

## Module 11: Exploring Tableau Online

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Demo Document III

**edureka!**

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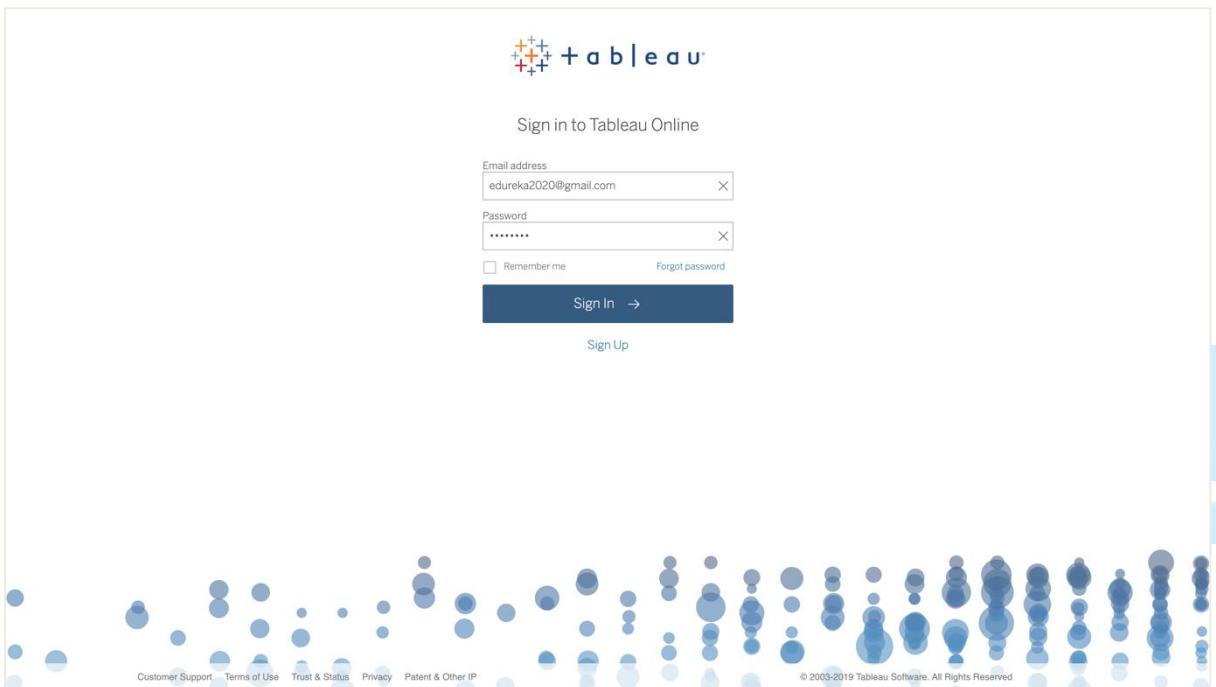
## Demo III

Interacting with Content on Tableau Online (Explorer)

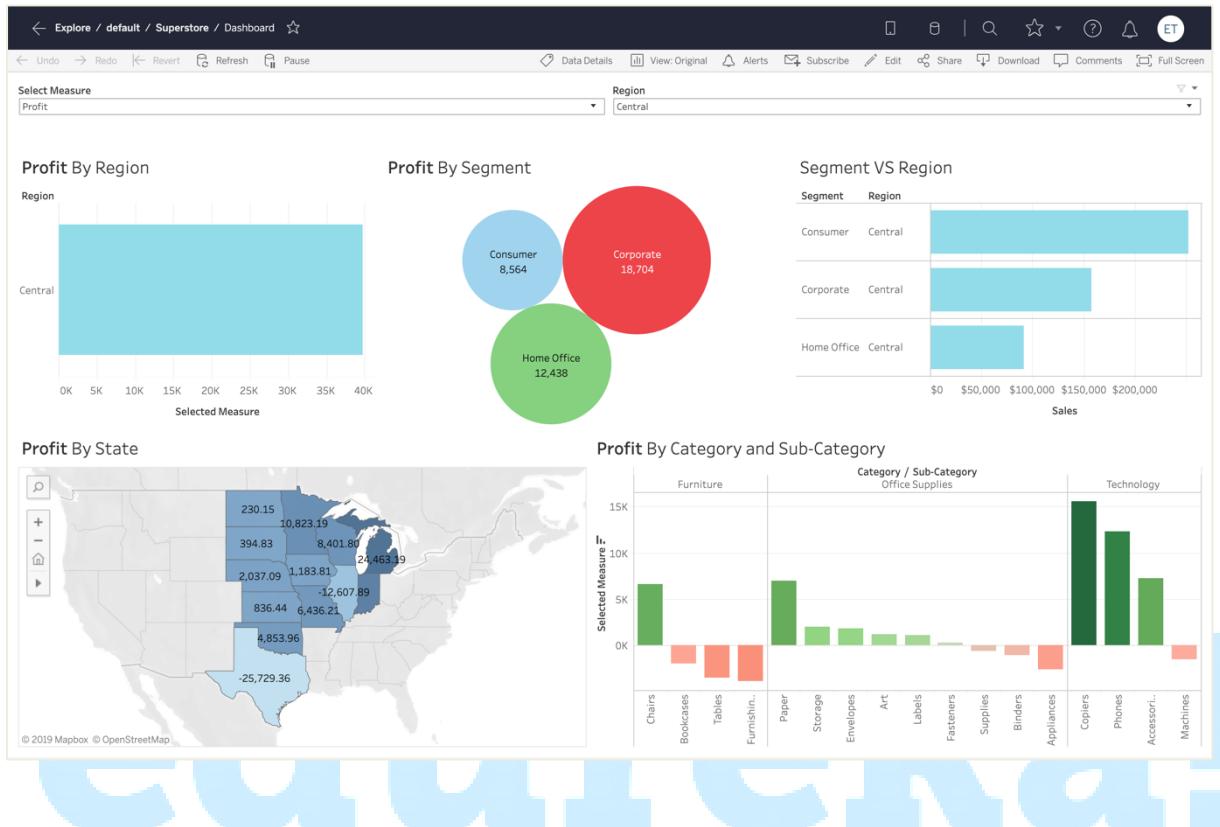
(Refer to the dataset from the file: Superstore.xlsx)

## Demo III-Solution

- Login in to Tableau Online using an Explorer account.

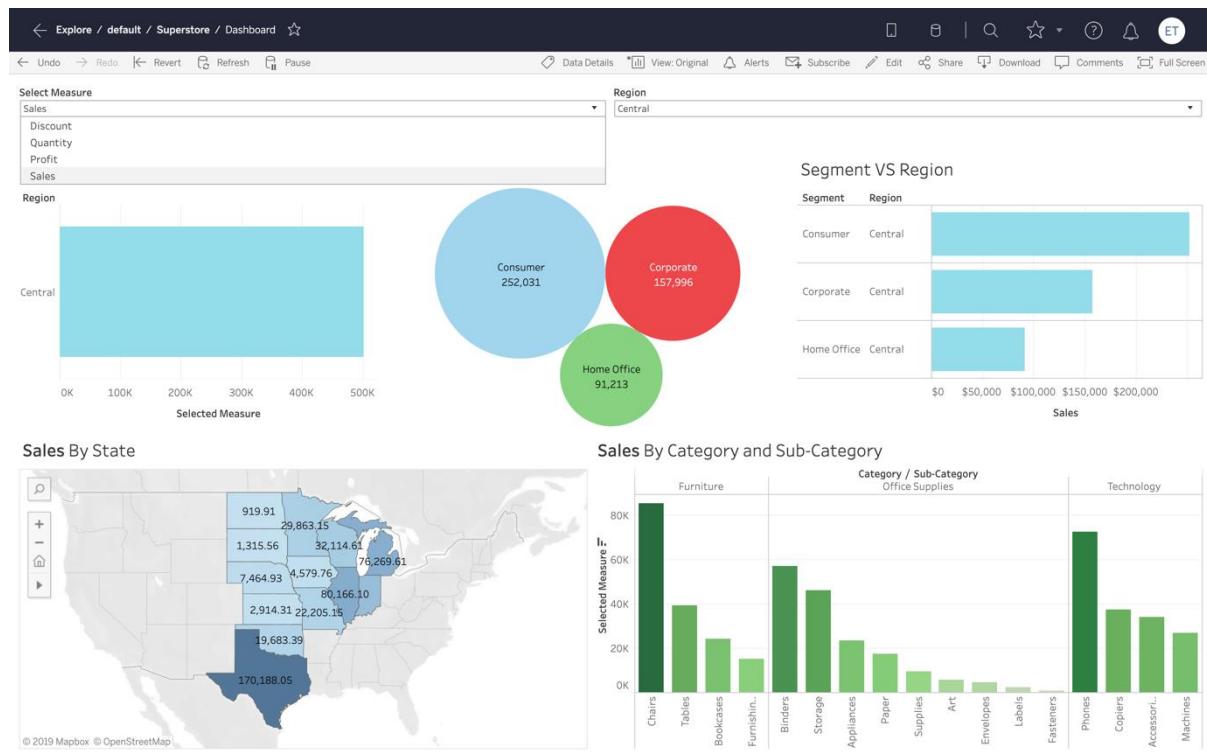


- Open a Workbook.

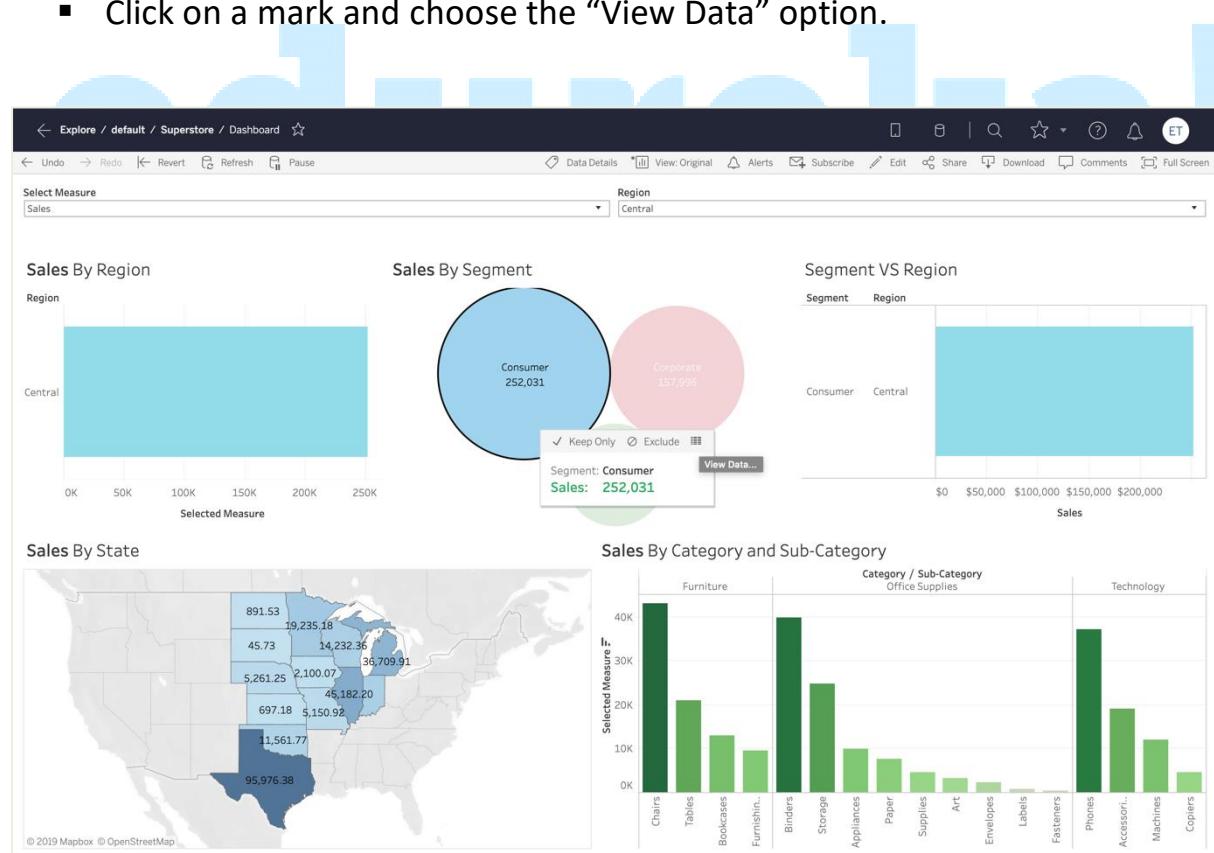


- Interact with the dashboard by choosing the options from “Select Measures” and “Region”.

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- Click on a mark and choose the “View Data” option.



**View Data**

Summary **Full data**

Showing first 200 rows.  
[Download all rows as a text file](#)

Show all columns

Category	Country	Region	Segment	State	Sub-Category	Discount	Profit	Quantity	Sales	Selected Measure
Office Supplies	United States	Central	Consumer	Missouri	Binders	0%	\$8	3	\$16.20	
Furniture	United States	Central	Consumer	Oklahoma	Furnishings	0%	\$214	6	\$822	821.88
Office Supplies	United States	Central	Consumer	Illinois	Appliances	80%	-\$109	7	\$53	53.09
Office Supplies	United States	Central	Consumer	Texas	Appliances	80%	-\$47	5	\$18	18.32
Office Supplies	United States	Central	Consumer	Texas	Appliances	80%	-\$75	8	\$29	29.31
Office Supplies	United States	Central	Consumer	Texas	Appliances	80%	-\$31	4	\$12	11.65
Office Supplies	United States	Central	Consumer	Texas	Appliances	80%	-\$12	2	\$5	4.84
Office Supplies	United States	Central	Consumer	Missouri	Appliances	0%	\$7	2	\$24	24.18
Office Supplies	United States	Central	Consumer	Texas	Appliances	80%	-\$243	4	\$97	97.26
Office Supplies	United States	Central	Consumer	Texas	Fasteners	20%	\$1	1	\$2	2.30
Office Supplies	United States	Central	Consumer	Texas	Binders	80%	-\$33	5	\$21	21.38
Office Supplies	United States	Central	Consumer	Texas	Binders	80%	-\$7	1	\$4	4.28
Office Supplies	United States	Central	Consumer	Illinois	Binders	80%	-\$18	5	\$10	10.43
Office Supplies	United States	Central	Consumer	Michigan	Binders	0%	\$6	2	\$13	12.76
Office Supplies	United States	Central	Consumer	Texas	Binders	80%	-\$15	3	\$10	9.76
Office Supplies	United States	Central	Consumer	Texas	Binders	80%	-\$18	7	\$10	10.43
Office Supplies	United States	Central	Consumer	Illinois	Fasteners	20%	\$4	5	\$13	13.16
Office Supplies	United States	Central	Consumer	Illinois	Fasteners	20%	\$3	4	\$11	10.53
Office Supplies	United States	Central	Consumer	Illinois	Fasteners	20%	\$2	3	\$8	7.90
Office Supplies	United States	Central	Consumer	Texas	Storage	20%	-\$3	2	\$48	47.58
Office Supplies	United States	Central	Consumer	Texas	Storage	20%	\$0	1	\$17	16.78
Office Supplies	United States	Central	Consumer	Michigan	Storage	0%	\$12	3	\$63	62.94
Office Supplies	United States	Central	Consumer	Michigan	Binders	0%	\$9	5	\$19	19.05
Office Supplies	United States	Central	Consumer	Illinois	Binders	80%	-\$5	1	\$3	2.89
Office Supplies	United States	Central	Consumer	Illinois	Appliances	80%	-\$71	3	\$26	26.41
Office Supplies	United States	Central	Consumer	Texas	Binders	80%	-\$2	2	\$1	1.11
Office Supplies	United States	Central	Consumer	Illinois	Binders	80%	-\$4	3	\$3	2.81
Office Supplies	United States	Central	Consumer	Wisconsin	Binders	0%	\$6	3	\$12	12.39
Office Supplies	United States	Central	Consumer	Wisconsin	Binders	0%	\$4	2	\$8	8.26
Office Supplies	United States	Central	Consumer	Minnesota	Binders	0%	\$4	2	\$8	8.26
Office Supplies	United States	Central	Consumer	Texas	Binders	80%	-\$7	6	\$4	4.49
Office Supplies	United States	Central	Consumer	Illinois	Binders	80%	-\$4	4	\$3	2.99
Office Supplies	United States	Central	Consumer	Illinois	Supplies	20%	\$3	5	\$41	40.92
Office Supplies	United States	Central	Consumer	Texas	Supplies	20%	\$1	2	\$13	13.34
Office Supplies	United States	Central	Consumer	Texas	Supplies	20%	\$1	1	\$7	6.67
Office Supplies	United States	Central	Consumer	Illinois	Supplies	20%	\$3	3	\$22	22.34

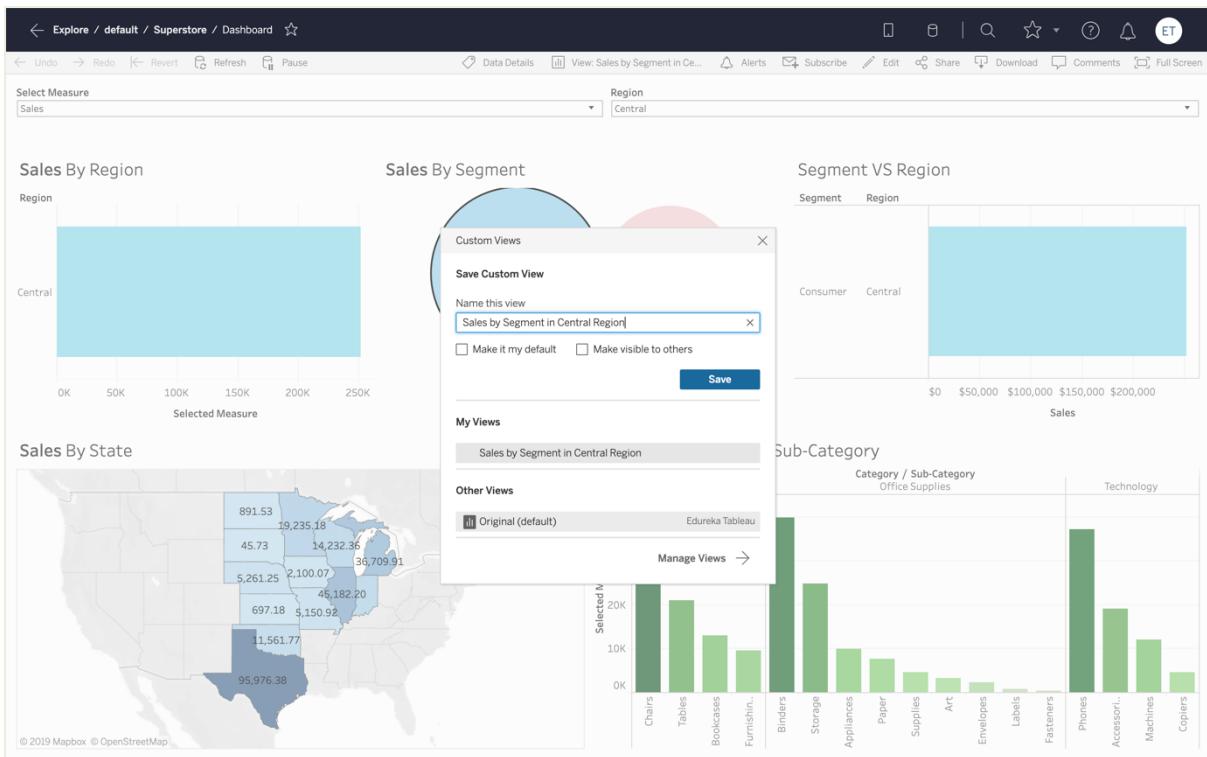
- Click on the “View” icon in order to create a custom view.

The screenshot shows a Tableau Online dashboard titled "Superstore / Dashboard". The dashboard includes several visualizations:
 

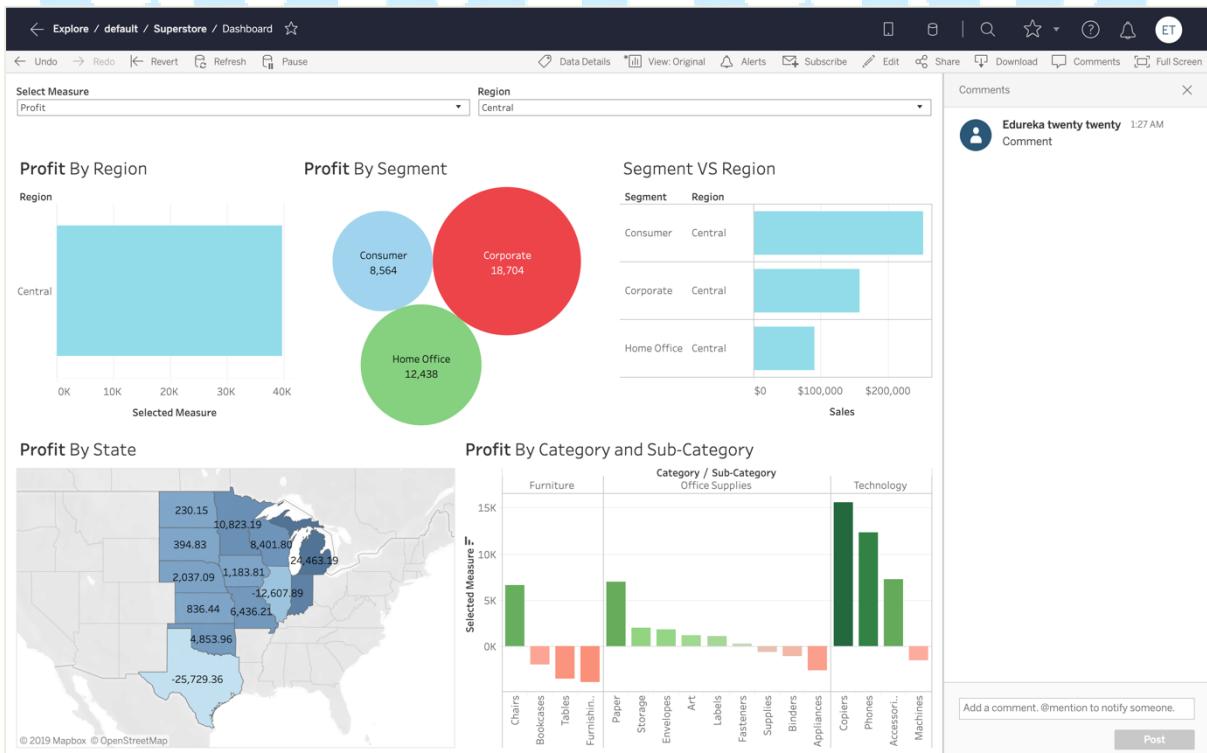
- A bar chart titled "Sales By Region" showing sales for the Central region.
- A bar chart titled "Sales By Segment" showing sales for Consumer and Central segments.
- A bar chart titled "Segment VS Region" showing sales for Consumer and Central regions.
- A map titled "Sales By State" showing sales across US states.
- A bar chart titled "Sub-Category" showing sales for various categories like Chairs, Tables, Binders, etc.

 A "Custom Views" dialog box is open in the center, prompting the user to "Save Custom View" with the name "Sales by Segment in Central Region". It also includes options to "Make it my default" and "Make visible to others".

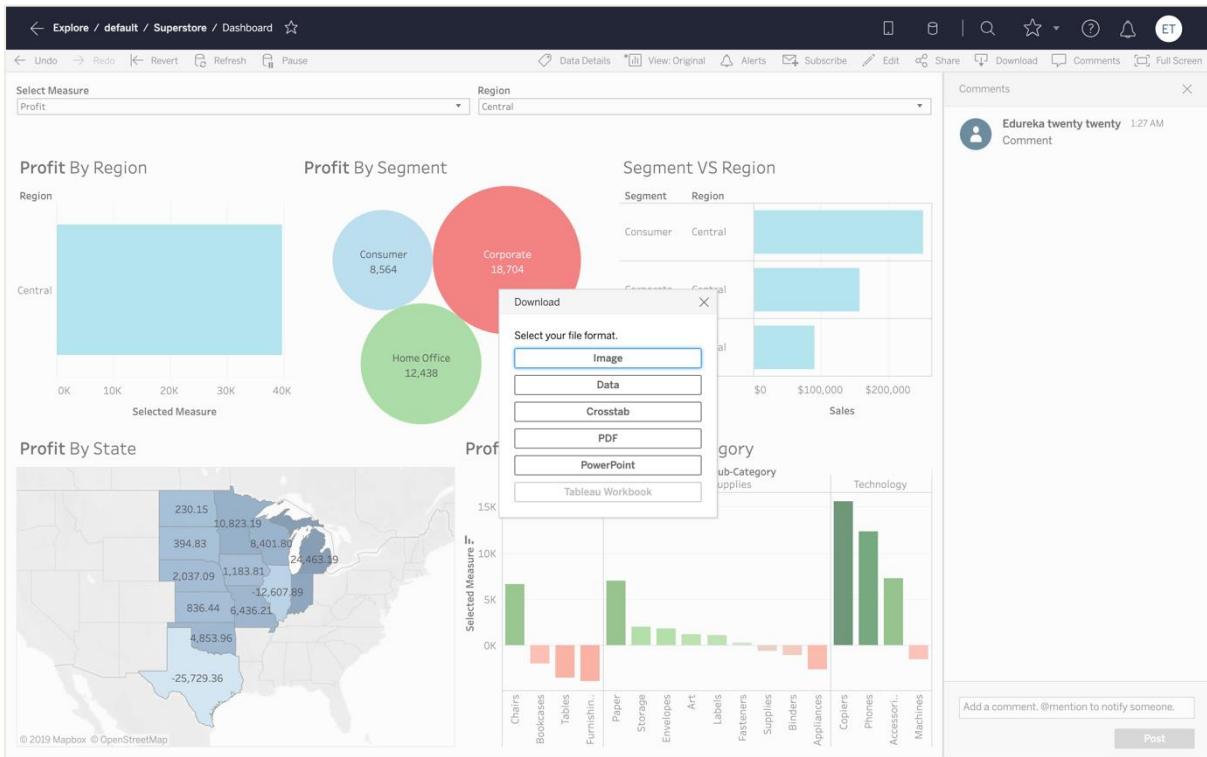
- Toggle between the current and original views.



