



TABLEAU INTERFACE and VARIOUS FILE EXTENSIONS

Tableau Public homepage - design

File Data Help

Connect

To a file

- Excel
- Text File
- Access
- Statistical File

To a server

- OData
- More Servers... >

Open

Tanvi_assignment

assignment dexlab

Profit Across States

Open from Tableau Public

Discover

How-to Videos (view all)

- Overview
- Intro to the Interface
- Chart Types

VIZ OF THE DAY

2016 Global Nutrition Report

Blog - Viz All Things Politics f Month!

Tableau desktop home page - design

File Data Server Help

Connect

To a file

- Excel
- Text File
- Access
- Statistical File
- Other Files

To a server

- Tableau Server
- Microsoft SQL Server
- MySQL
- Oracle
- Amazon Redshift
- More Servers... >

Saved data sources

- Sample - Superstore
- World Indicators

Open

Geo Map Store Vi... Bill Details SKU Performance... PlannedVsActual... PlannedSalesDiff... PlannedSalesValue...

PlannedVsActual... PlannedSalesDiff... PlannedSalesValue Actual Sales Rep... Planned Sales Val... PlannedSales New

BMC&StoreSales... PlannedSalesValu... Geo Map Store Vi... Bill Details View PlannedSalesValue SKU Multiple Vis...

Discover

Training (view all)

- Getting Started
- Connecting to Data
- Visual Analytics

VIZ OF THE WEEK

A Thousand Mythic Songs You Should Listen To

Blog - Beyond the Fitbit: Quantifying Forgiveness, Gratitude, and Beyond

Virtual Tableau Conference 2015

Forums

Open a workbook

The screenshot shows the Tableau desktop interface. On the left, there's a sidebar with sections for 'Connect' (file types like Excel, Text File, Access, etc.), 'To a server' (Tableau Server, Microsoft SQL Server, MySQL, Oracle, Amazon Redshift), and 'Saved data sources' (Sample - Superstore, World Indicators). The main area has sections for 'Open' (with thumbnails for Geo Map, Bill Details, SKU Performance, etc.) and 'Discover' (with training links, VIZ OF THE WEEK, and blog posts). A 'Sample Workbooks' section at the bottom shows three sample dashboards. The top right features a 'VIZ OF THE WEEK' for 'A Thousand Mythic Songs You Should Listen To' with a bar chart, and the bottom right has links for the 'Virtual Tableau Conference 2015' and 'Forums'.

Tableau homepage

CONNECT option which takes you to data connection workspace like excel, csv and several other databases.

OPEN option displays the different workbooks which you have created and saved recently.

OPEN A WORKBOOK options gives you a older workbook to work on.

SAMPLE WORKBOOKS provides links to sample workbooks containing example materials.

SAVED DATASOURCE helps to save the data source which would be required frequently to create the visualization. It will save all the modifications done to the original data like sets, bin, joins, blends and more.



Tableau worksheet- design

Tableau - Book1

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Show Me

Data Analytics Pages Columns SUM(Sales) SUM(Sales)

Orders (Sample - Supers... Rows Sub-Category

Search

Tables

- ABC Category
- City
- Country/Region
- Customer ID
- Customer Name
- Order Date
- Order ID
- Postal Code
- Product ID
- Product Name
- Region
- Row ID
- Segment
- Ship Date
- Ship Mode
- State
- Sub-Category
- Measure Names
- Discount
- Profit
- Quantity
- Sales
- Latitude (generated)
- Longitude (generated)
- Orders (Count)
- Measure Values

Marks ▲ All Multiple

Colour Size Label Detail Tooltip Multiple fields

Sub-Catego..

Sub Category Sales & Profit

Accessories

Appliances

Art

Binders

Bookcases

Chairs

Copiers

Envelopes

Fasteners

Furnishings

Labels

Machines

Paper

Phones

Storage

Supplies

Tables

SUM(Sales) 0.00

SUM(Sales) 0.00

SUM(Profit) -55,618 55,618

Sub-Category	Sales (K)	Profit (K)
Accessories	170	55,618
Appliances	110	55,618
Art	30	55,618
Binders	220	55,618
Bookcases	120	55,618
Chairs	330	55,618
Copiers	150	55,618
Envelopes	20	55,618
Fasteners	10	55,618
Furnishings	90	55,618
Labels	10	55,618
Machines	190	55,618
Paper	80	55,618
Phones	330	55,618
Storage	220	55,618
Supplies	50	55,618
Tables	210	55,618

OK 20K 40K 60K 80K 100K 120K 140K 160K 180K 200K 220K 240K 260K 280K 300K 320K 340K

Sales

Data Source Sheet 1 Sub Category Sales & Profit

34 marks 17 rows by 1 column SUM(Sales): 2,297,201

Type here to search

18:30 04-08-2020

Data fields

- The data in all data sources are categorized into fields such as Customer, Sales, Profit, State, etc.
- These fields are made from the columns in your data source.
- When you connect to a data source with Tableau, the fields are displayed along the left side of the workbook in the Data pane.
- The fields are what you will use to build views of your data. Each field is automatically assigned a data type (such as integer, string, and date) and a pair of data roles.



DATA PANE

- All data sources contain fields (names of columns). In Tableau, these fields appear in the Data pane.
- After you connect to your data and set up the data source with Tableau, the data source fields appear on the left side of the workbook in the Data pane



DATA WINDOW



Data	
<input checked="" type="checkbox"/>	World Indicators
Dimensions	
<input type="checkbox"/>	Date (year)
<input type="checkbox"/>	Location
<input type="checkbox"/>	Region
<input type="checkbox"/>	Subregion
<input type="checkbox"/>	Country / Region
<input type="checkbox"/>	Measure Names
Measures	
#	Deposit interest rate (%)
#	GDP (curr \$)
=#	GDP % of Total
#	GDP per capita (curr \$)
=#	GDP per capita (weighted)
#	Health exp (% GDP)
#	Health exp/cap (curr \$)
#	Lending interest rate (%)
#	Life exp (years)
#	Population (count)
=#	Rate spread (difference)
(#)	Latitude (generated)
(#)	Longitude (generated)
=#	Number of Records
#	Measure Values

Shows the Data Connection.

Dimensions are blue color pills having discrete/unique/finite Values.

When these are added to fields these become “headers”.

MEASURES are green pills having infinite/continuous Values.

When these are added to fields these become “axis”.

DATA TYPES

- All fields in a data source have a data type. The data type reflects the kind of information stored in that field.
- The data type of a field is identified in the Data pane by a particular icons.

Icon	Description
Abc	Text values
📅	Date values
🕒	Date & Time values
#	Numerical values
T F	Boolean values (relational only)
🌐	Geographic values (used with maps)



DIMENSIONS

- Dimensions typically produce headers when added to the rows or columns shelves in the view.
- By default, Tableau treats any field containing qualitative, categorical information as a dimension. This includes, for instance, any field with text or dates values.
- A dimension is a field that can be considered an independent variable and are colored blue.



