



TABLEAU

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About the Tutorial

Tableau is a Business Intelligence tool for visually analyzing the data. Users can create and distribute an interactive and shareable dashboard, which depict the trends, variations, and density of the data in the form of graphs and charts.

Tableau can connect to files, relational and Big Data sources to acquire and process data. The software allows data blending and real-time collaboration, which makes it very unique. It is used by businesses, academic researchers, and many government organizations for visual data analysis. It is also positioned as a leader Business Intelligence and Analytics Platform in Gartner Magic Quadrant.

Audience

This tutorial is designed for all those readers who want to create, read, write, and modify Business Intelligence Reports using Tableau. In addition, it will also be quite useful for those readers who would like to become a Data Analyst or a Data Scientist.

Prerequisites

Before proceeding with this tutorial, you should have a basic understanding of Computer Programming terminologies and Data analysis. You should also have some knowledge on various types of graphs and charts. Familiarity with SQL will be an added advantage.

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Table of Contents

About the Tutorial	i
Audience.....	i
Prerequisites.....	i
Disclaimer & Copyright.....	i
Table of Contents	ii
TABLEAU – BASICS	1
1. Tableau – Overview	2
Tableau Features.....	2
2. Tableau – Environment Setup	3
3. Tableau – Get Started	7
Connect to a Data Source.....	7
4. Tableau – Navigation	10
Menu Commands	10
File Menu.....	11
Data Menu.....	12
Worksheet Menu.....	13
Dashboard Menu.....	13
Story Menu	14
Analysis Menu	15
Map Menu	16
Format Menu.....	17
Server Menu.....	18
5. Tableau – Design Flow	20
6. Tableau – File Types	22
7. Tableau – Data Types	24
8. Tableau – Show Me.....	25
Show Me with Two Fields.....	26
Show Me with Multiple Fields	27
9. Tableau – Data Terminology	28
TABLEAU – DATA SOURCES	30
10. Tableau – Data Sources	31
11. Tableau – Custom Data View	33
Drill Down View	33
Swapping Dimensions.....	34

12. Tableau – Extracting Data	36
Creating an Extract	36
Applying Extract Filters	37
Adding New Data to Extract	38
Extract History	39
13. Tableau – Fields Operations	40
Adding Fields to Worksheet	40
Combining Two Fields.....	41
Searching Fields	41
Reordering Fields.....	42
14. Tableau – Editing Metadata	44
Checking the Metadata	44
Changing the Data Type	45
Renaming and Hiding	46
Column Alias.....	47
15. Tableau – Data Joining	48
Creating a Join	48
Editing a Join Type	49
Editing Join Fields	50
16. Tableau – Data Blending	51
Preparing Data for Blending	51
Adding Secondary Data Source	52
Blending the Data	53
TABLEAU - WORKSHEETS	54
17. Tableau – Add Worksheets	55
18. Tableau – Rename Worksheet	57
Renaming the Worksheet.....	57
19. Tableau – Save & Delete Worksheet	59
20. Tableau – Reorder Worksheet	61
21. Tableau – Paged Workbook	63
TABLEAU – CALCULATIONS	66
22. Tableau – Operators	67
Types of Operator.....	67
23. Tableau – Functions	71
24. Tableau – Numeric Calculations	74
25. Tableau – String Calculations	80

26. Tableau – Date Calculations	83
27. Tableau – Table Calculations	86
28. Tableau – LOD Expressions	87
TABLEAU – SORT & FILTERS	92
29. Tableau – Basic Sorting	93
Computed Sorting	93
Manual Sorting	93
30. Tableau – Basic Filters	94
Filter Dimensions	94
Filter Measures	96
Filter Dates	99
31. Tableau – Quick Filters	103
Clearing the Filter	105
32. Tableau – Context Filters	107
Creating Context Filter	107
33. Tableau – Condition Filters	112
Creating a Condition Filter	112
34. Tableau – Top Filters	115
Creating a Top Filter	115
35. Tableau – Filter Operations	118
Creating Filters	118
Clearing Filters	121
TABLEAU – CHARTS	122
36. Tableau – Bar Chart	123
Simple Bar Chart	123
Bar Chart with Color Range	124
Stacked Bar Chart	125
37. Tableau – Line Chart	126
Simple Line Chart	126
Multiple Measure Line Chart	127
Line Chart with Label	128
38. Tableau – Pie Chart	129
Simple Pie Chart	129
Drill-Down Pie Chart	130

