POWERING POTENTIAL

INTRODUCTION TO Tableau

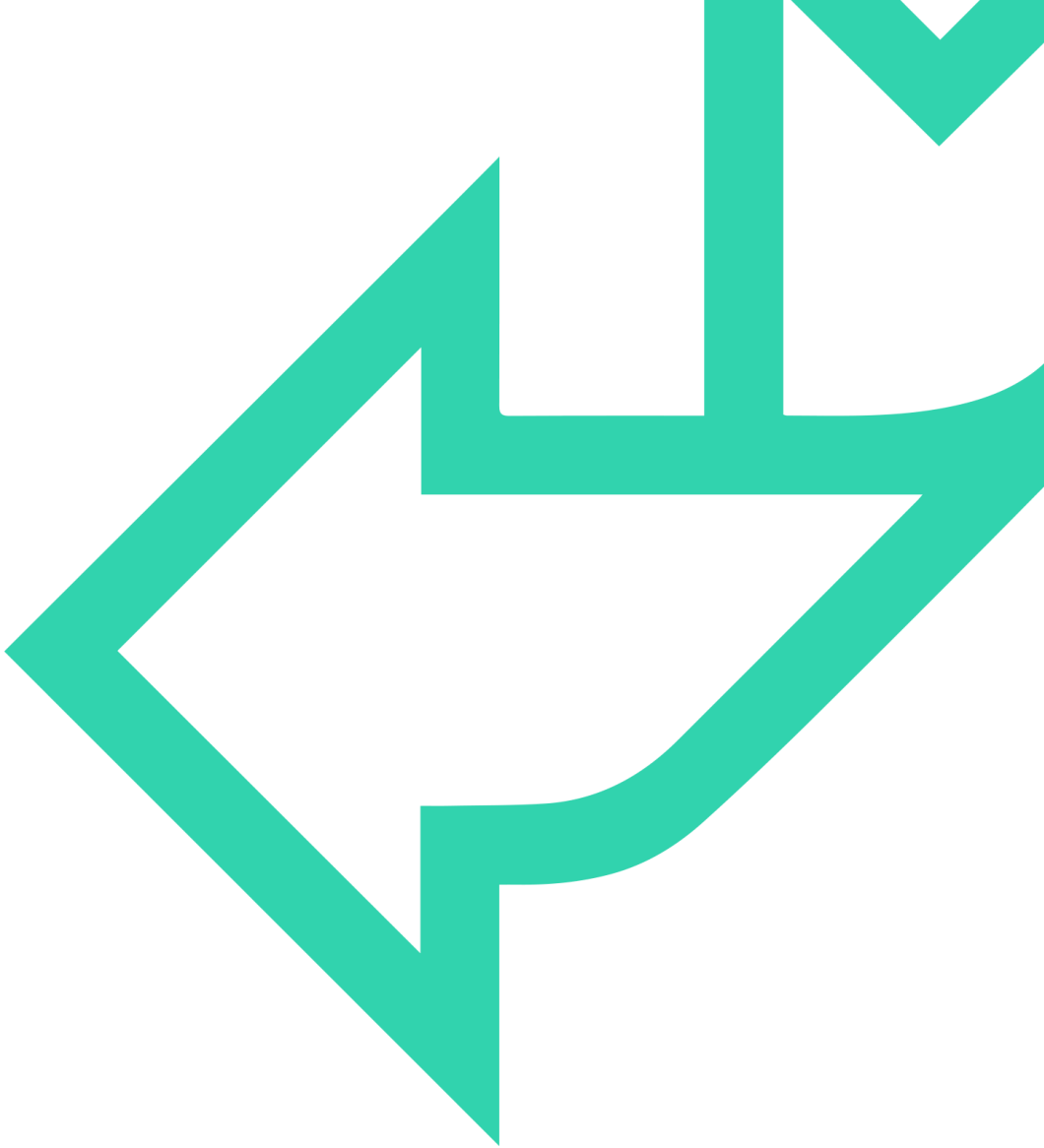


TABLEAU OVERVIEW

An ecosystem of products from Tableau Software focused on rich and interactive data visualisation

Provides capabilities to:

→ connect to multiple data sources.

→ reformat, restructure, and cleanse data.

→ build data relationships.

→ illustrate data insights through a variety of visualisations.

→ share results with a user community.