MEASURES

- Measures typically produce axes when added to the rows or columns shelves.
- By default, Tableau treats any field containing numeric (quantitative) information as a measure.
- A measure is a field that is a dependent variable and are colored green.

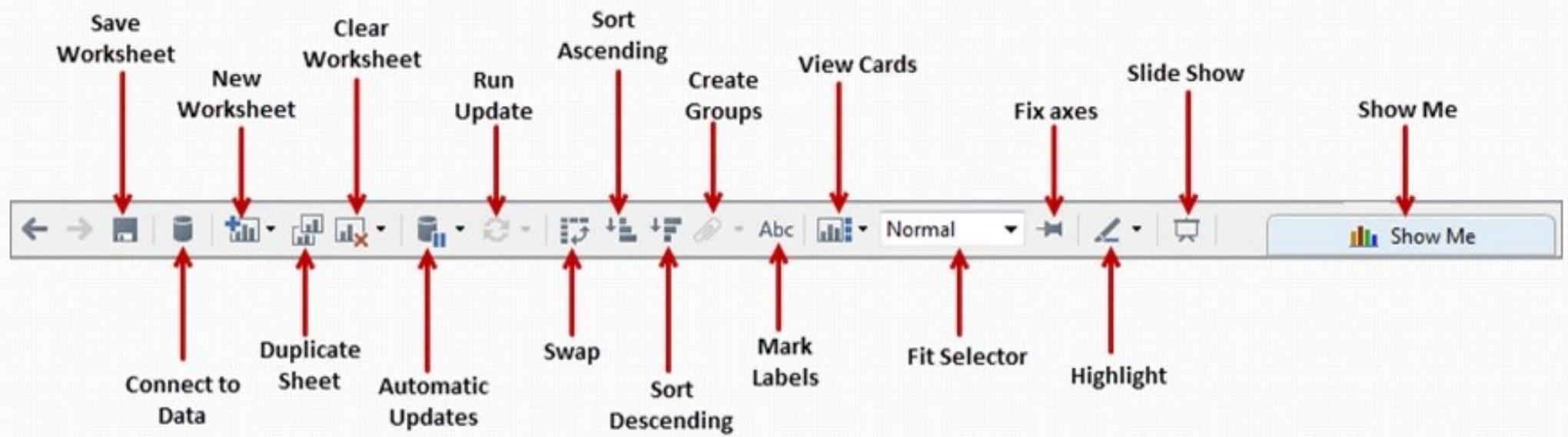


Automatic fields by tableau

- Tableau automatically adds : Number of Records, Measure Values and Measure Names and Latitude & Longitude(generated) in the fields of data source.
- Number of Records is a calculated value that sums the rows in the data source.
- Measure Names and Measure Values are special field that allows to display multiple measures on a same axis.
- Latitude(generated) & Longitude(generated) are the fields auto generated by Tableau when the data source has States, City etc.



TOOLBAR



SHOW ME



Show Me displays alternative ways to look at data.

Show Me button tells what and when the different types of charts can be used . It helps in creating complicated visualization faster and easier.

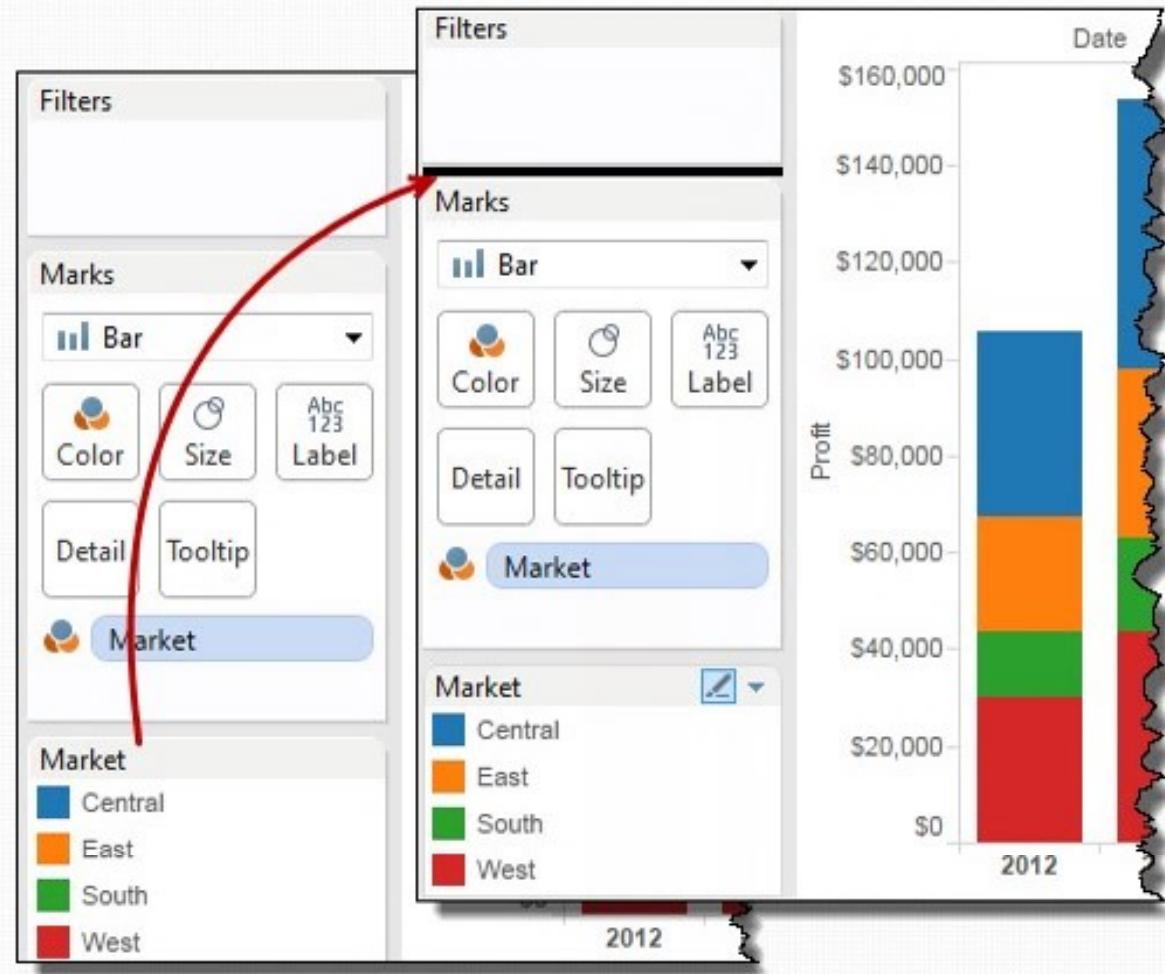
FILTERS AND MARKS

The screenshot shows the Tableau interface with the 'Filters' shelf at the top and the 'Marks' shelf below it. The 'Filters' shelf contains one item: 'MONTH(Sales ..)'. The 'Marks' shelf has several items: 'Bar' (selected), 'Color', 'Size', 'Label', 'Detail', 'Tooltip', 'MONTH(Sales ..)' (highlighted in blue), and 'SUM(Actualsal..)' (highlighted in green). A red arrow points from the text 'Filters are added for viewing or hiding specific values.' to the 'Filters' shelf. A red bracket on the right side of the 'Marks' shelf groups the 'Color', 'Size', 'Label', 'Detail', and 'Tooltip' buttons.

