

Introduction To **TABLEAU**

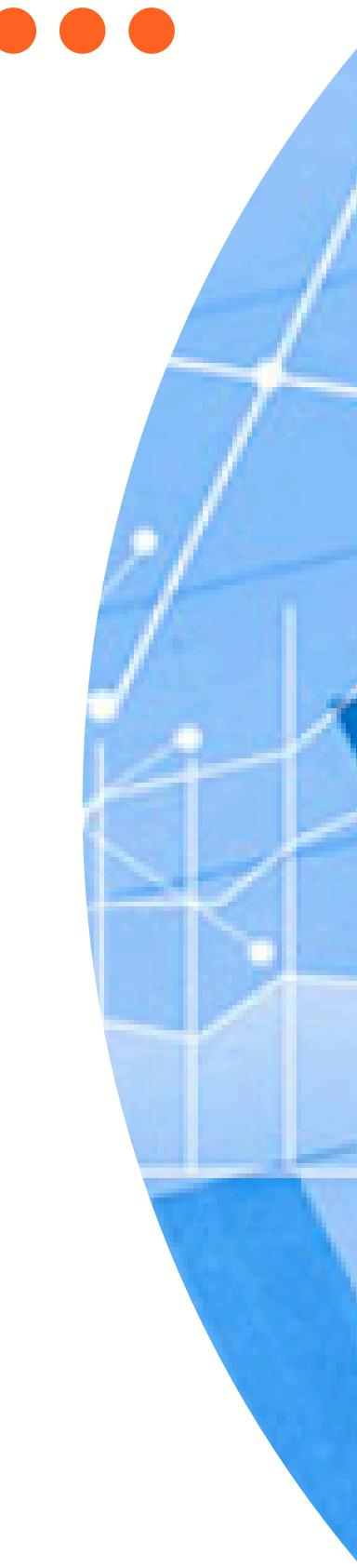
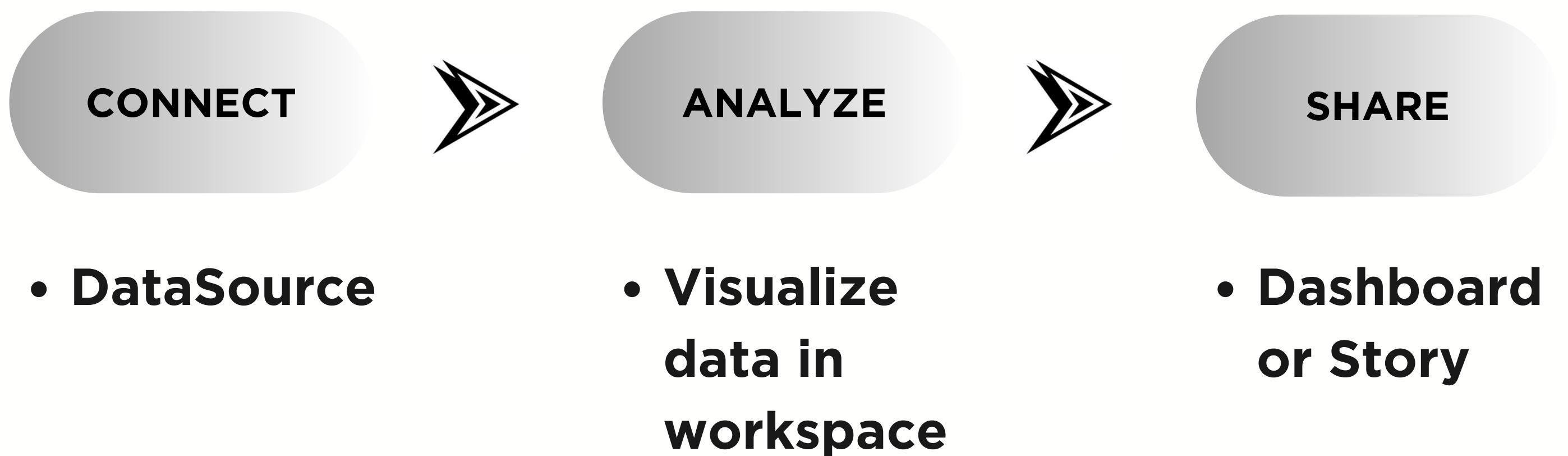
Your Guide To Data Driven Insights

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 - 9

Tableau Workflow



Connect



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- 9

File Data Server Help

Connect

Search for Data

Tableau Server

To a File

- Microsoft Excel
- Text file
- JSON file
- Microsoft Access
- PDF file
- Spatial file
- Statistical file
- More...

To a Server

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

Saved Data Sources

- Sample - Superstore
- World Indicators

Open

- Book1-Tableau
- Book1
- Salesforce%20Sales%20Pipeline

Quick Start

Accelerators

Jumpstart your analysis with pre-built templates [View More](#)

- Salesforce Sales Cloud ...
- Budget Controlling
- Retail Sales

Sample Workbooks

Explore what Tableau can do

Discover

[Open a Workbook](#)

[Meet Tableau](#)

[Get Started](#)

[Tour the Tableau Environment](#)

[Connect to and Prepare Data](#)

[Learn more...](#)

[Resources](#)

[Get Tableau Prep](#)

[Tableau Blueprint Assessment](#)

[Tableau Community Forums](#)

[Tableau Accelerators](#)

[Blog - Read latest post](#)

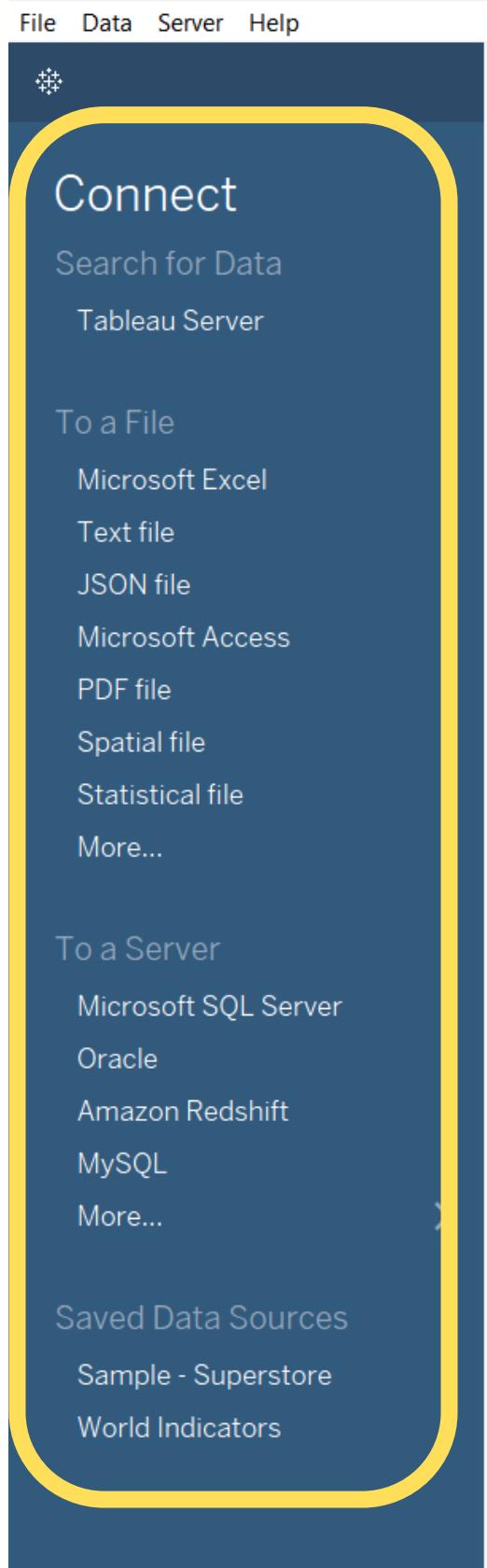
Tableau 2024.3 available now

See, understand, and act on your data with Tableau 2024.3

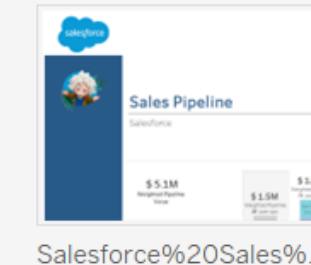
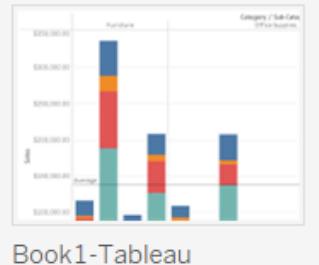
[Explore Now →](#)

