

Chapter 1: Catching Up with Tableau 2018

Specify your extract schema:

Schema

Single Table Multiple Tables

Tableau will store your extract in a single table.

Specify how much data to extract:

Filters (optional)

| Filter | Details |
|--------|---------|
|--------|---------|

Aggregation

Aggregate data for visible dimensions

Roll up dates to

Number of Rows

All rows

Incremental refresh

Top: rows

Sample:

Orders+ (Multiple-Table-Storage-Test)

Connection: Live Extract | Edit Refresh Filters: 0 | Add
Extract will include all data.

Connections: Add
Multiple-Table-Storage-Test (Microsoft Excel)

Sheets: Orders, User Access, New Union

Orders — User Access

Creating Extract

Importing data
Rows retrieved: 11 082 000

Cancel

| Row ID | Order ID | Customer Name | Segment |
|--------|----------------|-----------------|----------|
| 8 | CA-2015-115812 | Brosina Hoffman | Consumer |
| 8 | CA-2015-115812 | Brosina Hoffman | Consumer |
| 8 | CA-2015-115812 | Brosina Hoffman | Consumer |
| 8 | CA-2015-115812 | Brosina Hoffman | Consumer |
| 8 | CA-2015-115812 | Brosina Hoffman | Consumer |
| 8 | CA-2015-115812 | Brosina Hoffman | Consumer |
| 8 | CA-2015-115812 | Brosina Hoffman | Consumer |
| 8 | CA-2015-115812 | Brosina Hoffman | Consumer |

Join

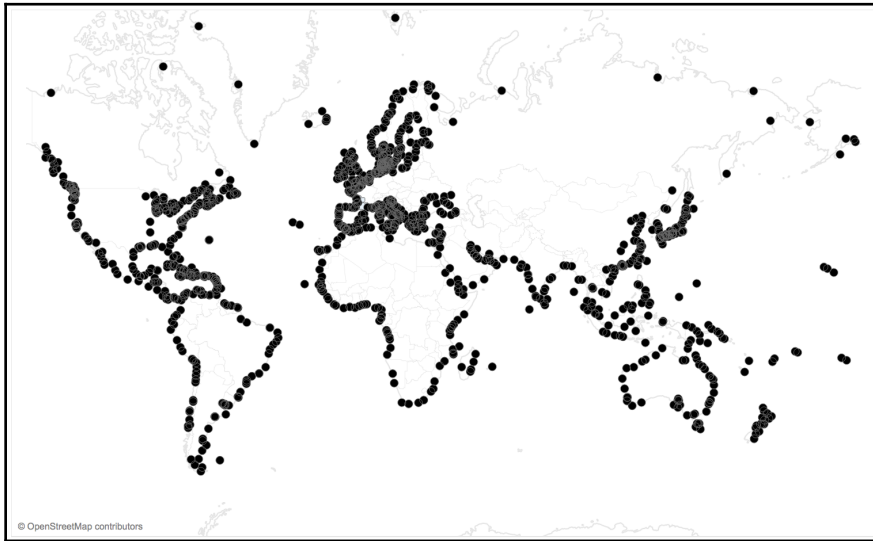
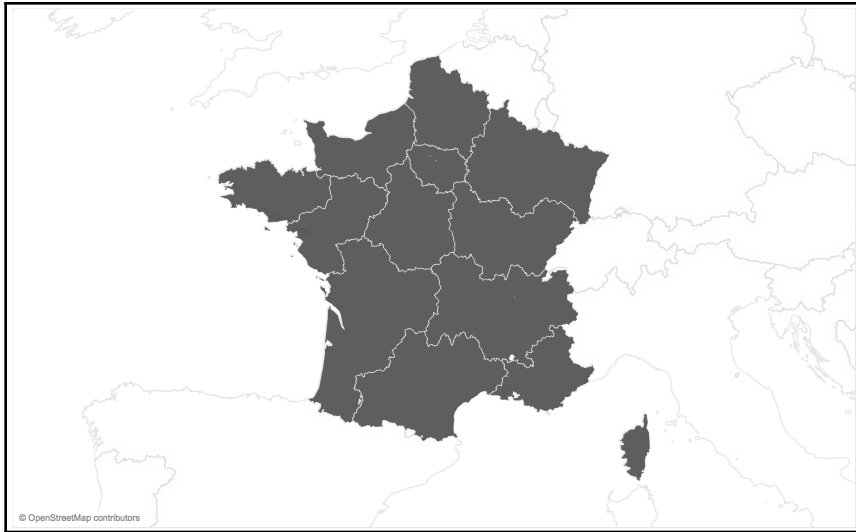
Inner Left Right Full Outer

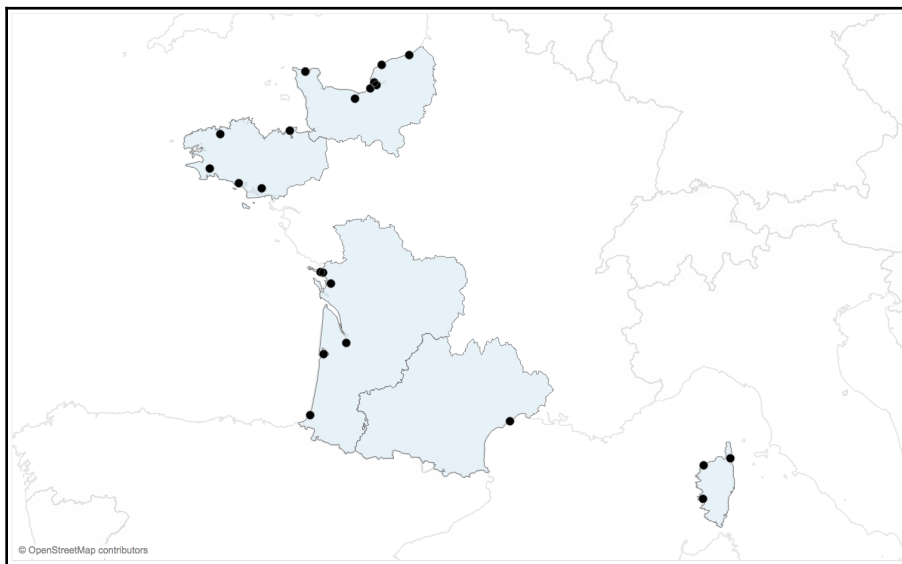
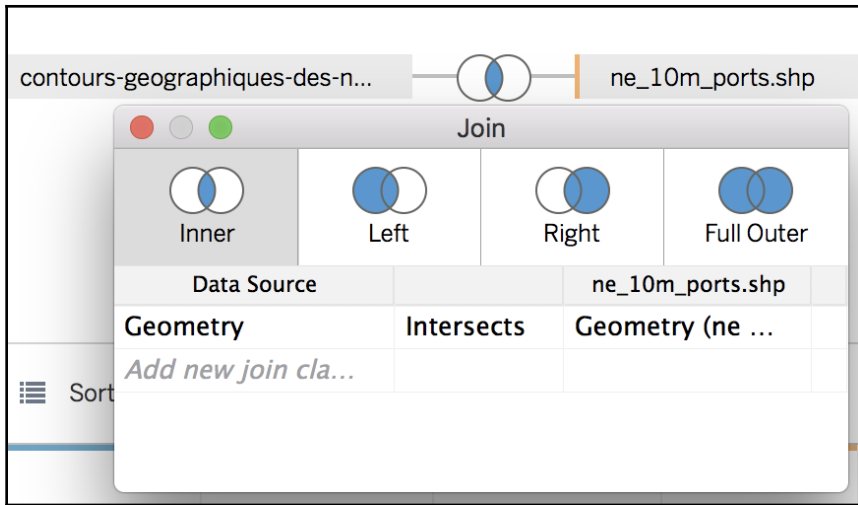
Data Source: Geometry, contours-geograph...

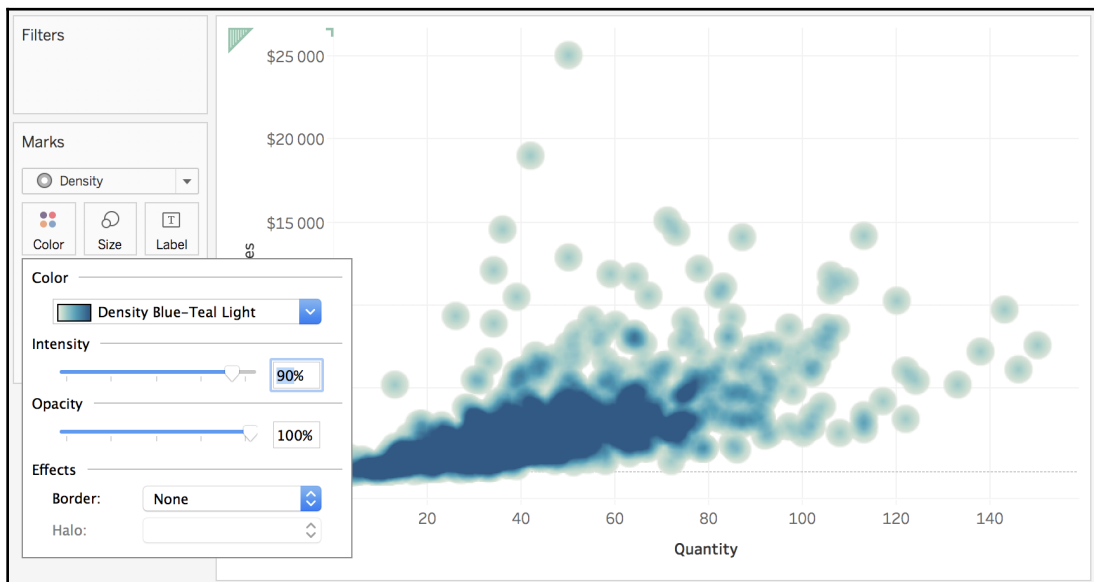
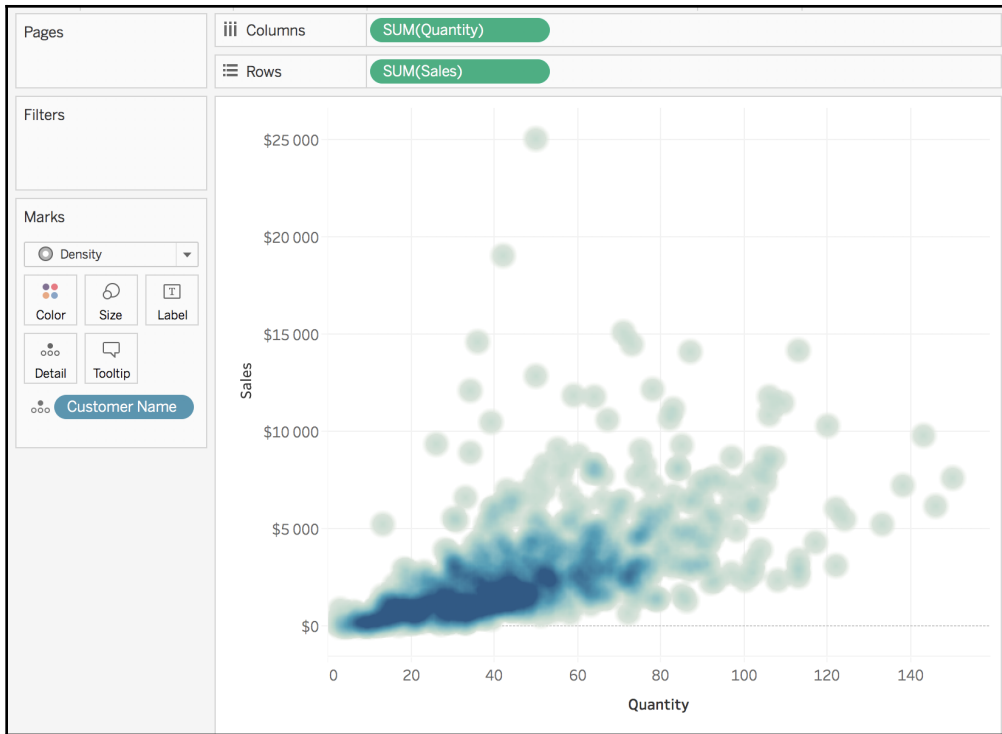
Geometry = Geometry (co... [X]

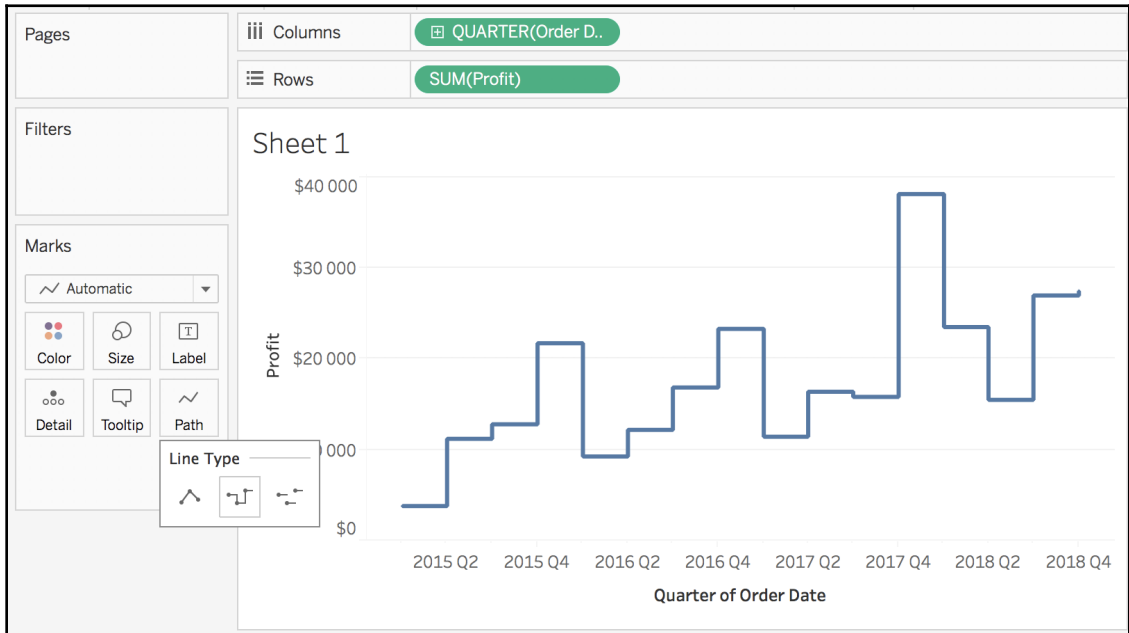
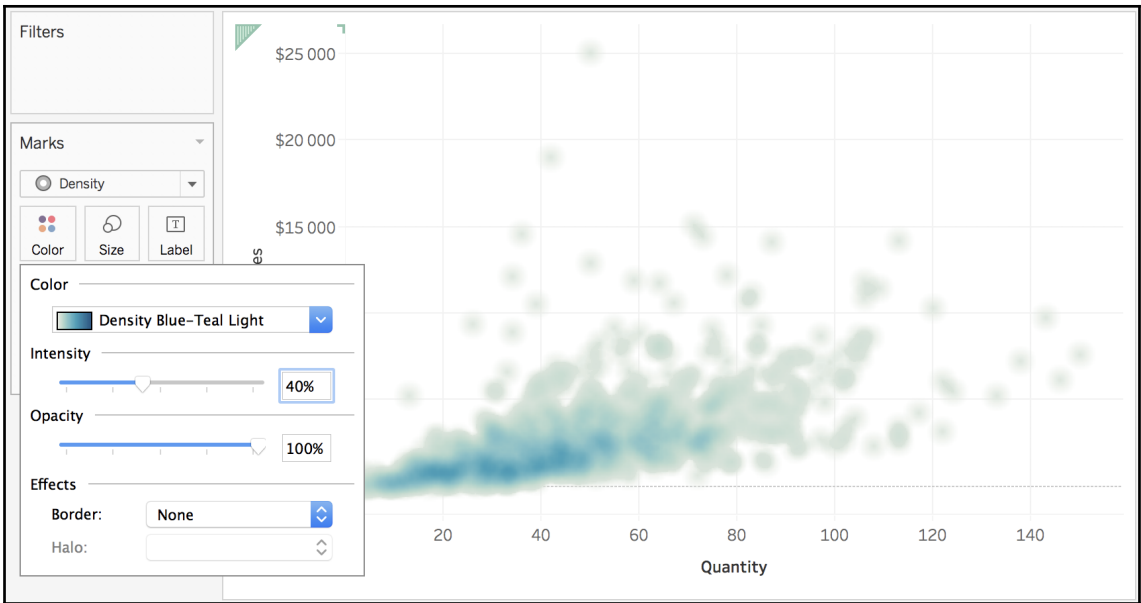
Add new join cla...

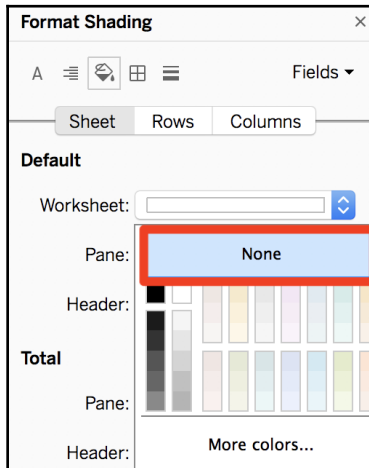
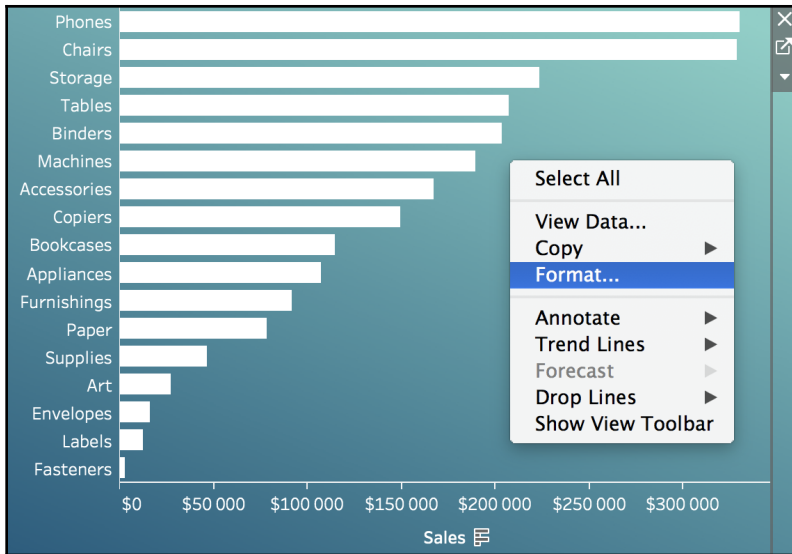
Intersects

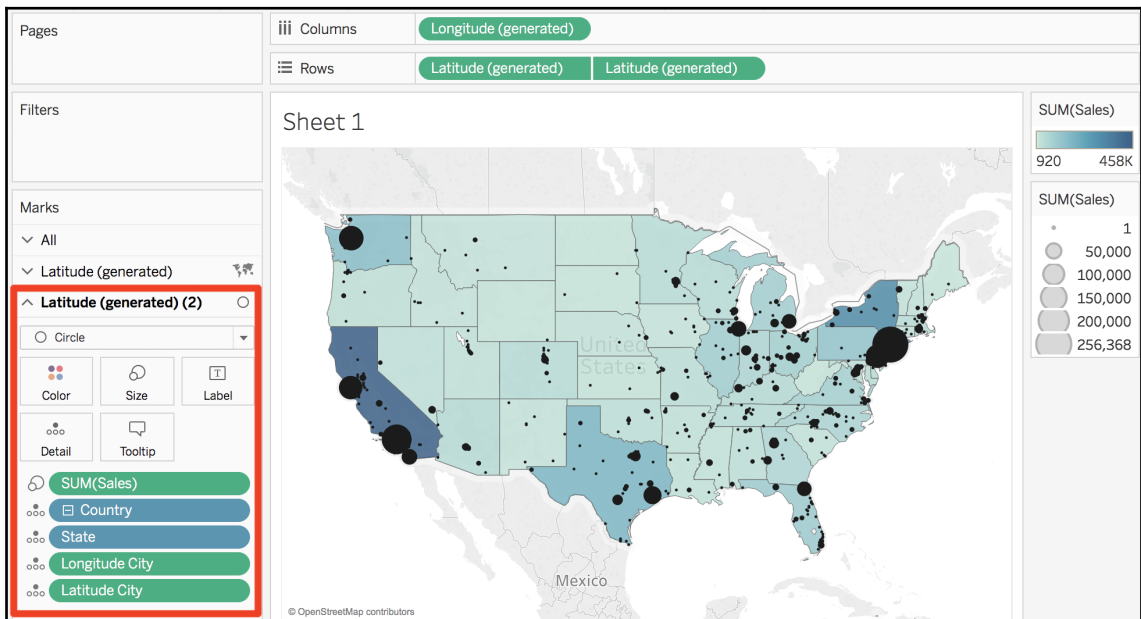
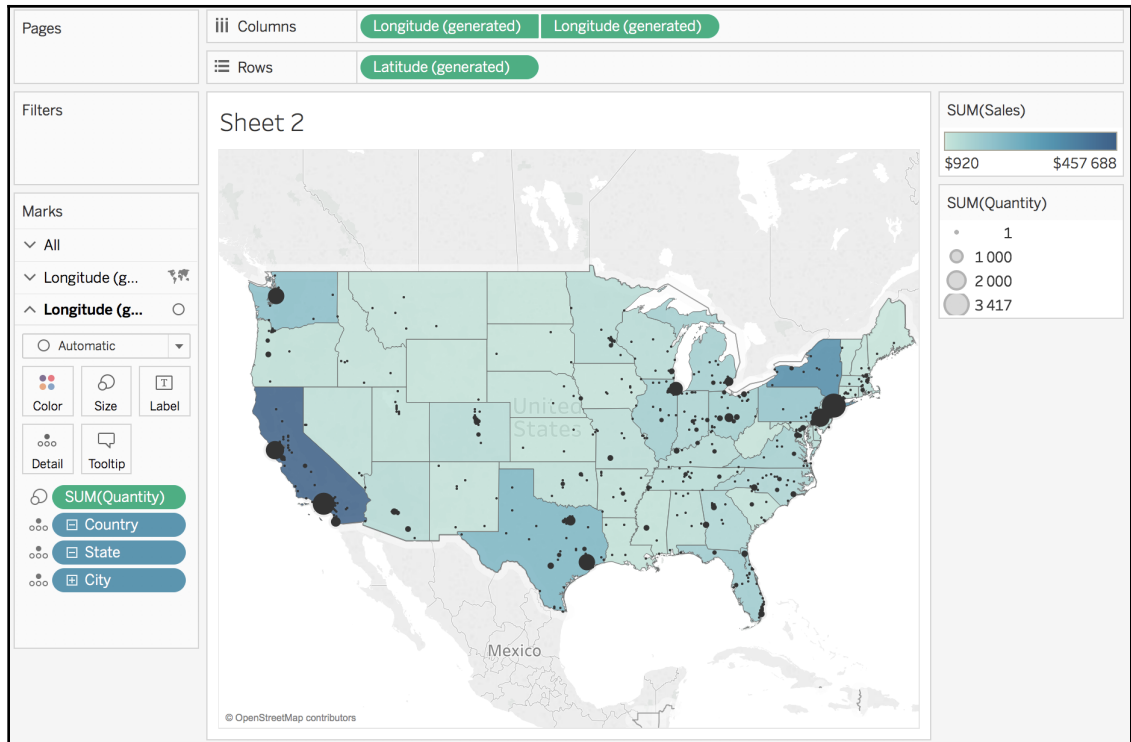


