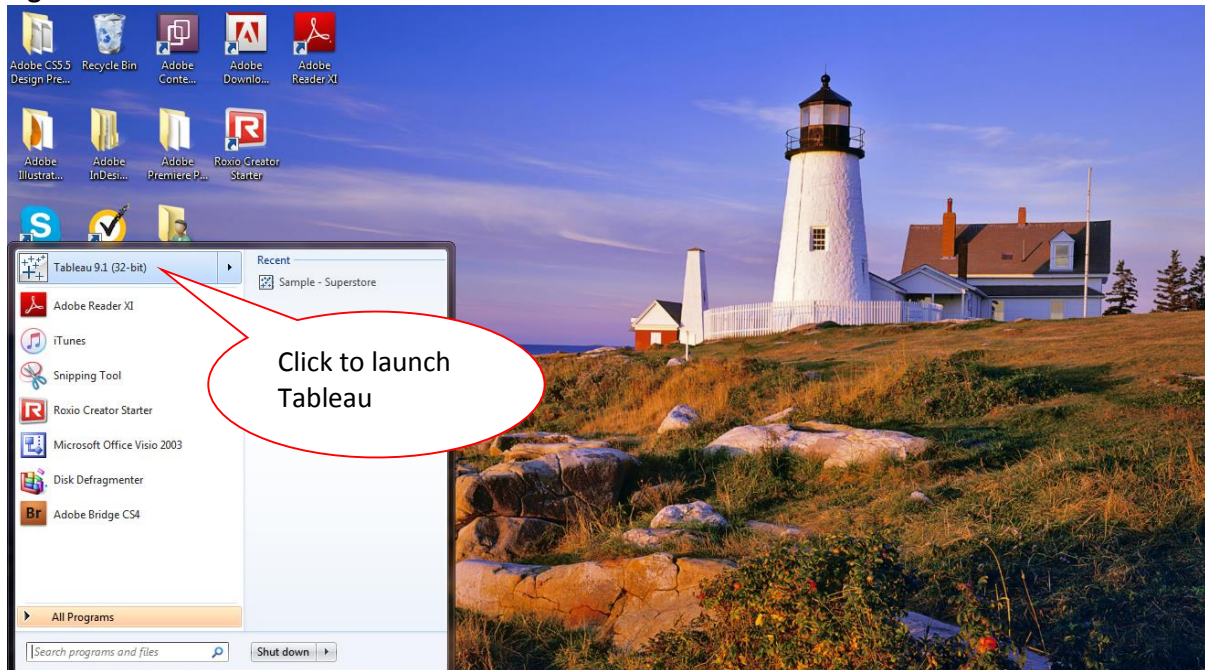


Objective: This exercise will demonstrate how to launch Tableau and connect to an Excel spreadsheet data source

