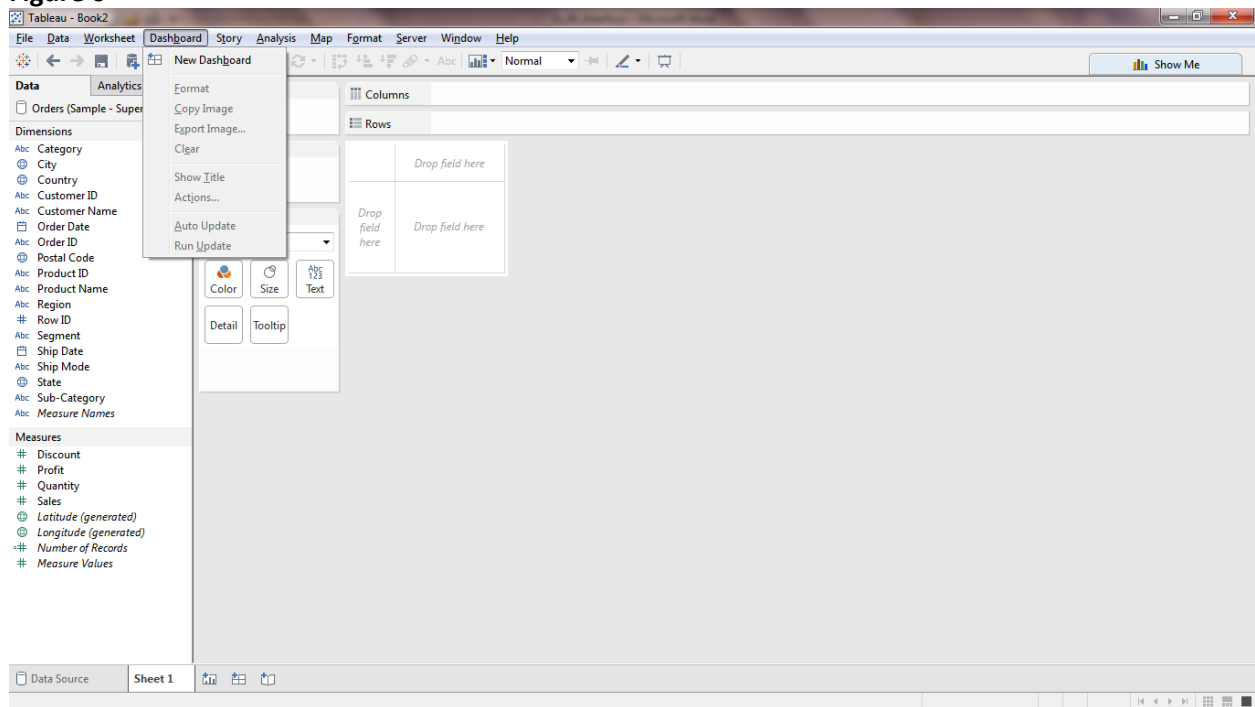


Figure 7 displays the menu tree when the **Analysis** option is selected on the **Menu Bar**.

