

Getting Started with Tableau Desktop

Welcome to Tableau Desktop 7.0. In this guide you can follow along using sample data to learn how to connect to data and build views.

1. Connect to Data

2. Create Your First View

3. Learn More About Tableau

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Connect to Data

The first thing to do when you start Tableau is connect to a data source. Follow the steps below to connect to a sample Excel workbook that comes with Tableau.

😳 Tableau - Book1			,
File Data Server Help		🔅 Tableau - Book1	
	1	File Data Server Help	
Data	Workbooks	Connect to Data	
Connect to data Saved data sources Sample - Coffee Chain (Access) Sample - Superstore Sales (Excel)		In a file Tableau Data Extract Hicrosoft Access Text file Import from Workbook On a server Stableau Server Aster Data nCluster	Saved data sources Sample - Coffee Chain (Access) Sample - Superstore Sales (Excerning)
		Cloudera Hadoop Hive Firebird Greenplum IBM DB2 InterSystems Caché Microsoft Analysis Services Microsoft SQL Server	

3

Open the the data file.

Navigate to the the **Sample-Superstore Sales** workbook located in the Datasources folder in your Tableau Repository. Then click **Open**.

🐼 Open			×
😋 🔾 🗢 📕 « My Table	au Repository 🕨 Datasources 🔹 👻 🐓	Search Datasources	Q
Organize 🔻 New folde	er	8== 👻	
🔆 Favorites	Documents library Datasources	Arrange by:	Folder 🔻
Cibraries	Name	Туре	
Documents Music	🕙 Sample - Superstore Sales (Excel).xls	Microsoft Office E	
 Pictures Videos 			
🖳 Computer			
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File na	ame: Sample - Superstore Sales (Excel).xls 🔻	Excel Workbooks (*.xls, Open	*.xlsx, *: ▼ Cancel

Your Tableau Repository is located in your My Documents folder.



Set up the connection.

Select the **Orders** worksheet and click **OK**.

Excel Workbook Conr	nection		×			
Step 1: Select an Exc	el workbook:					
C:\Users\eeaster	C:\Users\eeaster\Documents\My Tableau Repository\Data Browse					
Step 2: Select the wo	rksheet (table) to analy	/ze:				
Single Table	Multiple Tables	Custom SQL				
Step 3: Does the data	a include field names in w has field names in it.	the first row?				
No, automatica	lly generate names for	the fields.				
Step 4: Give the conn	ection a name for use i	n Tableau:				
Orders (Sample -	Superstore Sales (Exce	l).xls)				
		ОК	Cancel			

Note: If you are having problems connecting to an Excel workbook of your own, make sure each worksheet is organized into rows and columns properly. To see an example of how to set up your Excel data, open the sample file that comes with Tableau. You can find it in your documents folder located at: My Tableau Repository\Datasources\ Sample - Superstore Sales (Excel).xls.



Create Your First View

After you connect to a data source, fields are displayed on the left side of the workbook as Dimensions and Measures. Create views by dragging and dropping fields onto shelves.



Drag a dimension to the Columns shelf. Click and drag the Category field and drop it on the Columns shelf. Tableau - Book2

File Edit View Format Data	Analysis Table Bookmark Server Window Help
🔄 🔶 🖬 📢 📅 🧬	📷 • 📴 • 🖉 • 🔳 Show Mel 🏢 🔛 🖳 Abc 🖵 📴 • Normal
Data •	Pages Calumna Category
🗍 Sample - Superstore Sales (Ex	Columns Collegery
Dimensions 🔎 👻	Rows
Abo Container Abo Customer Name	Filters Drop field here
Customer State # Last N days	Marks Drop
Order Date Order ID Order Priority	Automatic field Drop field here
E & Products	
Abo Category	
Abo Product Name	
Abo Region	Level of Detail
Measures	
# Discount	
# Order Quantity	



5

Drag a measure to the Text Shelf.

Click and drag the Sales measure and drop it on the Text shelf.

Meas	ures					
# D	iscount	Marks				
# 0	rder Quantity	Automatic				
# P	roduct Base Margin		CLID WCalan			
# P	rofit	Text - 34	Text - Sum(sales)			
=# P	rofit Ratio	Color - (
# Si	ales	Size				
# SI	# Shipping Cost					
=# T	ime to Ship					
U # U	# Unit Price		Detail			
⊗ L ⊗ L =# N		F	Product Category			
# 1	Region	Furniture	Office Supplies	Technology		
	Central	1,321,948	935,971	1,435,362		
	East	1,130,830	776,050	1,276,109		
	South	1,354,835	990,105	1,787,040		
	West	1.311.641	1.098.101	1,489,060		

Visualize your data.

Drag the Sales measure from the Text shelf and drop it on the Columns shelf.





Drag a dimension to the Rows shelf.

Click and drag the **Region** field and drop it on the Rows shelf.



4

Drag another dimension to the Rows shelf. Click and drag the Customer Segment field and drop it on the Rows shelf.

	D	mns	Category			
You now have a text		s	Region	Customer Segment		nent
summary commonly		/			Category	
called	a cross-tab.	iion	Customer Segment	Furniture	Office Supplies	Technology
		itral	Consumer	\$289,282	\$250,792	\$246,839
	Marks		Corporate	\$446,375	\$342,052	\$664,840
	Automatic -		Home Office	\$308,422	\$182,216	\$252,187
	Test Clink(C L)		Small Business	\$277,869	\$160,911	\$271,497
	Text + SUM(Sales)	East	Consumer	\$259,417	\$112,651	\$263,198
	Color•		Corporate	\$427,327	\$276,199	\$480,040
	Size		Home Office	\$296,638	\$208,127	\$315,792
	_ <u>∩</u>		Small Business	\$147,449	\$179,072	\$217,079
	Level of Detail	South	Consumer	\$224,772	\$151,003	\$341,205
			Corporate	\$490,954	\$349,322	\$682,494
			Home Office	\$332,300	\$232,103	\$377,430
			Small Business	\$306,809	\$257,677	\$385,912
		West	Consumer	\$338,330	\$193,943	\$392,180
			Corporate	\$473,540	\$397,185	\$470,699
			Home Office	\$343,460	\$342,133	\$373,955

6

Use color to show more information.

Drag the Region dimension from the Data window and drop it on the Color shelf.



You can now quickly pick out the best and worst products, regions, and markets.



Learn More About Tableau



Tune in to learn more!

Register Now!

visit http://www.tableausoftware.com/learn/training

Check out these additional resources on the Help menu:

Help > Sample Workbooks

The sample workbooks contain samples that highlight some of the amazing things you can do with Tableau.

Help > Community Center

Find additional resources online in the Community Center. Get help, browse the discussion boards, and see what others are doing with Tableau.

Help > Help Topics

View the online help for complete discussions of the features and functions.