Filters are added for viewing or hiding specific values.

- Marks are containers for shelves, legends, and other controls.
- Marks can be shown or hidden as well as rearranged around the worksheet.

REARRANGE CARDS



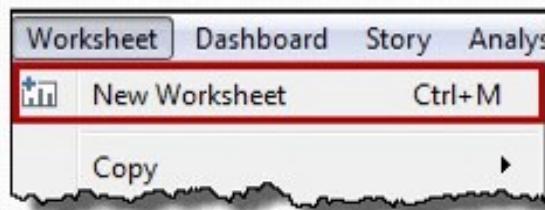
PRESENTATION MODE

- Presentation Mode hides everything on the sheet except the view and its associated legends, quick filters, and parameter controls.
- To switch in and out of Presentation Mode, click the Presentation Mode icon  on the toolbar, or on the Window menu select **Presentation Mode**.

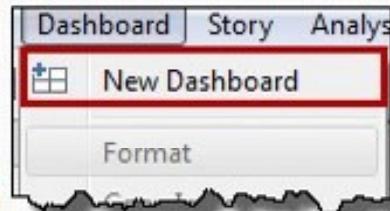


CREATE NEW SHEET

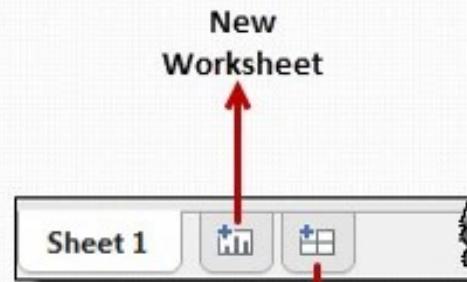
Create Worksheet



Create Dashboard



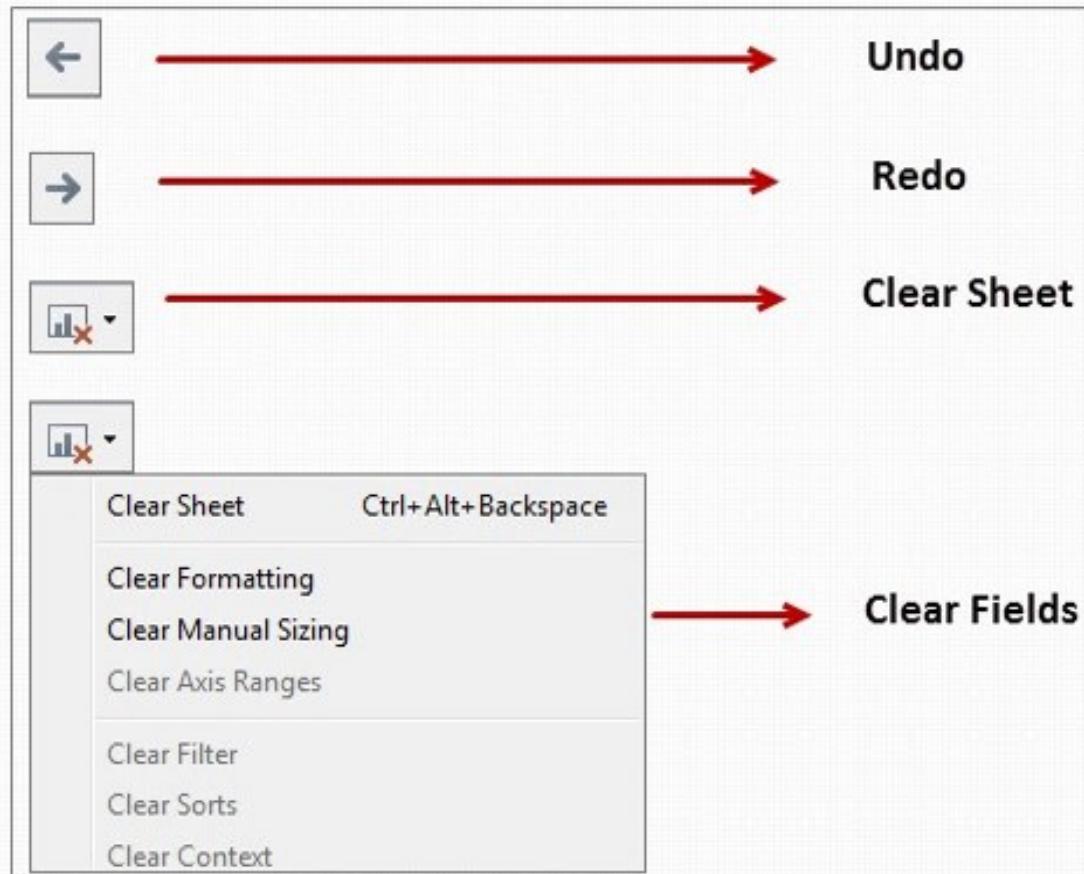
OR



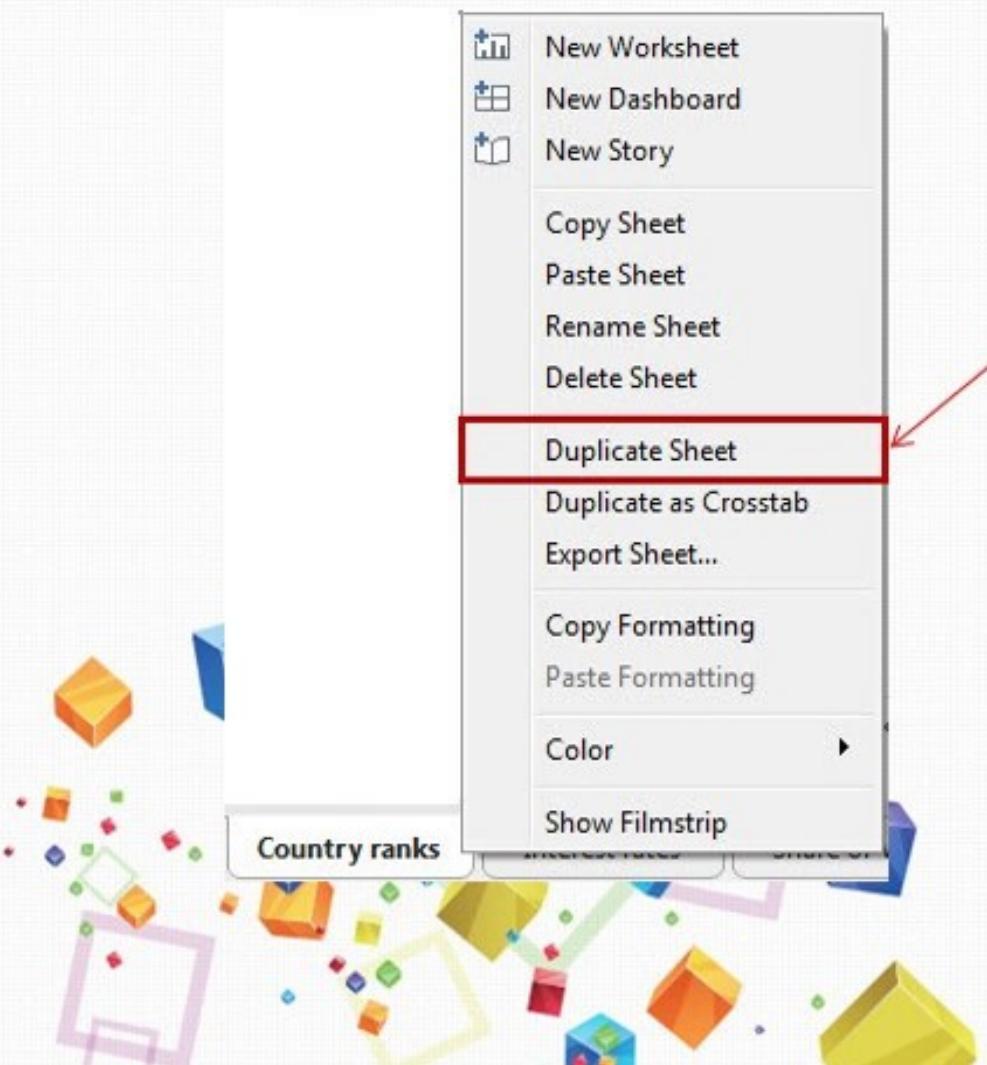
New
Worksheet

New
Dashboard

UNDO, REDO AND CLEAR SHEET

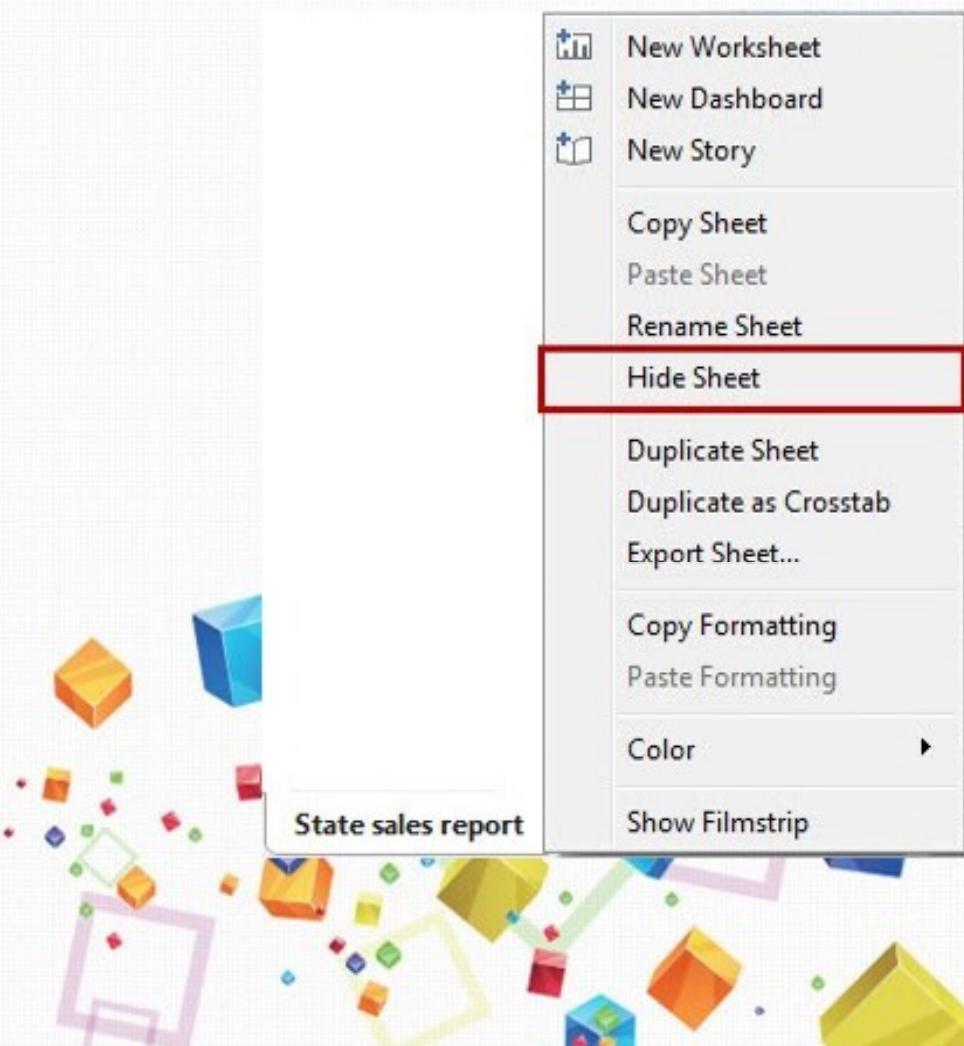


DUPLICATE SHEET



Duplicating a sheet allows you to easily make a copy of a worksheet or a dashboard.

HIDE WORKSHEET



A worksheet that is used in a dashboard cannot be deleted, but it can be hidden.