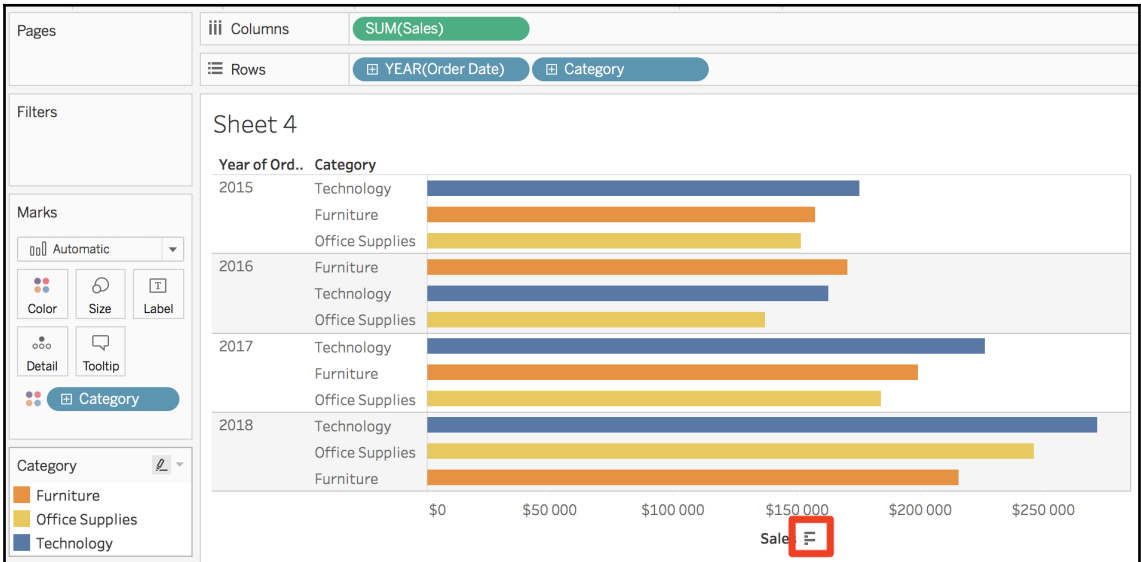
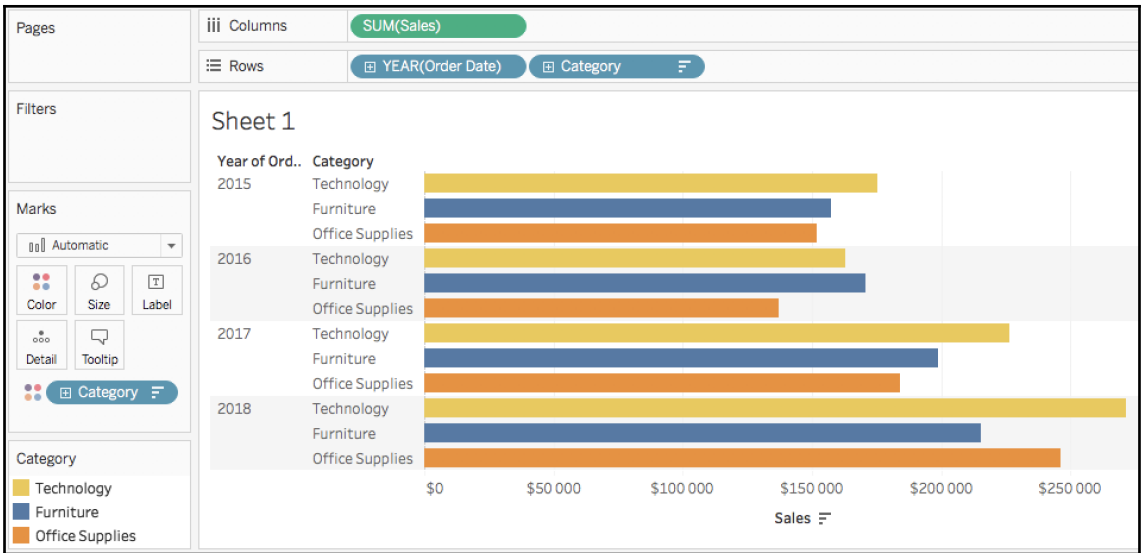






















Objects

| | |
|--|---|
|  Horizontal |  Web Page |
|  Vertical |  Blank |
|  Text |  Button |
|  Image |  Extension |

 | Extension Gallery (Beta) SIGN IN



Data-Driven Parameters
by Tableau

Download

Description

This extension allows you to add a parameter to a Tableau dashboard whose domain is based on your data. Added a new product line? No longer do you need to manually edit the parameter to update it, with this extension your parameter values update automatically! 1. Create an open input (All) parameter with a data type matching the field you want to use to populate it. 2. Drag in this extension. 3. Select the parameter you created above for the extension to manipulate. 4. Select the worksheet that holds the field you want to base your parameter on. 5. Select the field you want to base your parameter on. 6. Click 'OK'.
Optional: Configure your text and background colors. Note: You can add as many instances of this extension as you like!

Tech Specifications

Policy: [Privacy Policy](#)
 Usage: [Terms of Service](#)
 Support: [Developer Website](#)
 Version: 1.0.0

Data-Driven Parameter Configuration ⓘ

Configure Parameter

Select a parameter

The parameter My Data-Driven Parameter has been selected

Select a worksheet

The worksheet Sales by State has been selected

Select a field

The field State has been selected Clear

Filter parameter list based on worksheet selections

Formatting

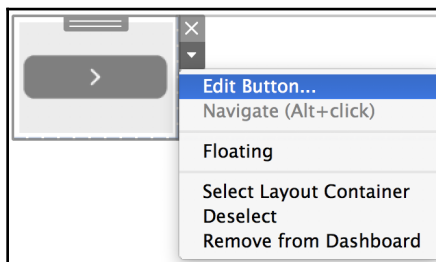
Background Color ●

Text Color ●

Clear Settings OK

Objects

| | |
|------------|---|
| Horizontal | Web Page |
| Vertical | <input type="checkbox"/> Blank |
| Text | <input checked="" type="checkbox"/> Button |
| Image | Extension |



Navigate to

Product ▾

Image

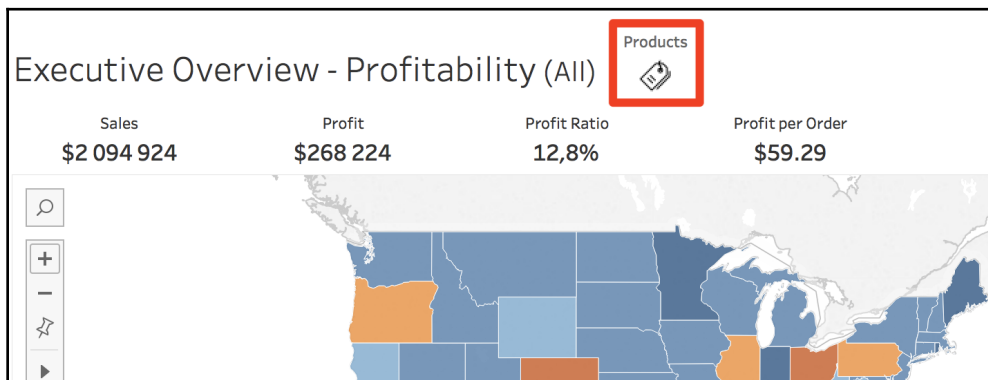
My button icon.jpg Choose

Tooltip

Click to go to the Product Dashboard ×

36/80 characters

Apply OK



Actions

Actions let you create interactive relationships between data, dashboard objects, other workbook sheets, and the web.

| Name | Run On | Source | Fields |
|------|--------|--------|--------|
| | | | |

Add Action > Filter... Edit... Remove

Highlight...

Go to URL...

Go to Sheet...

Show actions for Change Set Values... Cancel OK

Name:

Source Sheets

Sales and Profit analysis

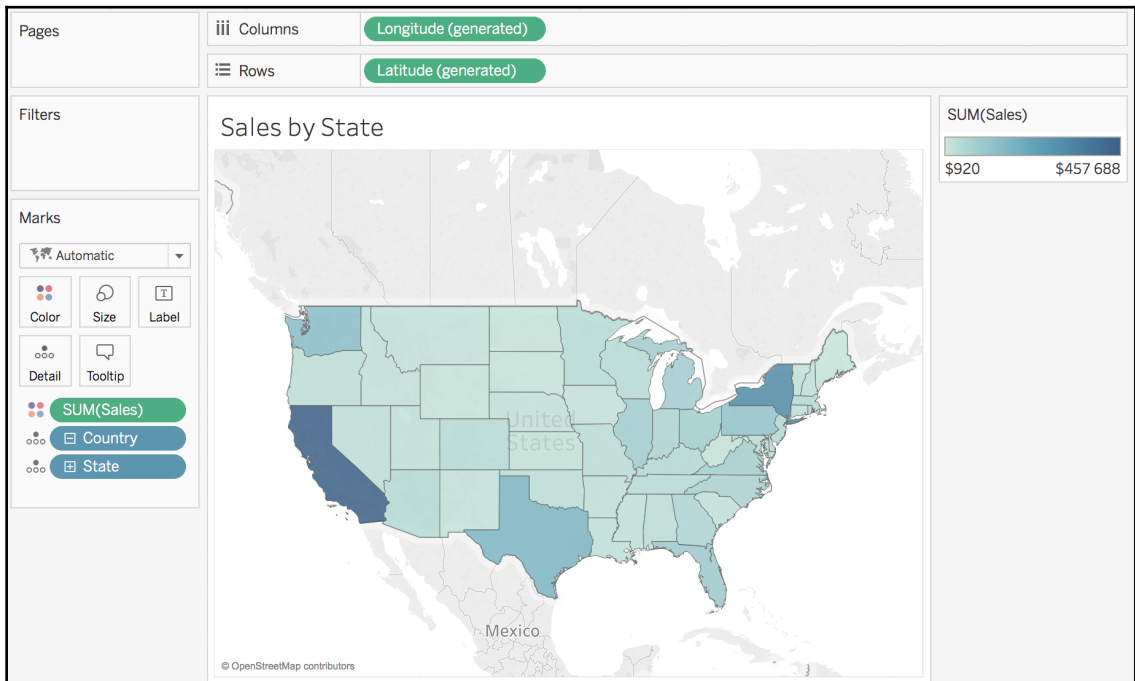
Run action on:

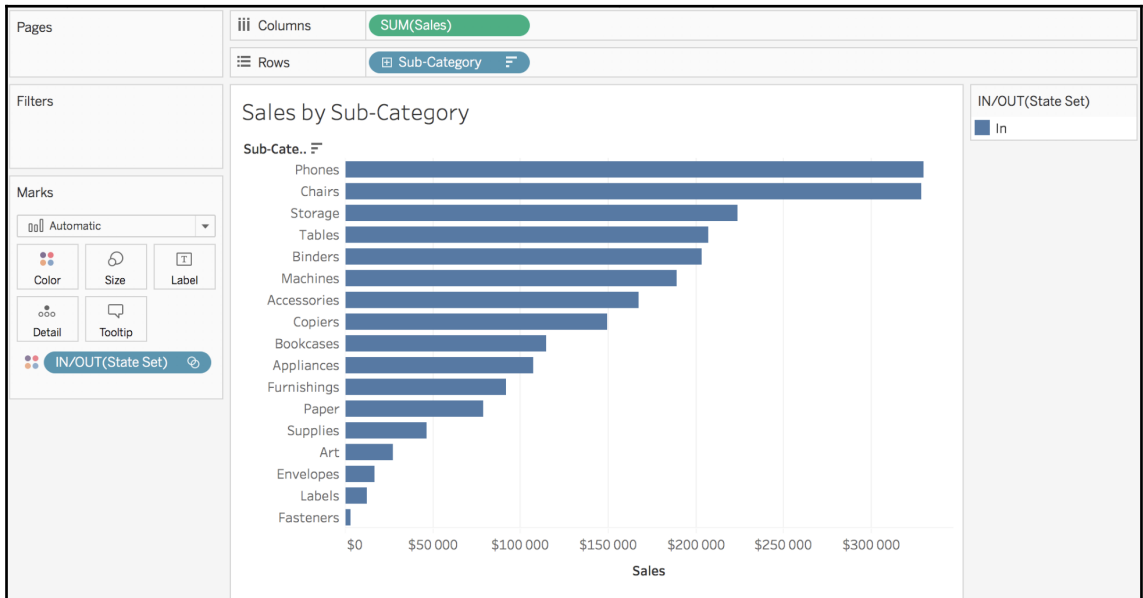
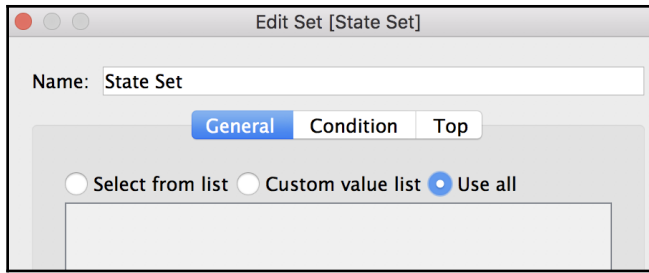
- Profit by State
- Profit Evolution
- Sales and Profit by Sub-Category

Run on single select only

Target Sheet

Order Details





Name:

Source Sheets

Change Set Value example

Run action on:

Sales by State

Sales by Sub-Category

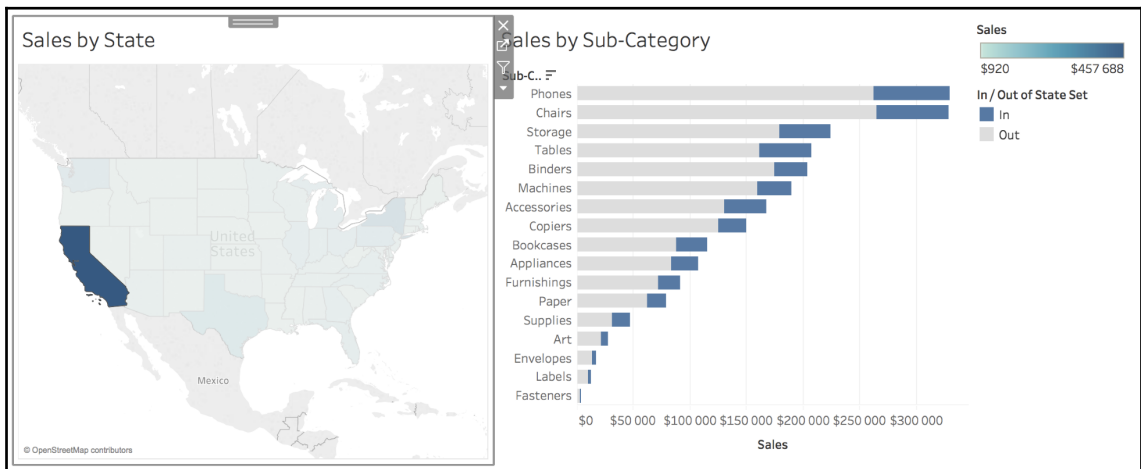
Target Set

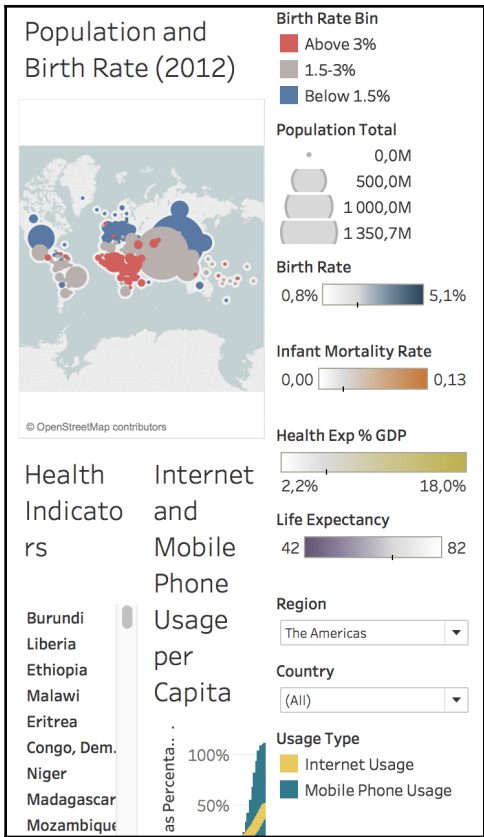
Clearing the selection will:

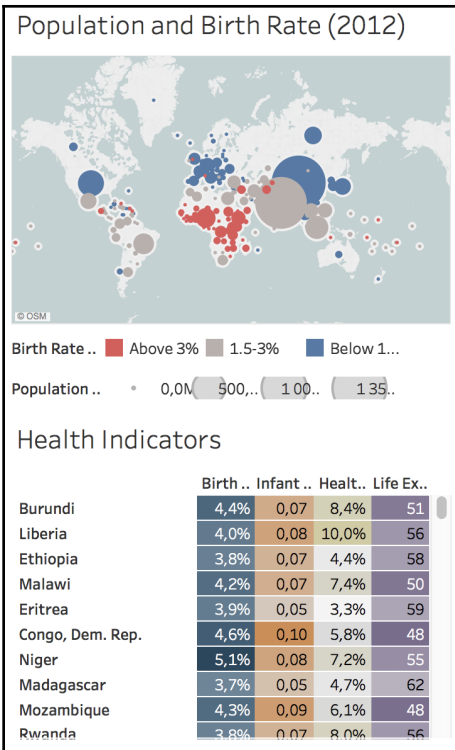
Keep set values

Add all values to set

Remove all values from set







Default

Phone

Device Preview

Rearrange layout

Delete layout

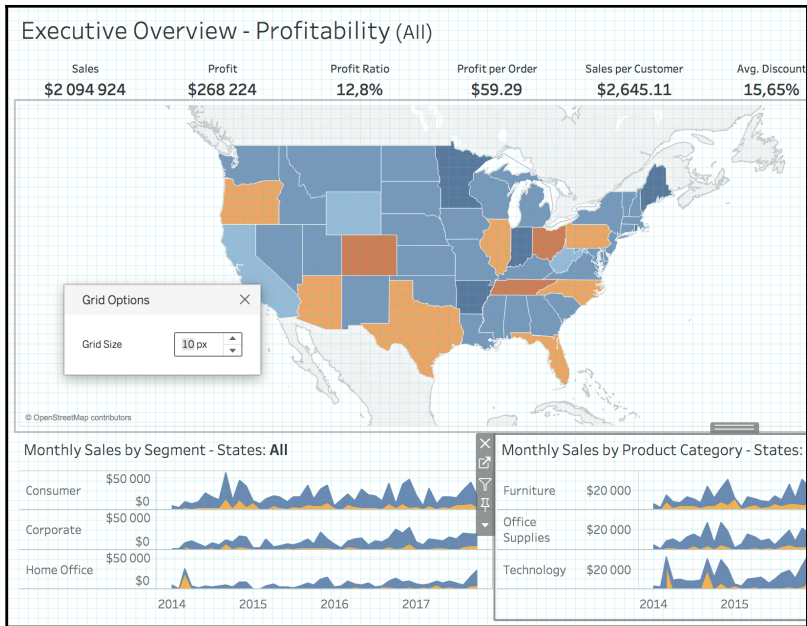


Tableau interface showing a 'Sales' project. The breadcrumb is 'Home / Sales'. The project name is 'Sales' with a folder icon and 'PROJECT' label. Below the project name, there are tabs for 'Projects 1', 'Workbooks 1', 'Views 9', 'Data sources 1', and 'Details'. A '+ New Workbook' button is visible, along with a dropdown showing '0 items selected'. A 'Sort by' dropdown is set to 'Views: All (Most-Least)'. A thumbnail of the 'Executive Overview - Profitability (All)' dashboard is shown. At the bottom, there is a 'Superstore' data source with '0 views' and a star icon.

Tableau interface showing the 'Sales' folder. The navigation bar includes 'Content', 'Users', 'Groups', 'Schedules', and 'Tasks'. The 'Sales' folder is owned by Tristan Guillevin. Below the folder name are 'Create' and 'Select All' buttons. The main content area displays three items:

- Sales Projection:** A bar chart visualization.
- Superstore:** A map visualization titled 'Executive Overview - Profitability by State' showing a heatmap of the United States. Above the map is a table with columns: Year, Profit, Profit Margin, Profit per User, Sales per User, Avg. Order Value, and Orders. The table data is as follows:

| Year | Profit | Profit Margin | Profit per User | Sales per User | Avg. Order Value | Orders |
|-------------|-----------|---------------|-----------------|----------------|------------------|--------|
| \$2,094,524 | \$288,224 | 13.8% | \$59.29 | \$5,049.15 | 15.97% | 34,302 |
- Superstore:** An 'EXTRACT' visualization with a last refresh timestamp of 'Sep 12, 2018, 9:11 AM' and owner 'Tristan Guillevin'.

Tableau interface showing the 'Settings' page. The navigation bar includes 'Content', 'Users', 'Groups', 'Schedules', 'Tasks', 'Status', and 'Settings'. The 'General' tab is selected, with other tabs being 'Authentication', 'Bridge', and 'Extensions'. The 'Save' button is highlighted in green.

Send email to data source and workbook owners when scheduled refreshes fail

Support Access

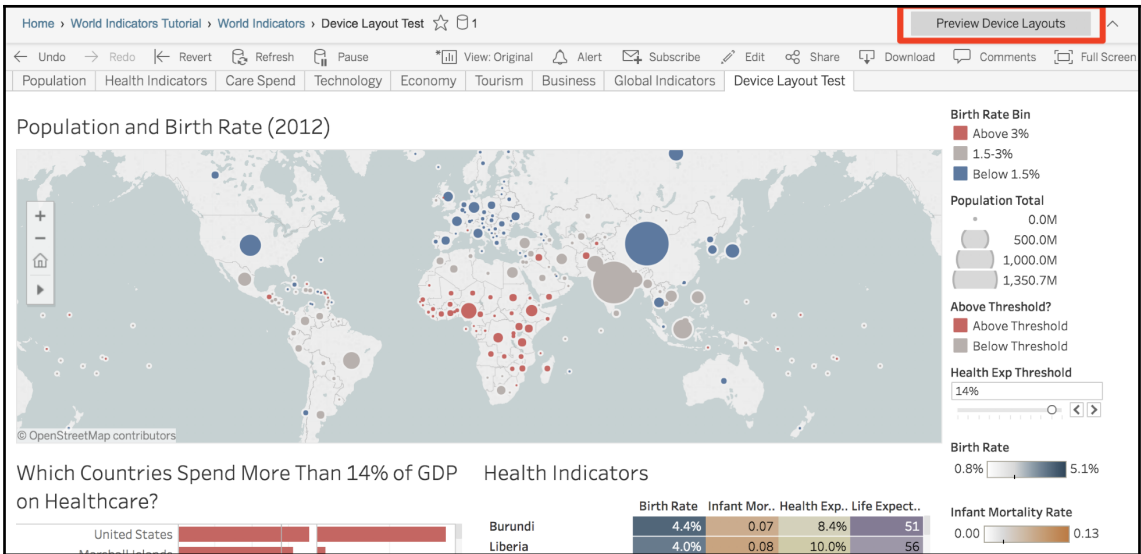
Allows approved Tableau support staff Administrator-level access to your Tableau Online site and its content. By selecting this option, you represent that you have authority to make this decision on behalf of your organization. This access is subject to the agreement between you and Tableau and to Tableau's Privacy Policy. To discontinue access, you can clear the check box at any time.

