TABLEAU

A Business Intelligence tool

Tableau

Tableau is a visual analytical tool to present the large complex data into the readable & understandable format.

These days it is widely used by most of the business sectors as it provide great quality with ease.

Tableau can connect to 50+ data sources and gives us 24 types of charts.

Why Tableau?

- Speed
- User Friendly
- Eye-catching and Interactive Dashboards
- Direct Connection
- Easy Publishing and Sharing
- Growing Market

Installing Tableau

(14 Days Free Trial)

- Go to Tableau.com

- Click on Try Now

- Enter your Email id

- Click on Download free trail

- Double click the downloaded file to install it.

- Fill the registration form and get started.

- https://public.tableau.com/en-us/s/download

Tableau - Book1

File Data Server Help

Connect

To a File

Excel

Text file

Access

JSON file

PDF file

Spatial file

Statistical file

More...

To a Server

Tableau Server

Microsoft SQL Server

MySQL

Oracle

Amazon Redshift

More...

Saved Data Sources

Sample - Superstore

World Indicators

Open

Open a Workbook

Sample Workbooks
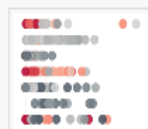
More Samples

Superstore

Regional
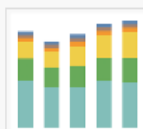
World Indicators

Discover

Training

Getting Started

Connecting to Data

Visual Analytics

Understanding Tableau

More training videos...

Viz of the Week

Pedigree Of The Teams Qualified For World Cup 2018

Resources

Blog - Singapore's next generation of data talent

Tableau Conference - Register Now

Forums

Type here to search

11:53 PM
12/15/2017

Tableau

There are three basic steps involved in creating any Tableau report.

- **Connect to a data source** – It involves locating the data and using an appropriate type of connection to read the data.

- **Choose dimensions and measures** – This involves selecting the required columns from the source data for analysis.

- **Apply visualization technique** – This involves applying required visualization methods, such as a specific chart or graph type to the data being analyzed.

Tableau

The Sample Data: Tableau trial version comes with a sample data base 'Sample – Superstore.xls'. We can access this database at the below location:

\Documents\ Documents\My Tableau Repository\Datasources\10.4\en_US-US\ Sample – Superstore.xls

Tableau & Excel a Comparison

In excel we summarise the data using pivot table. The similar functionality is provided in tableau in more comfortable manner.

For Example let try to retrieve the category wise product sales from Sample – Superstore database.

•Using Excel

•Using Tableau

Live and Extract Connection

Tableau provides two types of connections:

1. Live Connection

Data | Analytics

Sheet1 (AgentData)

2. Extract
(A saved subset of a data source)

Data | Analytics

Sheet1 (AgentData)

Tableau Data Types

There are 6 data types in Tableau:

1. Number (#)
2. String / Text (ABC)
3. Date (📅)
4. Geographic (🌐)
5. Boolean (True / False)
6. DATE & TIME

View Data

To view the data source data we need to click on view data button. Alternatively we can drag and drop the sheet in Sheet Area

View Data

To view the specific number of records we can specify the number in row count box.

