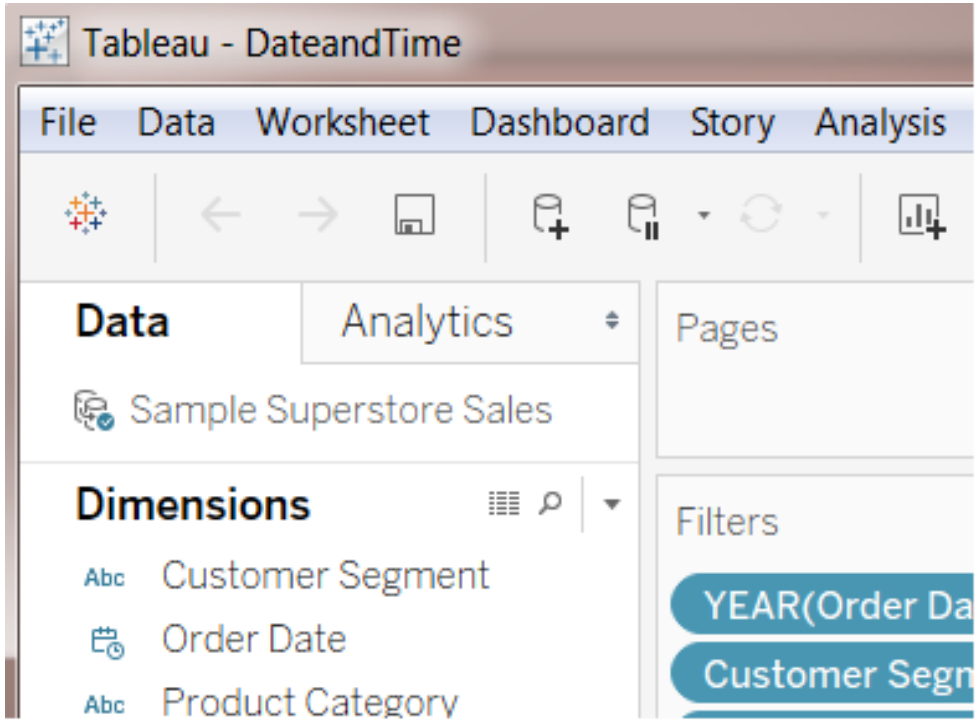
Lesson 2:

Data Connections

Capgemini

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.