Connect

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Open

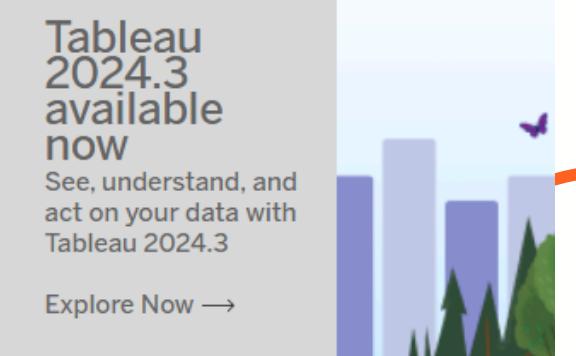


[Open a Workbook](#)

Discover

- ➊ Meet Tableau
- ➋ Get Started
- ➌ Tour the Tableau Environment
- ➍ Connect to and Prepare Data
- ➎ Learn more...

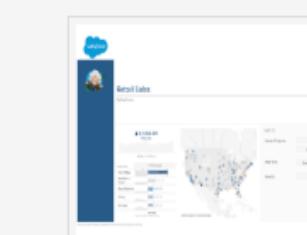
- ➏ Resources
 - ➐ Get Tableau Prep
 - ➑ Tableau Blueprint Assessment
 - ➒ Tableau Community Forums
 - ➓ Tableau Accelerators
 - ➔ Blog - Read latest post



Quick Start

Accelerators

Jumpstart your analysis with pre-built templates [View More](#)



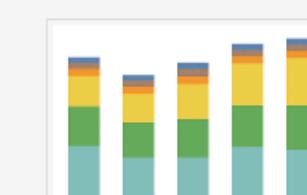
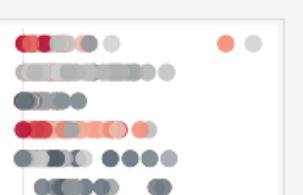
Salesforce Sales Cloud ...

Budget Controlling

Retail Sales

Sample Workbooks

Explore what Tableau can do



Data Source Types

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9

Spreadsheets

- Excel or CSV files

Relational Databases

- MYSQL or Oracle

Cloud Data

- AWS or Microsoft Azure

Other Sources

- Spatial files or R

Connect

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- 2
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The screenshot shows the Tableau desktop interface. On the left, the 'Connect' menu is open, listing various data sources. The 'Text file' option under 'To a File' is highlighted with a yellow oval. The central workspace displays a large text overlay: 'We can connect to the csv files.' Below this, there's a 'Quick Start' section with 'Accelerators' and sample workbooks like 'Salesforce Sales Cloud', 'Budget Controlling', and 'Retail Sales'. The right side of the screen features a 'Discover' sidebar with links to 'Meet Tableau', 'Get Started', 'Tour the Tableau Environment', 'Connect to and Prepare Data', 'Learn more...', 'Resources', 'Get Tableau Prep', 'Tableau Blueprint Assessment', 'Tableau Community Forums', 'Tableau Accelerators', and 'Blog - Read latest post'. A prominent banner at the bottom right announces 'Tableau 2024.3 available now'.

File Data Server Help

Connect

Search for Data

Tableau Server

To a File

Microsoft Excel

Text file

JSON file

Microsoft Access

PDF file

Spatial file

Statistical file

More...

To a Server

Microsoft SQL Server

Oracle

Amazon Redshift

MySQL

More... >

Saved Data Sources

Sample - Superstore

World Indicators

Open

Open a Workbook

Discover

We can connect to the csv files.

Quick Start

Accelerators

Jumpstart your analysis with pre-built templates [View More](#)

Salesforce Sales Cloud ...

Budget Controlling

Retail Sales

Sample Workbooks

Explore what Tableau can do

Tableau 2024.3 available now

See, understand, and act on your data with Tableau 2024.3

Explore Now →

Data Field

The screenshot shows the Tableau Data pane. At the top, it says "Data" and "Analytics". Below that is a search bar and a "Tables" section. Under "Tables", there is a list of fields from the "Orders" table, grouped by category. A blue box highlights the dimension fields: "Customer Name", "Location", "Order Date", "Order ID", "Product", "Profit (bin)", "Segment", "Ship Date", and "Ship Mode". A green box highlights the measure fields: "# Discount", "# Profit", "# Quantity", "# Sales", and "# Orders (Count)". On the far left, there is a vertical column of numbered circles from 1 to 9.

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- **Dimensions**
 - Break down the aggregated total into smaller totals by category.
- **Measures**
 - By default, aggregated by SUM
 - Can be aggregated as average, median, count, or count distinct.

Data Field

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A field, also known as a column, is a single piece of information from a record in a data set.

- Qualitative Field (**Dimensions**)

- Describes or Categorizes Data
- What, when or who
- Slices the quantitative data

- Quantitative Field (**Measures**)

- Numerical Data
- Provides measurement for qualitative category
- Can be used in calculations

Data Types

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 Abc Text or String Values

 Discrete Date/Time

 Discrete Date

 Geographic field -
State or Zip Code



Continuous
Numeric Value



Calculated Field

Chart Types

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Line — View trends in data over time.

Examples: Stock price change over a five-year period or website page views during a month.



Bar — Compare data across categories.

Examples: Volume of shirts in different sizes, or percent of spending by department.



Heat Map — Show the relationship between two factors.

Examples: Segment analysis of target market, or sales leads by individual rep.



Chart Types

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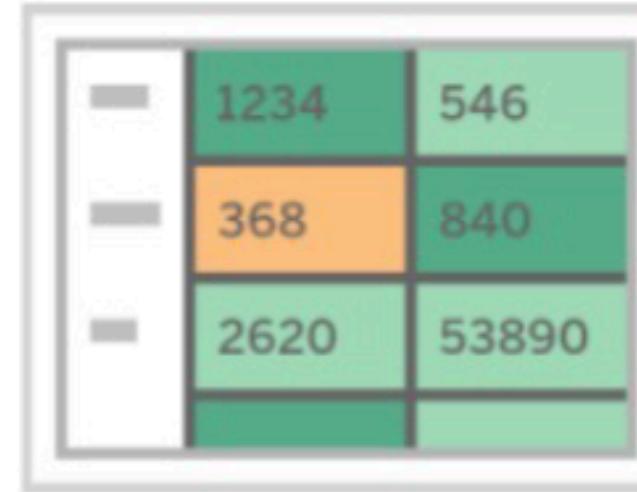
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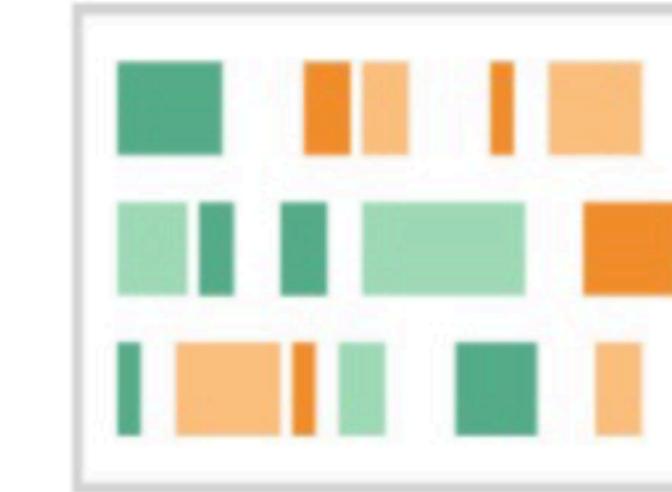
Highlight Table —
Shows detailed
information on heat
maps.