39. Tableau – Crosstab	132
Simple Crosstab	132
Crosstab - Color Encoded	133
Crosstab with Row Percentage.....	133
40. Tableau – Scatter Plot	136
Simple Scatter Plot	136
Scatter Plot - Color Encoded.....	137
Drill-Down Scatter Plot	138
41. Tableau - Bubble Chart	140
Simple Bubble Chart	140
Bubble Chart with Measure Values	141
Bubble Chart with Measure Colors.....	141
42. Tableau – Bullet Graph	143
Creating Bubble Chart	143
43. Tableau – Box Plot	145
Creating a Box Plot	145
44. Tableau – Tree Map	147
Creating a Tree Map	147
45. Tableau – Bump Chart	149
Creating a Bump Chart	149
46. Tableau – Gantt Chart	153
Creating a Gantt Chart.....	153
47. Tableau – Histogram	157
Creating a Histogram	157
48. Tableau – Motion Charts	159
Creating a Motion Chart	159
49. Tableau - Waterfall Charts	162
Creating a Waterfall Chart.....	162
TABLEAU – ADVANCED	167
50. Tableau – Dashboard	168
Creating a Dashboard	168
51. Tableau – Formatting	174
Formatting the Axes	175
Change the Font	176
Change the Shade and Alignment	177
Format Borders.....	178

52. Tableau – Forecasting179
 Creating a Forecast..... 179

53. Tableau – Trend Lines183
 Creating a Trend Line..... 183

Tableau – Basics

1. Tableau – Overview

As a leading data visualization tool, Tableau has many desirable and unique features. Its powerful data discovery and exploration application allows you to answer important questions in seconds. You can use Tableau's drag and drop interface to visualize any data, explore different views, and even combine multiple databases easily. It does not require any complex scripting. Anyone who understands the business problems can address it with a visualization of the relevant data. After analysis, sharing with others is as easy as publishing to Tableau Server.

Tableau Features

Tableau provides solutions for all kinds of industries, departments, and data environments. Following are some unique features which enable Tableau to handle diverse scenarios.

- **Speed of Analysis:** As it does not require high level of programming expertise, any user with access to data can start using it to derive value from the data.
- **Self-Reliant:** Tableau does not need a complex software setup. The desktop version which is used by most users is easily installed and contains all the features needed to start and complete data analysis.
- **Visual Discovery:** The user explores and analyzes the data by using visual tools like colors, trend lines, charts, and graphs. There is very little script to be written as nearly everything is done by drag and drop.
- **Blend Diverse Data Sets:** Tableau allows you to blend different relational, semi-structured and raw data sources in real time, without expensive up-front integration costs. The users don't need to know the details of how data is stored.
- **Architecture Agnostic:** Tableau works in all kinds of devices where data flows. Hence, the user need not worry about specific hardware or software requirements to use Tableau.
- **Real-Time Collaboration:** Tableau can filter, sort, and discuss data on the fly and embed a live dashboard in portals like SharePoint site or Salesforce. You can save your view of data and allow colleagues to subscribe to your interactive dashboards so they see the very latest data just by refreshing their web browser.
- **Centralized Data:** Tableau server provides a centralized location to manage all of the organization's published data sources. You can delete, change permissions, add tags, and manage schedules in one convenient location. It's easy to schedule extract refreshes and manage them in the data server. Administrators can centrally define a schedule for extracts on the server for both incremental and full refreshes.

2. Tableau – Environment Setup

In this chapter, you will learn about the environment setup of Tableau.

Download Tableau Desktop

The Free Personal Edition of Tableau Desktop can be downloaded from [Tableau Desktop](#). You need to register with your details to be able to download.

After downloading, the installation is a very straightforward process in which you need to accept the license agreement and provide the target folder for installation. The following steps and screenshots describe the entire setup process.