TABLEAU ECOSYSTEM

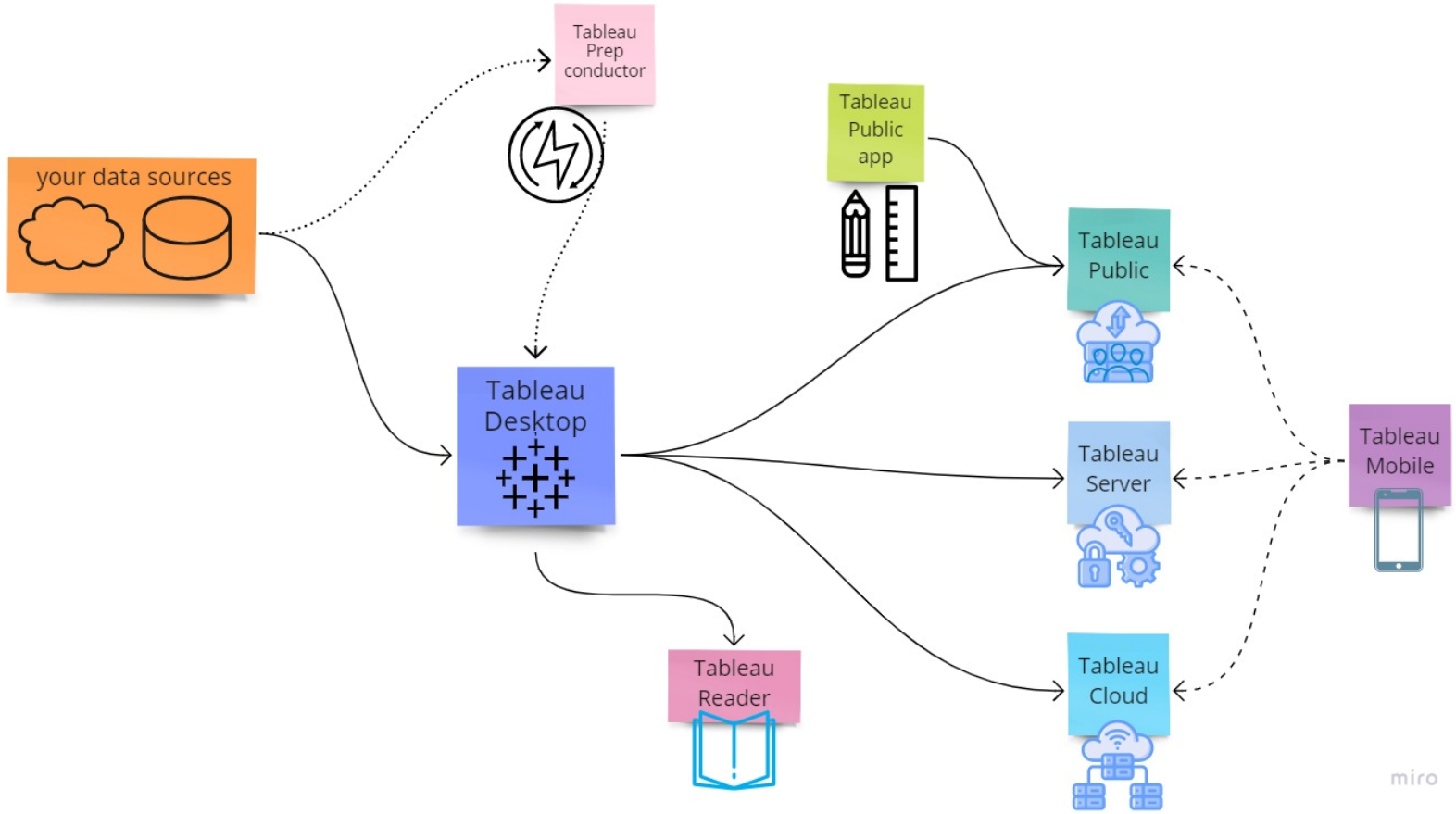


TABLEAU DESKTOP OVERVIEW

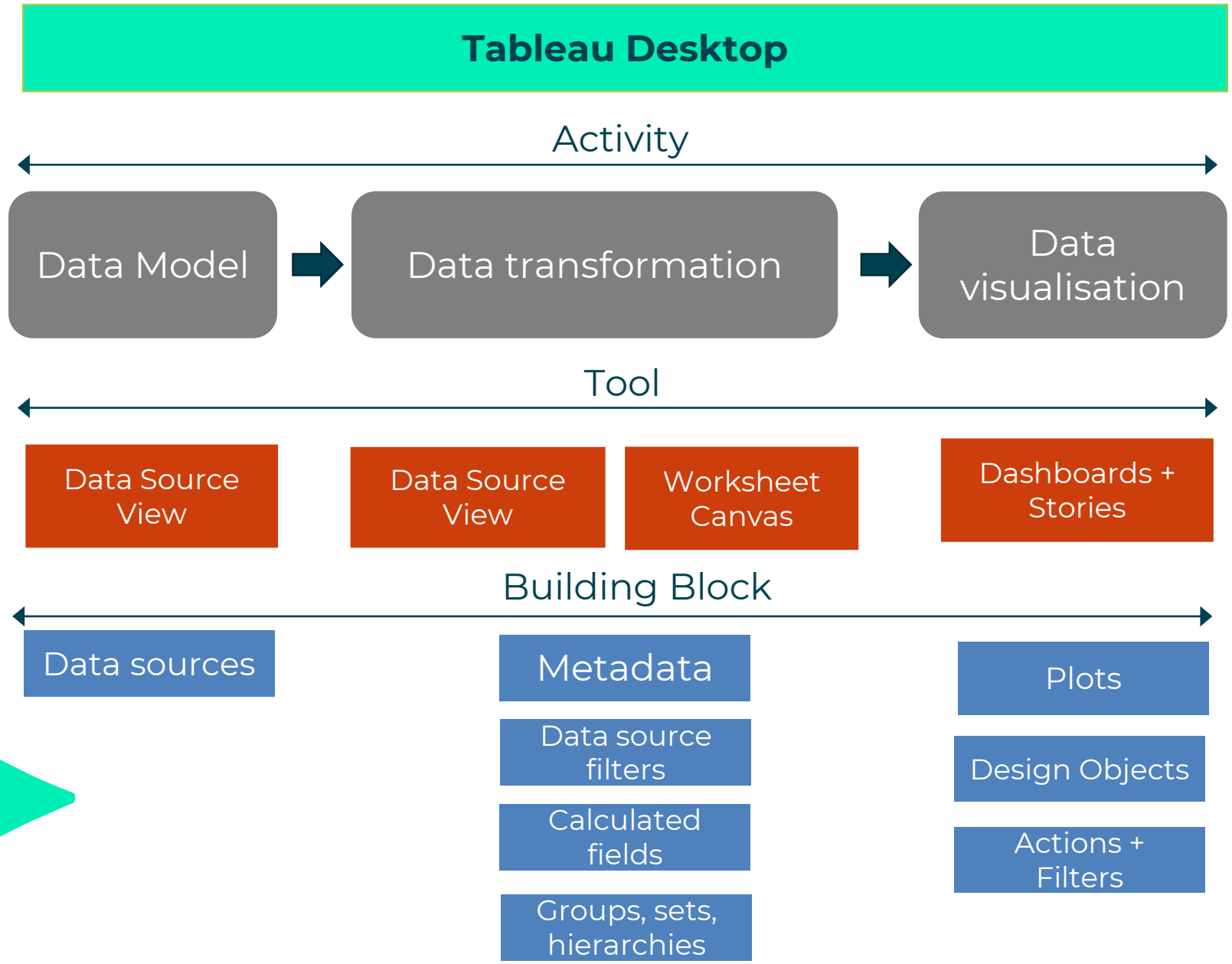


TABLEAU CREATOR HIERARCHY

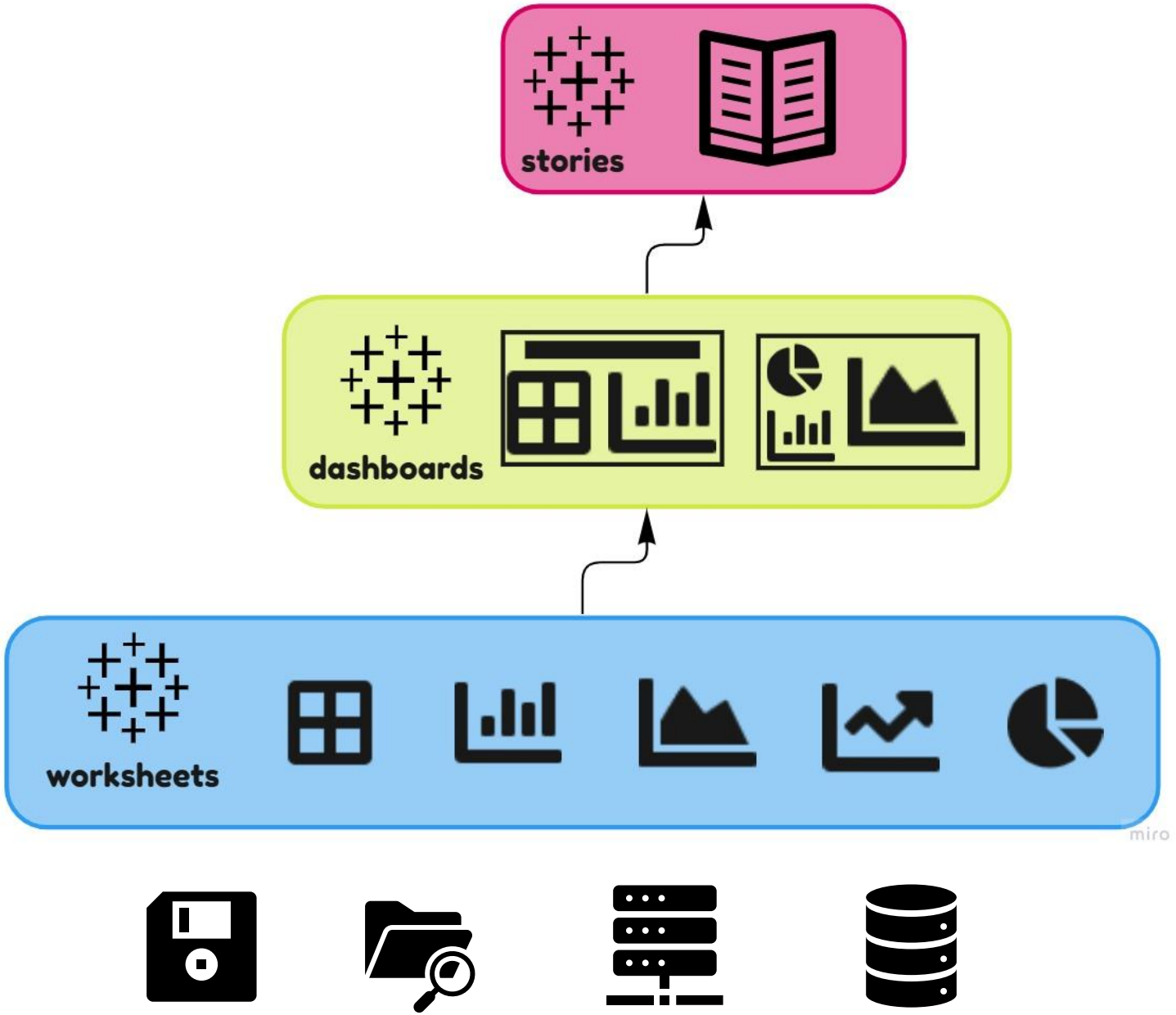
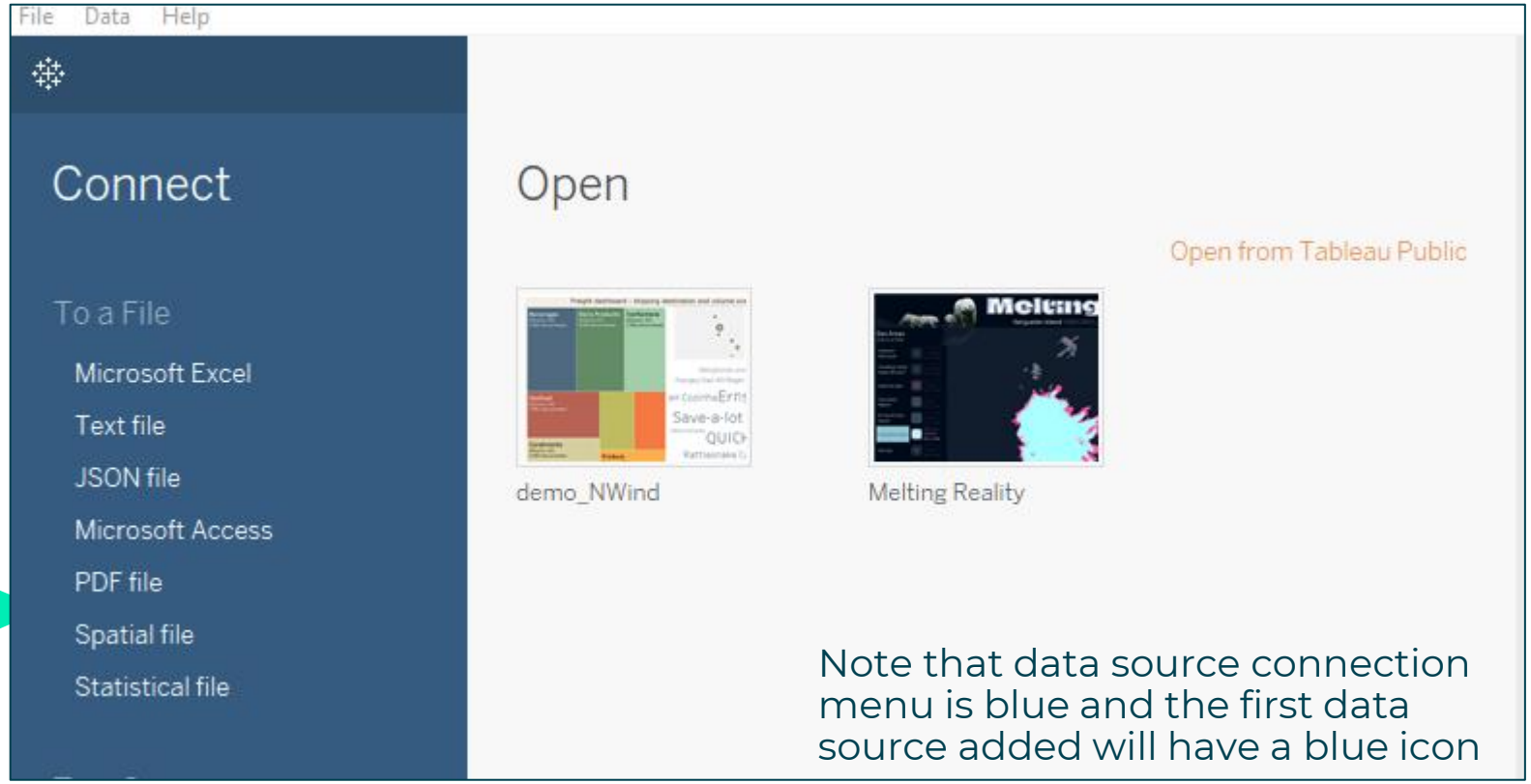


TABLEAU WORKED EXAMPLE

Let’s try a group demo!