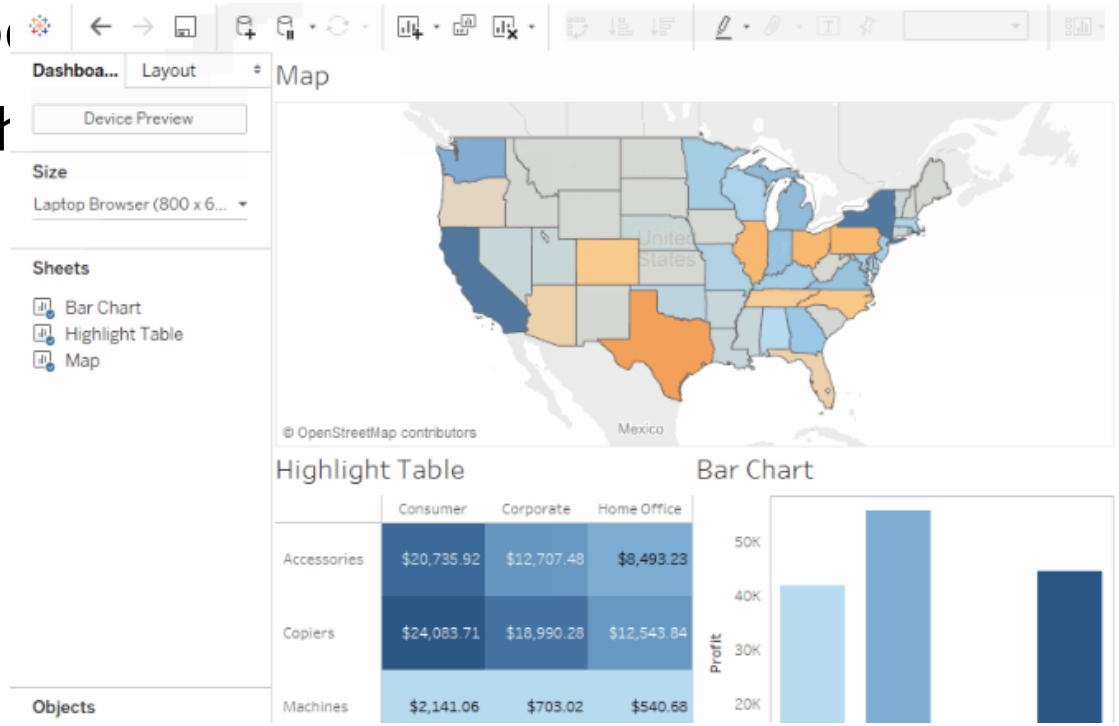
Creating Dashboard

- 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 dashb ded area indicates wh

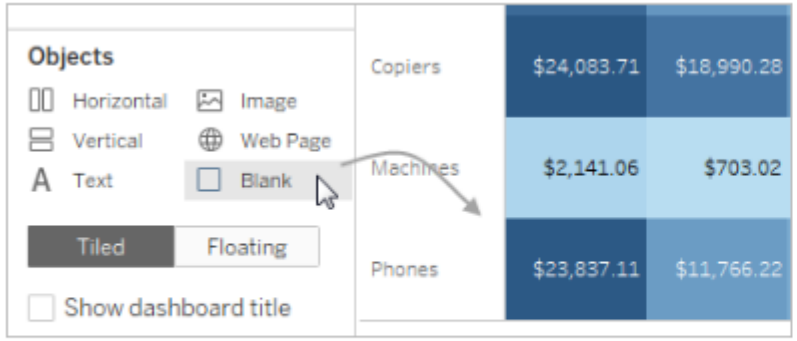


Contd..

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:

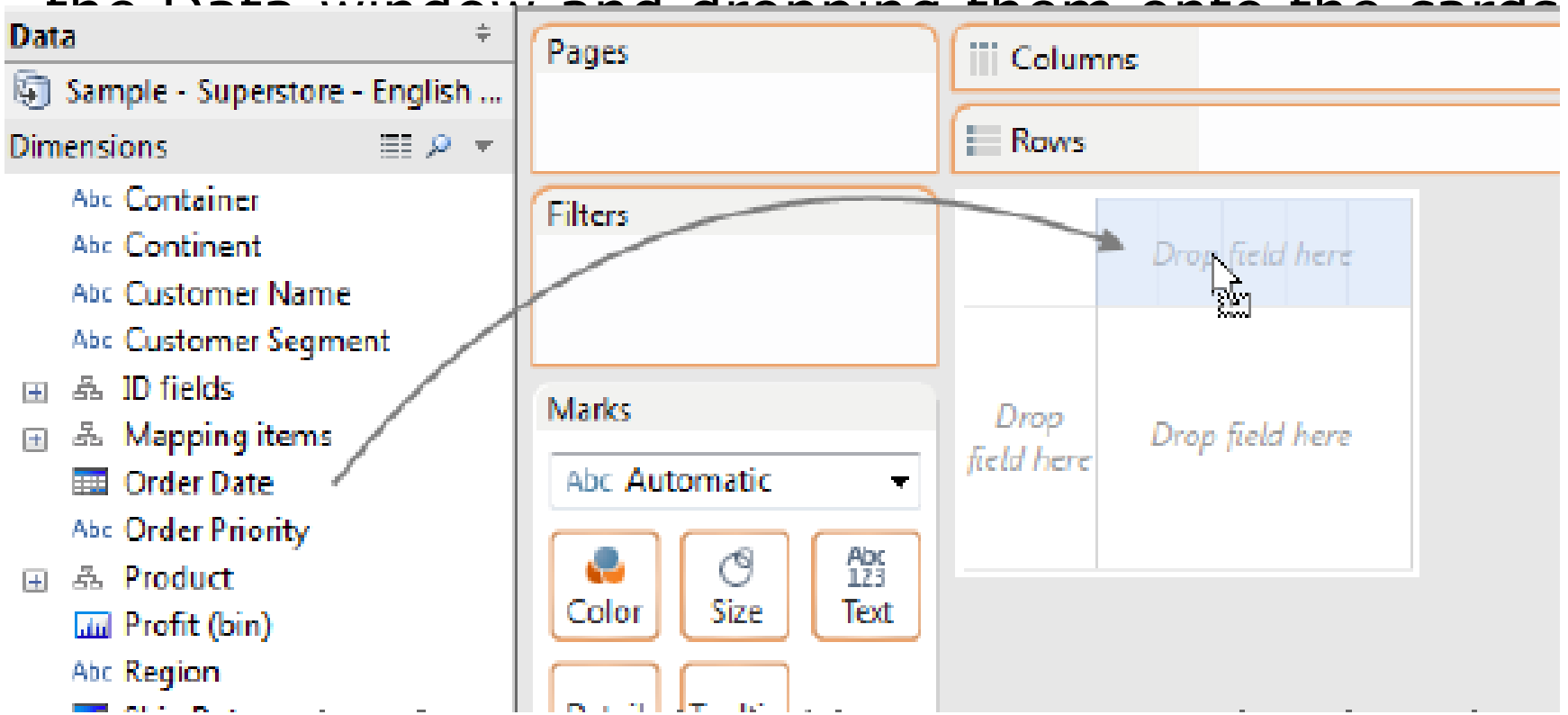


Depending on the object you're adding, you may be prompted for additional information. If you are adding a Web Page object, see Best Practices for Effective Dashboards for tips on web view security options.

Build Data Views (Manual)

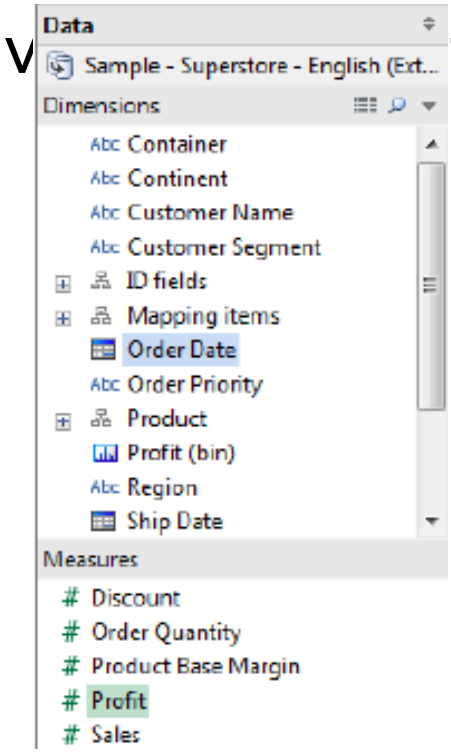
Build Data Views (Manual)

