USER GUIDE

Connect Data in Tableau Desktop

Document Control Version

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1. Connect Data in Tableau Desktop

Tableau remains the leading reporting tool in the current market. Tableau enables the end users with numerous capabilities in data visualization such as charts, maps, dashboards, tabular reports, and matrix reports. Tableau Desktop consists of simple drag and drop functionality to clean, analyze, and visualize any data.

This guide provides a detailed overview on the features in Tableau for importing data from various sources and the procedural steps to connect with various types of data sources.

Related Information:

- To know about the prerequisites prior to connect data in Tableau Desktop, refer **Section 2. Prerequisites.**
- To explore connectivity features in Tableau for importing data, refer **Section 3. Data Connectivity Features in Tableau Desktop**
- To connect to a file, refer **Section 4. Connect to a File**
- To connect to a database server, refer **Section 5. Connect to a Database Server**
- To connect to a website, refer **Section 6. Connect to a Website**

2. Prerequisites

Following are the requirements needed before connecting data in Tableau.

- Download and install **Tableau Desktop Software**
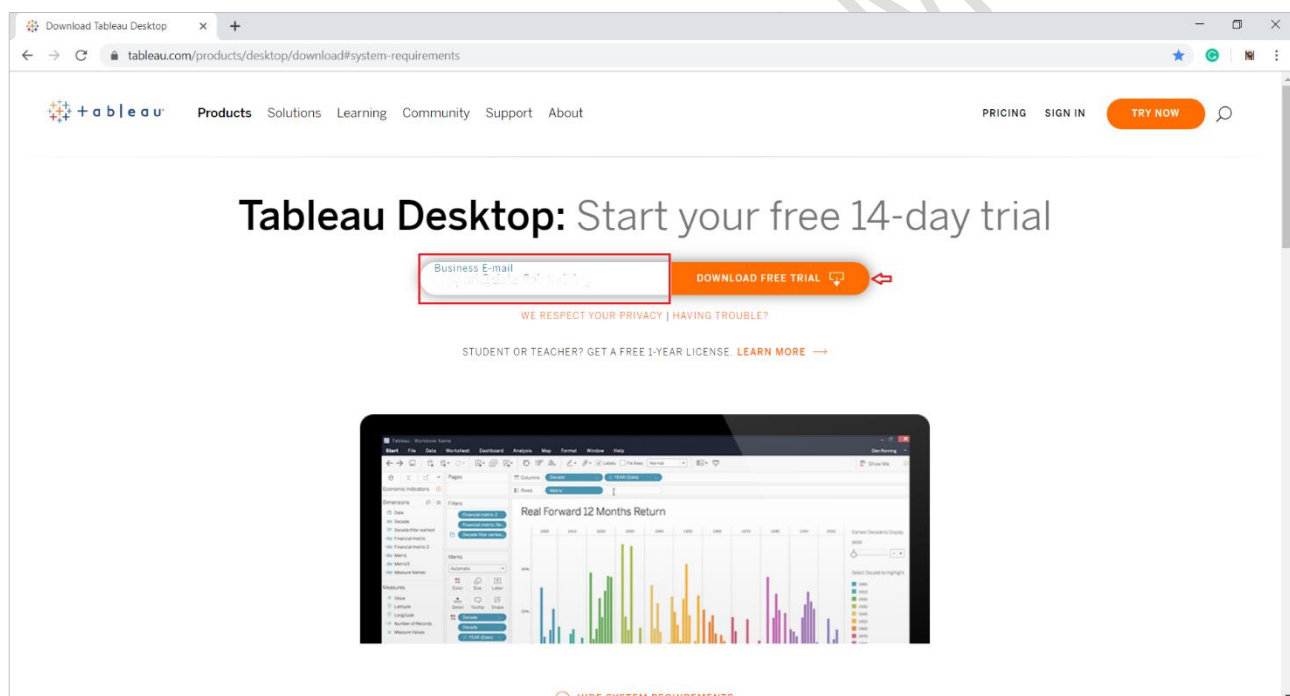- Getting started with **Tableau Start Page**

2.1 Download and Install Tableau Desktop

Tableau Desktop Software can be downloaded from its official website. It allows usage for a trial period of 14 days.