View Data

To hide a particular column we need to click on the column and select hide.
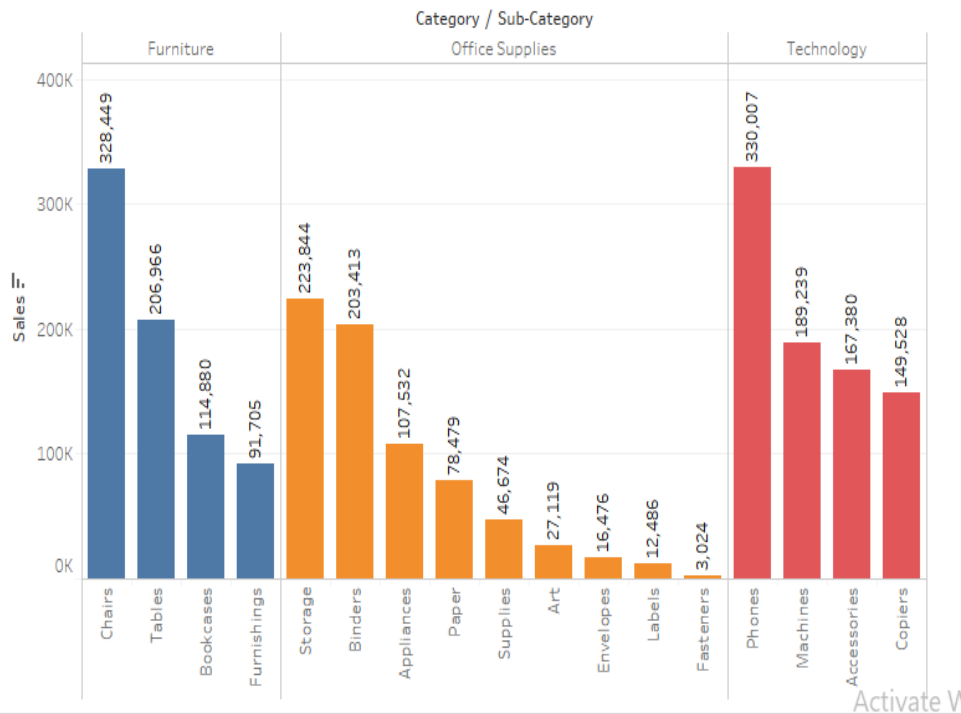
A-1 create a Graph display category & subcategory wise sales
A-2 Category, Region & Sub-Category wise Profit

Category / Sub-Category

| | | 328,449 | 206,966 | 114,880 | 91,705 | 223,844 | 203,413 | 107,532 | 78,479 | 46,674 | 27,119 | 16,476 | 12,486 | 3,024 | 330,007 | 189,239 | 167,380 | 149,528 |

		Region			
Category	Sub-Catego..	Central	East	South	West
Furniture	Bookcases	-1,998	-1,168	1,339	-1,647
	Chairs	6,593	9,358	6,612	4,028
	Furnishings	-3,906	5,881	3,443	7,641
	Tables	-3,560	-11,025	-4,623	1,483
Office Supplies	Appliances	-2,639	8,391	4,124	8,261
	Art	1,195	1,900	1,059	2,374
	Binders	-1,044	11,268	3,901	16,097
	Envelopes	1,778	1,812	1,465	1,909
	Fasteners	237	264	174	275
	Labels	1,073	1,129	1,041	2,303
	Paper	6,972	9,015	5,947	12,119
	Storage	1,970	8,389	2,274	8,645
	Supplies	-662	-1,155	2	626
Technology	Accessories	7,252	11,196	7,005	16,485
	Copiers	15,609	17,023	3,659	19,327
	Machines	-1,486	6,929	-1,439	-619
	Phones	12,323	12,315	10,767	9,111

Column Formatting

Rename – Double Click on the column and edit the name.
Copy – Select the column / Row copy and paste it in Excel
Split – Split the Column as per spaces.

Sorting Columns

By default the order of the fields we get in Tableau is same as it is in the data source. These fields can be sorted using the sort filed option.