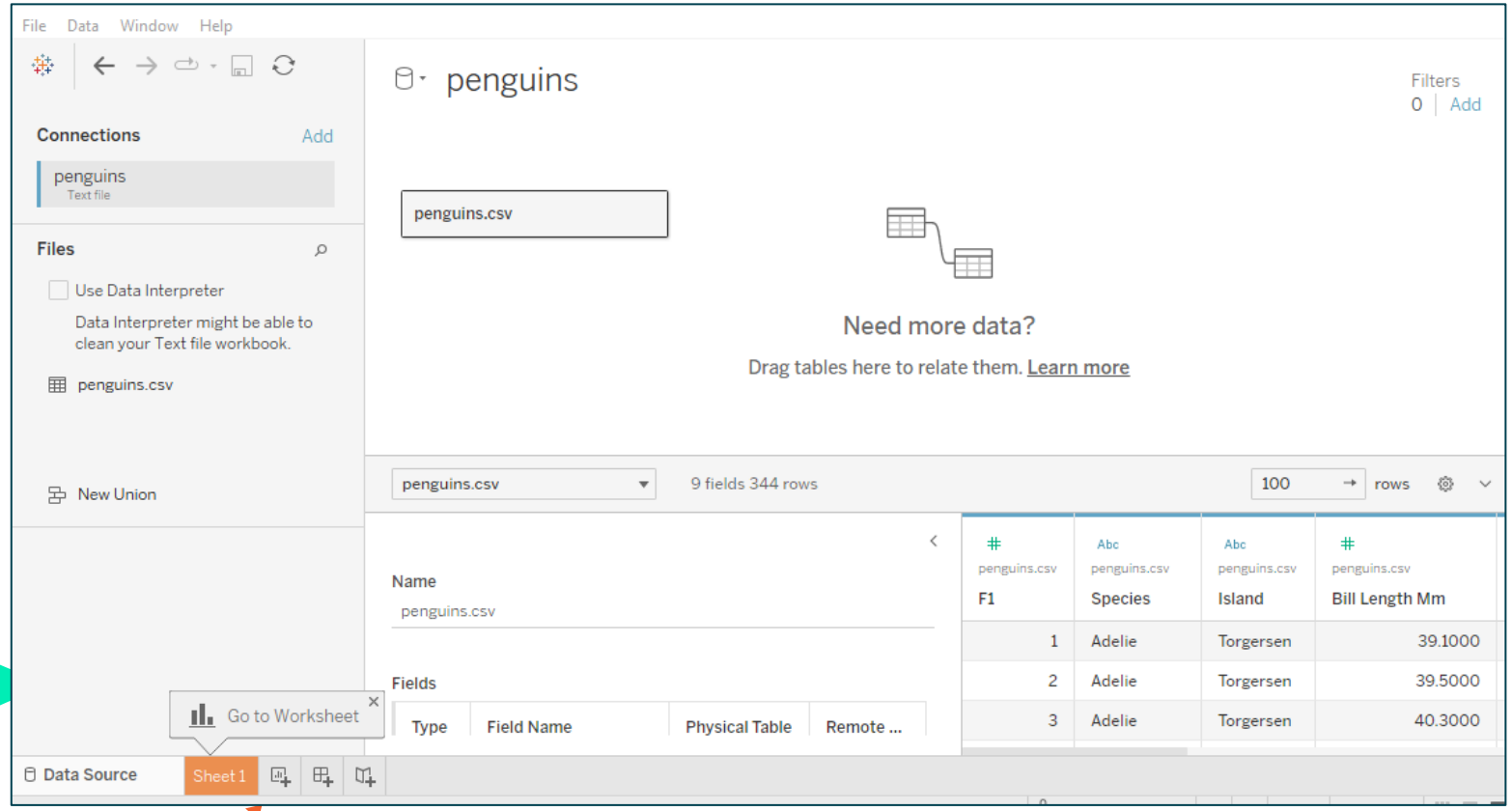
INITIAL NAVIGATION (1)

Opening Tableau takes you to this landing page. This is where data sources are connected to or existing tableau workbooks are opened.



INITIAL NAVIGATION (2)

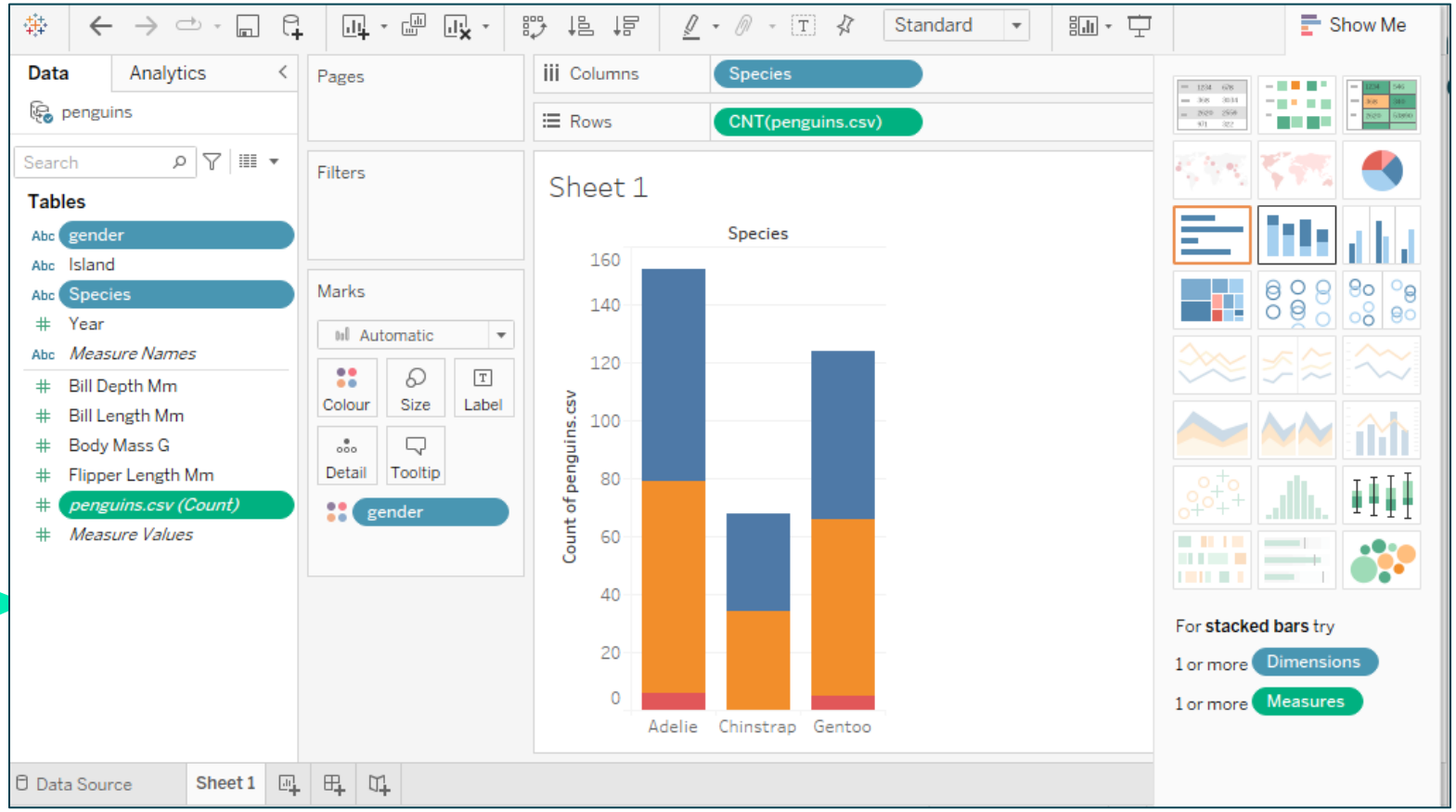
Once we have connected to a data source the view will change and a preview of the data will be available or the tables in the data source will show



