# The Text Below Outlines the Previous Video

Connecting to data

Time to get started using Tableau. The first step is to load some data.

I've provided a data set you'll use for the rest of this lesson. The data set consists of transaction records for the Global Superstore, as well as returns, and a list of the members of the sales team. You can find the Excel file in the Resources, go ahead and download it.

DOWNLOAD DATA

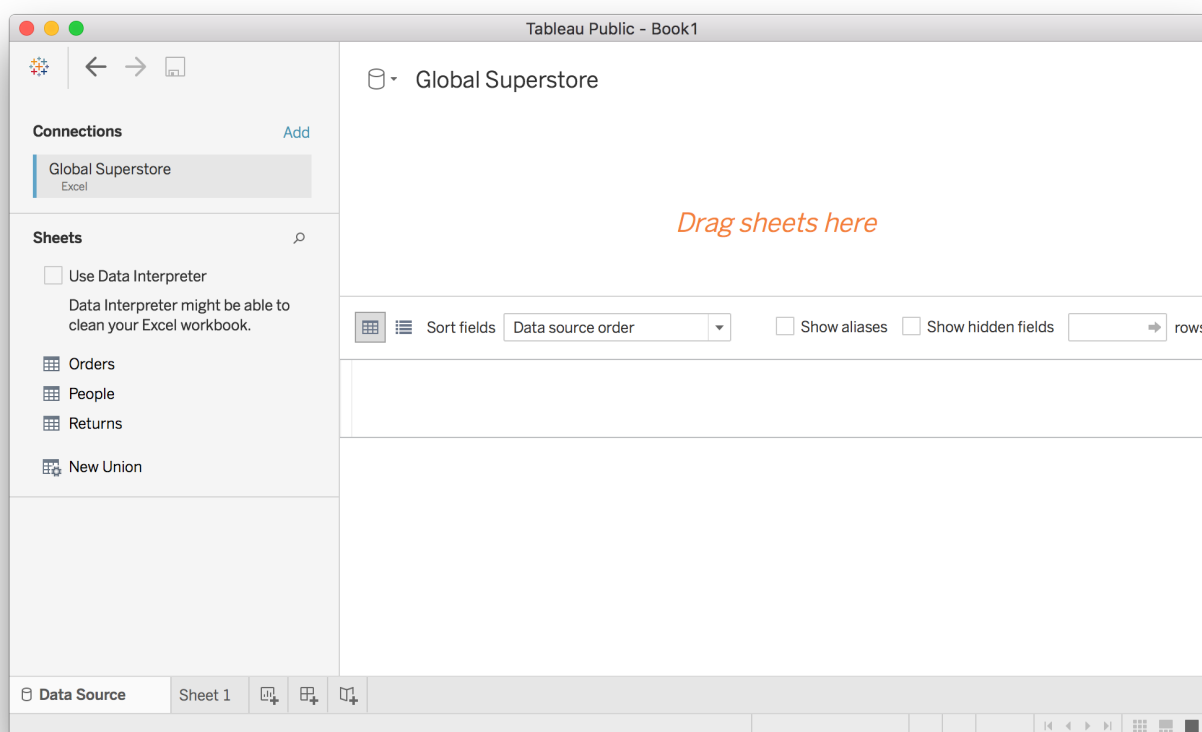If you haven't yet, start up Tableau. You should see something like this (if you have version 10):
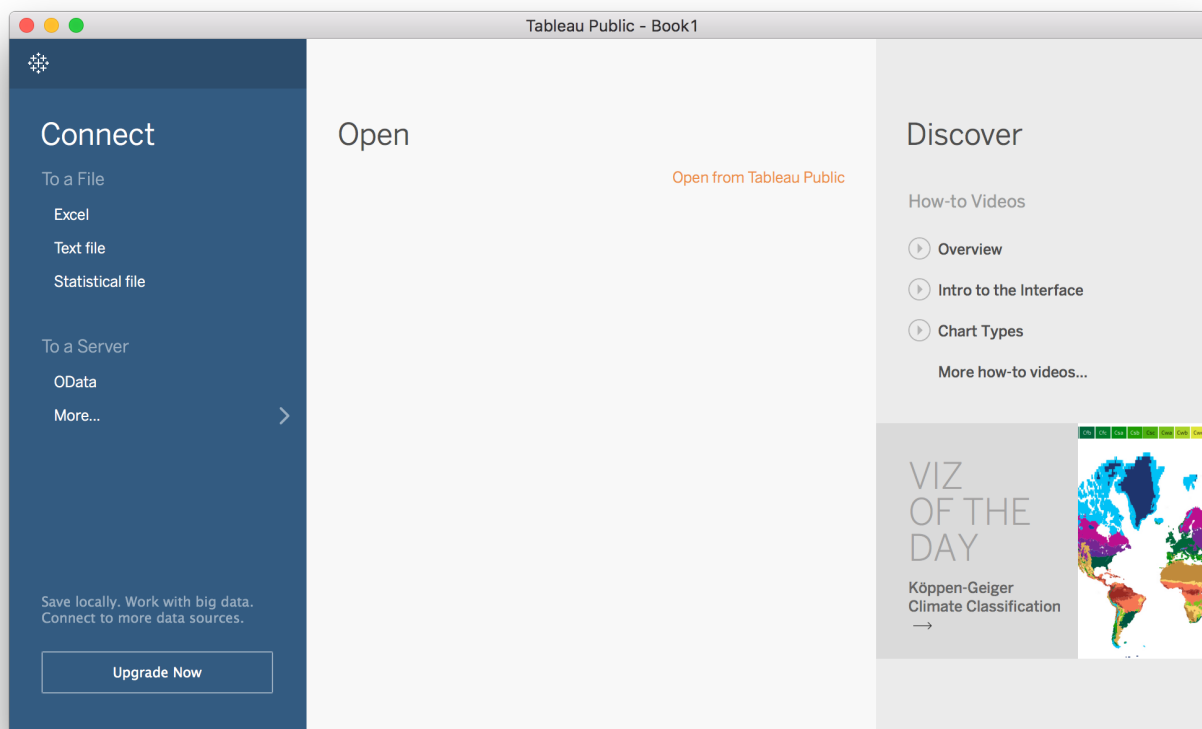
and R.

