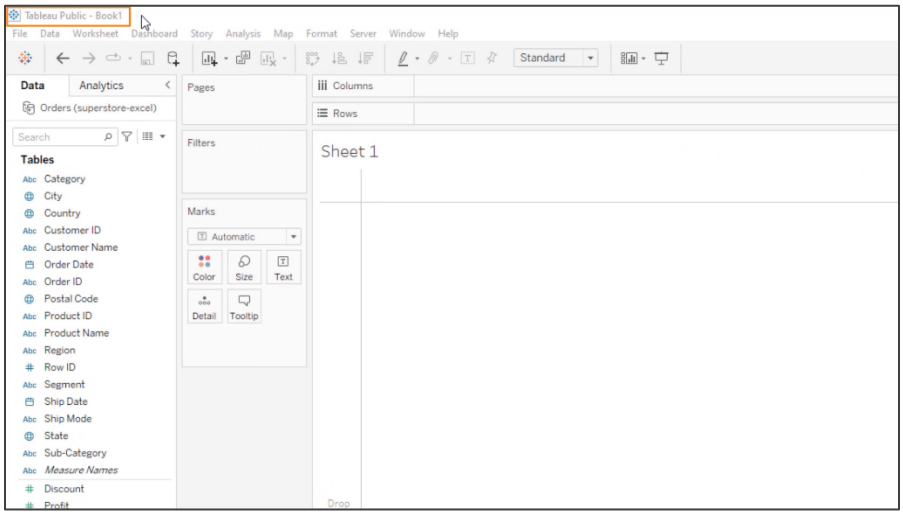
Lesson 04: Demo 03
Introduction to Tableau Workspace

Problem Statement: Use the **superstore-excel** dataset to get familiar with the Tableau workspace.

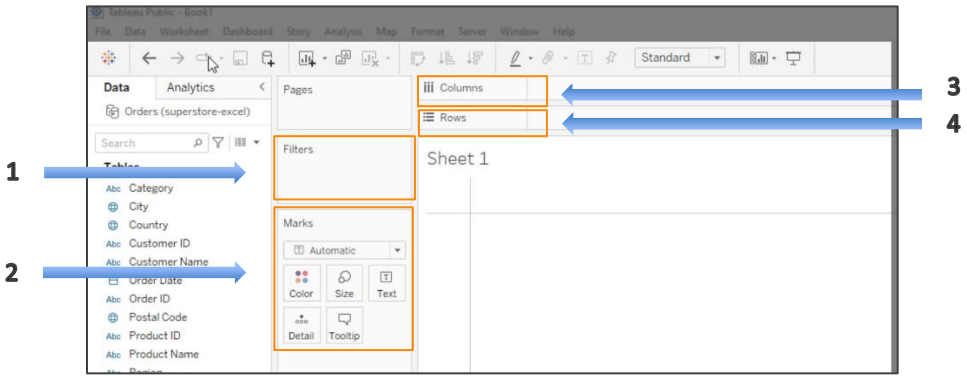
Steps to Perform:

Step 1: View Tableau Public workspace

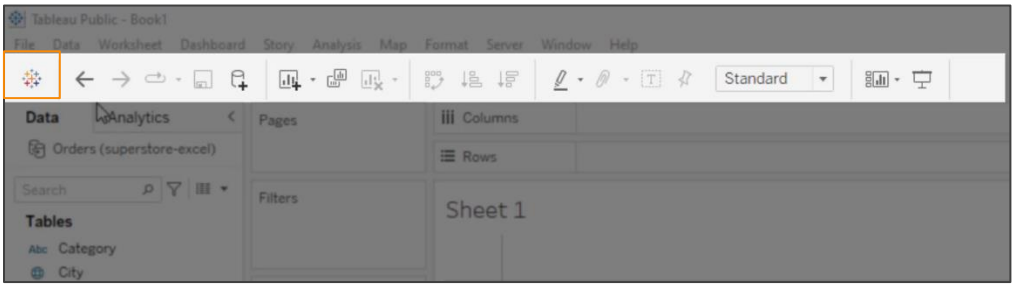
1.1 View the top left corner, which displays the workbook name.



1.2 The **Filter** shelf, **Marks**, **Columns,** and **Rows** shelves are indicated by numbers 1, 2, 3, and 4 in the workbook, as shown in the screenshot.