Sorting Rows/Data

To arrange the data in ascending or descending order we need to click on small icon with the field name
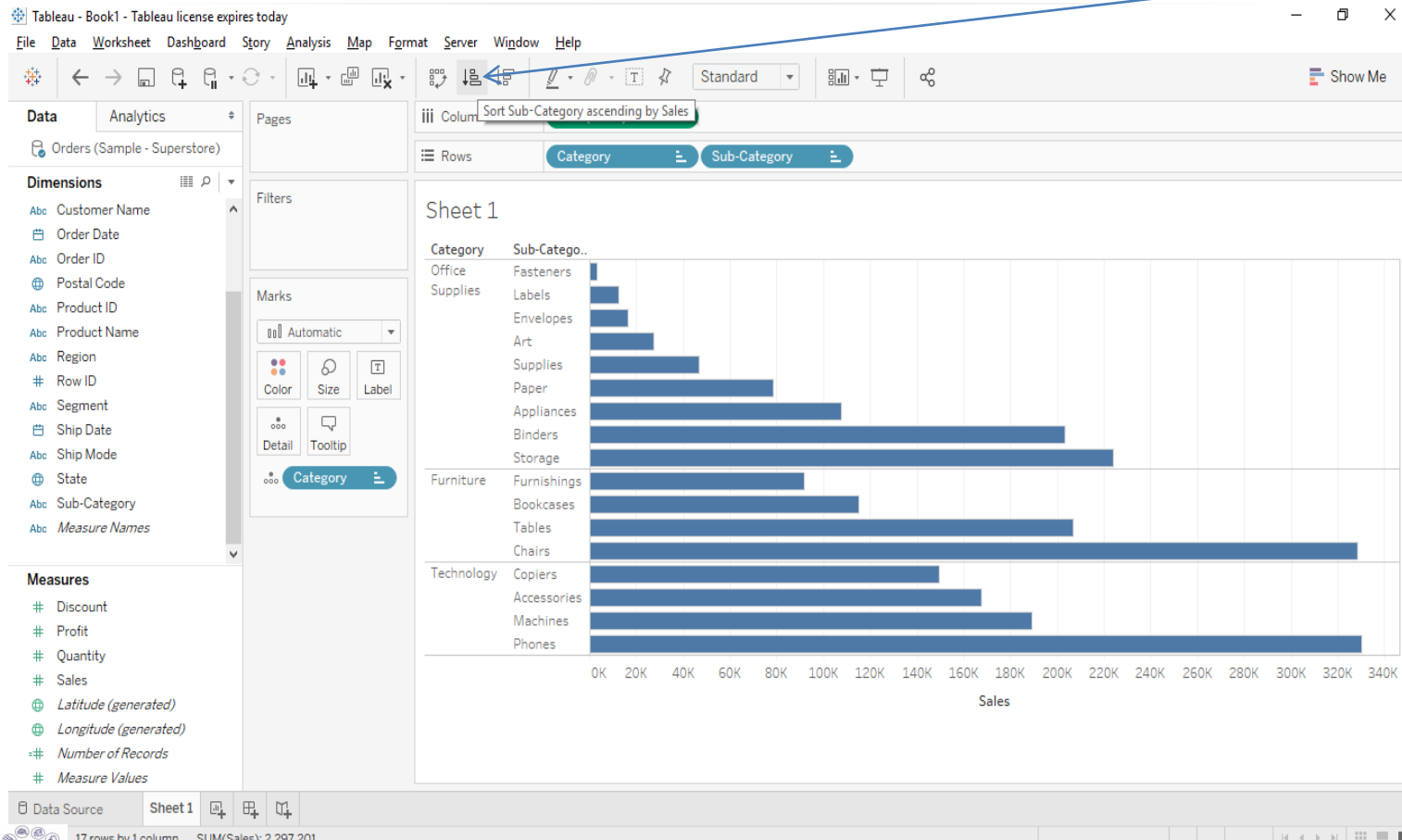
Sorting Rows/Data