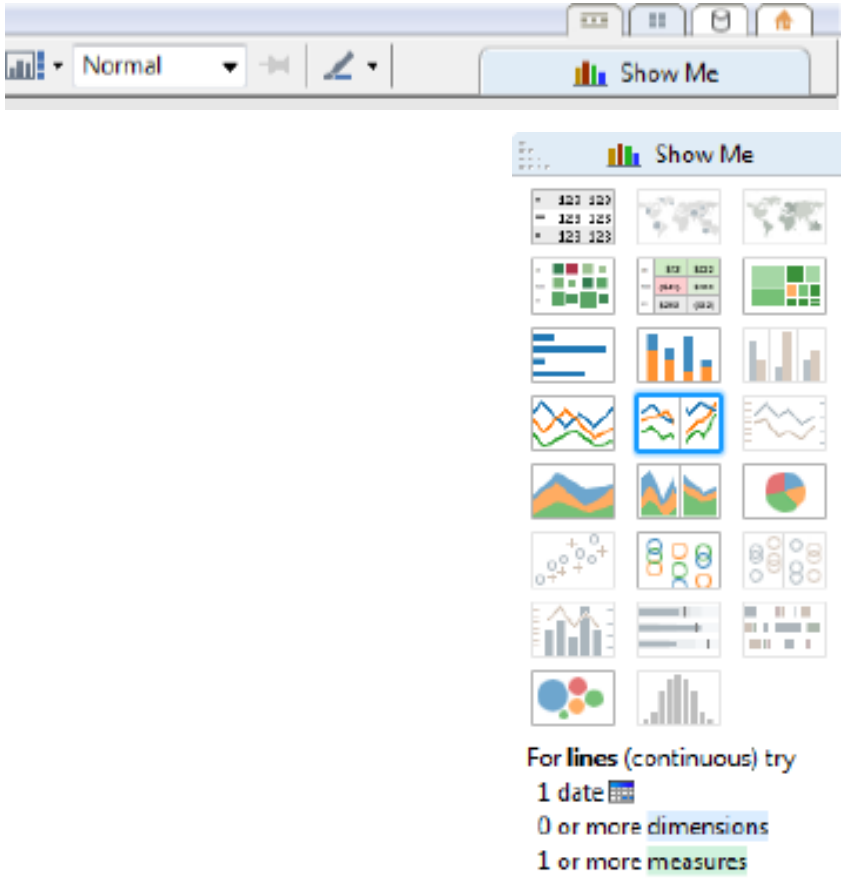
You can build data views by dragging fields from the Data window and dropping them onto the cards



Build Data Views (Automatic)

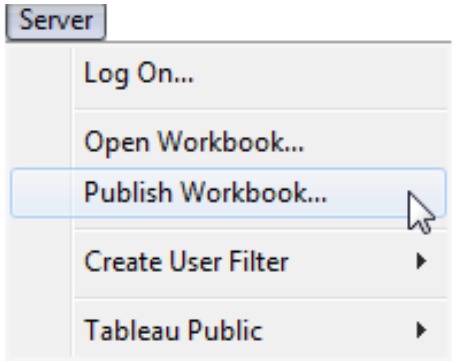
Rather than building views by dragging and dropping fields, you can use Show Me™ to create v ti