- Launch the **Windows Start Menu** displayed on Figure 1

Figure 1



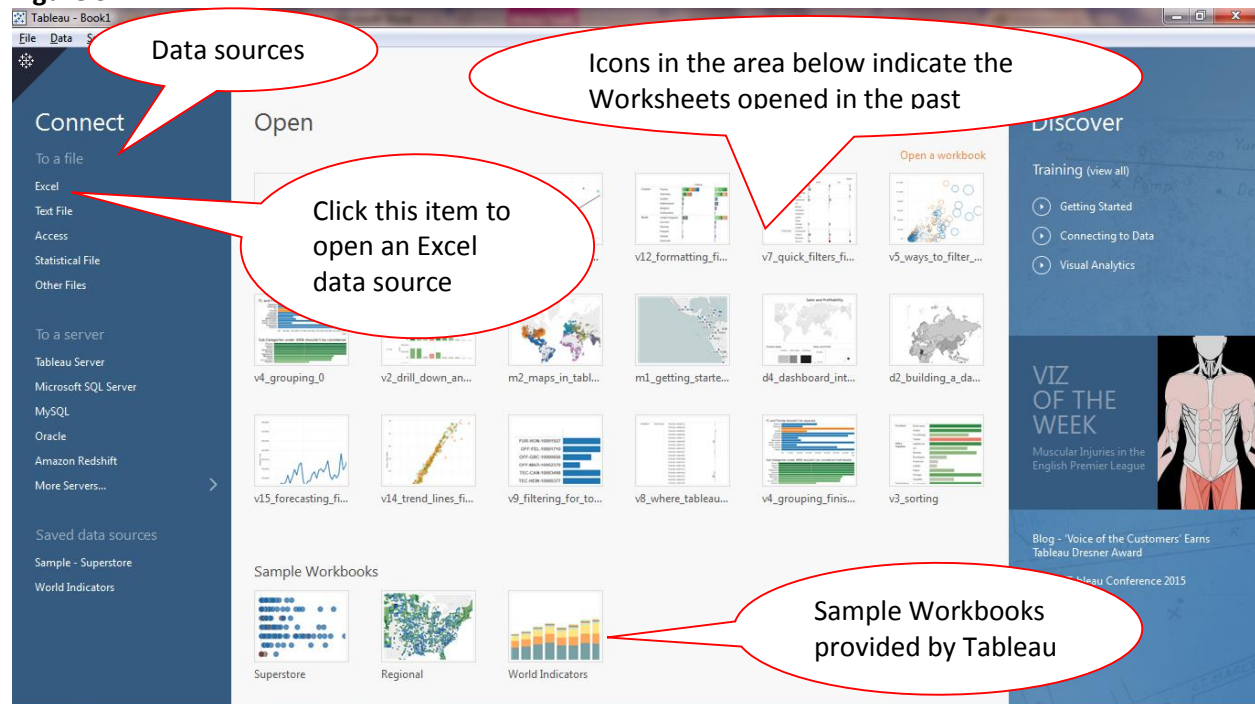
- Click on **Tableau 9.1 (32-bit)**, which will lead to the intermediate screen displayed on Figure 2

Figure 2



The intermediate screen, which flashes and then disappears, is followed by the **Welcome** screen displayed on Figure 3.

Figure 3



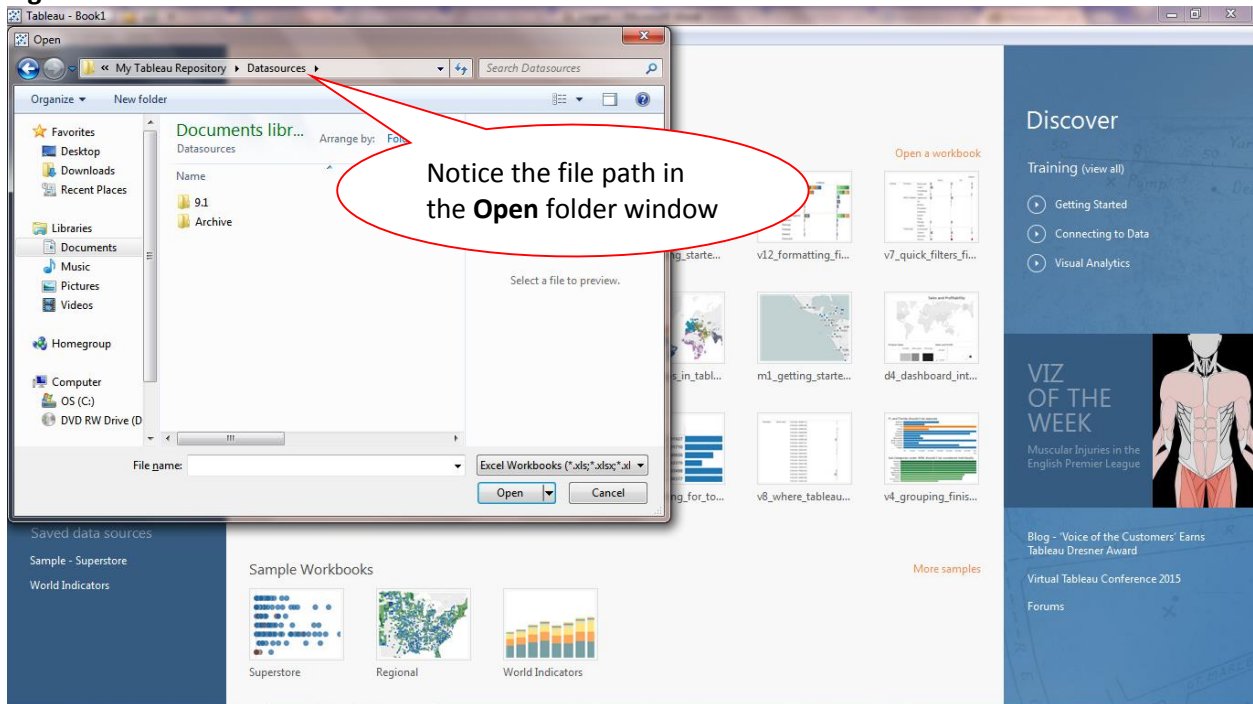
The left hand pane with the blue background, **Connect**, lists the various data sources that you can connect to. These sources include relational databases, online data sources, text files, as well as Excel. An Excel sheet is considered just like a database table. It is possible to join one or multiple tables (or sheets) in Tableau.