SHOW HIDDEN WORKSHEET

Navigate to the dashboard containing sheet

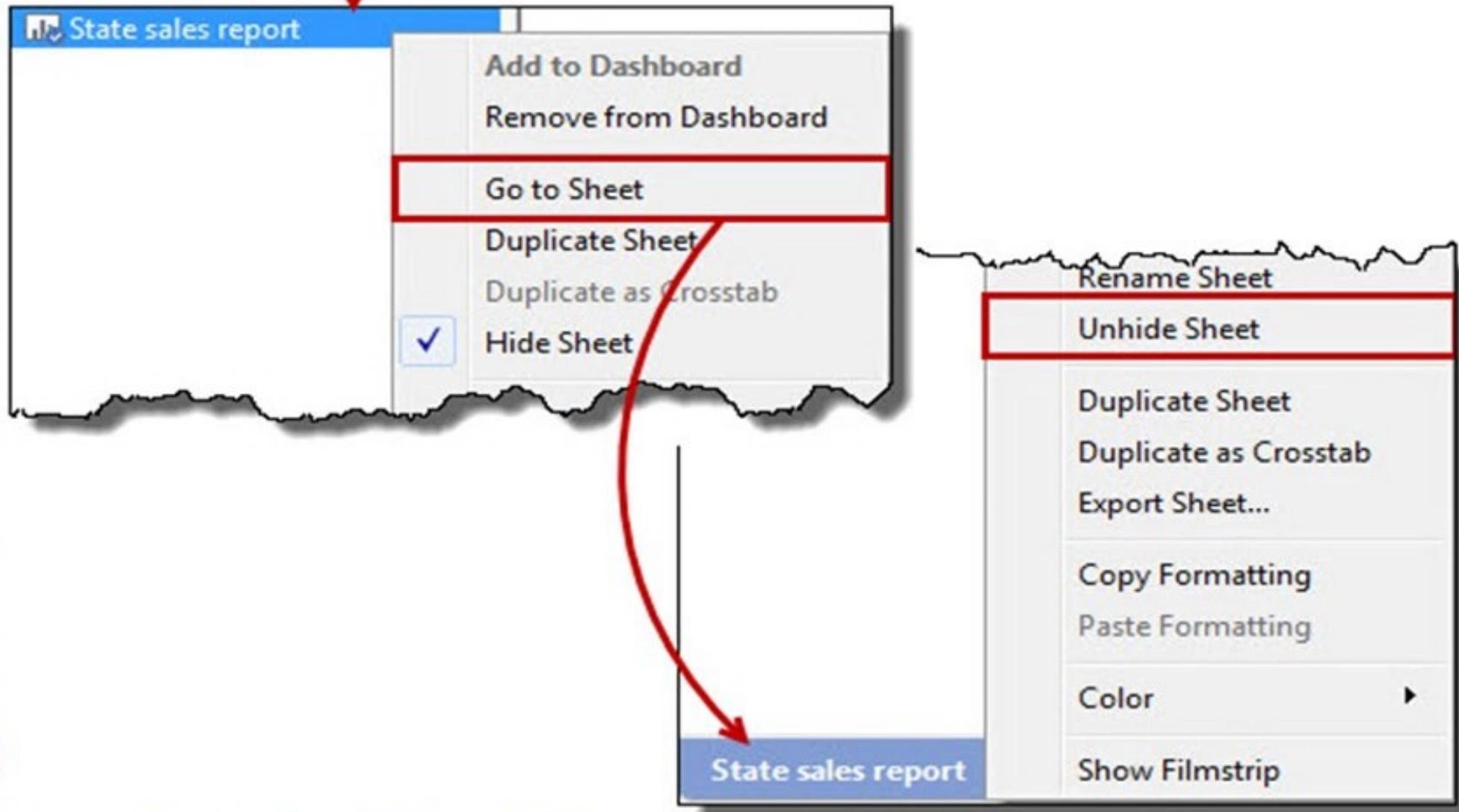


TABLEAU WORKBOOK (.twb)

- Tableau Workbook files(.twb) are the main file type created by Tableau to save your entire workbook.
- These are normally small files because the only data they contain is the metadata related to your connection and the pill placements for rendering the views and dashboards in the workbook.
- A .twb file does not contain any of the actual data from the database.



How to Create .twb files

- On the worksheet
- File> Save as – This will take you to My Tableau Repository file that Tableau automatically creates in your Document folder.
- The file is given .twb file type.

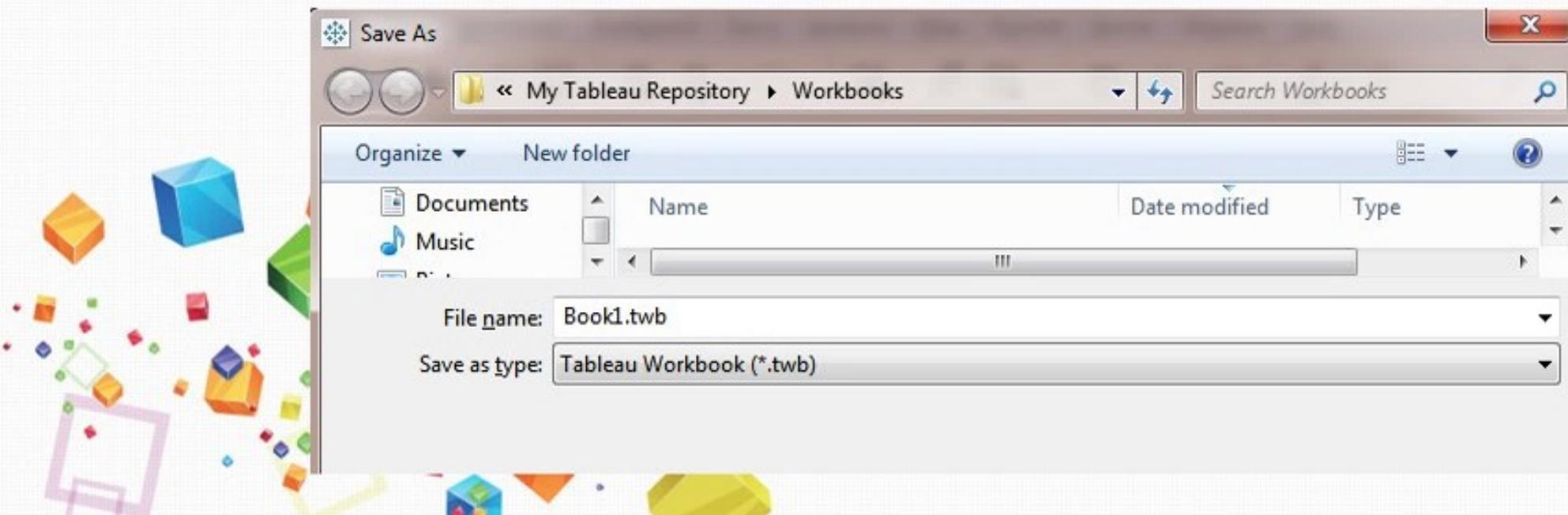
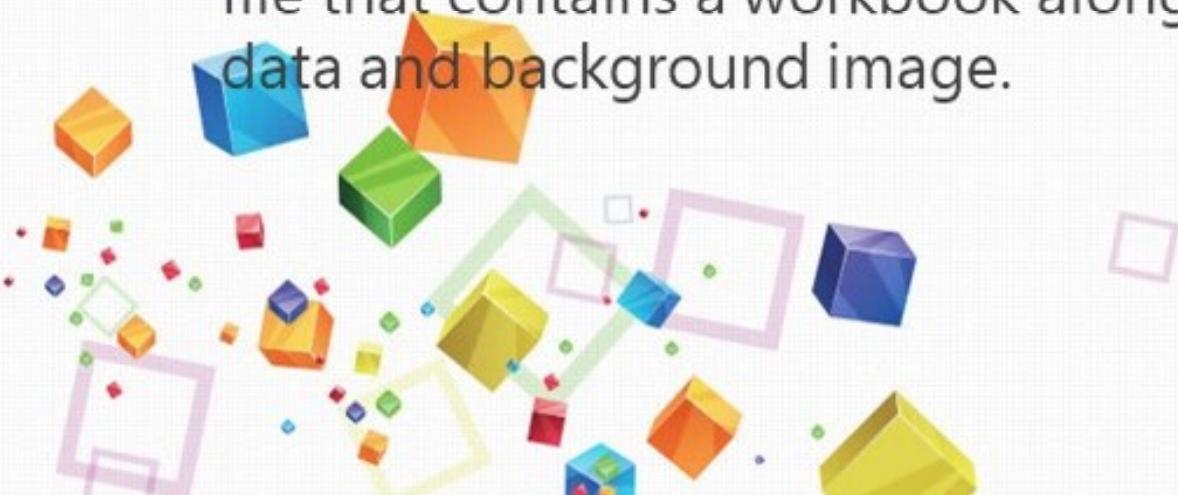


