

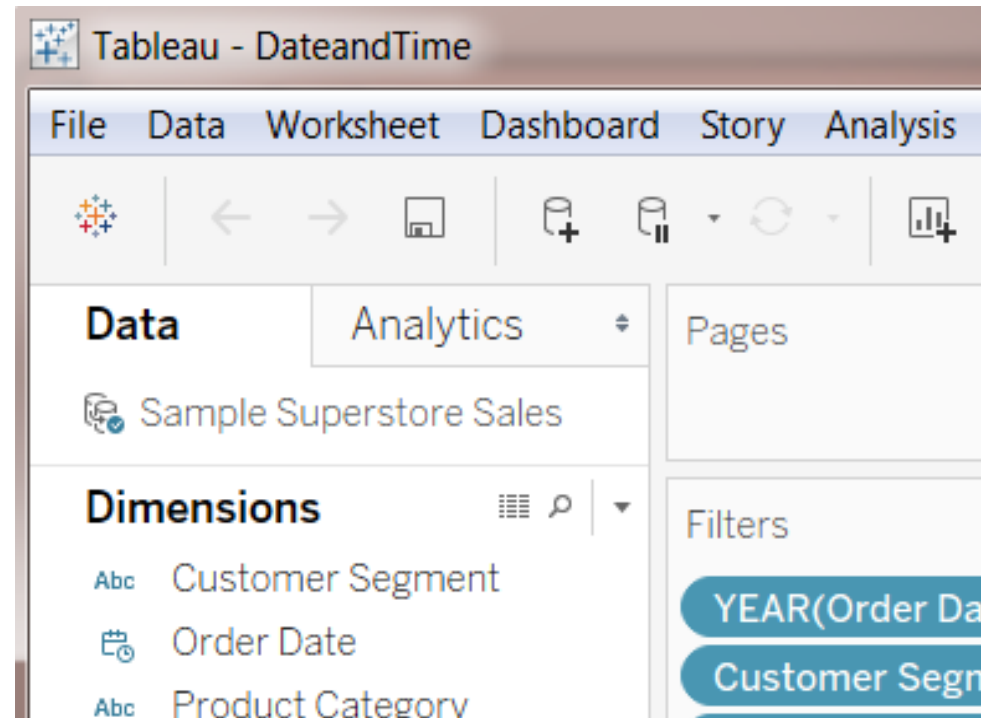
Lesson 2:

Data Connections



Creating Workbooks

- **To create a new workbook**, select **File > New**.
- **To open an existing workbook**, click the thumbnail image of the workbook on the start page.
- When you open a workbook, the workbook name appears in the title bar.





Creating Dashboard

- A dashboard is a collection of several worksheets and supporting information shown in a single place so you can compare and monitor a variety of data simultaneously. For example, you may have a set of views that you review every day. Rather than flipping through each worksheet, you can create a dashboard that displays all the views at once.
- **Create a Dashboard**
- After you've created one or more views, you can pull them into a dashboard, add interactivity, and much more
- **Open a dashboard sheet**
You create a dashboard in much the same way you create a new worksheet. After you create a dashboard you can add views and objects.
- To open a new dashboard sheet and start creating a dashboard, click the **New Dashboard** icon at the bottom of the workbook:
- The **Dashboard** tab appears on the left and lists the sheets in your workbook.

