



The Text Below Outlines the Previous Video

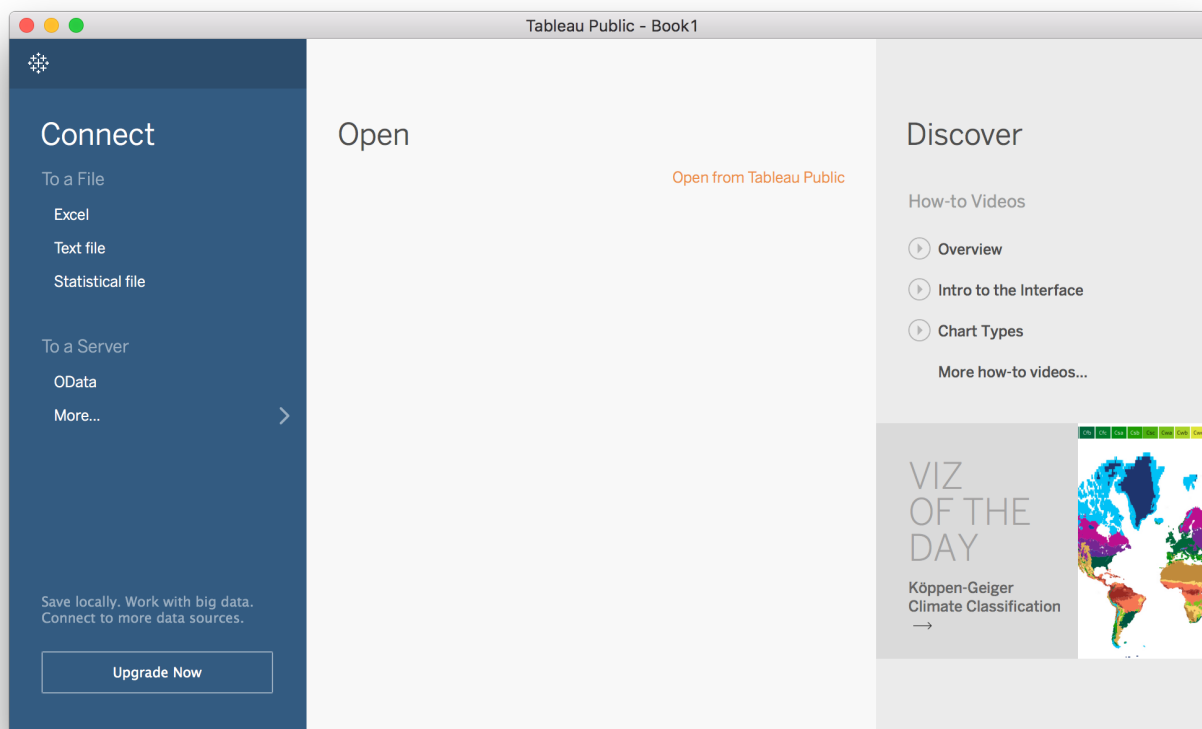
Connecting to data

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):



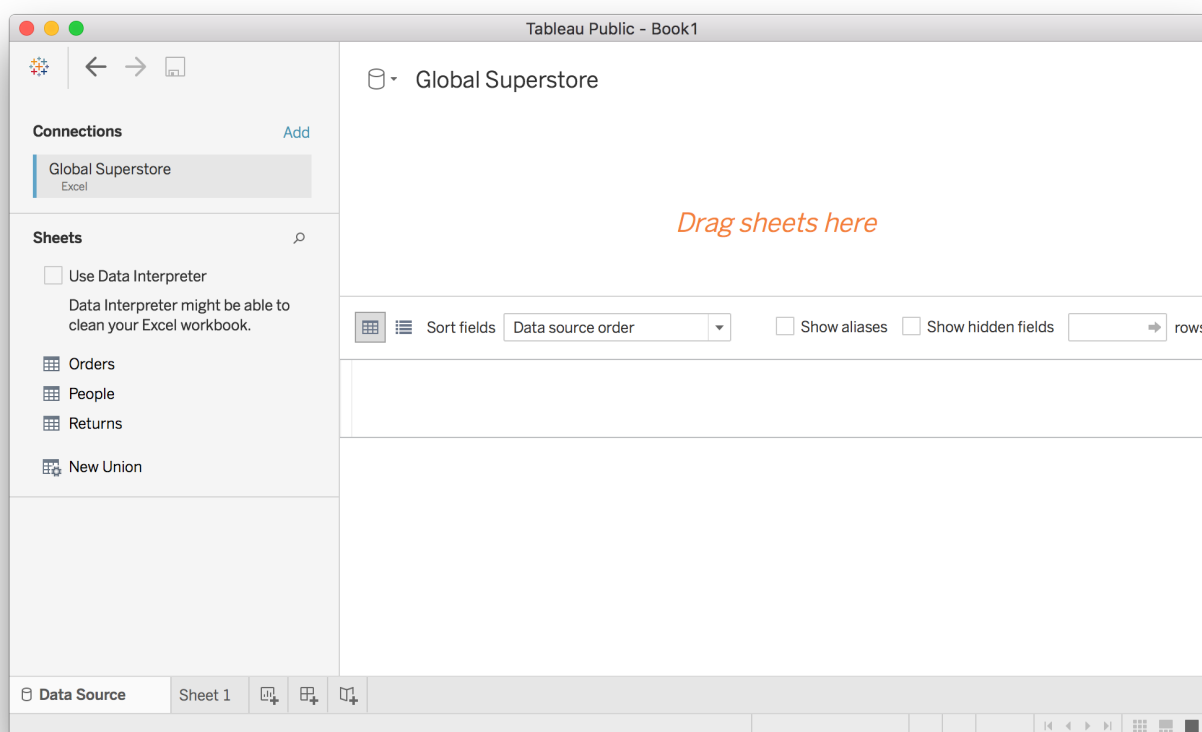


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and R.