Allow support access

New Browsing Experience BETA

We've been working on a new browsing experience that provides a simple, flexible way to organize and display content on your site, along with a bunch of other improvements. [Learn more](#)

Enable new browsing experience





Chapter 2: The Tableau Core

The screenshot displays the Tableau interface, divided into three main sections:

- Connect (Left Panel):** A dark blue sidebar with a grid icon at the top. It lists connection options under three categories:
 - To a File:** Microsoft Excel (highlighted), Text file, JSON file, PDF file, Spatial file, Statistical file, More...
 - To a Server:** Tableau Server, Google Sheets, Microsoft SQL Server, Amazon Redshift, MySQL, More...
 - Saved Data Sources:** Sample - Superstore, World Indicators
- Open (Main Area):** A light gray area with the heading "Open". It features two rows of workbook thumbnails:
 - Top Row:** "Hit It's me!" (with a thumbnail for TRISTAN GUILLEVIN), "Regional" (with a map of the US), and "Superstore Sank..." (with a thumbnail for Superstore Interactive Data Storybook v1.0). A link "Open a Workbook" is positioned to the right.
 - Bottom Row:** "Superstore" (with a thumbnail of a bar chart), "Regional" (with a map of the US), and "World Indicators" (with a thumbnail of a bar chart). A link "More Samples" is positioned to the right.
- Discover (Right Panel):** A light gray sidebar with the heading "Discover". It lists various resources:
 - Training:** Getting Started, Connecting to Data, Visual Analytics, Understanding Tableau, More training videos...
 - Viz of the Week:** Ramadan O'Clock
 - Resources:** Get Tableau Prep, Blog - Artificial Intelligence startup Empirical Systems joins Tableau, Tableau Conference Register by 7/13 to save \$200, Forums

Orders (Sample - Superstore)

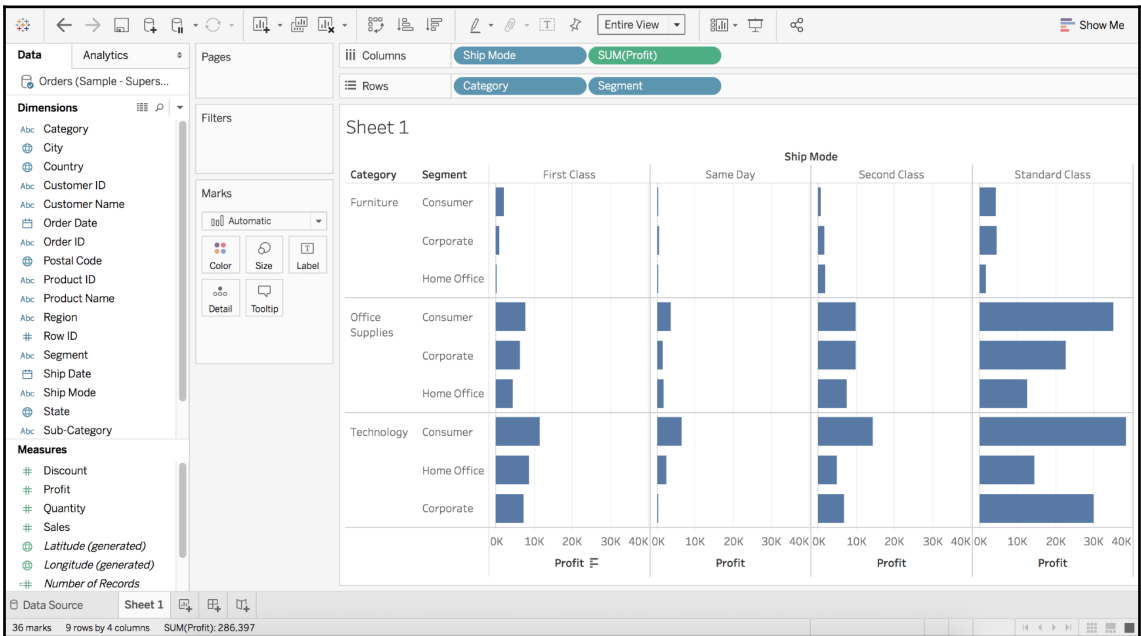
Connection: Live Extract

Filters: 0 | Add

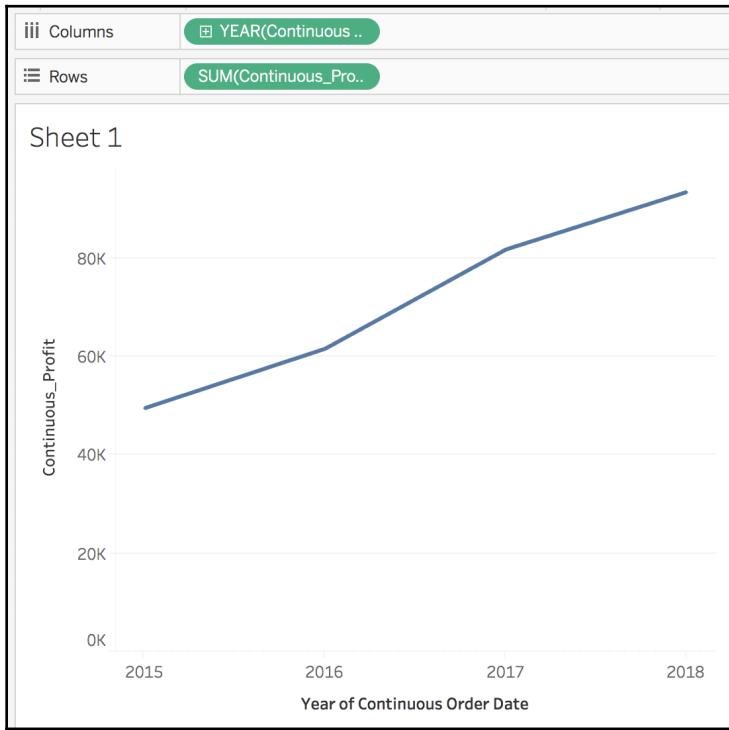
Sort fields: Data source order

Show aliases Show hidden fields 1 000 rows

| Row ID | Order ID | Order Date | Ship Date | Ship Mode | Customer ID | Customer Name | Segment | Country |
|--------|----------------|------------|------------|----------------|-------------|-----------------|-----------|---------|
| 1 | CA-2017-152156 | 08/11/2017 | 11/11/2017 | Second Class | CG-12520 | Claire Gute | Consumer | Unit |
| 2 | CA-2017-152156 | 08/11/2017 | 11/11/2017 | Second Class | CG-12520 | Claire Gute | Consumer | Unit |
| 3 | CA-2017-138688 | 12/06/2017 | 16/06/2017 | Second Class | DV-13045 | Darrin Van Huff | Corporate | Unit |
| 4 | US-2016-108966 | 11/10/2016 | 18/10/2016 | Standard Class | SO-20335 | Sean O'Donnell | Consumer | Unit |
| 5 | US-2016-108966 | 11/10/2016 | 18/10/2016 | Standard Class | SO-20335 | Sean O'Donnell | Consumer | Unit |
| 6 | CA-2015-115812 | 09/06/2015 | 14/06/2015 | Standard Class | BH-11710 | Brosina Hoffman | Consumer | Unit |
| 7 | CA-2015-115812 | 09/06/2015 | 14/06/2015 | Standard Class | BH-11710 | Brosina Hoffman | Consumer | Unit |
| 8 | CA-2015-115812 | 09/06/2015 | 14/06/2015 | Standard Class | BH-11710 | Brosina Hoffman | Consumer | Unit |



| Columns | | | | |
|----------------------|---------------------|------|------|------|
| YEAR(Discrete Ord..) | | | | |
| Rows | | | | |
| SUM(Discrete_Profit) | | | | |
| Sheet 1 | | | | |
| | Discrete Order Date | | | |
| Discrete_Profit | 2015 | 2016 | 2017 | 2018 |
| 49 543,97 | Abc | | | |
| 61 618,60 | Abc | | | |
| 81 795,17 | Abc | | | |
| 93 439,27 | Abc | | | |



Sample Superstore

Connection
 Live Extract

Orders

Specify your extract schema:

Schema

Single Table Multiple Tables

Tableau will store your extract in a single table.

Specify how much data to extract:

Filters (optional)

| Filter | Details |
|--------|---------|
|--------|---------|

Aggregation

Aggregate data for visible dimensions

Roll up dates to

Number of Rows

All rows

Incremental refresh

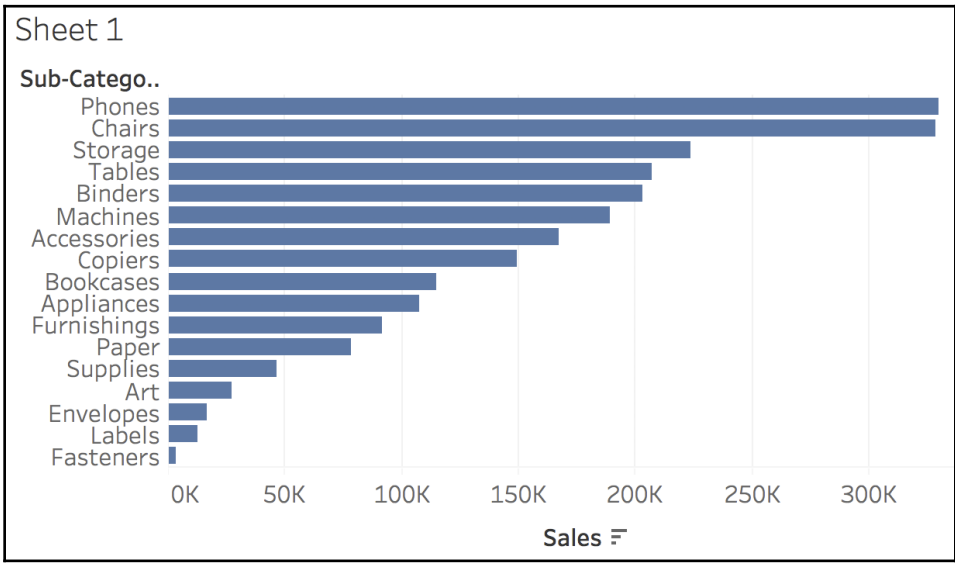
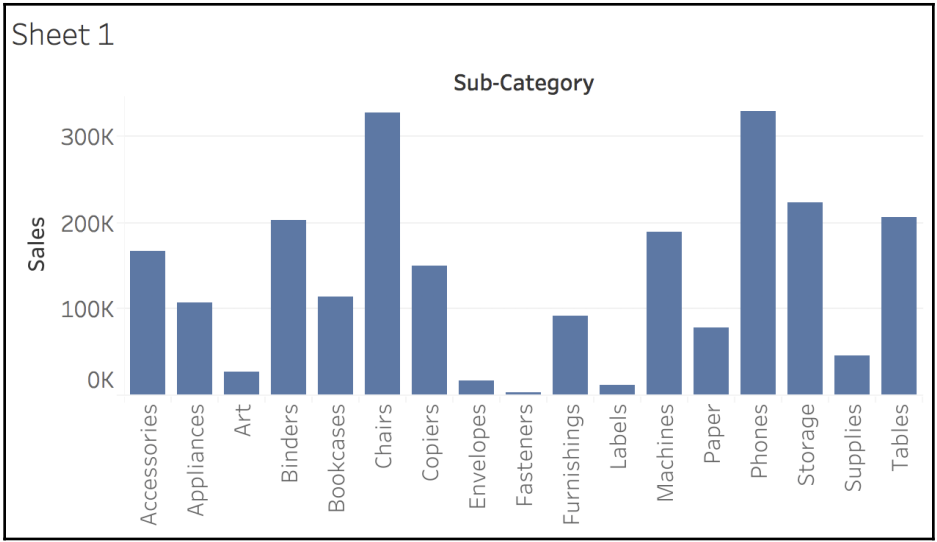
Top: rows

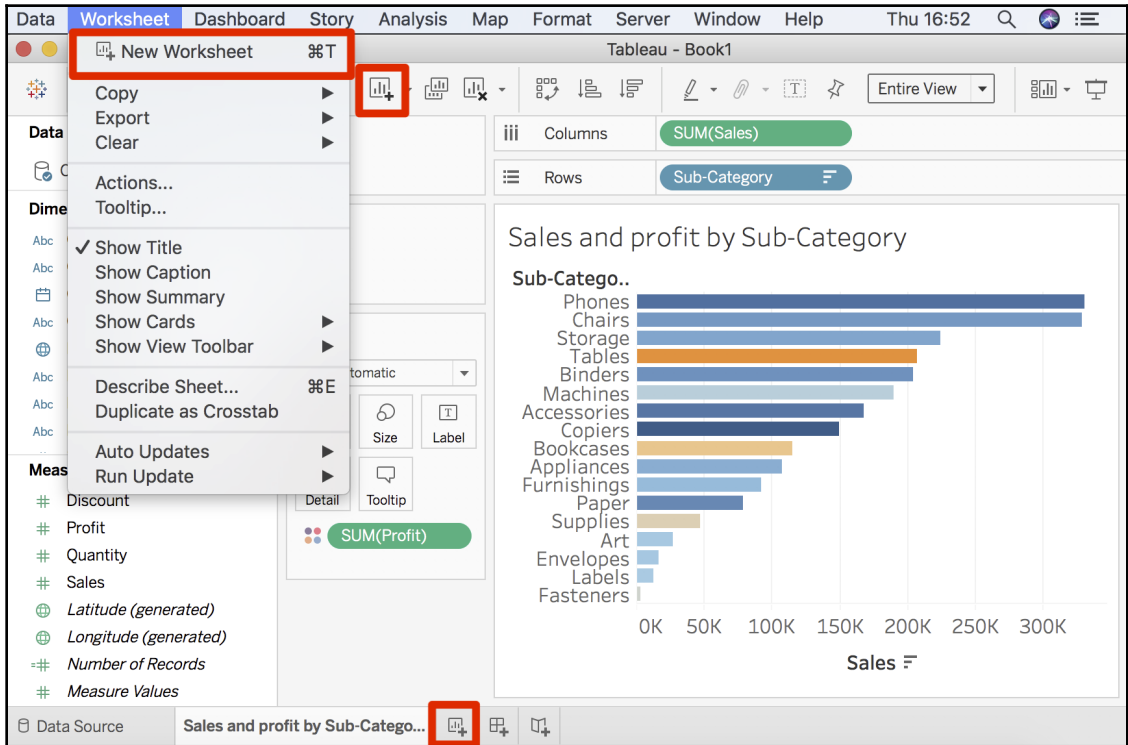
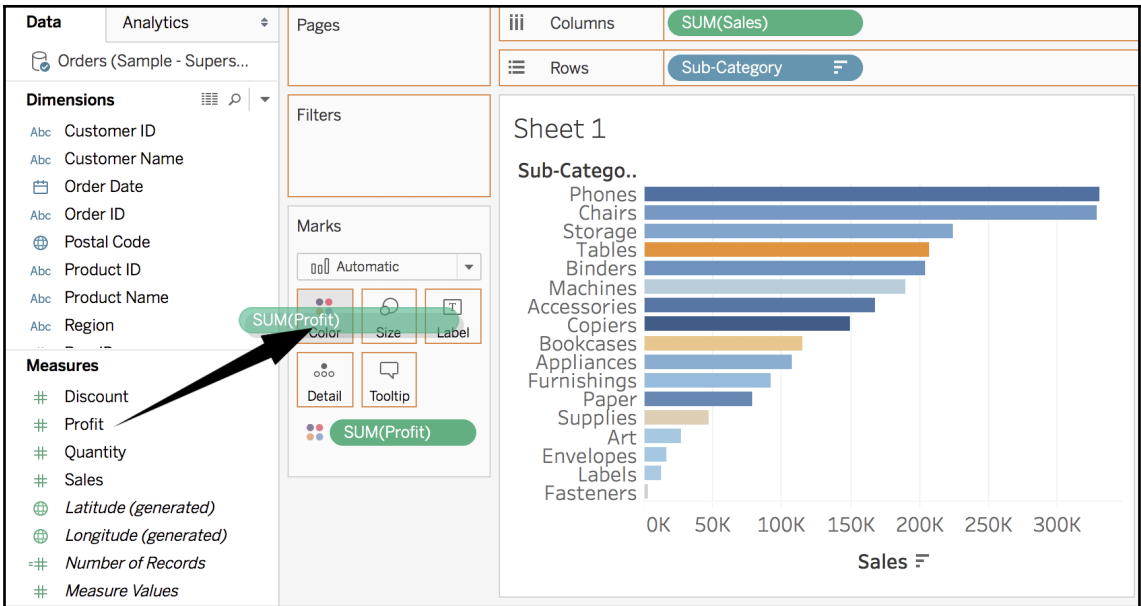
Sample:

Chapter 3: A First Dashboard and Exploration

The screenshot shows the Tableau Desktop interface. On the left, the 'Connections' pane lists 'Sample - Superstore' (Microsoft Excel). Below it, the 'Sheets' pane lists 'Orders', 'People', 'Returns', and 'New Union'. An arrow points from the 'Orders' sheet in the 'Sheets' pane to the main view area. The main view area is titled 'Sample - Superstore' and contains a large empty space with the text 'Drag sheets here'. Below the main view area, there are controls for 'Sort fields' (set to 'Data source order') and a checkbox for 'Show aliases'.

| Row ID | Order ID | Order Date | Ship Date | Ship Mode | Customer ID | Customer Name | Segment | Country | City | State | Postal Code |
|--------|----------------|------------|------------|----------------|-------------|-----------------|-------------|---------------|-----------------|----------------|-------------|
| 1 | CA-2017-152156 | 08/11/2017 | 11/11/2017 | Second Class | CG-12520 | Claire Gute | Consumer | United States | Henderson | Kentucky | 42420 |
| 2 | CA-2017-152156 | 08/11/2017 | 11/11/2017 | Second Class | CG-12520 | Claire Gute | Consumer | United States | Henderson | Kentucky | 42420 |
| 3 | CA-2017-138688 | 12/06/2017 | 16/06/2017 | Second Class | DV-13045 | Darrin Van Huff | Corporate | United States | Los Angeles | California | 90036 |
| 4 | US-2016-108966 | 11/10/2016 | 18/10/2016 | Standard Class | SO-20335 | Sean O'Donnell | Consumer | United States | Fort Lauderdale | Florida | 33311 |
| 5 | US-2016-108966 | 11/10/2016 | 18/10/2016 | Standard Class | SO-20335 | Sean O'Donnell | Consumer | United States | Fort Lauderdale | Florida | 33311 |
| 6 | CA-2015-115812 | 09/06/2015 | 14/06/2015 | Standard Class | BH-11710 | Brosina Hoffman | Consumer | United States | Los Angeles | California | 90032 |
| 7 | CA-2015-115812 | 09/06/2015 | 14/06/2015 | Standard Class | BH-11710 | Brosina Hoffman | Consumer | United States | Los Angeles | California | 90032 |
| 8 | CA-2015-115812 | 09/06/2015 | 14/06/2015 | Standard Class | BH-11710 | Brosina Hoffman | Consumer | United States | Los Angeles | California | 90032 |
| 9 | CA-2015-115812 | 09/06/2015 | 14/06/2015 | Standard Class | BH-11710 | Brosina Hoffman | Consumer | United States | Los Angeles | California | 90032 |
| 10 | CA-2015-115812 | 09/06/2015 | 14/06/2015 | Standard Class | BH-11710 | Brosina Hoffman | Consumer | United States | Los Angeles | California | 90032 |
| 11 | CA-2015-115812 | 09/06/2015 | 14/06/2015 | Standard Class | BH-11710 | Brosina Hoffman | Consumer | United States | Los Angeles | California | 90032 |
| 12 | CA-2015-115812 | 09/06/2015 | 14/06/2015 | Standard Class | BH-11710 | Brosina Hoffman | Consumer | United States | Los Angeles | California | 90032 |
| 13 | CA-2018-114412 | 15/04/2018 | 20/04/2018 | Standard Class | AA-10480 | Andrew Allen | Consumer | United States | Concord | North Carolina | 28027 |
| 14 | CA-2017-161389 | 05/12/2017 | 10/12/2017 | Standard Class | IM-15070 | Irene Maddox | Consumer | United States | Seattle | Washington | 98103 |
| 15 | US-2016-118983 | 22/11/2016 | 26/11/2016 | Standard Class | HP-14815 | Harold Pawtan | Home Office | United States | Fort Worth | Texas | 76106 |





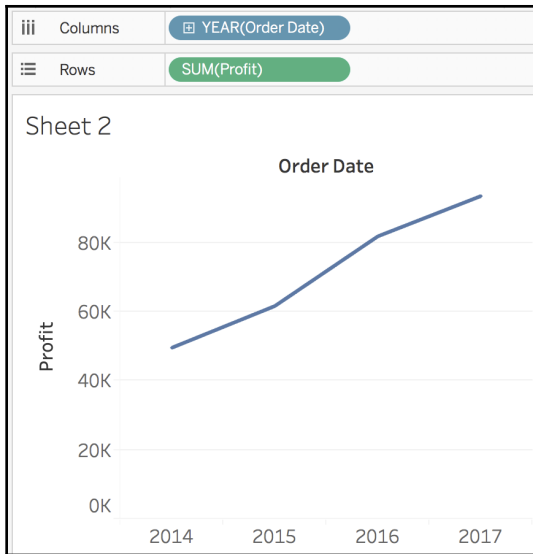


Tableau - Book1

Columns: YEAR(Order Date)

Rows: SUM(Profit)

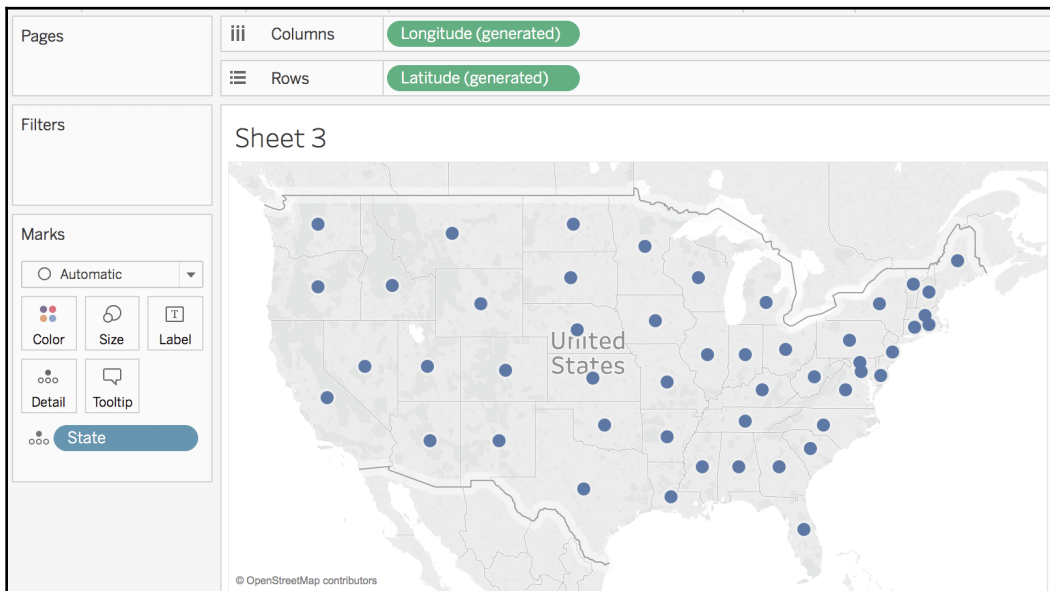
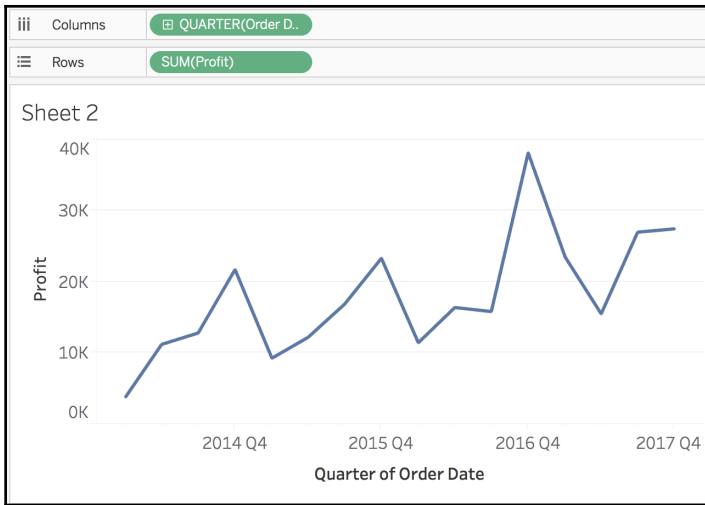
Sheet 2