Quick Sort : The quick sort button enables us to sort the graph in ascending or descending order.
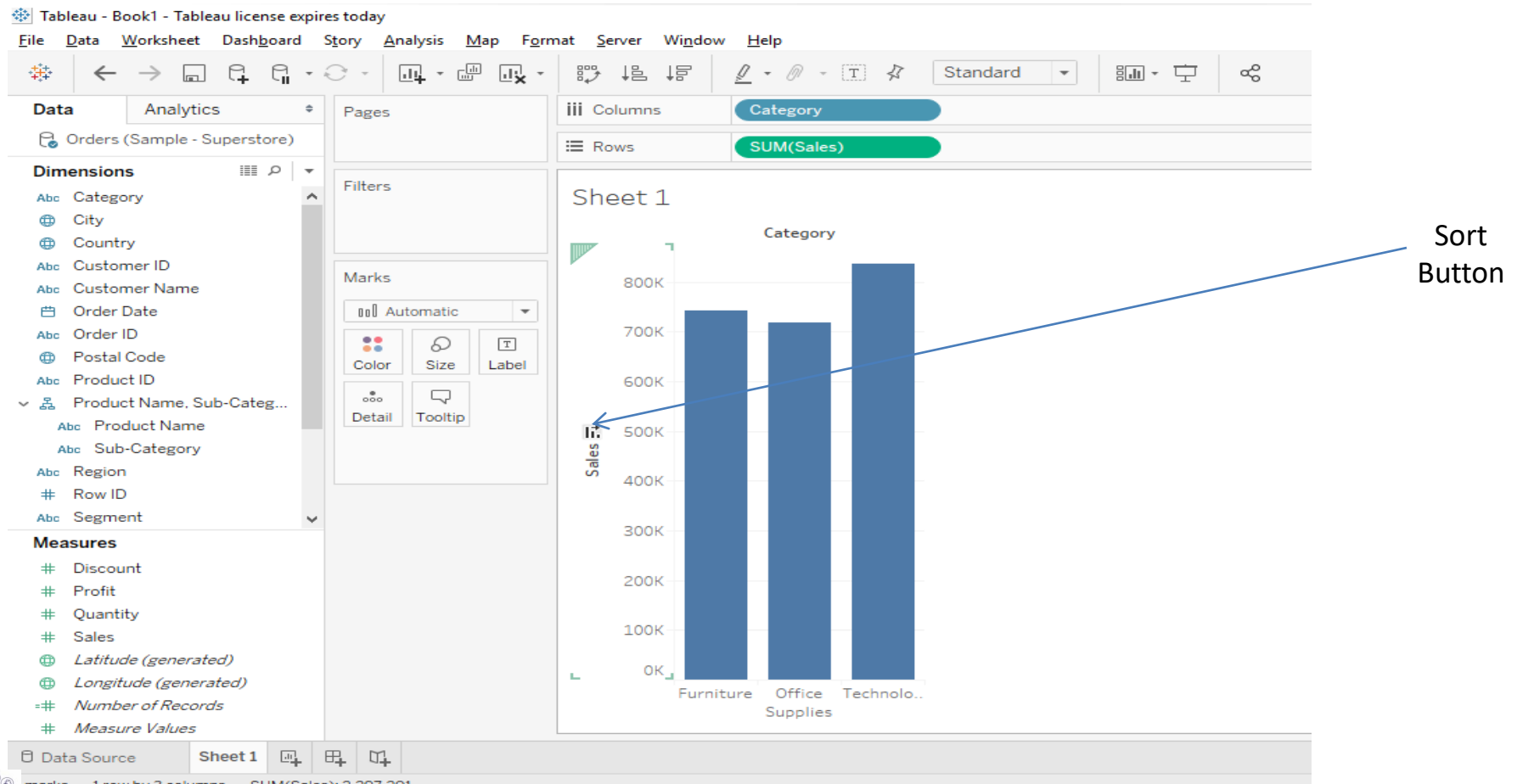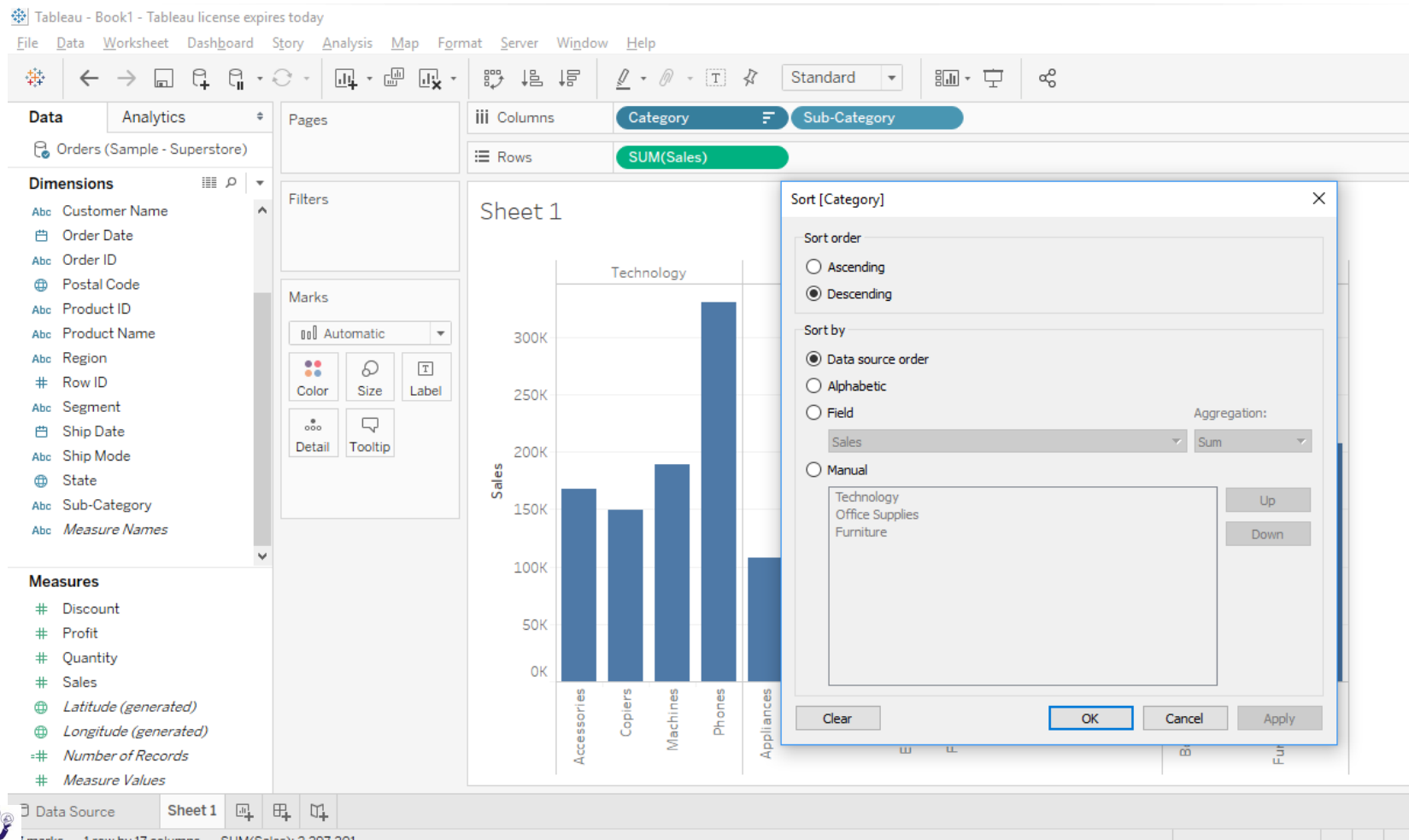
Sorting Rows/Data