Start the Installation Wizard

Double-click the **TableauDesktop-64bit-9-2-2.exe**. It will present a screen to allow the installation program to run. Click "Run".



Accept the License Agreement

Read the license agreement and if you agree, choose the "I have read and accept the terms of this license agreement" option. Then, click "Install".



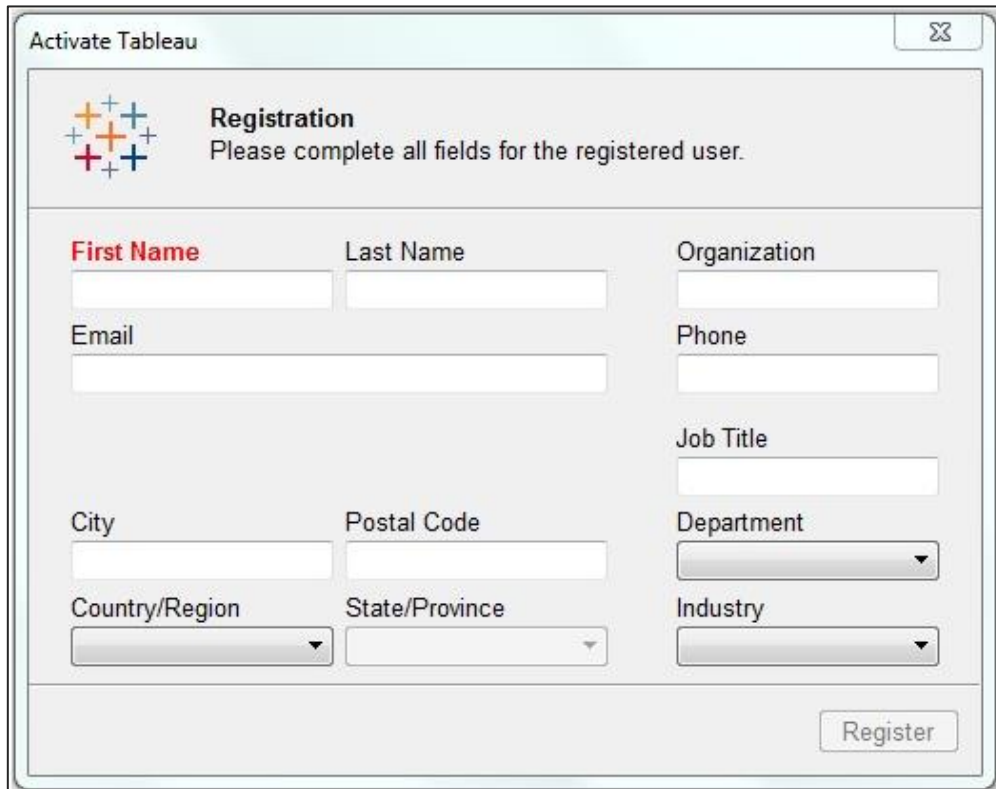
Start Trial

On completion of the installation, the screen prompts you with the option to Start the trial now or later. You may choose to start it now. Also, if you have purchased Tableau then you may enter the License key.



Provide Your Details

Provide your name and organization details. Then, click "Next".