Examples: The percent
of a market for
different segments, or
sales numbers in



Treemap — Show
hierarchical data as a
proportion of a whole.

Examples: Storage
usage across computer
machines, comparing
fiscal budgets between
years.

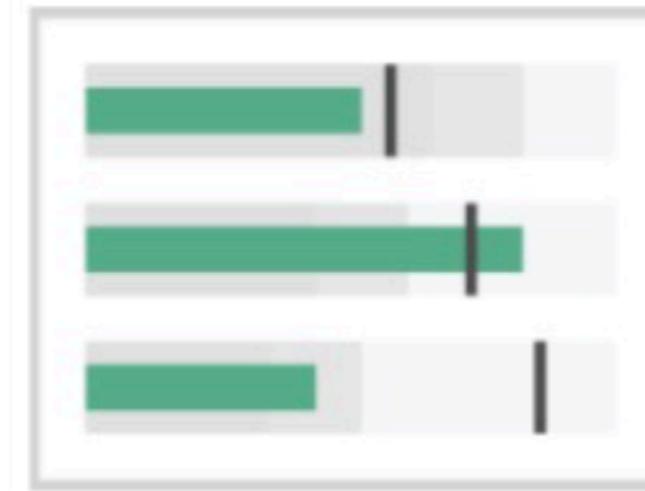


Gantt — Show
duration over time.

Examples: Project
timeline, duration of a
machine's use,
availability of players
on a team.

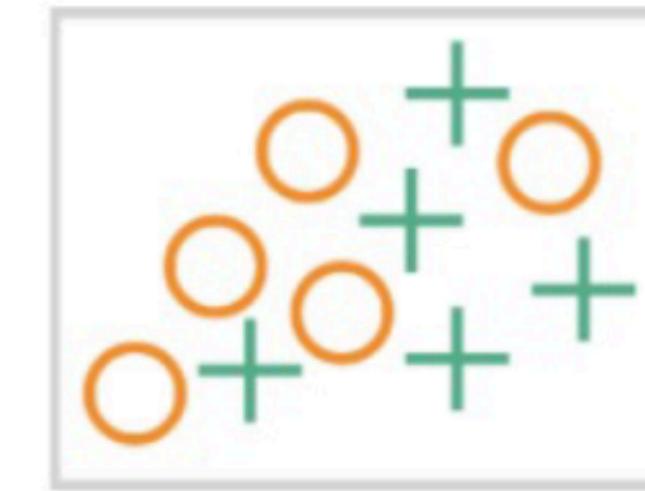
Chart Types

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Bullet — Evaluate performance of a metric against a goal.

Examples: Sales quota assessment, performance spectrum (great/good/poor).



Scatterplot — Investigate relationships between quantitative values.

Examples: Male versus female likelihood of having lung cancer at different ages



Histogram — Understand the distribution of your data.

Examples: Number of customers by company size, student performance on an exam, frequency of a product defect.



Chart Types

12

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Symbol maps — Use for totals rather than rates. Be careful, as small differences will be hard to see.

Examples: Number of customers in different geographies.



Area maps — Use for rates rather than totals. Use sensible base geography.

Examples: Rates of internet-usage in certain geographies, house prices in different neighborhoods.



Box-and-Whisker — Show the distribution of a set of a data.

Examples: Understanding your data briefly, seeing how data is skewed towards one end, identifying outliers in your data.



Tableau Workspace



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The screenshot shows the Tableau desktop interface. On the left, there's a vertical red line with numbered callouts from 12 to 20 pointing to various parts of the application. The main workspace is divided into several sections:

- Data Pane:** Located at the top left, it shows the current data source: "Sample - Superstore". It includes a search bar and a table of contents.
- Analytics Pane:** Located at the top center, it includes tabs for "Pages", "Filters", and "Marks". The "Marks" tab is selected, showing options for "Automatic" and "Color", "Size", "Text", "Detail", and "Tooltip".
- Workspace Area:** The main area is titled "Workspace" and contains two large, empty rectangular fields with placeholder text: "Drop field here" and "Drop field here".
- Callouts:** Numbered 12 through 20 point to specific elements:
 - 12: Points to the top edge of the Data pane.
 - 13: Points to the top edge of the Analytics pane.
 - 14: Points to the "Customer Name" field in the "Orders" table.
 - 15: Points to the "Order ID" field in the "Orders" table.
 - 16: Points to the "Profit (bin)" field in the "Orders" table.
 - 17: Points to the "Segment" field in the "Orders" table.
 - 18: Points to the "Ship Date" field in the "Orders" table.
 - 19: Points to the "Ship Mode" field in the "Orders" table.
 - 20: Points to the "Orders (Count)" field in the "Orders" table.

Tableau Workspace

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The screenshot shows the Tableau Data pane interface. On the left, a vertical list of numbered steps (12 to 20) is visible, with step 14 highlighted by a large orange circle. The Data pane itself has a header with tabs for "Data" and "Analytics", and a search bar. Below this, the "Tables" section lists three tables: "Orders", "People", and "Returns". The "Orders" table is expanded, showing its detailed fields: Customer Name, Location, Order Date, Order ID, Product, Profit (bin), Segment, Ship Date, Ship Mode, Top Customers by Pr..., Discount, Profit, Quantity, Sales, and Orders (Count). The "People" and "Returns" tables are collapsed. To the right of the Data pane, the workspace area is shown with sections for "Pages", "Columns", "Rows", "Filters", and "Workspace". A large orange box highlights the "Data" tab and the expanded "Orders" table in the Data pane.

Data pane

The **Data pane** lists all the fields from the source data.

Tableau Workspace

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The screenshot shows the Tableau desktop interface. On the left is the Data pane, which lists the 'Sample - Superstore' data source and various tables like 'Orders', 'People', and 'Returns'. The 'Orders' table is expanded, showing fields such as Customer Name, Location, Order ID, Product, Profit (bin), Segment, Ship Date, Ship Mode, Top Customers by Profit, Discount, Profit, Quantity, Sales, and Orders (Count). The 'Analytics' tab is selected at the top. In the center, the 'Pages' shelf is visible above the 'Workspace'. The 'Workspace' area has two shelves highlighted with an orange circle: the 'Columns' shelf and the 'Rows' shelf. A text box to the right of the workspace contains the following text:

Columns and Rows

The **Columns** and **Rows** shelves are used to create a structure for your visualization. You can place any number of fields on these shelves.

Tableau Workspace

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The screenshot shows the Tableau desktop interface. On the left, the 'Tables' pane lists various data sources and fields. A large orange circle highlights the 'Filters' shelf in the center, which contains a single item: 'Pages'. To the right of the filters, there's a 'Marks' shelf with options like Automatic, Color, Size, Text, Detail, and Tooltip. Below the marks shelf is a placeholder area with the text 'Drop field here'. The main workspace is titled 'Filters' and contains the text 'Filters allow you to include and exclude specific data.'.

Tableau Workspace

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The screenshot shows the Tableau desktop interface. On the left, the Data pane displays a project named "Sample - Superstore" with a search bar and a filter section. Below it, the Tables pane lists various data sources like Orders, People, and Returns, along with their respective fields such as Customer Name, Order ID, and Profit. The main workspace area is titled "Marks card". It features a "Drop field here" placeholder and a "Drop field here" header. A legend titled "Marks" is centered, showing options for Automatic, Color, Size, Text, Detail, and Tooltip. The "Color" option is highlighted with a red oval. To the right of the workspace is a "Drop field here" area.

Marks card

The **Marks** card is used to set different properties for fields in the visualization.

As you drag fields to different properties on the **Marks** card, you add more information to the view.

