



Getting Started with Data

Miriam McGaugh, PhD

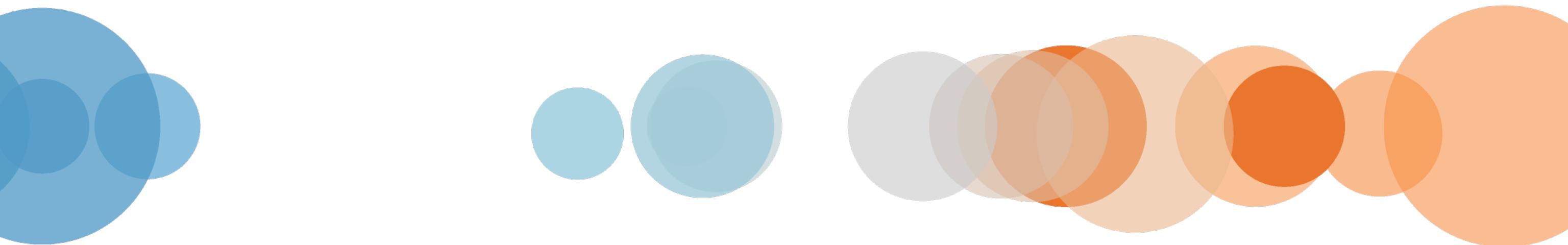
Clinical Assistant Professor, Marketing



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Connect to Data Screen

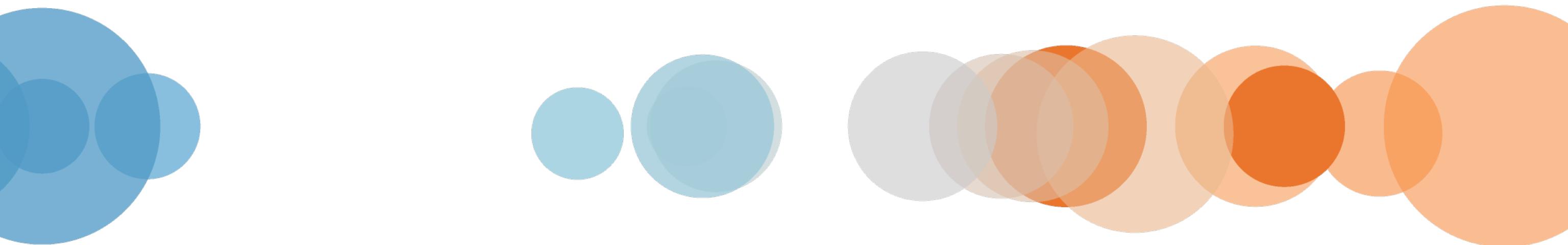


Connect to Data Screen



To connect to the Superstore file, **click on Excel**, navigate to where you saved the file and click open.