Toolbar Sort : To sort through toolbar we need to select the respective pill and click on the sort button.
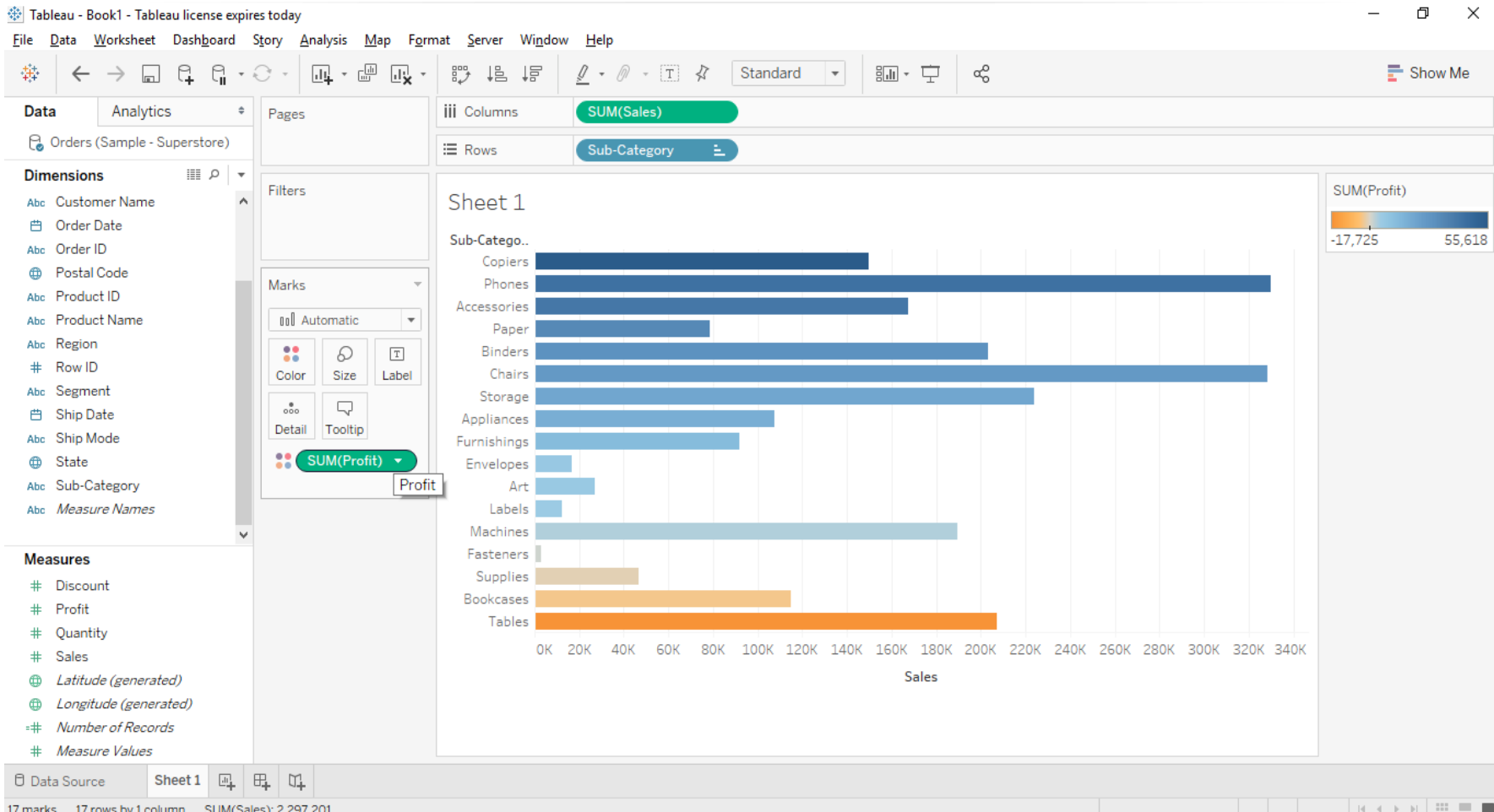
Sort Buttons