The middle section of the window with the light background, under **Open**, lists the workbooks that were used recently. A workbook in this area can be launched by just clicking on it. The three items listed under **Sample Workbooks** are provided by Tableau and show up by default.

In our exercise, we will connect to an Excel spreadsheet. To connect:

- Click on **Excel** as shown on Figure 3, which will popup the window displayed on Figure 4

Figure 4



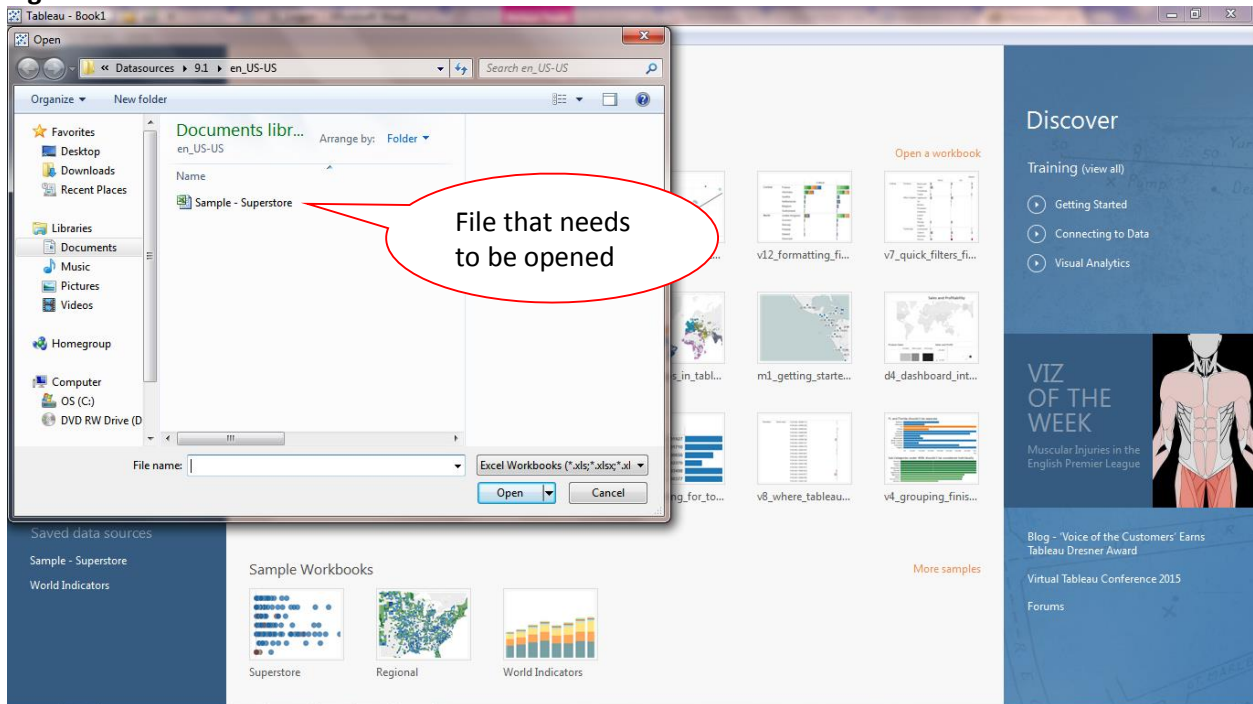
The file that we want to connect to is at a lower level. Therefore, we will need to drilldown into the folder structure until the desired file is displayed.

