EXPERIMENT-3

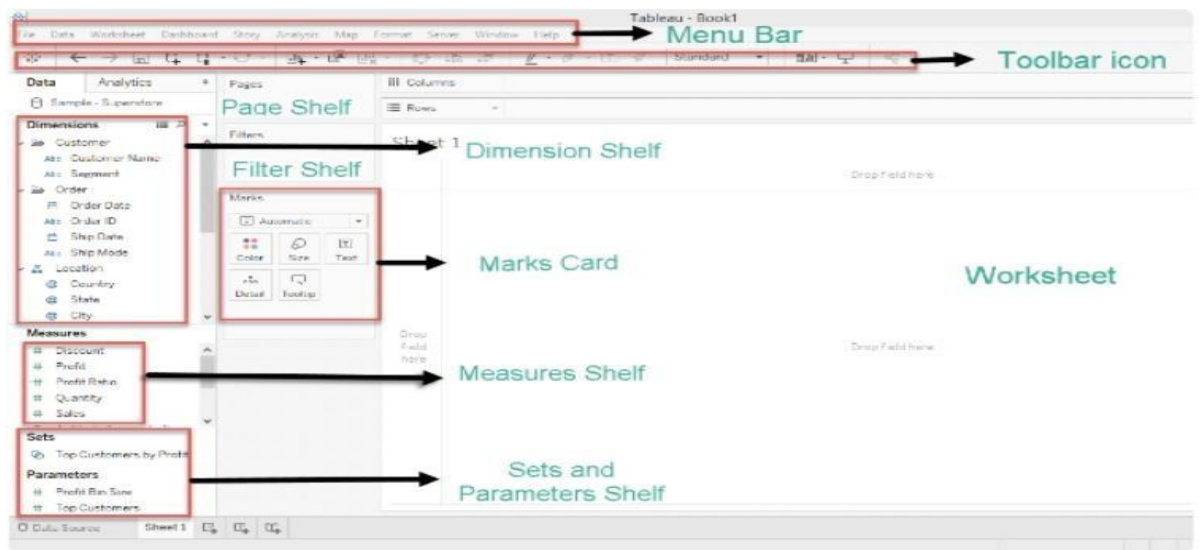**AIM -:** Connect to Dataset in tableau.

REQUIREMENT -: Internet, Ms Word, Tableau

THEORY:

Connecting to a dataset in Tableau and performing experiments involves a series of steps. Here's a general guide to help you through the process:
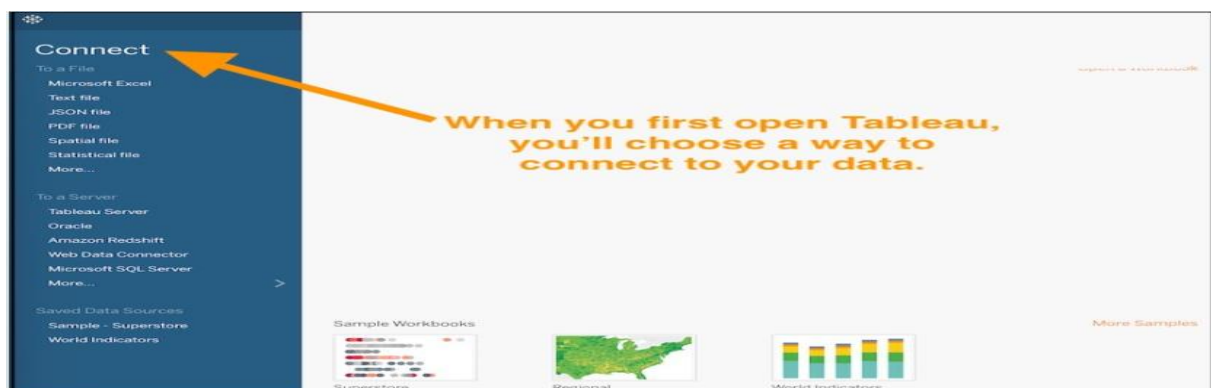

1. Prepare Your Dataset -:

• Ensure your dataset is clean and well-structured. It could be in various formats like Excel, CSV, SQL databases, etc.

## 2. Open Tableau -: Launch Tableau Desktop or Tableau Public.

3. Connect to the Dataset -:

• **Start a New Connection:**

- o On the start page, click on the Connect pane on the left side.

- o Choose the type of connection based on your dataset's format (Excel, Text File, Server, etc.).

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- **Connect to a File:**
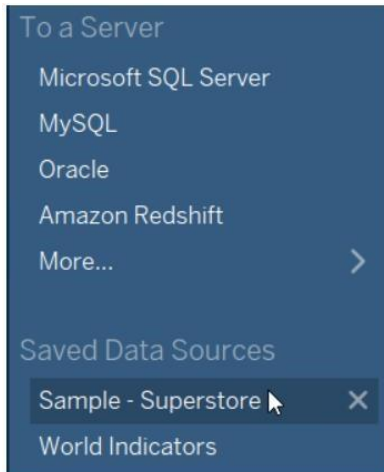
  o For an Excel or CSV file, click on the respective option and navigate to the location of your file. Select the file and click Open.

  - **Connect to a Server:**

  o If you're using a SQL database or another server, select the appropriate server type (e.g., MySQL, SQL Server, etc.), enter the server details, and authenticate as needed.

4. Explore Your Data

- Once connected, Tableau will load the data, and you'll see a preview of your dataset.

- You can drag tables to the canvas to create relationships between them, or simply drag the table to the data source canvas to start analyzing.

5. Create Visualizations

- After loading the data, switch to the Sheet tab.

- Start dragging dimensions (e.g., categories) and measures (e.g., numerical data) to the Rows and Columns shelves.

- Use the Show Me panel on the right to choose different visualization types like bar charts, line charts, scatter plots, etc.

- Experiment with filters, color, size, and labels to refine your visualizations.

6. Perform Analysis

- Use calculated fields to create new data from your existing data.

- Add filters, parameters, and sets to analyze specific subsets of data.

- Experiment with different chart types, dashboards, and story points to find insights in your data.

7. Create Dashboards and Stories

- Combine multiple sheets into a dashboard by selecting Dashboard > New Dashboard.

- Drag sheets into the dashboard area and arrange them as needed.

- For storytelling, create a New Story to compile dashboards and visualizations into a sequence that tells a narrative with your data.

8. Publish and Share

- Once you're satisfied with your analysis, you can publish your workbook to Tableau Server or Tableau Public for sharing.

9. Experiment with Data

- Try different visualization types.

- Use Tableau's analytics pane to add trend lines, forecasts, and reference lines.

- Perform what-if analysis using Tableau's parameter feature.

Conclusion -: This should give you a solid start to connecting to your dataset and performing experiments in Tableau.