Follow this prompt to go to the design canvas

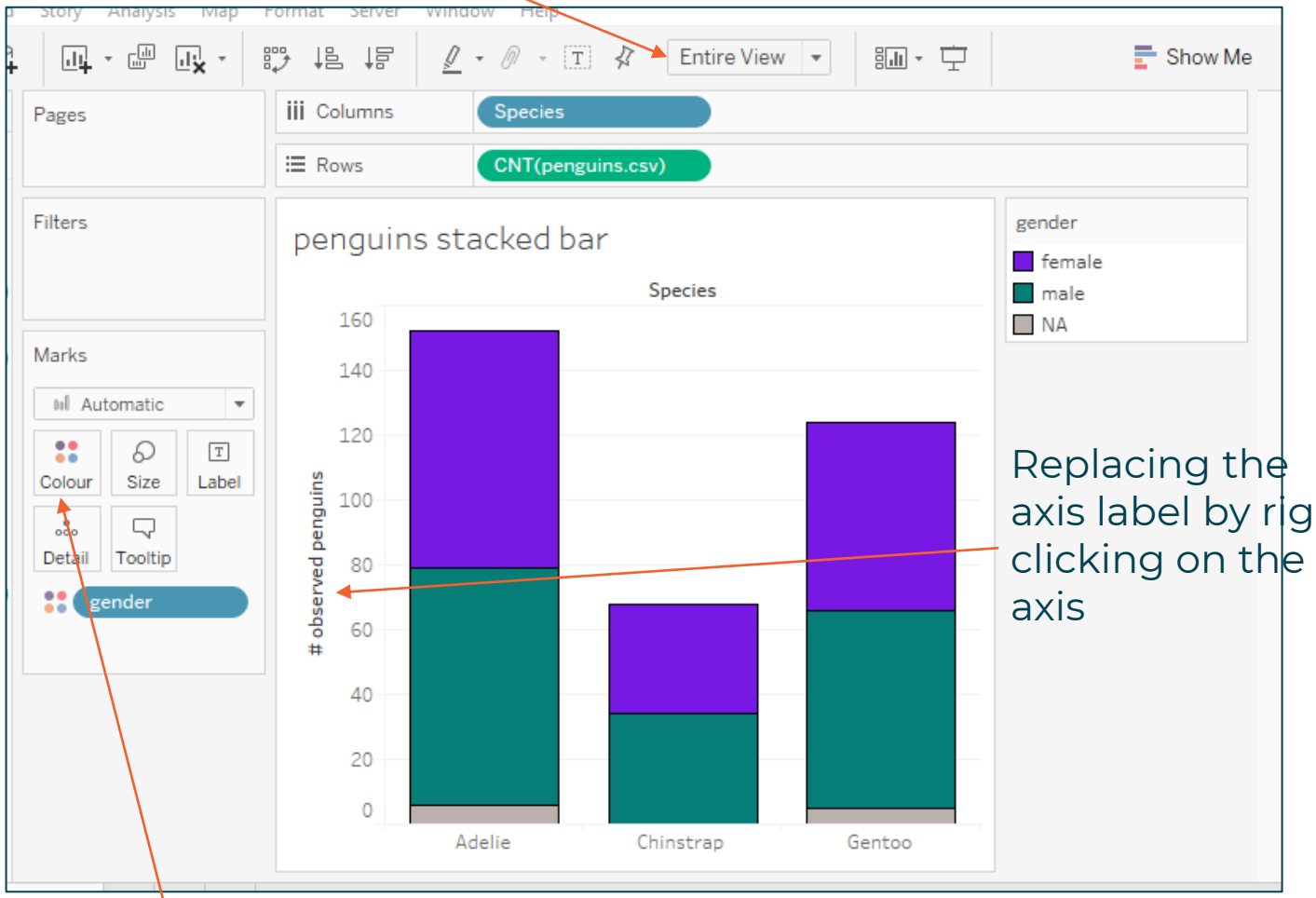
WORKSHEET VIEW NAVIGATION

Selecting the desired data fields + the Show Me menu quickly creates the basic visualisation which can then be amended using the marks card, filters, rows and columns.



WORKSHEET VIEW EDITING

Setting the fit to Entire View makes better use of space

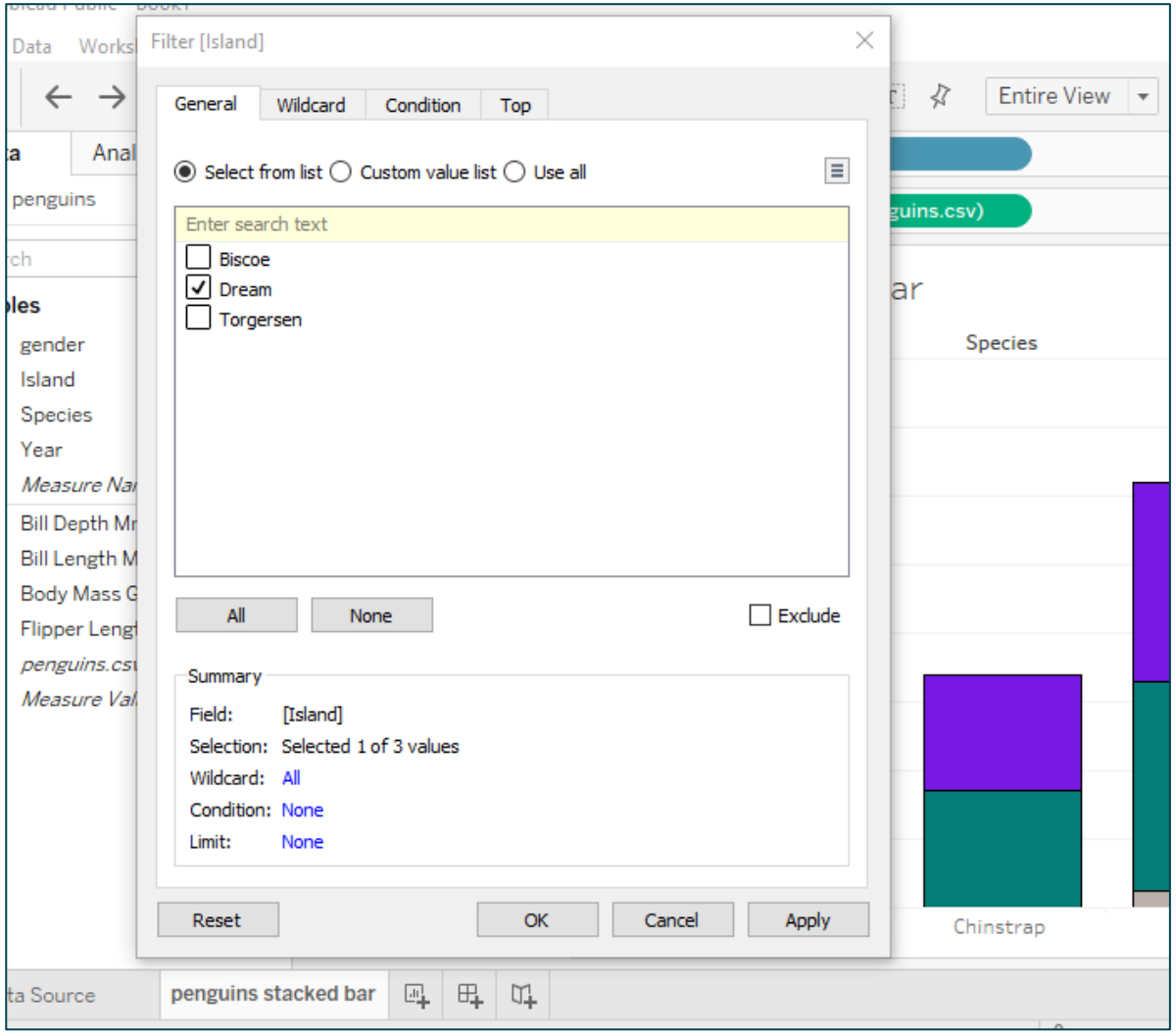


Replacing the axis label by right clicking on the axis

Using the marks card to edit the colours of the fields in the plot, plus adding a border for emphasis

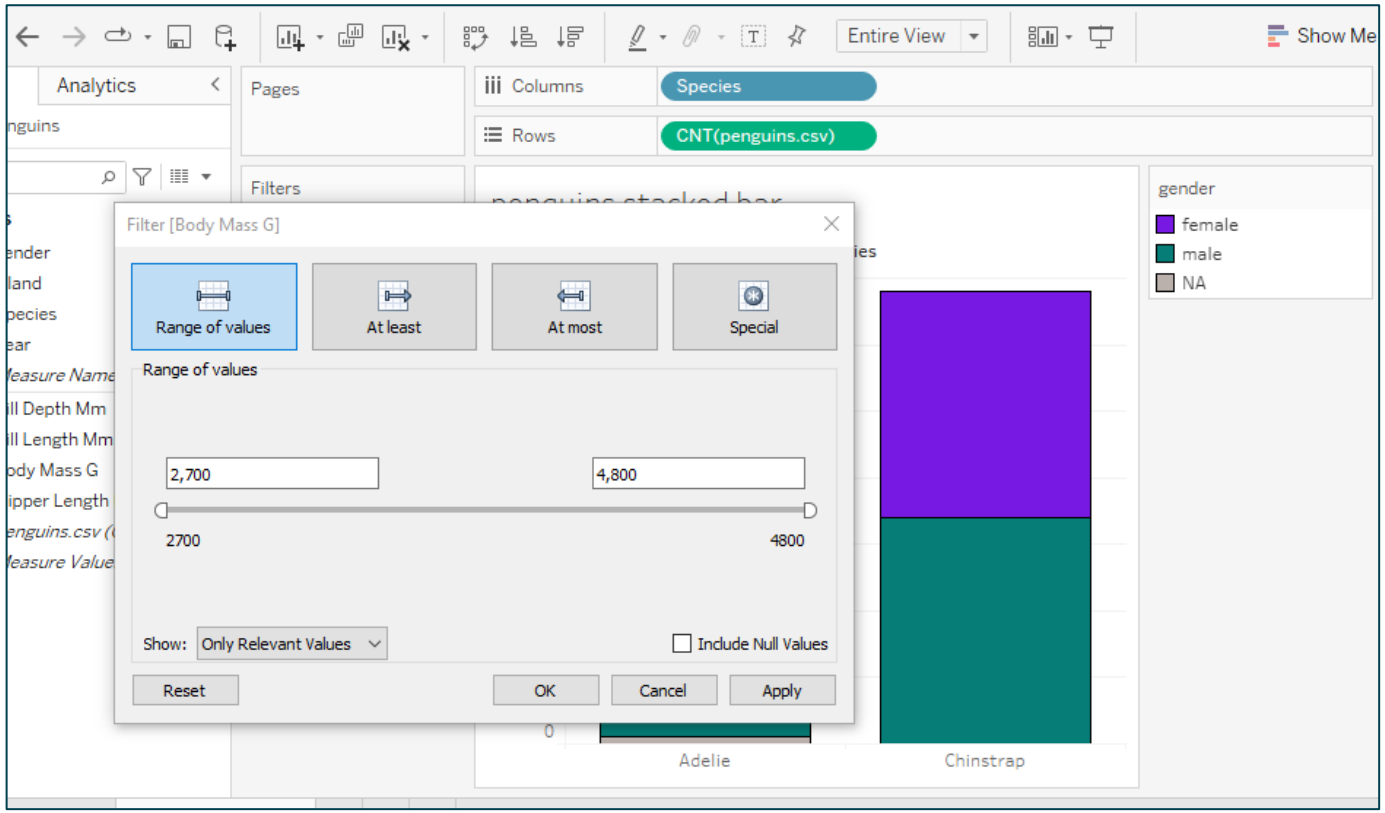
WORKSHEET VIEW FILTERING

Filters can be applied to the visualisation by dragging fields from the Tables area to the Filter shelf.