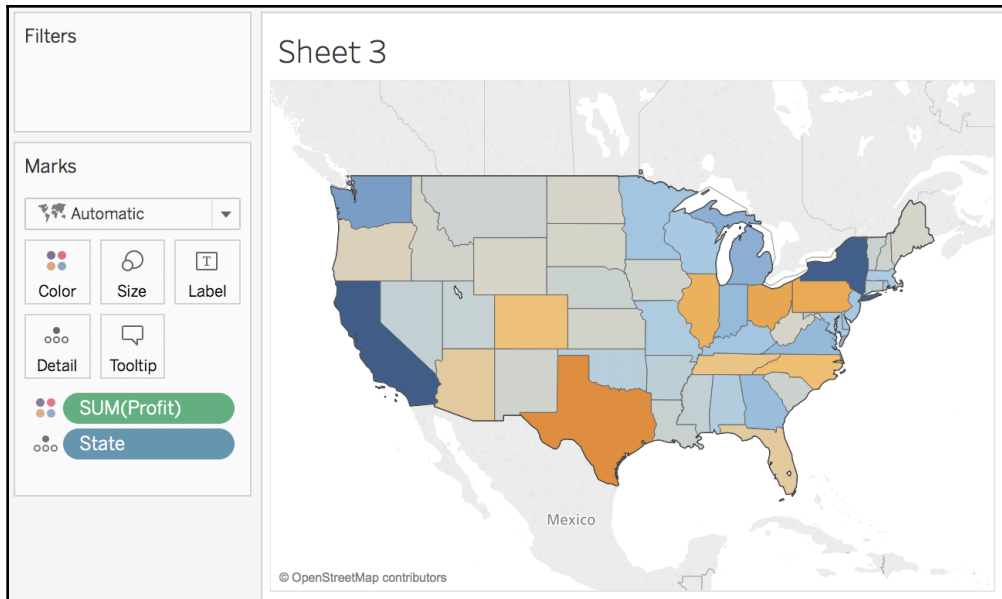
Profit

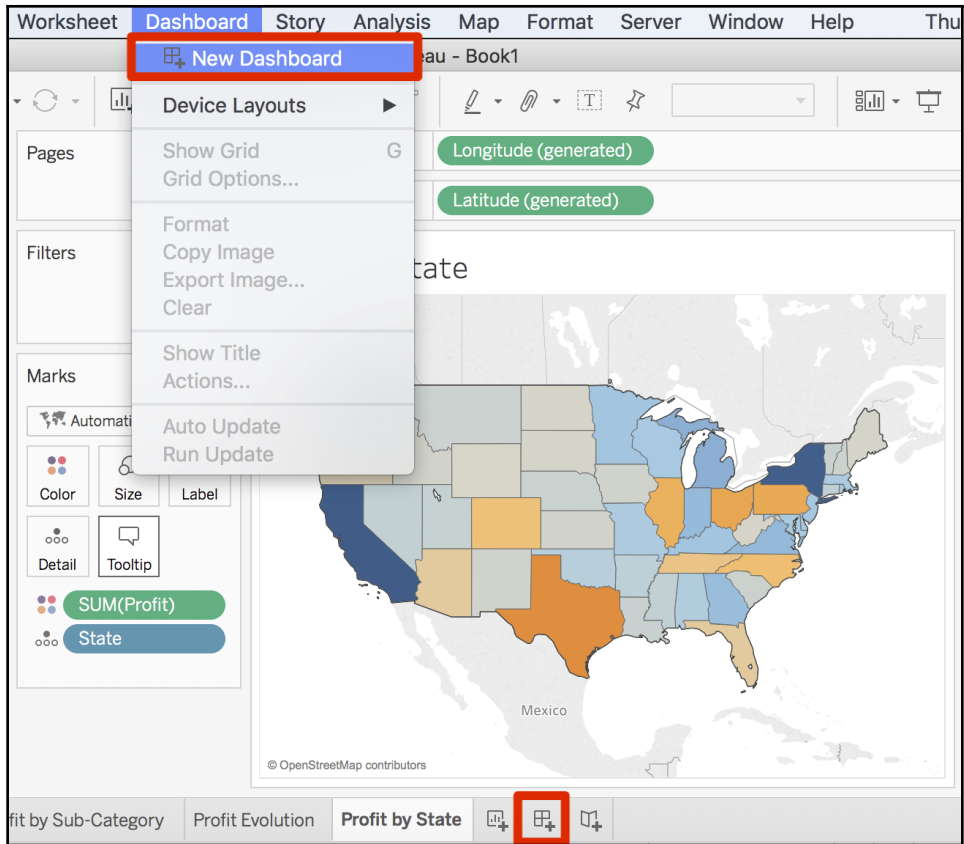
Order Date

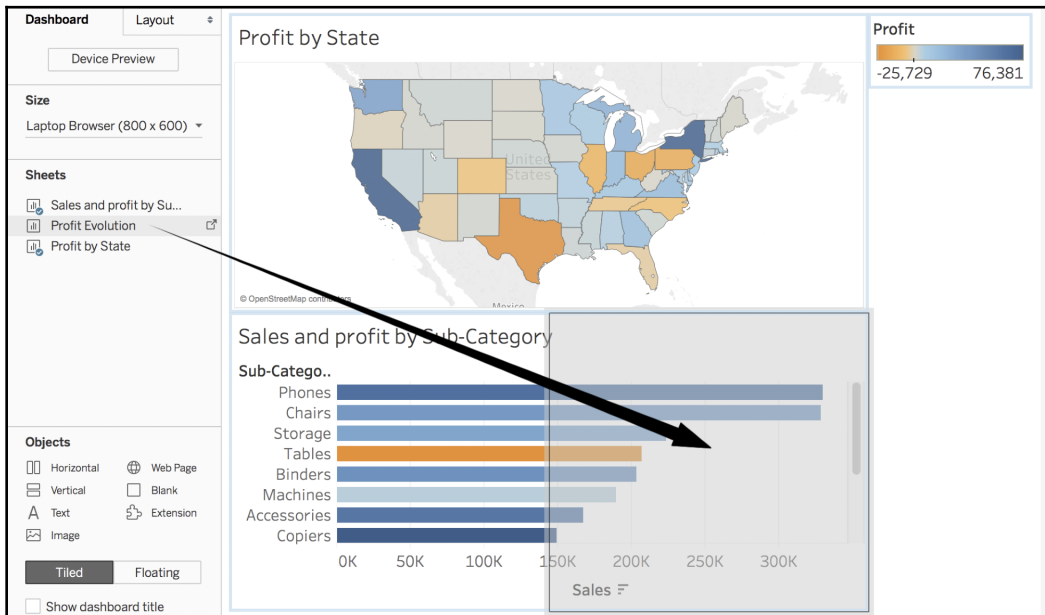
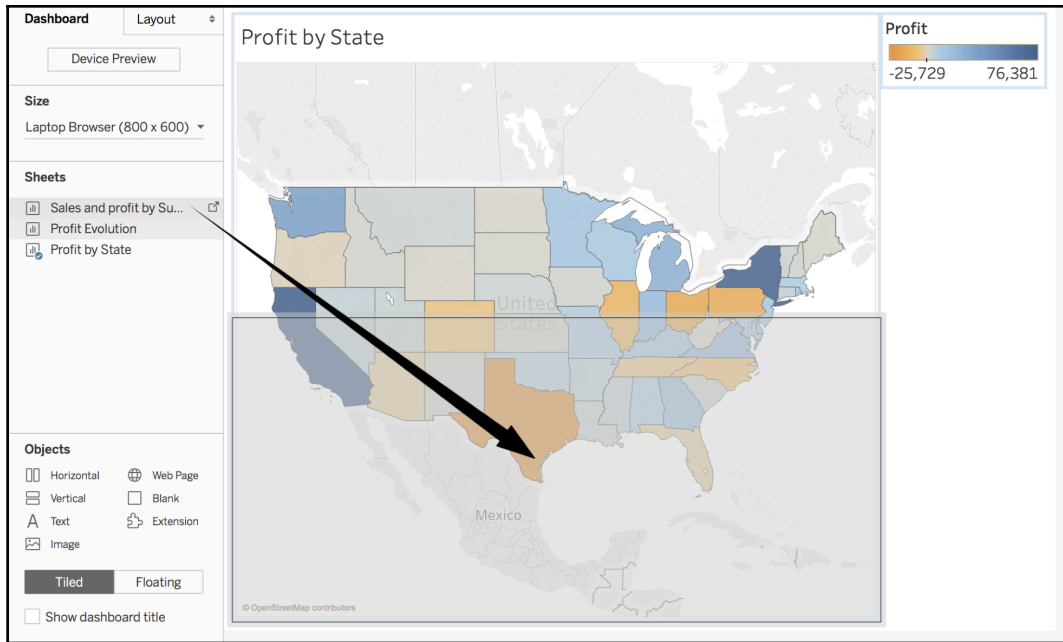
2014

- Filter...
 - Show Filter
 - Show Highlighter
- Sort...
- Format...
- ✓ Show Header
- ✓ Include in Tooltip
- Show Missing Values
- ✓ Year 2015
 - Quarter Q2
 - Month May
 - Day 8
 - More ▶
- Year 2015
 - Quarter Q2**
 - Month May 2015
 - Week Number Week 5, 2015
 - Day May 8, 2015
 - More ▶
- Exact Date
- Attribute Measure ▶
- ✓ Discrete














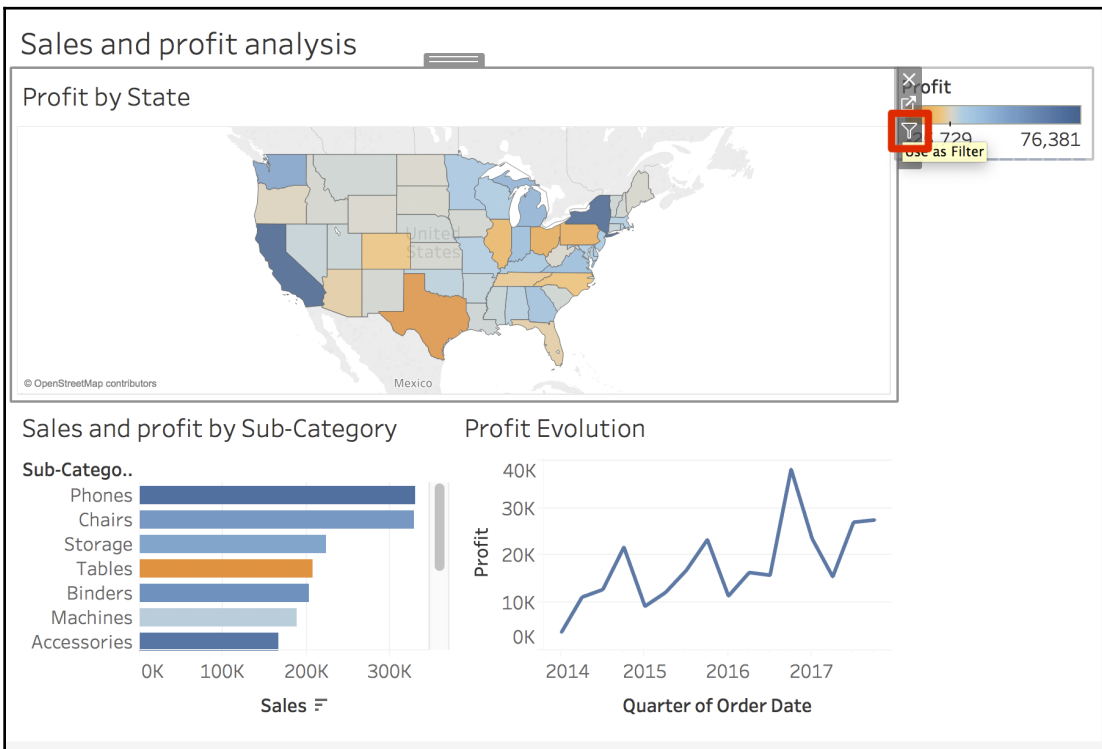


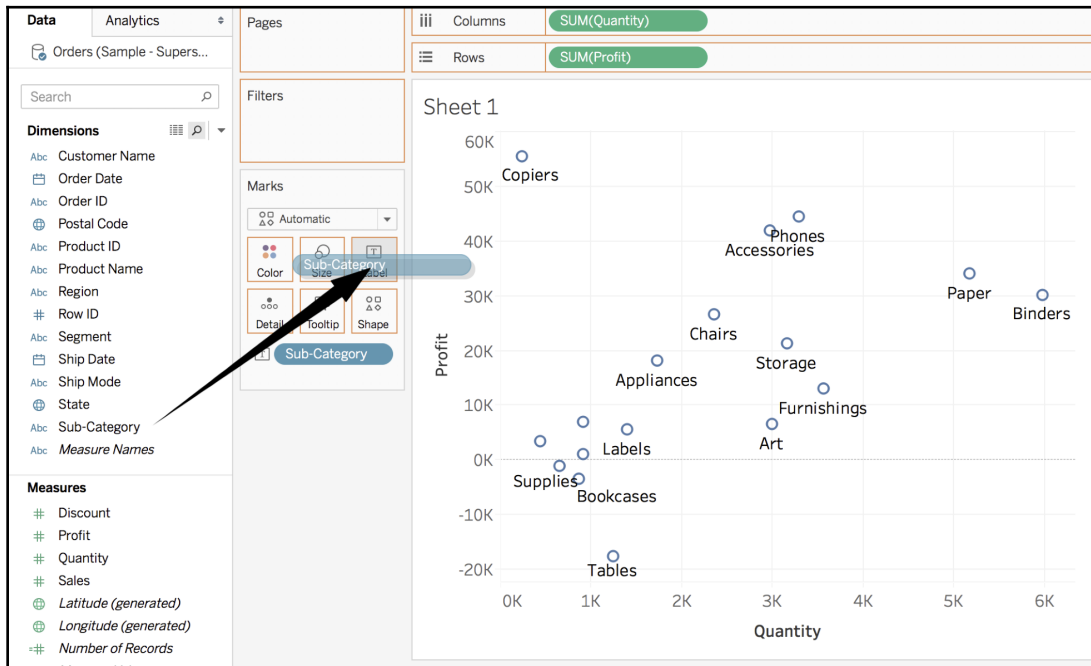
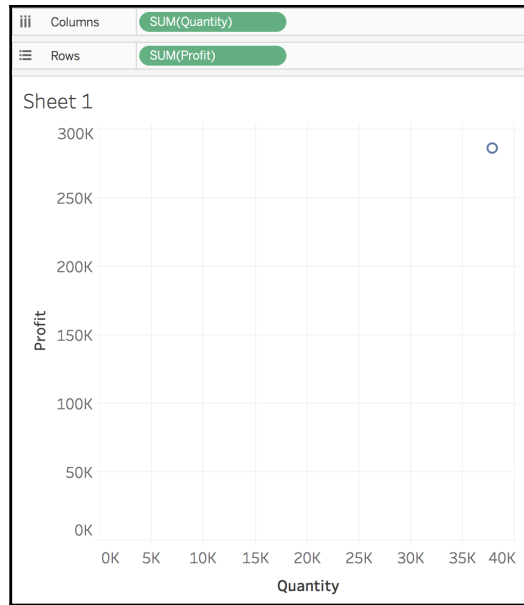
Objects

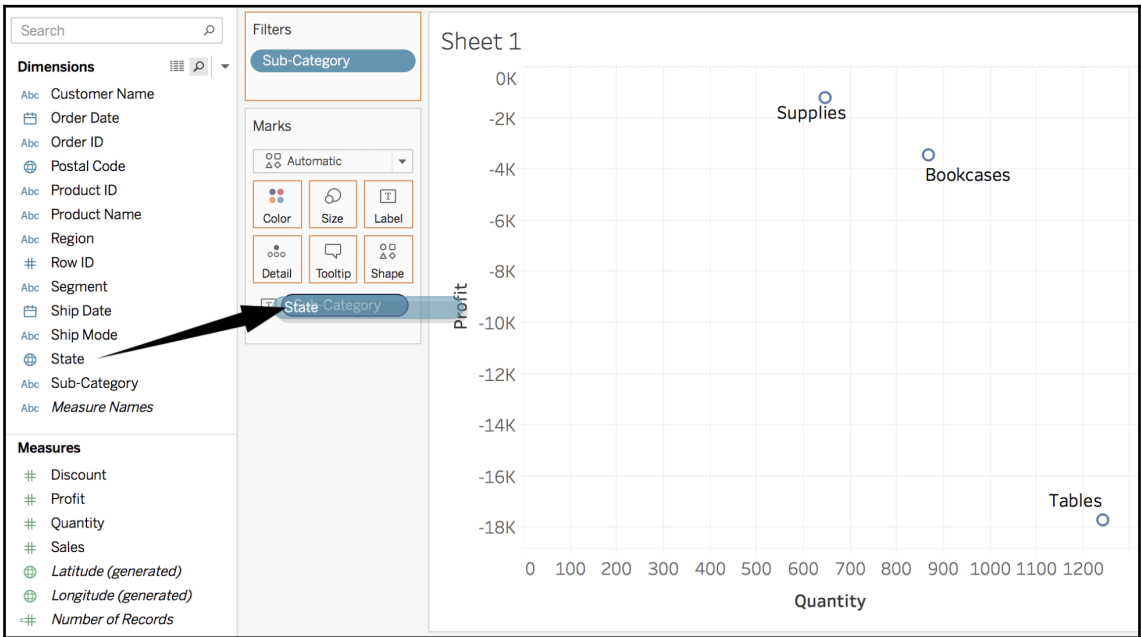
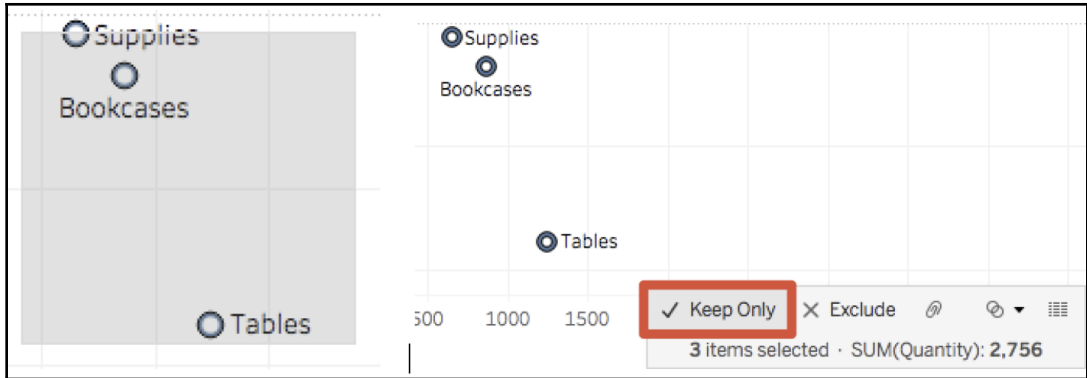
-  Horizontal
-  Vertical
-  Text
-  Image
-  Web Page
-  Blank
-  Extension