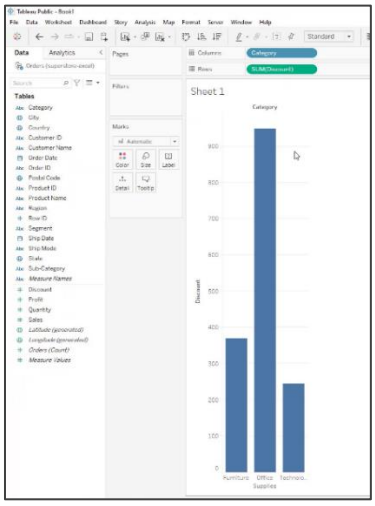


1.3 The toolbar can be seen in the screenshot below. If you click the home button, it will take you back to the home screen.

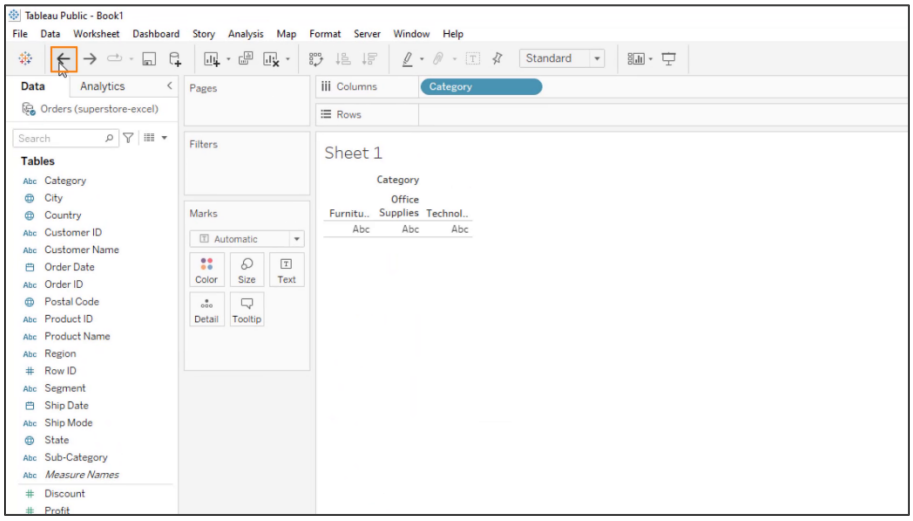


Step 2: Check the functionality of the Back and Forward buttons

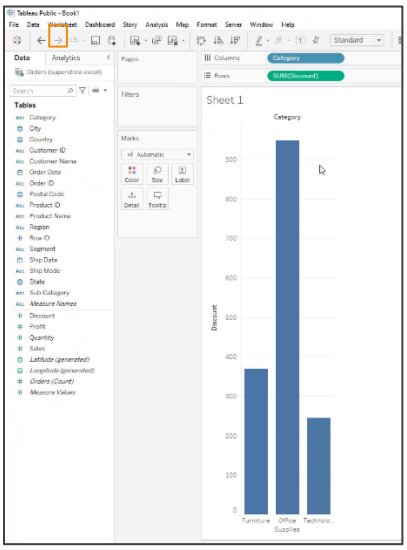
2.1 Drag **Category** to **Columns** and **Discount** to **Rows.** The resulting chart looks like this:



2.2 If you click the **Back** button, Tableau will show the previous state:

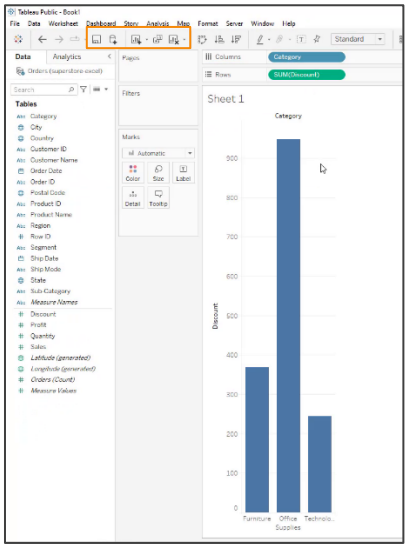


2.3 If you click the **Forward** button, Tableau will show the original state:

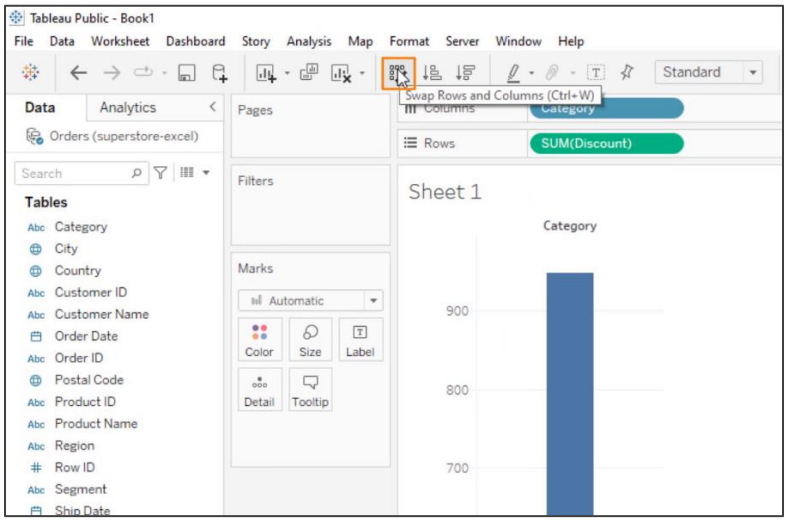


Step 3: Familiarize yourself with the other options on the toolbar

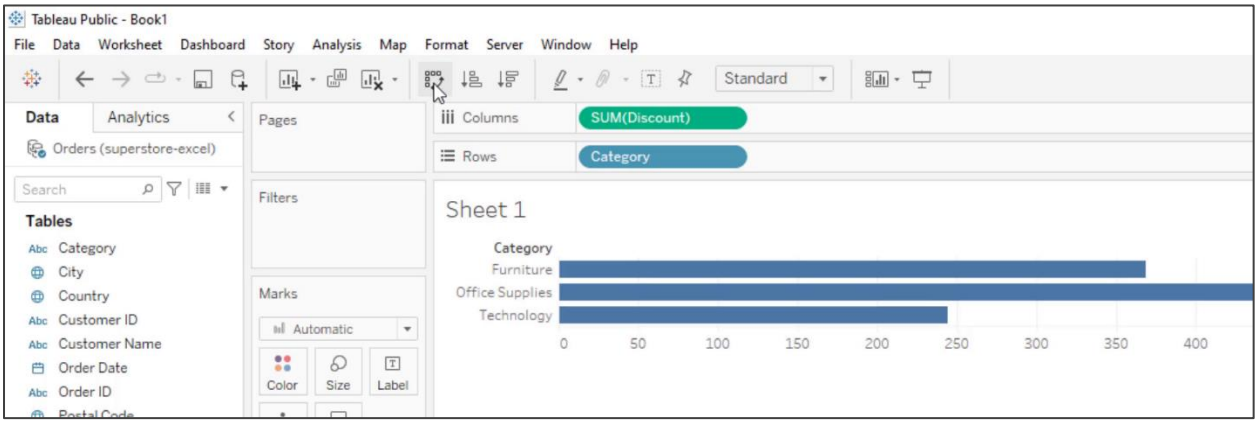
3.1 The screenshot below shows the **Save**, **New Data Source**, **New Worksheet**, **Duplicate**, and **Clear Worksheet** buttons, in the respective order, from left to right.



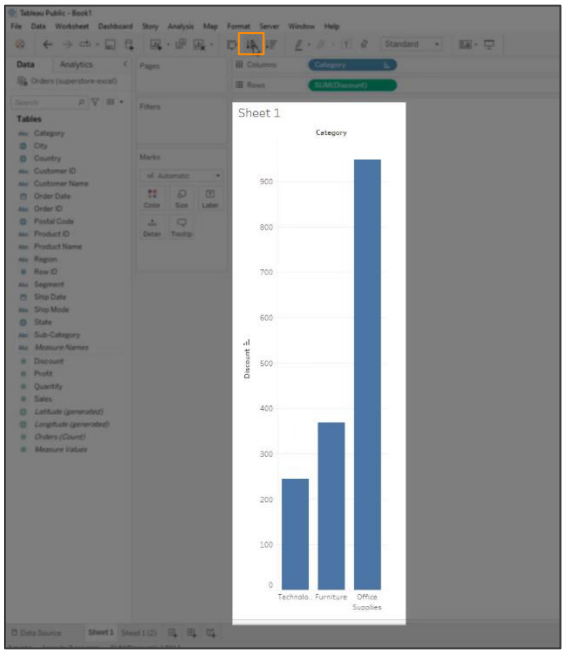
3.2 Using the **Swap Rows and Columns** option, you can swap the current columns with rows.



