

# Collecting and Preparing Data for Tableau Desktop

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## GETTING YOUR DATA INTO TABLEAU



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# Course Information



**Awareness of Tableau Desktop's primary purpose**



**General use of the interface**



**Basic analytics acumen**



**Version 2019.2**



# Course Overview



**Getting your data into Tableau Desktop**

**Preparing data for use**

**Joining multiple sources of data**

**Extracting data for performance**

**Blending supplementary data sources**



# Overview



When to use file-based connections

Types of supported files

How to connect files to Tableau



# File-based Connections



When to use  
file-based  
connections?

When data is not going to change often  
When you don't have access to a server  
For one-time or ad-hoc analyses  
Data is not sensitive



# Types of Supported Files

## Common File Types

Excel

JSON

Text

PDF

## Other File Types

Spatial

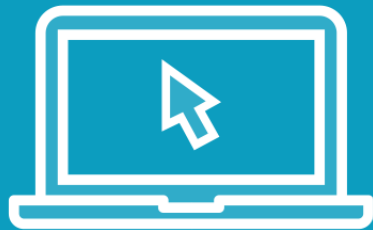
TDE/Hyper

Statistical

TDS/TDSX



# Demo



In this demo, you will learn –

## How to connect files to Tableau

- Microsoft Excel
- Text files
- JSON files
- PDF files





# Microsoft Excel



# Text File



# JSON File



PDF File



# Other file-based Connections



## Spatial File

Contains geographic data that identifies the location of features or boundaries on earth



# Before you Connect

Make sure to include all of the following files in the same directory:

**For Esri shapefiles:** The folder must contain a .shp, .shx, .dbf, and .prj files.

**For Esri File Geodatabases:** The folder must contain the .zip of the File Geodatabase's .gdb.

**For MapInfo tables:** The folder must contain a .TAB, .DAT, .MAP and .ID or .MID and .MIF file.

**For KML files:** The folder must contain the .kml file. (No other files are required.)

**For GeoJSON files:** The folder must contain the .geojson file. (No other files are required.)

**For TopoJSON files:** The folder must contain the .json file. (No other files are required.)



You can only connect to point geometries, linear geometries, and polygons in current versions of Tableau

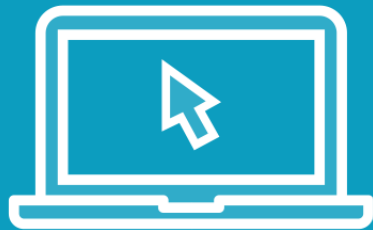




If your data does not display  
accent marks on characters  
properly, check to make sure  
the file is UTF-8 encoded



# Demo



In this demo, you will learn –

**How to connect to other file-based data**

- Spatial files
- Statistical files
- TDE/Hyper
- TDS/TDSX



# Statistical File



TDE/Hyper



TDS/TDSX



# Server-based Connections



When to use  
server-based  
connections?

**Frequent data updates/schema changes**

**Need real-time data**

**Server resources are available**

**Data is sensitive**



Before you  
Begin

**Make sure to gather connection information such as:**

- Name of the server that hosts the database you want to connect to
- Name of the database
- Username and password
- Know if a server you are connecting to is a SSL server





# Common Servers

Tableau  
Server

Amazon  
Redshift

Cloudera  
Hadoop

Exasol

MySQL

Google  
Sheets

Teradata

Salesforce



# Demo



In this demo, you will learn -

## How to connect to server-based data

- Tableau Server
- Cloudera Hadoop
- Google Sheets



# JDBC Connector

**Connect**

To a File

- Microsoft Excel
- Text file
- JSON file
- PDF file

Search

- Tableau Server
- Amazon Athena
- Amazon Aurora
- Amazon EMR Hadoop Hive
- Amazon Redshift
- OneDrive
- Oracle
- Oracle Eloqua
- Pivotal Greenplum Database
- PostgreSQL
- Presto
- Salesforce
- SAP HANA
- ServiceNow ITSM
- SharePoint Lists
- Snowflake
- Spark SQL
- Teradata
- Vertica
- Web Data Connector
- Other Databases (JDBC)
- Other Databases (ODBC)

**Other Databases (JDBC)**

URL:

Dialect:

Enter information to log on to the server:

Username:

Password:

Properties File:  **Browse...**

**Sign In**



# ODBC Connector

Connect

Search

Other Databases (ODBC)

Connect Using

Generic ODBC requires additional configuration for publishing to succeed. Select DSN (data source name) for cross-platform portability. A DSN with the same name must be configured on Tableau Server.

☒ DSN:

☐ Driver:

Connection Attributes

Server:

Port:

Database:

Username:

Password:

String Extras:

OneDrive

Oracle

Oracle Eloqua

Pivotal Greenplum Database

PostgreSQL

Presto

Salesforce

SAP HANA

ServiceNow ITSM

SharePoint Lists

Snowflake

Spark SQL

Teradata

Vertica

Web Data Connector

Other Databases (JDBC)

Other Databases (ODBC)

Sign In

# Web Data Connectors



# Summary



In this module, we learnt –

**File-based connections**

**Server-based connections**

**Web data connectors**



## Things to Remember

**Gather connection  
information**

**Install drivers**

**Use saved data sources**

**JDBC and ODBC connectors  
are available**