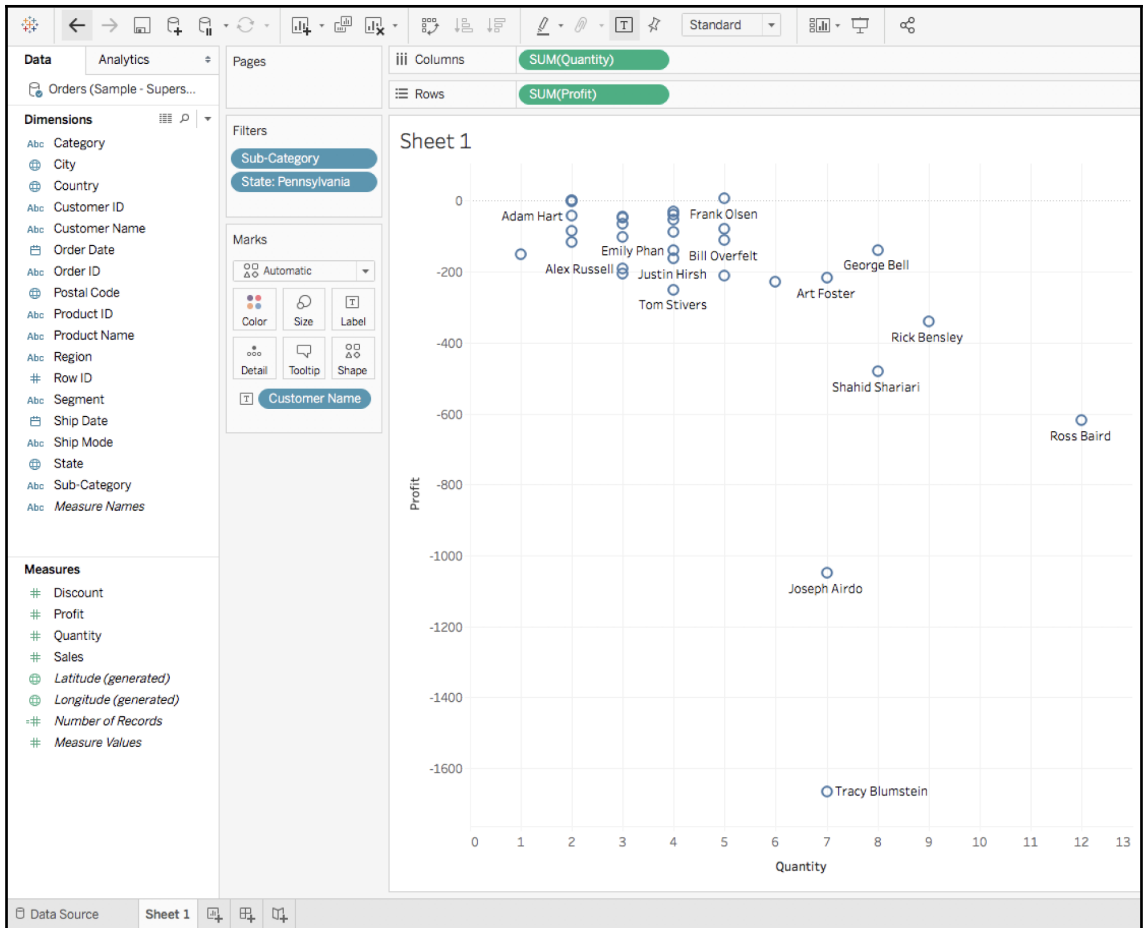
Tiled
 Floating

Show dashboard title

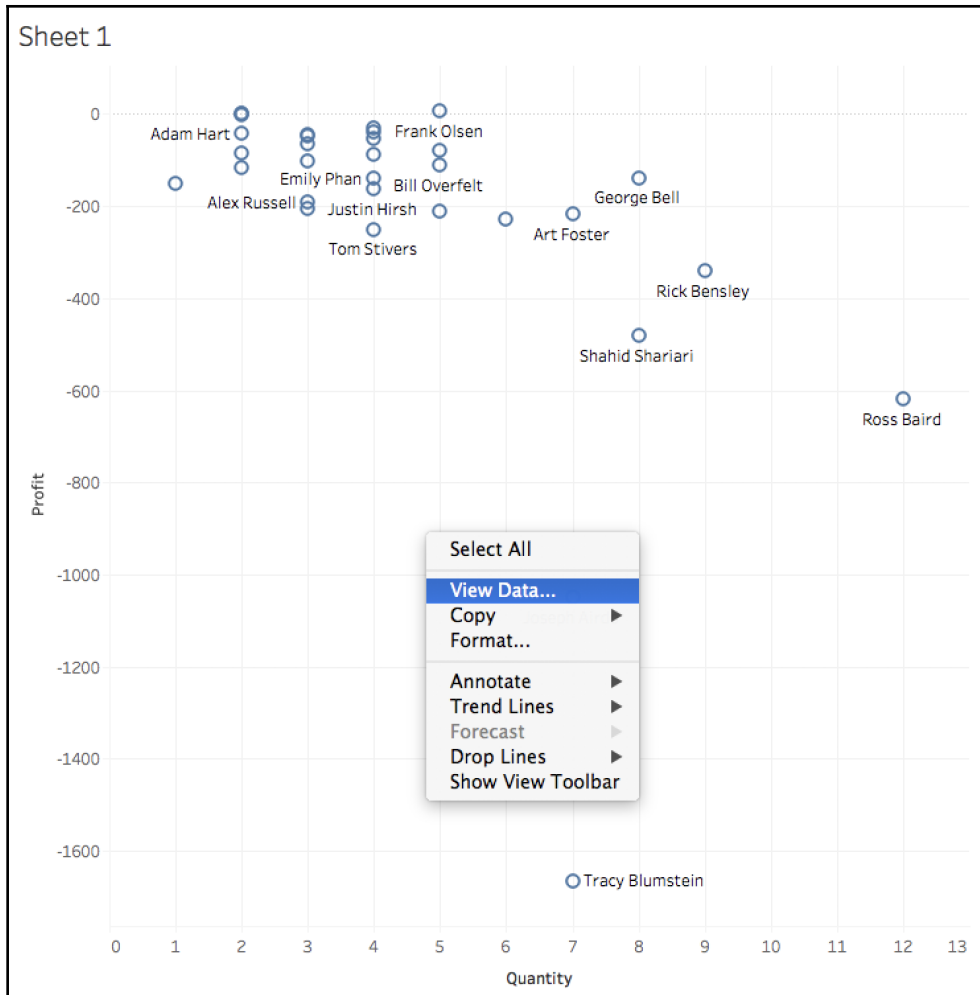








Sheet 1



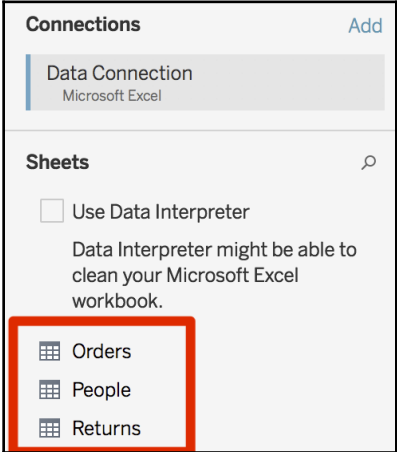
View Data: Sheet 1

37 rows Show aliases Show all fields

| Category | City | Country | Customer ID | Customer Name | Order Date | Order ID | Postal Code | Product ID | Product Name |
|-----------------|--------------|---------------|-------------|---------------------|------------|----------------|-------------|-----------------|---|
| Furniture | Philadelphia | United States | TB-21520 | Tracy Blumstein | 17/09/2016 | US-2016-150630 | 19140 | FUR-BO-10004834 | Riverside Palais Royal Lawyers Bookcas |
| Office Supplies | Philadelphia | United States | MC-18145 | Mike Gockenbach | 03/09/2016 | US-2016-138303 | 19134 | OFF-SU-10002881 | Martin Yale Chadless Opener Electric |
| Office Supplies | Philadelphia | United States | TP-21130 | Theone Pippenger | 14/07/2017 | CA-2017-120180 | 19134 | OFF-SU-10004115 | Acme Stainless Steel Office Snips |
| Office Supplies | Philadelphia | United States | CK-12205 | Chloris Kastensmidt | 16/07/2017 | US-2017-100720 | 19120 | OFF-SU-10001574 | Acme Value Line Scissors |
| Furniture | Philadelphia | United States | RB-19795 | Ross Baird | 28/11/2018 | US-2018-110576 | 19120 | FUR-TA-10004154 | Riverside Furniture Oval Coffee Table, |
| Office Supplies | Philadelphia | United States | SD-20485 | Shirley Daniels | 06/04/2015 | US-2015-118486 | 19143 | OFF-SU-10004498 | Martin-Yale Premier Letter Opener |
| Furniture | Philadelphia | United States | SD-20485 | Shirley Daniels | 06/04/2015 | US-2015-118486 | 19143 | FUR-TA-10001039 | KI Adjustable-Height Table |
| Furniture | Philadelphia | United States | TS-21610 | Troy Staebel | 16/08/2015 | CA-2015-142839 | 19143 | FUR-TA-10001539 | Chromcraft Rectangular Conference Ta |
| Office Supplies | Philadelphia | United States | JA-15970 | Joseph Airdo | 22/09/2018 | CA-2018-158379 | 19134 | OFF-SU-10002881 | Martin Yale Chadless Opener Electric L |
| Furniture | Philadelphia | United States | EP-13915 | Emily Phan | 07/11/2018 | CA-2018-149888 | 19120 | FUR-TA-10000849 | Bevis Rectangular Conference Tables |
| Furniture | Philadelphia | United States | VT-21700 | Valerie Takahito | 05/04/2016 | CA-2016-167010 | 19143 | FUR-BO-10004218 | Bush Heritage Pine Collection 5-Shelf B |
| Office Supplies | Lancaster | United States | MS-17770 | Maxwell Schwartz | 03/11/2015 | CA-2015-137589 | 17602 | OFF-SU-10000157 | Compact Automatic Electric Letter Ope |
| Furniture | Philadelphia | United States | SM-20950 | Suzanne McNair | 29/09/2015 | CA-2015-122931 | 19134 | FUR-TA-10004175 | Hon 30" x 60" Table with Locking Draw |
| Furniture | Philadelphia | United States | SM-20950 | Suzanne McNair | 29/09/2015 | CA-2015-122931 | 19134 | FUR-TA-10004147 | Hon 4060 Series Tables |
| Furniture | Philadelphia | United States | GB-14530 | George Bell | 29/08/2017 | CA-2017-159912 | 19120 | FUR-TA-10004152 | Barricks 18" x 48" Non-Folding Utility |
| Furniture | Philadelphia | United States | GB-14530 | George Bell | 29/08/2017 | CA-2017-159912 | 19120 | FUR-BO-10002853 | O'Sullivan 5-Shelf Heavy-Duty Bookcas |
| Furniture | Philadelphia | United States | RB-19465 | Rick Bensley | 21/08/2017 | US-2017-146066 | 19143 | FUR-TA-10002530 | Iceberg OfficeWorks 42" Round Tables |
| Furniture | Philadelphia | United States | RL-19615 | Rob Lucas | 07/07/2018 | US-2018-169551 | 19120 | FUR-BO-10001519 | O'Sullivan 3-Shelf Heavy-Duty Bookcas |
| Furniture | Reading | United States | TS-21430 | Tom Stivers | 11/11/2015 | CA-2015-155796 | 19601 | FUR-BO-10002545 | Atlantic Metals Mobile 3-Shelf Bookcas |
| Furniture | Philadelphia | United States | Dp-13240 | Dean percer | 22/08/2018 | US-2018-132381 | 19143 | FUR-TA-10002356 | Bevis Boat-Shaped Conference Table |
| Furniture | Philadelphia | United States | BS-11590 | Brendan Sweed | 14/01/2015 | CA-2015-149524 | 19140 | FUR-BO-10003433 | Sauder Cornerstone Collection Library |
| Office Supplies | Philadelphia | United States | JC-15775 | John Castell | 25/07/2018 | CA-2018-121293 | 19143 | OFF-SU-10004884 | Acme Galleria Hot Forged Steel Scissor |
| Furniture | Philadelphia | United States | JC-15775 | John Castell | 25/07/2018 | CA-2018-121293 | 19143 | FUR-TA-10001771 | Bush Cubix Conference Tables, Fully A |
| Office Supplies | Philadelphia | United States | SV-20365 | Seth Vernon | 18/07/2018 | US-2018-165358 | 19134 | OFF-SU-10004768 | Acme Kleencut Forged Steel Scissors |

Summary Full Data 37 rows

Chapter 4: Connect to Data and Simple Transformations



Connect

Search

To a File

- Microsoft Excel
- Text file
- JSON file
- PDF file
- Spatial file
- Statistical file
- More...

To a Server

- Tableau Server
- Microsoft SQL Server
- MySQL
- Oracle
- Amazon Redshift
- More... >

Saved Data Sources

- Sample - Superstore
- World Indicators

| | | |
|--------------------------|---------------------------------------|------------------------|
| Tableau Server | Intuit QuickBooks Online (9.3-2018.1) | Teradata |
| Amazon Athena | Kognitio | Web Data Connector |
| Amazon Aurora | MapR Hadoop Hive | |
| Amazon EMR Hadoop Hive | Marketo | Other Databases (ODBC) |
| Amazon Redshift | MemSQL | |
| Anaplan | Microsoft SQL Server | |
| Apache Drill | MongoDB BI Connector | |
| Aster Database | MySQL | |
| Box | OData | |
| Cloudera Hadoop | OneDrive | |
| Denodo | Oracle | |
| Dropbox | Oracle Eloqua | |
| EXASOL | Pivotal Greenplum Database | |
| Firebird | PostgreSQL | |
| Google Analytics | Presto | |
| Google BigQuery | Salesforce | |
| Google Cloud SQL | SAP HANA | |
| Google Sheets | ServiceNow ITSM | |
| Hortonworks Hadoop Hive | SharePoint Lists | |
| HP Vertica | Snowflake | |
| Intuit QuickBooks Online | Spark SQL | |

← → 📄 ↻
Datasource
Connection
 Live Extract
Filters
0 | Add

Data

Sort fields
Data source order
Show aliases
Show hidden fields
1 000 rows

| # | Abc Data | Abc Data | Abc Data | Abc Data | Abc Data | Abc Data |
|--------|----------------|------------|------------|----------------|-------------|----------|
| Row ID | Order ID | Order Date | Ship Date | Ship Mode | Customer ID | Customer |
| 1 | CA-2017-152156 | 08/11/2017 | 11/11/2017 | Second Class | CG-12520 | Claire G |
| 2 | CA-2017-152156 | 08/11/2017 | 11/11/2017 | Second Class | CG-12520 | Claire G |
| 3 | CA-2017-138688 | 12/06/2017 | 16/06/2017 | Second Class | DV-13045 | Darrin |
| 4 | US-2016-108966 | 11/10/2016 | 18/10/2016 | Standard Class | SO-20335 | Sean O' |
| 5 | US-2016-108966 | 11/10/2016 | 18/10/2016 | Standard Class | SO-20335 | Sean O' |
| 6 | CA-2015-115813 | 08/06/2015 | 14/06/2015 | Standard Class | BU-11710 | Devin |

Data Source
Sheet 1

Connections Add

Sample - Superstore
Microsoft Excel

Sheets 🔍

Use Data Interpreter

Data Interpreter might be able to clean your Microsoft Excel workbook.

- 📊 Orders
- 📊 People
- 📊 Returns
- 📄 Orders
- 📄 People
- 📄 Returns

Sample - Superstore.csv

- ✓ Field names are in first row
Generate field names automatically
- Text File Properties...**
- Convert to Union...
- Duplicate
- Remove

Server: ▼

Quick Connect
[Tableau Online](#)

Sign in to <https://online.tableau.com>



Sign in to Tableau Online

Email address

Password

Remember me [Forgot password](#)

Sign In →

[Sign Up](#)

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MySQL ×

Server: Port:

Enter information to sign in to the server:

Username:

Password:

Require SSL

[Initial SQL...](#)

[Download and install the drivers](#), and then connect.

Microsoft SQL Server

Server:

Database:

Enter information to sign in to the database:

Use Windows Authentication (preferred)

Use a specific username and password

Username:

Password:

Require SSL

Read uncommitted data

[Initial SQL...](#)

Connections [Add](#)

gettingstarter...se.windows.net
Microsoft SQL Server

Database

Select Database ▼

Enter database name

AdventureWorks

master

Database

AdventureWorks

Table

- Address (SalesLT.Address)
- BuildVersion
- Customer (SalesLT.Customer)
- CustomerAdd...merAddress)
- ErrorLog
- Product (SalesLT.Product)
- ProductCateg...uctCategory)
- ProductDescri...tDescription)
- ProductModel...roductModel)
- ProductModel...Description)
- SalesOrderDet...sOrderDetail)
- New Custom SQL

Select Your Google Sheet

Signed in as tristan.guillevin@gmail.com [Sign Out](#)

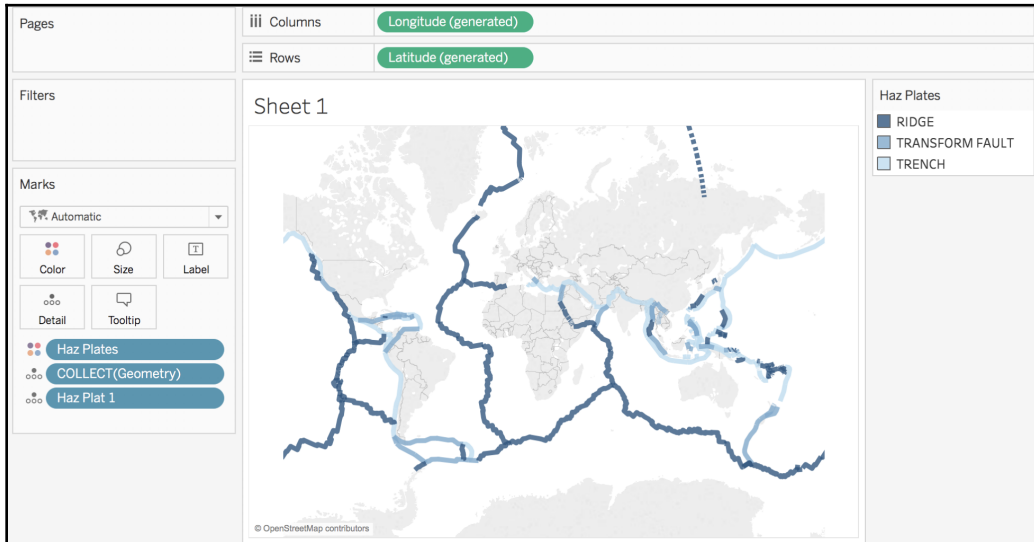
Search by sheet name or enter URL


| Name | Owned by | Last Opened By Me |
|------------------------------------|-------------------|-------------------|
| United Nations in Papua New Guinea | Chloe Tseng | Nov 12, 2017 |
| Refugee and Migrant Children | Chloe Tseng | Nov 3, 2017 |
| CW_user_journey-WRI comments | Chloe Tseng | Nov 3, 2017 |
| US SDG NDC Linkages.xlsx | Chloe Tseng | Nov 3, 2017 |
| Global_land-use_flux-1850_2005.xls | Chloe Tseng | Nov 3, 2017 |
| African Youth Mentorship Network | Chloe Tseng | Oct 16, 2017 |
| Ironviz Answer | Tristan Guillevin | Sep 26, 2017 |
| Stanford University | Chloe Tseng | Sep 20, 2017 |
| Andy Kirk's #VisBookFlipBook | Andy Kirk | Aug 9, 2017 |
| CW_user_journey-WRI comments | Jamie Gibson | Aug 1, 2017 |
| SKO Tent Schools 2017 | Chloe Tseng | Jul 5, 2017 |
| UNICEF Refugee data | Chloe Tseng | Jul 5, 2017 |

United Nations in Papua New Guinea

Last Modified On **Nov 18, 2017**
 Last Modified By **Chloe Tseng**
[Open in Google Drive](#)

KML Files (*.kml)
ESRI Shapefiles (*.shp)
MapInfo Tables (*.tab)
MapInfo Interchange Formats (*.mif)
GeoJSON Files (*.geojson)
TopoJSON Files (*.json *.topojson)



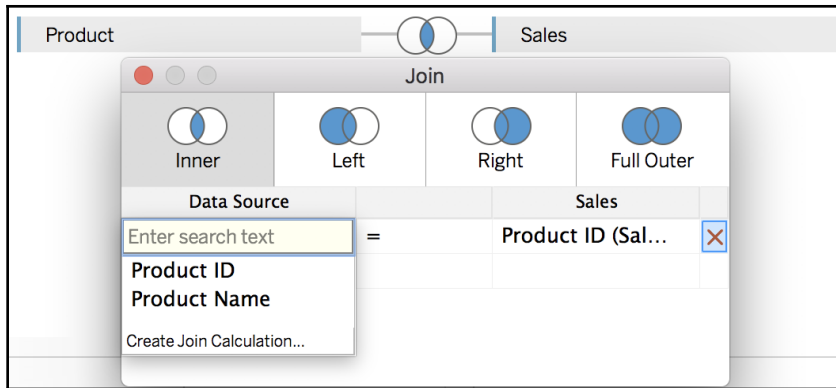
Orders  People

Sort fields: Data source order Show aliases Show hidden

| # Orders Row ID | Abc Orders Order ID | 📅 Orders Order Date | 📅 Orders Ship Date | Abc Orders Ship Mode |
|-----------------------|---------------------------|---------------------------|--------------------------|----------------------------|
| 1 | CA-2017-152156 | 08/11/2017 | 11/11/2017 | Second Class |
| 2 | CA-2017-152156 | 08/11/2017 | 11/11/2017 | Second Class |
| 3 | CA-2017-138688 | 12/06/2017 | 16/06/2017 | Second Class |
| 4 | US-2016-108966 | 11/10/2016 | 18/10/2016 | Standard Class |
| 5 | US-2016-108966 | 11/10/2016 | 18/10/2016 | Standard Class |

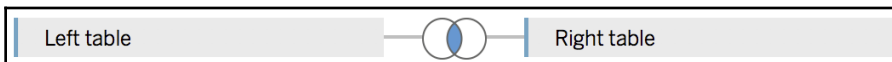
Sort fields: Data source order Show aliases Show hidden fields 1 000 → row

| Product Name | # Orders Sales | # Orders Quantity | # Orders Discount | # Orders Profit | Abc People Person | Abc People Region (People) |
|------------------------|----------------------|-------------------------|-------------------------|-----------------------|-------------------------|----------------------------------|
| Sh Somerset Colle... | 261.96 | 2 | 0.000000 | 41.91 | Cassandra Brandow | South |
| Deluxe Fabric Up... | 731.94 | 3 | 0.000000 | 219.58 | Cassandra Brandow | South |
| f-Adhesive Adres... | 14.62 | 2 | 0.000000 | 6.87 | Anna Andreadi | West |
| tford CR4500 Ser... | 957.58 | 5 | 0.450000 | -383.03 | Cassandra Brandow | South |
| on Fold 'N Roll Car... | 22.37 | 2 | 0.200000 | 2.52 | Cassandra Brandow | South |



| Common column | Value |
|---------------|-------|
| a | 100 |
| b | 200 |
| c | 300 |

| Common column | Info |
|---------------|------|
| b | us |
| c | fr |
| d | es |



| Left Table Value (Left Table) | Left Table Common column | Right table Common column (...) | Right table Info |
|----------------------------------|-----------------------------|------------------------------------|---------------------|
| 200 | b | b | us |
| 300 | c | c | fr |


| Left Table Value (Left Table) | Left Table Common column | Right table Common column (...) | Right table Info |
|----------------------------------|-----------------------------|------------------------------------|---------------------|
| 200 | b | b | us |
| 300 | c | c | fr |
| 100 | a | <i>null</i> | <i>null</i> |

| Left Table Value (Left Table) | Left Table Common column | Right table Common column (...) | Right table Info |
|----------------------------------|-----------------------------|------------------------------------|---------------------|
| 200 | b | b | us |
| 300 | c | c | fr |
| <i>null</i> | <i>null</i> | d | es |

| Left Table Value (Left Table) | Left Table Common column | Right table Common column (...) | Right table Info |
|----------------------------------|-----------------------------|------------------------------------|---------------------|
| 200 | b | b | us |
| 300 | c | c | fr |
| <i>null</i> | <i>null</i> | d | es |
| 100 | a | <i>null</i> | <i>null</i> |

| Product ID | Sales |
|------------|-------|
| 1 | 100 |
| 2 | 100 |
| 3 | 100 |

| Product ID | Product Name |
|------------|--------------|
| 1 | Shield |
| 2 | Bow |
| 3 | Fire arrow |
| 3 | Ice arrow |

Product  Sales

Sort fields A to Z ascending

| # Product Product ID | # Sales Product ID (Sales) | Abc Product Product Name | # Sales Sales |
|----------------------------|----------------------------------|--------------------------------|---------------------|
| 1 | 1 | Shield | 100 |
| 2 | 2 | Bow | 100 |
| 3 | 3 | Fire arrow | 100 |
| 3 | 3 | Ice arrow | 100 |


Connections Add

Sample - Superstore
Microsoft Excel

Sheets

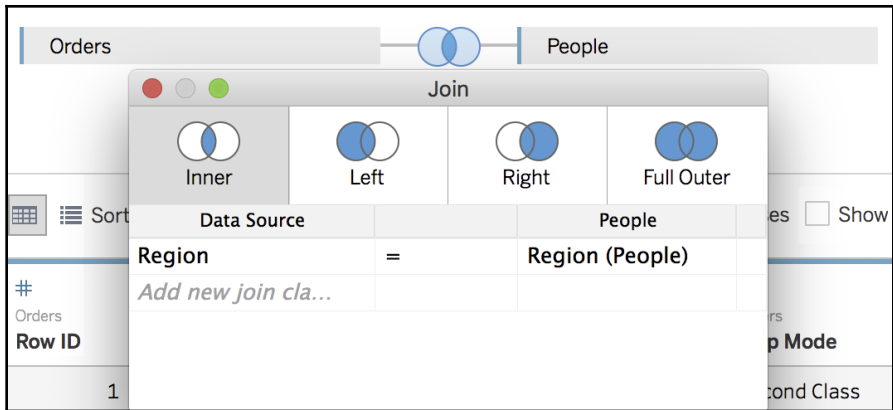
Use Data Interpreter
Data Interpreter might be able to clean your Microsoft Excel workbook.

Orders
People
Returns
Orders
People
Returns

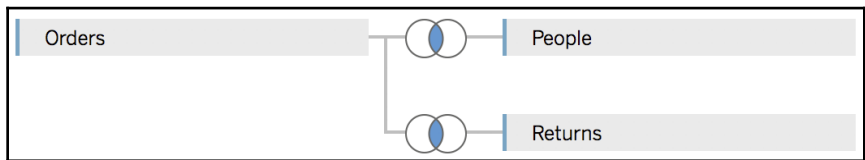
Orders  People

Sort fields Data source order Show aliases Show

| # Orders Row ID | Abc Orders Order ID | Orders Order Date | Orders Ship Date | Abc Orders Ship Mode |
|-----------------------|---------------------------|----------------------|---------------------|----------------------------|
| 1 | CA-2017-152156 | 08/11/2017 | 11/11/2017 | Second Class |
| 2 | CA-2017-152156 | 08/11/2017 | 11/11/2017 | Second Class |
| 3 | CA-2017-138688 | 12/06/2017 | 16/06/2017 | Second Class |

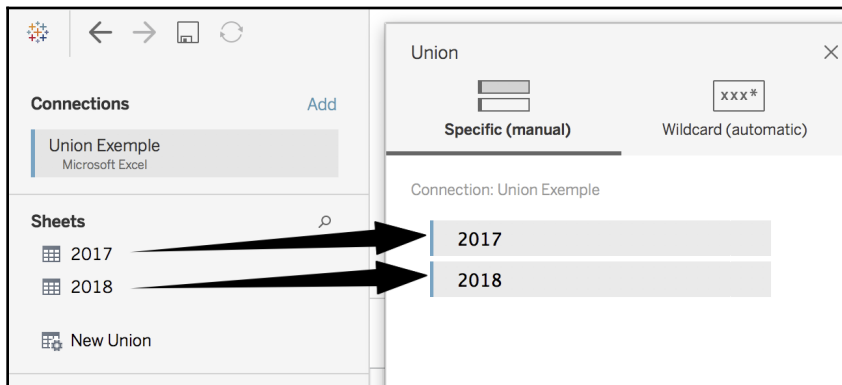
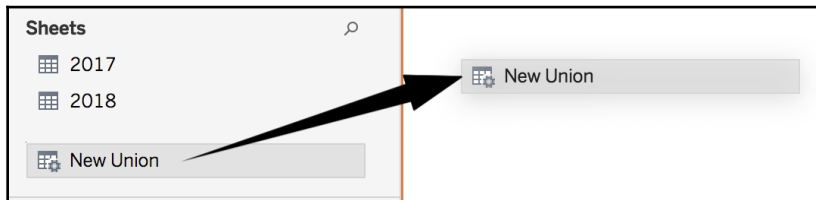
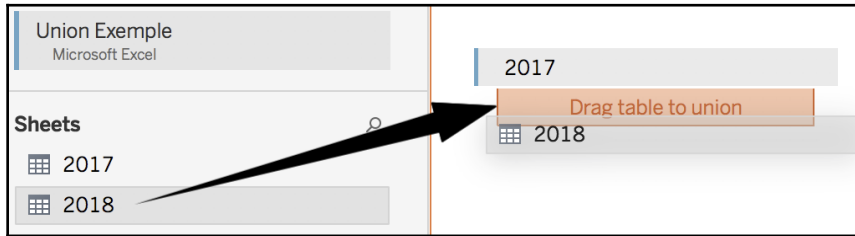


| # Orders Discount | # Orders Profit | Abc People Person | Abc People Region (People) |
|--------------------------------|------------------------------|--------------------------------|---|
| 0.000000 | 41.91 | Cassandra Brandow | South |
| 0.000000 | 219.58 | Cassandra Brandow | South |
| 0.000000 | 6.87 | Anna Andreadi | West |
| 0.450000 | -383.03 | Cassandra Brandow | South |
| 0.200000 | 2.52 | Cassandra Brandow | South |
| 0.000000 | 14.17 | Anna Andreadi | West |



| Value | Country |
|-------|---------------|
| 310 | United States |
| 120 | France |
| 100 | Spain |

| Value | Country |
|-------|---------------|
| 130 | United States |
| 60 | France |
| 940 | Spain |



| Union Value | Union Country | Union Sheet | Union Table Name |
|-------------|---------------|-------------|------------------|
| 310 | United States | 2017 | 2017 |
| 120 | France | 2017 | 2017 |
| 100 | Spain | 2017 | 2017 |
| 130 | United States | 2018 | 2018 |
| 60 | France | 2018 | 2018 |
| 940 | Spain | 2018 | 2018 |

| Country and City | Year | | | |
|----------------------|-------|-------|-------|-------|
| | 2015 | 2016 | 2017 | 2018 |
| Kenya/Nairobi | 74271 | 13190 | 40746 | 22826 |
| Brazil/Rio | 52579 | 17388 | 30067 | 1849 |
| United States/Denver | 21691 | 7765 | 44720 | 3394 |
| Germany/Berlin | 47946 | 43622 | 19961 | 2537 |
| Japan/Tokyo | 5072 | 49598 | 29861 | 33979 |
| Finland/Helsinki | 59153 | 80023 | 61742 | 65594 |
| Russia/Moscow | 22697 | 38769 | 21267 | 12695 |
| Norway/Oslo | 61135 | 20984 | 42127 | 28246 |

Connections Add

Dataset to clean
Microsoft Excel

Sheets +

Use Data Interpreter
Data Interpreter might be able to clean your Microsoft Excel workbook.

