

Getting Started with Tableau Desktop

Welcome to Tableau Desktop 8.2. Follow along with this guide using sample data to learn how to connect to data and build views.

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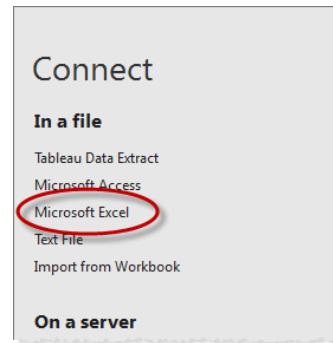
Connect to Data

The first thing to do when you start Tableau is to connect to your data. Follow the steps below to connect to a sample Excel workbook that comes with Tableau.

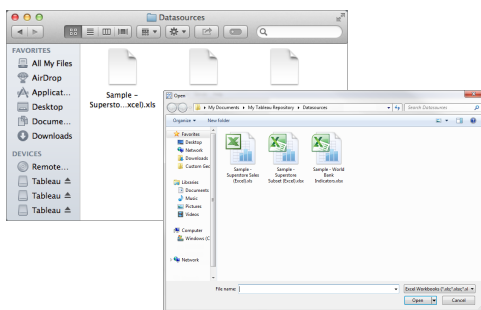
- 1 **Click Connect to data**
On the start page, click **Connect to Data**.



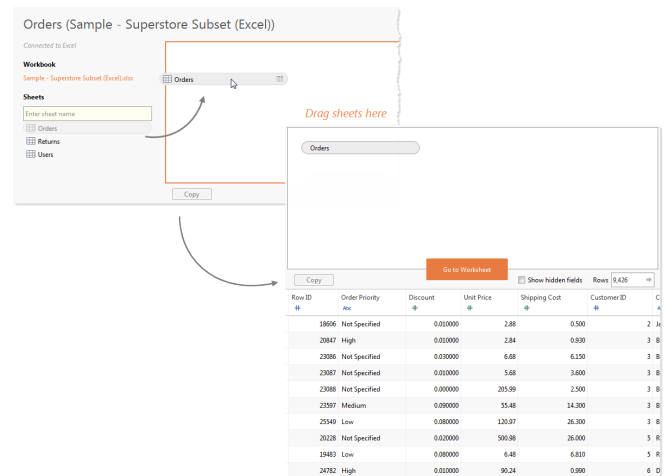
- 2 **Select a data source**
Select the type of data source. For this example, click **Microsoft Excel**.



- 3 **Open the data file**
Go to the Datasources folder in your Tableau Repository and open the **Sample-Superstore Subset** workbook.



- 4 **Set up the connection**
Drag the **Orders** worksheet to the join area, and then click **Go to Worksheet**.

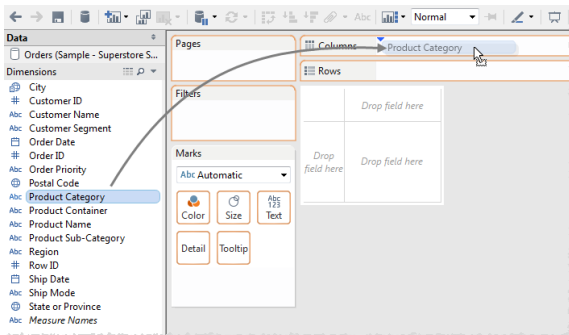


When you are connecting to an Excel workbook of your own, make sure each worksheet is organized into rows and columns properly. To see an example of how to set up your Excel data, open the sample file that comes with Tableau. You can find it in your documents folder: **My Tableau Repository\Datasources\Sample - Superstore Subset.xls**.

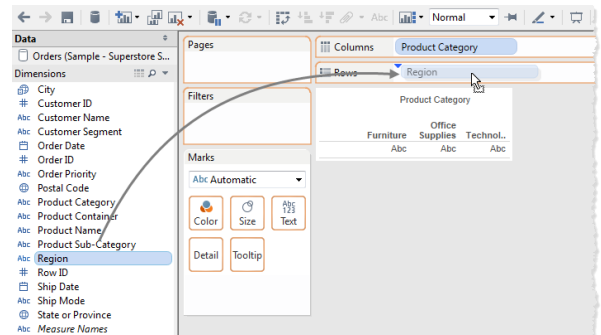
Create a View

After you connect to data, fields are displayed on the left side of the workbook as Dimensions and Measures. Create views by dragging and dropping fields onto shelves.