You use the **Marks** card to set the mark type and to encode your data in the view with color, size, shape, text, and other properties that add context, detail, and meaning to the marks in the view.

Tableau Workspace

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The screenshot shows the Tableau desktop interface. On the left, there's a vertical navigation bar with numbered items 12 through 20. The main workspace is divided into several sections:

- Data pane (top left):** Shows the "Data" tab is selected, connected to "Sample - Superstore". It includes a search bar and a "Tables" section listing "Discount", "Profit", "Quantity", "Sales", and "Orders (Count)". It also has sections for "People" and "Returns".
- View pane (middle left):** Titled "View", it contains the text: "The view shows your visualization. To start creating a view from a tabular perspective, you can drop a field to any areas labeled **Drop field here**."
- Workspace area (right):** Titled "Workspace", it features three "Drop field here" drag-and-drop zones.
- Top right corner:** A large orange rounded rectangle highlights the top-right corner of the workspace area.

Visualization



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The screenshot shows a data visualization tool interface. On the left, there's a sidebar with a 'Data' tab selected, showing a connection to 'Sample - Superstore'. Below it is a 'Tables' section with a tree view of data sources:

- Orders**:
 - Customer Name
 - Location
 - Order Date
 - Order ID
 - Product
 - Profit (bin)
 - Segment
 - Ship Date
 - Ship Mode
 - Top Customers by Pr...
 - Discount
 - Profit
 - Quantity
 - Sales
 - Orders (Count)
- People
- Returns

Below the tables is a 'Measure Names' section with:

- Profit Ratio
- Latitude (generated)
- Longitude (generated)

The main workspace is divided into three sections: 'Columns', 'Rows', and 'Workspace'. A large orange rectangle highlights the 'Columns' and 'Rows' sections. An orange arrow points from the 'Columns' section towards the 'Rows' section. The 'Workspace' section contains three 'Drop field here' labels.

Marks settings are visible on the right, showing 'Automatic' with options for Color, Size, Text, Detail, and Tooltip.

Visualization



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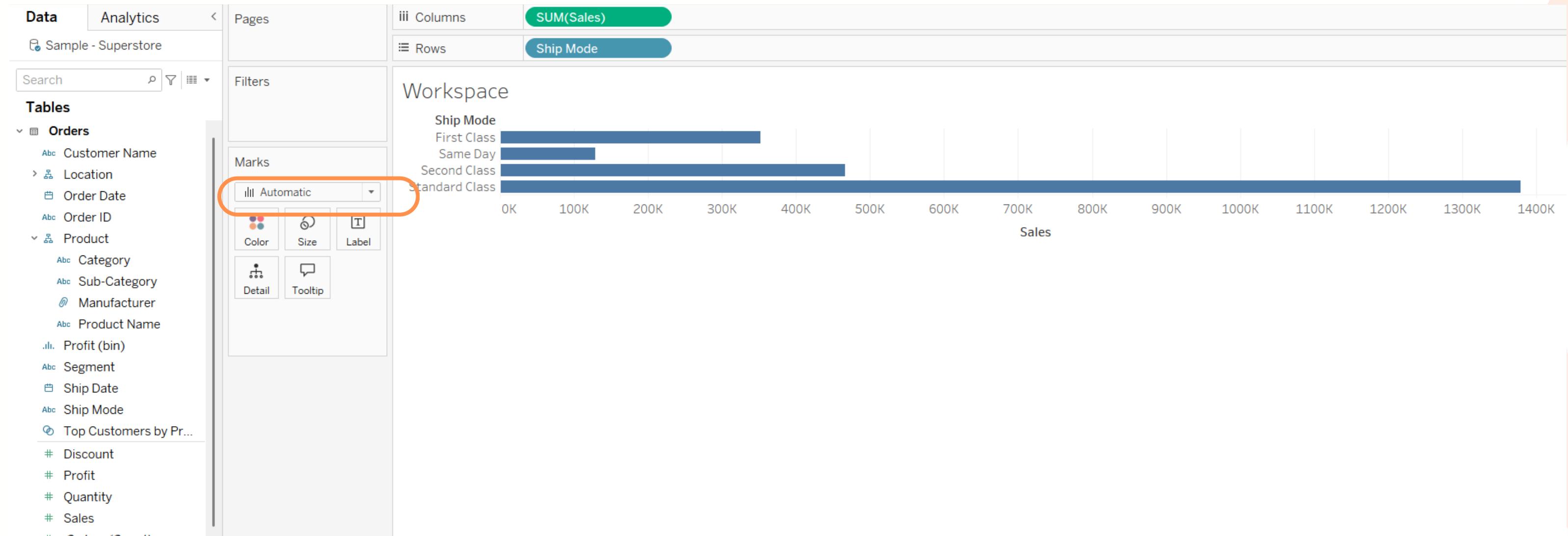
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Visualization

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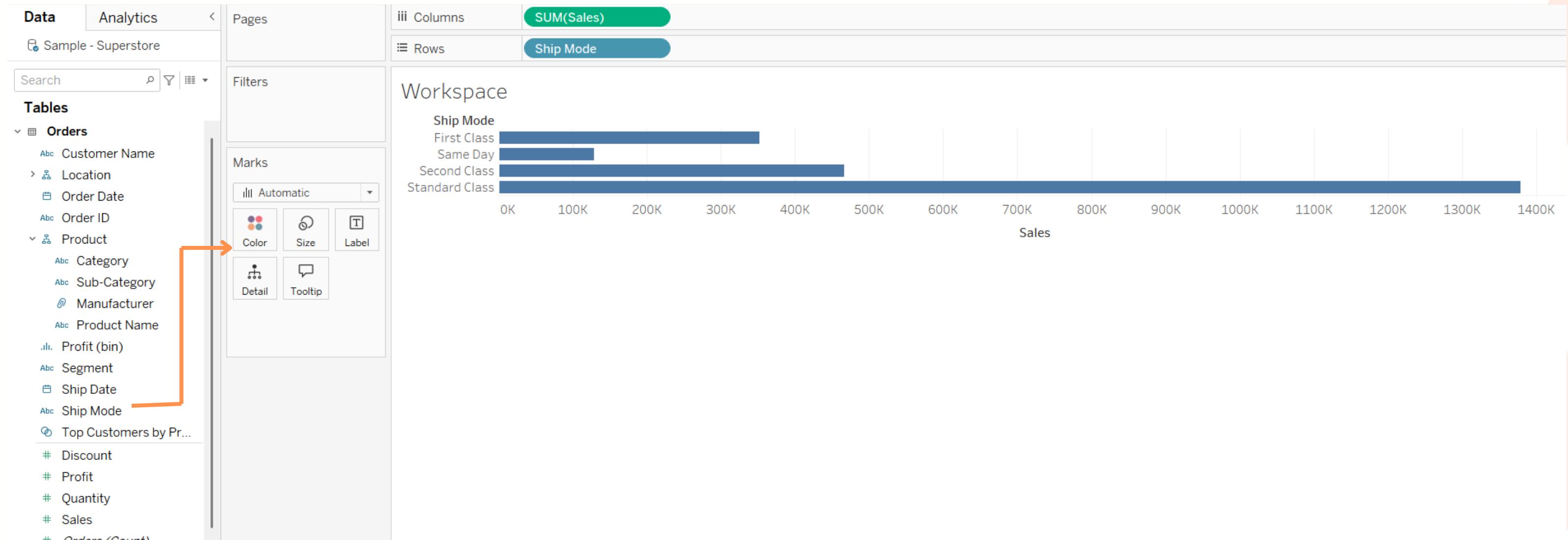
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Visualization