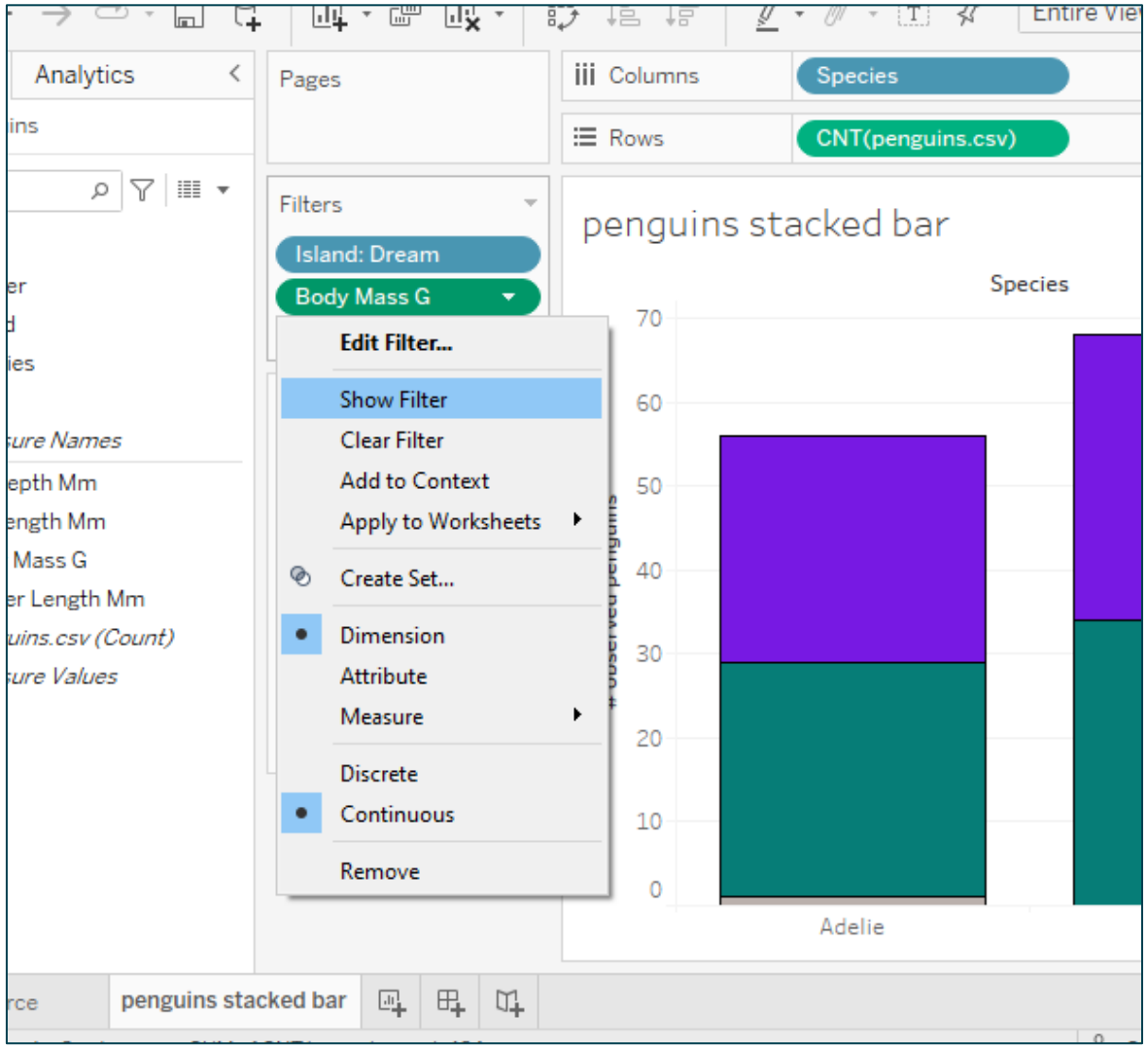
WORKSHEET VIEW FILTERING

Filters look and behave different if they are from green continuous fields, to if they are from blue discrete fields