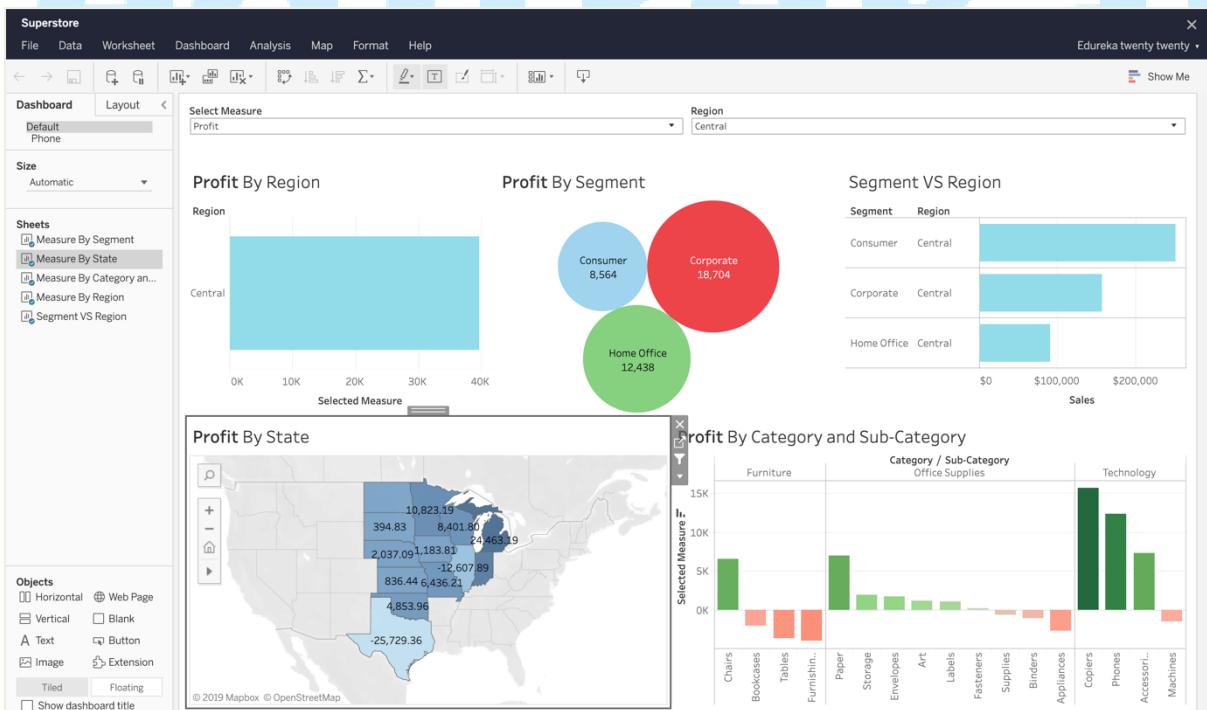
- Click on the “Comments” icon in order to add a comment and a snapshot of the view along with the comments.



- Click on the “Download” option in order to download as an Image, Data, Crosstab, PDF, and PowerPoint.

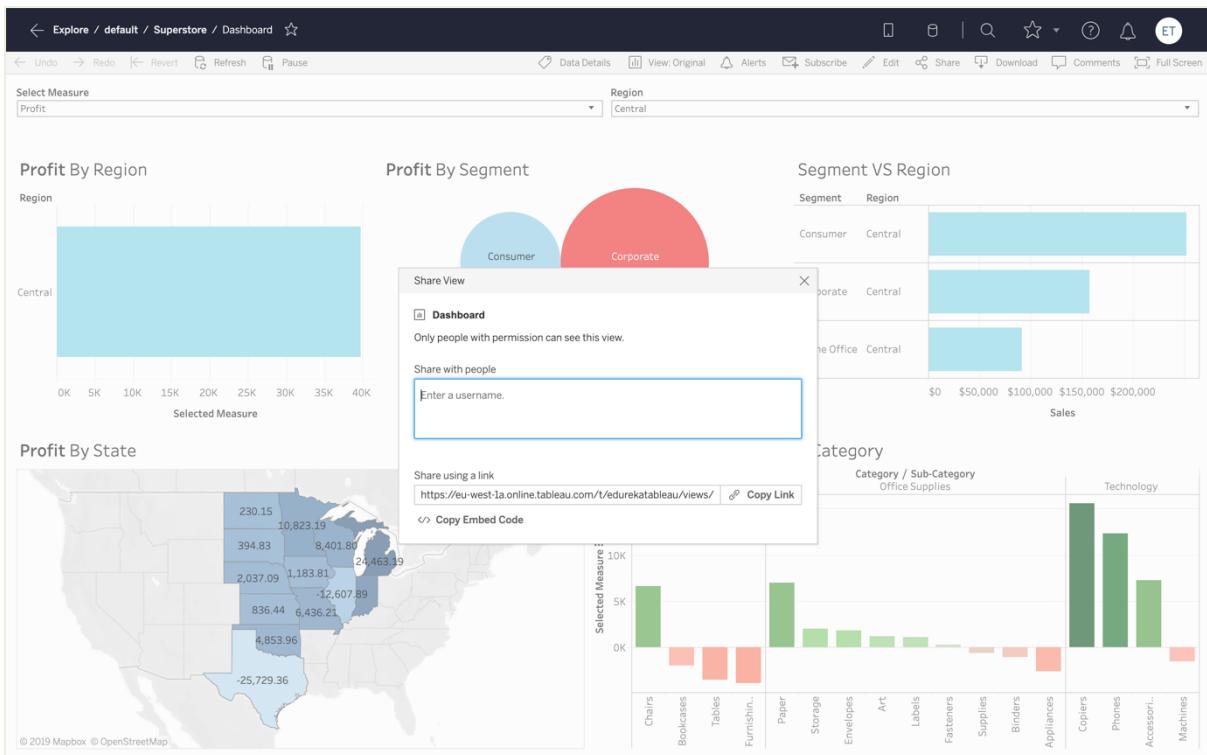


- Click on the “Edit” option for modifying the Dashboard.

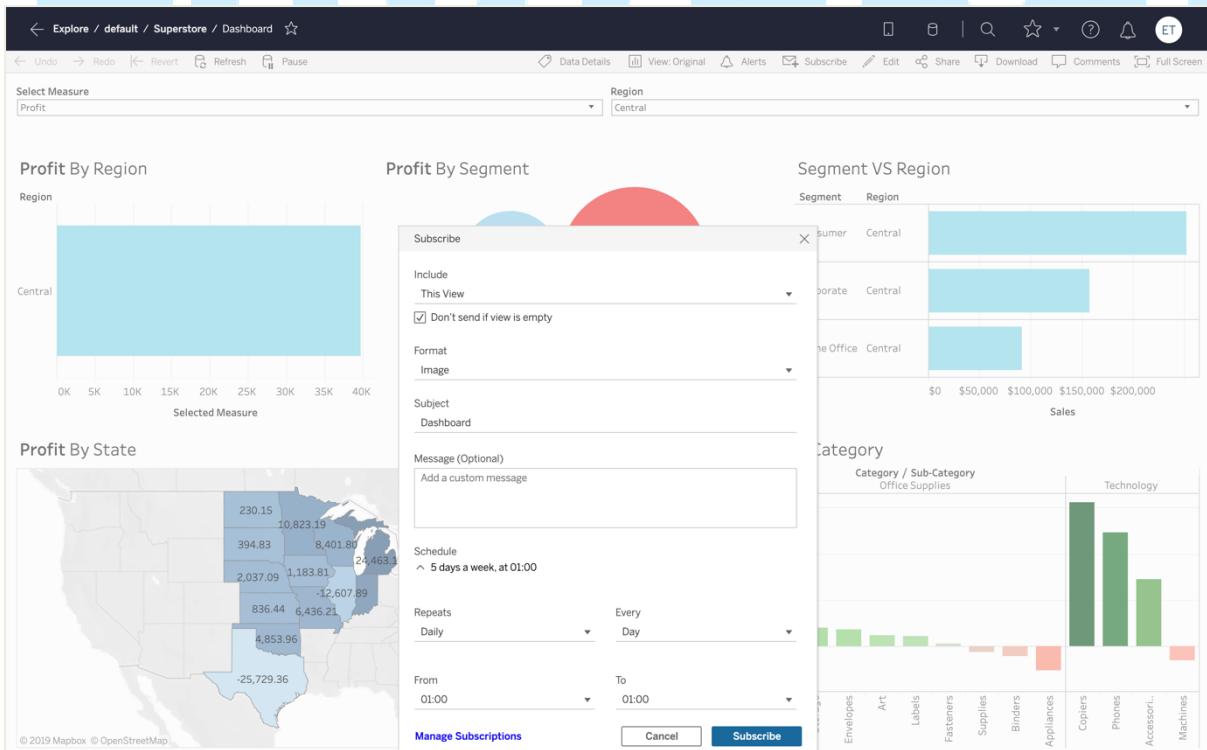


- Click on the “Share” option in order to share the Dashboard with other other users.

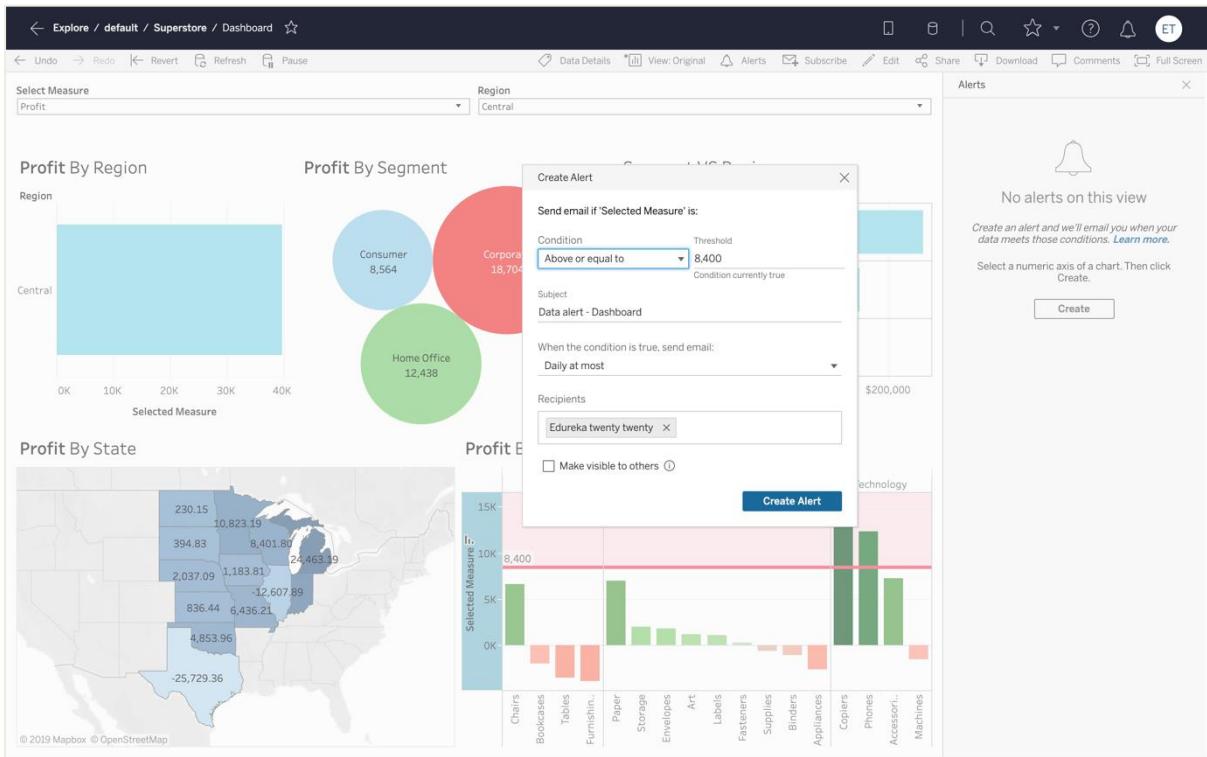
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- Click on the “Subscribe” option to receive notifications.

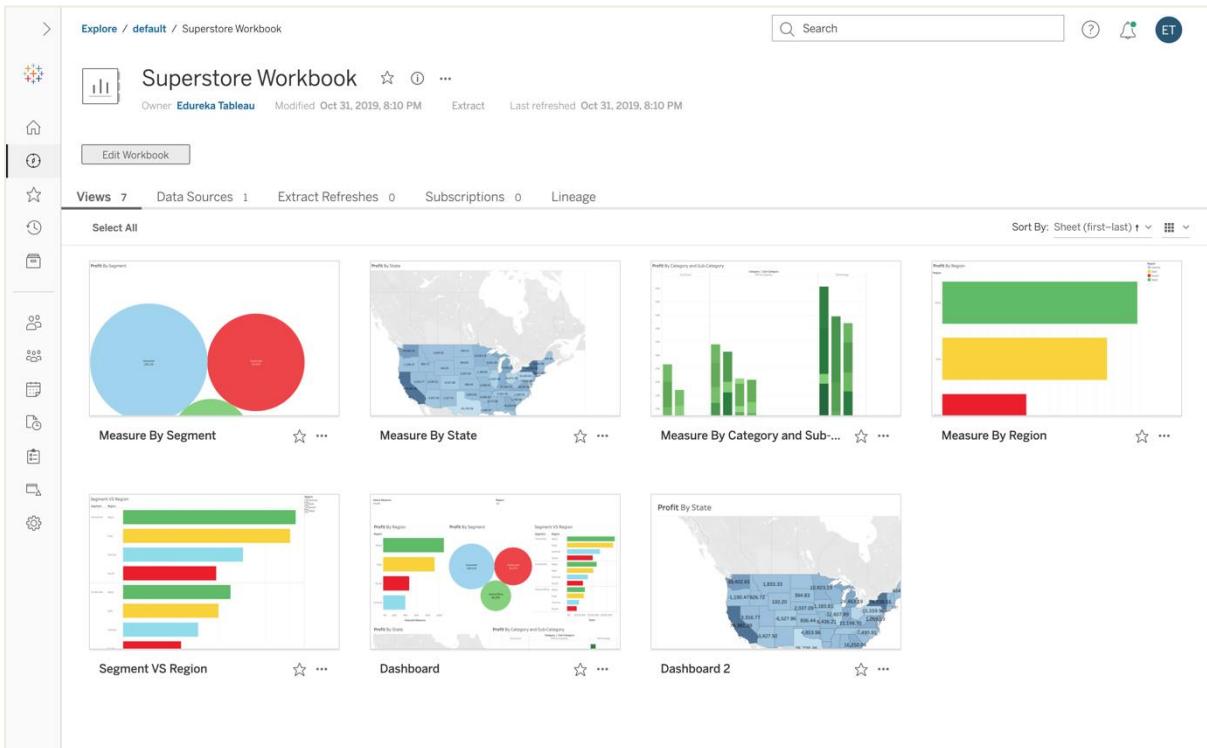


- Choose a numeric axis of a chart and Click on “Create”. Create an alert that notifies you via email when your data meets the specified conditions.

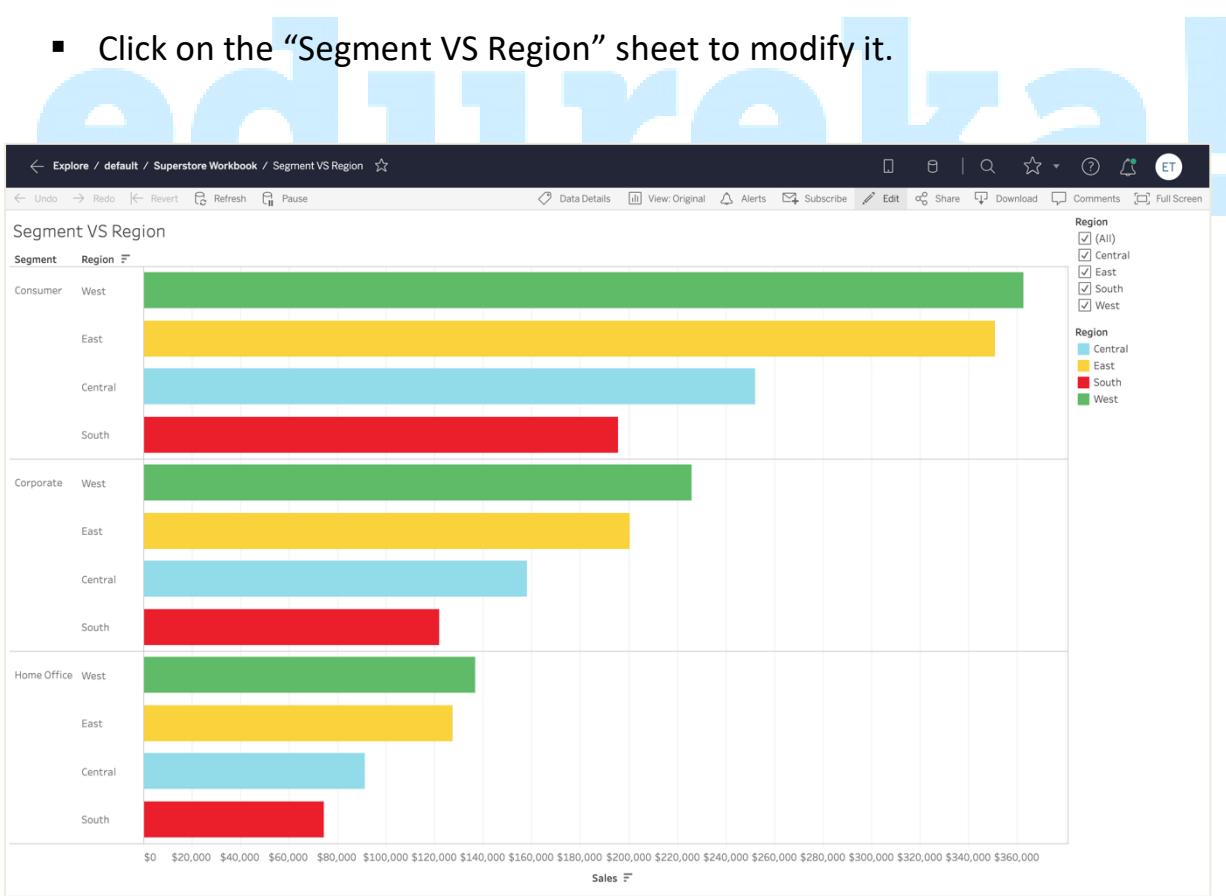


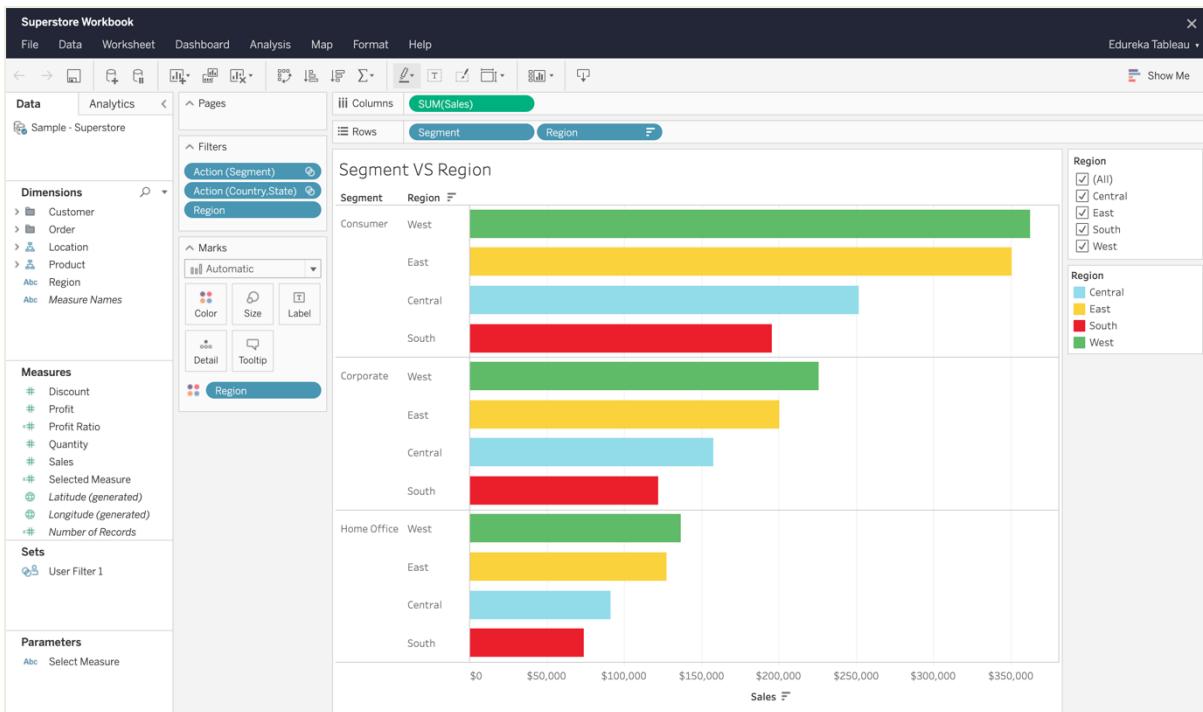
## Web Authoring:

- Login in to Tableau Online. Open a Workbook and click on the “Edit Workbook” button.

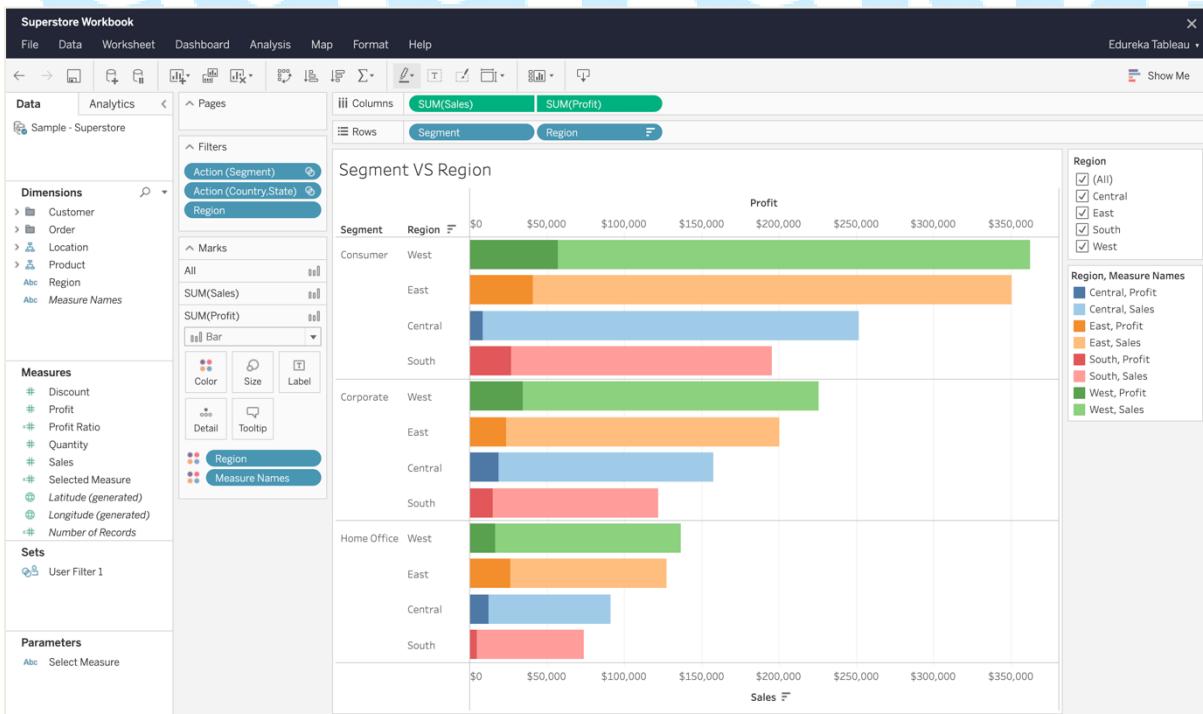


- Click on the “Segment VS Region” sheet to modify it.