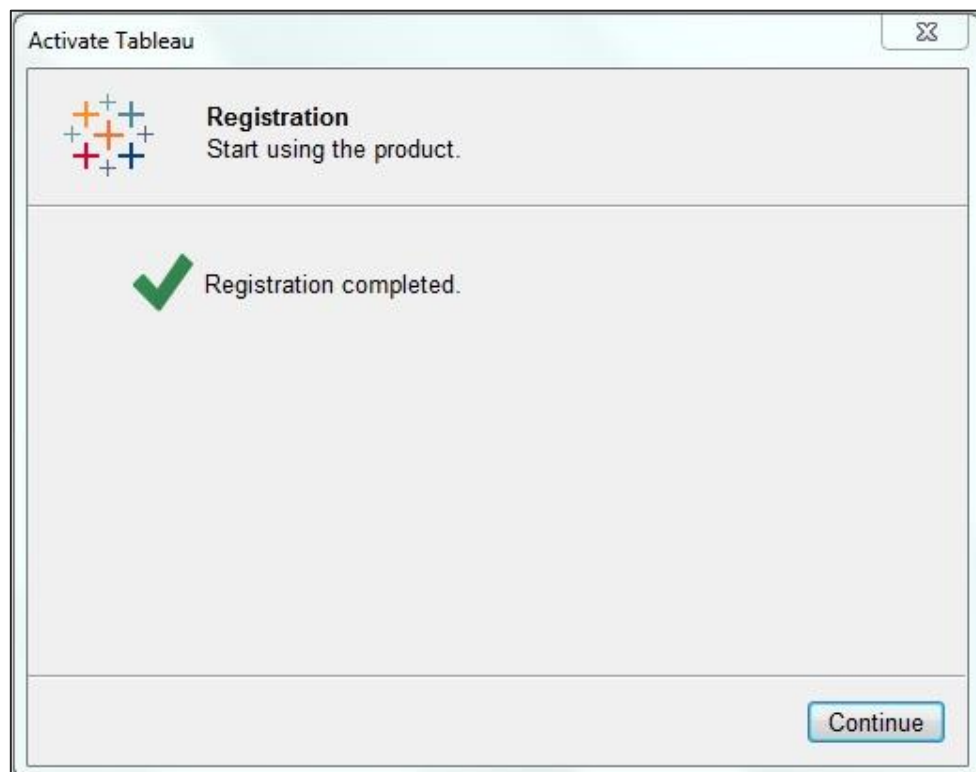
The screenshot shows a window titled "Activate Tableau" with a registration form. The form includes the following fields:

- First Name** (text input)
- Last Name** (text input)
- Organization** (text input)
- Email** (text input)
- Phone** (text input)
- Job Title** (text input)
- City** (text input)
- Postal Code** (text input)
- Department** (dropdown menu)
- Country/Region** (dropdown menu)
- State/Province** (dropdown menu)
- Industry** (dropdown menu)

A "Register" button is located at the bottom right of the form.

Registration Complete

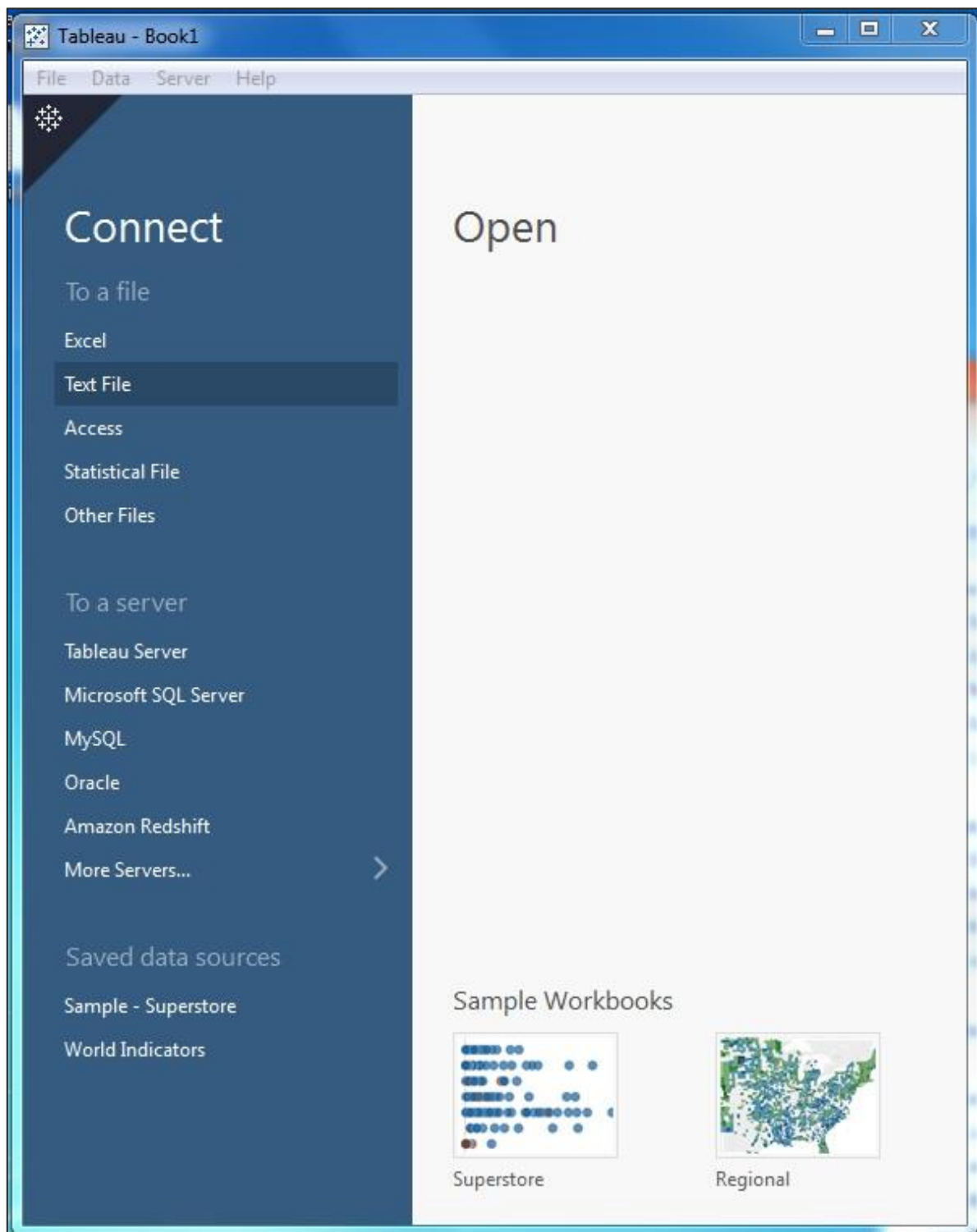
The registration completion screen appears. Click "Continue".



