Tableau Product Suite

Paid Tools (14 free trail)

Tableau Prep – Prepare the data for analysis (clean the data, combine the data, ….)

Tableau Desktop – Authoring Tool used to create the dashboards

Tableau Server – Sharing and collaborating platform

Tableau Cloud/Tableau Online – Tableau Server on the cloud (100gb – site)

Free Tools

Tableau Public – free version of Tableau Desktop with a few limitations

Tableau Reader – Open the dashboard in read only mode (desktop app)

Tableau Mobile - Open the dashboard in read only mode (mobile app)

\*\*\*Tableau Desktop Professional Edition – Licensed (paid) version – which is called Tableau Desktop

\*\*\*Tableau Desktop Public Edition – Free Version – which is called Tableau Public

Home Page/Welcome Screen/Start page – 3 sections

\*\*\* Connect – helps us to connect to data bases

Data source Page – Configure the data connection

1. Understand the Requirements
2. Understand the Data
3. Understand your Audience
4. Understand which chart to create when

*Hierarchy*

Category -> Sub-Category -> Products

Country -> regions -> states -> cities -> postal codes

Categorical Data / Qualitative Data – Dimensions

Quantitative Data – Measures

*Data Types-*

Number – Whole

Number – Decimal

String – alphabetical or alpha numerical

Date

Date and Time

Boolean – True/False, Yes/No, Y/N, T/F

*2 Modes of Connection – (Eg: Oracle)*

1. Live – Direct connection with the data in the database

Adv: Up to date information in the reports

DisAdv: No offline access to the data, Performance could be an issue

1. Extract – Fetch a copy of the data and store it on our local machine (it is called tableau data extract (.hyper (10.5)))

Adv: Offline access to the data, performance will be very good

DisAdv: No Up to date information, need to refresh the data from time to time

*Dimensions and Measures*

Measures: - All Numbers except identification numbers

Dimensions: - All non-numerical values (string, date, date and time, Boolean) and identification numbers

*Pills*

Blue Pill (Dimensions) – Indicates Discrete Data – something with a distinct set of values in it. In the graph, it displays the names of the members present in the dimension on the header.

Green Pill (Measures) – Indicates Continuous data – something with a range of values in it. In the graph, it forms an axis (with a range of values) as the header.

Limitations of tableau Public –

1. Limited data source connectivity options