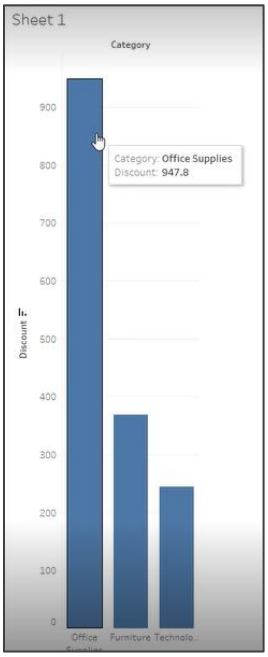
3.3 Upon clicking the **Swap Rows and Columns** button, the **Category** and **SUM(Discount)** fields have switched positions, and the graph has changed accordingly.



3.4 Next on the toolbar is the **Sort Ascending** button. If you click it, the **Category** bars will sort in ascending order.

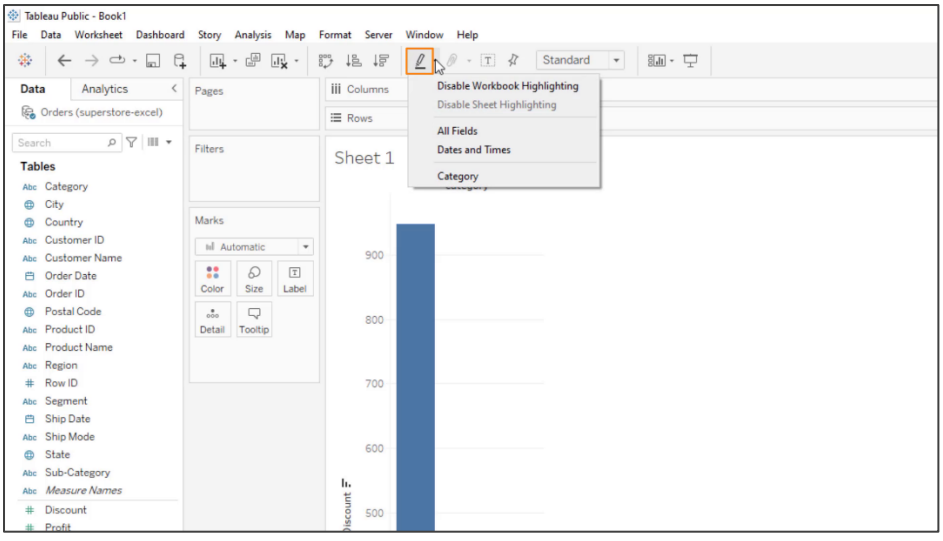


3.5 Next on the toolbar is the **Sort Descending** button. If you click it, the **Category** bars will sort in descending order.