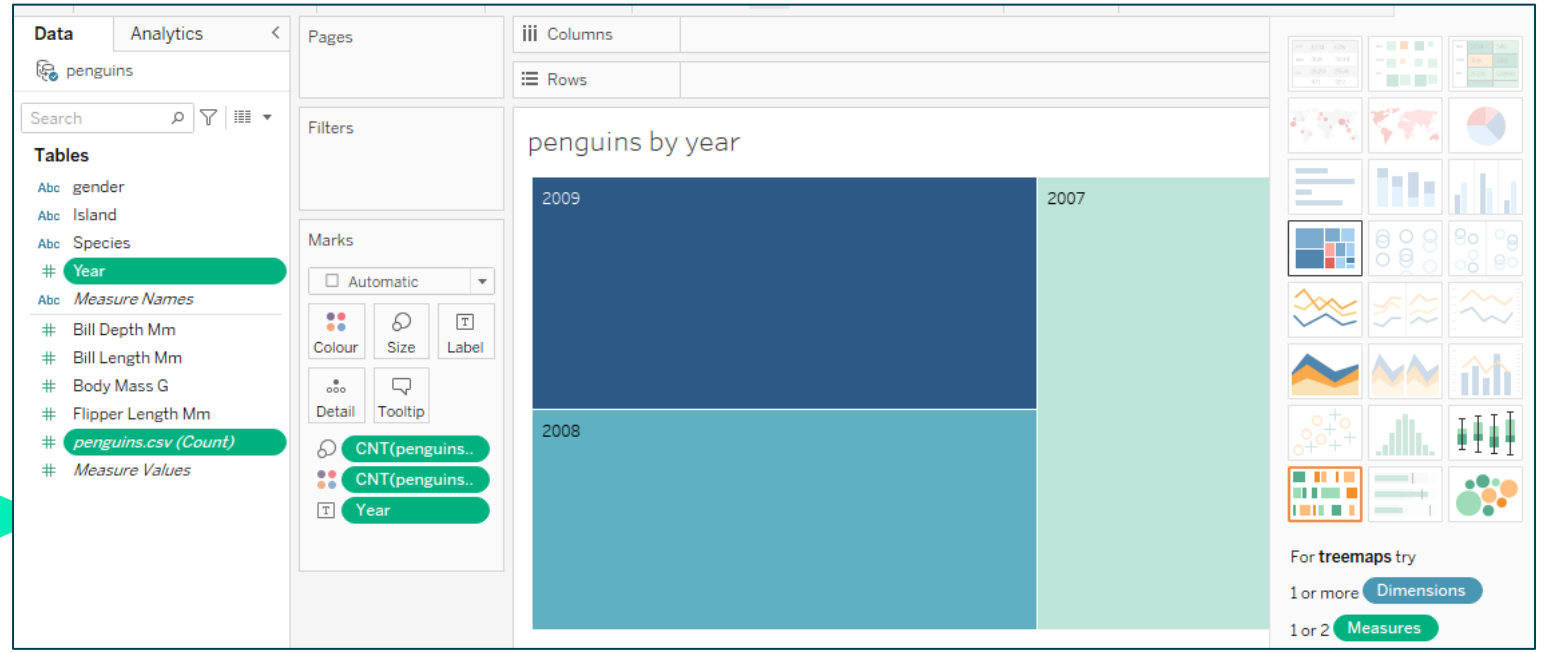
WORKSHEET VIEW FILTERING

Select Show Filter to make the plot interactive



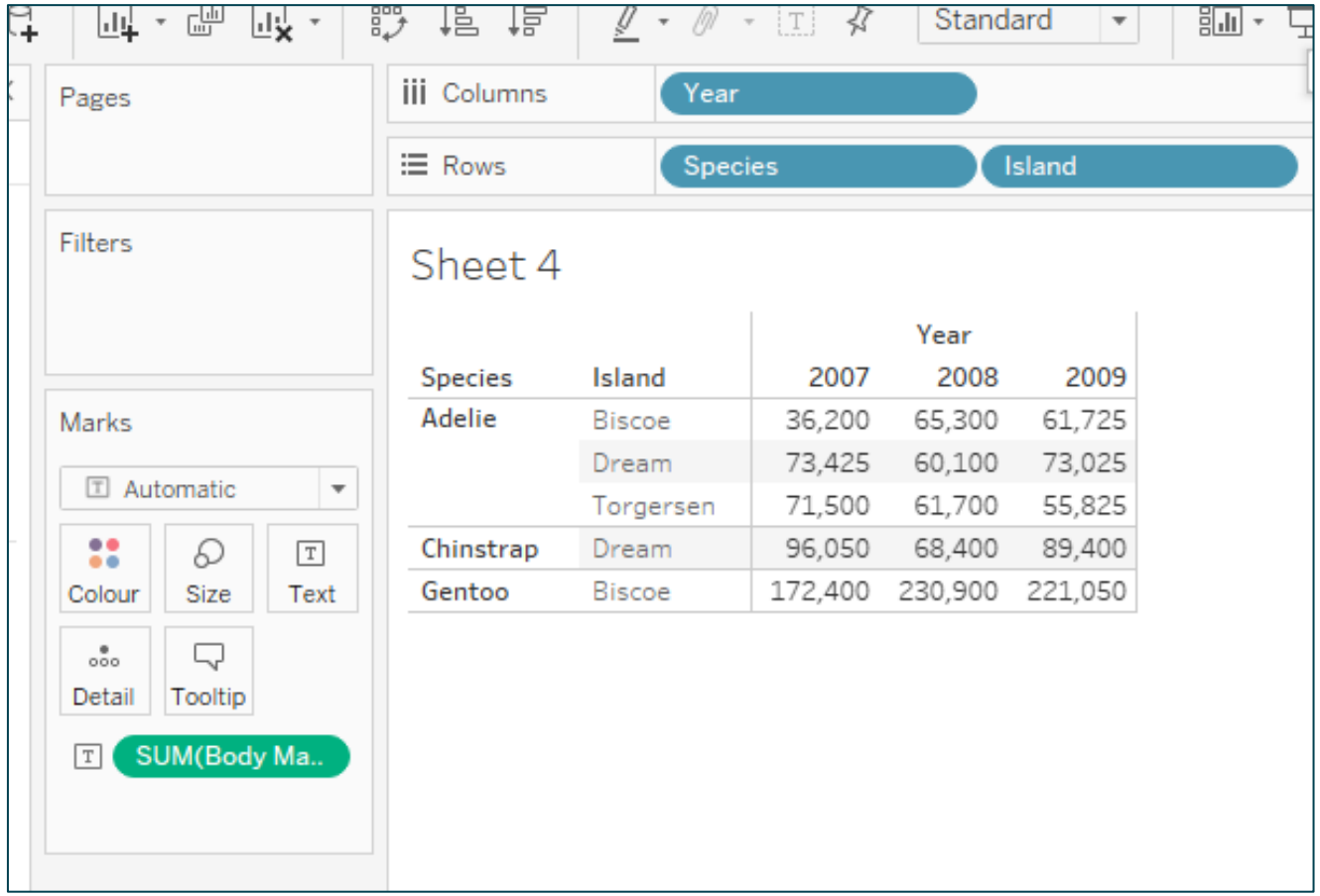
NEW WORKSHEET

Using the navigation footer, create a new worksheet to add a new viz



BUILD VIZ MANUALLY

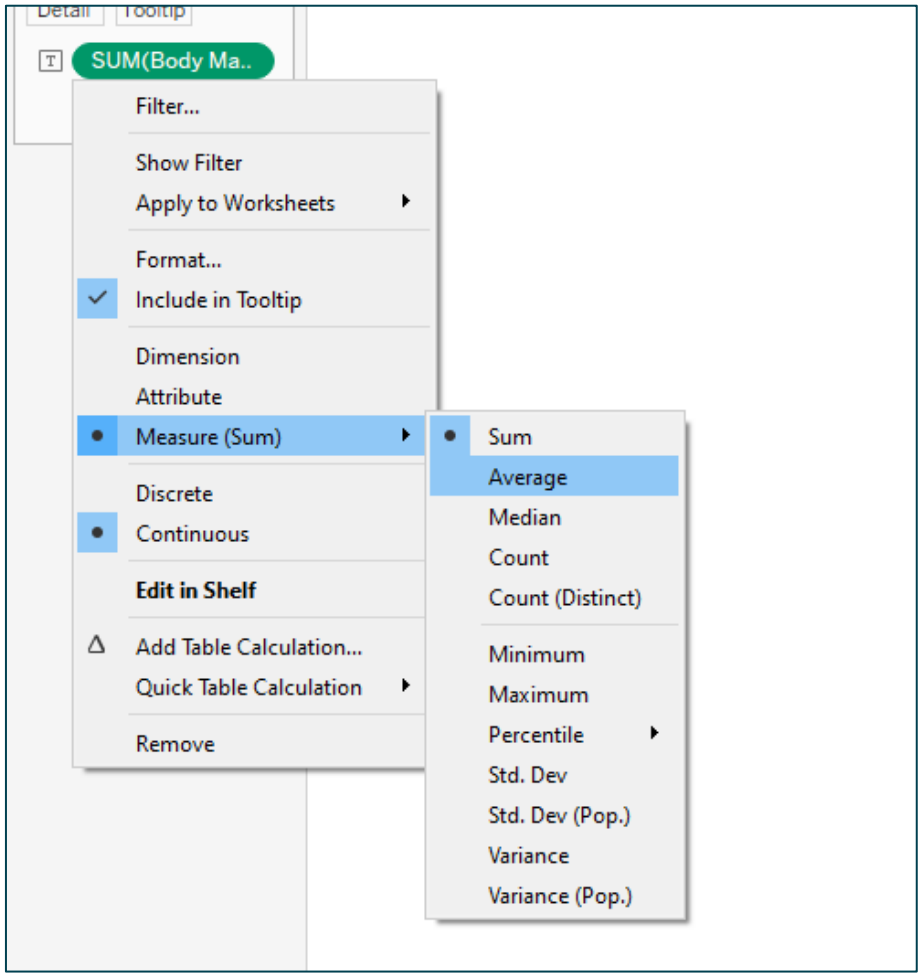
It is also easy to build a viz without the Show Me menu, using instead the rows, columns and marks card



Species	Island	Year 2007	2008	2009
Adelie	Biscoe	36,200	65,300	61,725
	Dream	73,425	60,100	73,025
	Torgersen	71,500	61,700	55,825
Chinstrap	Dream	96,050	68,400	89,400
Gentoo	Biscoe	172,400	230,900	221,050

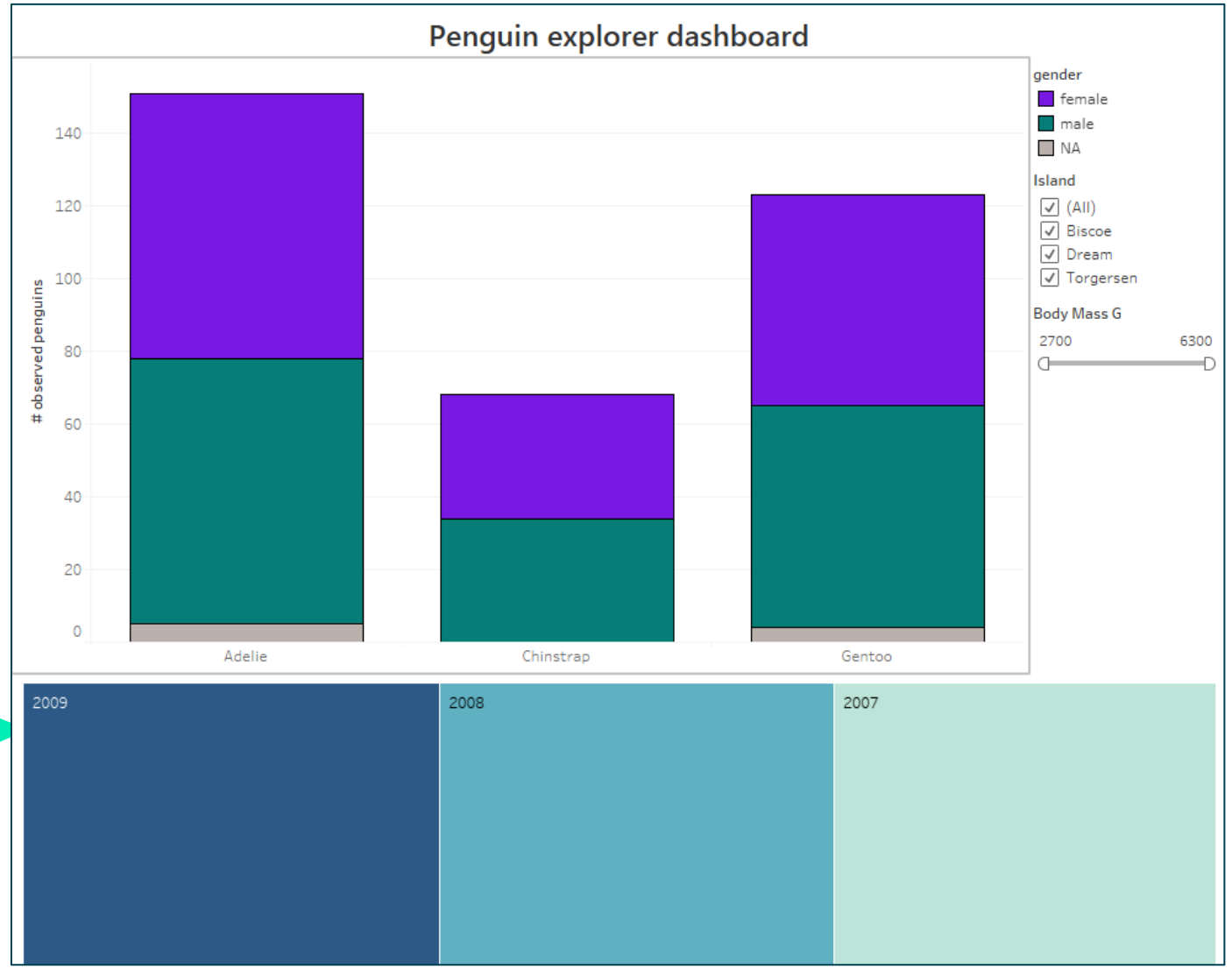
CHANGE AGG. TYPE

Once a green continuous field (measure) is in the viz, the aggregation type can be altered to what makes more sense in the view.