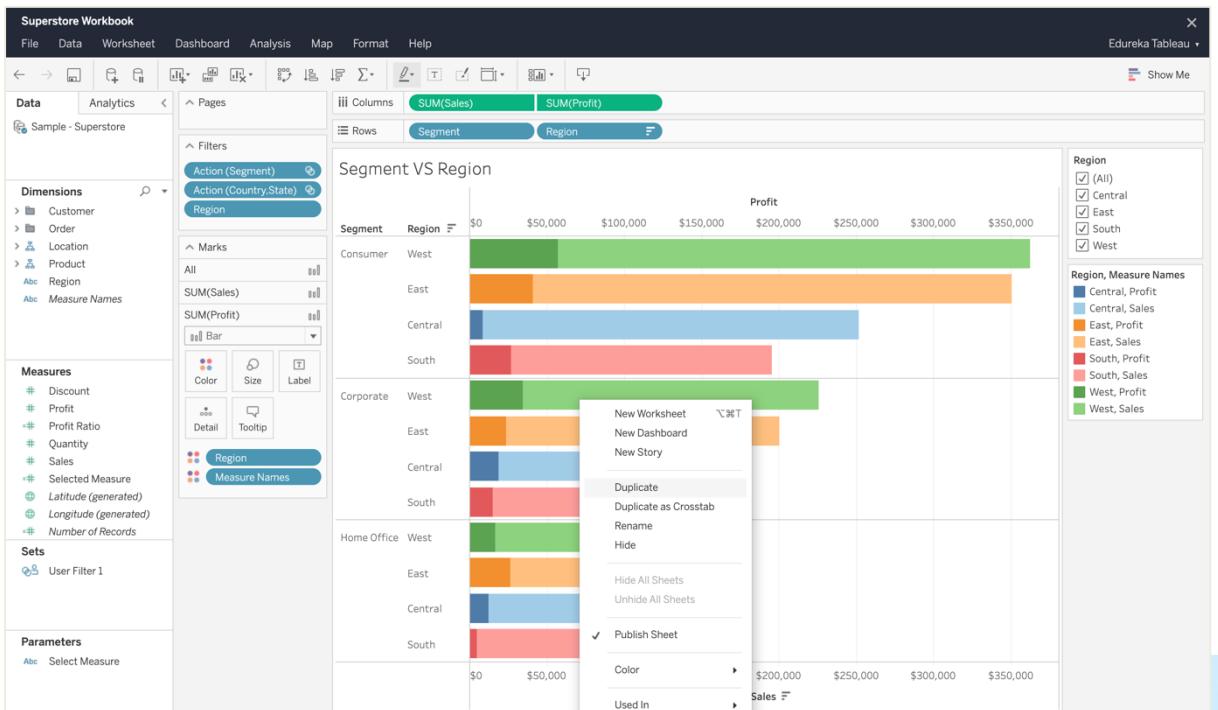




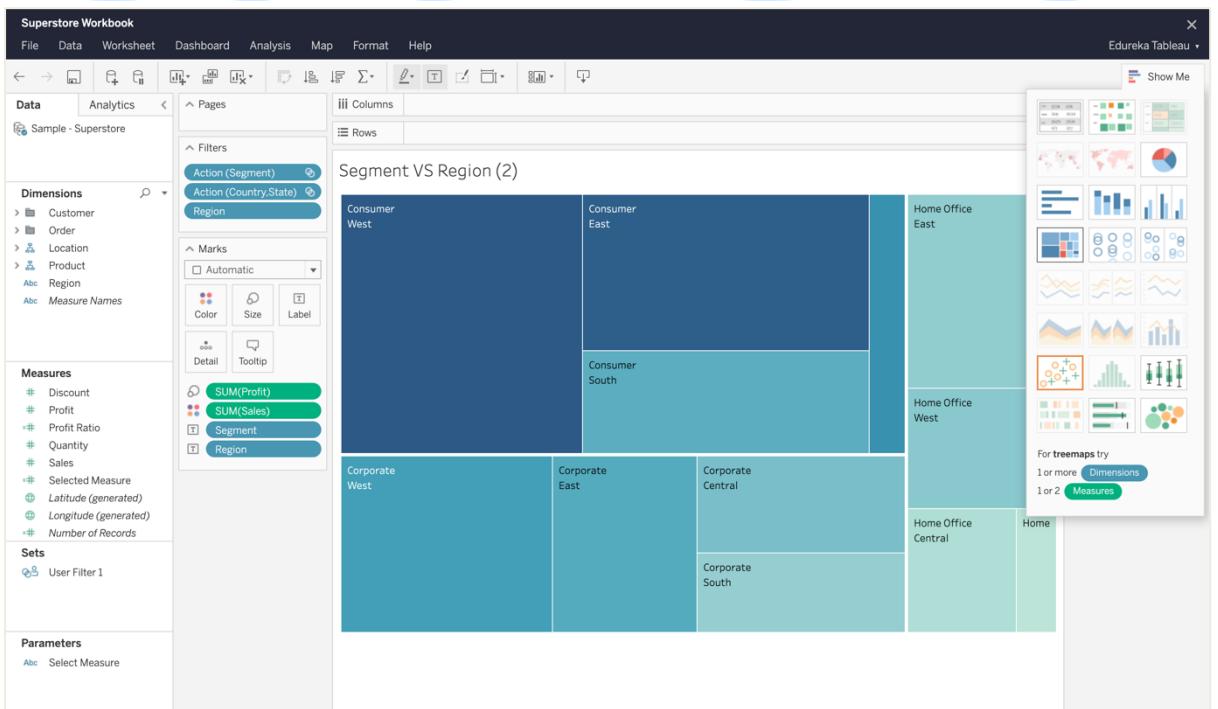
- Edit the sheet by making the desired changes.



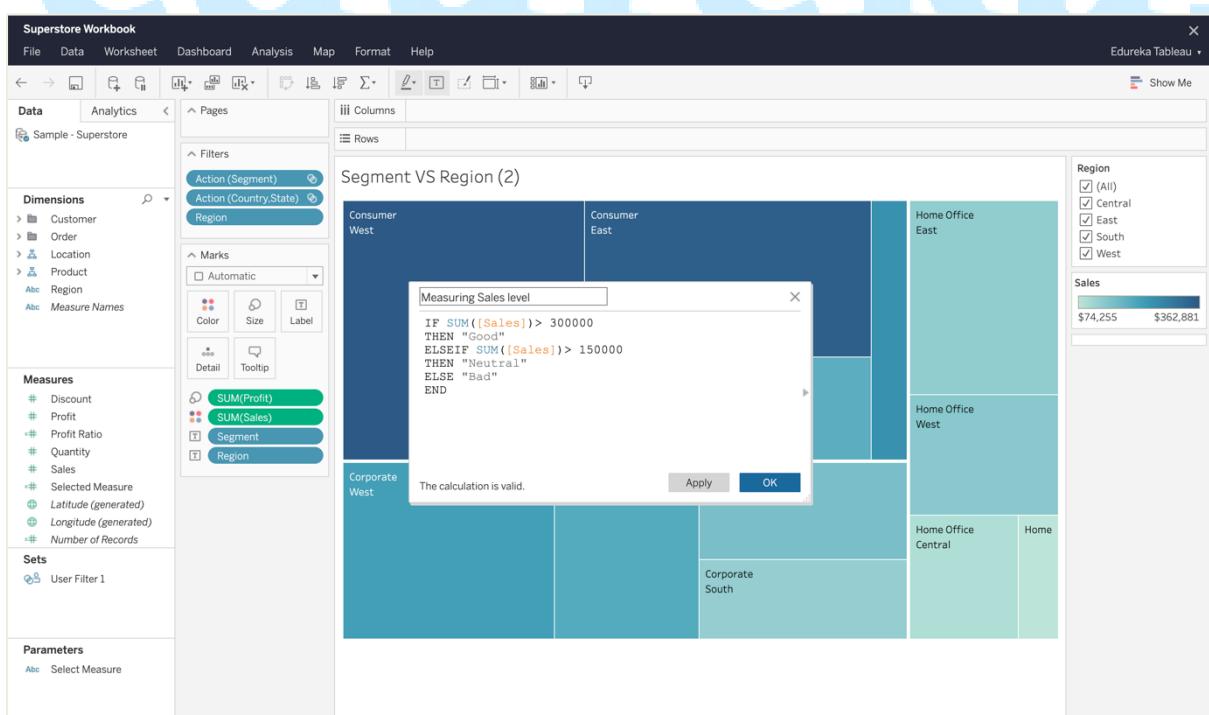
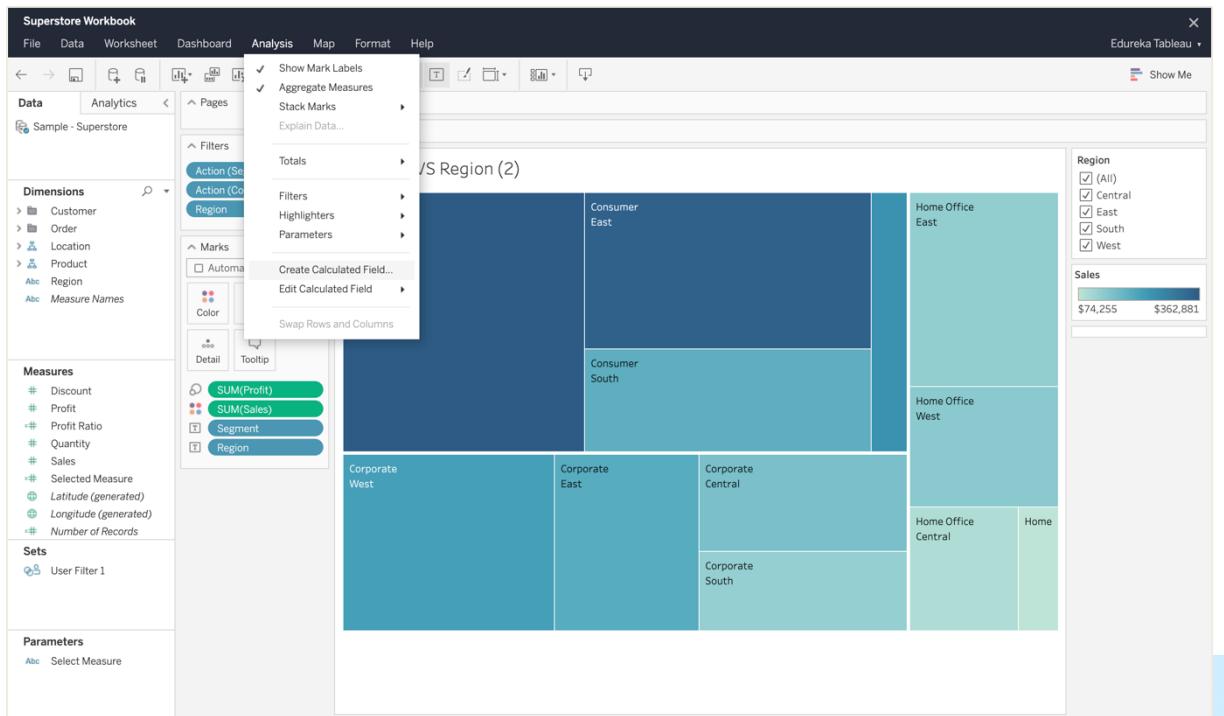
- Right-click on the Sheet and select the Duplicate option from the drop-down menu.



- Click on “Show Me” and select the desired visualization.

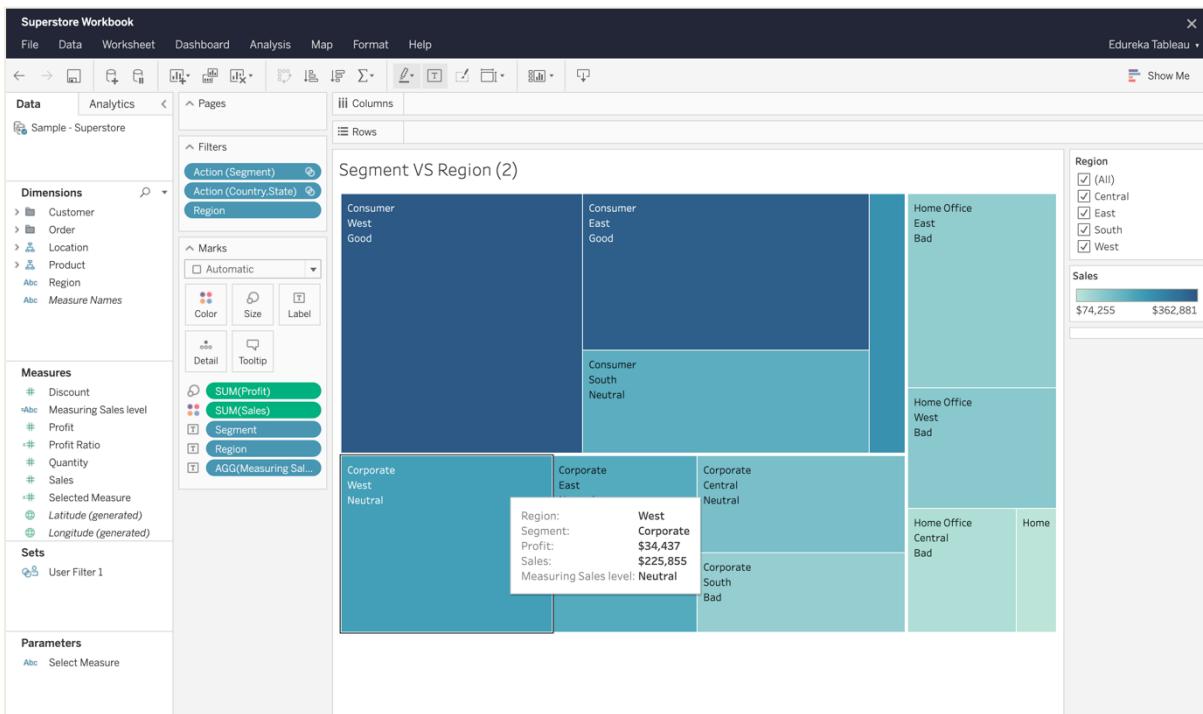


- Click on “Analysis” and select the “Create Calculated Field” from the drop-down menu.

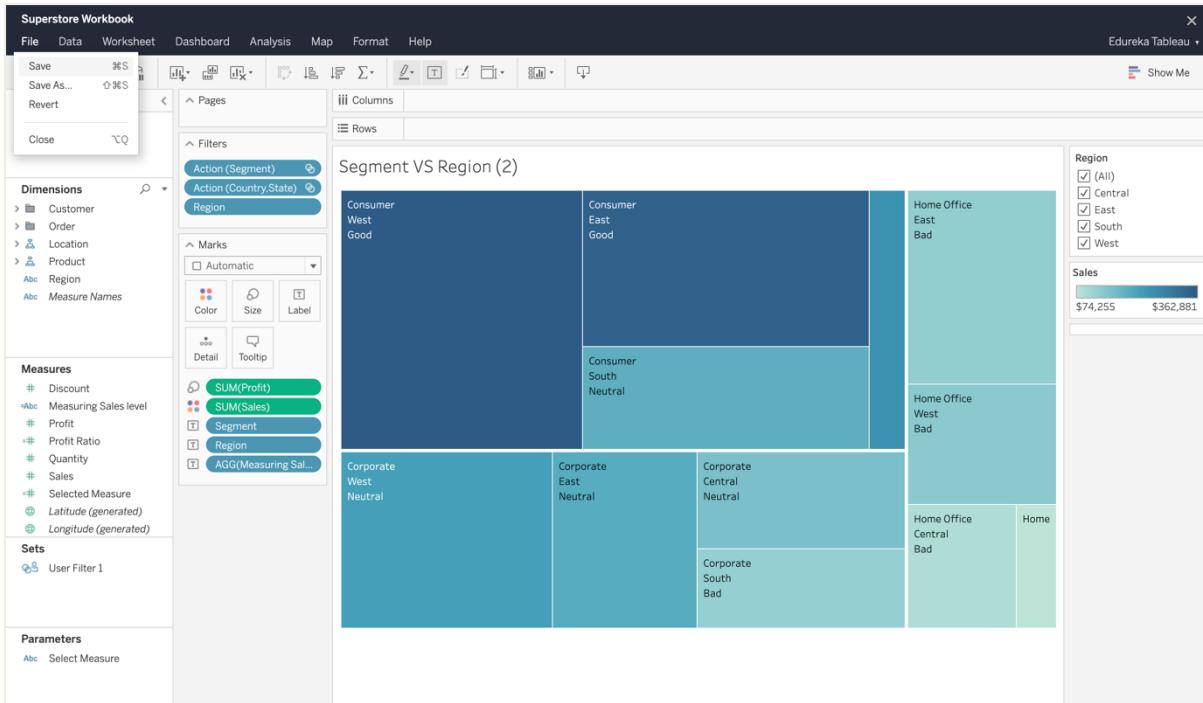


- Drag the newly created Calculated Field on to the View pane.

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■ Go to File->Save.



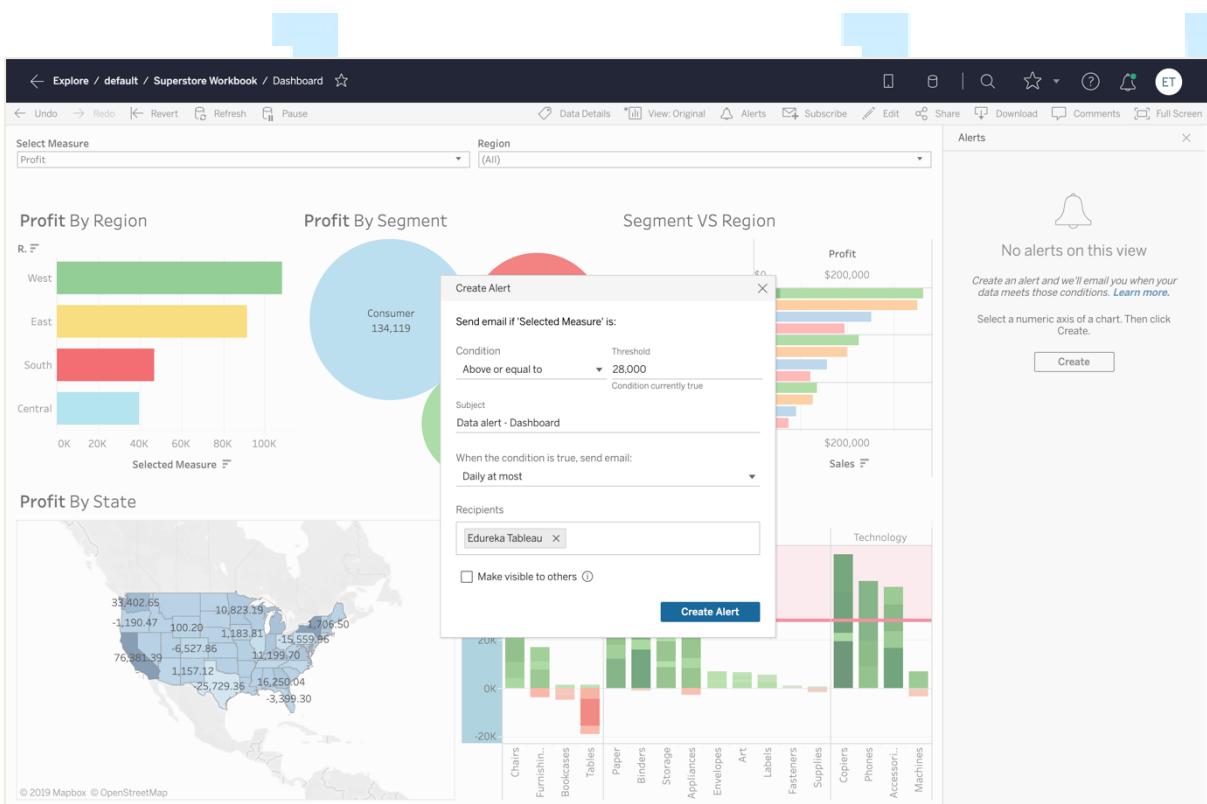
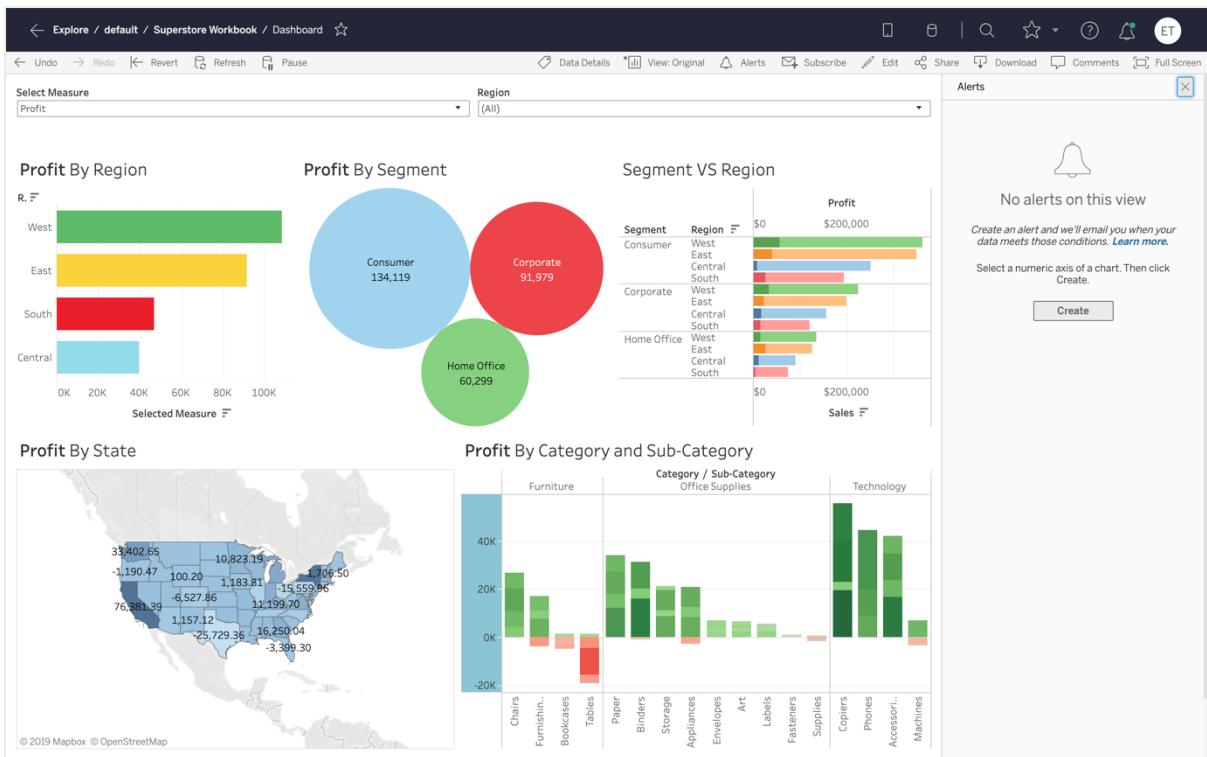
- Create a new workbook using published Data Sources.

The screenshot shows the Tableau Online interface. On the left is a sidebar with various icons for navigation. The main area is titled "Explore" and shows a list of data sources. A context menu is open over the "Sample Retail Data (Buyer-Persona-Case-Study)" data source, listing options like "New Workbook", "Share...", "Download", "Tag...", "Move...", "Permissions...", "Change Owner...", "Quality Warning...", "Edit Connection...", "Refresh Extracts...", and "Revision History...". Below this, a modal window titled "Sample Retail Data (Buyer-Persona-Case-Study)" is displayed. It has tabs for "Data", "Analysis", "Worksheet", "Dashboard", "Map", "Format", and "Help". The "Data" tab is selected. Inside the modal, there's a "Connect to Data" section with a search bar and a dropdown for "Content Type: Data Sources". Below this, there are tabs for "On This Site", "Files", and "Connectors". Under "On This Site", a table lists data sources: "Superstore Datasource" (2 Workbooks, Live, Sample - Superstore.xls, Samples, Edureka Tableau) and "Sample Retail Data (Buyer-Persona-Case-Study)" (2 Workbooks, Oct 22, 2019, 4:18 PM, Buyer-Persona-Case-Study.xls, default, Edureka Tableau). At the bottom of the modal are buttons for "Data Source", "Sheet 1", and "Connect".

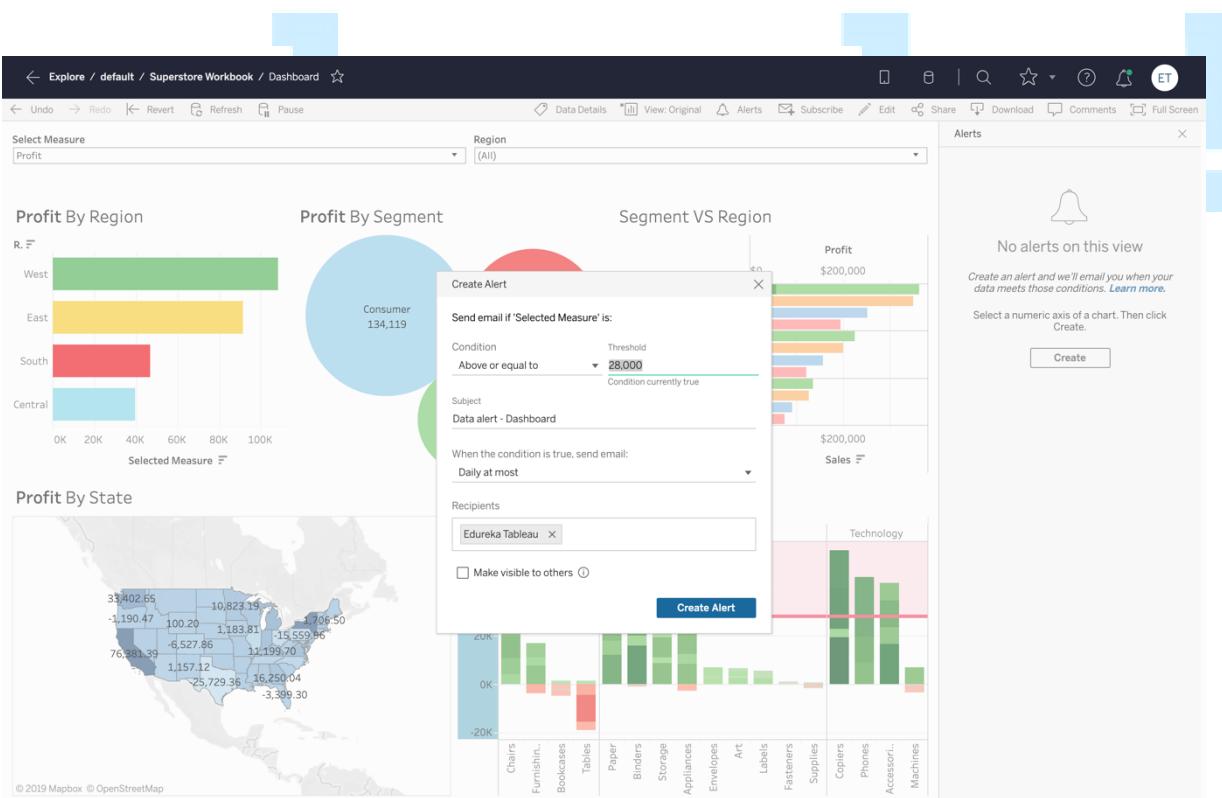
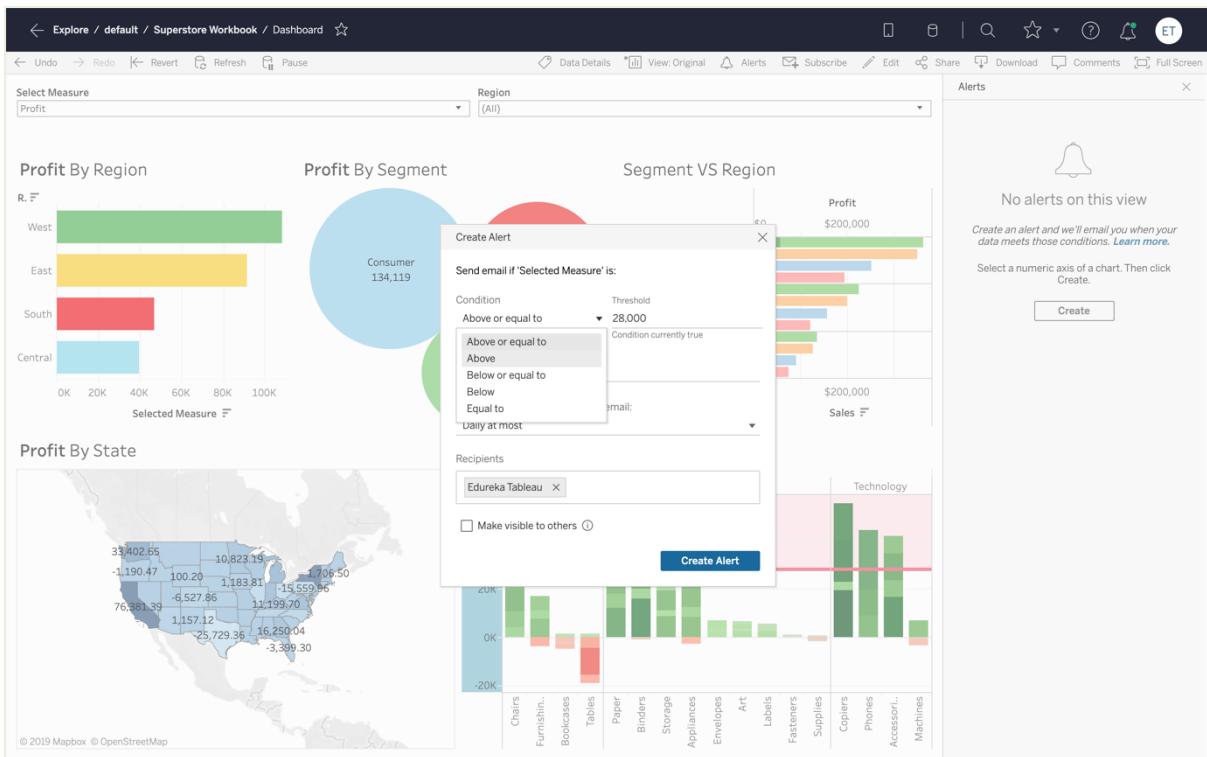
### Data-Driven Alerts

- Click on the “Create Alert” button in order to set up a conditional alert that will be received through an email.