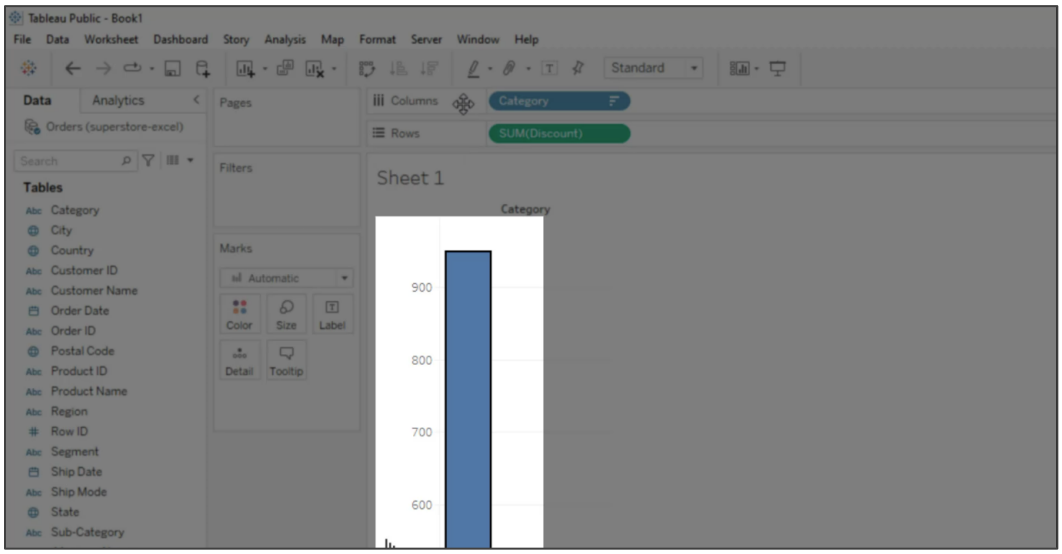


Step 4: View the Highlight option

4.1 Click the **Highlight** button and click the component you want to highlight.

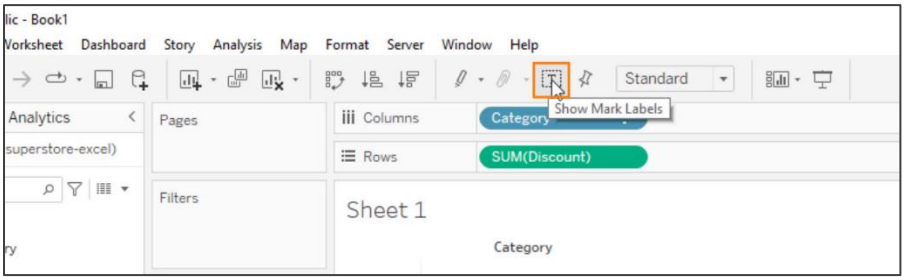


4.2 Observe that the component is highlighted.

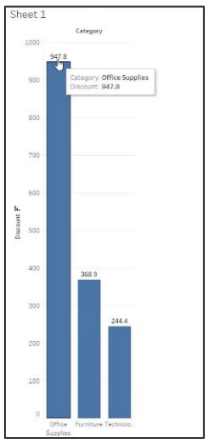


Step 5: View the Show Mark Labels option

5.1 Click on the **Show Mark Labels** option.