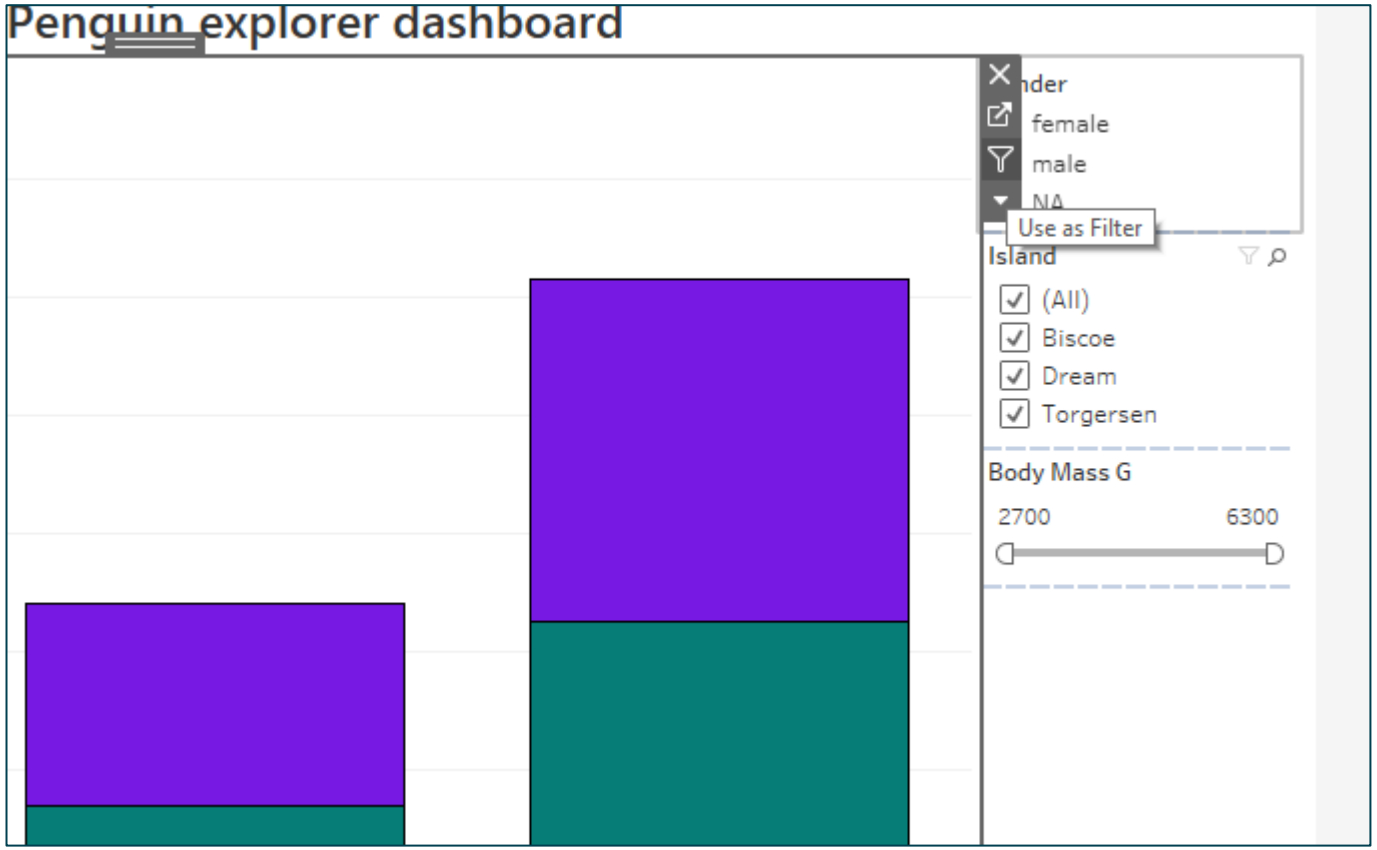
DASHBOARD ASSEMBLY

- Go to new Dashboard and give it a title
- Place chosen vizzes & filters in the dashboard



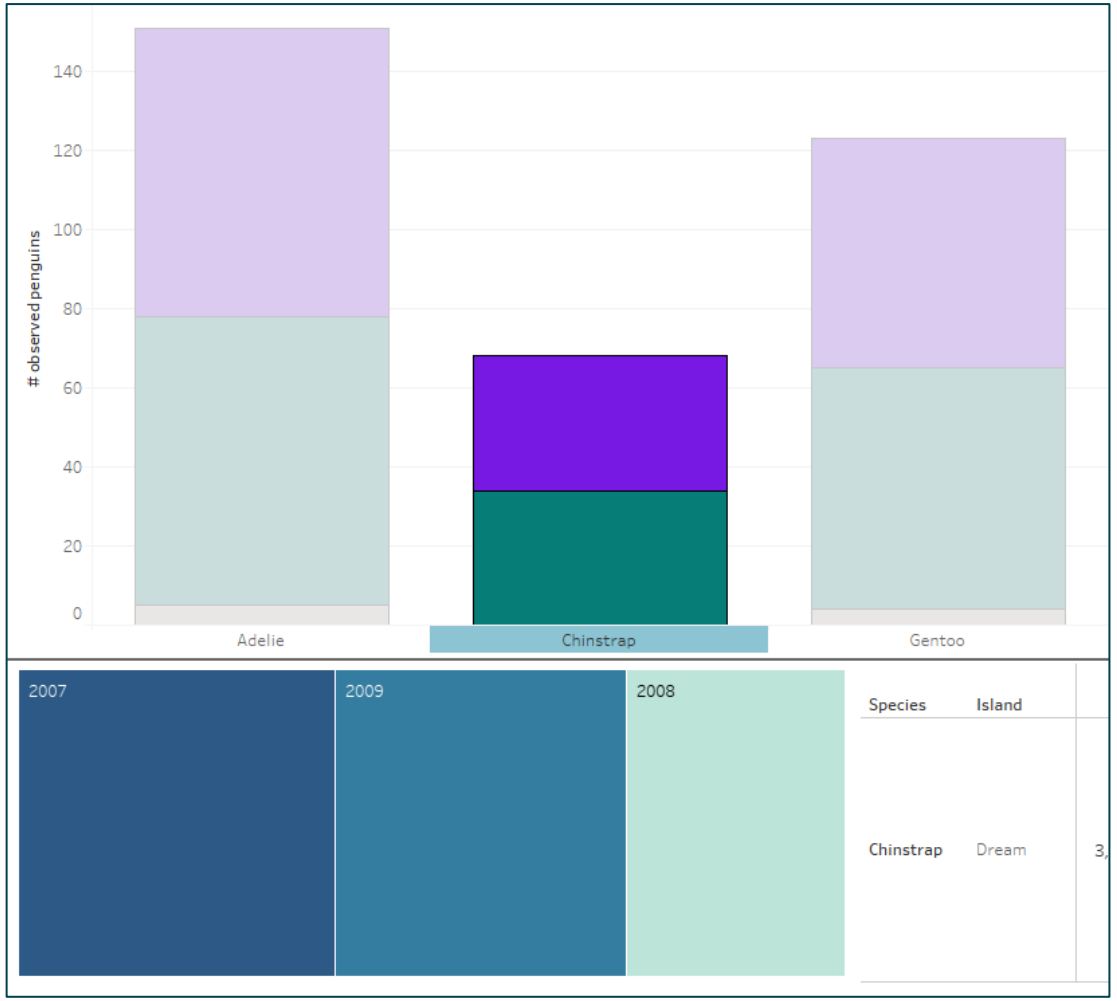
DASHBOARD FILTERING

Add a filter from one visualisation to the remainder of the dashboard using the funnel symbol on the top right of each plot. Now the bar chart will drive the other views.



DASHBOARD FILTERING

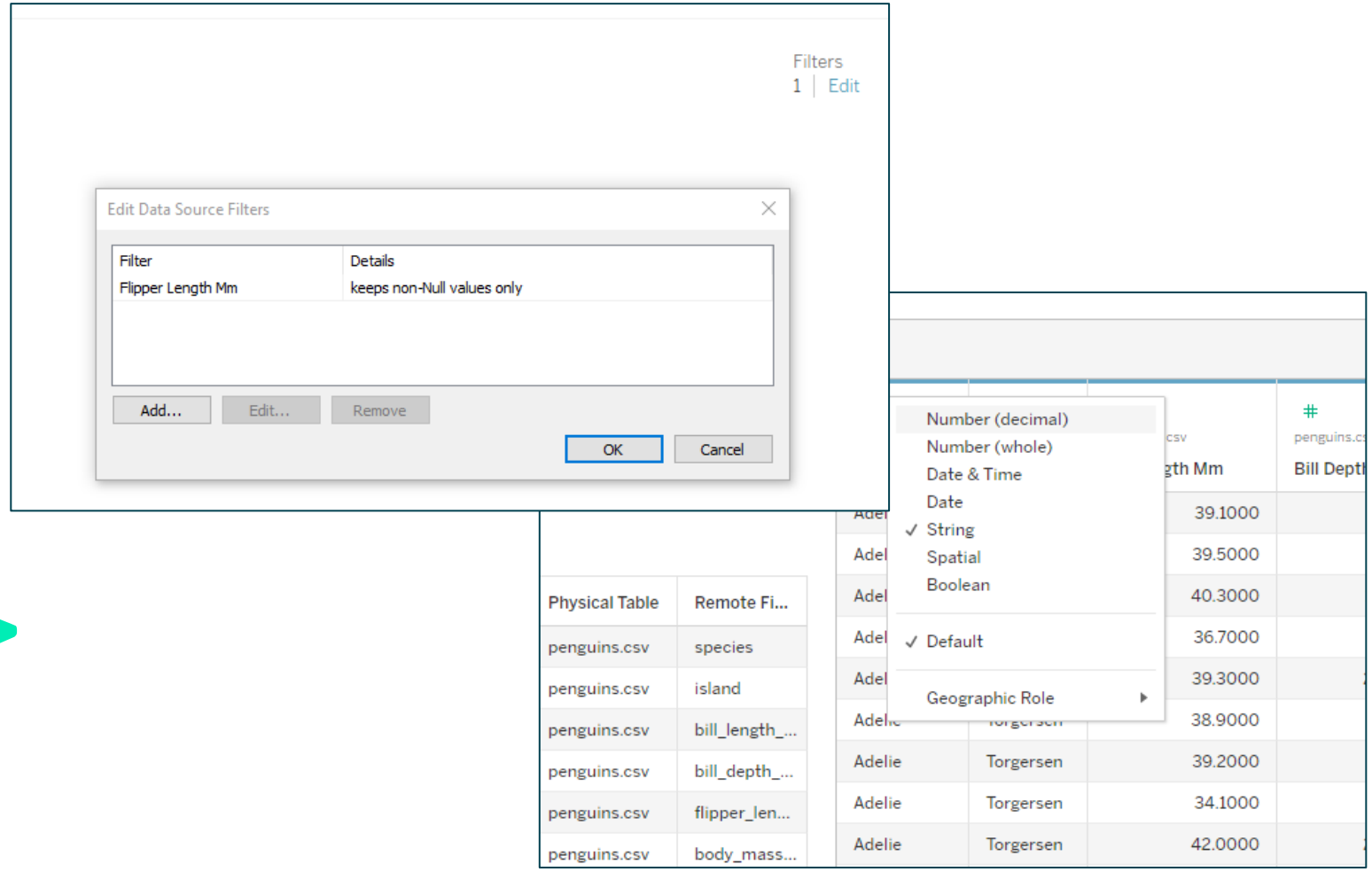
Ensure that when testing dashboard actions there is a viz in the dashboard which will obviously change when the filter is applied