Sales

New Union

Sales (Dataset to clean)

Sales

Sort fields: Data source order

| Abc Sales F1 | # Sales Year | # Sales F3 | # Sales F4 | # Sales F5 |
|--------------------|--------------------|------------------|------------------|------------------|
| Country and City | 2,015 | 2,016 | 2,017 | 2,018 |
| Kenya/Nairobi | 74,271 | 13,190 | 40,746 | 22,826 |

Connections Add

Dataset to clean
Microsoft Excel

Sheets 🔍

Cleaned with Data Interpreter
[Review the results.](#) (To undo changes, clear the check box.)

Sales

New Union

Sort fields Data source order

| Country and City | Year 2015 | Year 2016 | Year 2017 | Year 2018 |
|----------------------|-----------|-----------|-----------|-----------|
| Kenya/Nairobi | 74,271 | 13,190 | 40,746 | 22,826 |
| Brazil/Rio | 52,579 | 17,388 | 30,067 | 1,849 |
| United States/Denver | 21,691 | 7,765 | 44,720 | 3,394 |
| Germany/Berlin | 47,946 | 43,622 | 19,961 | 2,537 |
| Japan/Tokyo | 5,072 | 49,598 | 29,861 | 33,979 |

| Country and City | Year 2015 | Year 2016 |
|----------------------|-----------|-----------|
| Kenya/Nairobi | 74,271 | 13,190 |
| Brazil/Rio | 52,579 | 17,388 |
| United States/Denver | 21,691 | 7,765 |
| Germany/Berlin | 47,946 | 43,622 |
| Japan/Tokyo | 5,072 | 49,598 |
| Finland/Helsinki | 15,221 | 15,221 |
| Russia/Moscow | 15,221 | 15,221 |
| Norway/Oslo | 15,221 | 15,221 |

- Rename
- Copy Values
- Hide
- Delete
- Aliases...
- Create Calculated Field...
- Create Group
- Split**
- Custom Split...
- Pivot (select multiple fields)
- Describe...

| 🌐 Sales Country and City | =🌐 Calculation Country | =🌐 Calculation City |
|---------------------------------------|-------------------------------------|----------------------------------|
| Kenya/Nairobi | Kenya | Nairobi |
| Brazil/Rio | Brazil | Rio |
| United States/Denver | United States | Denver |
| Germany/Berlin | Germany | Berlin |
| Japan/Tokyo | Japan | Tokyo |

Custom Split






How should this data be split?

Use the separator

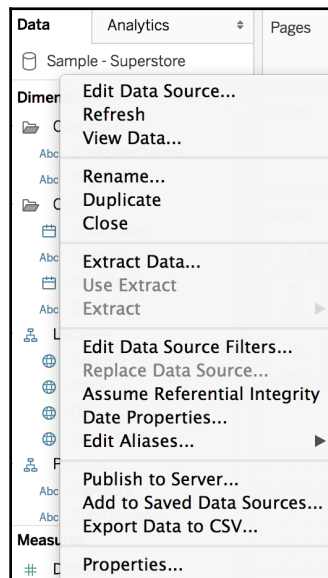
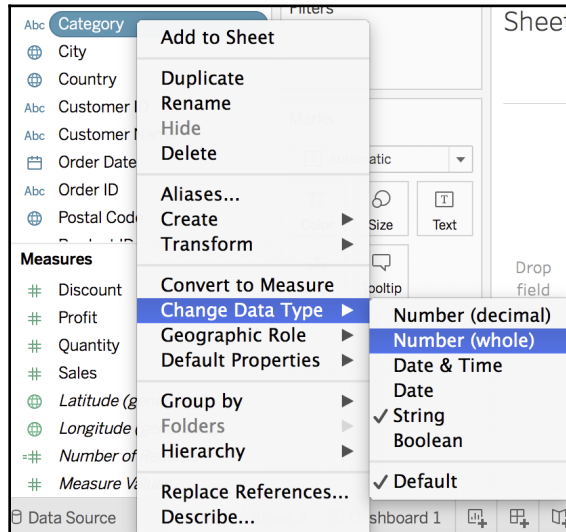
Split off First columns

| # Sales Year 2015 | # Sales Year 2016 | # Sales Year 2017 | # Sales Year 2018 |
|--------------------------------|--------------------------------|--------------------------------|--------------------------------|
| 74,271 | 13,190 | 40,746 | |
| 52,579 | 17,388 | 30,067 | |
| 21,691 | 7,765 | 44,720 | |
| 47,946 | 43,622 | 19,961 | |
| 5,072 | 49,598 | 29,861 | |

- Rename
- Copy Values
- Hide
- Create Calculated Field...
- Pivot
- Merge Mismatched Fields

|  Pivot Year |  Pivot Value |  Sales Country and City |  Calculation Country |  Calculation City |
|---|--|---|--|---|
| Year 2015 | 74,271 | Kenya/Nairobi | Kenya | Nairobi |
| Year 2015 | 52,579 | Brazil/Rio | Brazil | Rio |
| Year 2015 | 21,691 | United States/Denver | United States | Denver |
| Year 2015 | 47,946 | Germany/Berlin | Germany | Berlin |
| Year 2015 | 5,072 | Japan/Tokyo | Japan | Tokyo |
| Year 2015 | 59,153 | Finland/Helsinki | Finland | Helsinki |
| Year 2015 | 22,697 | Russia/Moscow | Russia | Moscow |

Chapter 5: Build an Efficient Data Source



View Data: Datasource

9 994 rows Show aliases Copy Export All

| Category | City | Country | Customer ID | Customer Name | New Region | Order Date |
|-----------------|-----------------|---------------|-------------|-----------------|------------|------------|
| Furniture | Henderson | United States | CG-12520 | Claire Gute | South | 08/11/2017 |
| Furniture | Henderson | United States | CG-12520 | Claire Gute | South | 08/11/2017 |
| Office Supplies | Los Angeles | United States | DV-13045 | Darrin Van Huff | West | 12/06/2017 |
| Furniture | Fort Lauderdale | United States | SO-20335 | Sean O'Donnell | South | 11/10/2016 |
| Office Supplies | Fort Lauderdale | United States | SO-20335 | Sean O'Donnell | South | 11/10/2016 |
| Furniture | Los Angeles | United States | BH-11710 | Brosina Hoffman | West | 09/06/2015 |
| Office Supplies | Los Angeles | United States | BH-11710 | Brosina Hoffman | West | 09/06/2015 |
| Technology | Los Angeles | United States | BH-11710 | Brosina Hoffman | West | 09/06/2015 |
| Office Supplies | Los Angeles | United States | BH-11710 | Brosina Hoffman | West | 09/06/2015 |
| Office Supplies | Los Angeles | United States | BH-11710 | Brosina Hoffman | West | 09/06/2015 |
| Furniture | Los Angeles | United States | BH-11710 | Brosina Hoffman | West | 09/06/2015 |
| Technology | Los Angeles | United States | BH-11710 | Brosina Hoffman | West | 09/06/2015 |
| Office Supplies | Concord | United States | AA-10480 | Andrew Allen | South | 15/04/2018 |
| Office Supplies | Seattle | United States | IM-15070 | Irene Maddox | West | 05/12/2017 |
| Office Supplies | Fort Worth | United States | HP-14815 | Harold Pawlan | Central | 22/11/2016 |
| Office Supplies | Fort Worth | United States | HP-14815 | Harold Pawlan | Central | 22/11/2016 |
| Office Supplies | Madison | United States | PK-19075 | Pete Kriz | Central | 11/11/2015 |
| Office Supplies | West Jordan | United States | AG-10270 | Alejandro Grove | West | 13/05/2015 |

Datasource

Dimensions

- Abc Region
- # Row ID
- Abc Segment
- Ship Date
- Abc Ship Mode
- State
- Abc Sub-Category
- Abc Measure Name

Measures

- # Discount

Edit Data Source...
 Refresh
 View Data...
 Rename...
 Duplicate
 Close
 Extract Data...
 Use Extract
 Extract ▶ Refresh
 Edit Data Source Filters...
 Replace Data Source...
 Date Properties...
 Append Data from File...
 Compute Calculations Now

| Rows | | Region |
|---------|--|--------|
| Sheet 1 | | |
| Region | | |
| Central | | Abc |
| East | | Abc |
| South | | Abc |
| West | | Abc |

| | | |
|--|---------------------------------------|---|
| Datasource Dimensions Abc Customer Name Abc New Region Order Date Abc Order ID Postal Code Abc Product ID Abc Product Name Abc Region # Row ID | Filters | Rows Region |
| | Marks Automatic Color Size Text | Sheet 1 Region Central Abc East Abc South Abc West Abc |

| | |
|--|------------------------------|
| Datasource Dimensions Abc Customer Name Abc New Region Order Date Abc Order ID Postal Code Abc Product ID Abc Product Name Abc Region # Row ID Abc Segment | Delete |
| | Aliases... |
| | Create |
| | Convert to Measure |
| | Geographic Role |
| | Default Properties |
| | Group by |
| | Folders |
| | Hierarchy |
| | Replace References... |
| Describe... | |

| Rows | | New Region |
|------------|-----|------------|
| Sheet 1 | | |
| New Region | | |
| Central | Abc | |
| East | Abc | |
| South | Abc | |
| West | Abc | |

- Add to Sheet
- Show Filter (Ctrl)

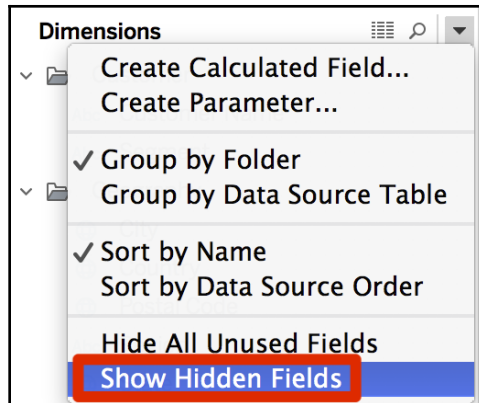
- Duplicate (Ctrl)
- Rename
- Hide (Ctrl)
- Delete

- Create ▶
- Transform ▶

- Convert to Discrete
- Convert to Dimension
- Change Data Type ▶
- Geographic Role ▶
- Default Properties ▶

- Group by ▶
- Folders ▶
- Hierarchy ▶

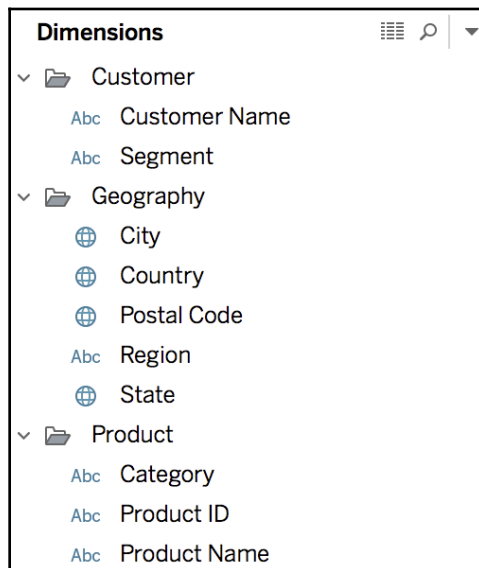
- Replace References...
- Describe...



| Member | Has Alias | Value (Alias) |
|----------------|-----------|----------------|
| First Class | * | First |
| Same Day | * | Express |
| Second Class | * | Business Class |
| Standard Class | * | Standard |

Buttons: OK, Cancel, Clear Aliases

Abc Customer ID (Count (Distinct))



📅 Ship Date
Abc **Ship Mode** ▾
🌐 State Ship mode selected by the client
Abc Sub-Categor Our **Prime** members have **Business** by default

☰ Detail 💬 Tooltip

Select Data Item:
 First Class
 Same Day
 Second Class
 Standard Class

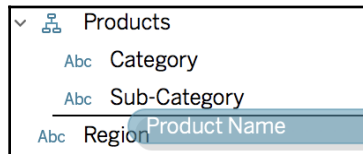
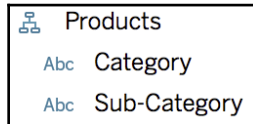
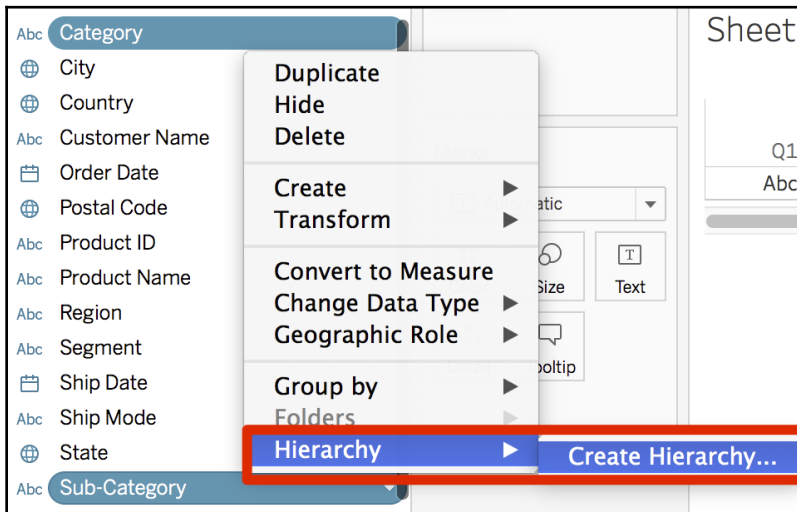
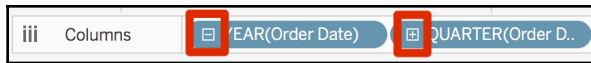
Select Color Palette:
▬▬▬ Seattle Grays ▾

Automatic
 Number (Standard)
Number (Custom)
 Currency (Standard)
 Currency (Custom)
 Scientific
 Percentage
 Custom

Number (Custom)
 Decimal places:
 2 ▾
 Negative values:
 -1234 ▾
 Display Units:
 None ▾
 Prefix / Suffix:

 Include thousands separators

☰ Columns + **YEAR(Order Date)**



| Category | Count |
|-----------------|---------|
| Furniture | 18,451 |
| Office Supplies | 122,491 |
| Technology | 145,455 |

Rows Category Sub-Category

Sheet 1

| Category | Sub-Category | |
|-----------------|--------------|---------|
| Furniture | Bookcases | -3,473 |
| | Chairs | 26,590 |
| | Furnishings | 13,059 |
| | Tables | -17,725 |
| Office Supplies | Appliances | 18,138 |
| | Art | 6,528 |
| | Binders | 30,222 |
| | Envelopes | 6,964 |
| | Fasteners | 950 |
| | Labels | 5,546 |
| | Paper | 34,054 |
| | | |

Field Name: Sub-Category (group)

Groups: Add to:

- Bookcases
- Chairs **Group**
- Copiers
- Envelopes
- Fasteners
- Furnishings
- Labels
- Machines
- Paper
- Phones
- Storage
- Supplies
- Tables

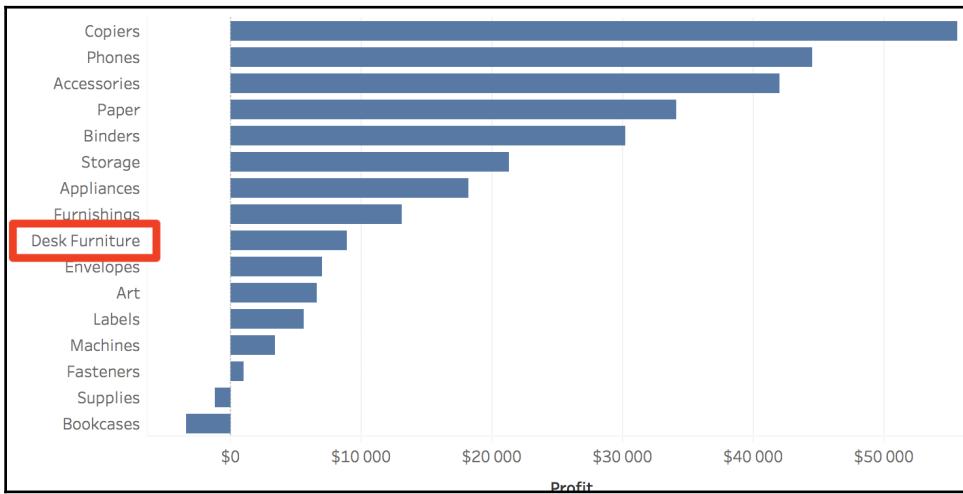
Group Rename Ungroup Show Add Location

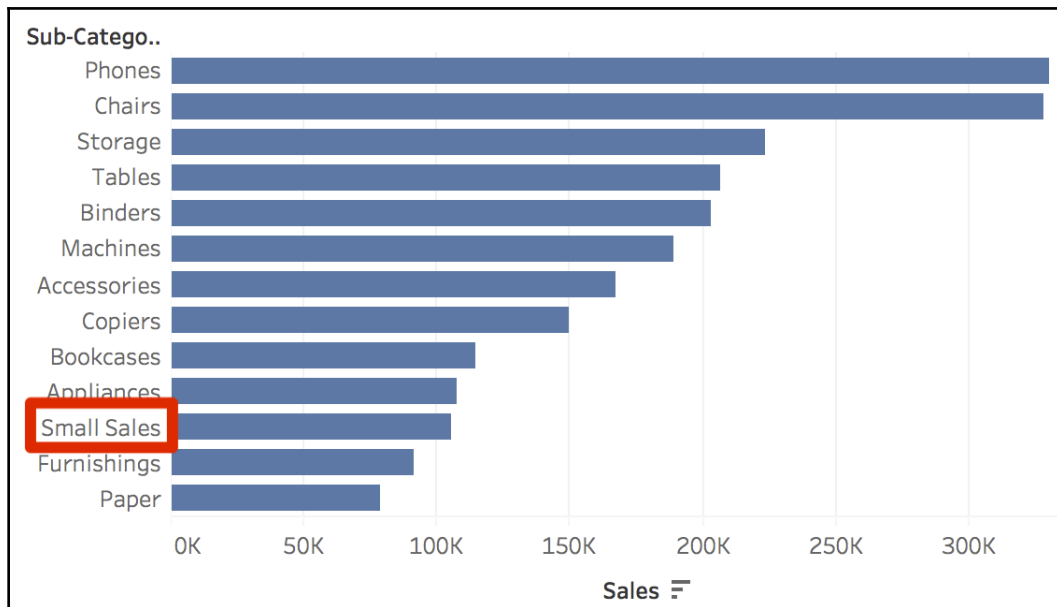
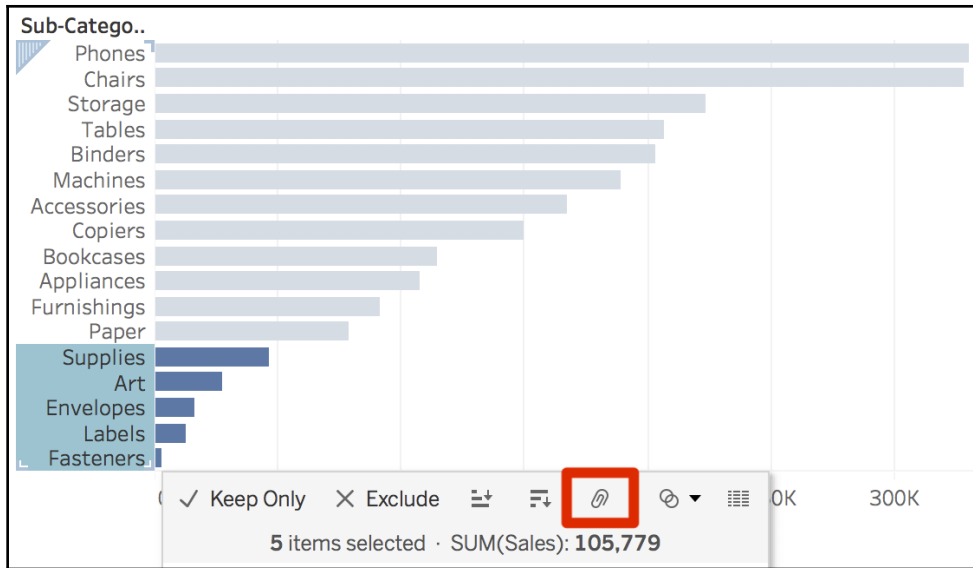
Include 'Other' Find >>

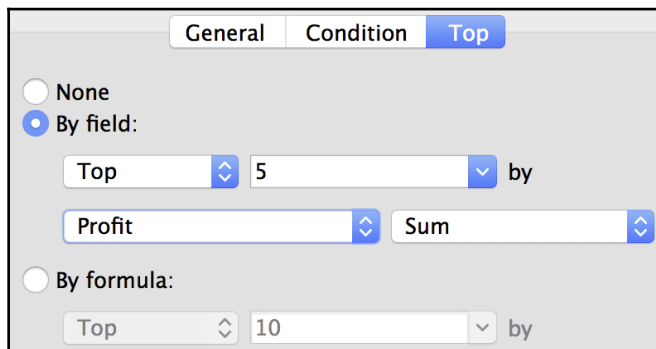
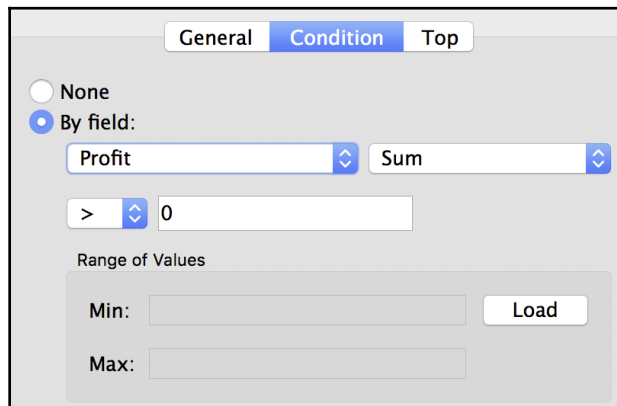
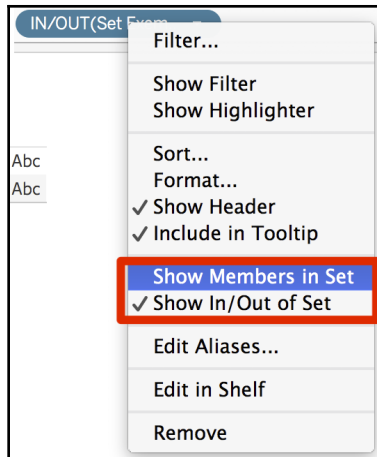
Reset Apply Cancel OK