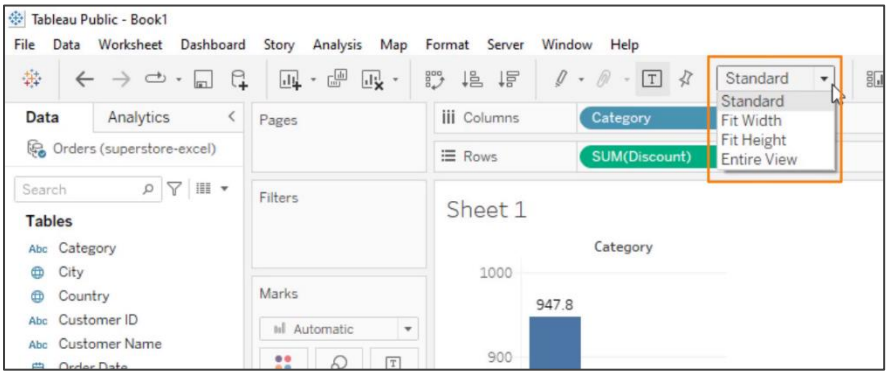


5.2 Now you can see that the label has been generated for each of the individual bars.

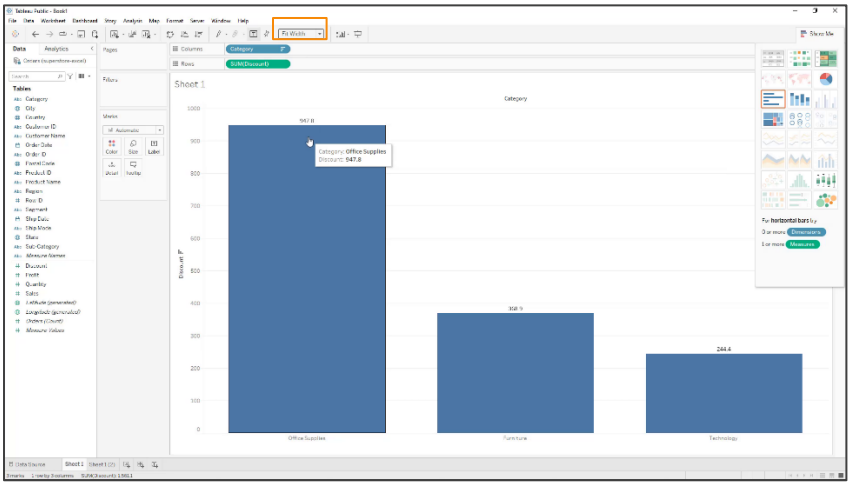


Step 6: Change the size of the charts

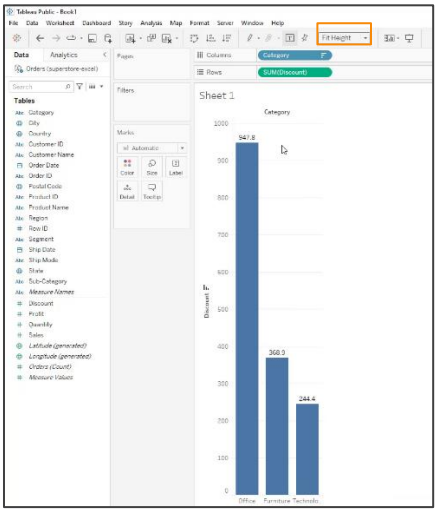
6.1 Click on the drop-down which says, **Standard**.



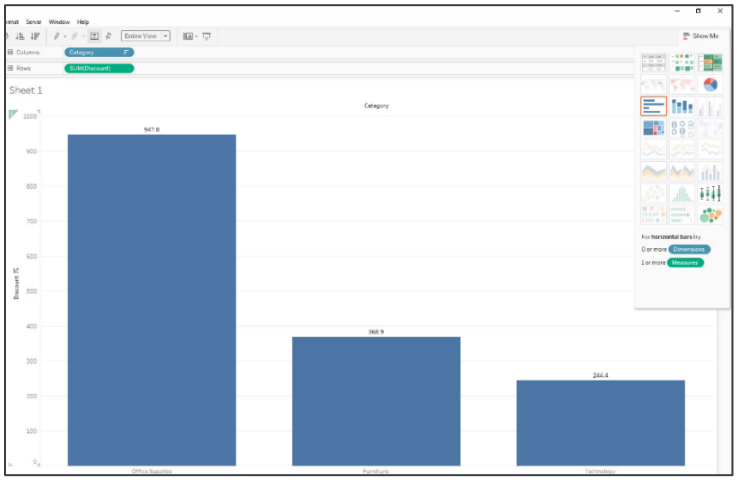
6.2 If you choose **Fit Width,** it will show the following output:



6.3 If you choose **Fit Height,** it will show the following output:

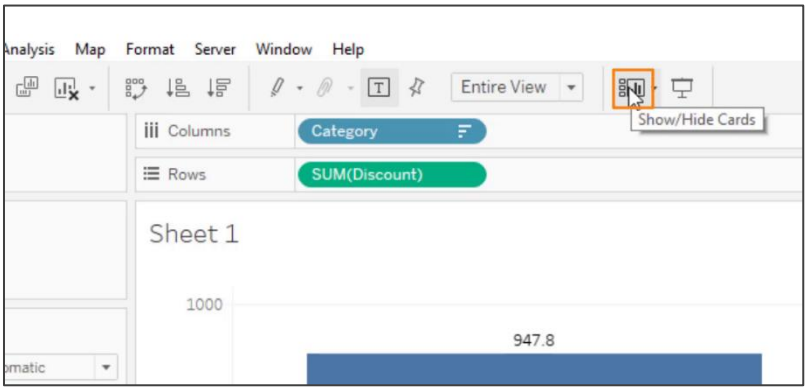


6.4 If you choose **Entire View,** it will show the entire view, spanning through the canvas.

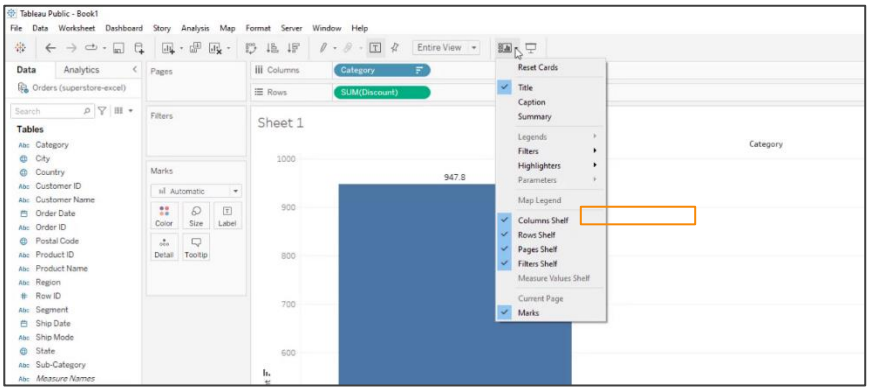


Step 7: Explore the Show/Hide Cards option

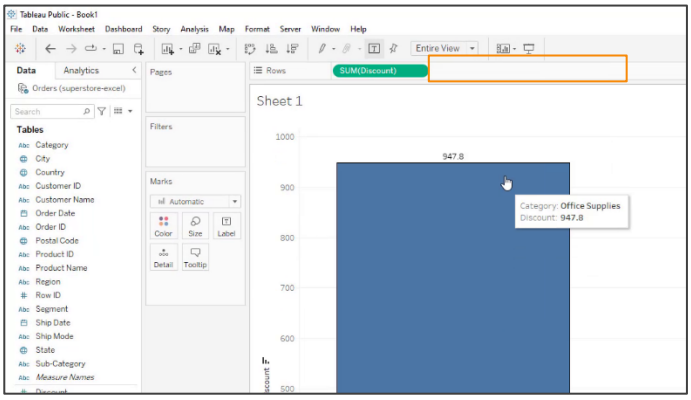
7.1 Click on the **Show/Hide Cards** button.



7.2 Uncheck the **Columns Shelf**.

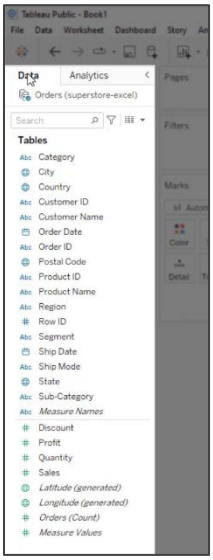


7.3 Now, you can only see the **Rows** shelf and the **Columns** shelf will be hidden.

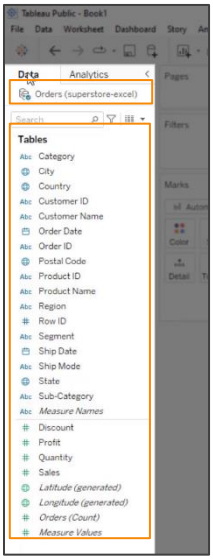


Step 8: Explore the sidebar

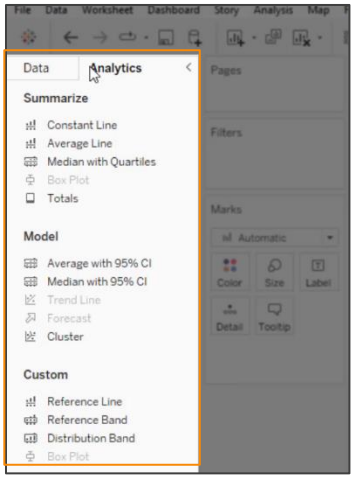
8.1 The sidebar, as shown in the screenshot, contains the **Data** and the **Analytics** panes.



8.2 In the **Data** pane, you can see Tableau's connection with the Excel sheet. You can also see the different columns present in the table.

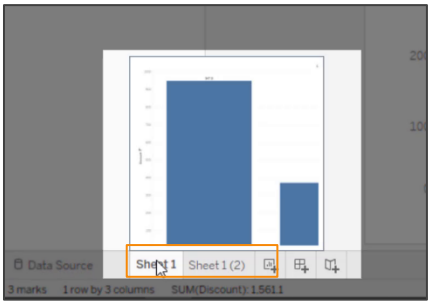


8.3 Observe the Analytics pane, which gives you different analytical functions where we can draw the average line, median, quartiles, clustering, and average confidence interval.

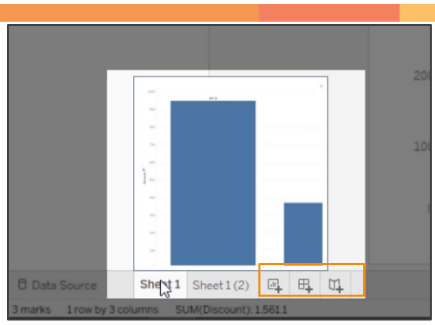


Step 9: Observe the sheets tab

9.1 The sheets tab is located at the bottom of the screen.



9.2 You can click and get a **New Worksheet,** a **New Dashboard,** and a **New Story** by clicking the highlighted buttons respectively.


Data Source
Sheet 1
Sheet 1 (2)
3 marks
1 row by 3 columns
SUM(Discount): 1.561 1