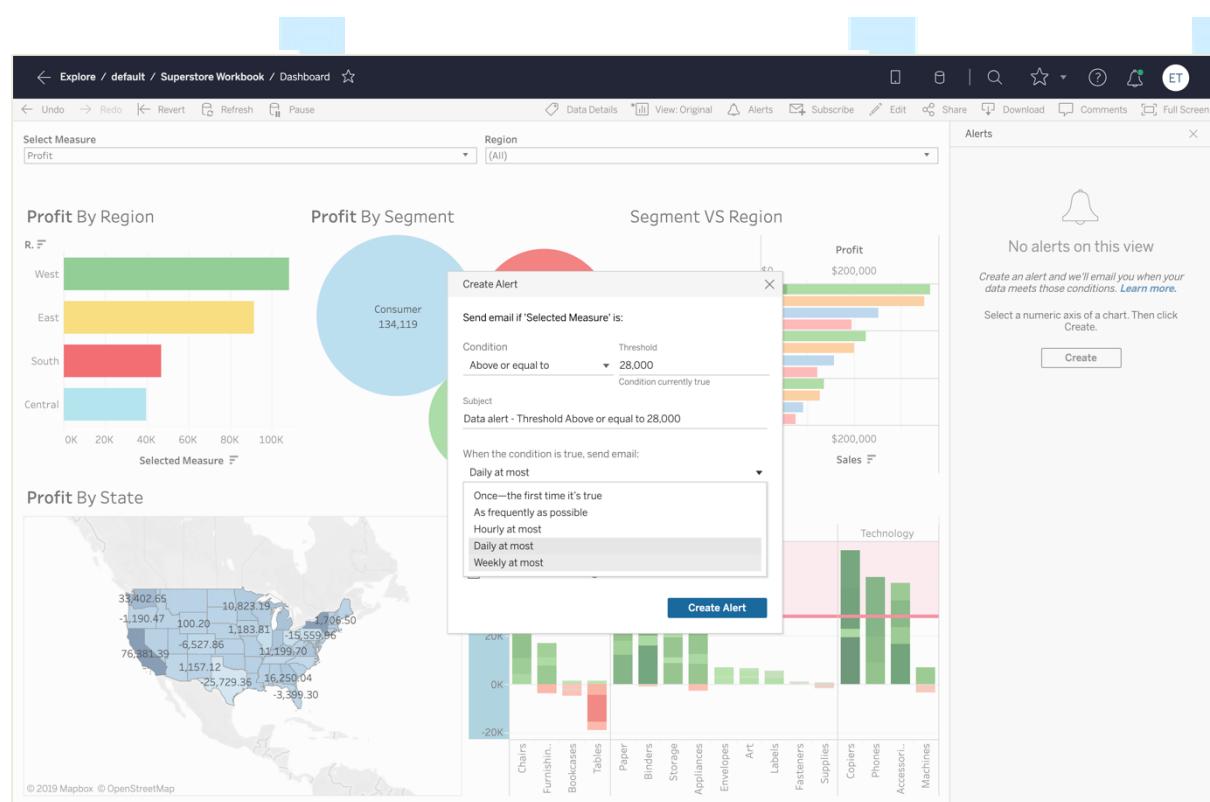
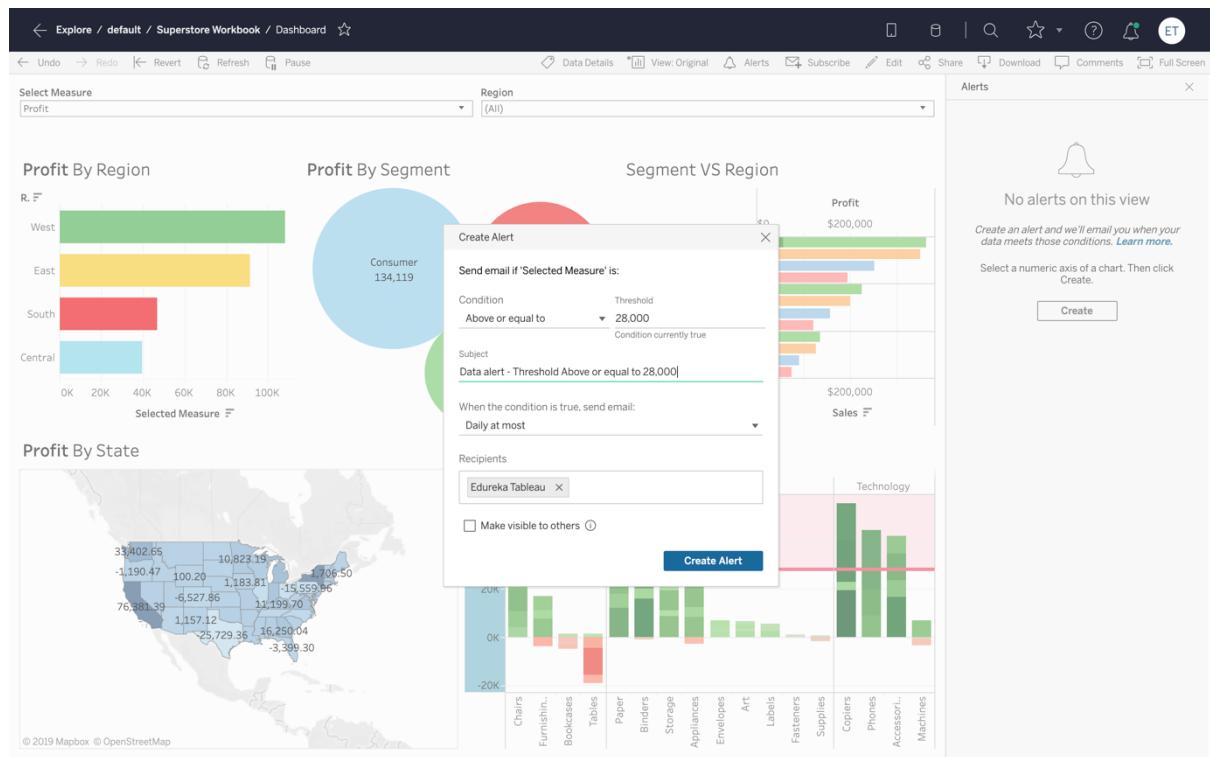
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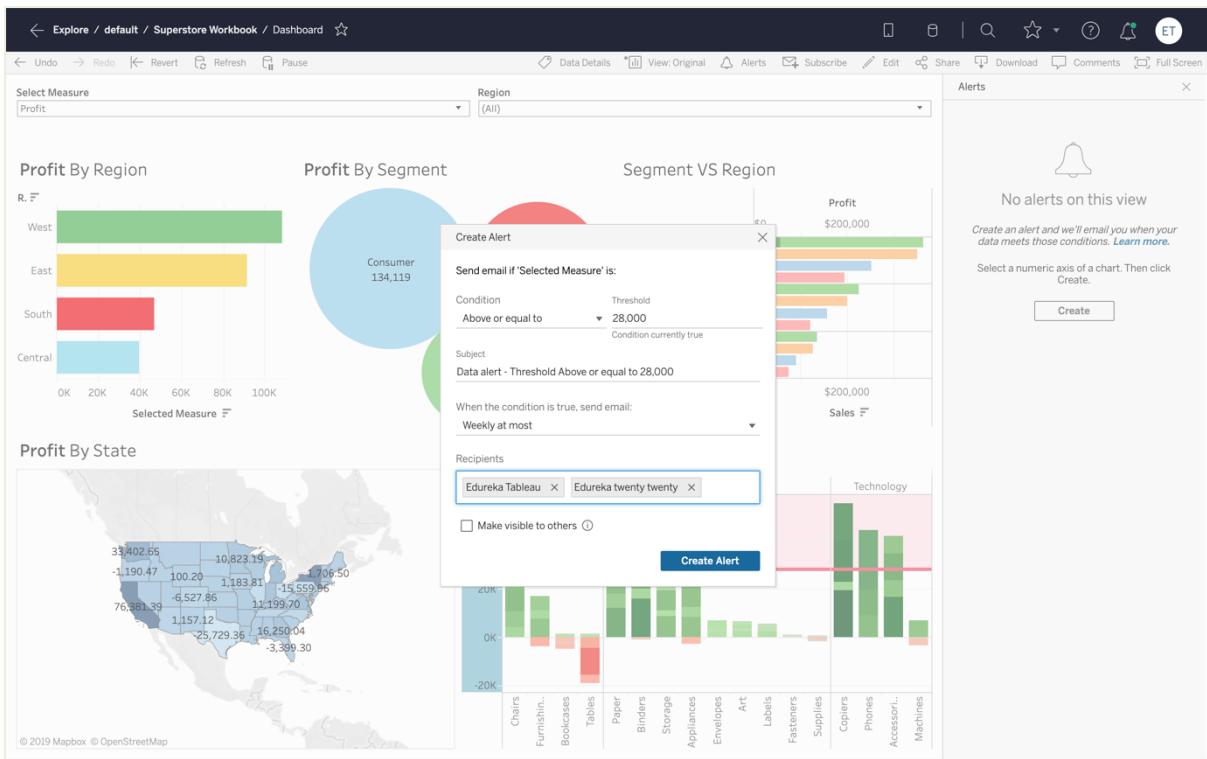
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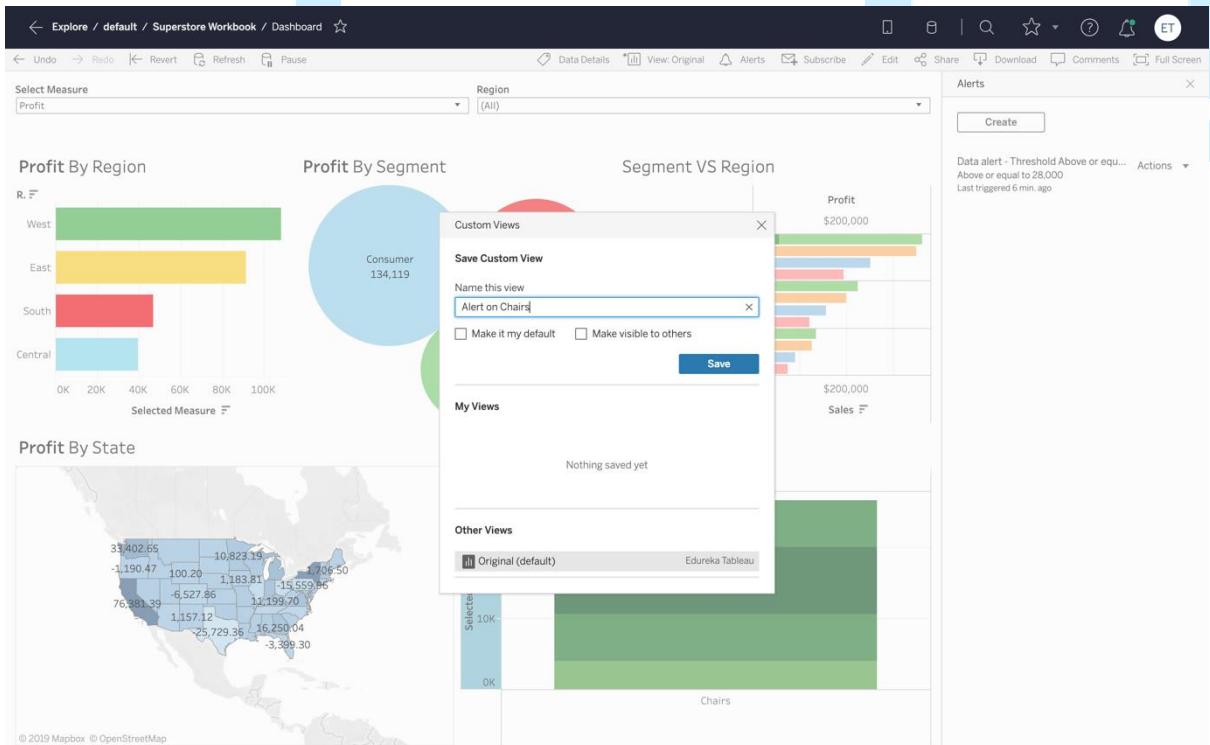
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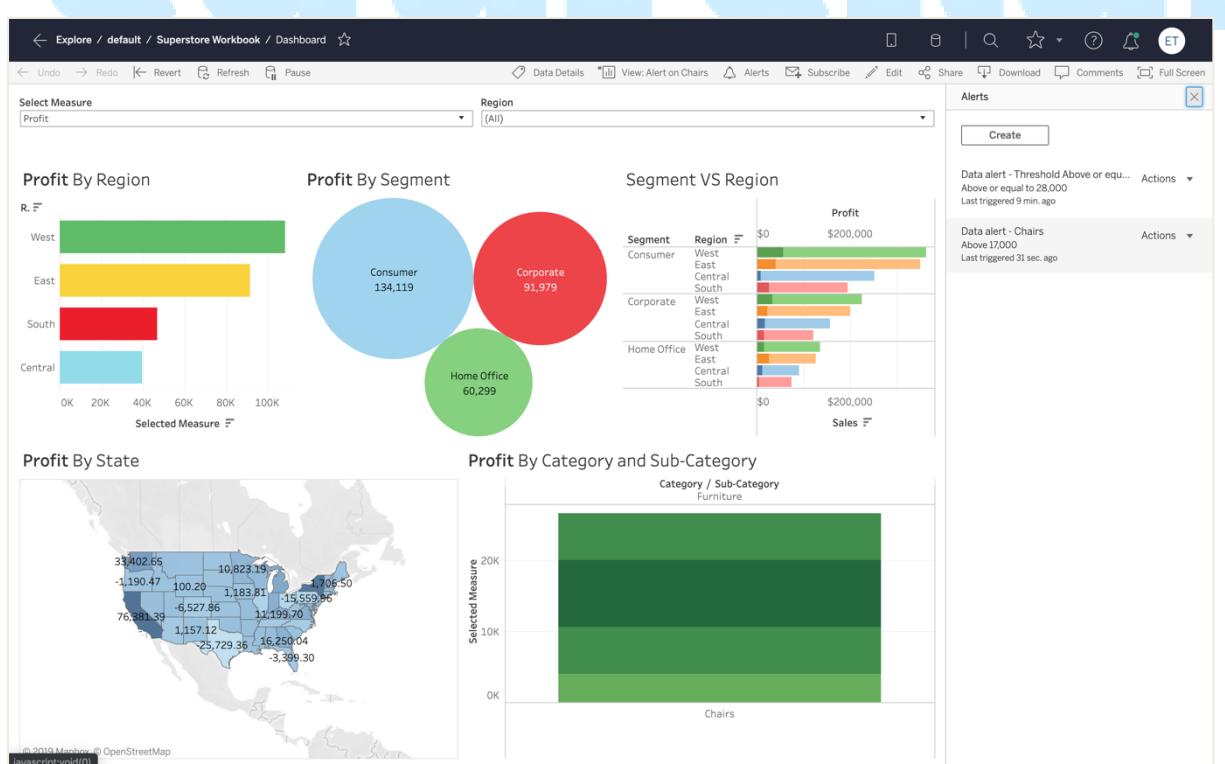
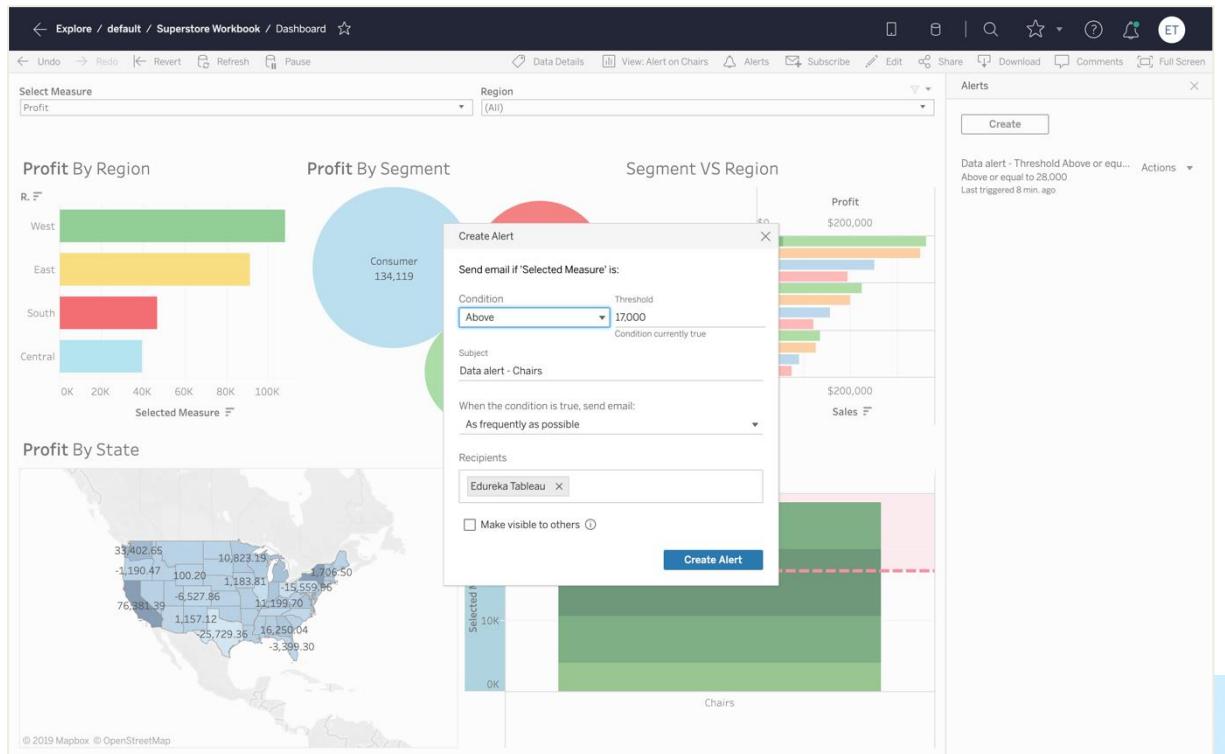
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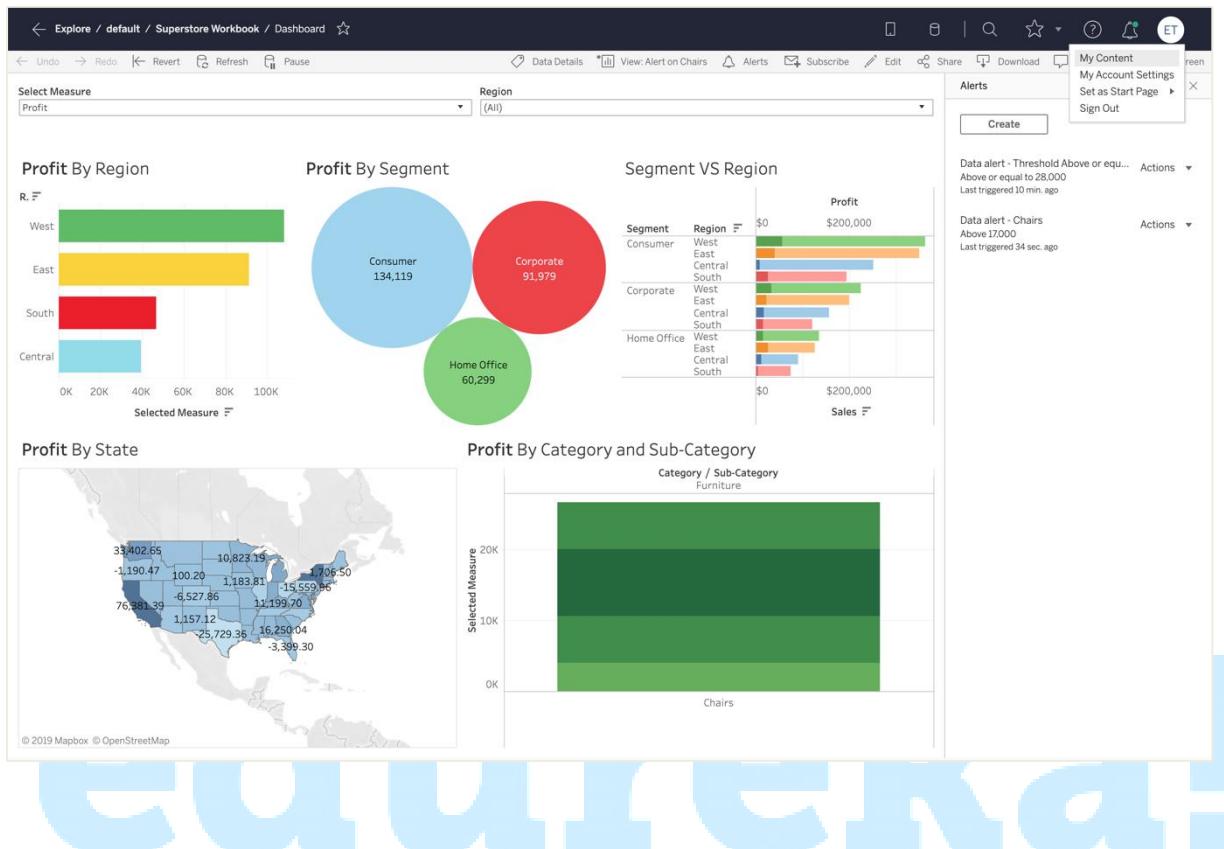
- Click on "View" in order to save this view.



- Create an Alert for the above view.



- Click on your account initials and select the “My Content” option from the drop-down menu.



The user interface includes:

- Header:** All Users / Edureka Tableau, Search bar, User info (external\edureka2019@gmail.com, Site role: Site Administrator Creator, Last sign in: Oct 31, 2019, 11:30 PM, edureka2019@gmail.com).
- Main Navigation:** Projects 1, Workbooks 12, Views 48, Data Sources 2, Flows 1, Alerts 3, Subscriptions 1, Settings.
- Project List:** New Project, Select All, Sort By: Name (a-z) ↑, Projects 1, Workbooks 12, Views 48, Data sources 2, Created.
- Sample Projects:** Samples, ... 0 2 15 1 Oct 22, 2019, 4:15 PM.
- Left Sidebar:** Home, Projects, Workbooks, Views, Data Sources, Flows, Alerts, Subscriptions, Settings, Logout.

- Click on “Alerts” and observe the various alerts.

The screenshot shows the Tableau Online interface with the following details:

- Header:** All Users / Edureka Tableau, Search bar, Help icon, Notifications icon, ET icon.
- User Information:** User: external\edureka2019@gmail.com, Site role: Site Administrator Creator, Last sign in: Oct 31, 2019, 11:30 PM, edureka2019@gmail.com.
- Navigation:** Projects 1, Workbooks 12, Views 48, Data Sources 2, Flows 1, **Alerts 3** (highlighted), Subscriptions 1, Settings.
- Table Headers:** Select All, Subject, Owner, View, Recipients, Visible to, Email sent, Last checked, Your last alert.
- Data Rows:**
  - Data alert - Buyers Persona: Owner Edureka Tableau, View Buyers Persona, Recipients Edureka Tableau +1, Visible to Daily at most, Email sent Nov 1, 2019, 2:11 AM, Last checked Nov 1, 2019, 8:51 PM.
  - Data alert - Chairs: Owner Edureka Tableau, View Alert on Chairs, Recipients Edureka Tableau, Visible to Frequently, Email sent Nov 1, 2019, 2:46 AM, Last checked Nov 1, 2019, 2:46 AM.
  - Data alert - Threshold Above or equal to 28...: Owner Edureka Tableau, View Dashboard\*, Recipients Edureka Tableau +1, Visible to Weekly at most, Email sent Nov 1, 2019, 2:38 AM, Last checked Nov 1, 2019, 2:38 AM.

- You can edit, remove or modify Alerts.

The screenshot shows the Tableau Online interface with the following details:

- Header:** All Users / Edureka Tableau, Search bar, Help icon, Notifications icon, ET icon.
- User Information:** User: external\edureka2019@gmail.com, Site role: Site Administrator Creator, Last sign in: Oct 31, 2019, 11:30 PM, edureka2019@gmail.com.
- Navigation:** Projects 1, Workbooks 12, Views 48, Data Sources 2, Flows 1, **Alerts 3** (highlighted), Subscriptions 1, Settings.
- Table Headers:** Select All, Subject, Owner, View, Recipients, Visible to, Email sent, Last checked, Your last alert.
- Data Rows:**
  - Data alert - Buyers Persona: Owner Edureka Tableau, View Buyers Persona, Recipients Edureka Tableau +1, Visible to Daily at most, Email sent Nov 1, 2019, 2:11 AM, Last checked Nov 1, 2019, 8:51 PM.
  - Data alert - Chairs: Owner Edureka Tableau, View Alert on Chairs, Recipients Edureka Tableau, Visible to Frequently, Email sent Nov 1, 2019, 2:46 AM, Last checked Nov 1, 2019, 2:46 AM.
  - Data alert - Threshold Above or equal to 28...: Owner Edureka Tableau, View Dashboard\*, Recipients Edureka Tableau +1, Visible to Weekly at most, Email sent Nov 1, 2019, 2:38 AM, Last checked Nov 1, 2019, 2:38 AM.
- Context Menu:** A context menu is open over the third row (Threshold Alert). It includes options: Add Me..., Remove Me..., Edit Alert..., Change Owner..., and Delete... (with a red box highlighting it).