Dimensions

- Abc Product Name
- Abc Region
- # Row ID
- Abc Segment
- 📅 Ship Date
- Abc Ship Mode
- 🌐 State
- Abc Sub-Category
- 📎 Sub-Category (group)**
- Abc Measure Names







Dimensions

- Order Date
- Postal Code
- Product ID
- Product Name
- Region
- Segment
- Ship Date
- Ship Mode
- State
- Sub-Category
- Sub-Category (group)

Measures

- Discount
- Profit
- Quantity

Sets

- Top 5 State by Profit

Filters

Marks

Automatic

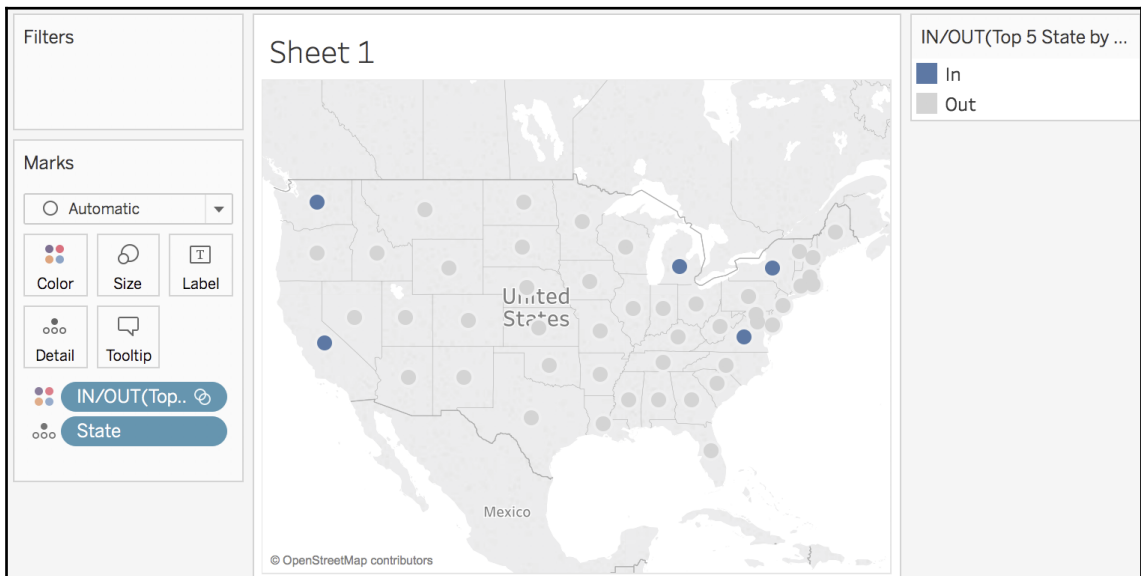
Color Size Label

Detail Tooltip

IN/OUT(Top 5 State by Profit)

IN/OUT(Top..)

State



New field name:

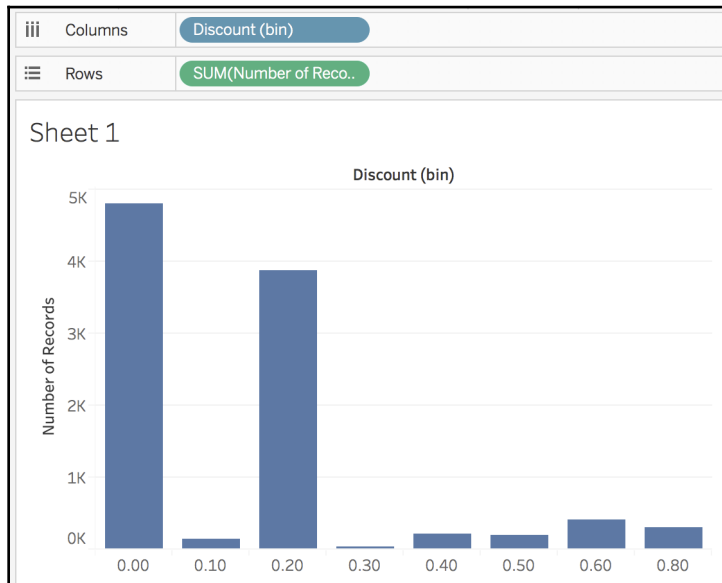
Size of bins:

Range of Values:

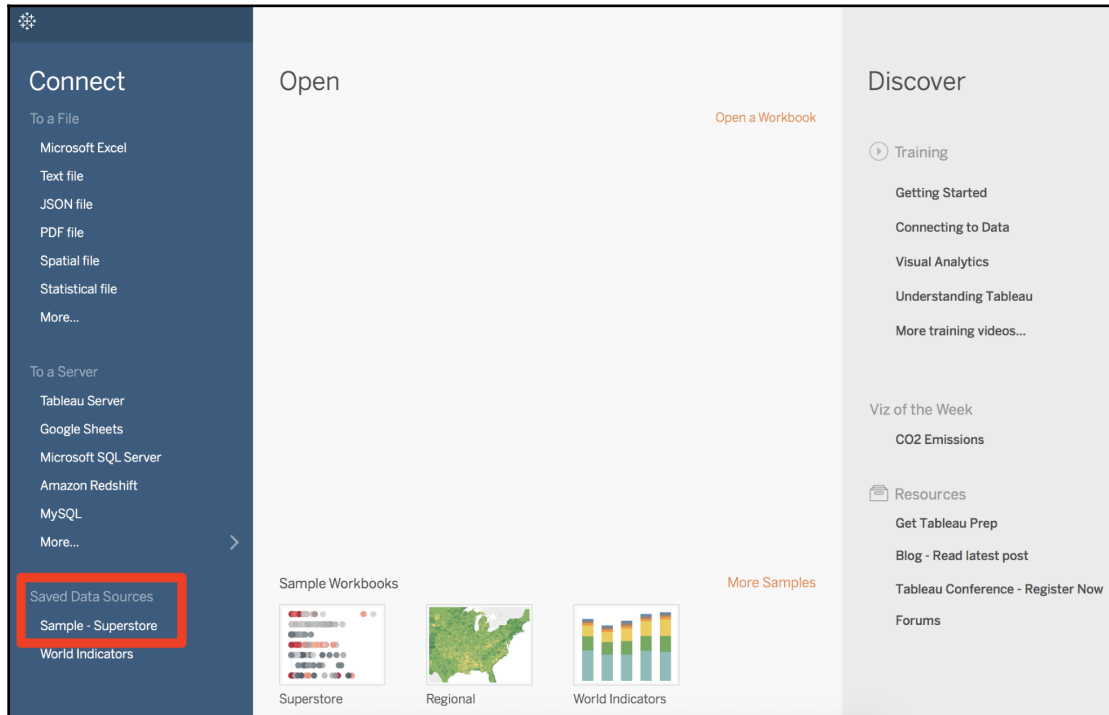
Min: Diff:

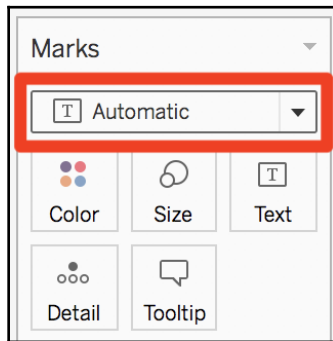
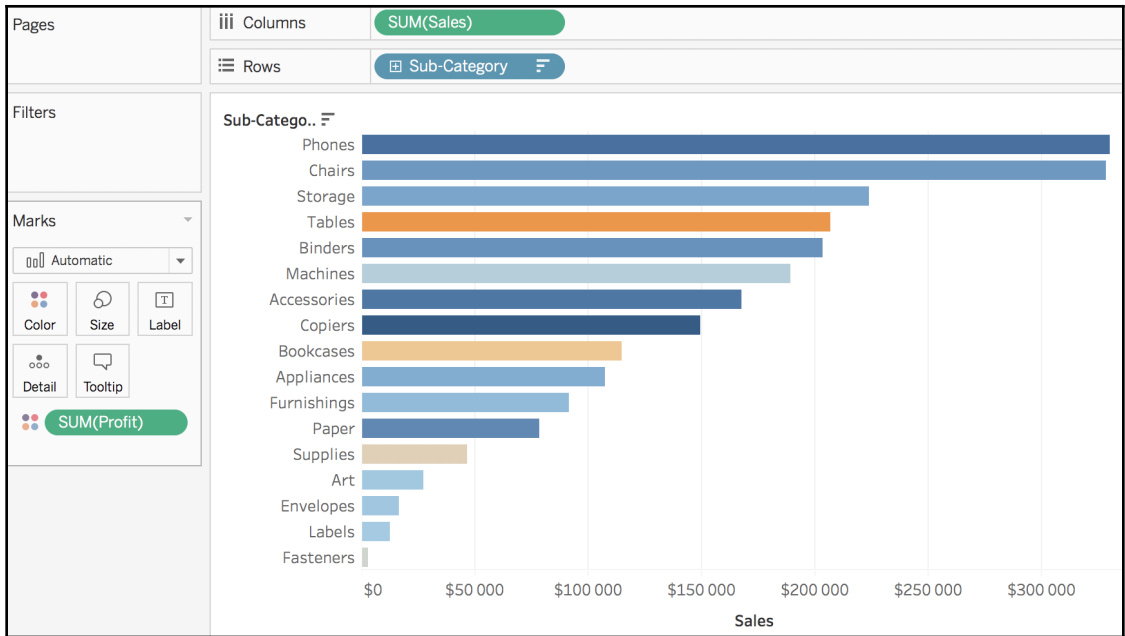
Max: CntD:













- Dimensions**
- Category
 - City
 - Country
 - Customer Name
 - Discount (bin)

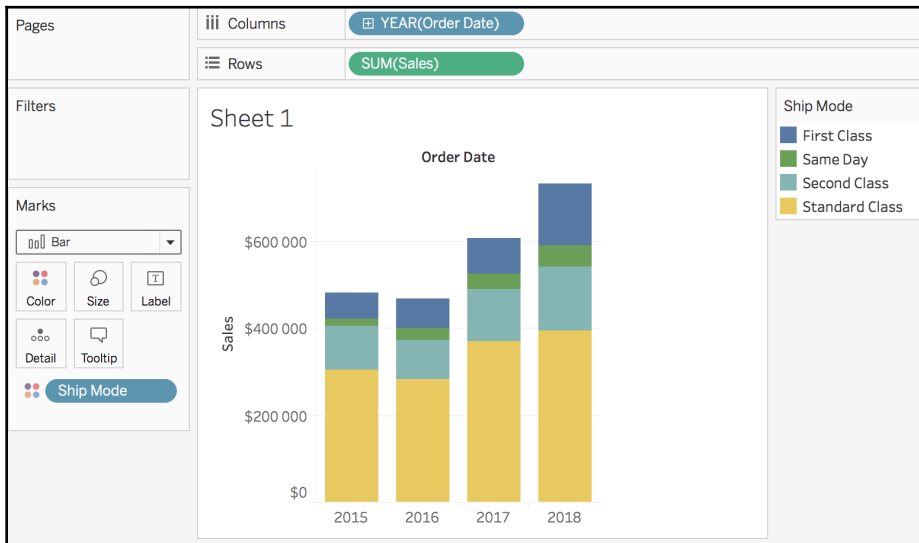


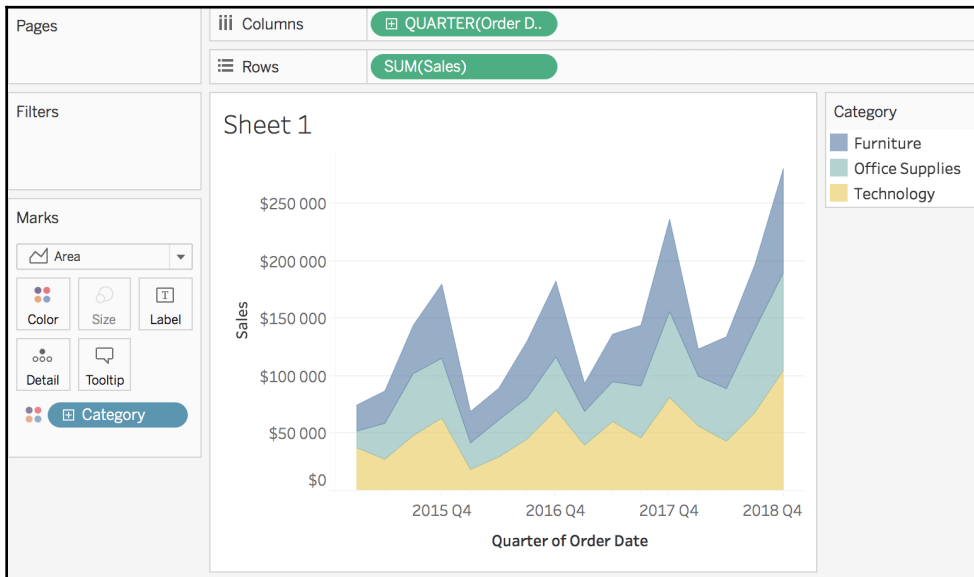
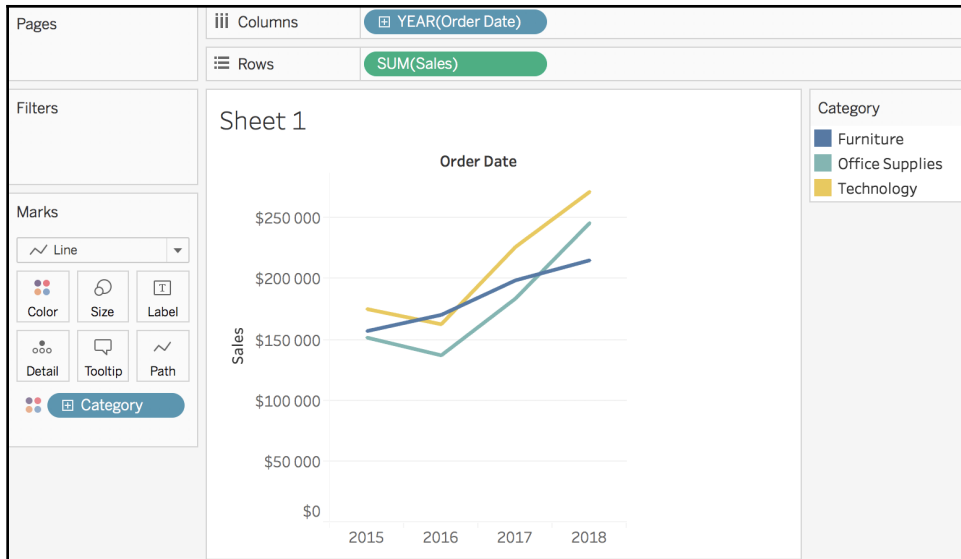
Chapter 6: Design Insightful Visualizations - Part 1

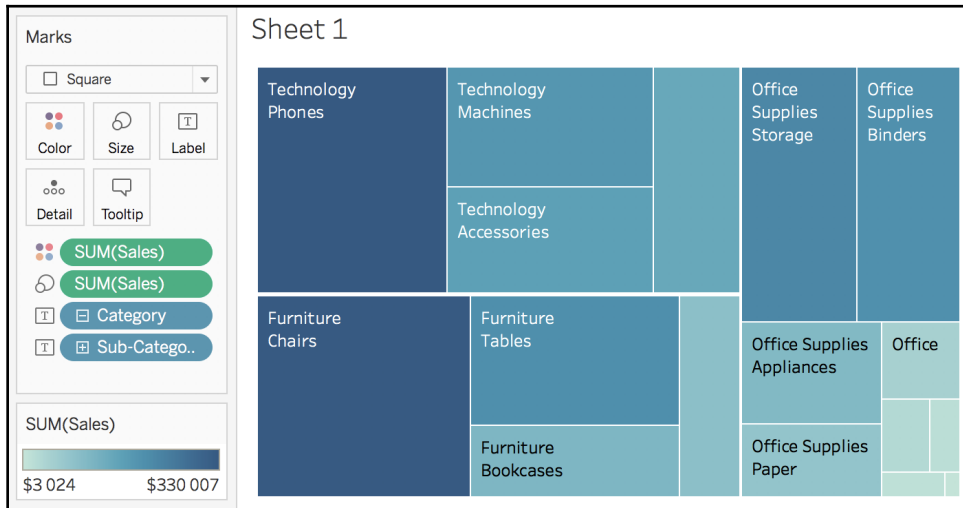
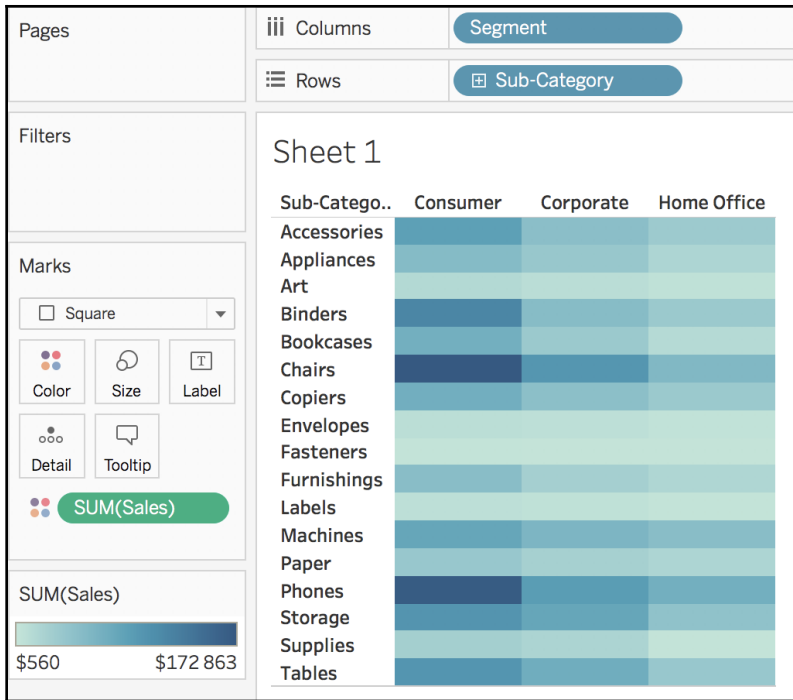


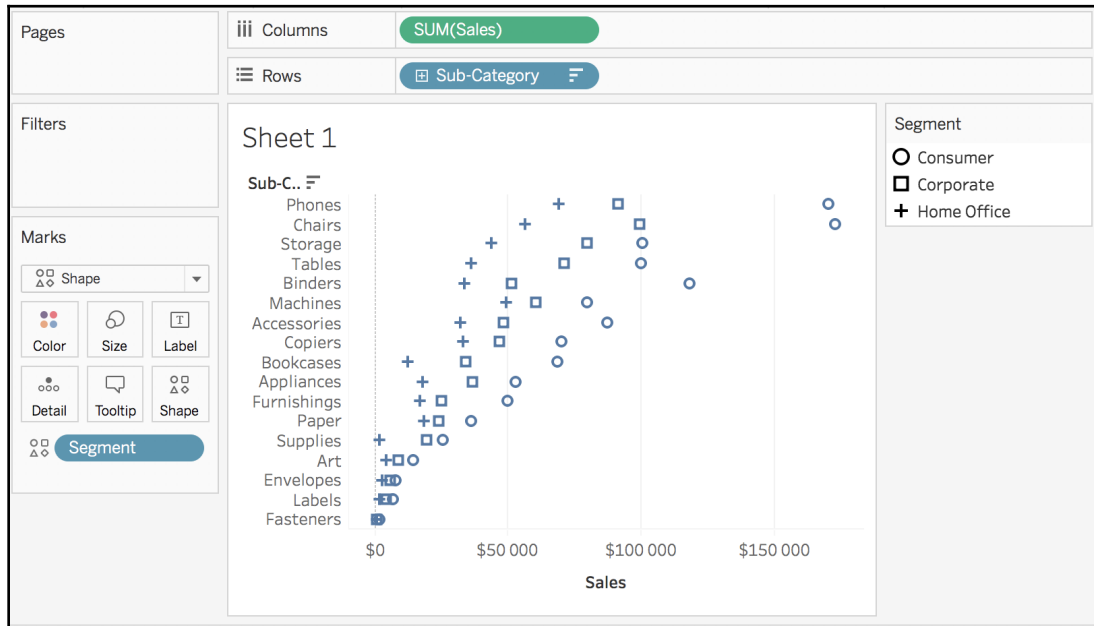
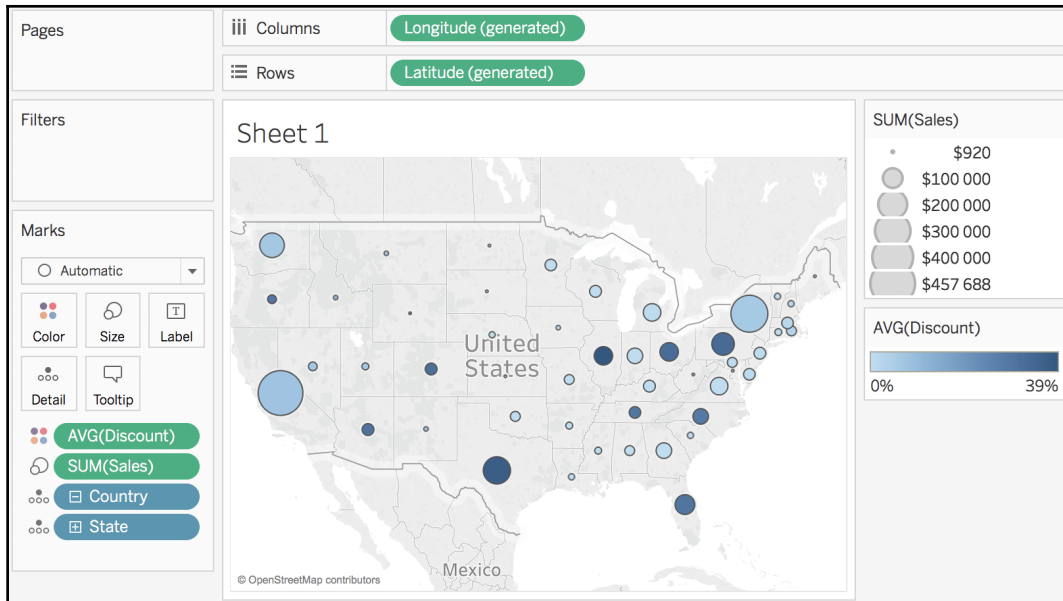