You can also connect to some remote sources (To a Server) with OData. You can also connect to Google Sheets (click through **More...**).

Time to load the Global Superstore data. Click on "Excel", then select the Global Superstore Excel file.

With Tableau connected to the data, you should see the sheets in the Excel file (*Orders*, *People*, and *Returns*) in the left sidebar. There's big orange letters tell you to drag a sheet over there, so drag the *Orders* sheet onto the top panel.

You should see a preview of the data from the orders in the lower panel now. I also used the Data Interpreter here (it's the checkbox on the left). The Data Interpreter attempts to clean and format the data so that it's easier to use in Tableau.

Tableau automatically finds the columns labels in the header row. It also attempts to detect the data type for each column. The little icons in the header bar indicate the data type of the column. **Row ID** is numerical data, **Order ID** is text, **Order Date** is a date, and so on.

# Orders **Row ID**	Abc Orders **Order ID**	📅 Orders **Order Date**	📅 Orders **Ship Date**	Abc Orders **Ship Mode**
32298	CA-2012-124891	7/31/12	7/31/12	Same Day
26341	IN-2013-77878	2/5/13	2/7/13	Second Class
25330	IN-2013-71249	10/17/13	10/18/13	First Class

Tableau also finds geo spatial data as you can see below.

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Corporate	Wollongong	New South Wal…	Australia	*null*	APAC	Oceania	FUR-CH-1
Consumer	Brisbane	Queensland	Australia	*null*	APAC	Oceania	TEC-PH-10

Abc Orders **Product Name**	# Orders **Sales**	# Orders **Quantity**	# Orders **Discount**	# Orders **Profit**	# Orders **Shipping Cost**	Abc Orders **Order Priority**
Plantronics CS510 - …	2,309.65	7	0.000000	762.18	933.570	Critical
Novimex Executive L…	3,709.40	9	0.100000	-288.77	923.630	Critical
Nokia Smart Phone, …	5,175.17	9	0.100000	919.97	915.490	Medium

Returns
Orde…0000
New Union

Data Source   Sheet 1

You might have noticed that the numerical icons (#) in the headers are blue in the first image but green in the one above. Tableau guesses if numerical data is discrete or continuous and indicates this with color, blue for discrete and green for continuous. You'll see this color coding again later.

Tableau doesn't always make the best guess for the data type, so you can set it manually by clicking on the data type symbol.

#	Abc	Orders **Order Date**	Orders **Ship Date**
Number (decimal)			
✓ **Number (whole)**			
Date & Time	891	7/31/12	7/31/12
Date	78	2/5/13	2/7/13
String			
Boolean	49	10/17/13	10/18/13
✓ **Default**	93…	1/28/13	1/30/13
Geographic Role ▶	0	11/5/13	11/6/13
22732	IN-2013-42360	6/28/13	7/1/13
30570	IN-2011-81826	11/7/11	11/9/11
31192	IN-2012-86369	4/14/12	4/18/12
40155	CA-2014-135909	10/14/14	10/21/14

For instance, you might want to change the Row ID to a string (text) because you aren't going to be doing any math with it, it's just an identifier. Go ahead and check it out yourself.

click on the triangle which drops down a menu, or just double click on the column name.

With string columns, you can do some simple transformations such as splitting the data into multiple columns. For instance, the Order IDs have three parts separated by dashes. You might want individual columns for each of these parts. To split the column, click on the little triangle in the column header.

Orders Row ID	Orders Order ID			D -
32298	CA-2012-12489	**Rename**		
		Copy Values		
26341	IN-2013-77878	**Hide**		
25330	IN-2013-71249	**Aliases...**		
13524	ES-2013-15793.	**Create Calculated Field...**		
		Create Group...		
47221	SG-2013-4320	**Split**		
		Custom Split...		
22732	IN-2013-42360	Pivot (select multiple fields)		
30570	IN-2011-81826	**Describe...**		

This does an automatic split where Tableau guesses the character separating the parts, a dash here. You can also do a custom split (select *Custom Split...* instead) to choose a different character to split on. After the split, there will be new columns for each part. Here's what it looks like, try it yourself.

Abc Orders **Order ID**	=Abc Calculation **Order ID - Split 1**	=# Calculation **Order ID - Split 2**	=# Calculation **Order ID - Split 3**
CA-2012-124891	CA	2012	124891
IN-2013-77878	IN	2013	77878
IN-2013-71249	IN	2013	71249
ES-2013-15793...	ES	2013	1579342
SG-2013-4320	SG	2013	4320
IN-2013-42360	IN	2013	42360
IN-2011-81826	IN	2011	81826

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the documentation, but I'll cover calculated fields in detail later.

View data

Something I find useful often is being able to quickly preview the data in a table. If you hover over one of the sheets, an icon appears to the right. Clicking on this lets you view the data.

NEXT