The screenshot shows a window titled "Activate Tableau" with a registration completion screen. The screen displays a green checkmark and the text "Registration completed." A "Continue" button is located at the bottom right of the screen.

Verify the Installation

You can verify the installation by going to the Windows start menu. Click the Tableau icon. The following screen appears.



You are now ready to learn Tableau.

3. Tableau – Get Started

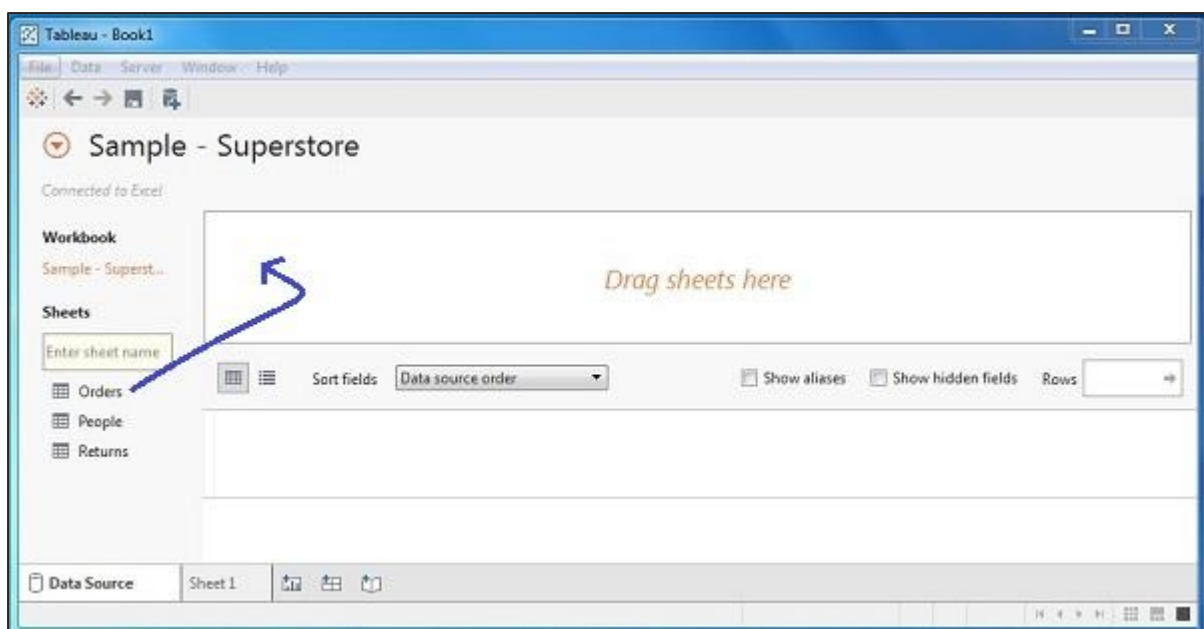
In this chapter, you will learn some basic operations in Tableau to get acquainted with its interface. There are three basic steps involved in creating any Tableau data analysis report. These three steps are:

- **Connect to a data source:** It involves locating the data and using an appropriate type of connection to read the data.
- **Choose dimensions and measures:** This involves selecting the required columns from the source data for analysis.
- **Apply visualization technique:** This involves applying required visualization methods, such as a specific chart or graph type to the data being analyzed.

For convenience, let's use the sample data set that comes with Tableau installation named sample – superstore.xls. Locate the installation folder of Tableau and go to **My Tableau Repository**. Under it, you will find the above file at **Datasources\9.2\en_US-US**.

Connect to a Data Source

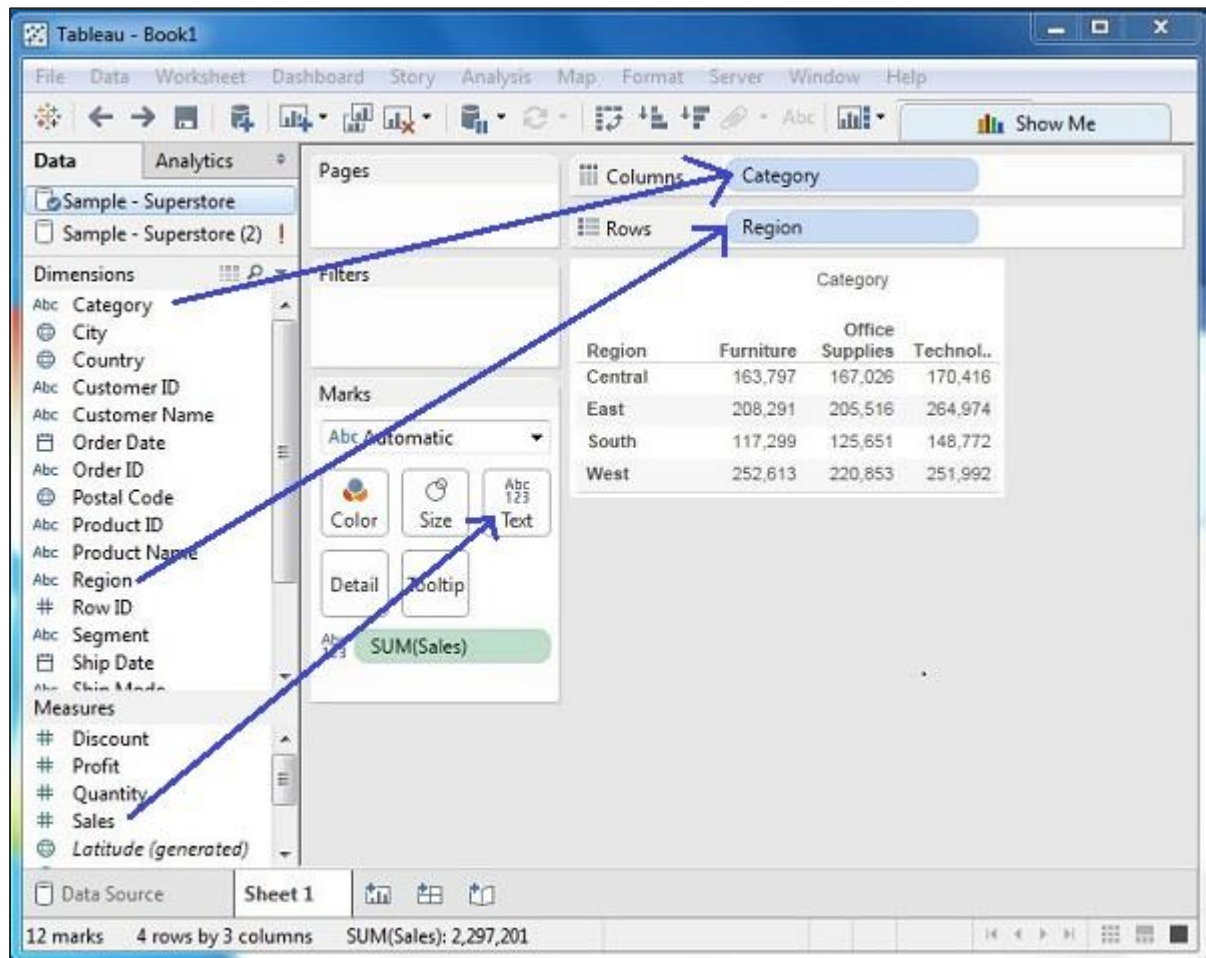
On opening Tableau, you will get the start page showing various data sources. Under the header "**Connect**", you have options to choose a file or server or saved data source. Under Files, choose excel. Then navigate to the file "**Sample – Superstore.xls**" as mentioned above. The excel file has three sheets named Orders, People and Returns. Choose **Orders**.