Sorting Rows/Data

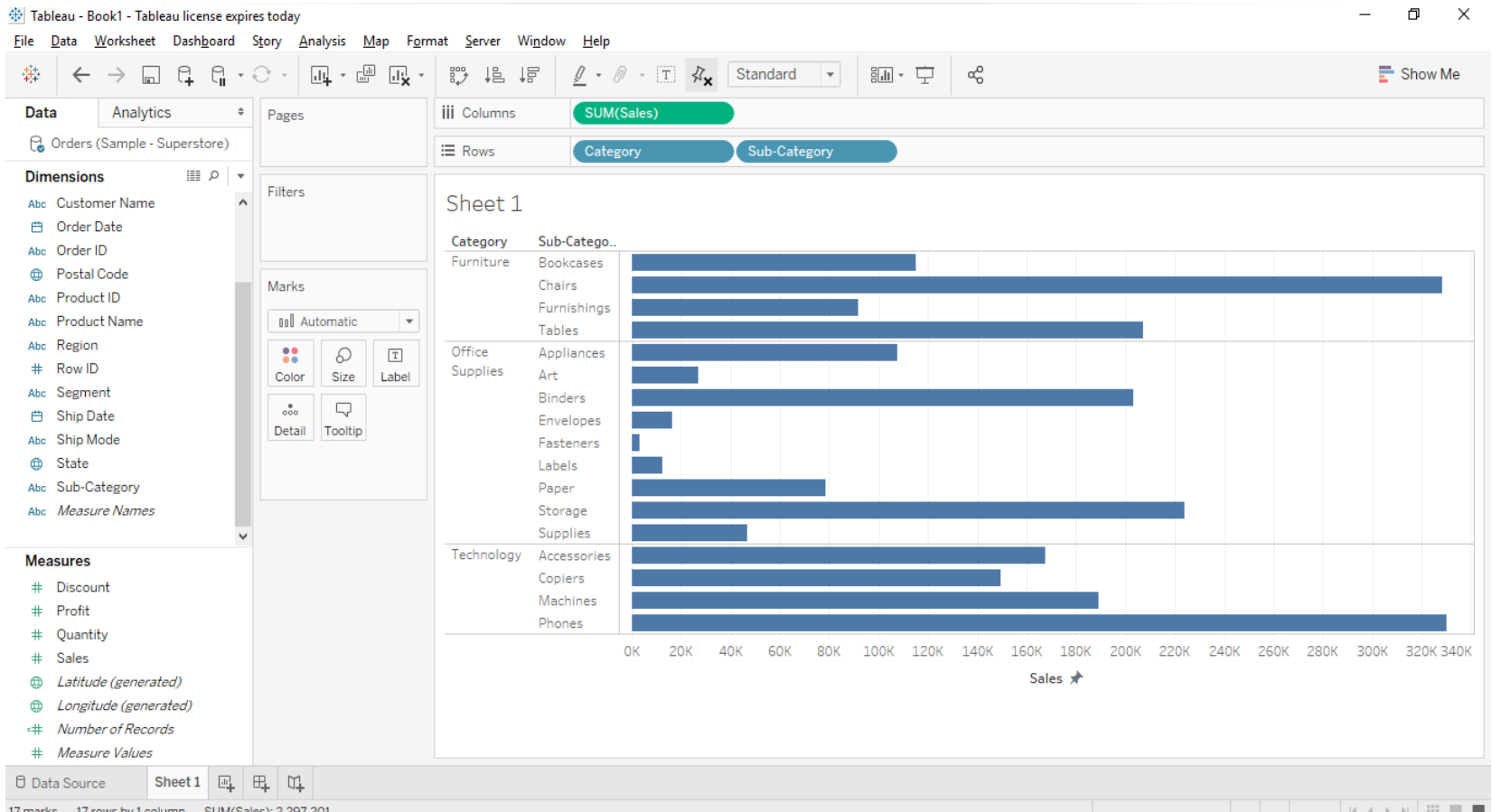Sorting By Pills : This gives us few advance options.