## Ask Data

- Navigate to the “Superstore” Data Source.

The screenshot shows the Tableau Online interface with the 'Samples' project selected. The sidebar on the left has icons for Home, Help, Favorites, Recent, Dashboards, Workbooks, and Settings. The main area displays a list of items under 'Samples' owned by 'Edureka Tableau'. The items are listed by Type (checkbox) and Name. The 'Superstore Datasource' is highlighted. The bottom status bar shows the URL: <https://eu-west-1a.online.tableau.com/#/site/edurekatableau/explore/datasource/2618107>.

- Navigate to “Ask Data”.

The screenshot shows the 'Ask Data' interface for the 'Superstore Datasource'. The sidebar on the left includes icons for Home, Help, Favorites, Recent, Dashboards, Workbooks, and Settings. The main area has tabs for 'Ask Data', 'Connections 1', 'Connected Workbooks 2', and 'Lineage'. A message 'Analysis complete' with a refresh button is shown. A search bar is at the top right. Below it is a 'Questions To Ask' section with a 'Learn More' link. Underneath are several questions with dropdown menus for 'Basic Data Analysis' and 'Date and Time'. The sidebar on the left lists various data fields such as Customer Name, Location, Sales, Profit, and Profit Ratio. At the bottom right are 'Feedback' and 'Usage Analytics' buttons.

- Hover over the Dimensions or Measures.

Superstore Datasource

Owner Edureka Tableau

Ask Data

Analysis complete Refresh

Customer Name

Location

Country

State

City

Postal Code

Order Date

Order ID

Product

Category

Sub-Category

Manufacturer

Product Name

Profit (bin)

Region

Segment

Ship Date

Ship Mode

Details

String

3 unique values

Domain Values

Office Supplies

Furniture

Technology

Date and Time

Filters

Viz Type

- Type a question to ask.

Explore / Samples / Superstore Datasource

Superstore Datasource

Owner Edureka Tableau

Ask Data

Analysis complete Refresh

Customer Name

Location

Country

State

City

Postal Code

Order Date

Order ID

Product

Category

Sub-Category

Manufacturer

Product Name

Profit (bin)

Region

Segment

Ship Date

Ship Mode

Discount

Number of Records

Profit

Profit Ratio

Quantity

Sales

Sum of Profit in California

sum of Profit with State in California

Questions To Ask

Basic Data Analysis

sum of Sales

by State

Sales at least \$0.44

sort State in alphabetical order

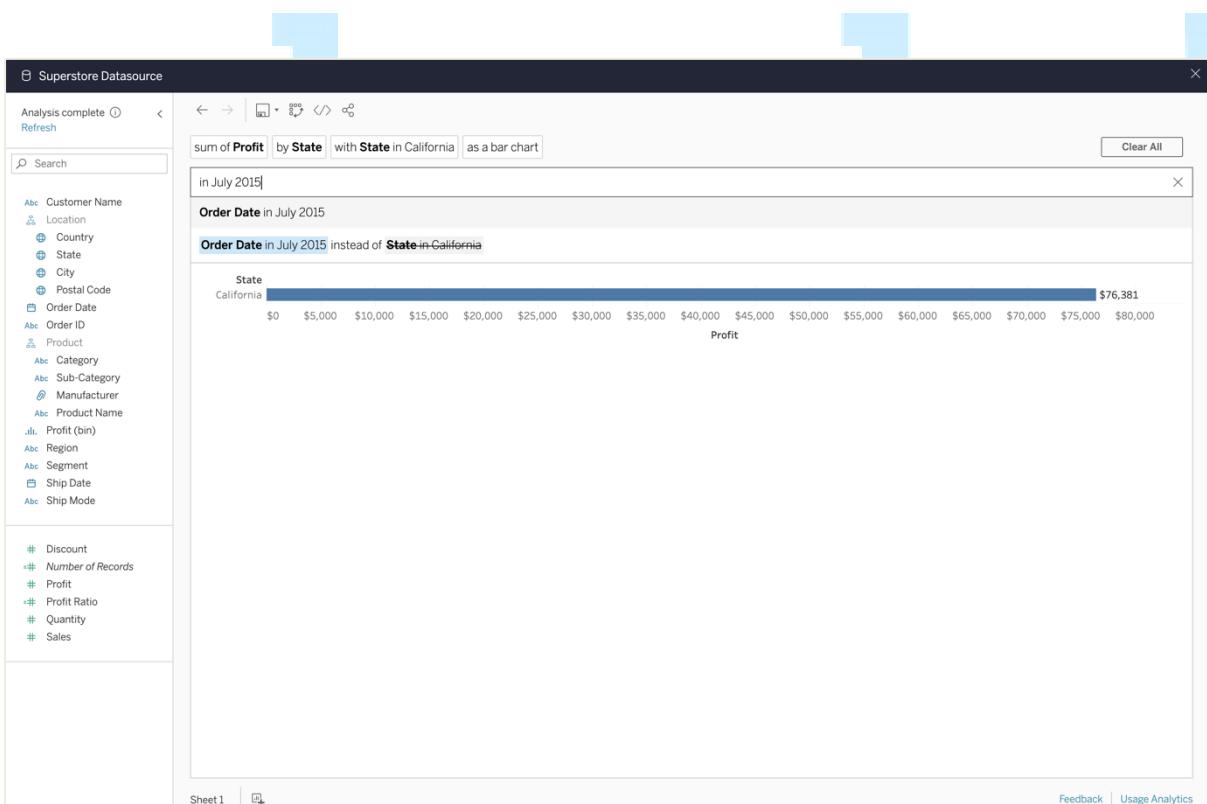
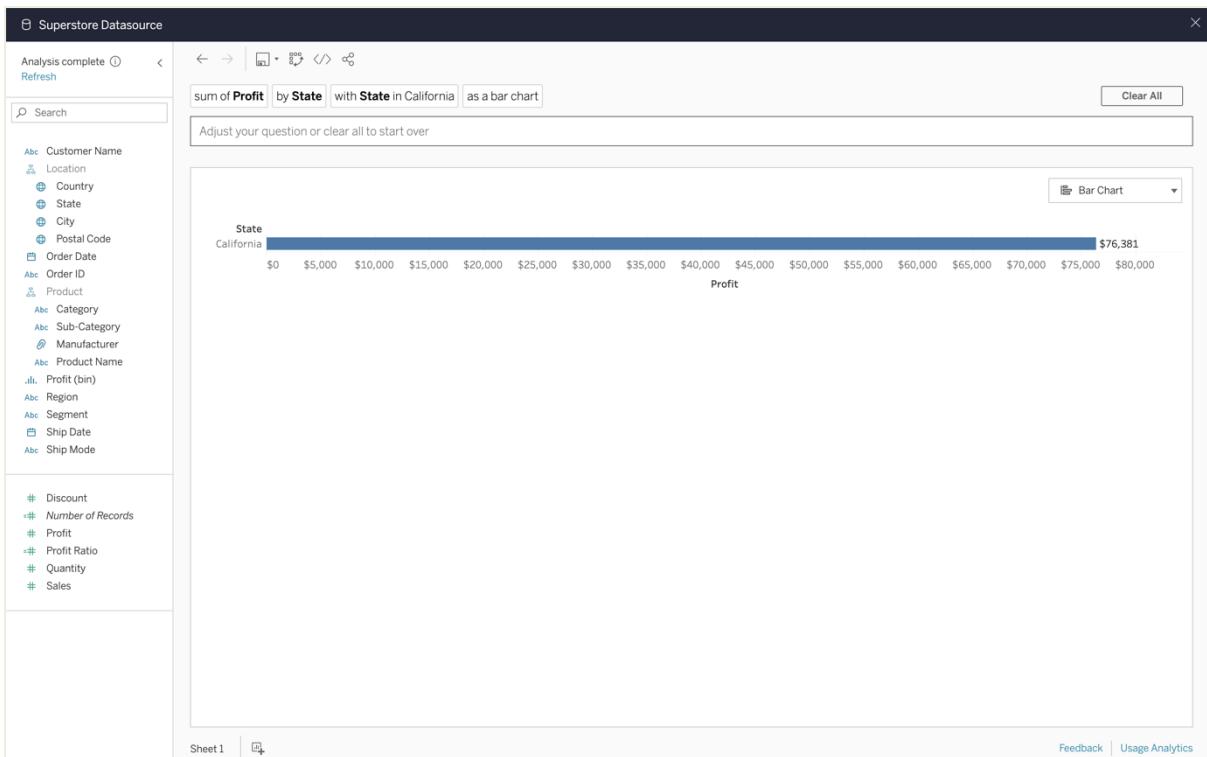
top State by sum of Number of Records

Date and Time

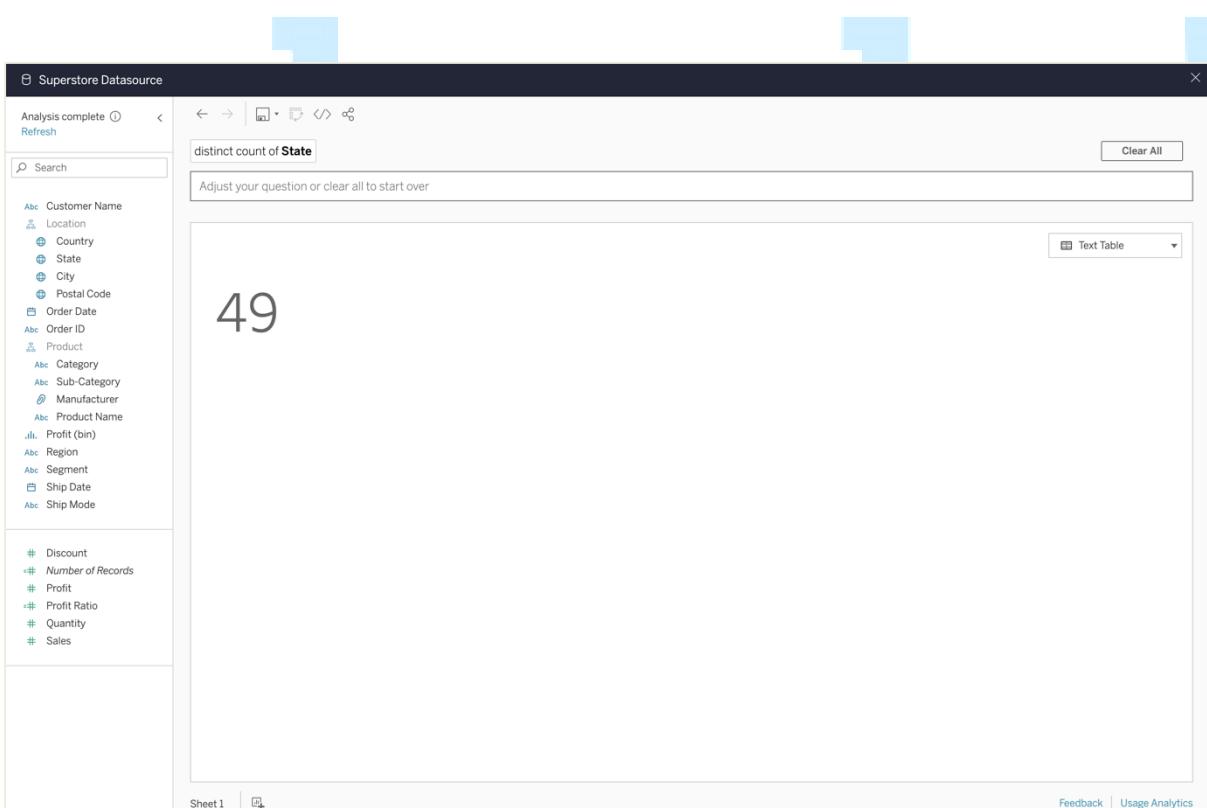
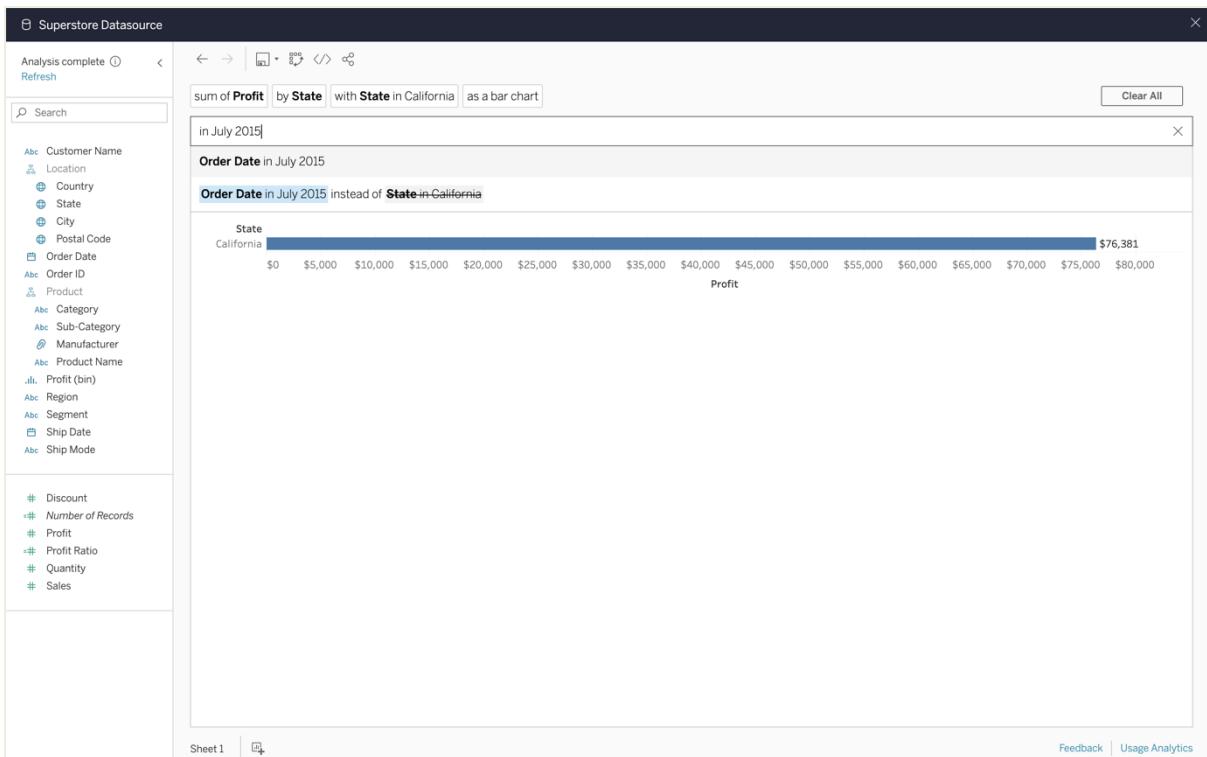
Filters

Viz Type

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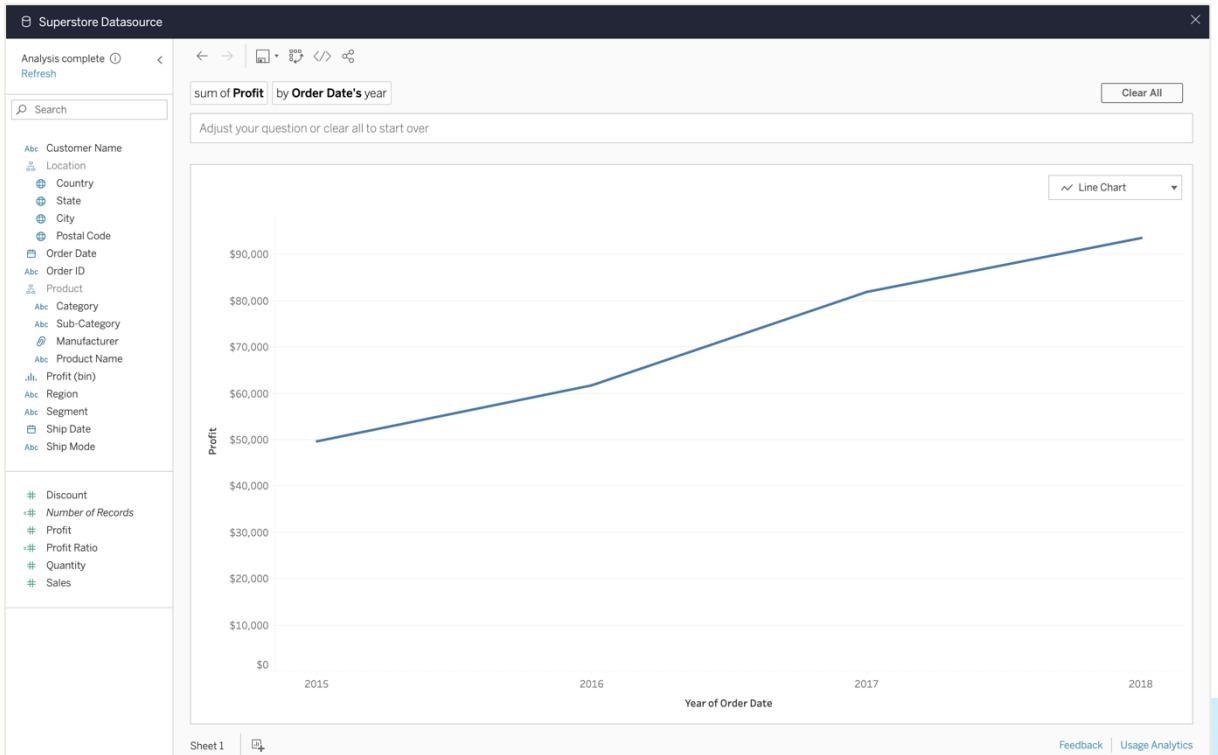


- Change the aggregation to Count.

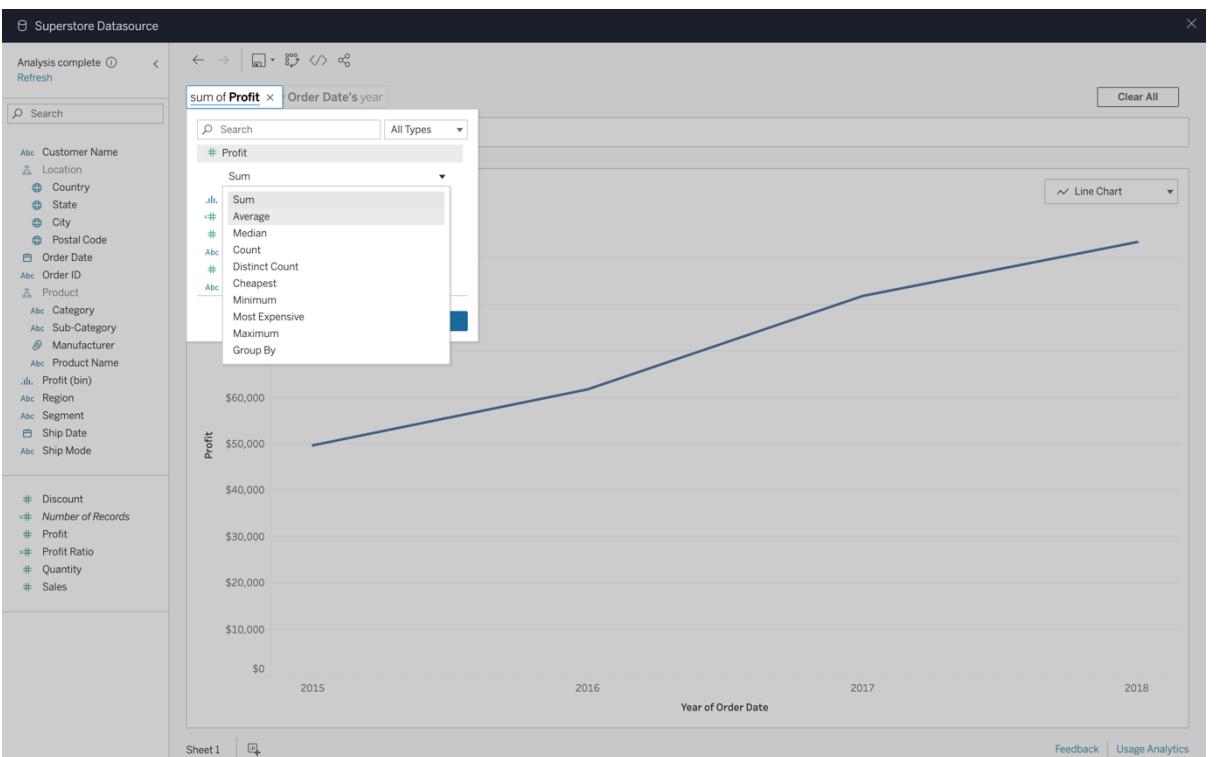
The screenshot shows the Tableau Online interface for the Superstore Datasource. In the top search bar, 'distinct count of State' is entered. Below the search bar, the 'State' dimension is selected in the 'Search' dropdown. A dropdown menu for aggregation is open, showing 'Distinct Count' (which is highlighted) and 'Count'. The main canvas displays the value '9,994'.

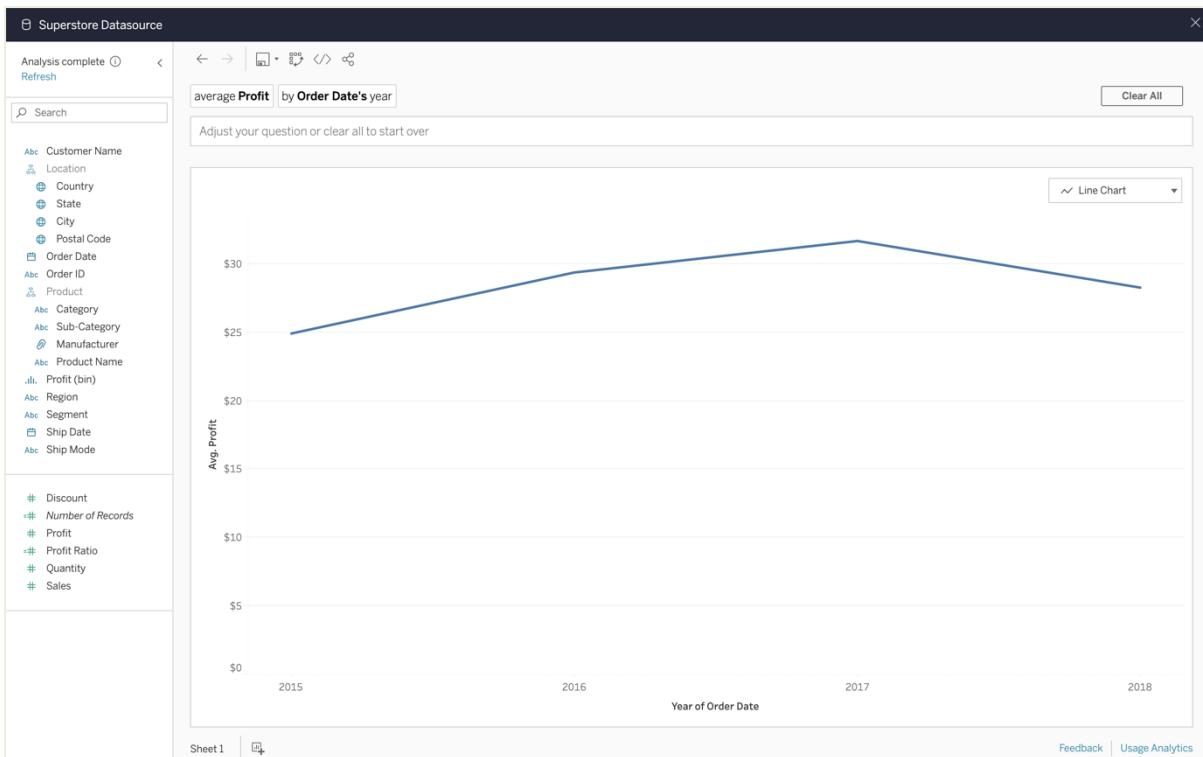
This screenshot is identical to the one above, showing the same steps in the Tableau Online interface. The aggregation for 'State' has been changed to 'Count', and the value '9,994' is now displayed on the canvas.

- Sum of Profit over the Years.

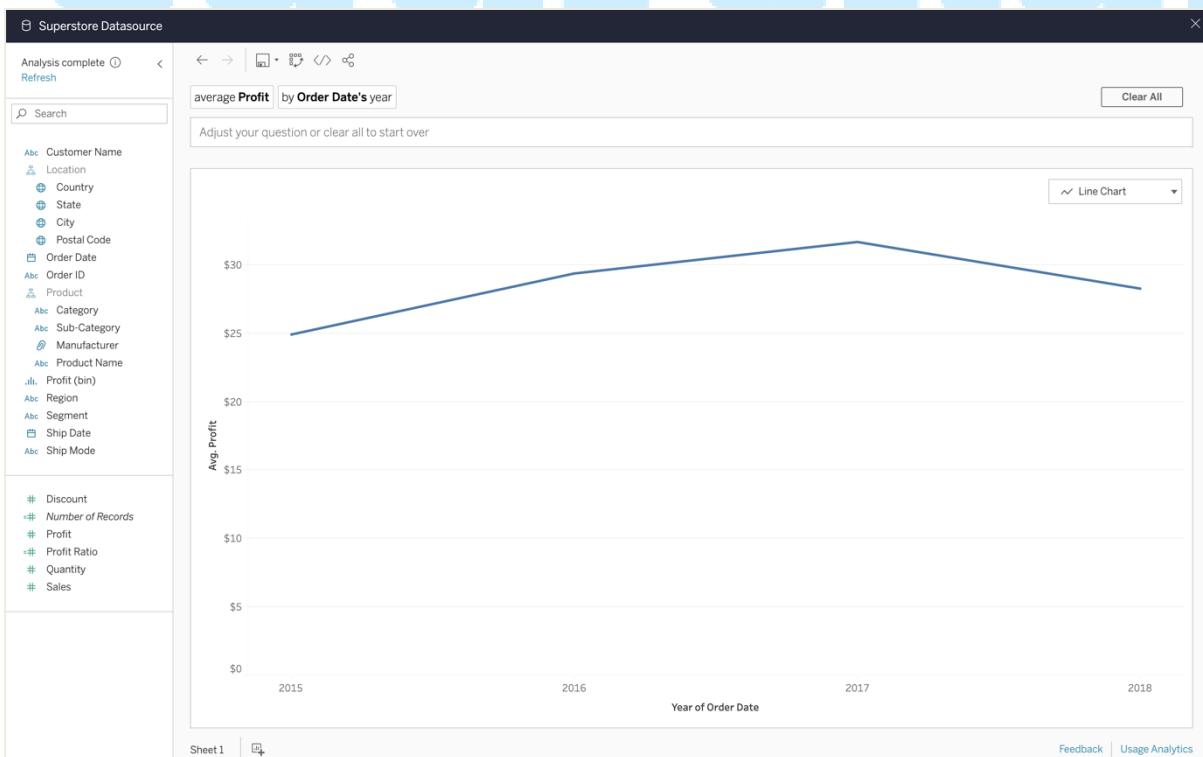


- Change the Aggregation to Average.