Connecting to Tableau



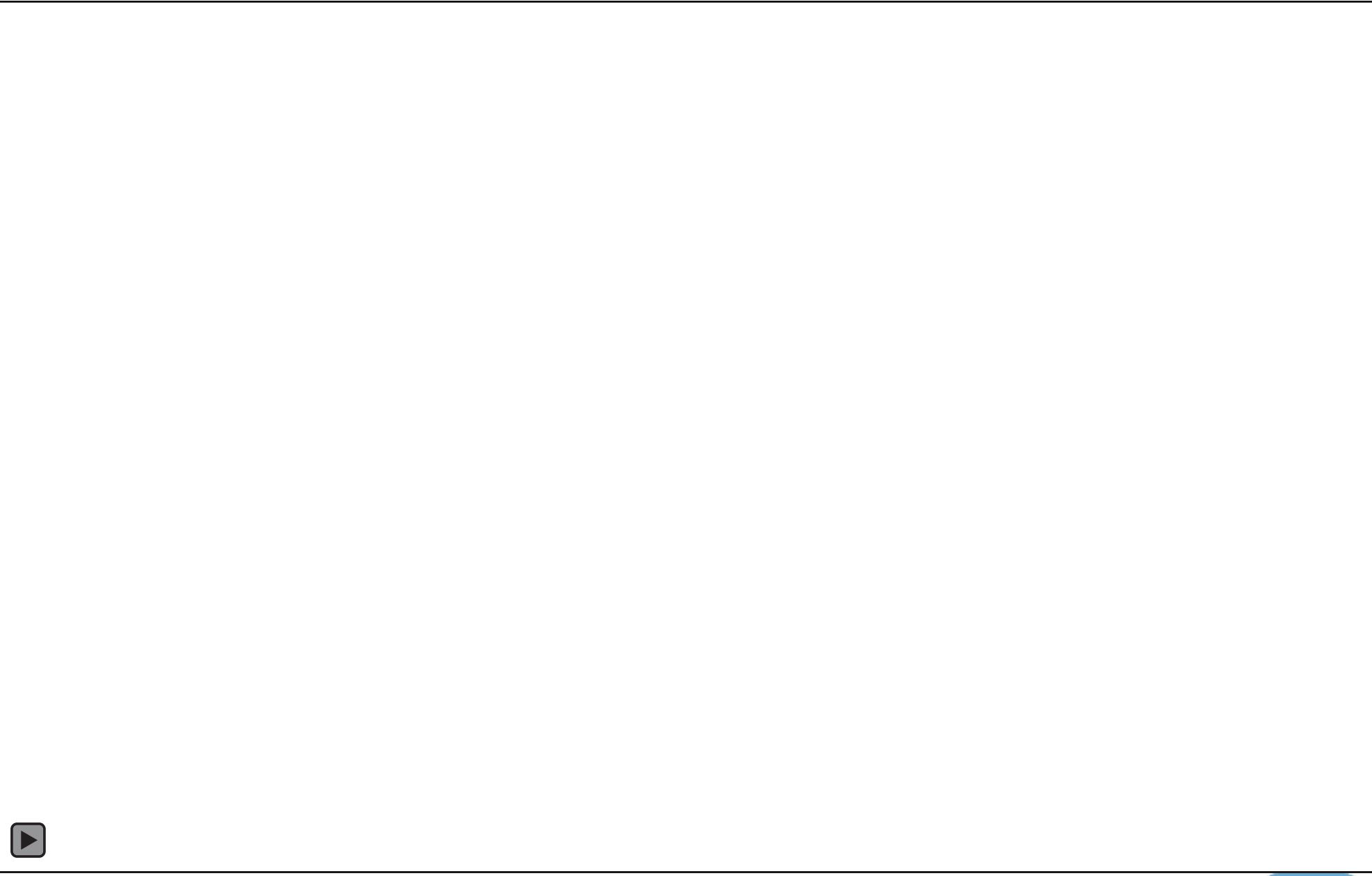
Connecting to Tableau

- Now Tableau brings us to the data connection window.
- Here we can see the name of the file – and here we can click to rename the connection if desired
- Down below, we can see all the sheets in the Excel file.
 - Sheets in Excel are treated the same as tables in databases, and we can choose to connect to a single table or join multiple tables.
- Simply **drag a sheet into the data connection canvas.**
 - Tables can be renamed simply by clicking on the name. The gear icon brings up options related to the data source.
 - We can see the data down in the preview pane.