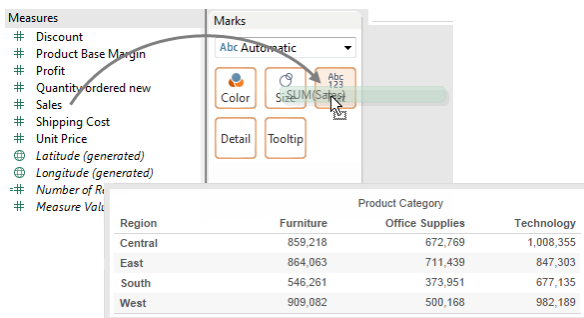
- 1 **Drag a dimension to the Columns shelf**
Click and drag the **Product Category** field and drop it on the **Columns** shelf.



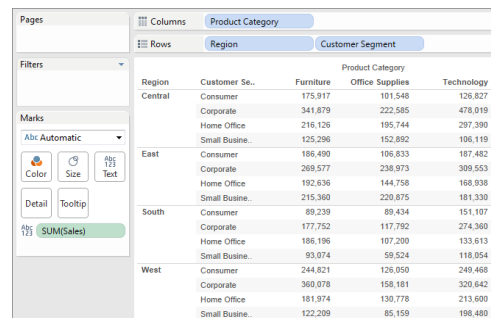
- 2 **Drag a dimension to the Rows shelf**
Click and drag the **Region** field and drop it on the **Rows** shelf.



- 3 **Drag a measure to Text**
Click and drag the **Sales** field and drop it on **Text** on the Marks card.



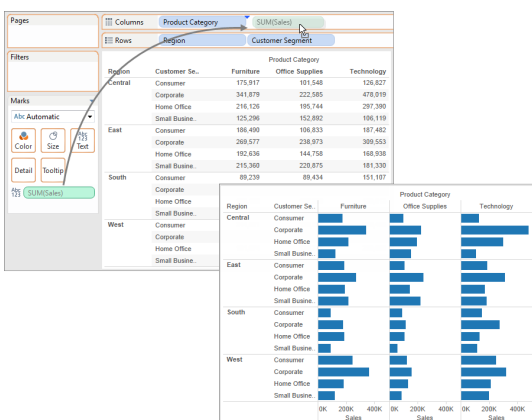
- 4 **Drag another dimension to Rows**
Click and drag the **Customer Segment** field and drop it on the **Rows** shelf.



Region	Customer Segment	Furniture	Office Supplies	Technology
Central	Consumer	175,917	101,548	126,827
	Corporate	341,879	222,585	478,019
	Home Office	216,126	195,744	297,390
	Small Business	125,296	152,892	186,119
East	Consumer	186,490	106,833	187,482
	Corporate	269,577	238,973	309,553
	Home Office	192,636	144,758	168,938
	Small Business	215,360	220,875	181,330
South	Consumer	89,239	89,434	151,107
	Corporate	177,752	117,792	274,360
	Home Office	186,186	107,200	133,613
	Small Business	93,074	59,524	118,054
West	Consumer	244,821	126,050	249,468
	Corporate	360,878	158,181	320,642
	Home Office	181,974	130,778	213,600
	Small Business	122,209	85,159	198,480

You now have a text summary, or a crosstab view of your data.

- 5 **Visualize your data**
Drag the **Sales** measure from Text and drop it on the **Columns** shelf.



- 6 **Use color to show more information**
Drag the **Region** dimension from the Data window and drop it on **Color**.

You can now quickly pick out the best and worst performing products, regions, and markets.