TABLEAU PACKAGED WORKBOOK (.twbx)

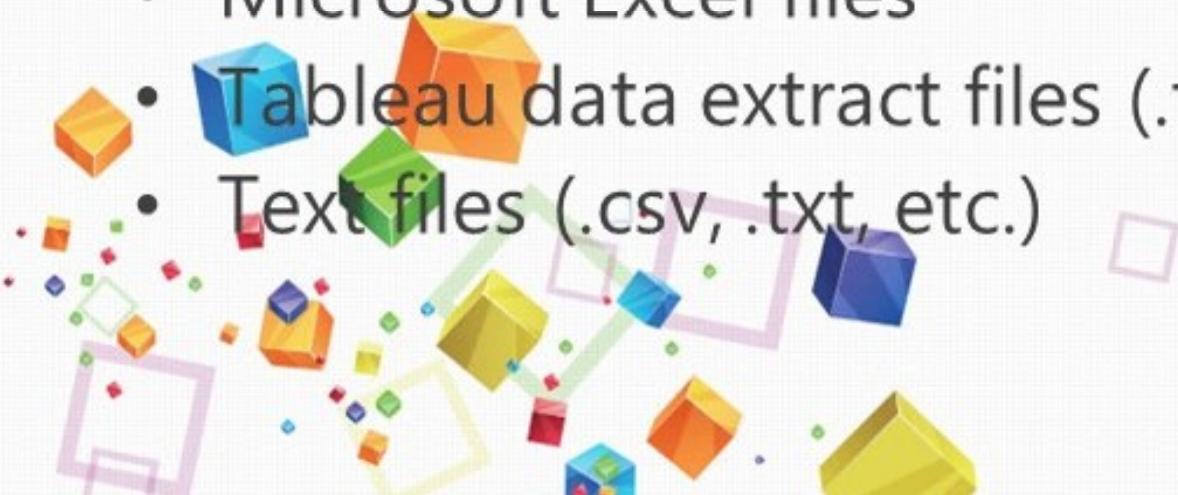
- If you want to share a workbook with someone who doesn't have access to the data source, then it can be done by packaged workbook.
- People without a license to Tableau Server or Tableau Desktop can also access .twbx file using Tableau Reader.
- Packaged Workbook bundle the data and metadata into a single zip file that contains a workbook along with any supporting local file data and background image.



FILES IN PACKAGED WORKBOOK (.twbx)

The following files are included in packaged workbooks:

- Background images
- Custom geocoding
- Custom shapes
- Local cube files
- Microsoft Access files
- Microsoft Excel files
- Tableau data extract files (.tde)
- Text files (.csv, .txt, etc.)



How to Create .twbx file

- Select **File > Save As**.
- Specify a file name for the packaged workbook in the Save As dialog box.
- Select **Tableau Packaged Workbooks** on the **Save as type** drop-down list.

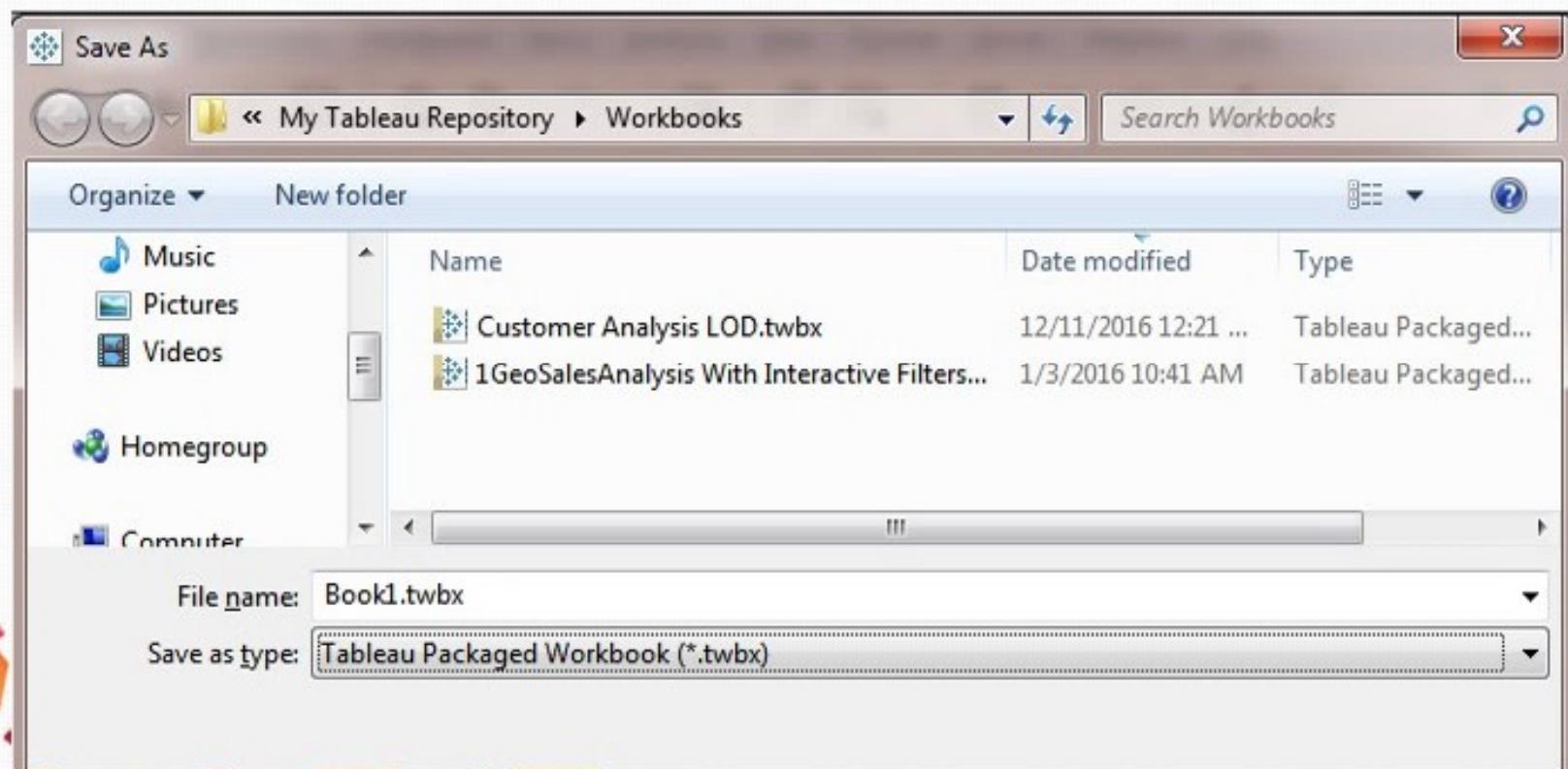


TABLEAU BOOKMARK FILES (.tbm)

- If you have a massive workbook (with many worksheets) and you want to share one worksheet then this can be done by using Tableau bookmark file (.tbm).
- A .tbm file saves the data and metadata related to a worksheet within your workbook- including the connection and calculated fields.