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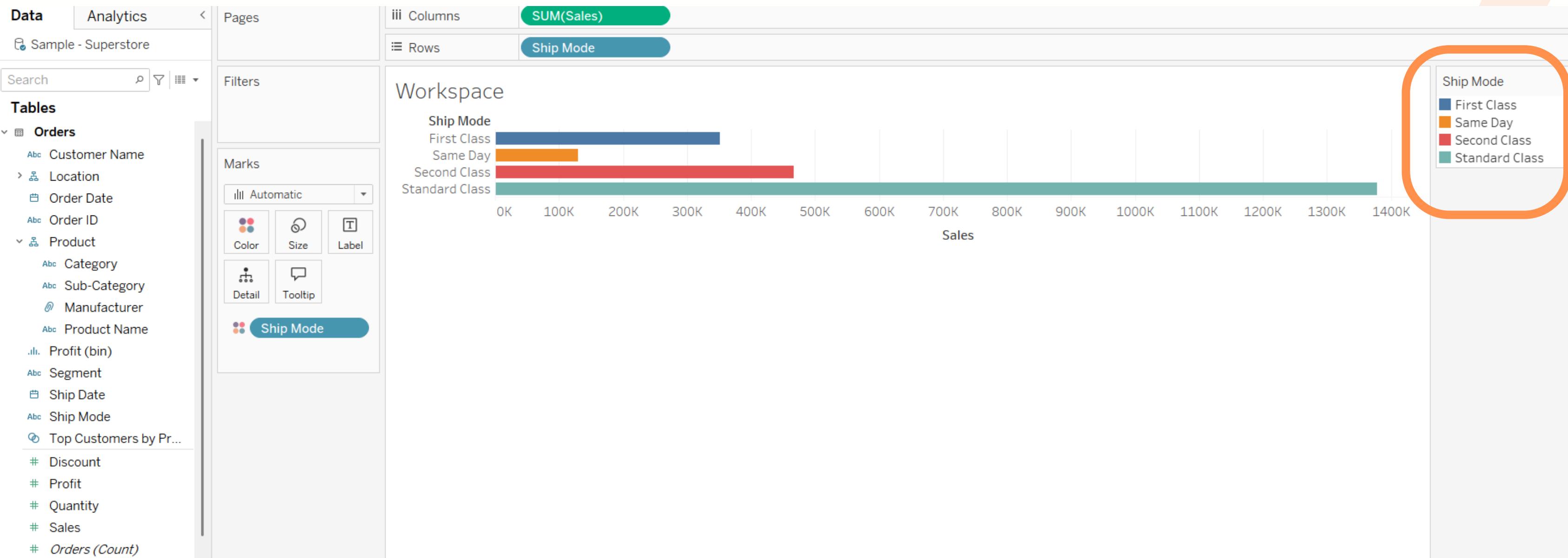
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Visualization



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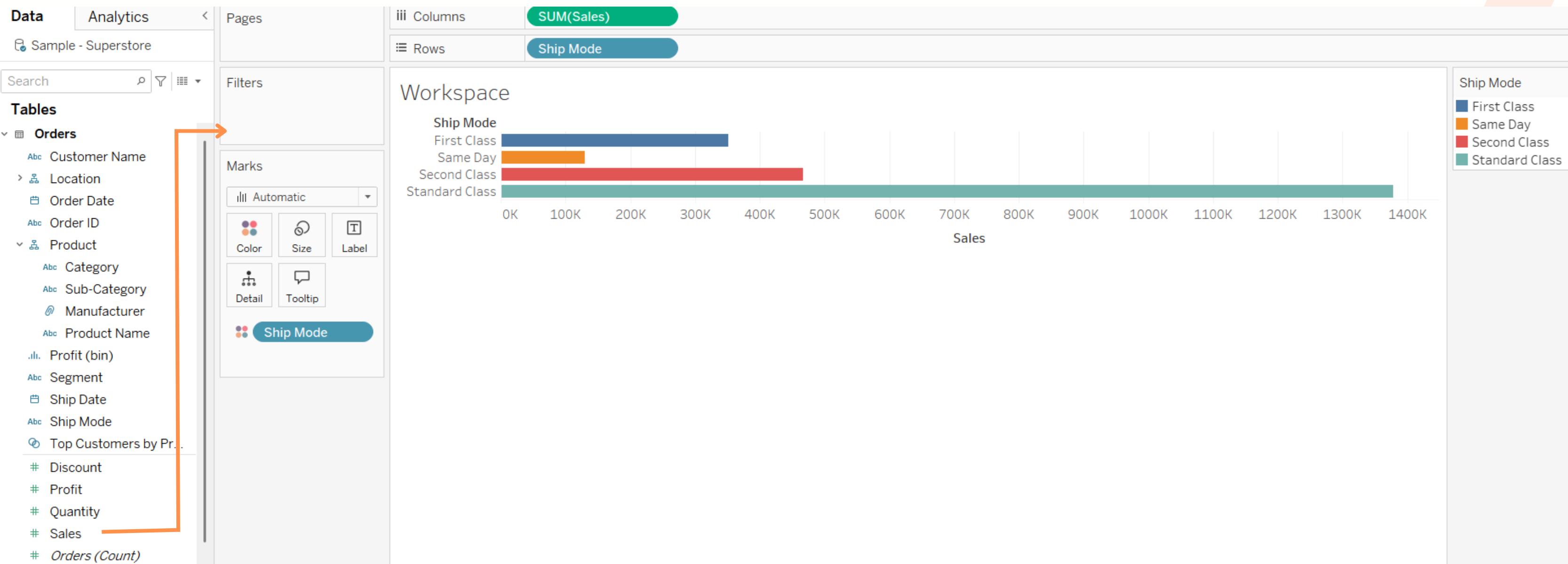
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Visualization



