

# Tableau Workshop Day 1- Morning Session

## Trainer Copy

Dataset: Changes in the British Industry

Topics to Cover
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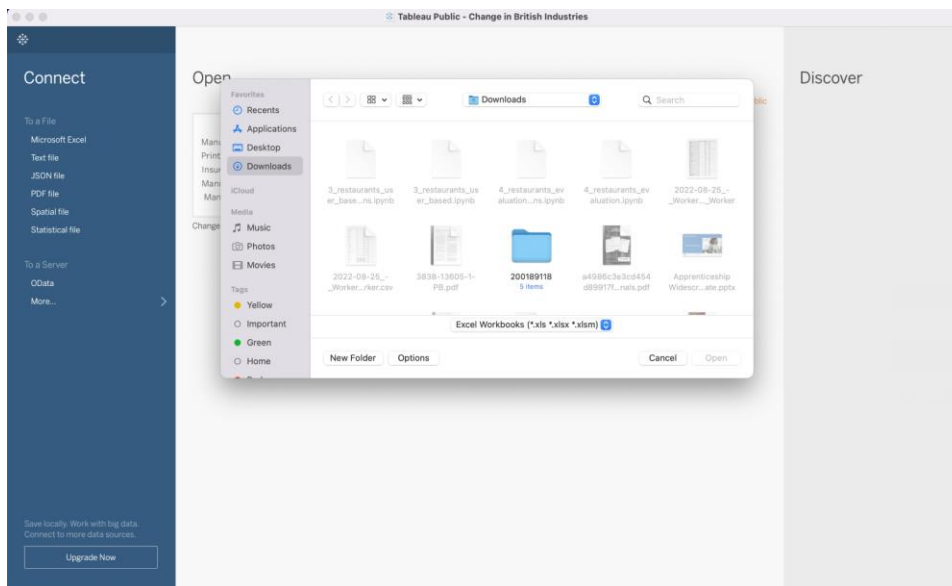
- Introduction to Data Visualisation with Tableau
- What is Tableau?
- Excel vs Tableau
- Data Types
- Kahoot quiz on data types
- About the dataset
- Workflow

Demo on Importing Data & Setting Relationships
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**Step 1:** Import the Excel file



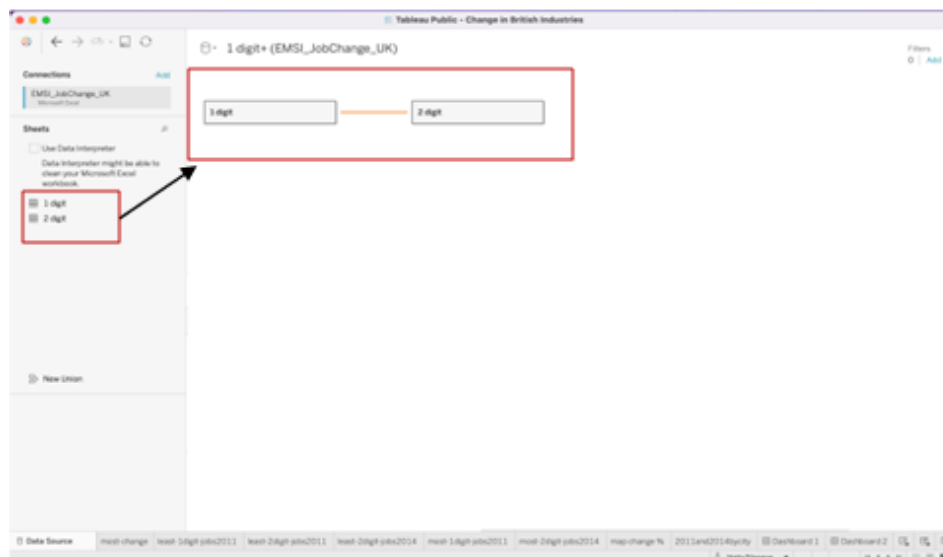
- Click on 'Microsoft Excel' under 'Connect'



- Select the Excel file from the popup window.