How to Create .tbm

- **To save a Tableau bookmark:**
- Select **Window > Bookmark > Create Bookmark.**
- Specify the bookmark file name and location in the Create Bookmark dialog box.
- Tableau saves the file with a .tbm extension. The default location is the Bookmarks folder in the Tableau Repository. However, you can save bookmarks to any location you choose. Bookmarks that are not stored in the Tableau repository do not appear on the **Bookmark** menu.





Data

Analytics

Orders+ (Sample - Sup...)

Dimensions

- ABC Category
- City
- Country
- ABC Customer ID

Pages Columns
Rows

Filters Sheet 1
Order ID
CA-2011-100006 ABC

Presentation Mode F7

- Show Toolbar
- Show Status Bar
- Show Side By S

Bookmark

- Sheet 1

Standard



Create Bookmark...

Create Bookmark



<< My Tableau Repository >> Bookmarks

Search Bookmarks

Organize ▾

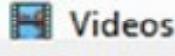
New folder



Music



Pictures



Videos

Name

Date modified

Type

File name: Sheet 1.tbm

Save as type: Tableau Bookmark (*.t bm)

Tableau Data Extract (.tde)

- Tableau data extract files have the .tde file extension. Extract files are a local copy of a subset or entire data that you can use to share data, work offline, and improve database performance.

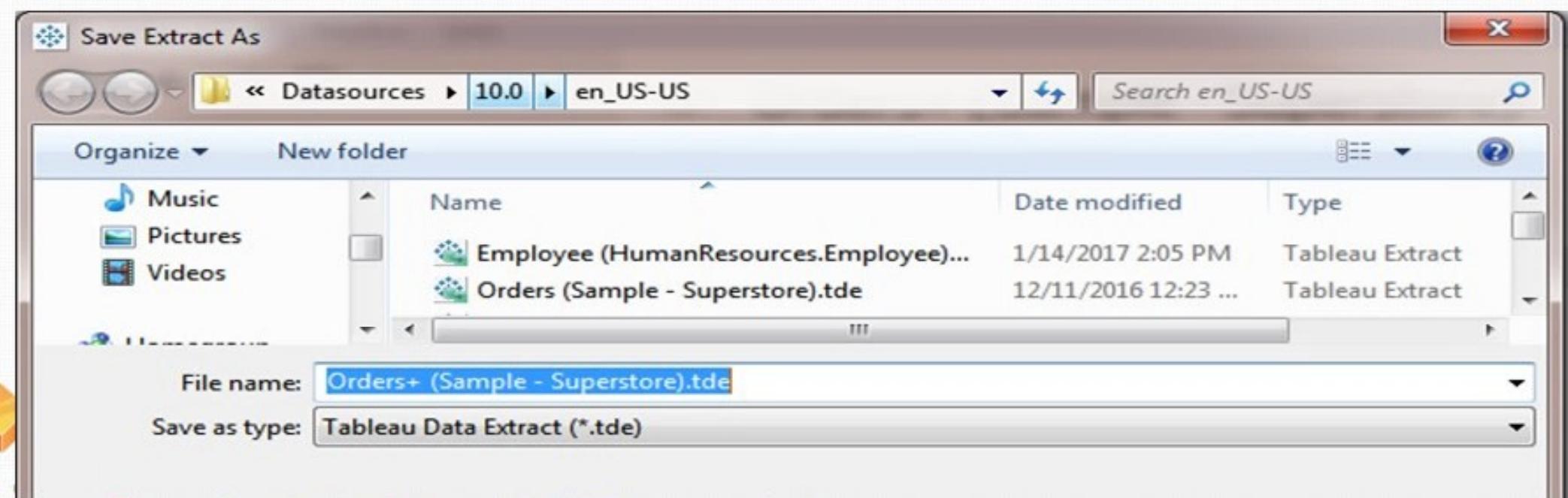


How to Create a .tde file

Orders+ (Sample - Superstore)

Connection
 Live Extract | Edit
Extract will include all data.

Orders  Returns



Edit your .tde file

Connection

Live Extract | Edit Refresh

Extract will include all data.

File
O

Extract Data



Specify how much data to extract:

Filters (optional)

Filter	Details

Add...

Edit...

Remove

Aggregation

Aggregate data for visible dimensions

Roll up dates to Year

Number of Rows

All rows

Incremental refresh

Top:

rows

History...

Hide All Unused Fields

OK

Cancel

Tableau Data Source (.tds)

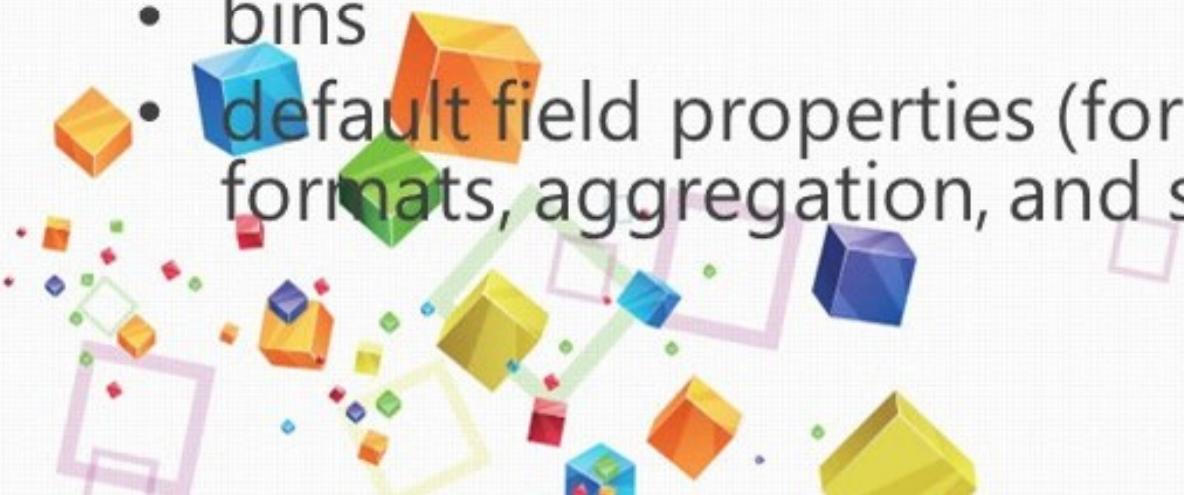
- Data source files are shortcuts for quickly connecting to the original data that you use often.
- Data source files do not contain the actual data but rather the information necessary to connect to the actual data as well as any modifications you've made on top of the actual data such as changing default properties, creating calculated fields, adding groups, and so on.