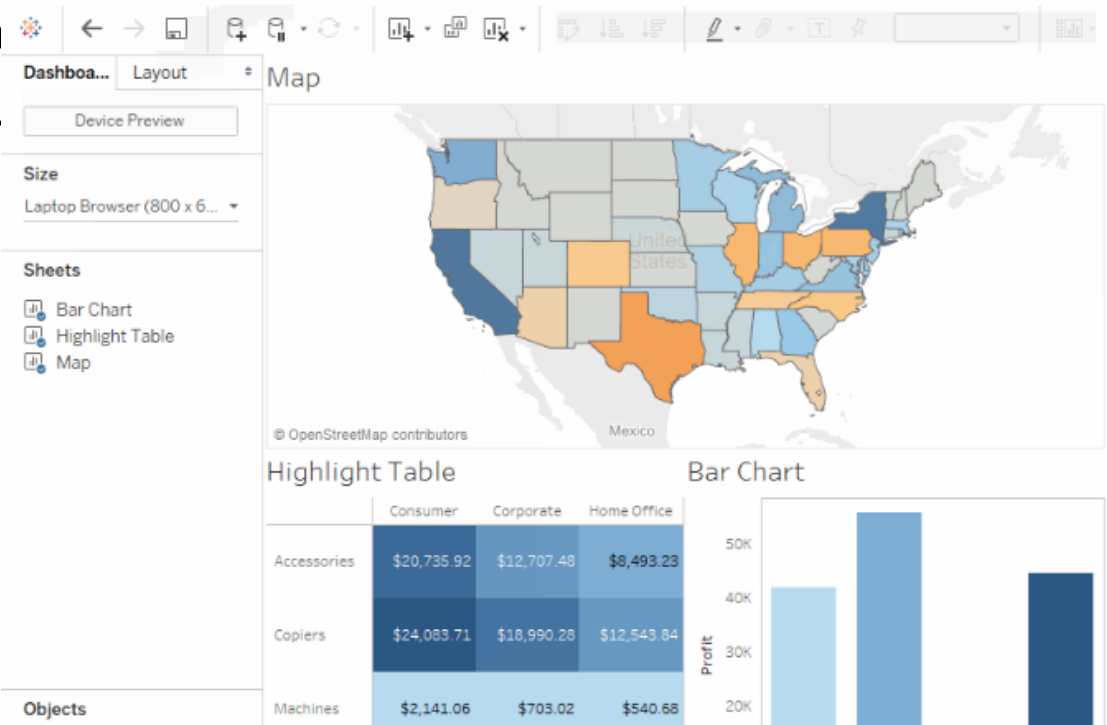
Contd..



➤ Add views

After you have a dashboard sheet, click the views you built (listed under **Sheets** on the left) and drag them to your dashboard area

indicates wh



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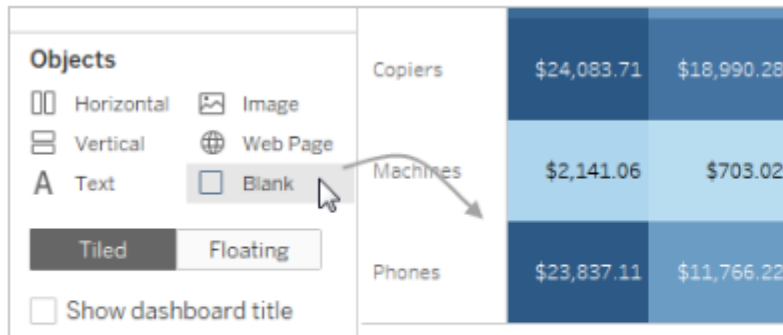


Add

objects

In addition to adding views to your dashboard, you can add objects, including web pages, images, text, blank space, and layout containers.

- Layout containers are helpful for fine-tuning how your dashboard resizes itself when users interact with it. .
- To add an object:
- Select an item under **Objects** on the left and drag it to the dashboard sheet on the right:



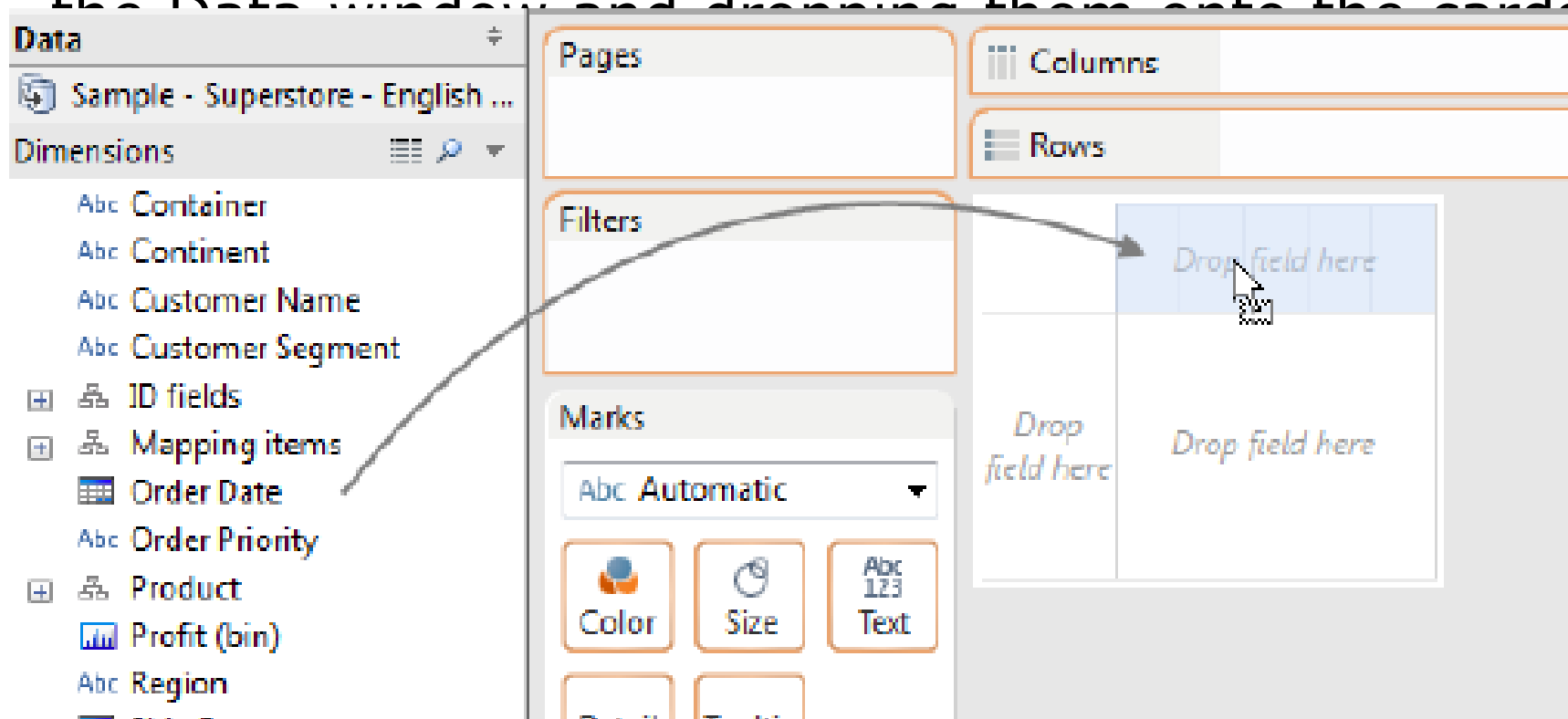
Depending on the object you're adding, you may be prompted for additional information. If you are adding a Web Page object, see [Best Practices for Effective Dashboards](#) for tips on web view security options.

Build Data Views (Manual)



Build Data Views (Manual)


You can build data views by dragging fields from the Data window and dropping them onto the cards



Build Data Views (Automatic)



Rather than building views by dragging and dropping fields, you can use Show Me™ to create

view 

Data

Sample - Superstore - English (Ext...

Dimensions


- Abc Container
- Abc Continent
- Abc Customer Name
- Abc Customer Segment
- ID fields
- Mapping items
- Order Date**
- Abc Order Priority
- Product
- Profit (bin)
- Abc Region
- Ship Date