1. To download the Tableau Desktop Software, click the following link.
https://www.tableau.com/products/desktop/download

2. Enter **Business Email** address and click **DOWNLOAD FREE TRIAL.** An installation (**.exe**) file starts downloading automatically.
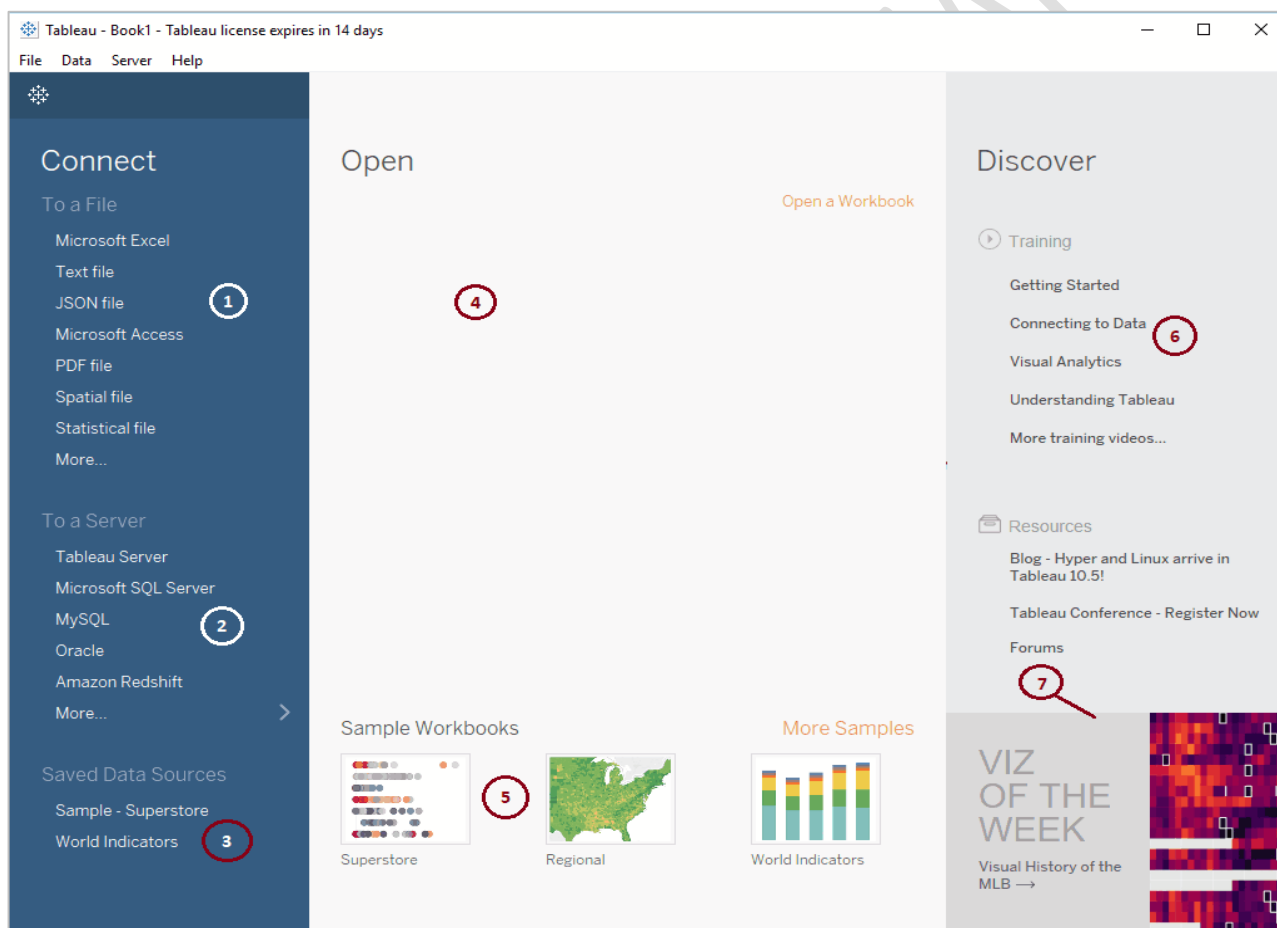

3. Open the installation (**.exe**) file after the download gets completed.
4. Click **Run** to start the installation process.
5. Select the check box for accepting license terms, agreements, and click **Install.**
6. After installation, choose either **Start Trial Now** (for evaluation) or **Activate** (if activation key is available).

Tableau Desktop automatically opens after completing the installation.

2.2 Getting Started with Tableau Desktop

To get started with Tableau Desktop, following are the list of sections to explore in Tableau Start Page.

S. No	UI Feature	Feature Description
1.	Connect to a File	Connects data from Files
2.	Connect to a Server	Connects data from Server
3.	Connect to Saved Data Sources	Enables to access saved data sources
4.	Open a Workbook	Opens recently created or connected workbooks
5.	Sample Workbooks	Opens sample workbooks in Tableau
6.	Training	Enables to access training modules and resources
7.	Resources	Enables to access other resources associated with the product such as Blogs and Community Forums.