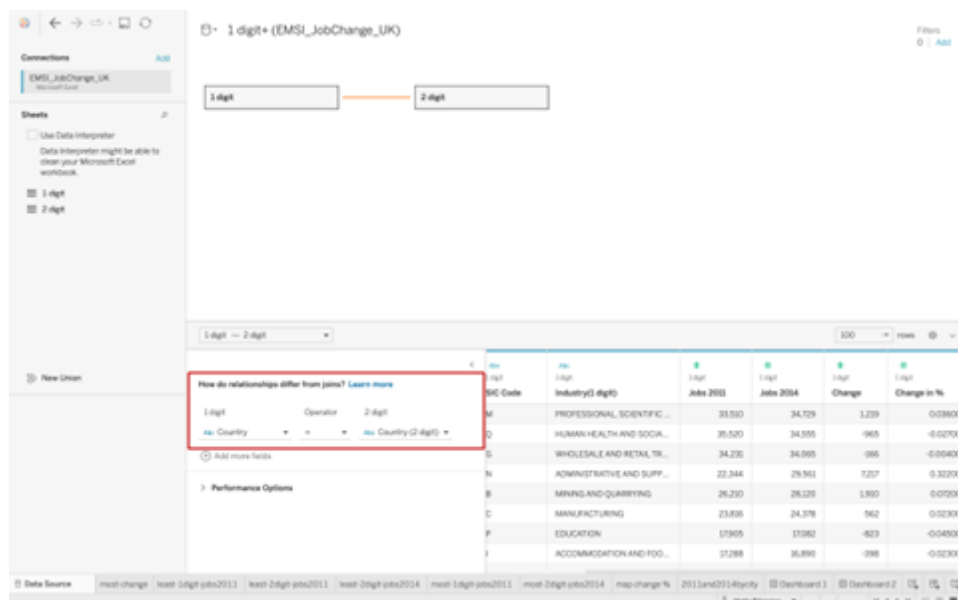
**Step 2:** Drag and drop tables from the left panel labeled 'Sheets' to the center of the screen.

Note: It may take a few seconds to load



### Step 3: Manually set relationships for the tables

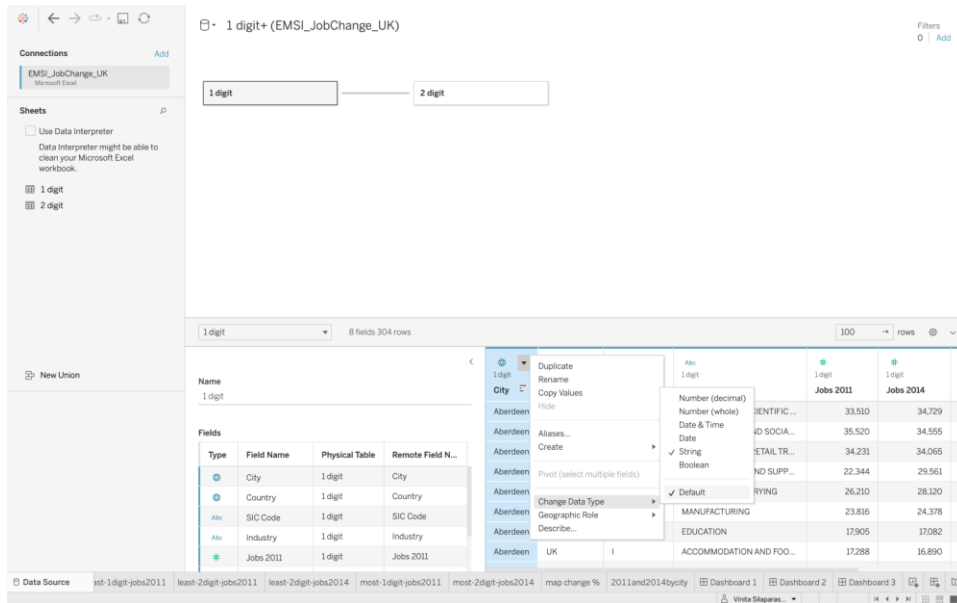
- Click the line that connects the table '1 digit' to the table '2 digit'
- Look for common columns and use the appropriate symbol between them



In this case, 'Country' is the common column, and we use the equal to symbol because we know that both tables contain data about the United Kingdom.