Navigate to the desired spreadsheet as follow:

- My Tableau Repository > Datasources > 9.1 > en_US-US

When the drilldown has been completed, the display will be as shown on Figure 5:

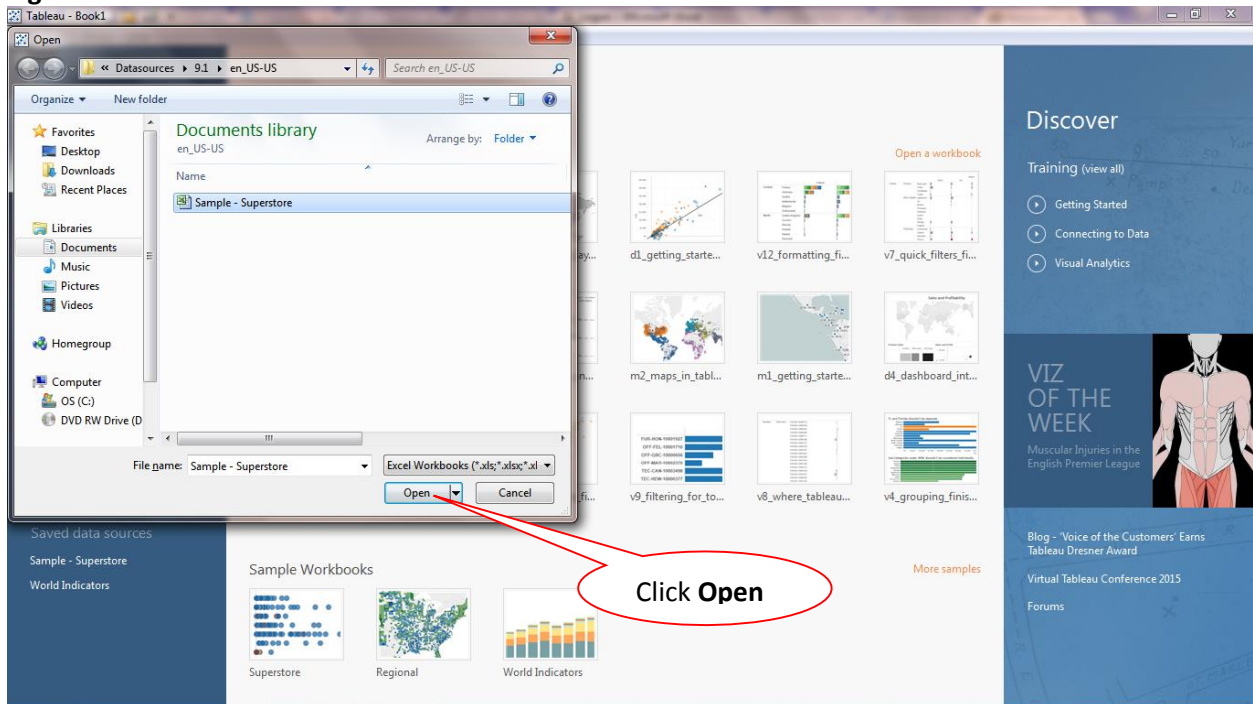
Figure 5



The **Sample – Superstore** file is now displayed in Figure 5.