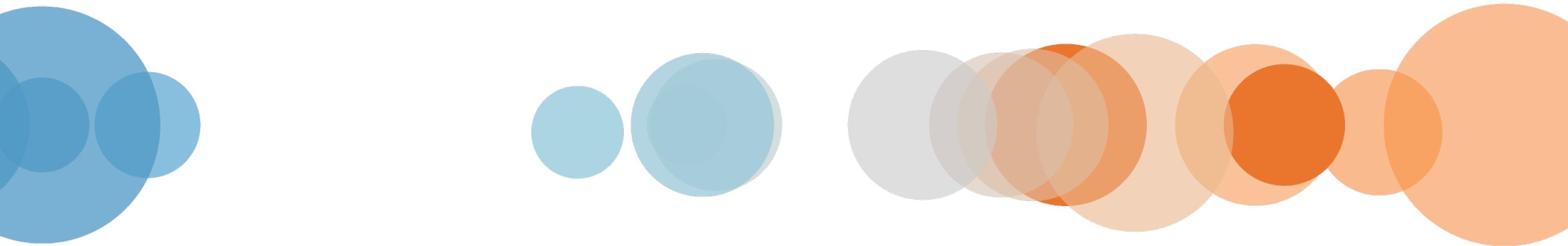
Connecting to Tableau

- There's a lot we can do on this screen (we will go over each of these in detail later in the class):
 - If our column names aren't ideal, we can **click on the drop down arrow** to the right of the name and select rename.
 - **Clicking on the data type** icon allows us to change the default data type for that column.
 - If a field contains data that is concatenated, like Order ID and we'd like to split it, we can do that with the **Split option** – either custom or automatic.

Connecting to Tableau



Live versus Extract



Live versus Extract

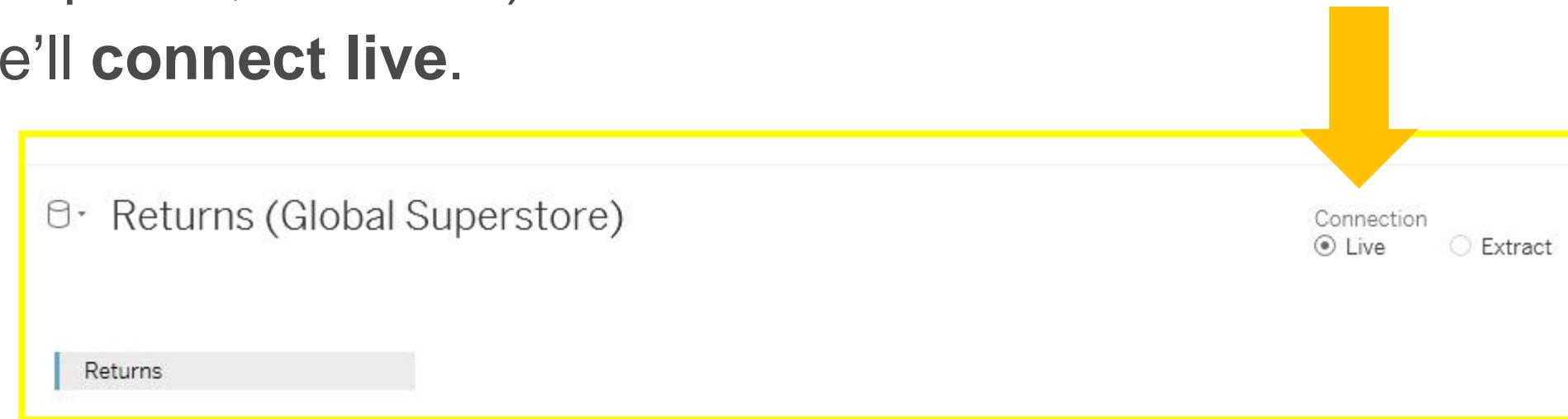
Something to consider before we begin analyzing our data is if we want to connect live or extract.

- Connecting live leaves the data in the database or source file.
- This is best when we want to leverage a high performance database's capabilities, or to get up-to-the-second changes in data visualized in Tableau.
- That being said, sometimes connecting live can result in a slow experience, depending on the database.

Live versus Extract

The other option is to extract the data into Tableau's high performance in-memory data engine.