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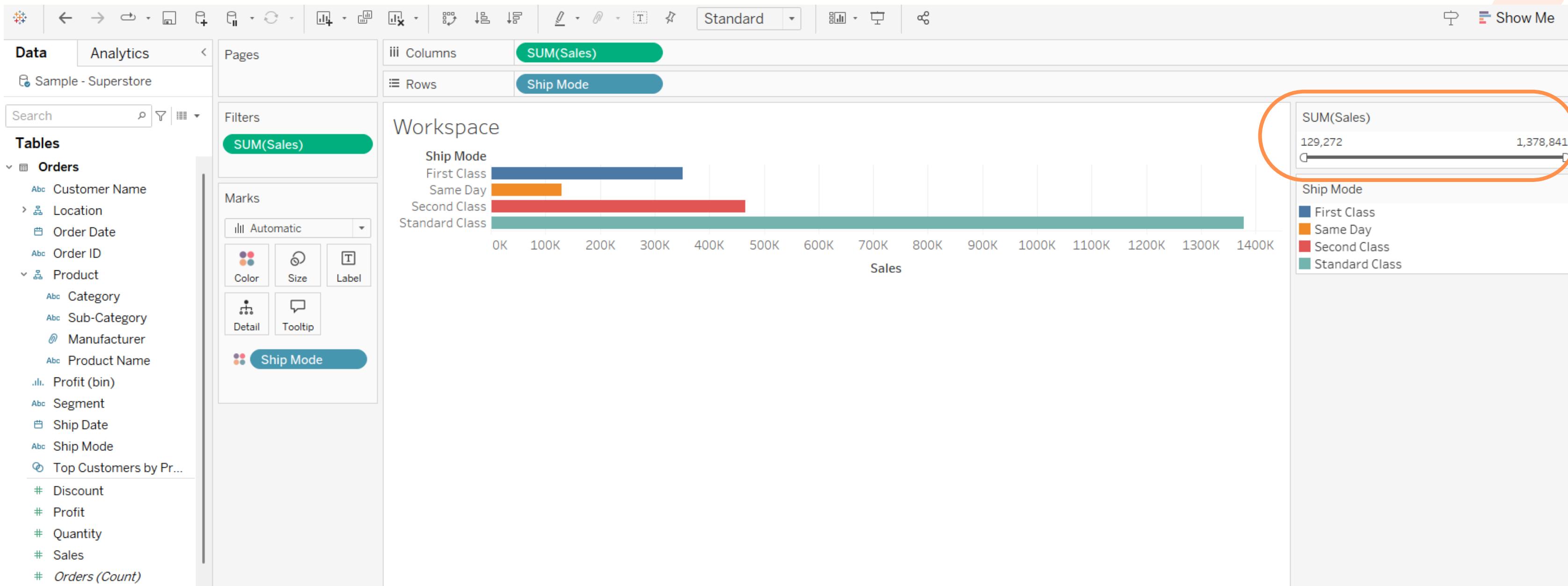
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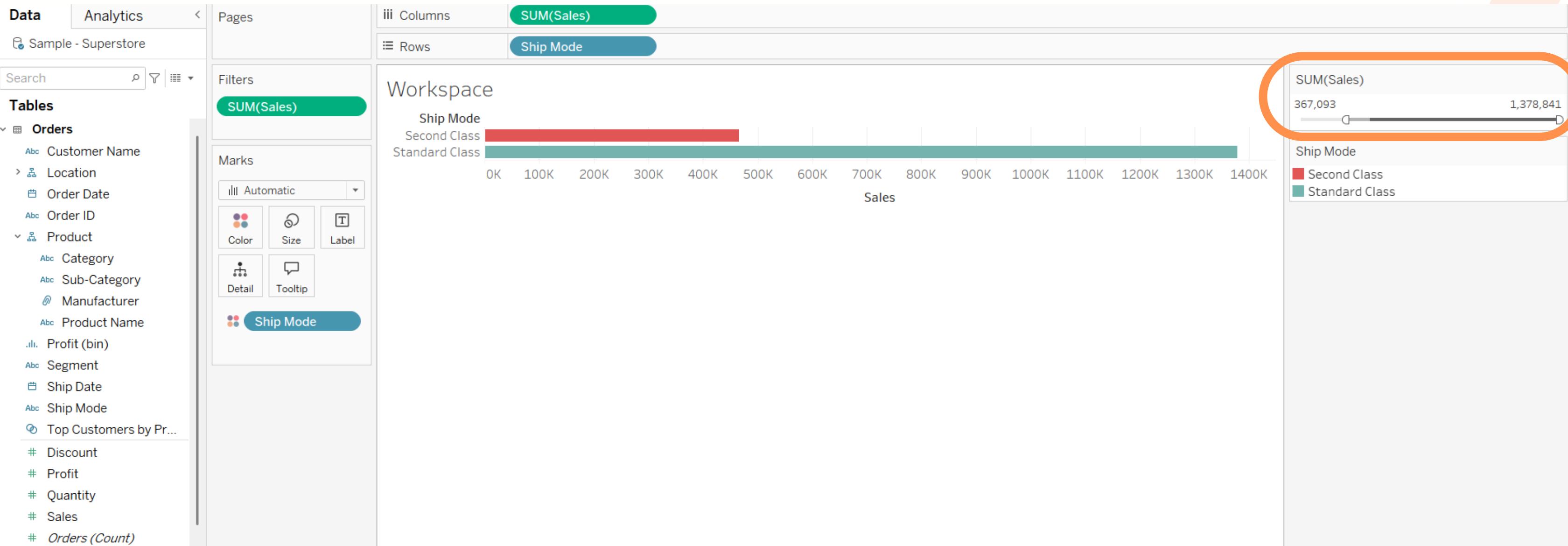
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Visualization

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Visualization



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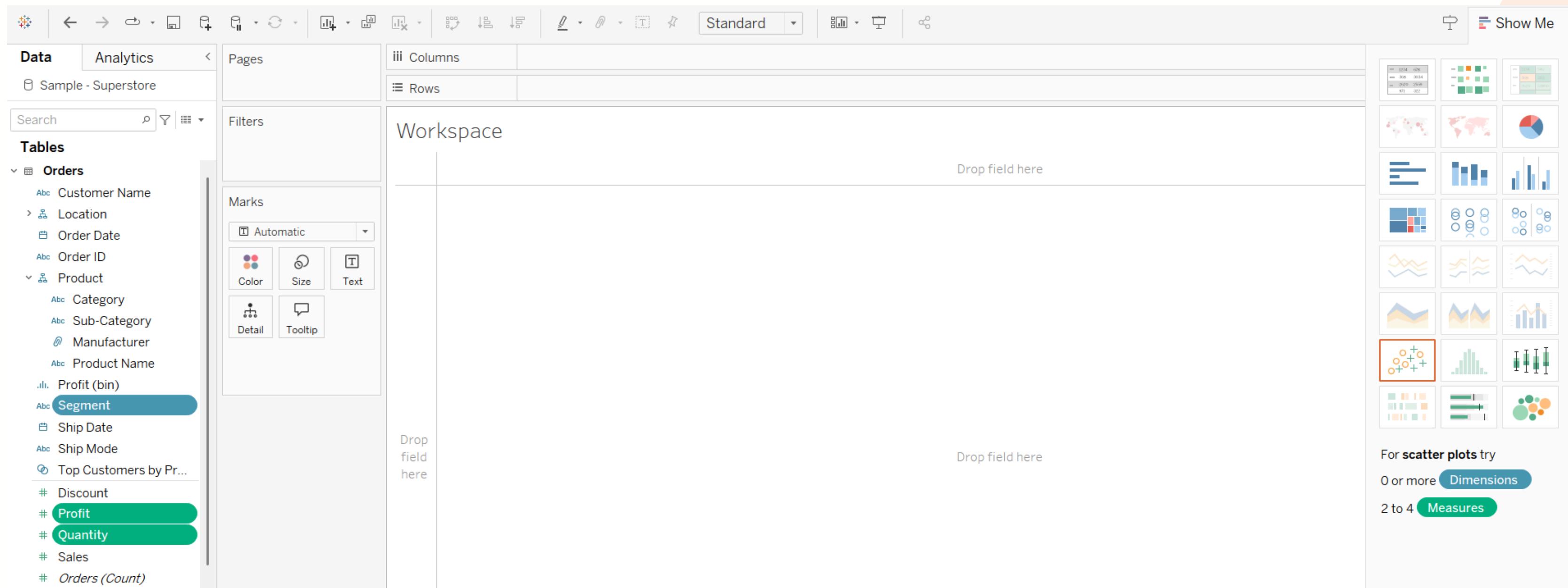
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Visualization