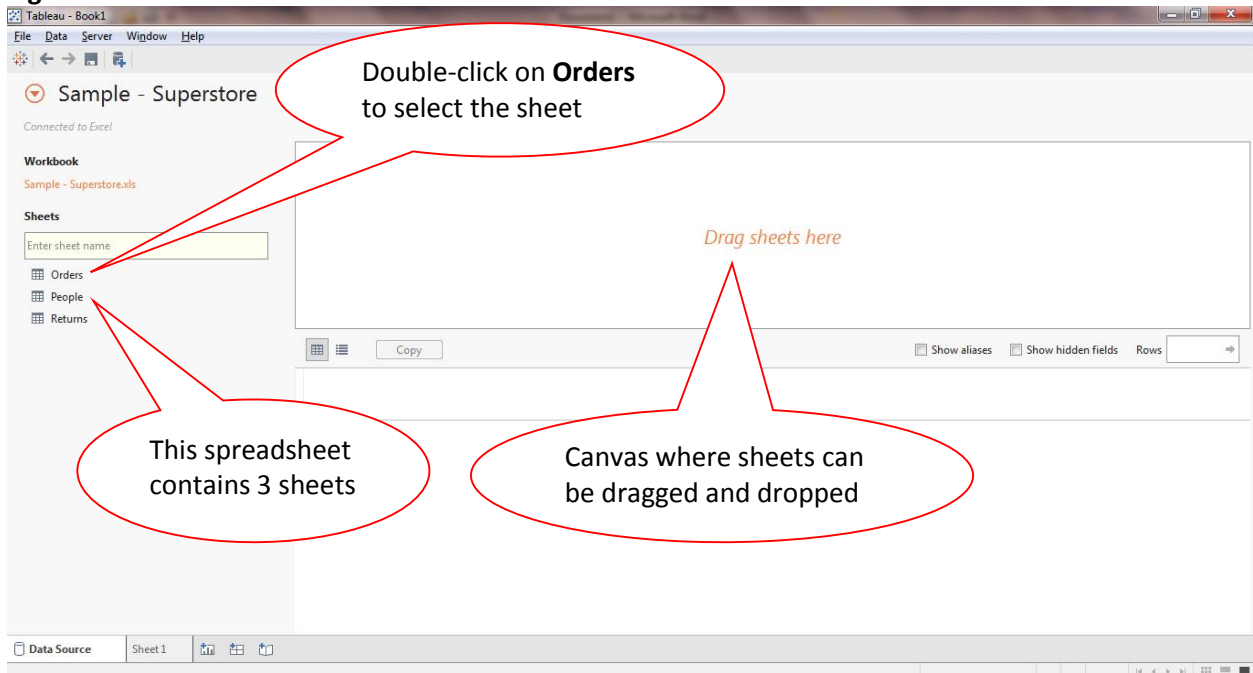
- Click on the file **Sample – Superstore**, which will highlight it as shown on Figure 6

Figure 6



- Click **Open** button as shown on Figure 6, which will open the **Sample – Superstore** spreadsheet and lead to the display on Figure 7

Figure 7



This spreadsheet has three sheets: **Orders**, **People** and **Returns**. We can connect to one or more of the sheets or tables, such as **Orders**.

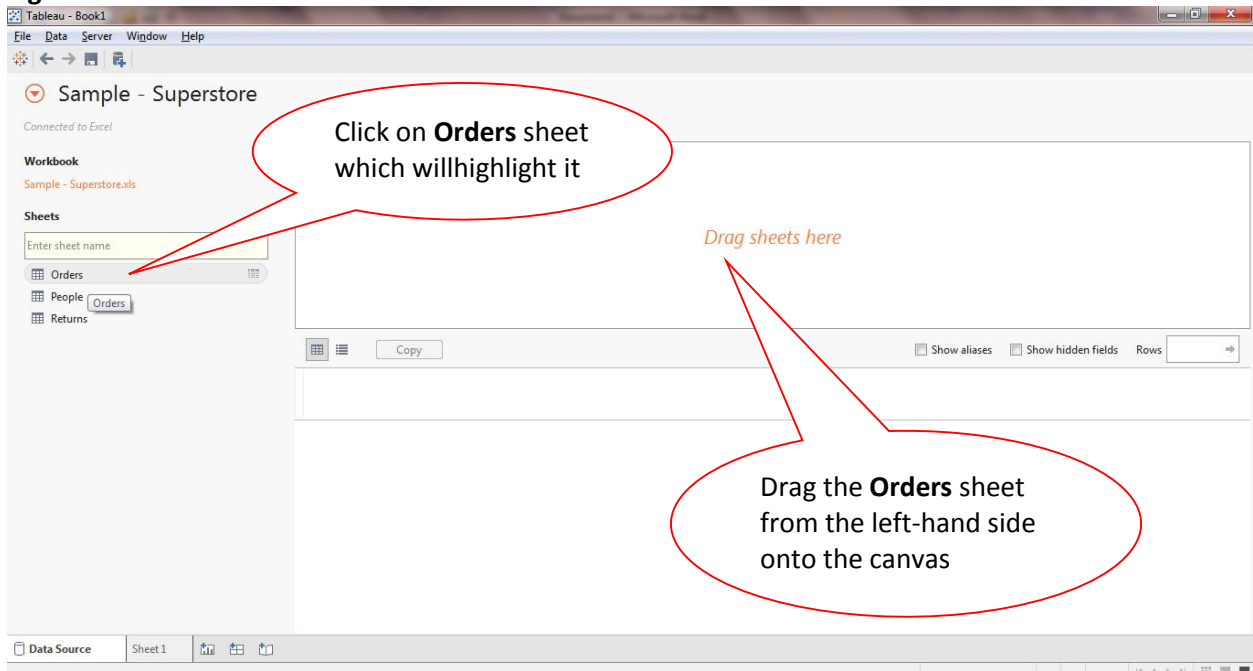
The **Orders** sheet can be opened for analysis using two methods:

1. Double-clicking on the **Orders** sheet
2. Dragging and dropping **Orders** onto the canvas

To drag and drop:

- Click the **Orders** sheet as shown on Figure 8

Figure 8



- Drag **Orders** onto the blank canvas area as shown on Figure 8, which will lead to the display on Figure 9

Figure 9

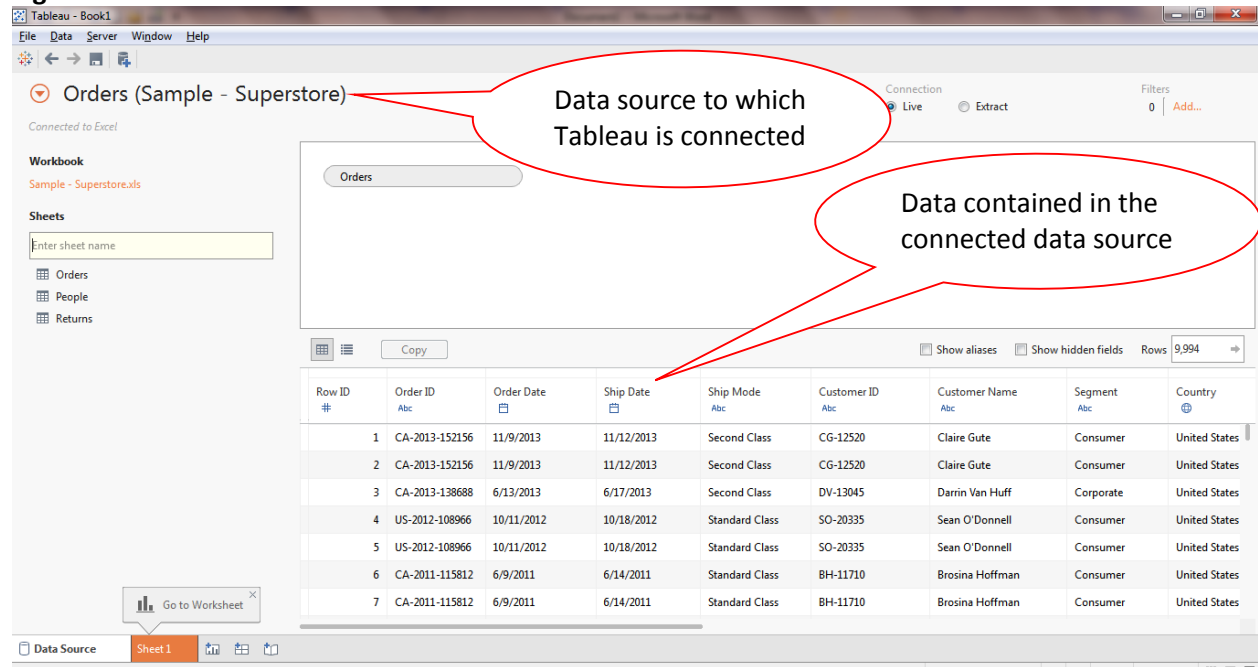


Figure 9 shows that the **Orders** sheet of the **Sample – Superstore** data source (Excel spreadsheet) is connected to Tableau. The lower section of the display shows the data contained in the selected sheet (**Orders**). The first row contains the column headers. The table itself contains sales data for customers buying specific products.

The exercises in this book are primarily based on the **Sample – Superstore** spreadsheet, which is a subset of the **Global Superstore** spreadsheet which has also been used in some exercises. However, the **Global Superstore** has been used in most of the Tableau sample workbooks.