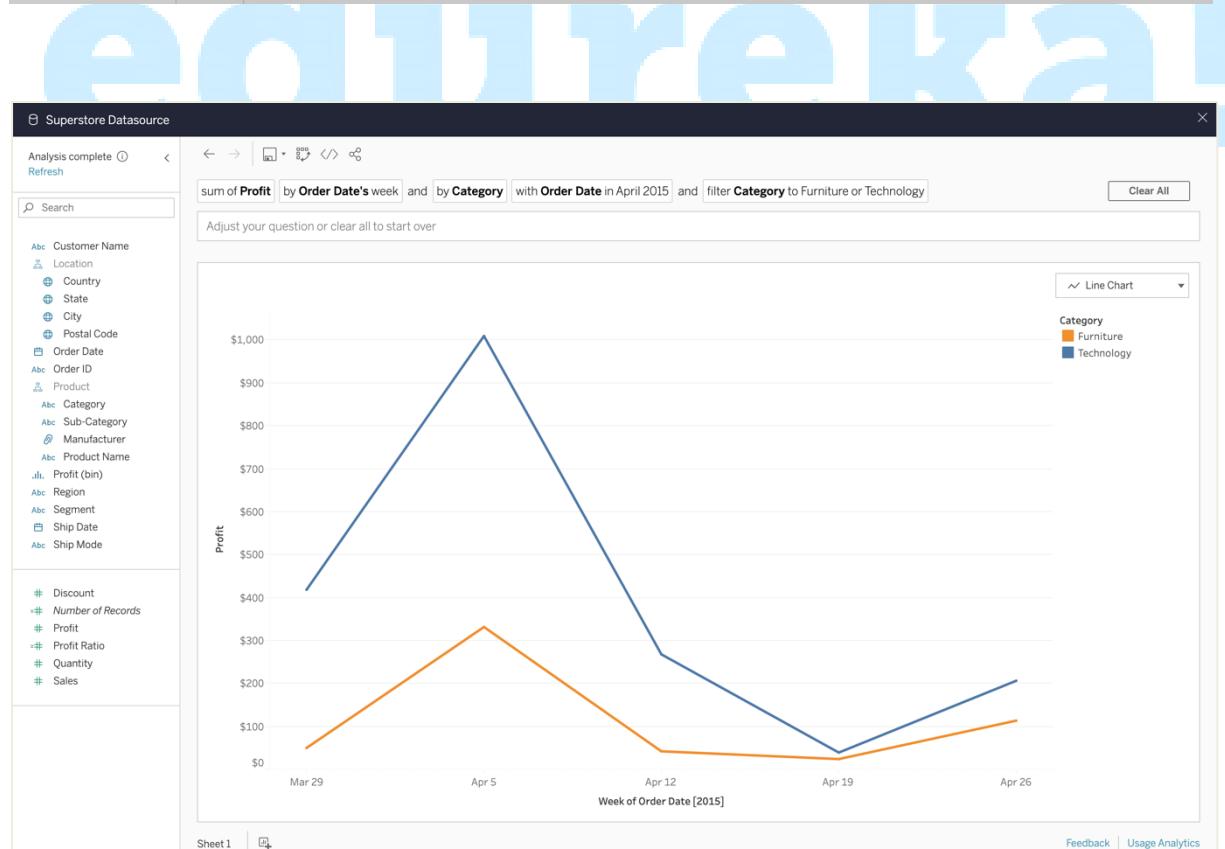
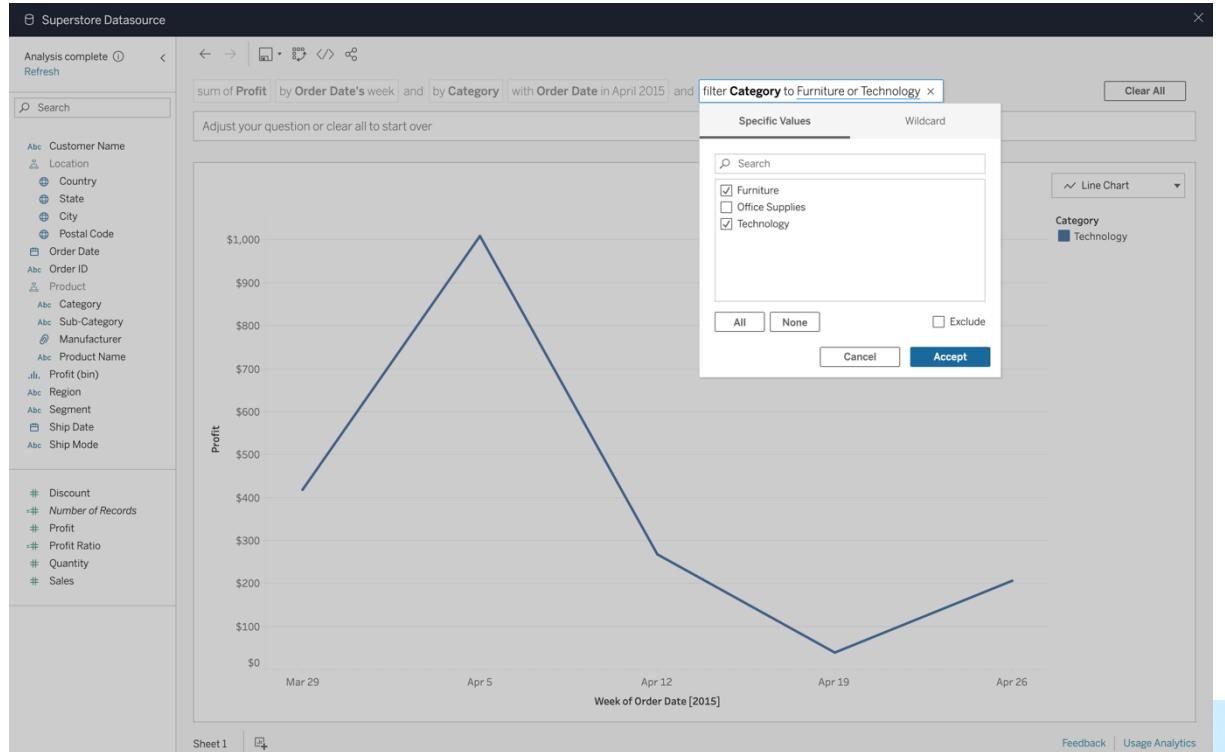




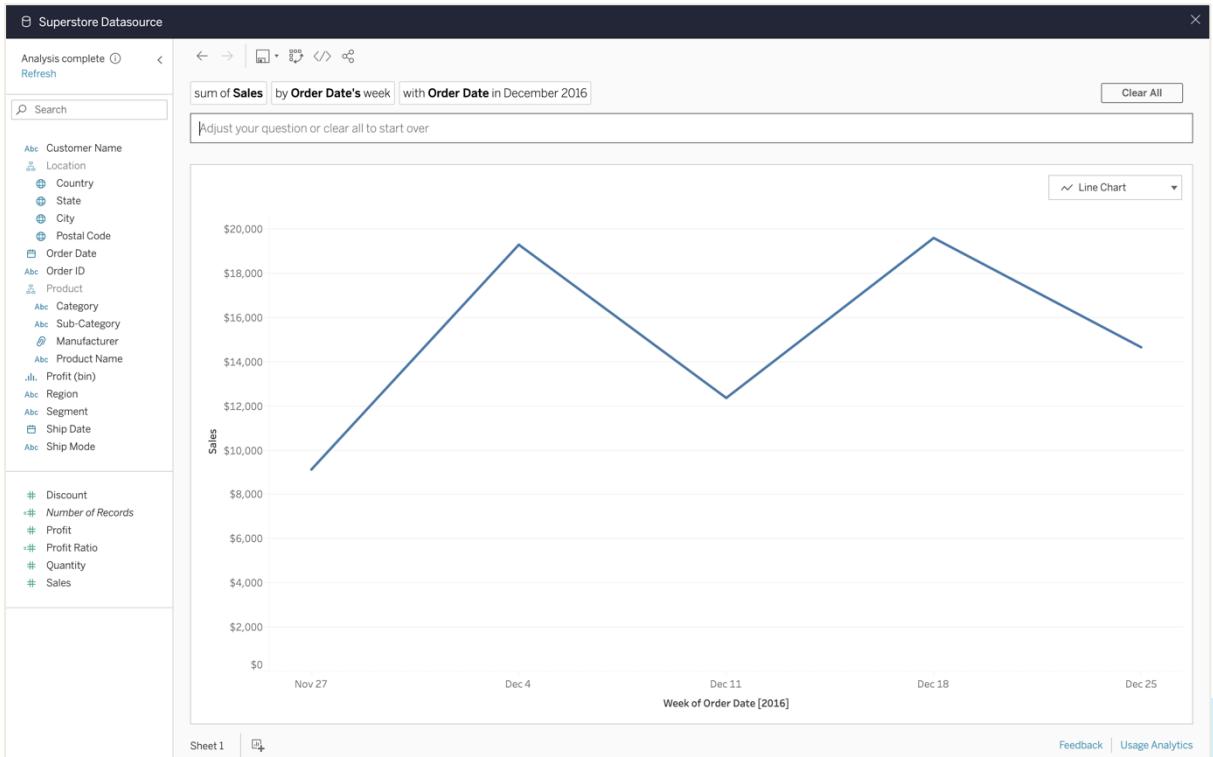
■ Question: What was the Profit for Technology Category in April 2015?



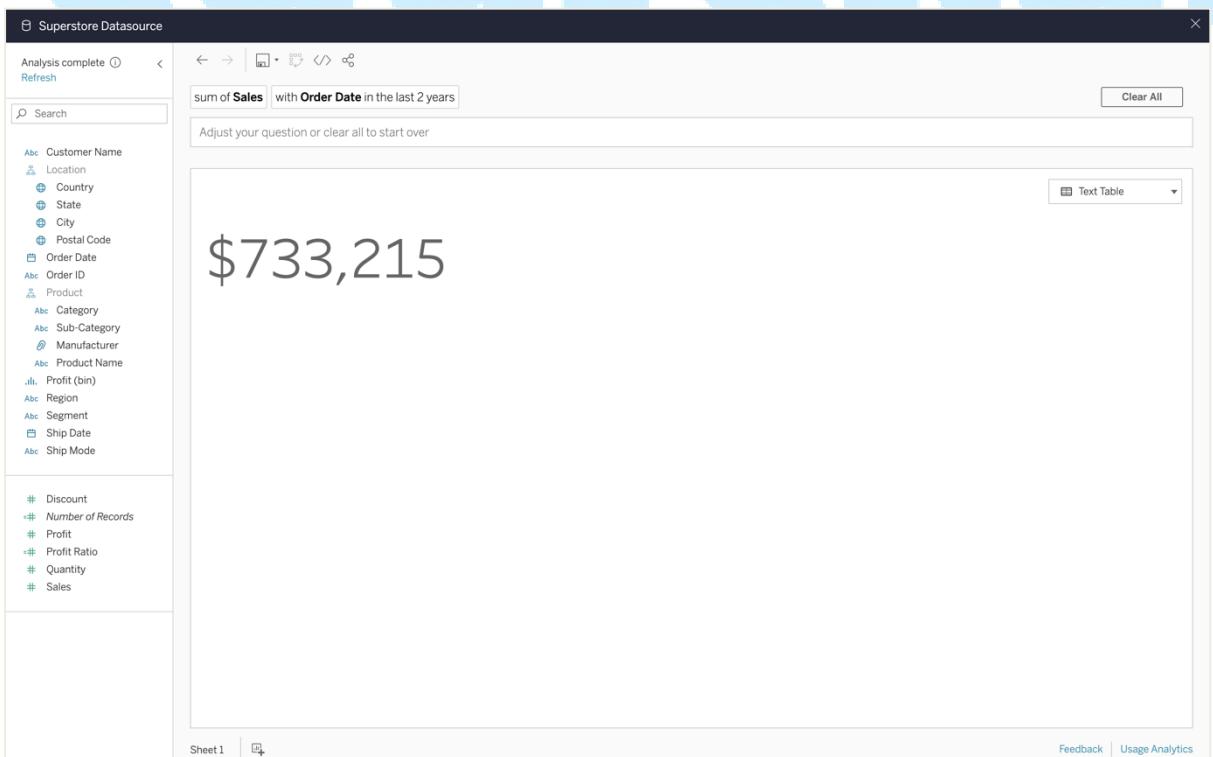
- Edit the values through Filters.



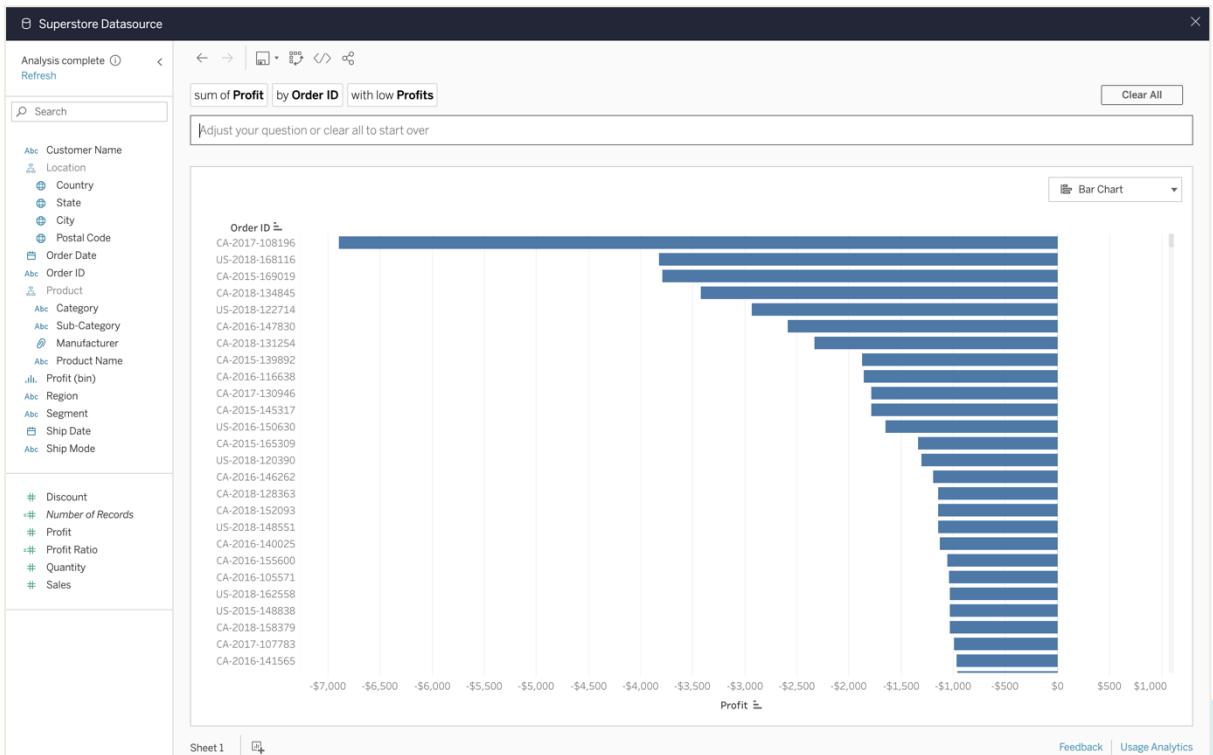
■ Filter By Date: Question - Sales in December 2016



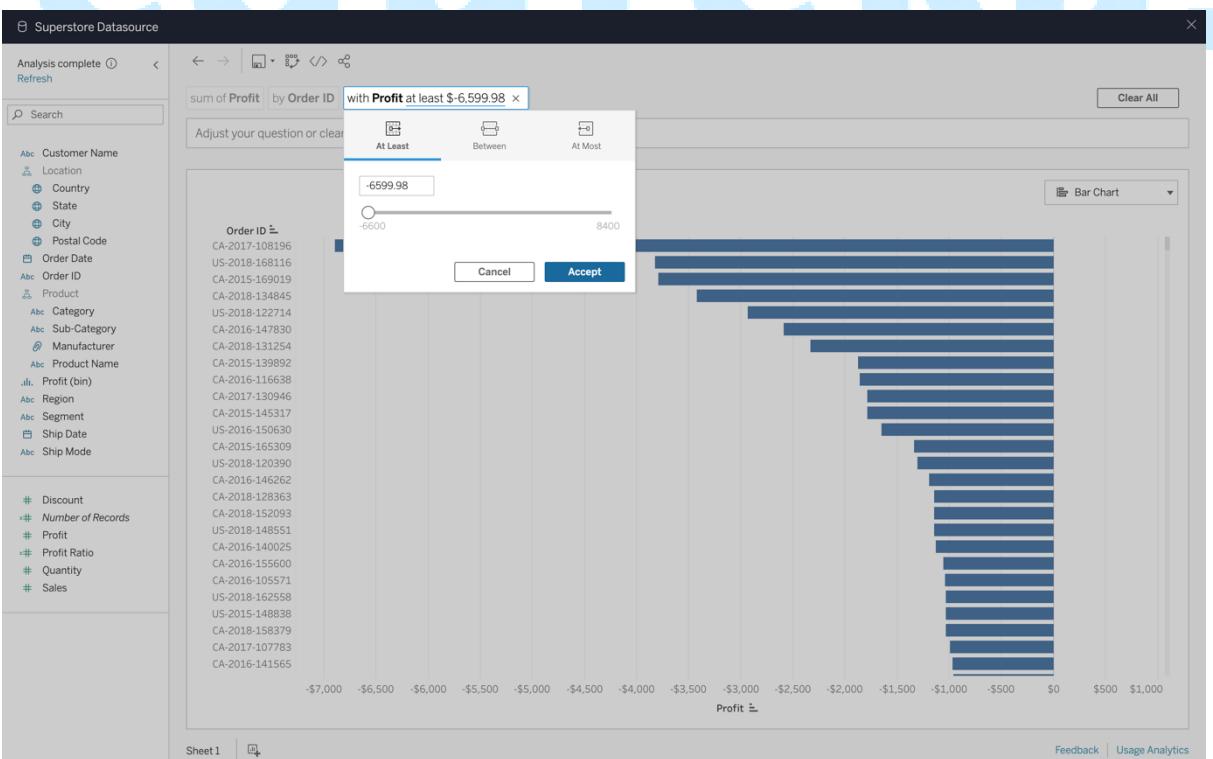
■ Question: Sales in the last 2 years.



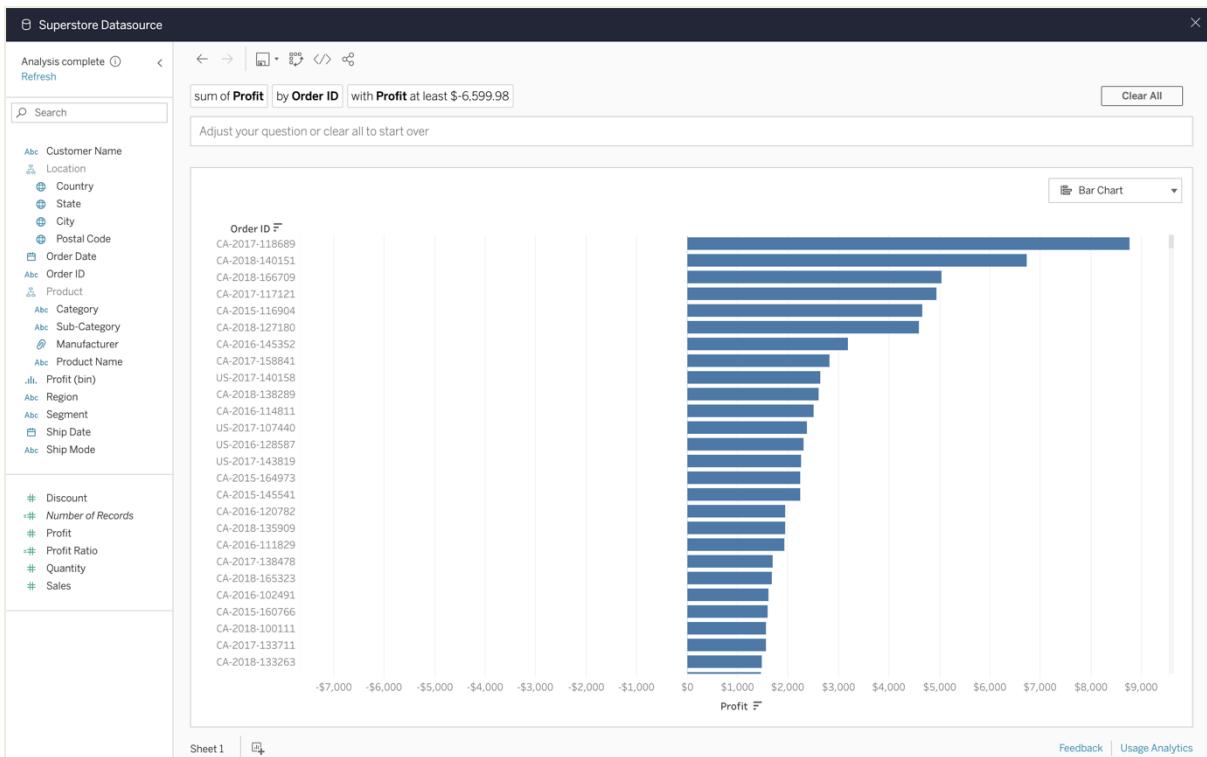
- Question: Which of the orders had low profits?



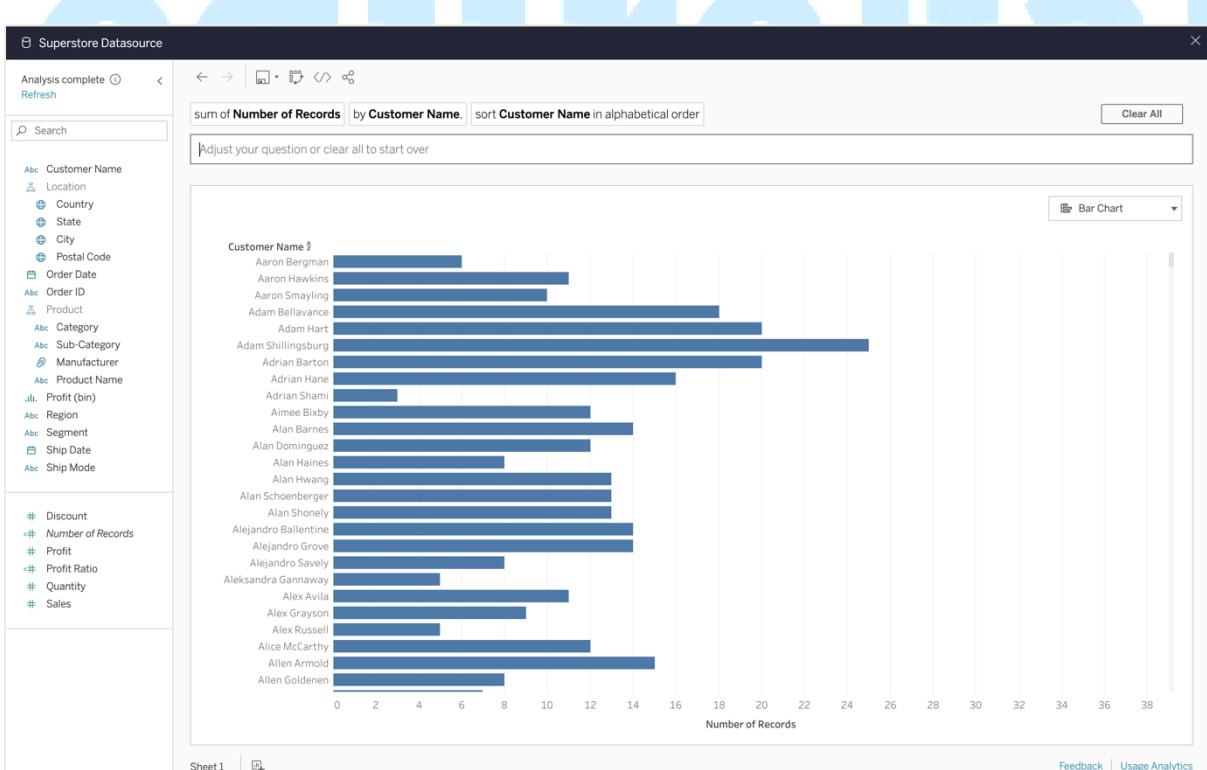
- Specify the range.