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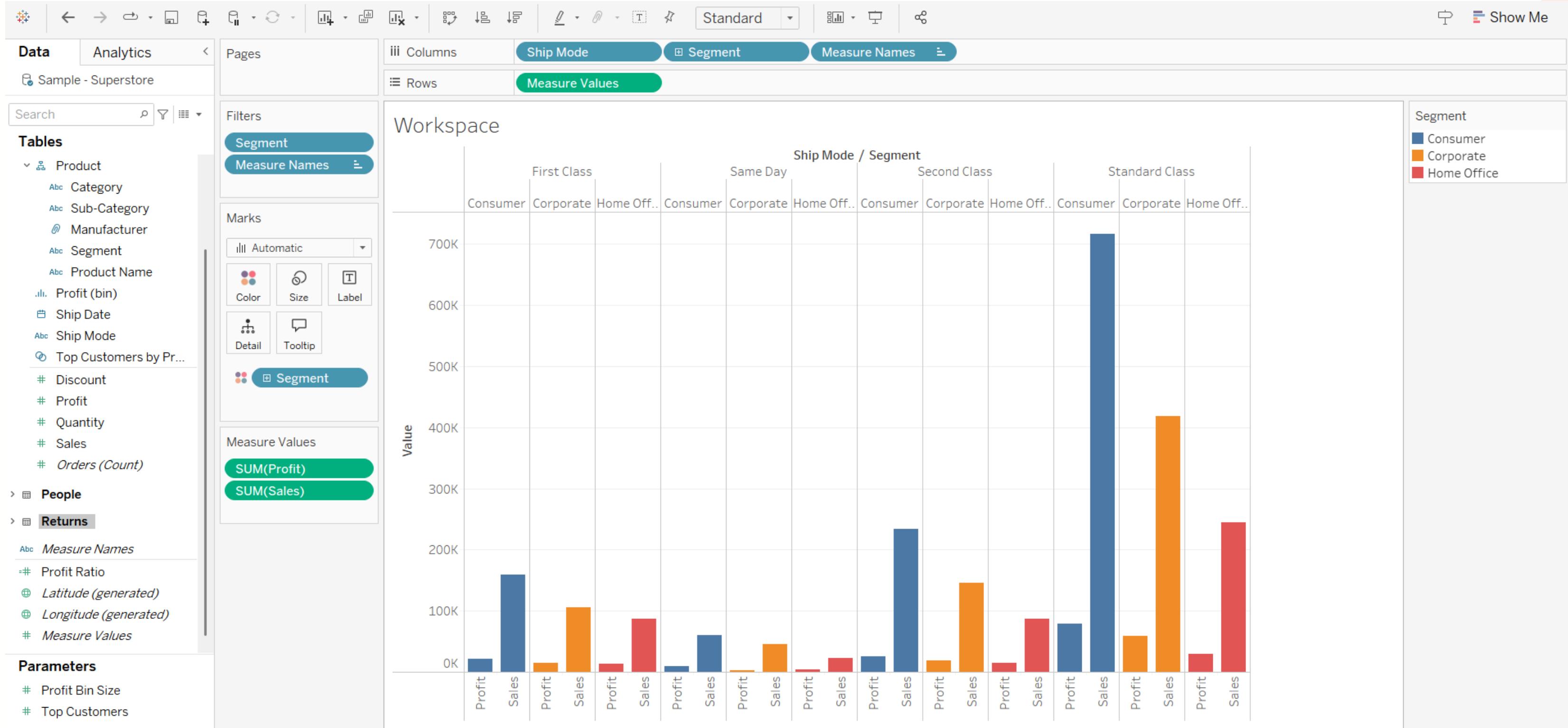
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Visualization



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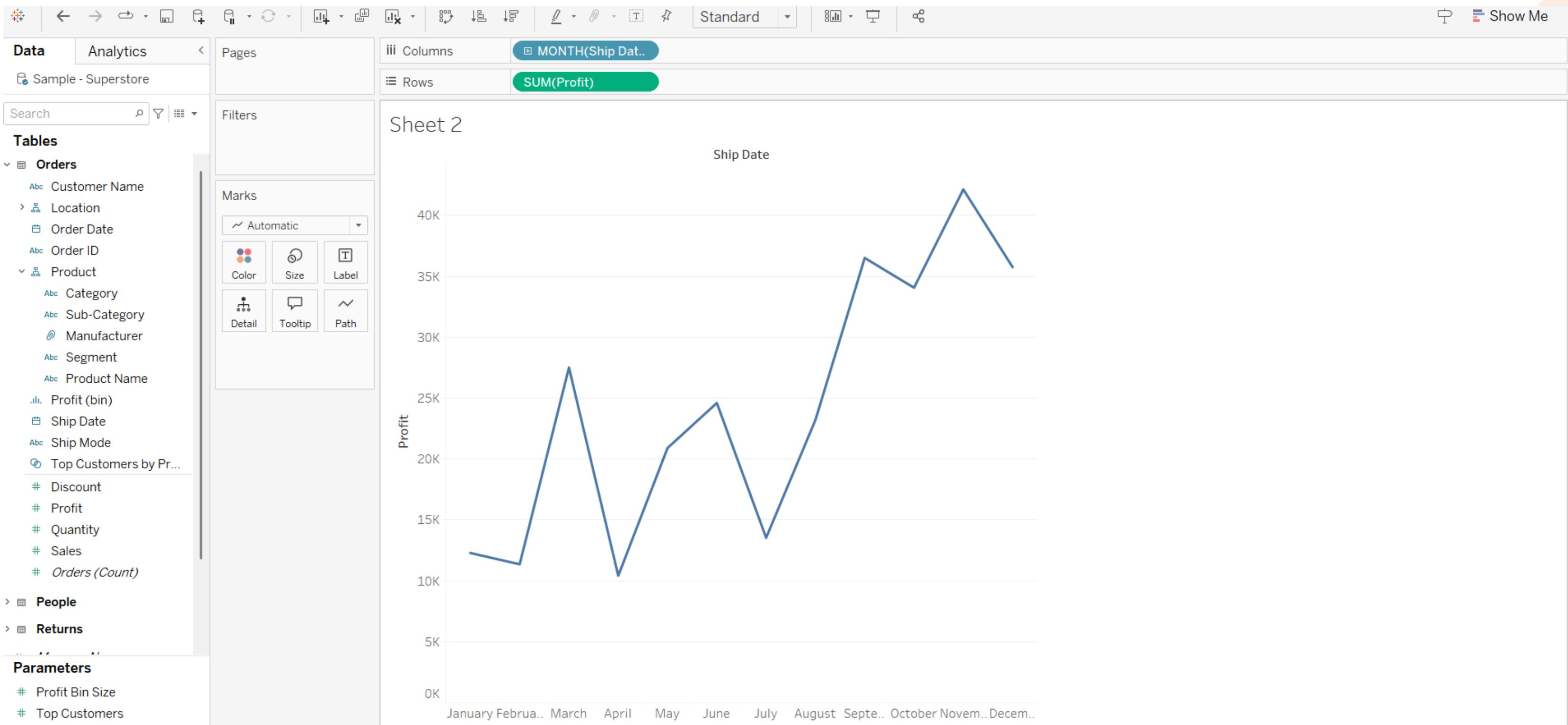
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Visualization



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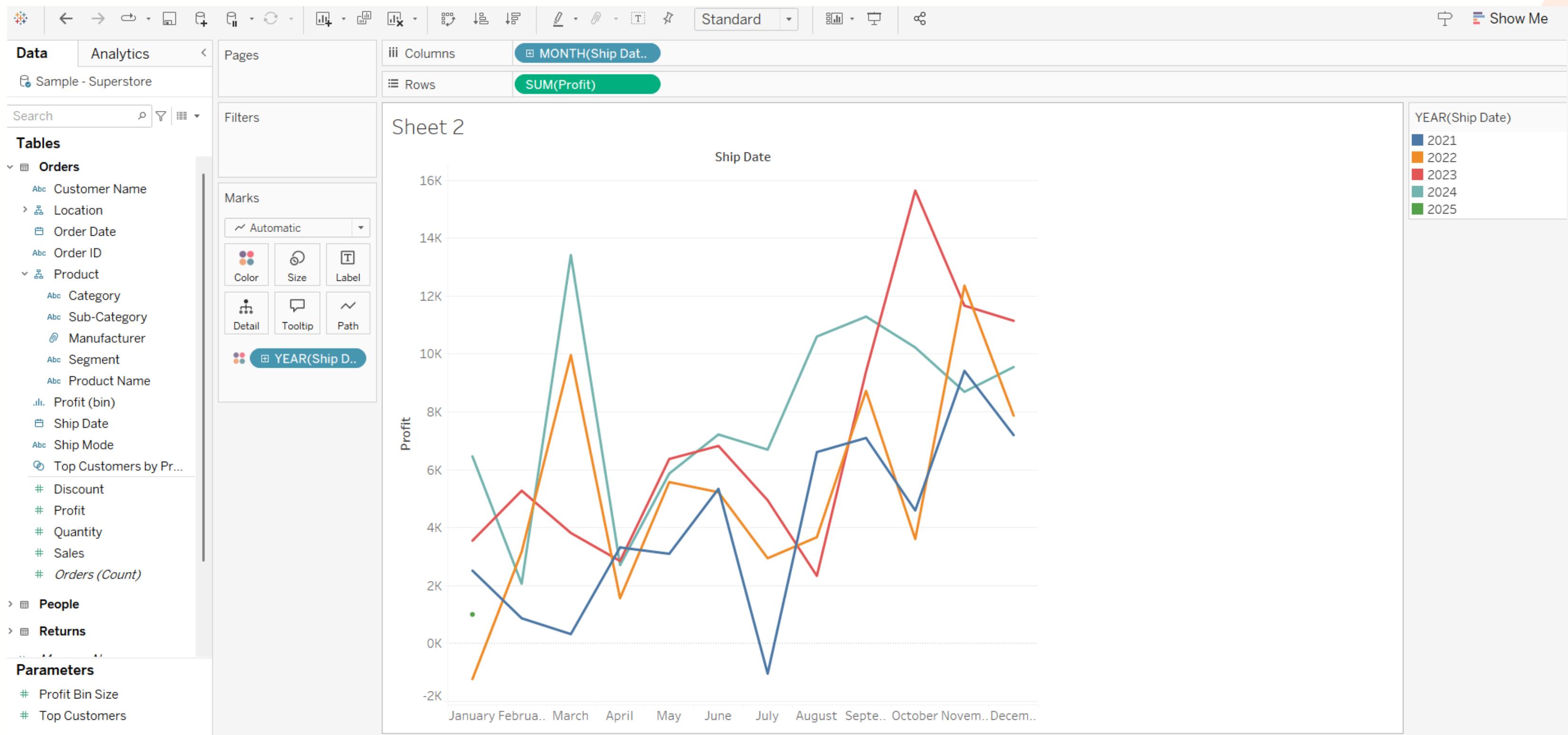
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Dashboard