Related Information:

- To explore connectivity features in Tableau for importing data, refer **Section 3. Data Connectivity Features in Tableau Desktop**

3. Data Connectivity Features in Tableau Desktop

Tableau supports connectivity to numerous types of data sources including both offline files and online server. Tableau can connect data from offline files such as text file, Excel file, PDF file, JSON file, Access file, and much more. Tableau can connect to various databases with ODBC connectors. Tableau enables connectivity with several servers and web connectors.

- **Connect to a File** - This feature enables connecting data with Files and allows to extract data from files such as Text Files, Excel Files, PDF Files, JSON Files, Spatial Files, and so on.
- **Connect to a Server** - This feature enables to extract data from servers such as MySQL, SQL Server, Tableau Servers, and much more.
- **Connect to Saved Data Sources** - This feature enables to access saved data sources.

DATA CONNECTIVITY IN TABLEAU DESKTOP		
Connect to a File	Connect to a Server	Connect to Saved Data Sources
•Text Files •Excel Files •PDF Files •JSON Files •Spatial Files	•MySQL •Oracle •Tableau Server •Amazon Red Shift	•Sample - Superstore •World Indicator

Related Information:

- To know about the prerequisites prior to connect data in Tableau Desktop, refer **Section 2. Prerequisites.**
- To connect to a file, refer **Section 4. Connect to a File**
- To connect to a database server, refer **Section 5. Connect to a Database Server**
- To connect to a website, refer **Section 6. Connect to a Website**
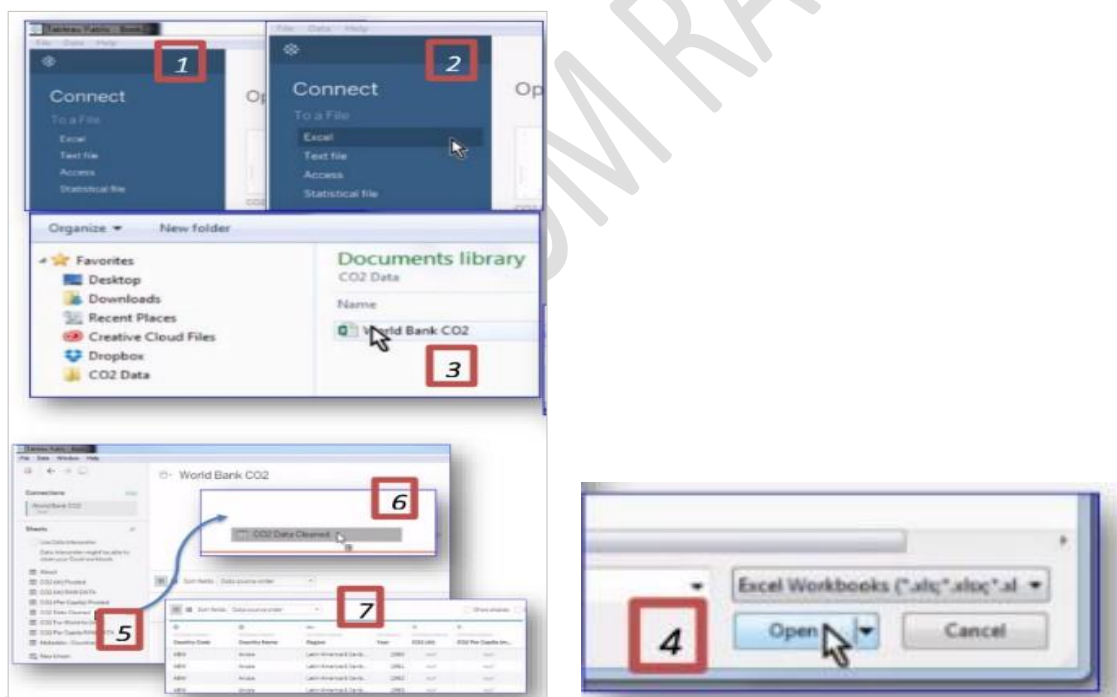
4. Connect to a File

To connect data to a file in Tableau, follow the below steps:

1. To open **Tableau Desktop**, click **Tableau** shortcut in the **Desktop/Start** menu and open the Tableau Interface. Tableau Desktop Welcome page opens. In the left, find a range of **Data Source** options to connect.

Note:
Prerequisites: Installed Tableau Desktop Latest Version. Refer **2. Prerequisites**.

2. To connect data to a file, select a file type (For instance, **Excel** File is selected) in the left panel listed under the **To a File** option.
3. Select a file from the source (For instance, Excel File is selected from the File Explorer).
4. Click **Open**.
5. Select the data from the Data Source page.
6. Drag the sheet into the Data pane.
7. Check the data for any errors and process them if required.

All types of the data from the files such as Text, JSON, PDF, Statistical Files, and Spatial Files can be imported similarly.