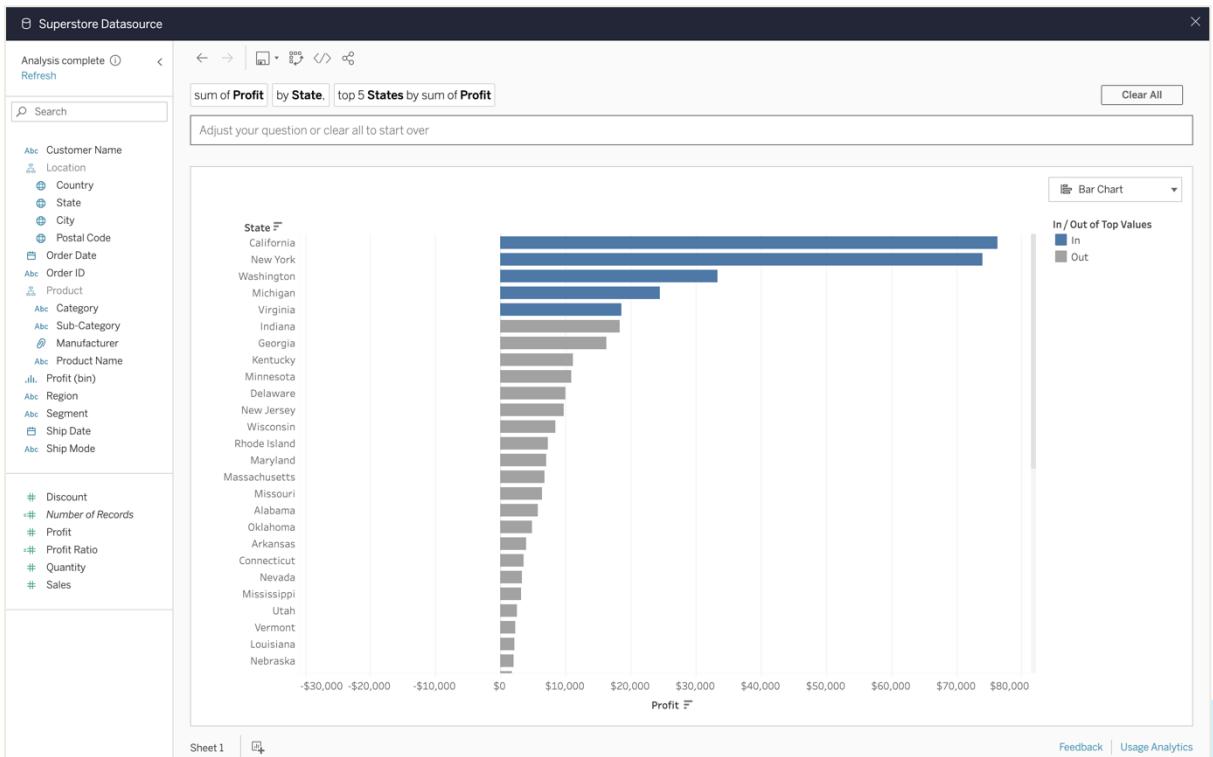
## Module 11 - Exploring Tableau Online



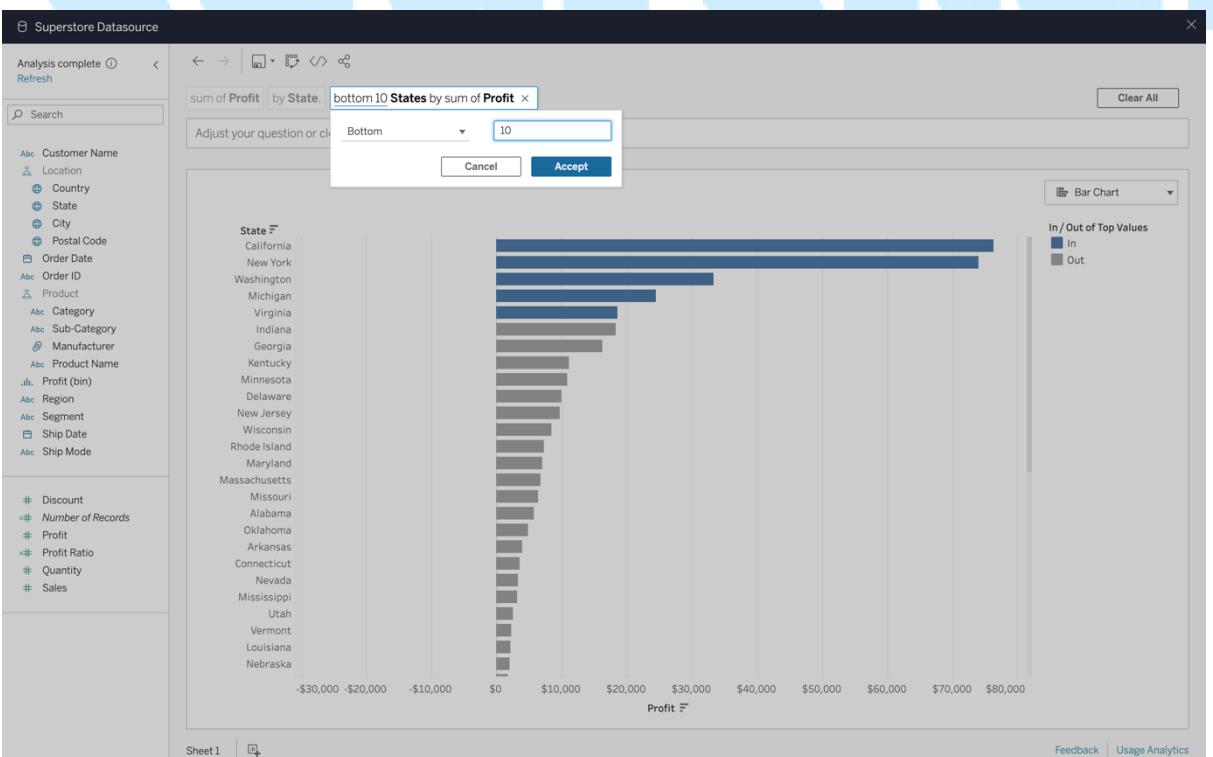
- Question: Sort Customer Name in alphabetical order.

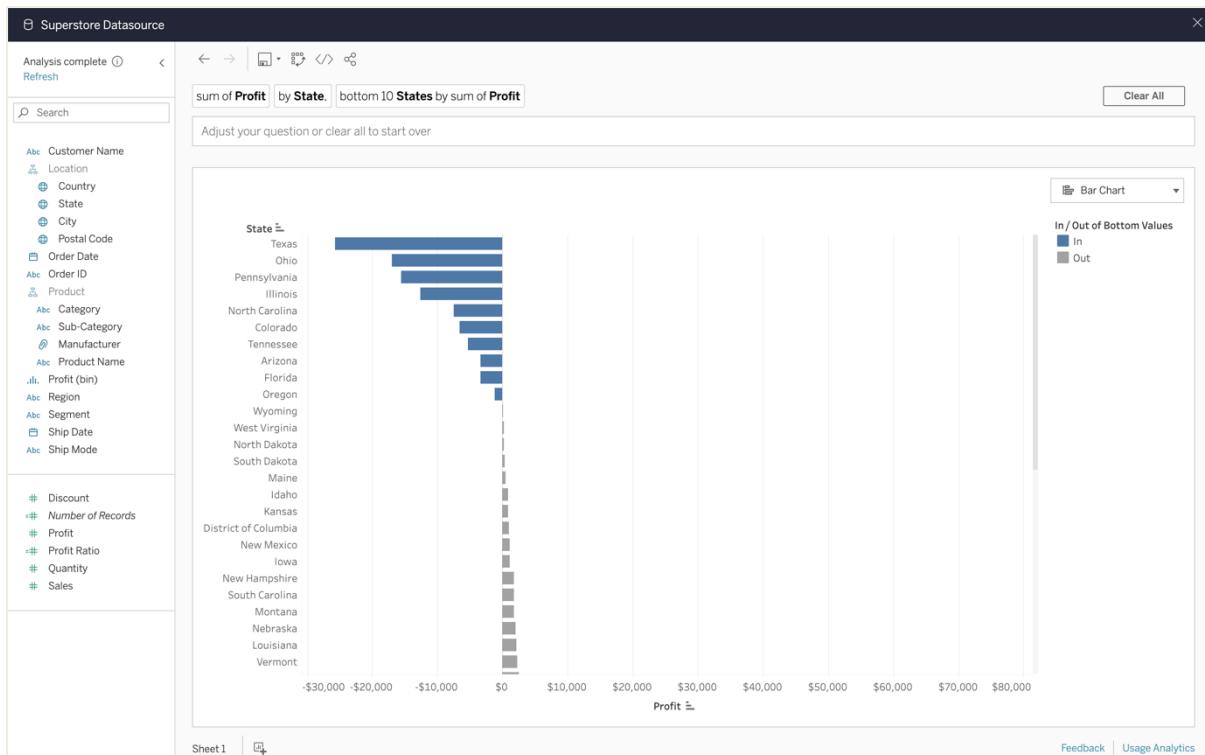


■ Top 5 States by Profit.

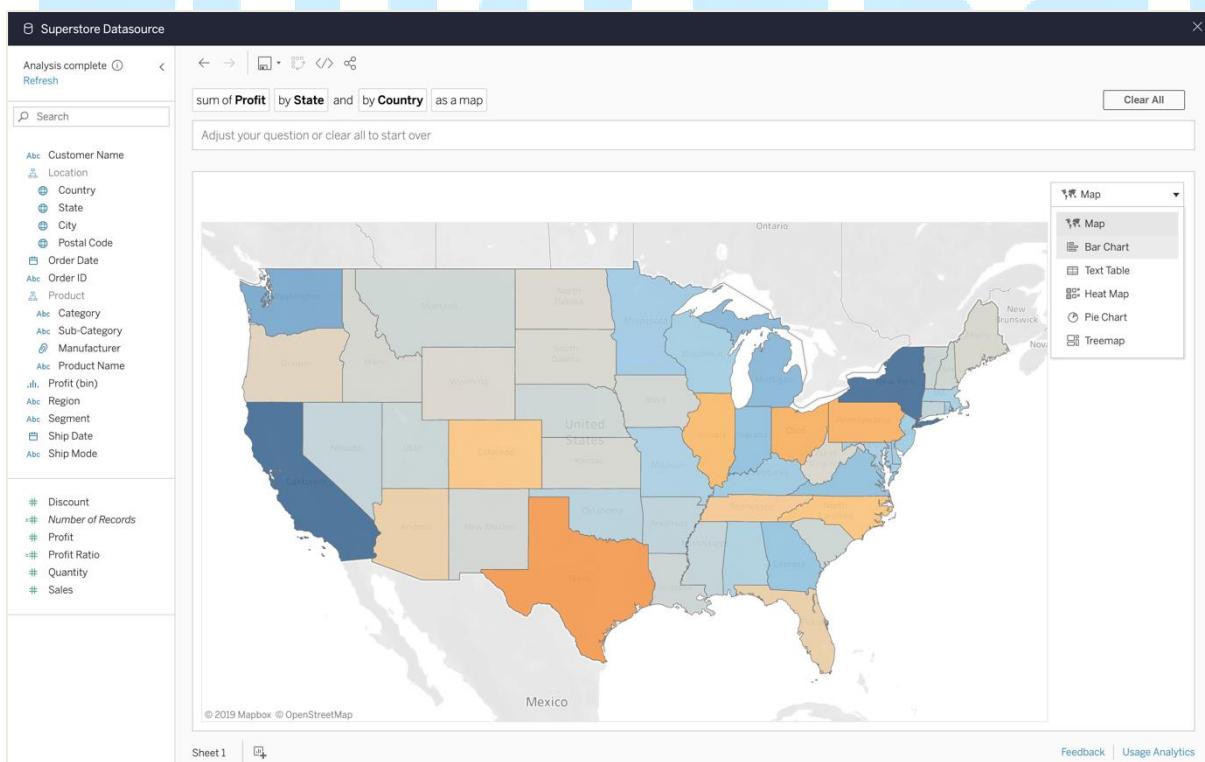


■ Modify the field from “Top” to “bottom” and observe the result.

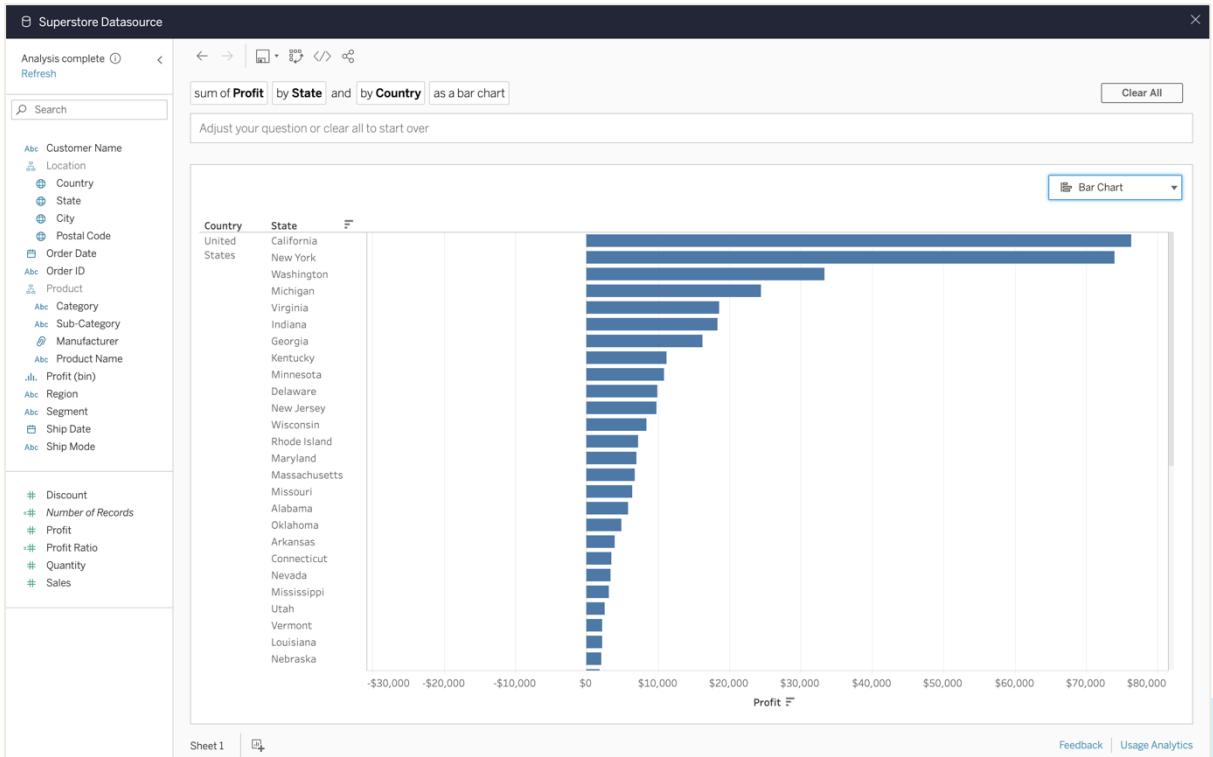




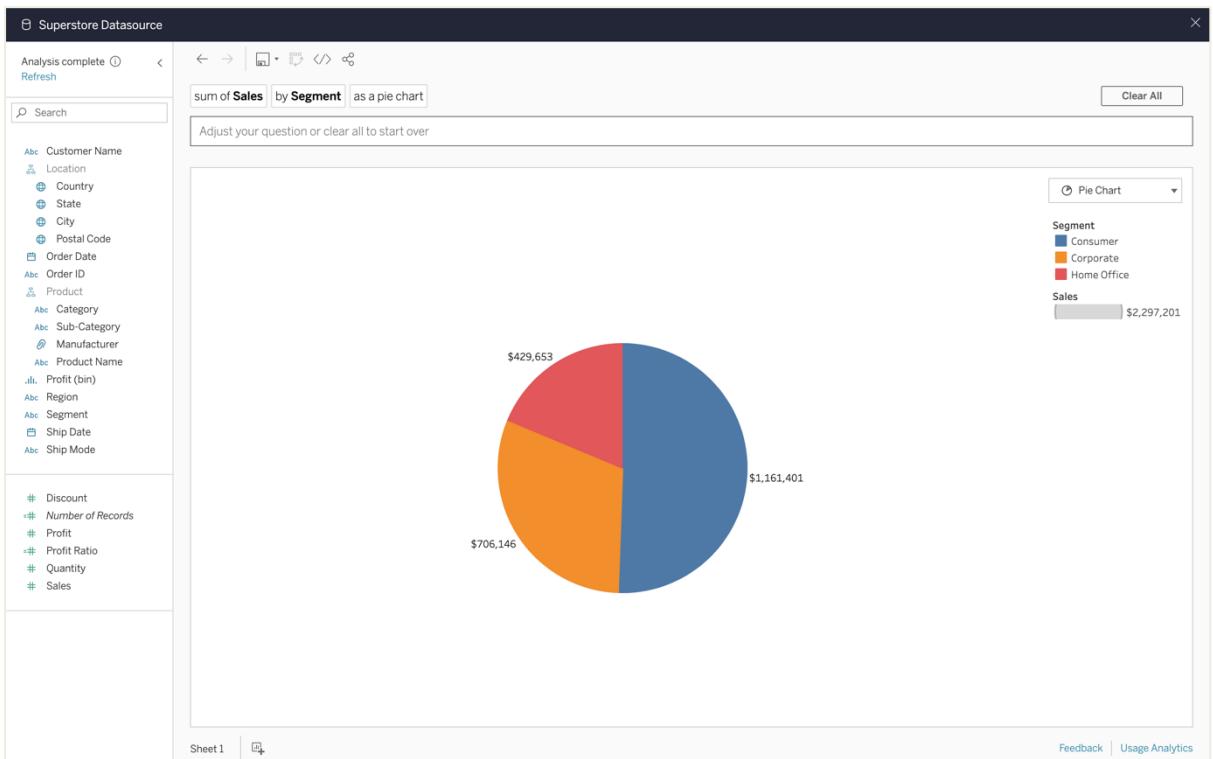
- Select the desired visualization.



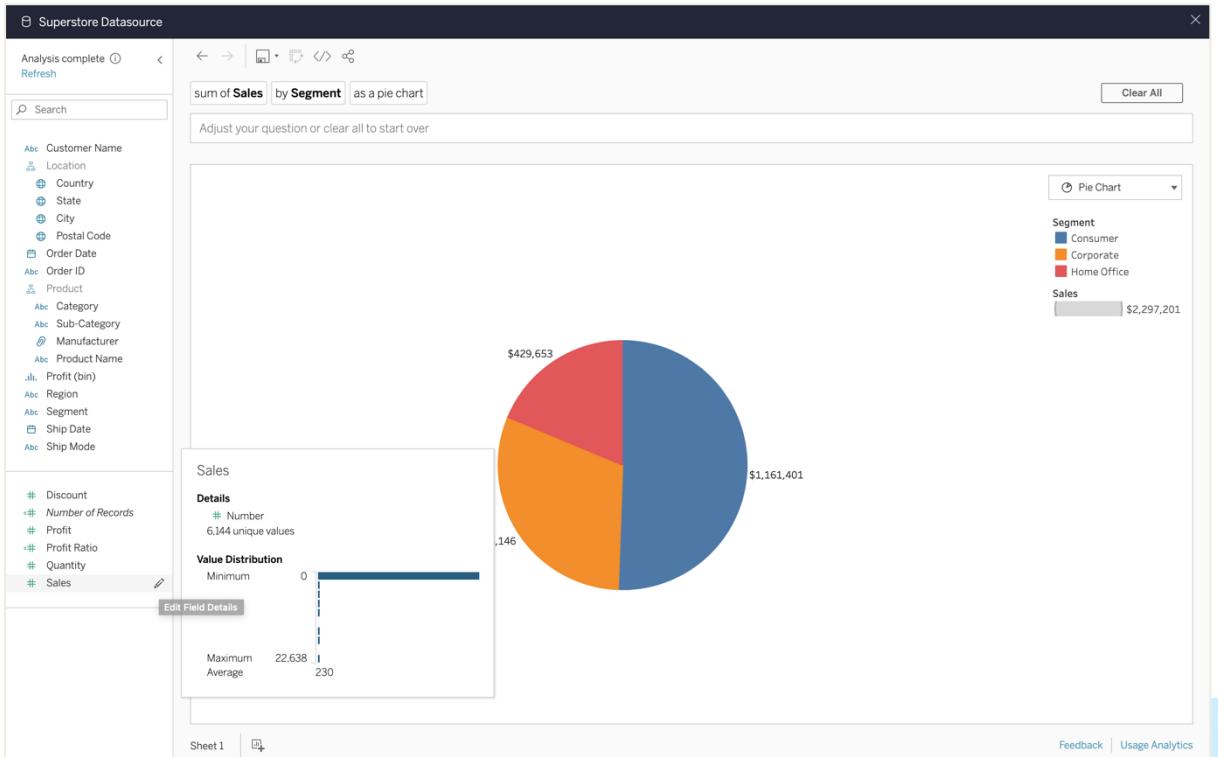
- Change the Visualization to Bar chart.



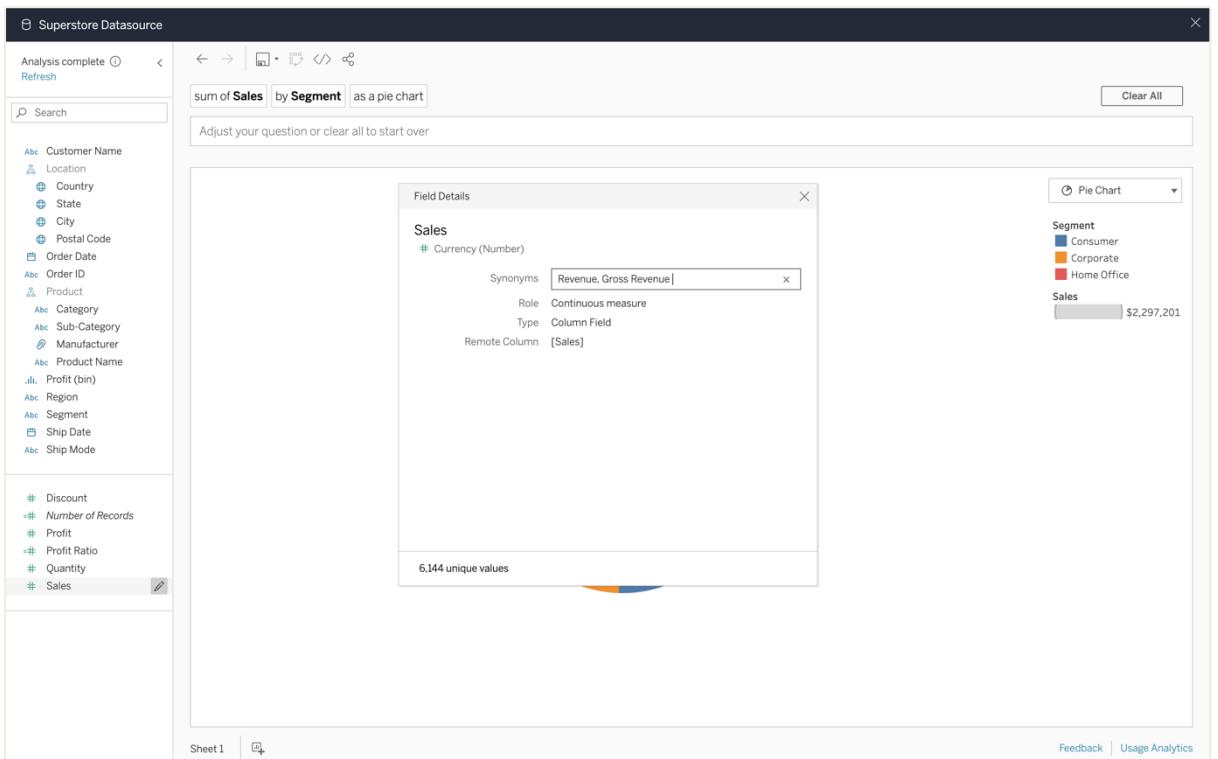
- Visualization can be mentioned in the question as well.
- Example: Sales in each Segment as a Pie chart.



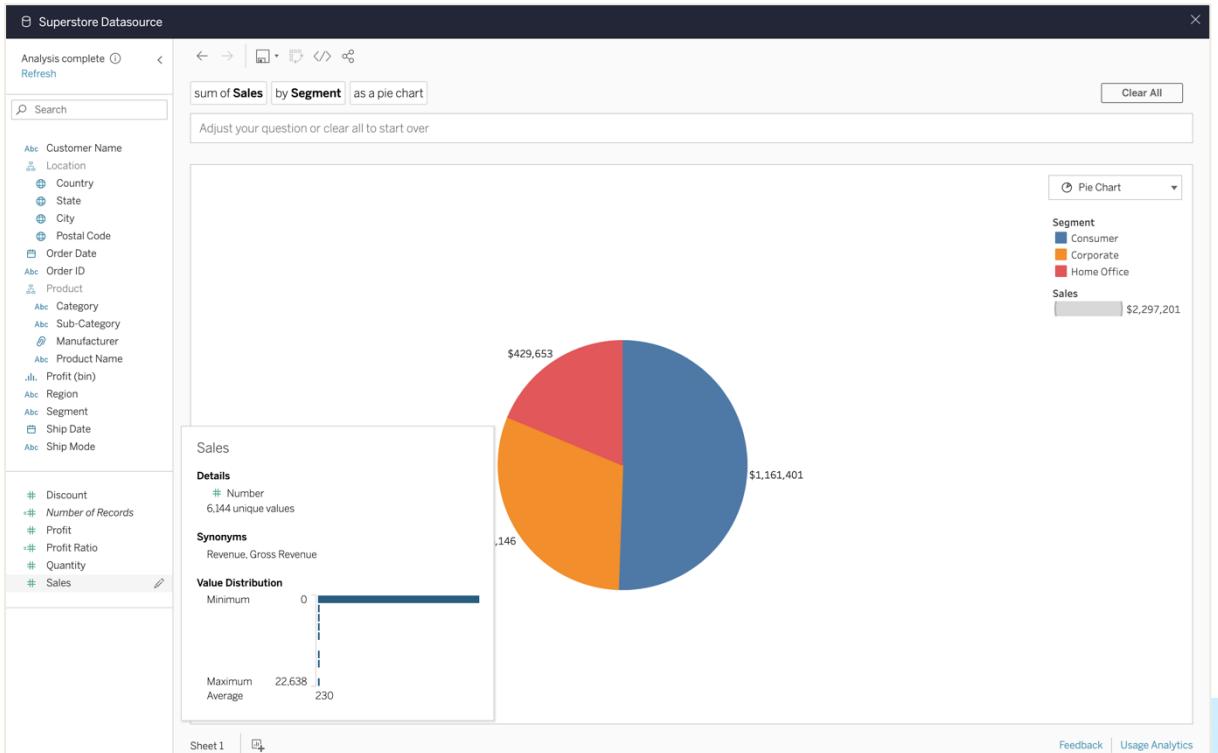
- Click on a Measure or a Dimension for editing.