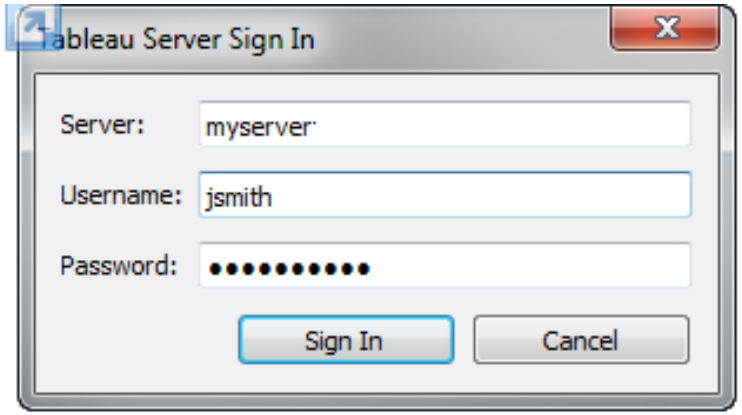


Publish Workbooks to the Server

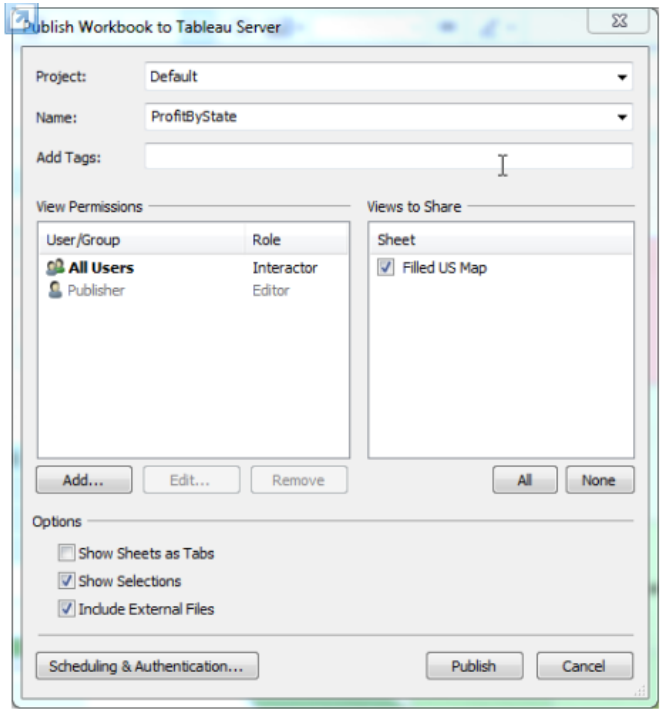
1. Select **Server > Publish Workbook**.



2. If you are not already signed in to Tableau S
3. Next, type your user name and password an



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



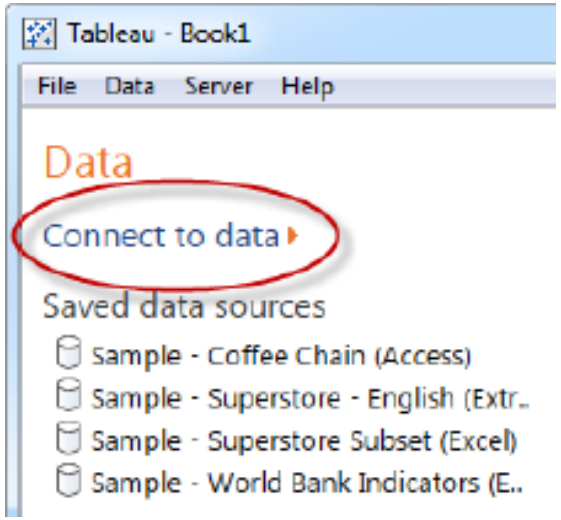
5. Select the project, provide name and select the views to be published and select Publish

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.