DATA SOURCE VIEW FILTERING

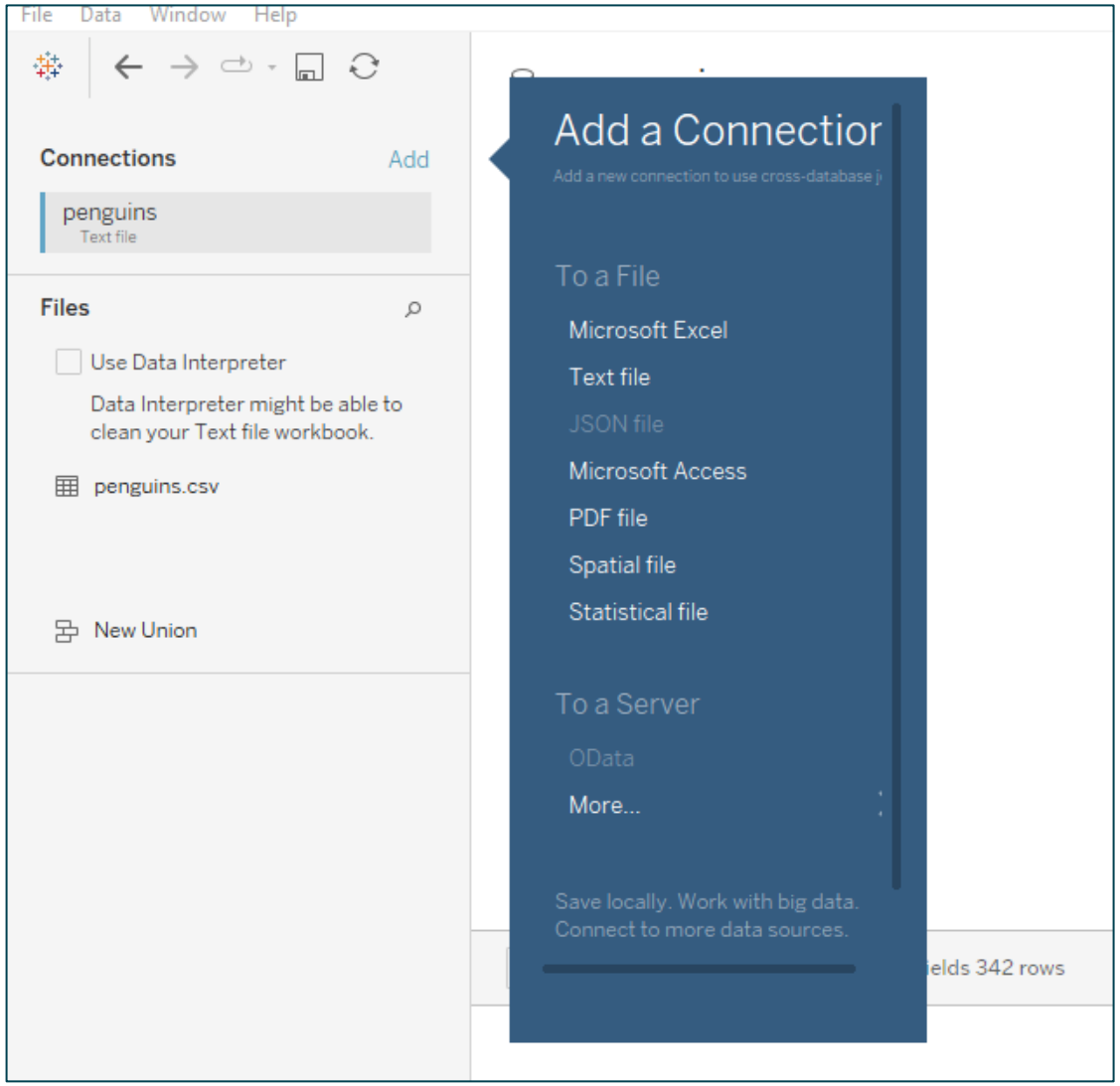
The Data Source View can be accessed at any time by selecting the first tab on the footer navigation

From this view data source filters can be added, field types can be changed and the data can be reshaped



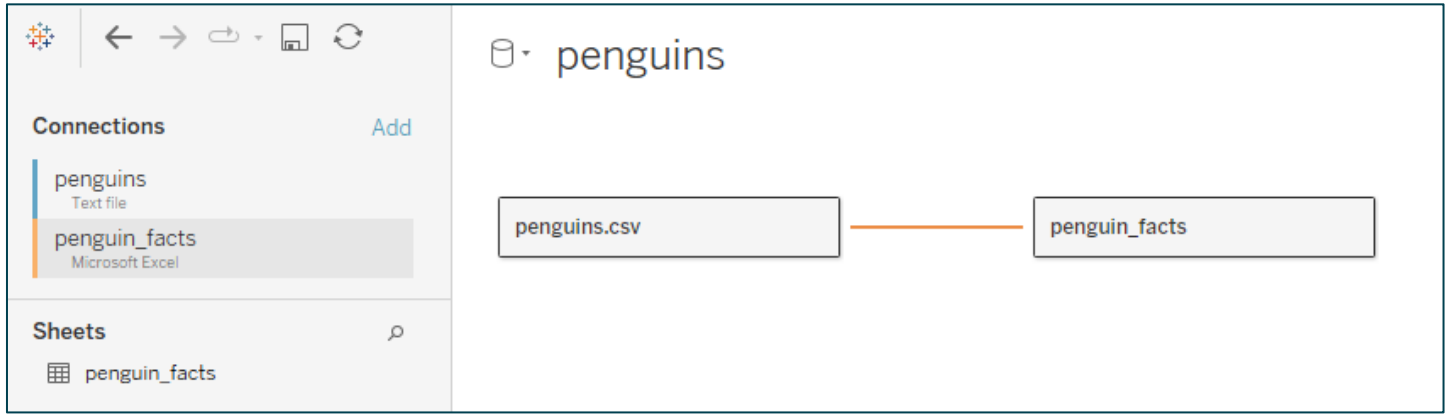
ADD NEW DATA SOURCE

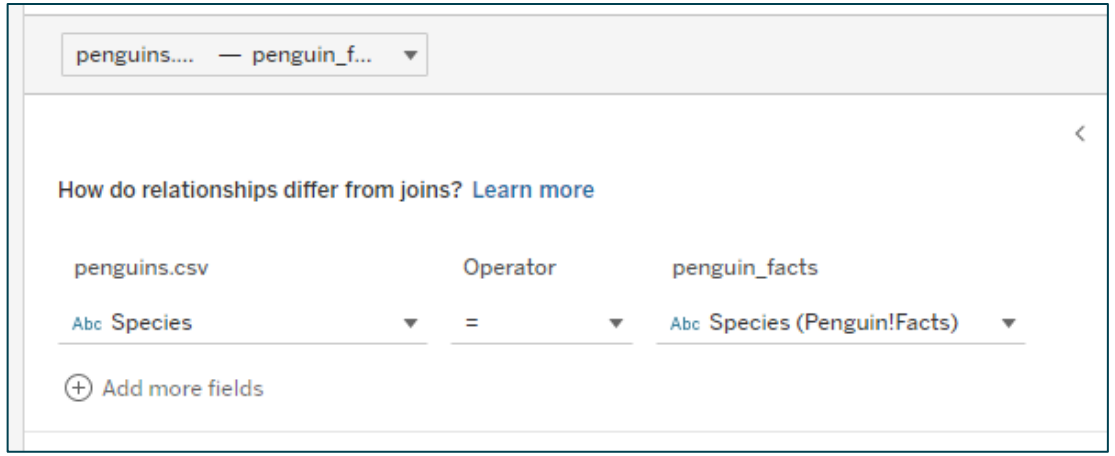
When in the Data Source View it is possible to add more data sources to which the primary source can connect.



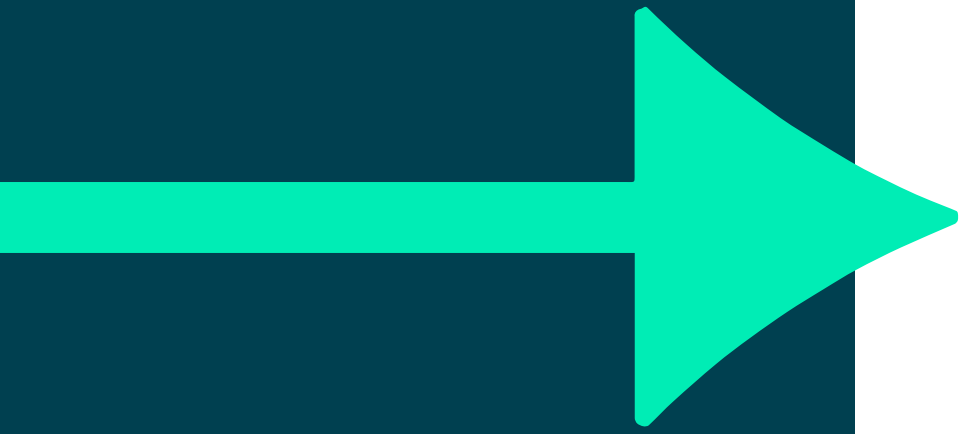
RELATE DATA SOURCES

The relationship fields will be detected automatically if there is a matching name and data type in the secondary source. If not you can use the relationships editor below to configure the fields in common.





WAYS OF WORKING



We will practise a number of exercises this week in Tableau.

→ Create one tableau workbook .twbx file for all the exercises, name the tabs clearly per activity - and remember to keep hitting Save!