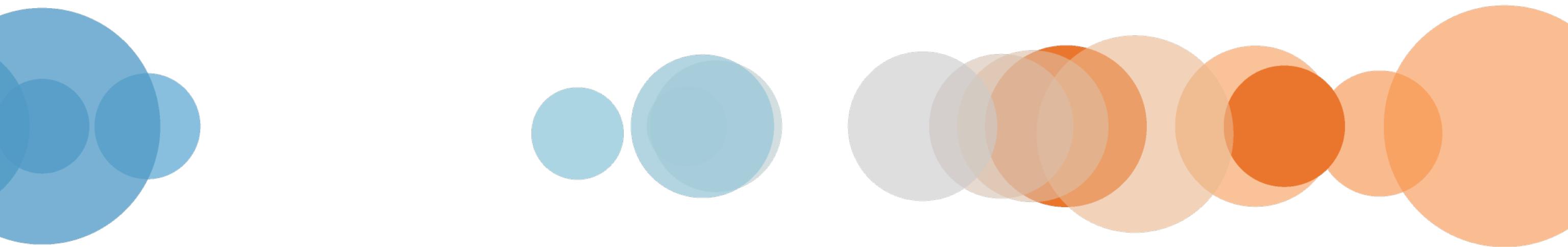
- This can help when connecting to a slow database or to take query load off critical systems.
- We can also import only some of the data and bring in specific elements (to access those options, click Edit)
- For now, we'll **connect live**.