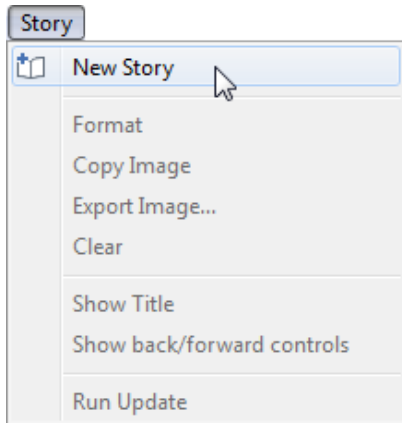


Create a Story

After you create a view you can use it to tell a story with your data. With Tableau Story Points, you can show how facts are connected, provide context, demonstrate how decisions relate to outcomes, and more.

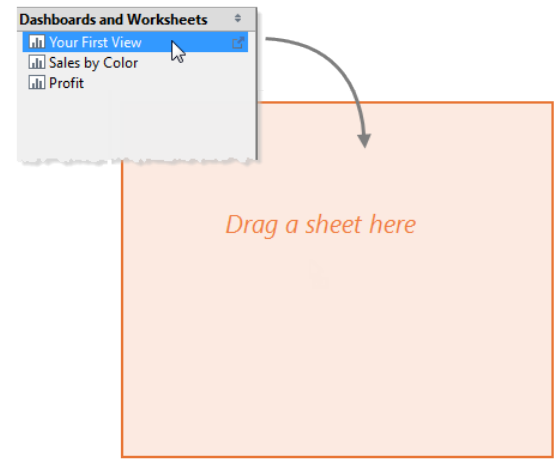
1 Open a new story

From the Story menu, select **New Story**.



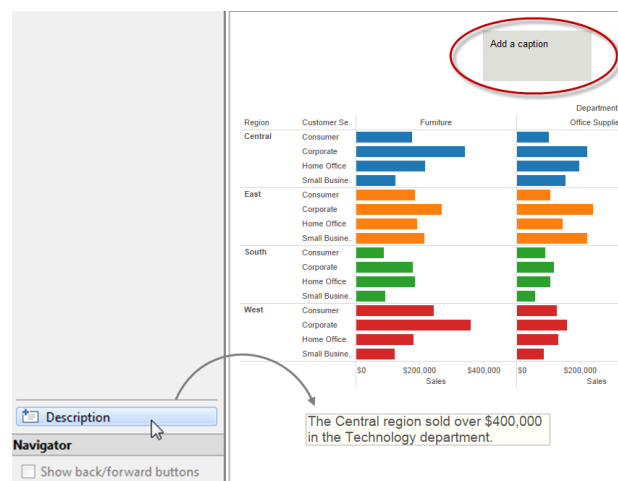
2 Create a story point

Drag a worksheet from the Dashboards and Sheets pane and drop it in the center of the view.



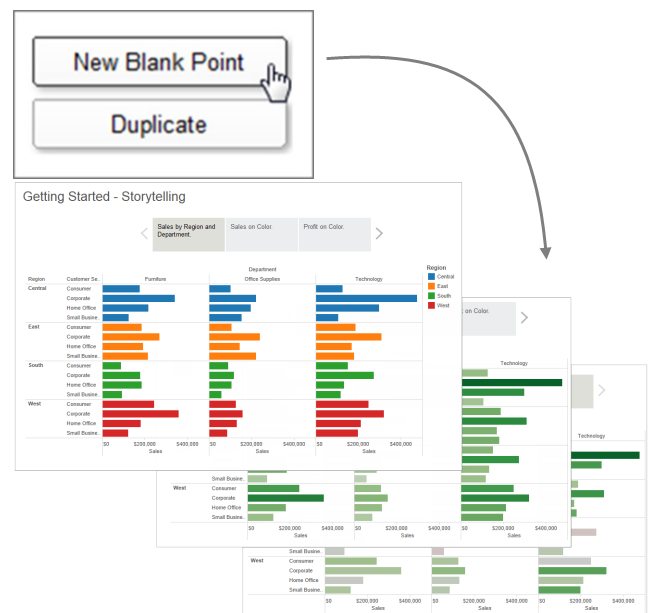
3 Describe the view

Click a story point in the navigator to add a caption. Then add more detail by dragging **Description** to the view.



4 Continue the story

Click **New Blank Point** to add a story point or click **Duplicate** to create a new story point by making changes to the current one.



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