Measures

- # Discount
- # Order Quantity
- # Product Base Margin
- # Profit**
- # Sales

Normal

Show Me



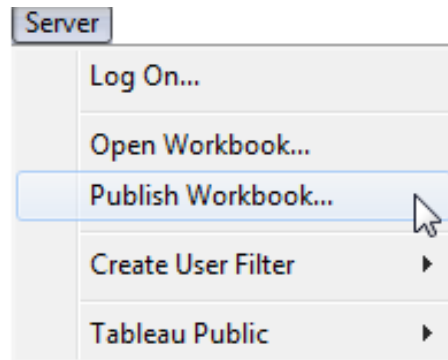
For **lines** (continuous) try

- 1 date
- 0 or more dimensions
- 1 or more measures

Publish Workbooks to the Server

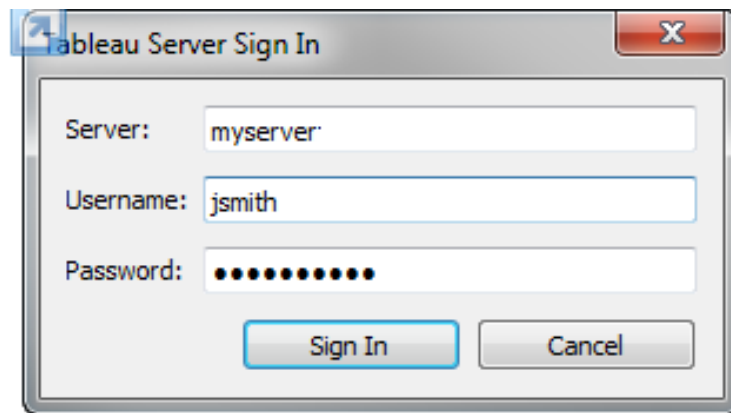


1. Select **Server > Publish Workbook**.

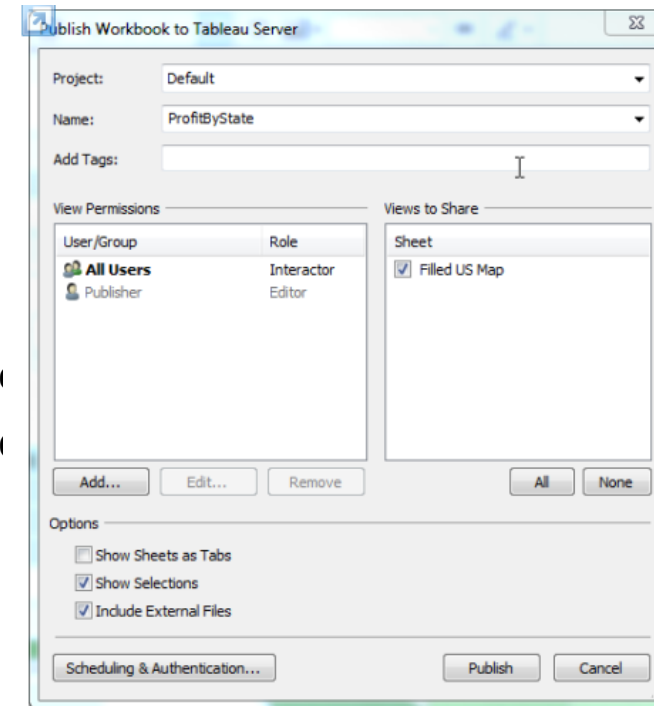


2. If you are not already signed in to Tableau Server, you will see the Tableau Server Sign In dialog box.

3. Next, type your user name and password and click Sign In.



4. You now see the Publish Workbook to Tableau Server dialog box.



5. Select the project, provide name and select the views to be published and select Publish

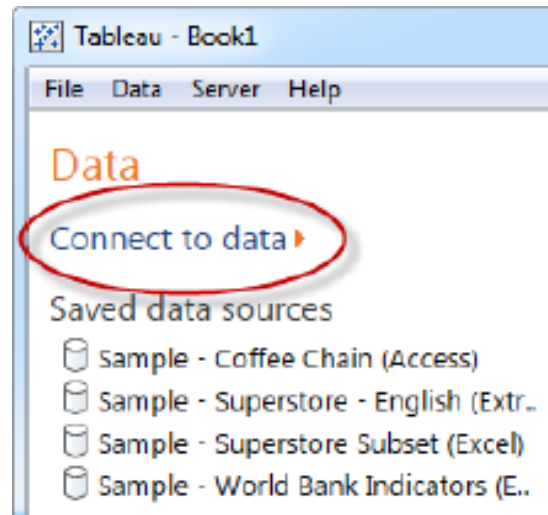
Basic Connection



To begin analyzing your data, first connect Tableau to one or more data sources. A data source can be as simple as an Excel workbook, or as elaborate as a SQL Server or Oracle data warehouse. After connecting, the data fields become available in the Data window on the left side of the workbook.