Choose the Dimensions and Measures

Next, choose the data to be analyzed by deciding on the dimensions and measures. Dimensions are the descriptive data while measures are numeric data. When put together, they help visualize the performance of the dimensional data with respect to the data which

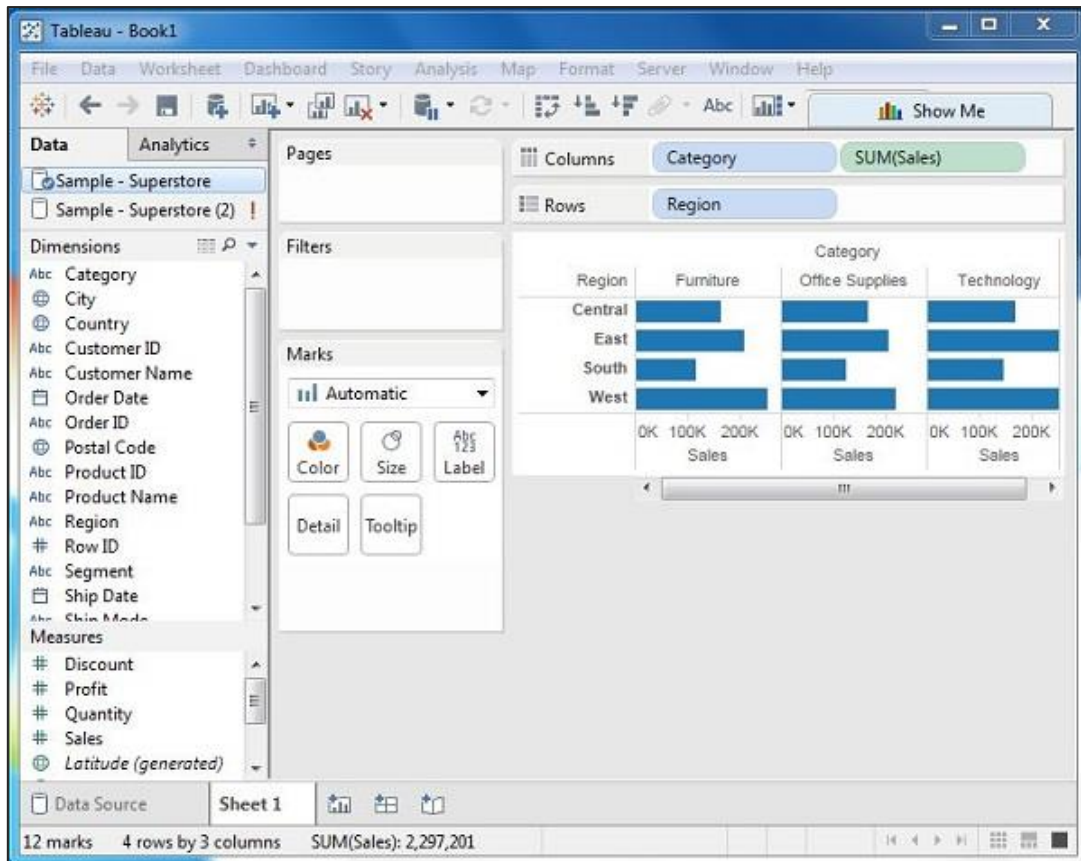
are measures. Choose **Category** and **Region** as the dimensions and **Sales** as the measure. Drag and drop them as shown in the following screenshot. The result shows the total sales in each category for each region.