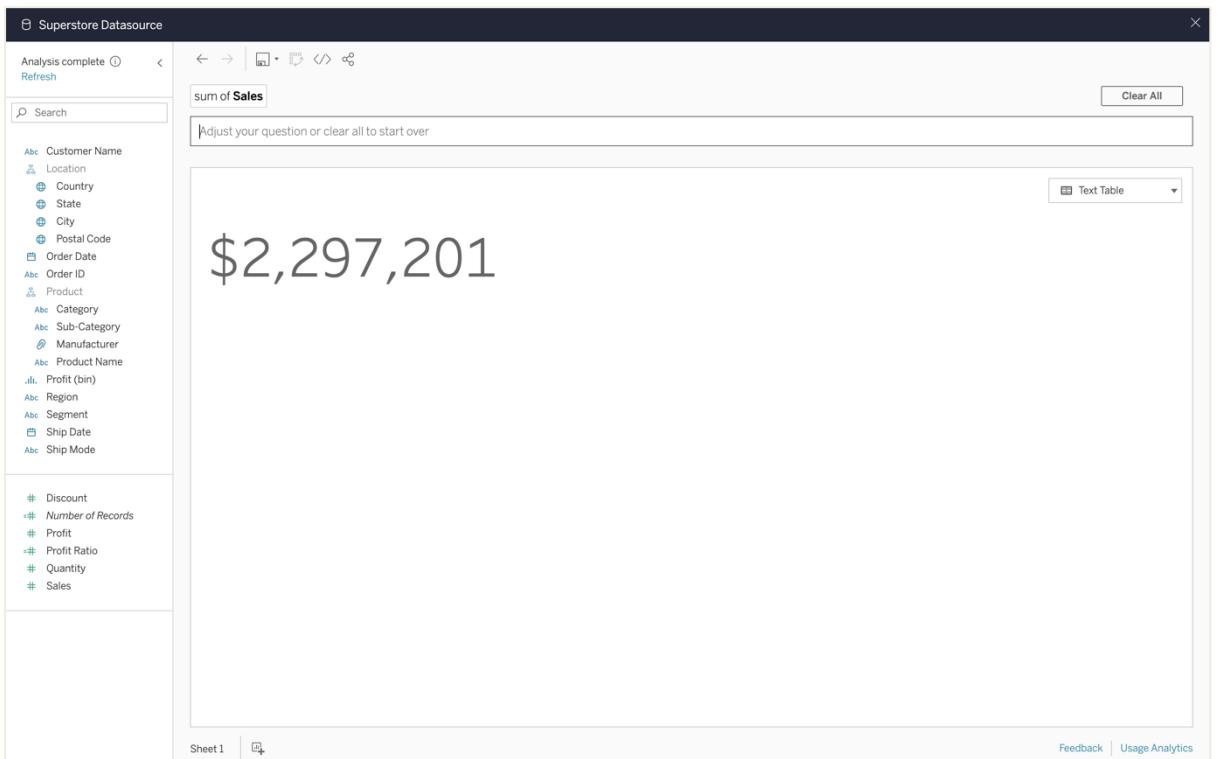
- Assign multiple names to a Measure or a Dimension. Each name should be separated by comma.



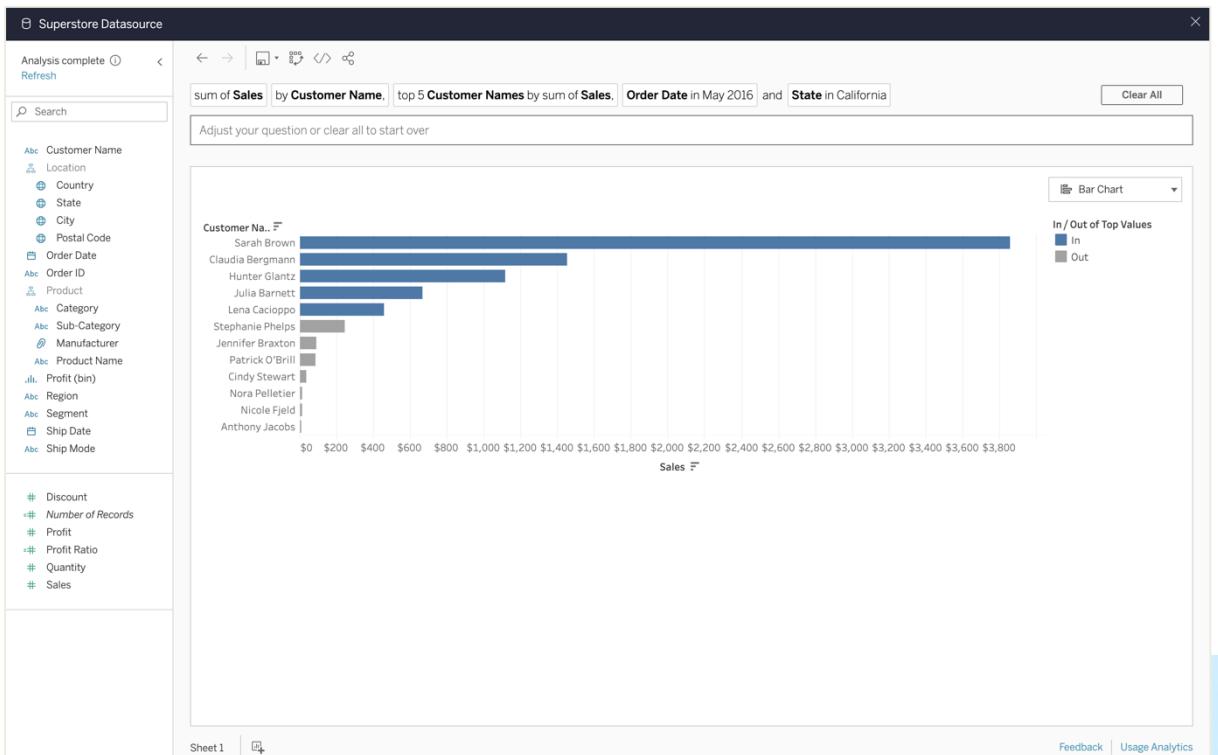
- Hover over the field and observe the newly assigned names.



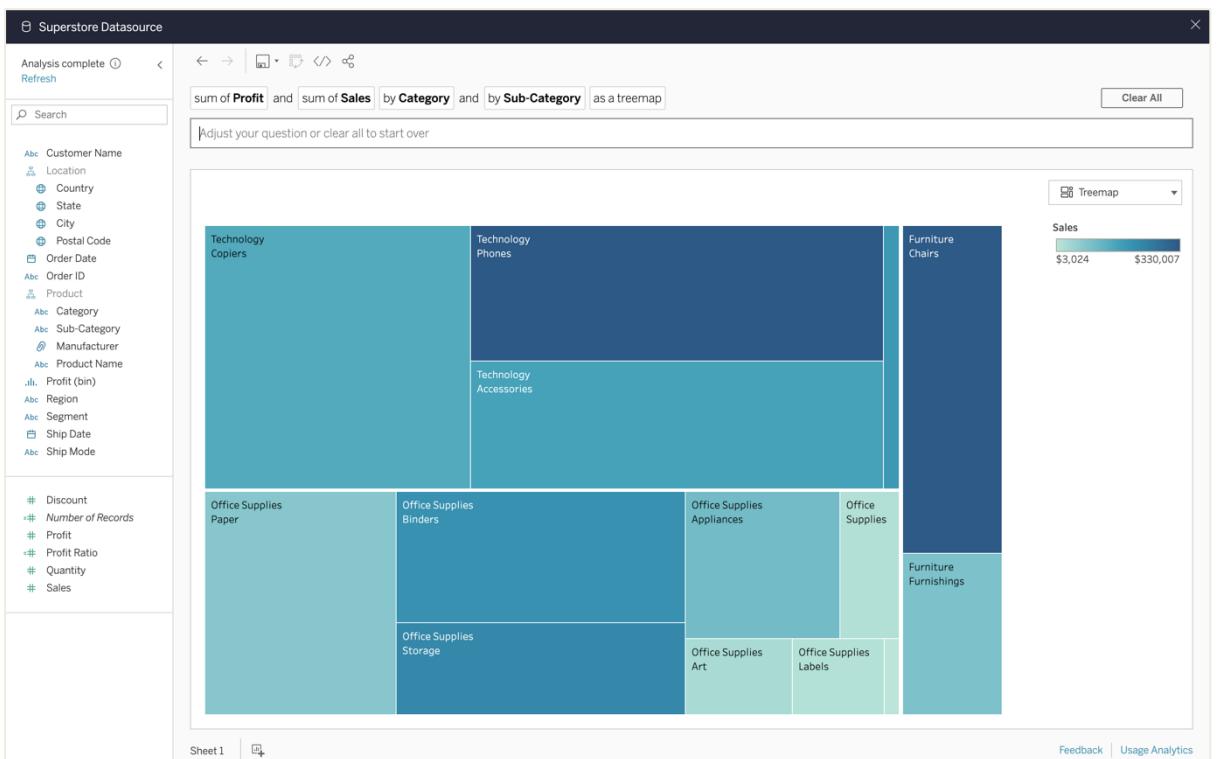
- Question: What was the Revenue?
- Result: Sum of Sales



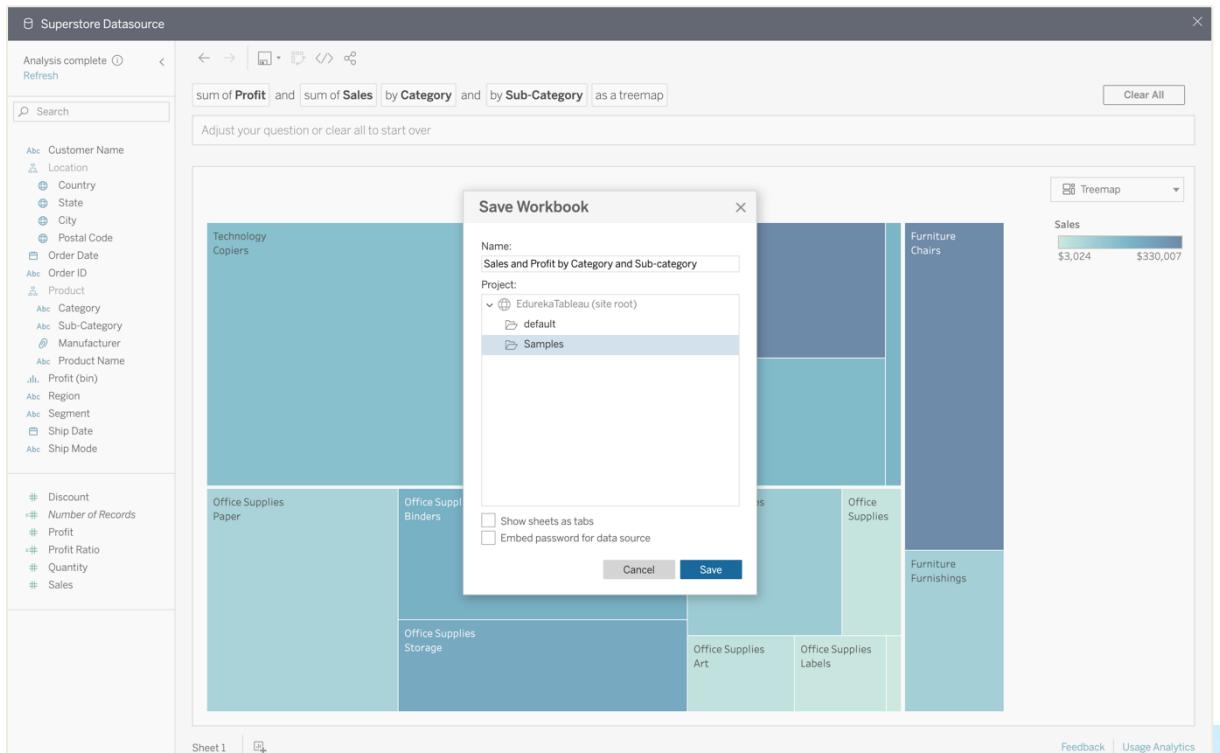
- Question: List the top 5 customers in California, based on the Sales data in the month of May 2016.



- Question: Compare Profit and Revenue for each Category and Subcategory



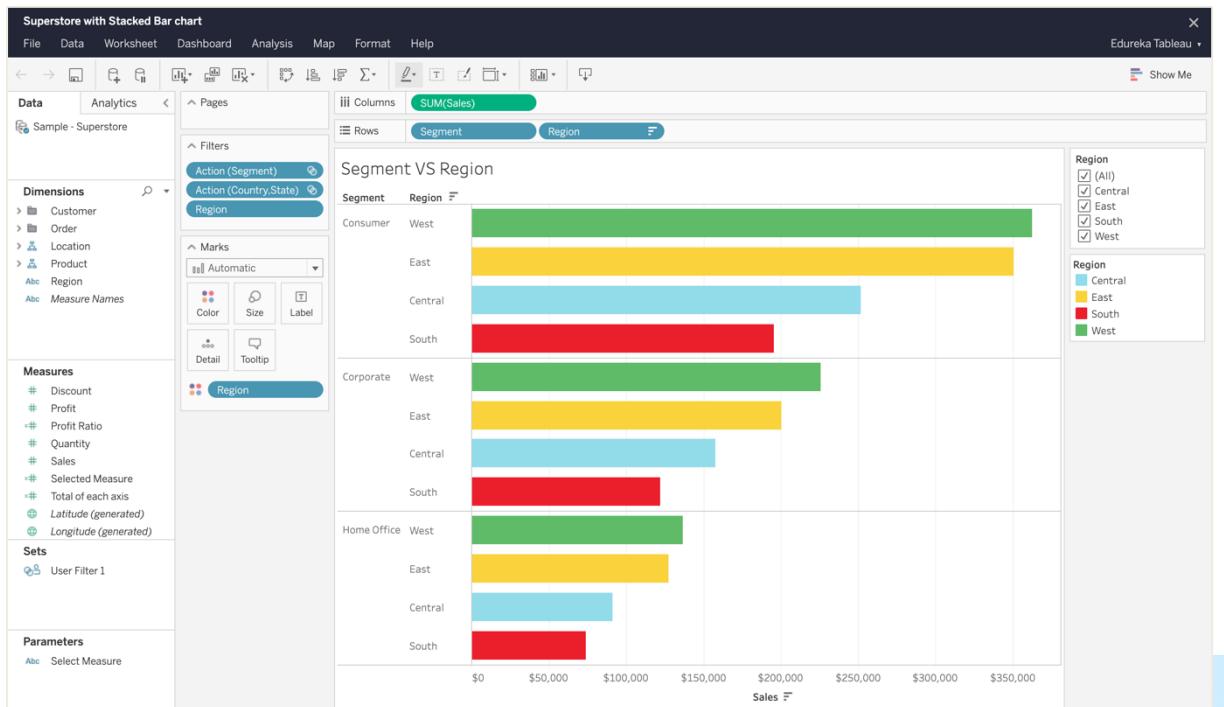
- Click on the “Save” icon for saving the workbook.



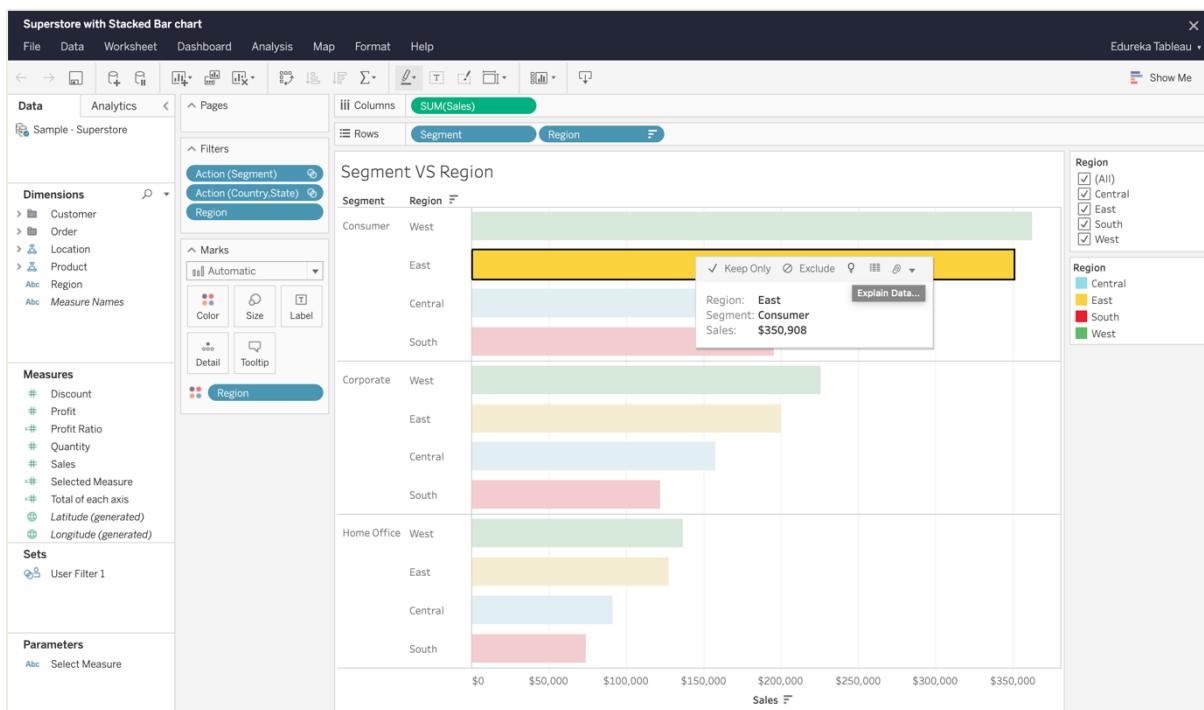
edureka!

## Explain Data

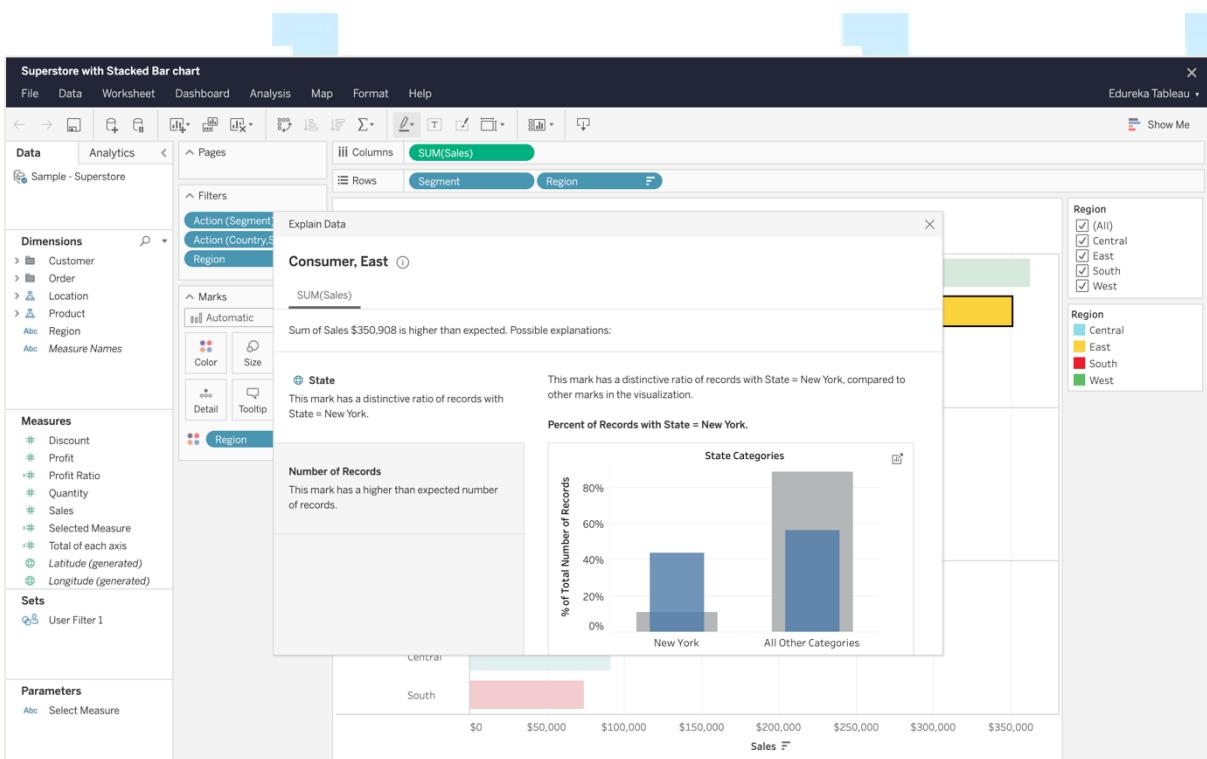
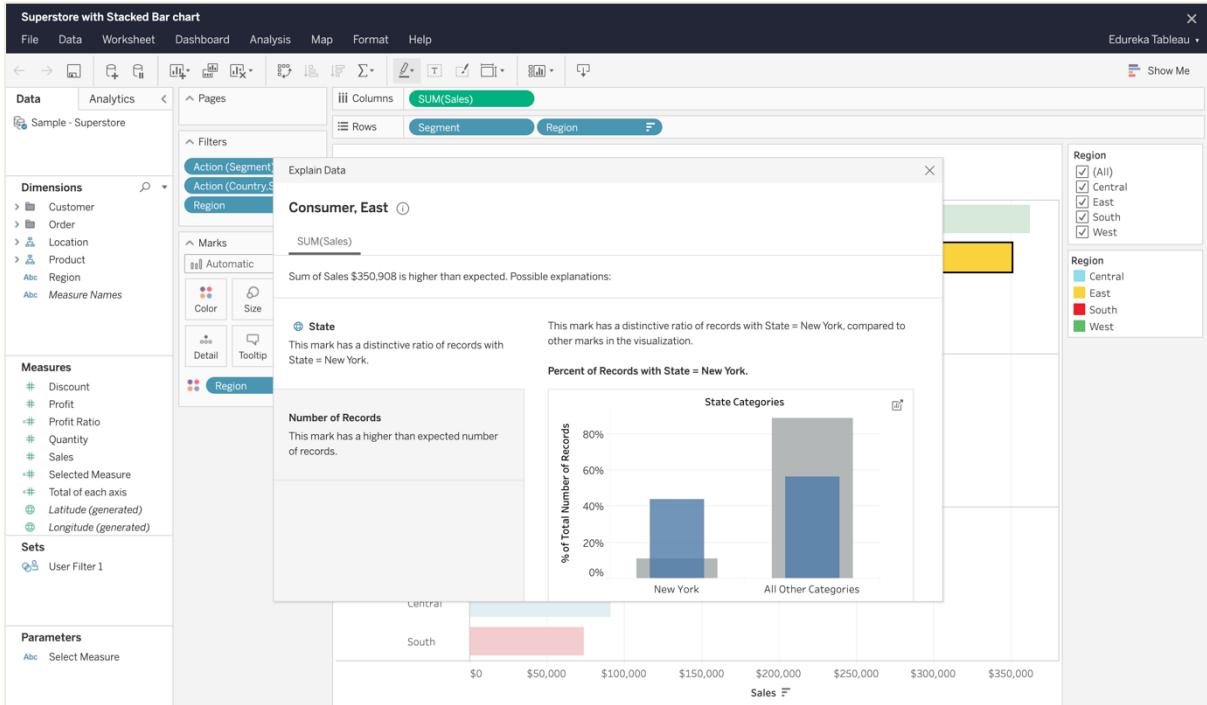
- Open a Workbook in Edit Mode in Tableau Online.



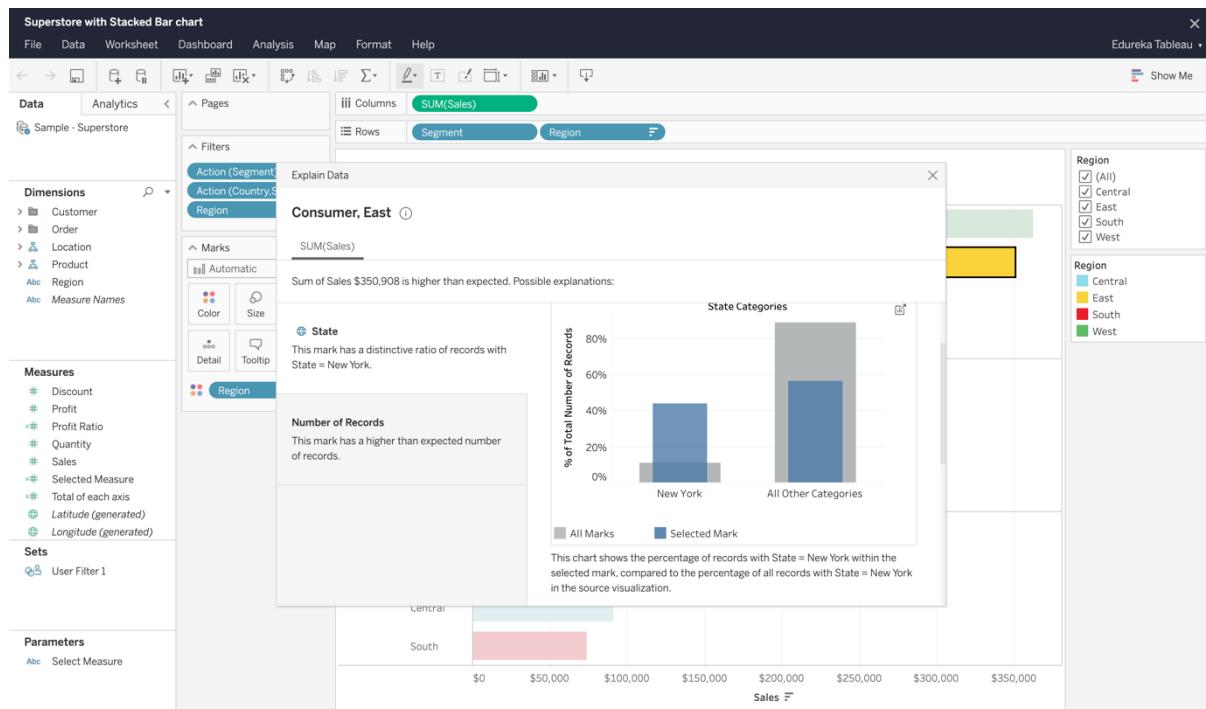
- Click on the mark whose data need to be explained and click on the “Explain Data” icon.



## Module 11 - Exploring Tableau Online



## Module 11 - Exploring Tableau Online



- Scroll down and observe that Average sales in New York (East Region).