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The screenshot shows the Tableau software interface. The top navigation bar includes File, Data, Worksheet, **Dashboard**, Story, Analysis, Map, Format, Server, Window, and Help. Below the navigation bar is a toolbar with various icons for data preparation and visualization. The left sidebar contains a 'Data' tab and an 'Analytics' tab, with 'Sample - Superstore' selected under 'Data'. The 'Tables' section lists several data sources: Orders (Customer Name, Location, Order Date, Order ID, Product, Category, Sub-Category, Manufacturer, Segment, Product Name, Profit (bin), Ship Date, Ship Mode, Top Customers by Pr..., Discount, Profit, Quantity, Sales, Orders (Count)) and People (Regional Manager, People (Count)). The 'Parameters' section includes Profit Bin Size and Top Customers. The main workspace is titled 'Sheet 7' and features three large, empty rectangular areas labeled 'Drop field here' for dragging and dropping data fields.

Dashboard



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The screenshot shows a software interface for creating dashboards. At the top is a menu bar with File, Data, Worksheet, Dashboard, Story, Analysis, Map, Format, Server, Window, and Help. Below the menu is a toolbar with various icons. The main area has tabs for 'Dashboard' (selected) and 'Layout'. Under 'Dashboard', there are sections for 'Default' (with 'Phone' as a sub-option) and 'Device Preview'. A 'Size' section shows 'Desktop Browser (1000 x 80...'. The central part of the interface is a sidebar with two main sections: 'Sheets' and 'Objects'. The 'Sheets' section is highlighted with an orange rounded rectangle and contains a list of chart types: Bar Chart, Pie Chart, Donut Chart, Line Chart, DisVsCon-Dates, Analytics-Pane, ScatterPlot, Histogram, and BulletGraph. The 'Objects' section contains a list of container and content types: Horizontal Container, Vertical Container, Text, Extension, Pulse Metric, Data Story, and Image. At the bottom of the sidebar are buttons for 'Tiled' (highlighted in blue) and 'Floating', and a checkbox for 'Show dashboard title'. To the right of the sidebar, the text 'We can drag and drop the sheets here' is displayed.

We can drag and drop the sheets here

Demo Story



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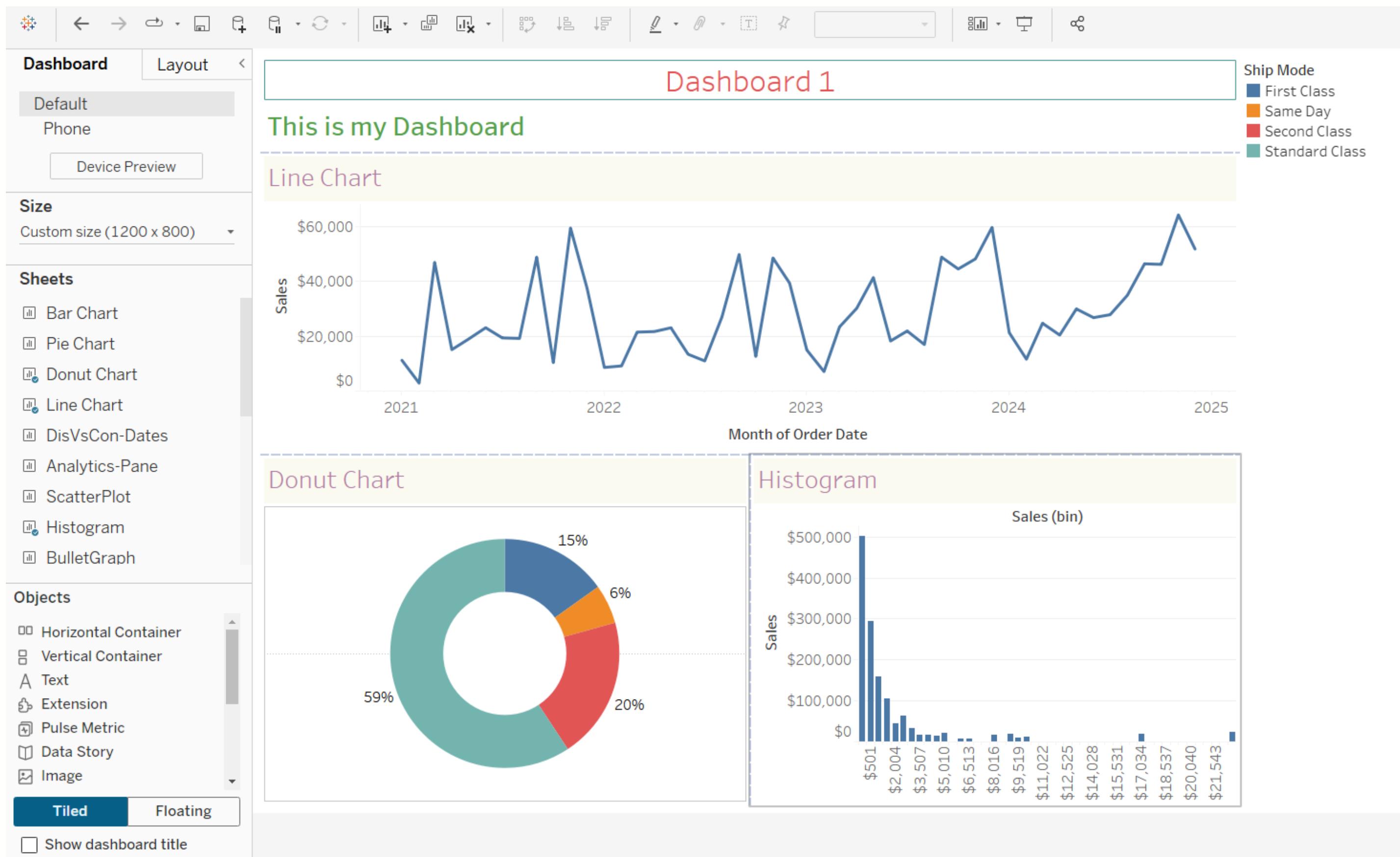
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Share



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Saved File

- .twb or .twbx
- Publish to Tableau Server (Secure)
- Publish to Tableau Public (Unsecure)



A large, bold, black sans-serif font text "THANK YOU" is centered in the middle of the slide. The text is surrounded by abstract, organic shapes in shades of orange and light peach. A thick orange curve arches from the top left towards the center, and another thick orange curve arches from the bottom right towards the center. There are also smaller, thin orange circles and a light peach circle in the corners.

THANK YOU