## Step 4: Check data types

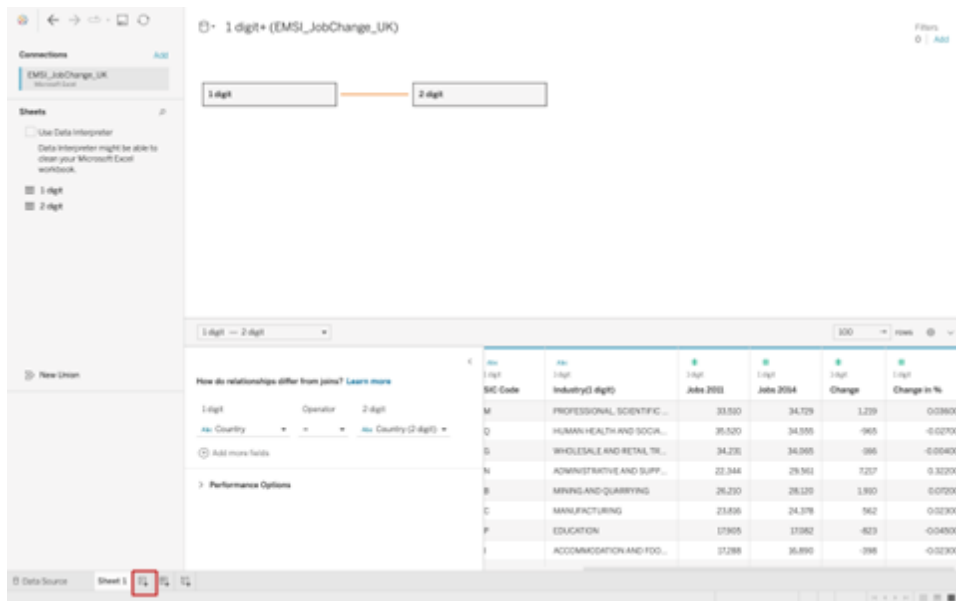
It is important that the data types are correct to get accurate visuals. In our case, Tableau has correctly identified each data type. However, if you do find yourself in a situation where you need to change the data type, here is how to do it.



- Click the downward arrow icon beside the data field that you want to change
- From the drop-down menu, select 'Change Data Type'
- Select the appropriate data type

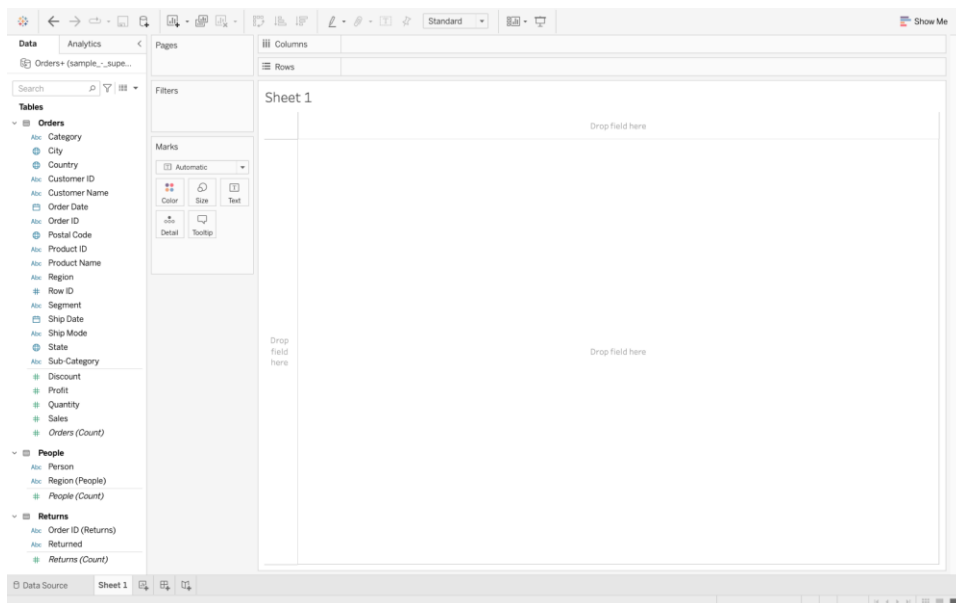
## Step 5: Open a new sheet

At the bottom left corner of the screen, you will see 3 buttons. Click on the 'New Worksheet' button.



## Step 6: Rename columns

Your screen should look like this:



You could simplify long names if needed. Just make sure that the new column names make sense.