Related Information:

- To connect to a database server, refer **Section 5. Connect to a Database Server**
- To connect to a website, refer **Section 6. Connect to a Website**

5. Connect to a Database Server

To connect Data to a Database Server in Tableau, follow the below steps:

1. Open the Tableau Desktop. Refer Step **1** of the Section **4. Connect to a File.**
2. To connect data to a database server, select a server type (For instance, **MySQL** is selected) in the left panel listed under the **To a Server** option.

MySQL Connection Window is displayed.

3. Enter the **Server** name for MySQL DB connection and edit the **Port,** if required.
4. Enter the **Username** and **Password.**
5. Click **Sign In**. MySQL DB is connected to the Tableau Desktop.

6. After connecting the database, select the tables from the database and import data into Tableau Desktop.

Follow the above steps to connect to any Database such as **Oracle, SQL Server** for importing tables like that of **MySQL** in Tableau Desktop.
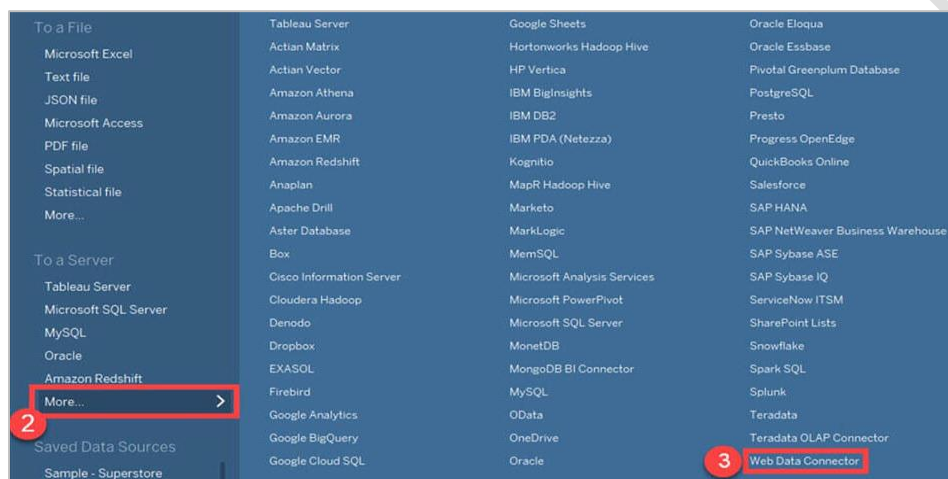
Related Information:

- To connect to a file, refer **Section 4. Connect to a File**
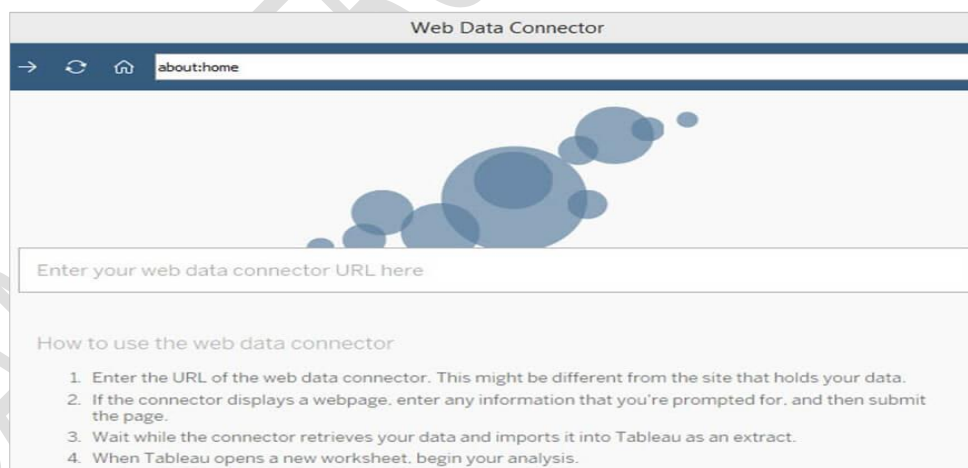- To connect to a website, refer **Section 6. Connect to a Website**

6. Connect to a Website

Tableau Desktop enables to connect to a website using Web Data Connector. Following are the steps to connect to a Website.

1. Open the Tableau Desktop. Refer Step **1** of the Section **4. Connect to a File.**
2. To connect data to a website, select **More** in the left panel listed under the **To a Server** option. Various types of servers are listed.
3. Click **Web Data Connector** from the list.

4. Enter the web connector details in the **Web Data Connector** window.
5. Enter the **URL** of the web data connector.
6. After retrieving data, import data into Tableau as an extract and open extracted data in new worksheet.

Related Information:

- To connect to a file, refer **Section 4. Connect to a File**
- To connect to a database server, refer **Section 5. Connect to a Database Server**