Figure 7

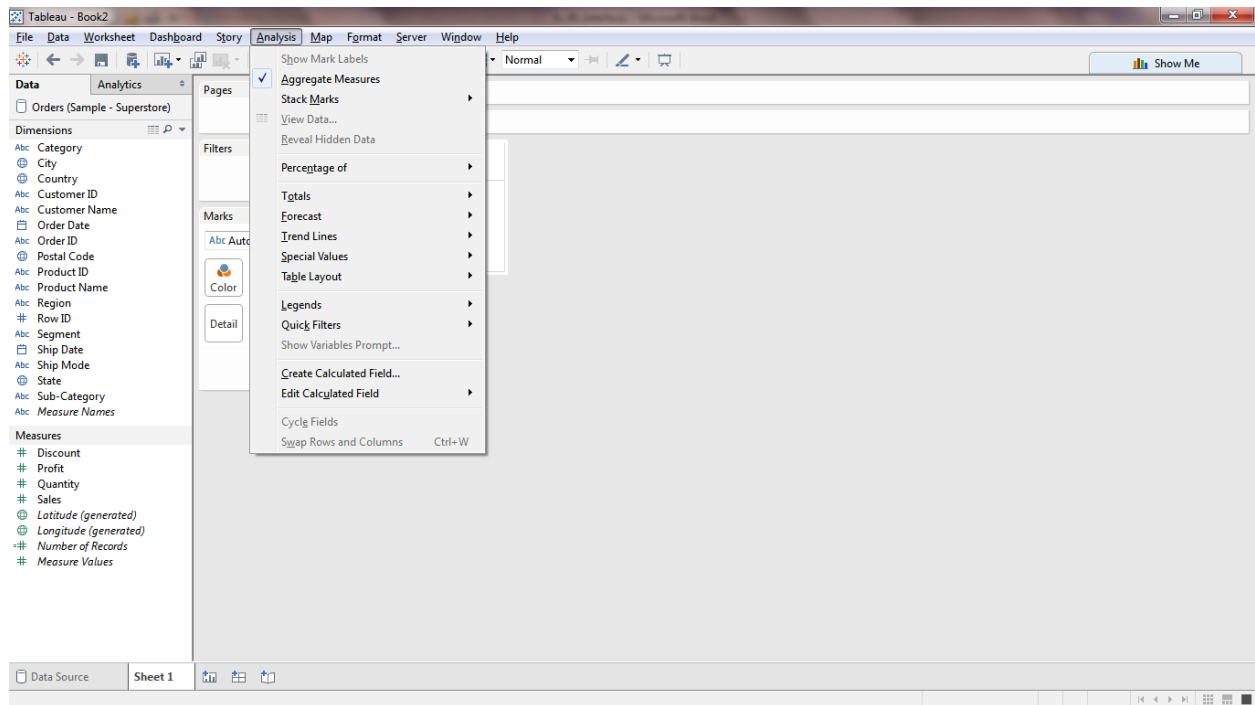
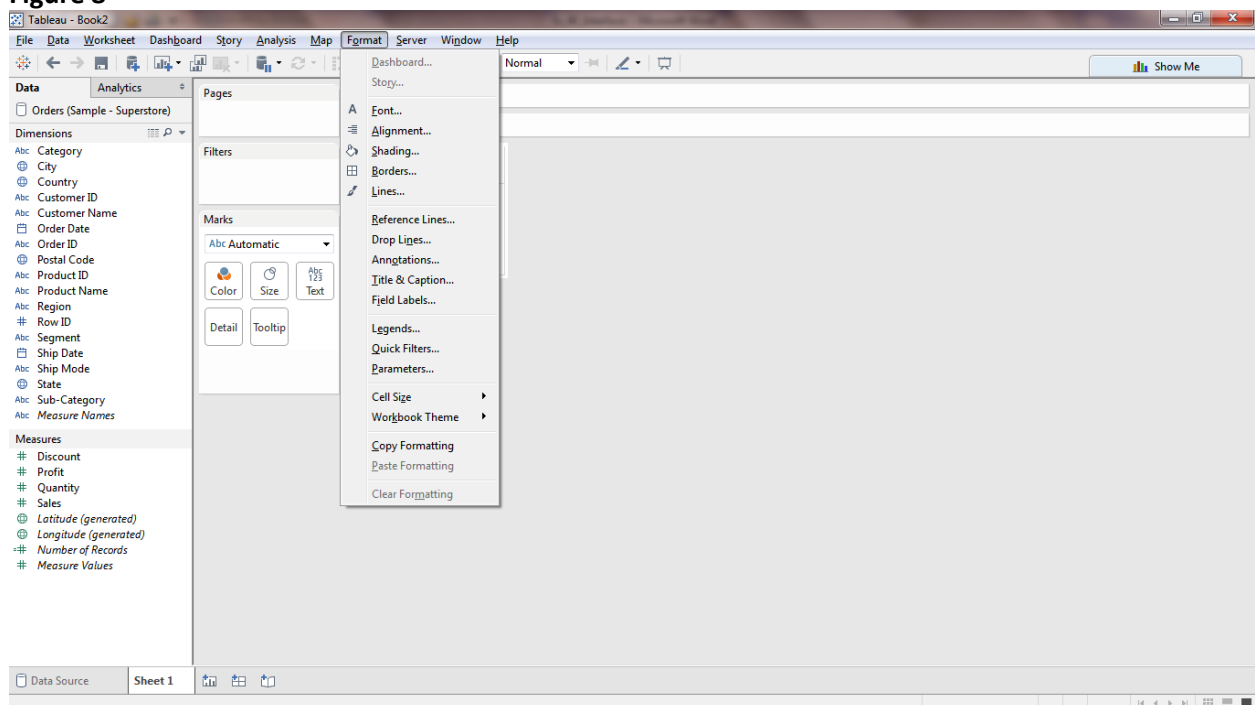