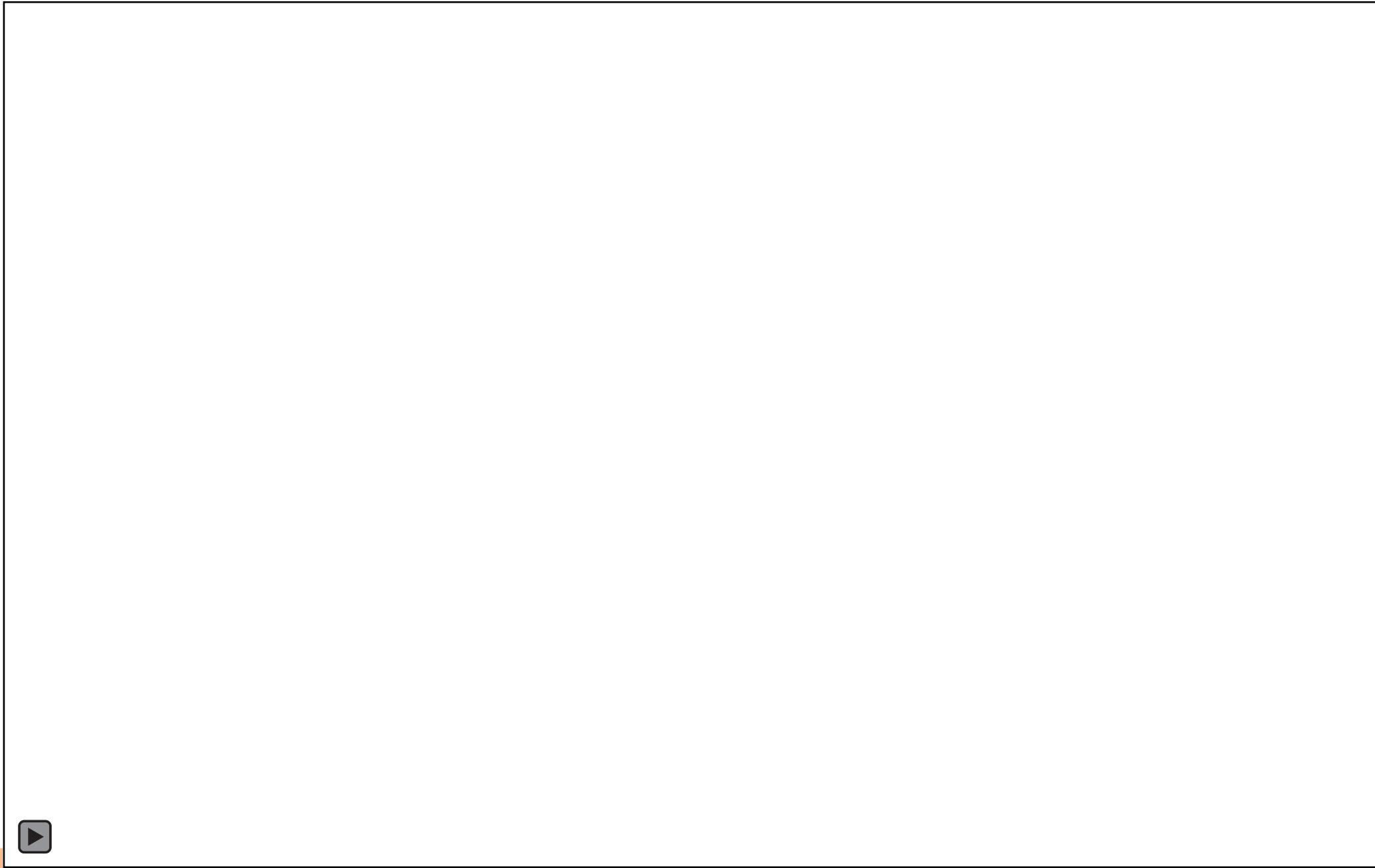
Live versus Extract

Click on the first Sheet tab to open the canvas. If you ever want to go back to the data connection window, simply click on the Data Source tab.

Quick Viz Example

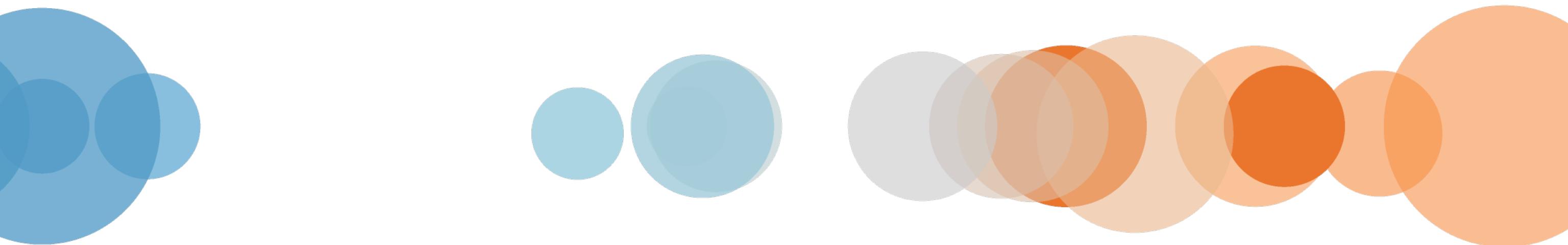


Quick Viz Example



tableau

Connecting to Multiple Tables



Connecting to Multiple Tables

Next, what if we realize we need to bring in additional data?

- To add columns from *other tables* in the *same data source* (i.e. other worksheets in our Excel file), we need to edit our data connection.
- To do so, **click on the Data Source tab**.
- Let's join our *returns table* to the *orders table*.
 - Double click or **drag out Returns**.