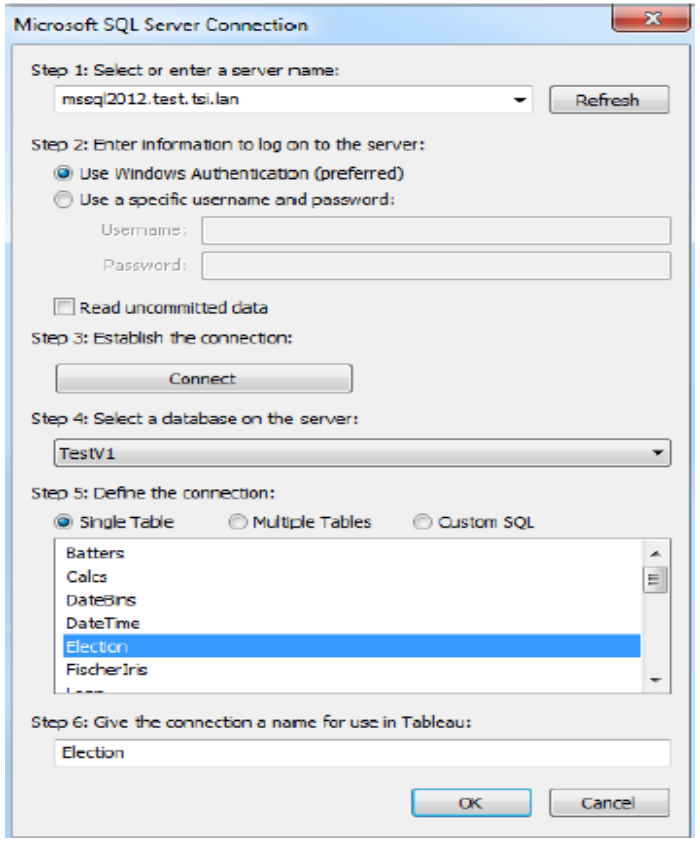
How to Connect to a Data Source

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



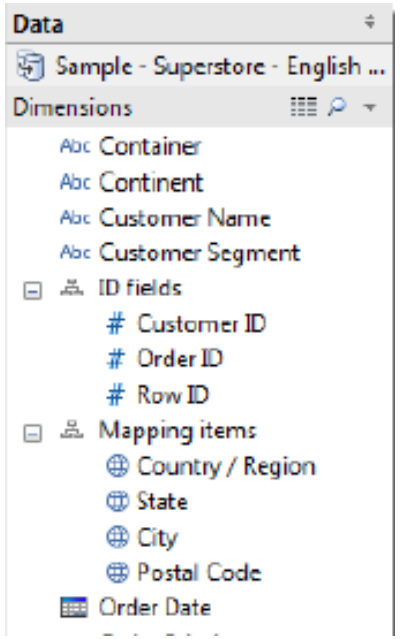
Basic Connection

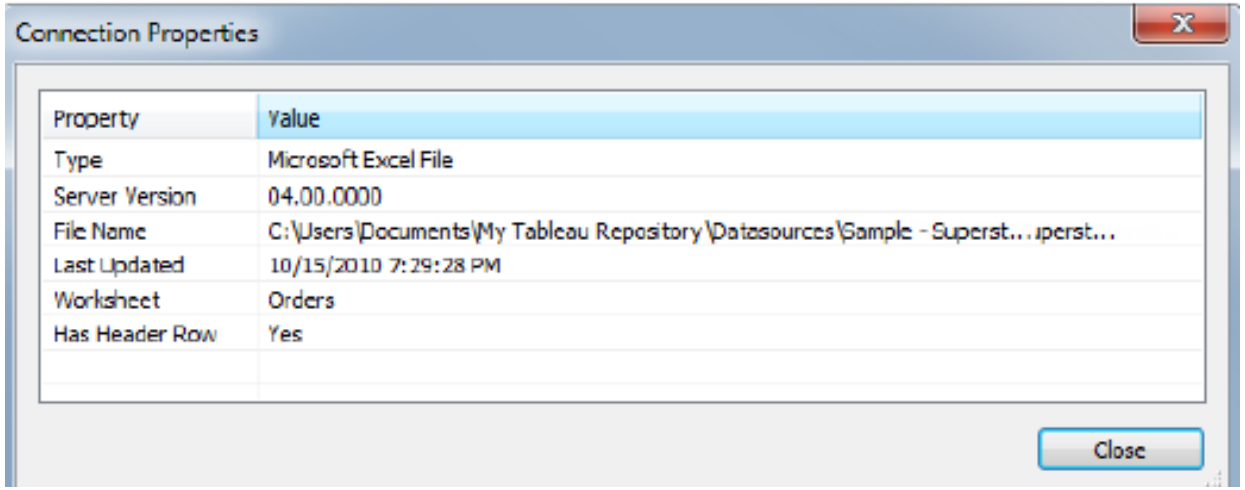
After clicking the connect to data option there would be a new page opening which will ask for the data source credentials.



Basic Connection

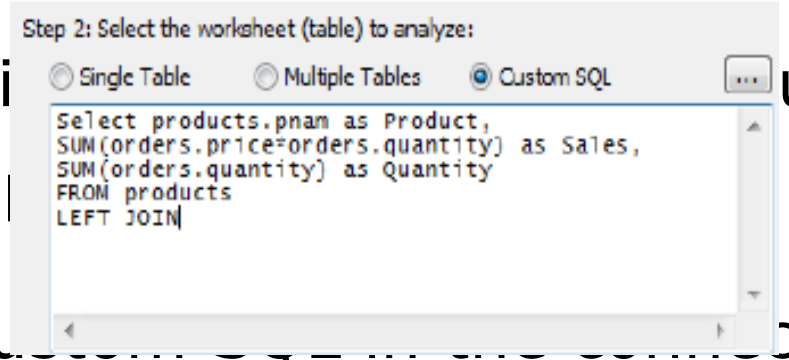
After the successful data source connection, the attributes will be automatically divided into Dimensions and Measures.





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 informati understand how to write SQ



Select Cu ction 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