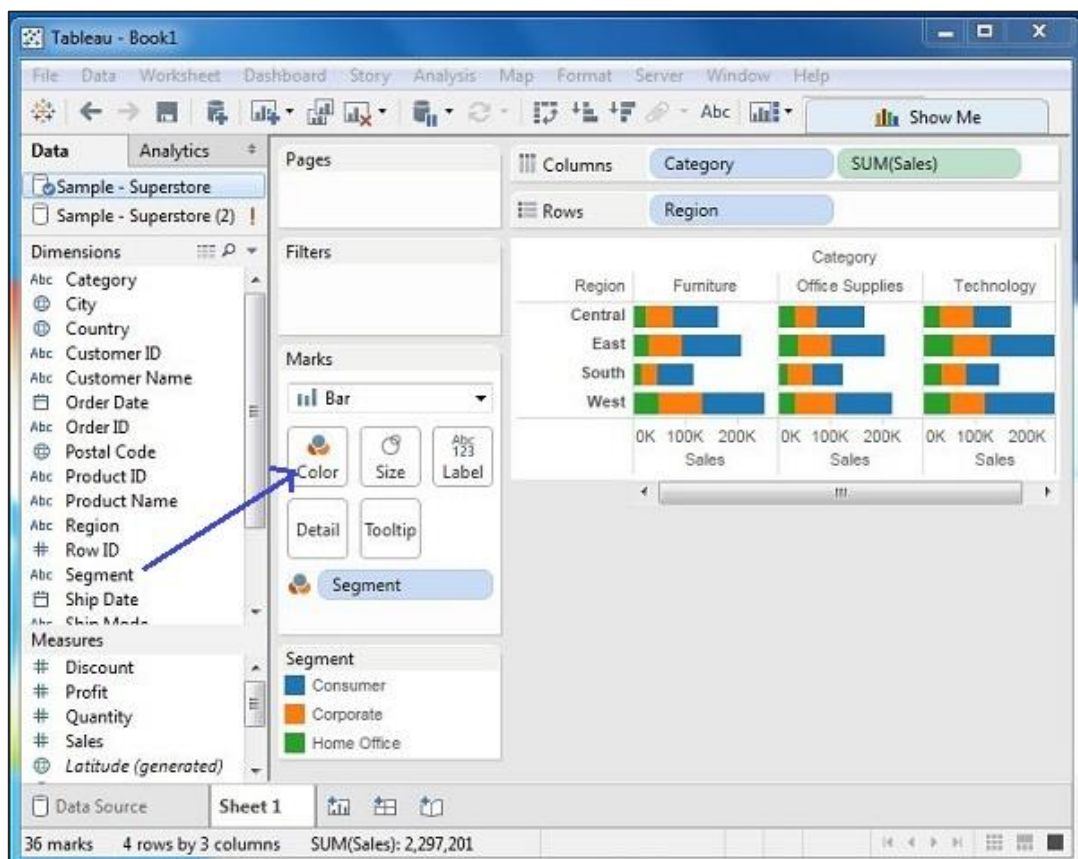
Apply Visualization Technique

In the previous step, you can see that the data is available only as numbers. You have to read and calculate each of the values to judge the performance. However, you can see them as graphs or charts with different colors to make a quicker judgment.

We drag and drop the sum (sales) column from the Marks tab to the Columns shelf. The table showing the numeric values of sales now turns into a bar chart automatically.



You can apply a technique of adding another dimension to the existing data. This will add more colors to the existing bar chart as shown in the following screenshot.



End of ebook preview

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