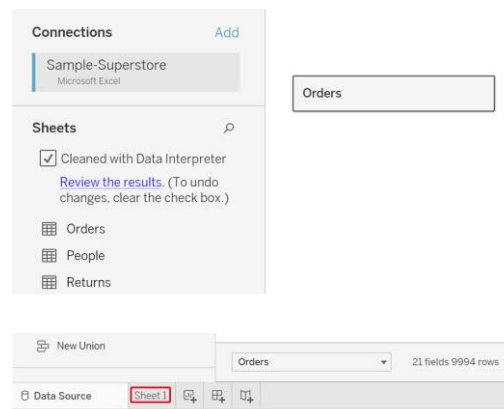


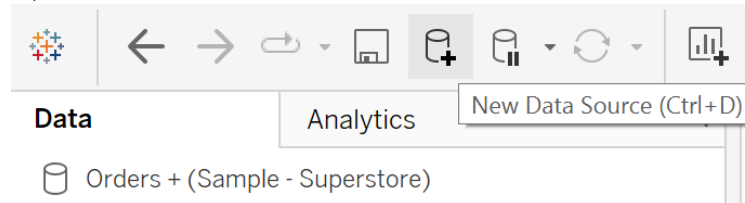


## EXERCISE 01 Part 1: Blending in Tableau

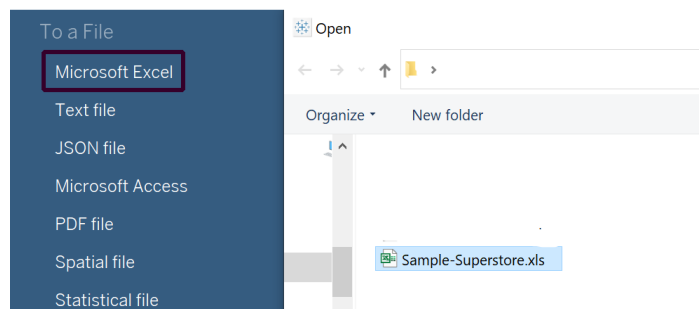
1. Load the **Sample-Superstore** Excel file using the **Connect** option from the location where the files are saved.
2. Drag the **Order** table into the logical layer and go to **Sheet 1**.



3. In a data blend, create the linking at the worksheet level and not at the data source level. Inside the worksheet, you will be able to see the **Orders** table and its columns. Add a new data source, as follows (see the highlighted option):

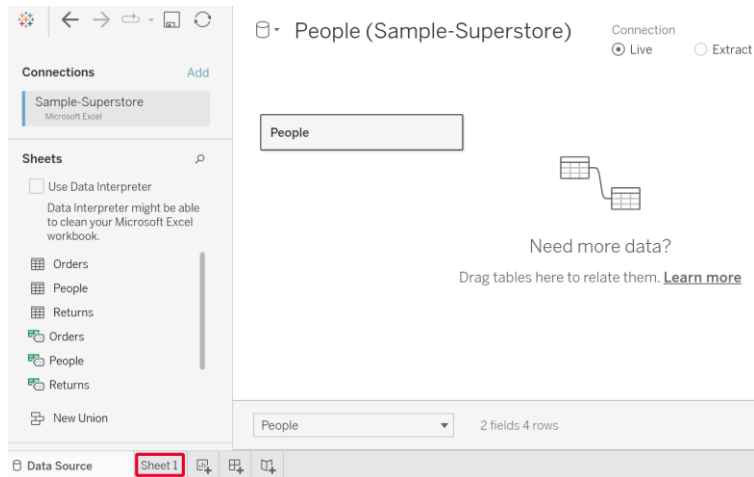


4. This should lead to the same menu that you get for connecting to a data source. Click on **Microsoft Excel**, navigate to the location of the **Sample - Superstore.xls** Excel file, and click on **Open** to open the **Connect** pane.

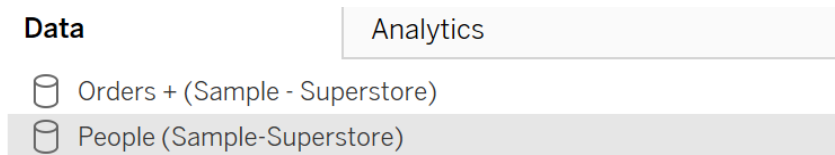




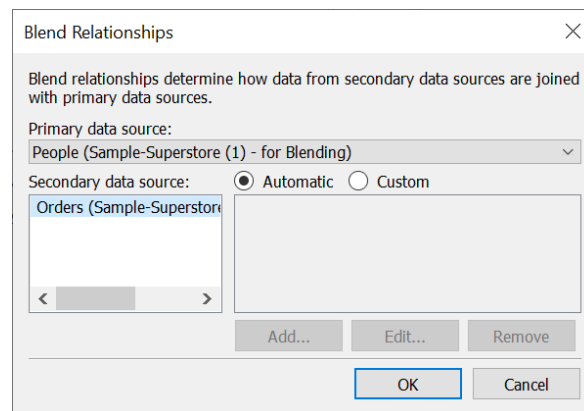
5. Now, drag the **People** table to the canvas and go to **Sheet 1** like before:



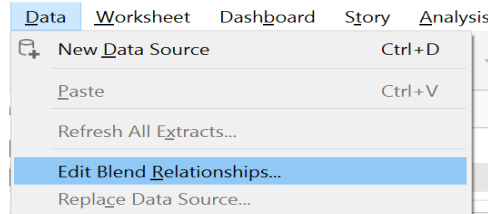
Now, you will be able to see the two data sources, as follows:



6. Add a relationship between these data sources to use them. To do that, click on **Data | Edit Blend Relationships...** to open the popup.



7. Based on the field names, the relationship can be set to **Automatic** by default. To change it, click on **Custom** and add the relationship. Edit the relationship to **Area** and **Region**, as highlighted in the following figure. Click **OK** to add the relationship:
8. Then click ok again for the Blend Relationships window



#### Blend Relationships

Blend relationships determine how data from secondary data sources are joined with primary data sources.

Primary data source:  
People (Sample-Superstore)

Secondary data source:  
Orders + (Sample - Superstore)

☒ Automatic ☐ Custom

Region	Region
--------	--------

9. Based on the field names, the relationship can be set to **Automatic** by default. To change it, click on **Custom** and add the relationship. Edit the relationship to **Customer Name** and **Person**, as highlighted in the following figure. Select **Region** and then Edit... before making the selections in the popup. Click OK to add the relationship:

Blend Relationships

Blend relationships determine how data from secondary data sources are joined with primary data sources.

Primary data source:  
People (Sample-Superstore)

Secondary data source:  
Orders + (Sample - Superstore)

☐ Automatic ☒ Custom

Region	Region
--------	--------

Add... Edit... Remove

OK Cancel

Add/Edit Field Mapping

Primary data source field:  
Search  
Person  
Region

Secondary data source field:  
Search  
Category  
City  
Country/Region  
Customer ID  
Customer Name  
Order Date  
Order ID  
Postal Code

#### Blend Relationships

Blend relationships determine how data from secondary data sources are joined with primary data sources.

Primary data source:  
People (Sample-Superstore)

Secondary data source:  
Orders + (Sample - Superstore)

☐ Automatic ☒ Custom

Person	Customer Name
--------	---------------



## EXERCISE 01 Part 2: Visualizing Data Created from a Data Blend

In the previous exercise, you learned how to perform data blending between two data sources. In this exercise, you will create a visualization on the blended data to understand the application of a data blend – again, you will continue using the Orders table and the People table for this purpose. Note that a blend will only be active if you use the fields from these two data sources; otherwise, it will remain inactive.

1. On the **Orders** data, click and drag **Customer Name** to Rows
  - This will now become your **primary data source**, indicated by the **blue tick** on the data source.

The screenshot shows the Tableau Desktop interface. In the 'Data' pane, 'Orders + (Sample - Superstore)' is selected with a blue tick, indicating it is the primary data source. 'People (Sample-Superstore)' is also listed. The 'Customer Name' field is dragged to the Rows shelf. The Marks shelf is set to 'Automatic'. The view shows a table of customer names.

Customer Name
Aaron Bergman
Aaron Hawkins
Aaron Smayling
Adam Bellavance
Adam Hart
Adam Shillingsburg

2. Repeat the step for the **People** data source.
  - This will become your **secondary data source**, indicated by the **orange tick** on the data source. Also, notice the red linking icon that is used to link the two data sources.

The screenshot shows the Tableau Desktop interface. In the 'Data' pane, 'Orders + (Sample - Superstore)' is selected with a blue tick, and 'People (Sample-Superstore)' is selected with an orange tick, indicating it is the secondary data source. The 'Person' field is dragged to the Columns shelf. A red linking icon is visible next to the 'Person' field.

3. When you filter on **Person** for the four people that you have in the **People** data, you will see that you have linked these values between these data sources. Click on the **Person** column dropdown and then **Filter...**, **uncheck** the **Null** value, and click **OK** to add the filter.



Customer Name	Person
Aaron Bergman	Null
Aaron Hawkins	Null
Aaron Smayling	Null

Filter [Person]

General Wildcard Condition Top

☒ Select from list ☐ Custom value list ☐ Use all

Enter search text

☐ Null

☒ Anna Andreadi

☒ Cassandra Brandow

☒ Chuck Magee

☒ Kelly Williams

You will get the following output, which shows the customer name matching **Person**:

Customer Name	Person	
Anna Andreadi	Anna Andreadi	Abc
Cassandra Brandow	Cassandra Brandow	Abc
Chuck Magee	Chuck Magee	Abc
Kelly Williams	Kelly Williams	Abc