Figure 8 displays the menu tree when the **Format** option is selected on the **Menu Bar**.

Figure 8

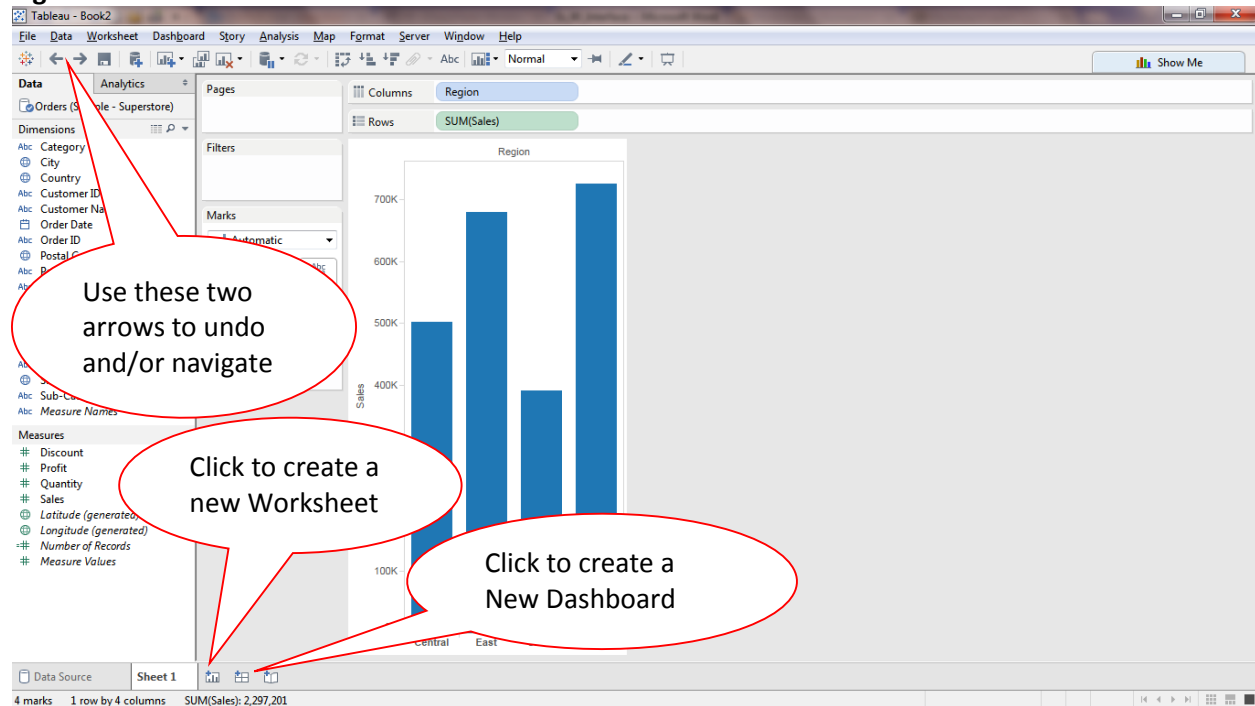


It should be noted that:

- Tableau does not save a worksheet automatically; hence, you must save your work before exiting
- Buttons are contextual; hence, the functions available depend on what is going on in the sheet

To undo or reverse an action, use the **Back** arrow. The **Back** and **Forward** arrows, highlighted on Figure 9, can be used to navigate and go back/forward as visualizations are developed and/or modified.