Connecting to Multiple Tables

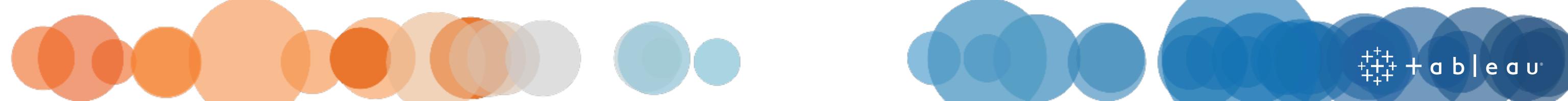
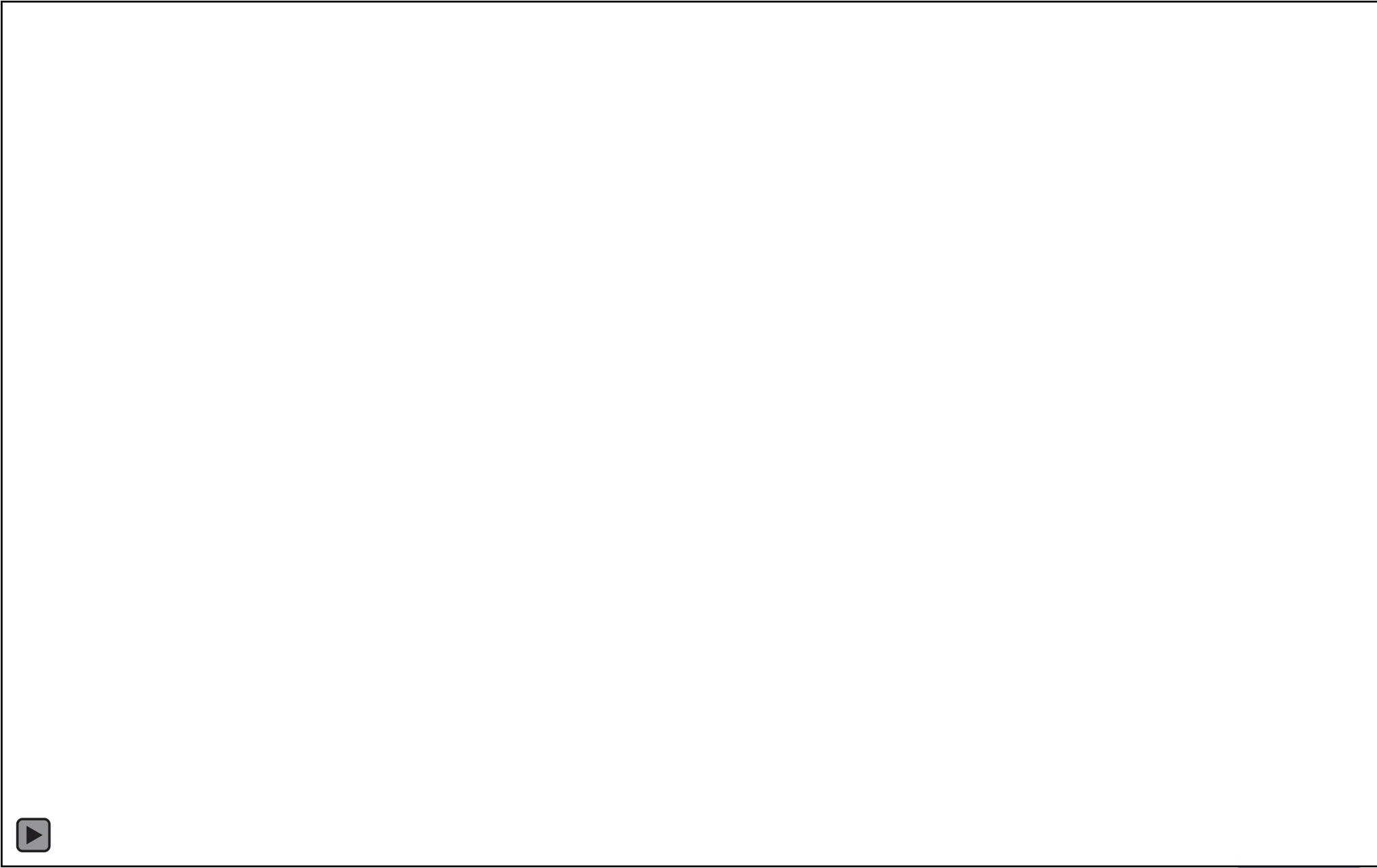
- **Click on the join icon** to show the details.
- The default join clause is shown here.
- Tableau has figured out that Market is a common field between these two tables.
- If desired, we could edit the join clause, or even create a new one
- For these data we could also select a left join (explain the difference).
- For now we'll **change it to Left** and close the dialog.

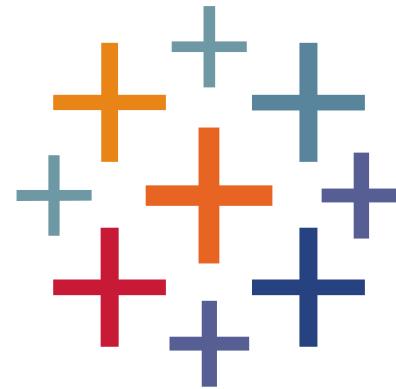
Again, we can view the data down here and verify the data we'll be connecting to.

It looks good, so we'll click back onto our sheet.

We now have columns from both Orders and Returns in our data window and are ready to start our analysis!

Connecting to Multiple Tables





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