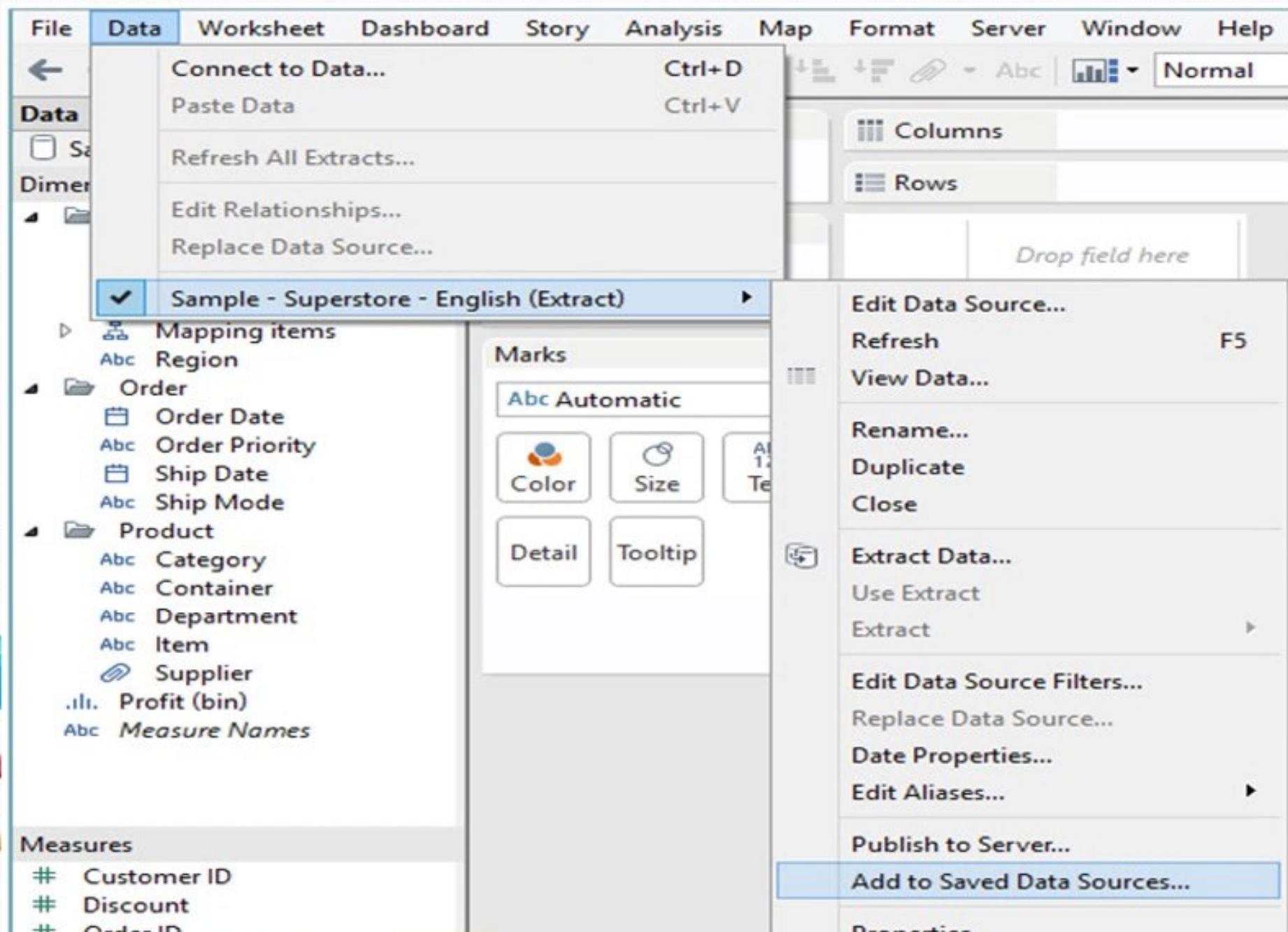
Files included in .tds file

Data source files contain the following types of information:

- data source type
- data source connection information specified in the data source page (for example, server, port, location of local files, and tables)
- groups
- sets
- calculated fields
- bins
- default field properties (for example, number formats, aggregation, and sort order)



How to Create .tds file



The screenshot shows the Tableau interface with the 'Data' tab selected in the top navigation bar. A context menu is open over a data source named 'Sample - Superstore - English (Extract)'. The menu items are:

- Edit Data Source...
- Refresh F5
- View Data...
- Rename...
- Duplicate
- Close**
- Extract Data...
- Use Extract
- Extract >
- Edit Data Source Filters...
- Replace Data Source...
- Date Properties...
- Edit Aliases... >
- Publish to Server...
- Add to Saved Data Sources...**
- Properties

The 'Add to Saved Data Sources...' option is highlighted with a blue selection bar at the bottom of the menu.

Tableau Packaged Data Source (.tdsx)

- A packaged data source is a zip file that contains the data source file (.tds) as well as any local file data such as Extract files (.tde), text files, Excel files, Access files, and local cube files.
- Use this format to create a single zip file that you can then share with others who may not have access to the original data stored locally on your computer.



How to Create .tdsx File

The screenshot shows the Tableau desktop interface with a data source context menu open over a Superstore extract.

File **Data** Worksheet Dashboard Story Analysis Map Format Server Window Help

Data **Sample - Superstore - English (Extract)**

- Connect to Data... Ctrl+D
- Paste Data Ctrl+V
- Refresh All Extracts...
- Edit Relationships...
- Replace Data Source...

Sample - Superstore - English (Extract)

- Mapping items
 - Region
 - Order
 - Order Date
 - Order Priority
 - Ship Date
 - Ship Mode
 - Product
 - Category
 - Container
 - Department
 - Item
 - Supplier
 - Profit (bin)
 - Measure Names

Marks

- Automatic
 - Color
 - Size
 - Detail
 - Tooltip

Add to Saved Data Sources...

Add to Saved Data Sources...

« Datasources > 10.0 > en_US-US

Search en_US-US

Organize New folder

Name	Date modified	Type
Music		
Pictures		
Videos		

No items match your search.

File name: Orders+ (Sample - Superstore).tdsx

Save as type: Tableau Packaged Data Source (*.tdsx)