Figure 9



The **Sheet** tabs at the bottom of the window, highlighted on Figure 9, are used to create new worksheets, dashboards and stories. Sheets can be moved around (by dragging), renamed, and duplicated. By right-clicking on the appropriate sheet, a menu tree will popup which can enable:

- Copying a sheet
- Renaming a sheet
- Deleting a sheet
- Exporting a sheet
- Creating a new worksheet, dashboard or story

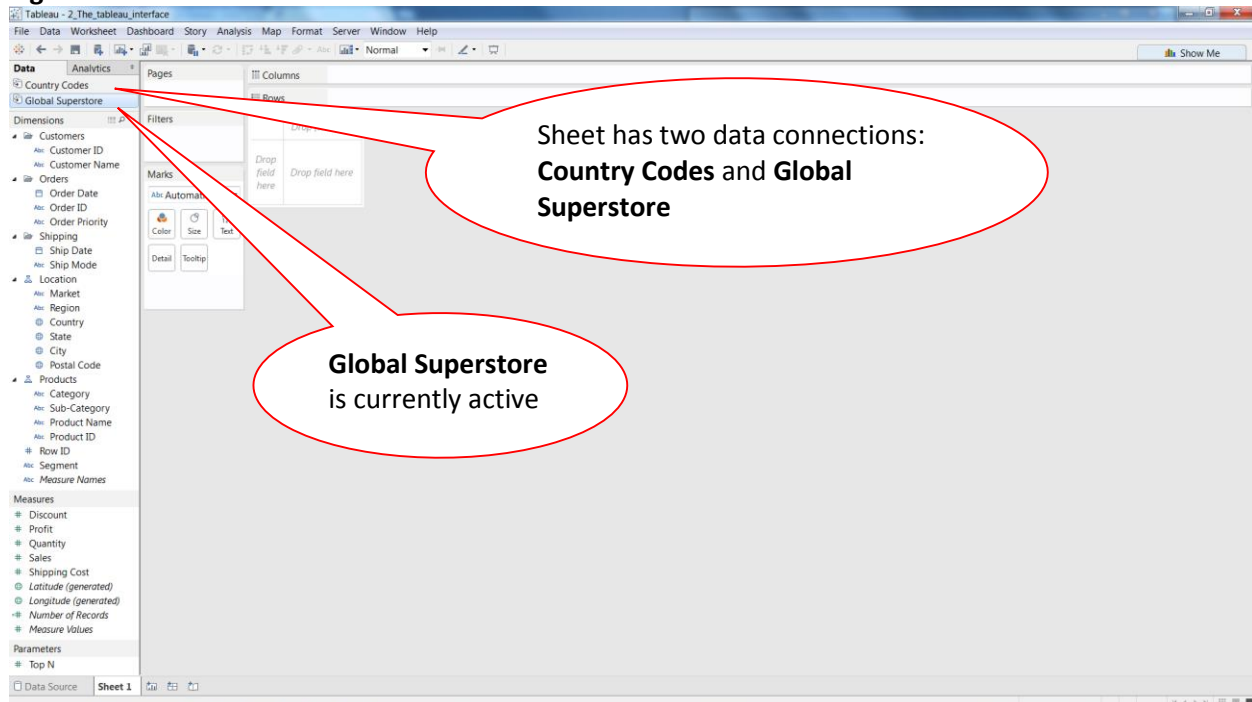
To create a new sheet or a new dashboard:

- Click the **New Worksheet** icon as shown on Figure 9
- Click the **New Dashboard** icon as shown on Figure 9

If two data sources are used in a sheet, they will be displayed in the **Data Window** as shown on Figure 10, where the data sources are:

- Country Codes
- Global Superstore

Figure 10



The view that is displayed in the **Data Window** on the left hand side, i.e., the list of dimensions and measures, depends on the data source that is selected. For example, if the **Global Superstore** is selected, then its dimensions and measures will be displayed in the Data Window. In Figure 10, the dimensions and measures displayed belong to the **Global Superstore** data source.

If **Country Codes** is clicked, it will change the view as shown in Figure 11, where the list of dimensions and measures reflects the data contained in the **Country Codes** data source.

Figure 11