How to Connect to a Data Source

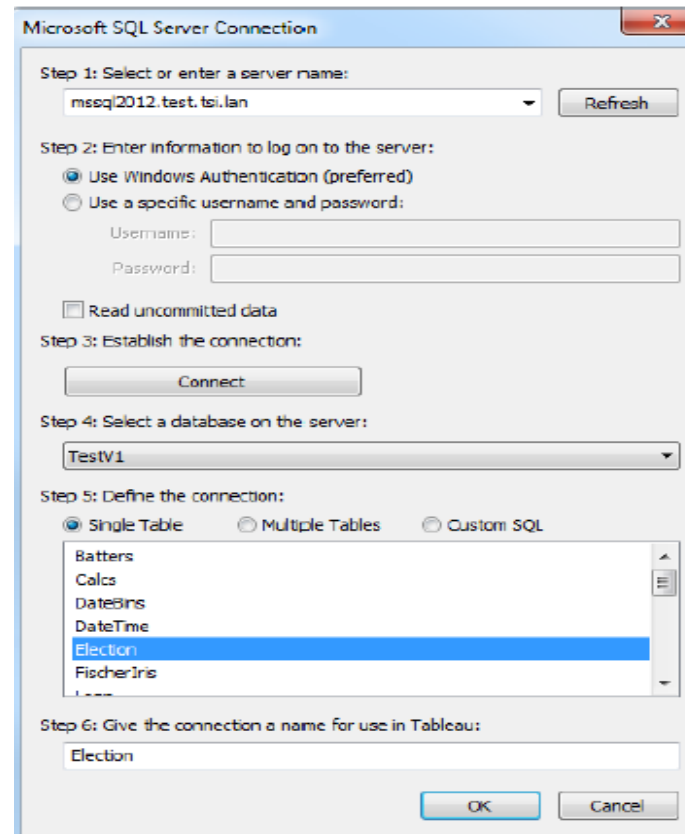
Select **Data > Connect to Data** or press **Ctrl + D** on your keyboard.



Basic Connection



After clicking the connect to data option there would be a new page opening which will ask for the data source credentials.



The screenshot shows the 'Microsoft SQL Server Connection' dialog box with the following steps and settings:

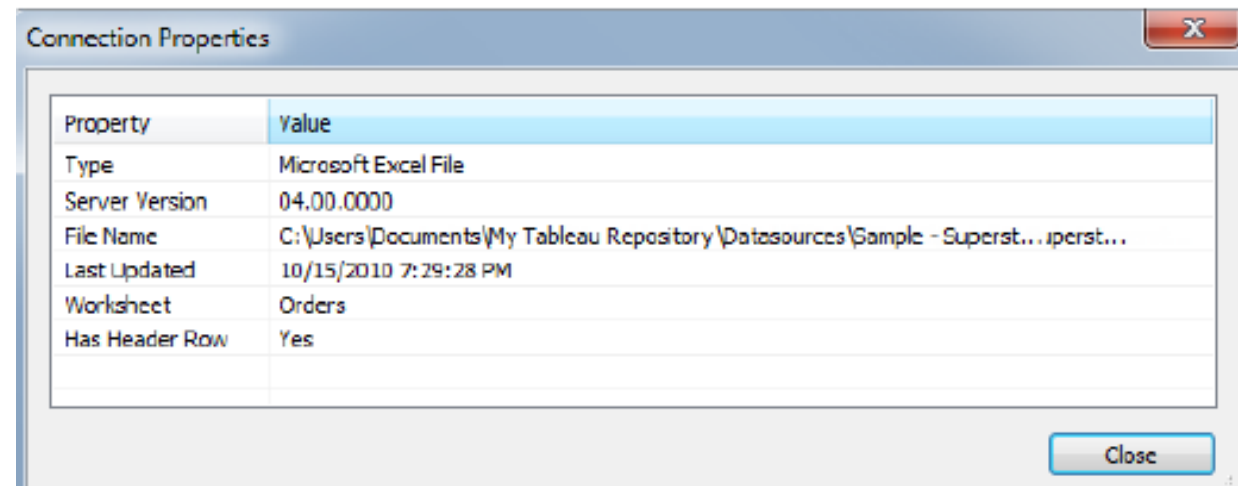
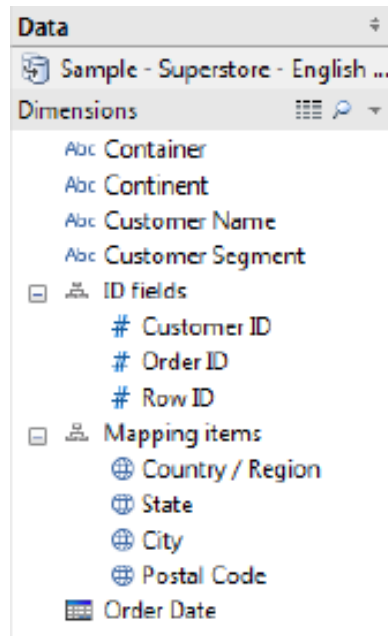
- Step 1: Select or enter a server name:** A dropdown menu shows 'mssql2012.test.tsl.lan'. A 'Refresh' button is to the right.
- Step 2: Enter information to log on to the server:** Two radio buttons are present: 'Use Windows Authentication (preferred)' (which is selected) and 'Use a specific username and password:'. Below the second option are 'Username:' and 'Password:' text boxes.
- Step 3: Establish the connection:** A 'Connect' button is shown.
- Step 4: Select a database on the server:** A dropdown menu shows 'TestV1'.
- Step 5: Define the connection:** Three radio buttons are present: 'Single Table' (selected), 'Multiple Tables', and 'Custom SQL'. Below them is a list box containing the following items: 'Batters', 'Calcs', 'DatesIns', 'DateTime', 'Election' (highlighted in blue), 'FischerIns', and 'Less'.
- Step 6: Give the connection a name for use in Tableau:** A text box contains the name 'Election'.

At the bottom right, there are 'OK' and 'Cancel' buttons.

Basic Connection



After the successful data source connection, the attributes will be automatically divided into Dimensions and Measures.

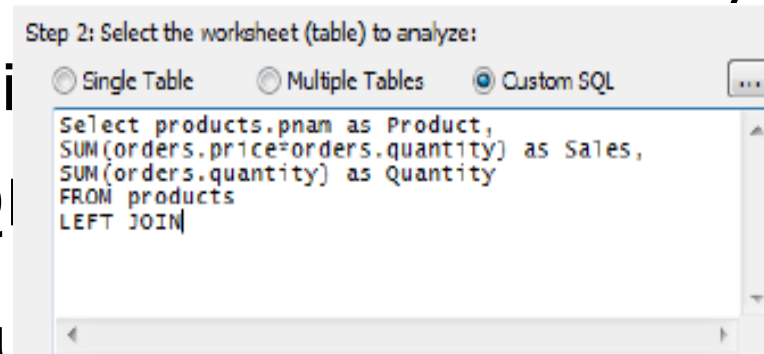


Connecting to a Custom SQL Query



For most relational data sources you can connect to a specific query rather than the entire data source. Often this can be useful when you know exactly the information you want to analyze. To understand how to write SQL, see the [SQL tutorial](#).

Select Custom SQL in the connection dialog box.



- After the query has been created and pasted in the “Custom SQL” option, check if the query is working properly and the results are coming.
- Continue with the same steps (as described earlier) for completing the process of connecting the data source with Tableau.

Quiz



- 1: What are the different Tableau Products and their usage?
- 2: What are Measures and Dimensions?
- 3: What are shelves?
- 4: What is a hierarchical field?
- 5: What is Tableau Data Engine?



Q & A