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.



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The screenshot shows the Tableau interface with the 'Orders' data source selected. The 'Data Interpreter' checkbox is checked. The data table has the following columns and rows:

# Orders Row ID	Abc Orders Order ID	Orders Order Date	Orders Ship Date	Abc Orders Ship Mode	Abc Orders Customer ID	Abc Orders Customer Name
32298	CA-2012-124891	7/31/12	7/31/12	Same Day	RH-19495	Rick Hansen
26341	IN-2013-77878	2/5/13	2/7/13	Second Class	JR-16210	Justin Ritter
25330	IN-2013-71249	10/17/13	10/18/13	First Class	CR-12730	Craig Reiter
13524	ES-2013-15793...	1/28/13	1/30/13	First Class	KM-16375	Katherine Murray
47221	SG-2013-4320	11/5/13	11/6/13	Same Day	RH-9495	Rick Hansen
22732	IN-2013-42360	6/28/13	7/1/13	Second Class	JM-15655	Jim Mitchum
30570	IN-2011-81826	11/7/11	11/9/11	First Class	TS-21340	Toby Swindell
31192	IN-2012-86369	4/14/12	4/18/12	Standard Class	MB-18085	Mick Brown

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
<div> <div>Returns</div> <div>Orde...0000</div> <div>New Union</div> </div>	<div> <div>ABC</div> <div>Orders</div> <div>Product Name</div> </div>	<div> <div>#</div> <div>Orders</div> <div>Sales</div> </div>	<div> <div>#</div> <div>Orders</div> <div>Quantity</div> </div>	<div> <div>#</div> <div>Orders</div> <div>Discount</div> </div>	<div> <div>#</div> <div>Orders</div> <div>Profit</div> </div>	<div> <div>#</div> <div>Orders</div> <div>Shipping Cost</div> </div>	<div> <div>ABC</div> <div>Orders</div> <div>Order Priority</div> </div>	
	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	

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	Orders
		Order Date	Ship Date
<div> <div>Number (decimal)</div> <div>✓ Number (whole)</div> <div>Date & Time</div> <div>Date</div> <div>String</div> <div>Boolean</div> <div>✓ Default</div> <div>Geographic Role ▶</div> </div>			
	891	7/31/12	7/31/12
	78	2/5/13	2/7/13
	49	10/17/13	10/18/13
	93...	1/28/13	1/30/13
	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.



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

Orders Row ID	Orders Order ID	Orders Order Date	Orders Ship Date	<div> Rename Copy Values Hide Create Calculated Field... Create Group... Pivot (select multiple fields) Describe... </div>	
32298	CA-2012-124891	7/31/12	7/31/12	Same Day	RH-19495
26341	IN-2013-77878	2/5/13	2/7/13	Second Class	JR-16210
25330	IN-2013-71249	10/17/13	10/18/13	First Class	CR-12730
13524	ES-2013-15793...	1/28/13	1/30/13	First Class	KM-16375
47221	SG-2013-4320	11/5/13	11/6/13	Same Day	RH-9495
22732	IN-2013-42360	6/28/13	7/1/13	Second Class	JM-15655
# Orders Row ID	Abc Orders Order ID	📅 Orders Order Date	📅 Orders Ship Date	Abc Orders Ship Mode	Abc Orders Customer ID
32298	CA-2012-124891	7/31/12	7/31/12	Same Day	RH-19495
26341	IN-2013-77878	2/5/13	2/7/13	Second Class	JR-16210
25330	IN-2013-71249	10/17/13	10/18/13	First Class	CR-12730
13524	ES-2013-15793...	1/28/13	1/30/13	First Class	KM-16375
47221	SG-2013-4320	11/5/13	11/6/13	Same Day	RH-9495
22732	IN-2013-42360	6/28/13	7/1/13	Second Class	JM-15655

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.



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Row ID	Order ID	Rename Copy Values Hide
32298	CA-2012-124891	
26341	IN-2013-77878	Aliases...
25330	IN-2013-71249	Create Calculated Field...
13524	ES-2013-15793...	Create Group...
47221	SG-2013-4320	Split
22732	IN-2013-42360	Custom Split...
30570	IN-2011-81826	Pivot (select multiple fields)
		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.

Tableau Public - Book1

Orders (Global Superstore)

Filters 0 | Add

Connections: Global Superstore (Excel)

Sheets: Cleaned with Data Interpreter (Review the results. (To undo changes, clear the check box.))

Orders (icon) People (icon) Returns (icon) Orders A1:X10000 (icon) New Union (icon)

Data source order: [dropdown] Show hidden fields: 1,000

# Orders Row ID	Abc Orders Order ID	*Abc Calculation Order ID - Split 1	*# Calculation Order ID - Split 2	*# Calculation Order ID - Split 3	Orders Order Date	Orders Ship Date
32298	CA-2012-124891	CA	2012	124891	7/31/12	7/31/12
26341	IN-2013-77878	IN	2013	77878	2/5/13	2/7/13
25330	IN-2013-71249	IN	2013	71249	10/17/13	10/18/13
13524	ES-2013-15793...	ES	2013	1579342	1/28/13	1/30/13
47221	SG-2013-4320	SG	2013	4320	11/5/13	11/6/13
22732	IN-2013-42360	IN	2013	42360	6/28/13	7/1/13
30570	IN-2011-81826	IN	2011	81826	11/7/11	11/9/11
21192	IN-2012-86369	IN	2012	86369	4/14/12	4/18/12

NEXT