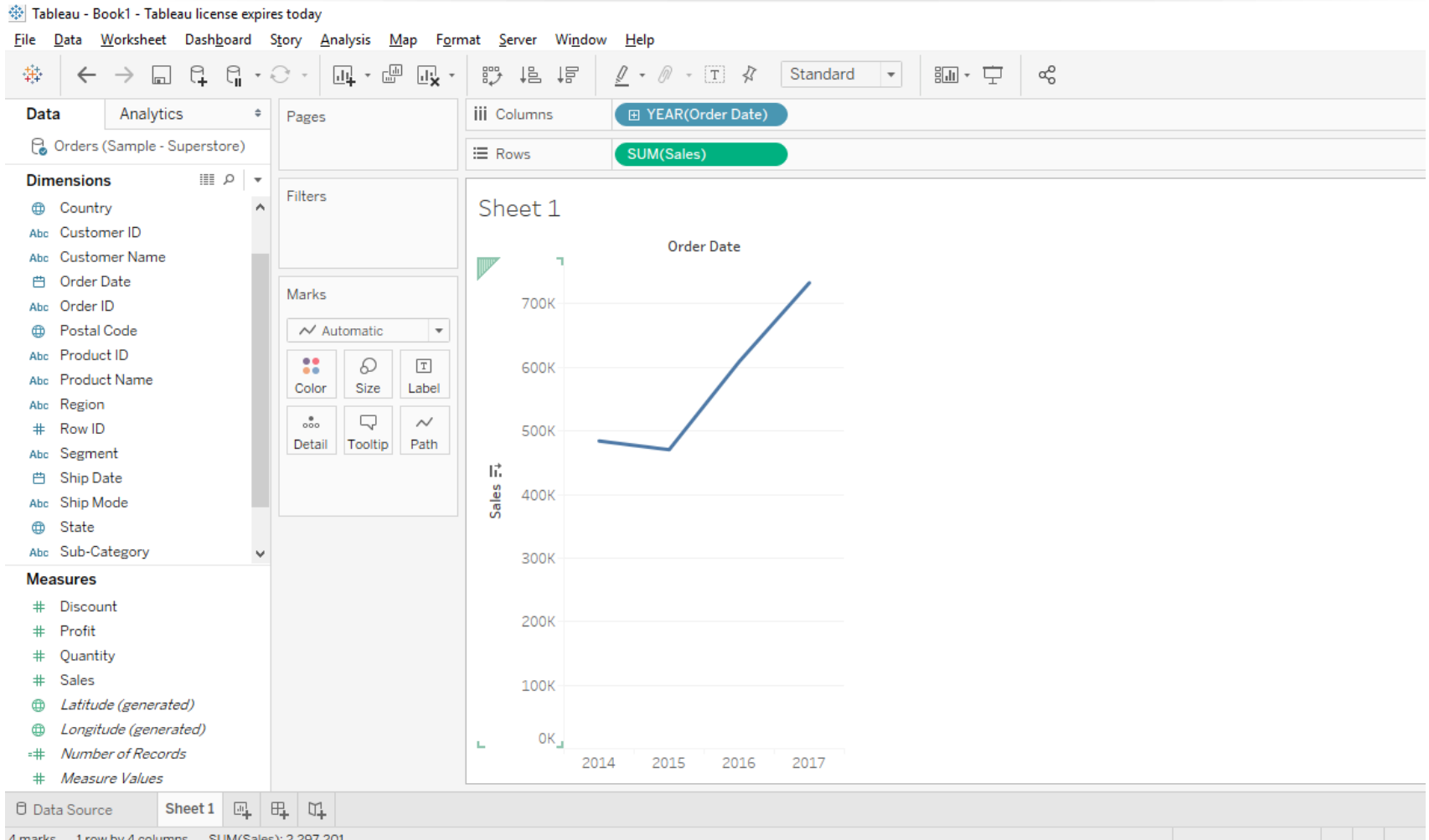# Sorting Rows/Data

Sorting By Marks Card

Creating Hirearchies

We can create the hierarchy of fields by dropping one filed into another.
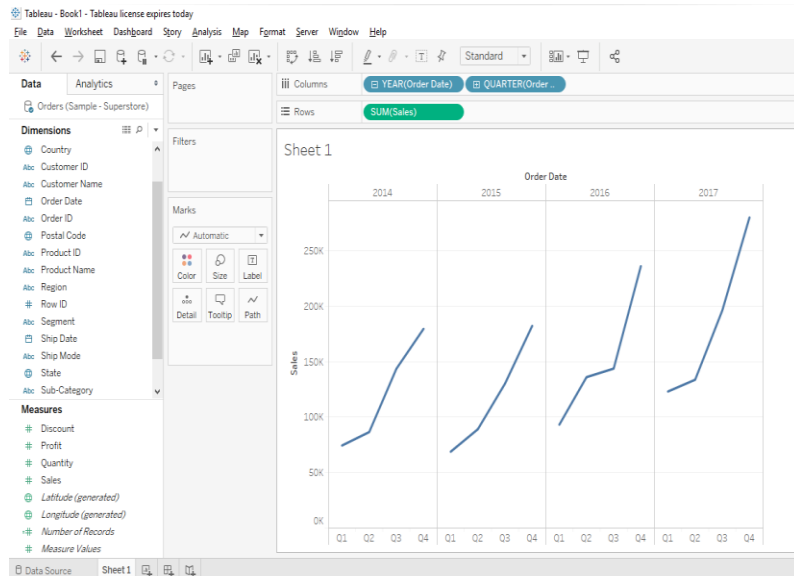
Auto Hirearchies

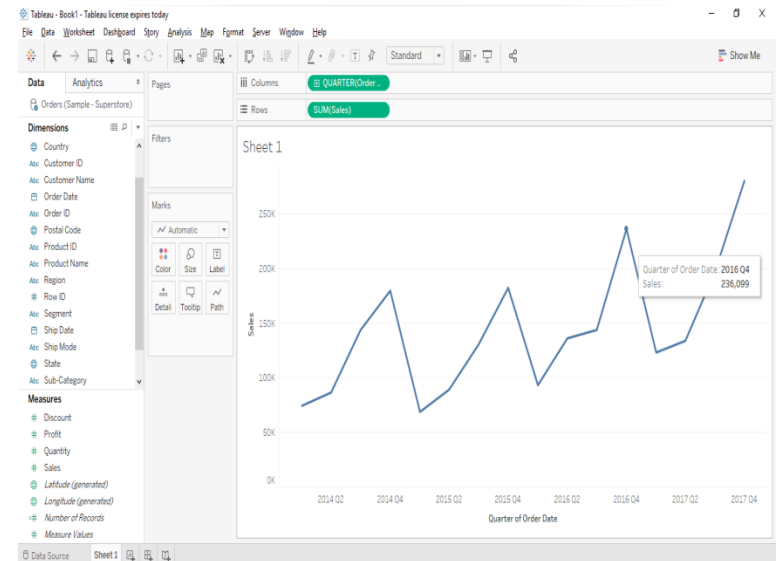Tableau create the auto hierarchy for date fields

Auto Hirearchies

Auto hierarchy can be displayed using
1. Discrete
2. Continuous Graphs

Discrete Graph

Continuous Graph

To remove the hierarchy Right chick on the hierarchy and select Remove hierarchy