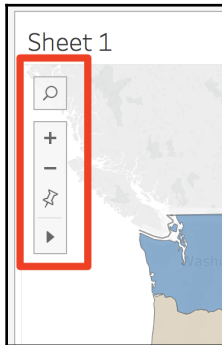
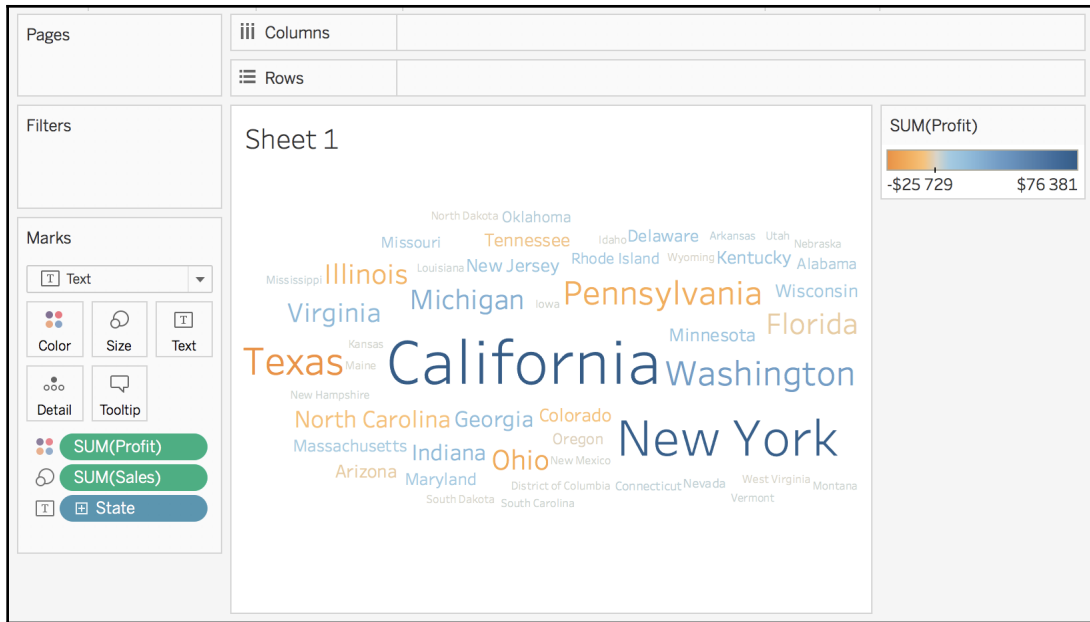
-  Automatic
-  Bar
-  Line
-  Area
-  Square
-  Circle
-  Shape
-  Text
-  Map
-  Pie
-  Gantt Bar
-  Polygon
-  Density

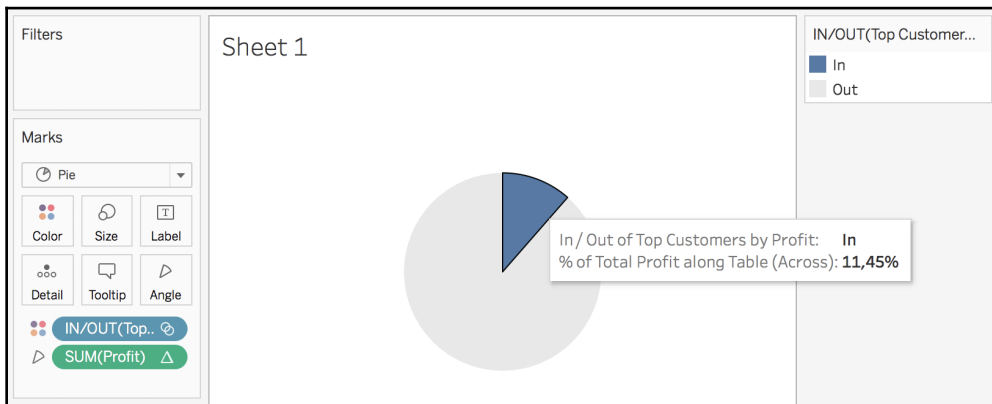
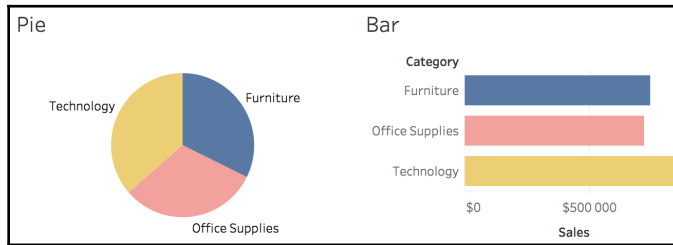
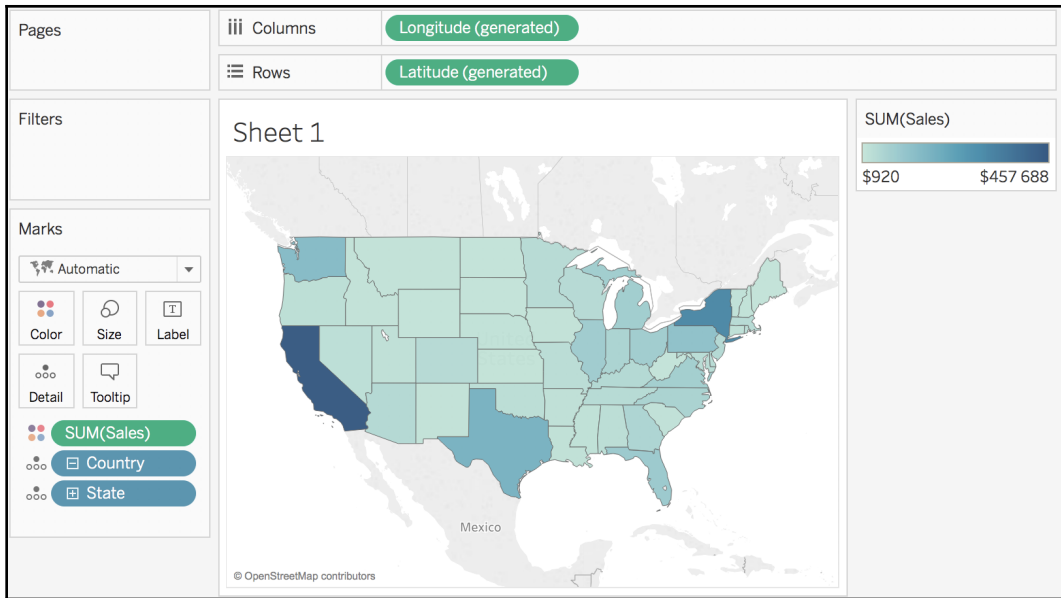


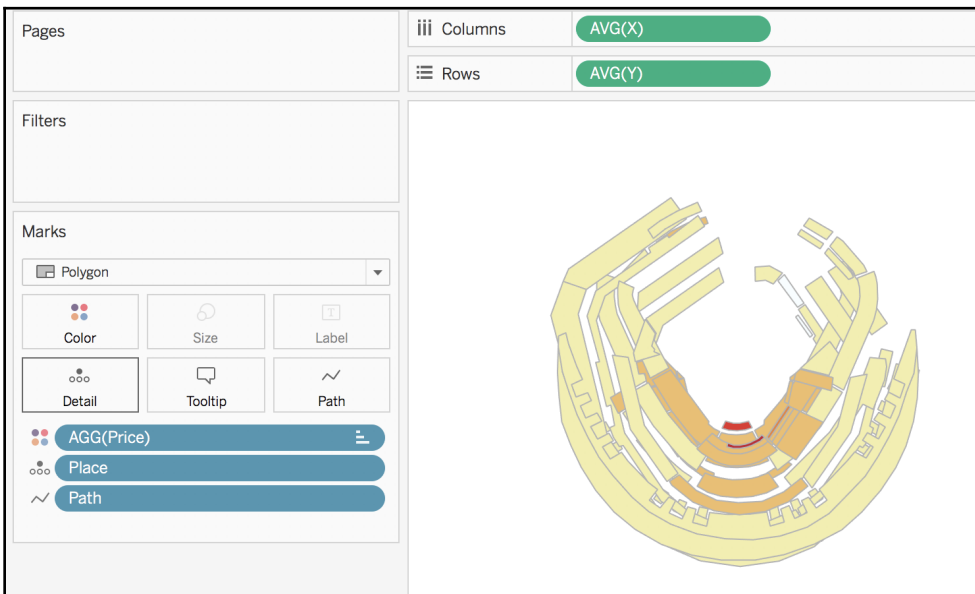
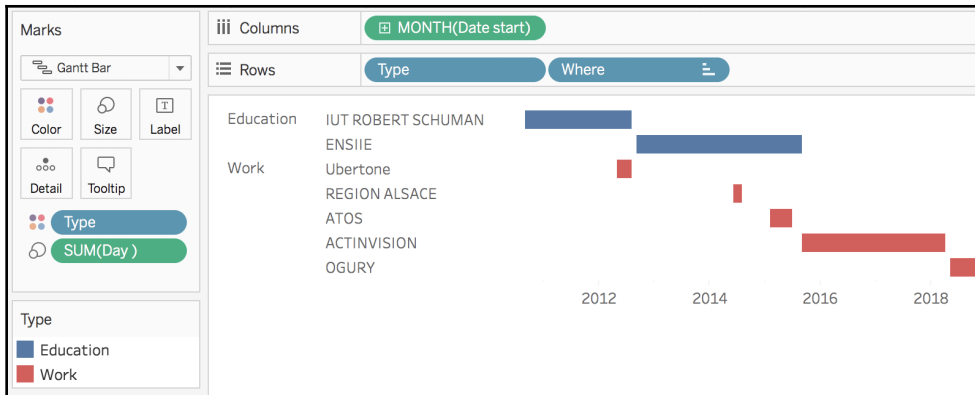


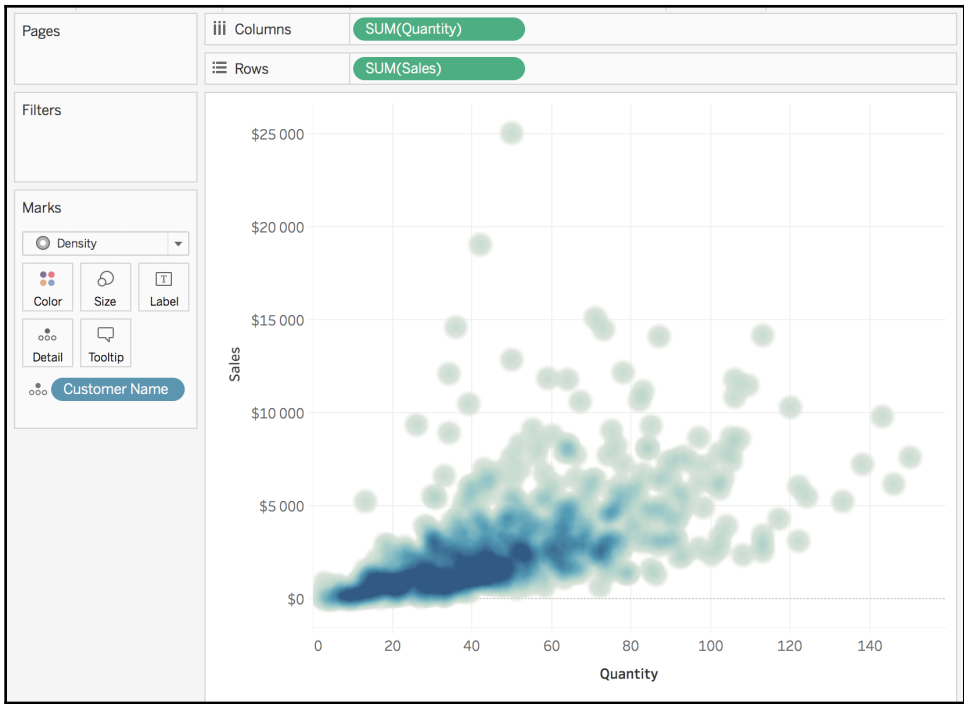


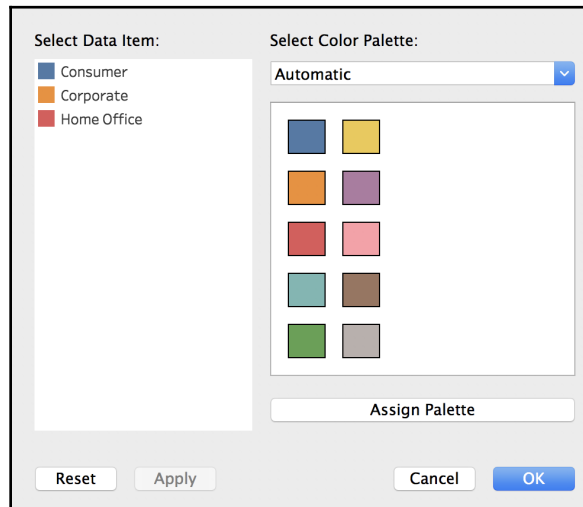
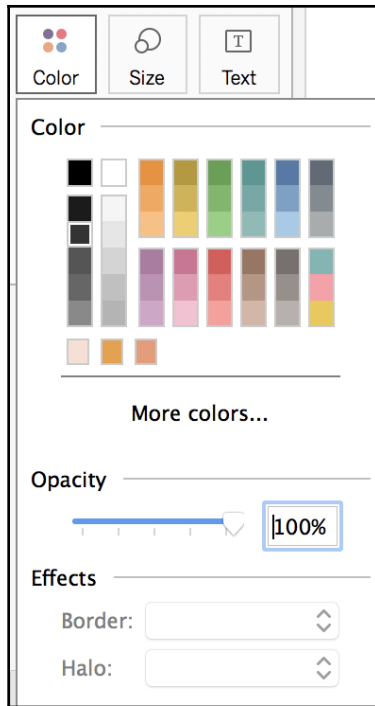


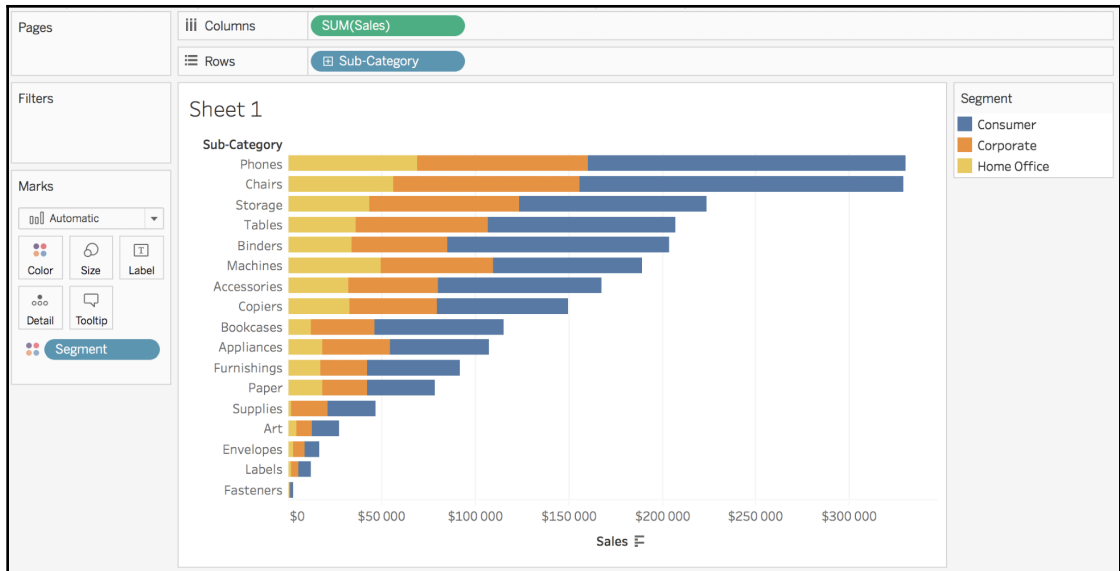












Palette: Automatic

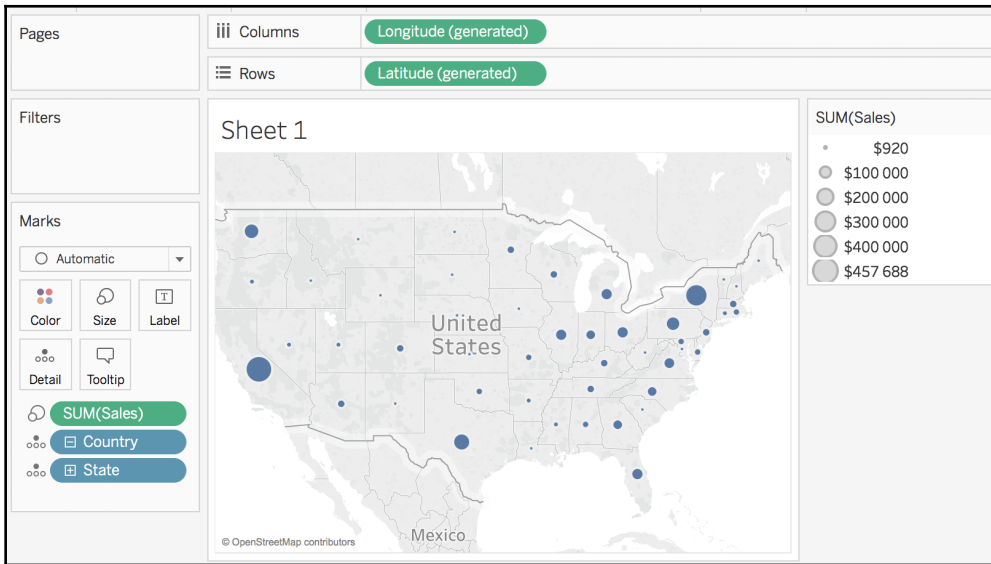
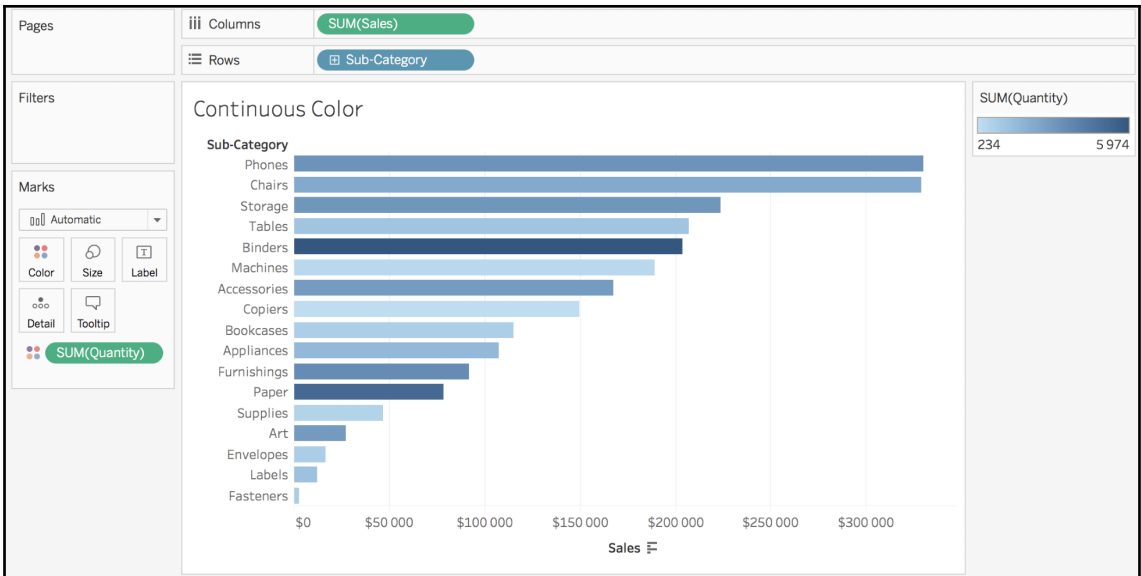
-\$17 725 \$55 618

Stepped Color 5 Steps
 Reversed
 Use Full Color Range
 Include Totals << Advanced

Start: End:
 -\$17 725,4811 \$55 617,8249

Center:
 0

Reset Apply Cancel OK



Sample legend:

- \$920
- \$100 000
- \$200 000
- \$300 000
- \$400 000
- \$457 688

Sizes vary: Automatically

Mark size range:

Smallest Largest

Reversed

Start value for range: 919,91

End value for range: 457 687,6315

Reset Apply Cancel OK

Filters

Sheet 1

The global sales in our company are

\$2 297 201

For 37 873 products sold

Text: The global sales

Alignment: Center

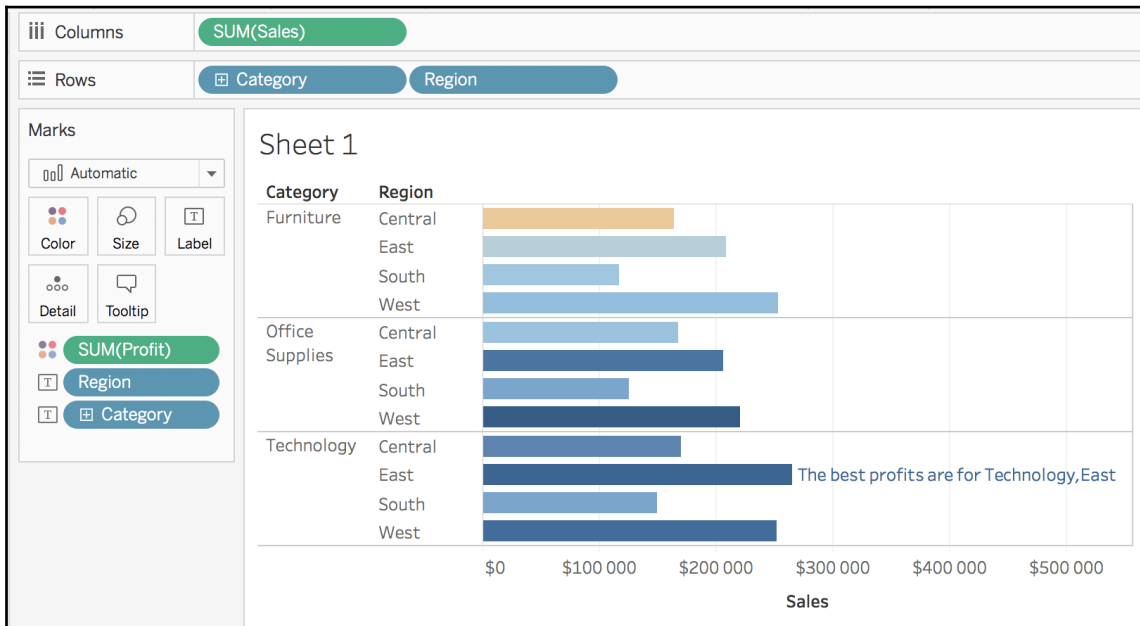
Edit Label

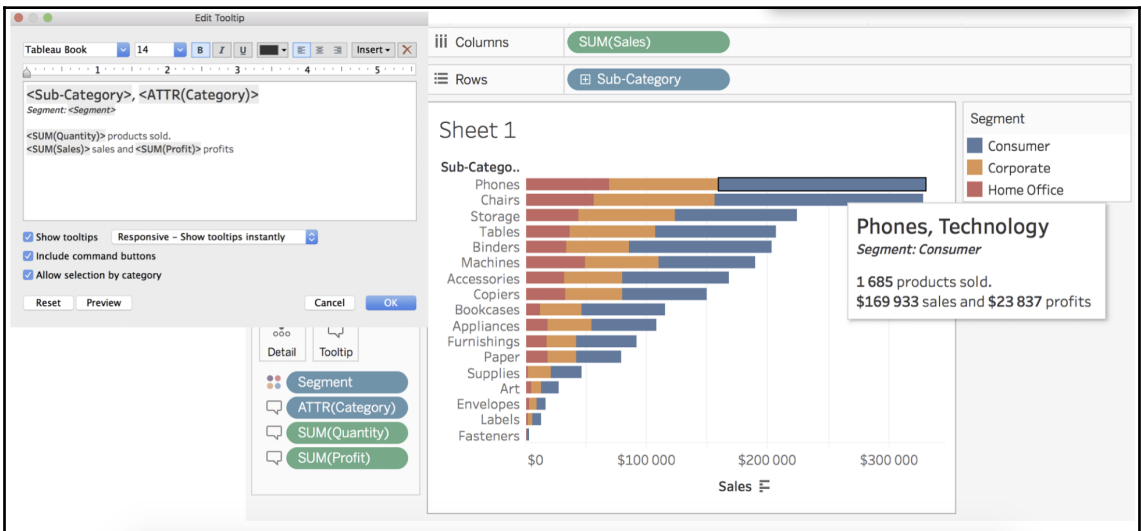
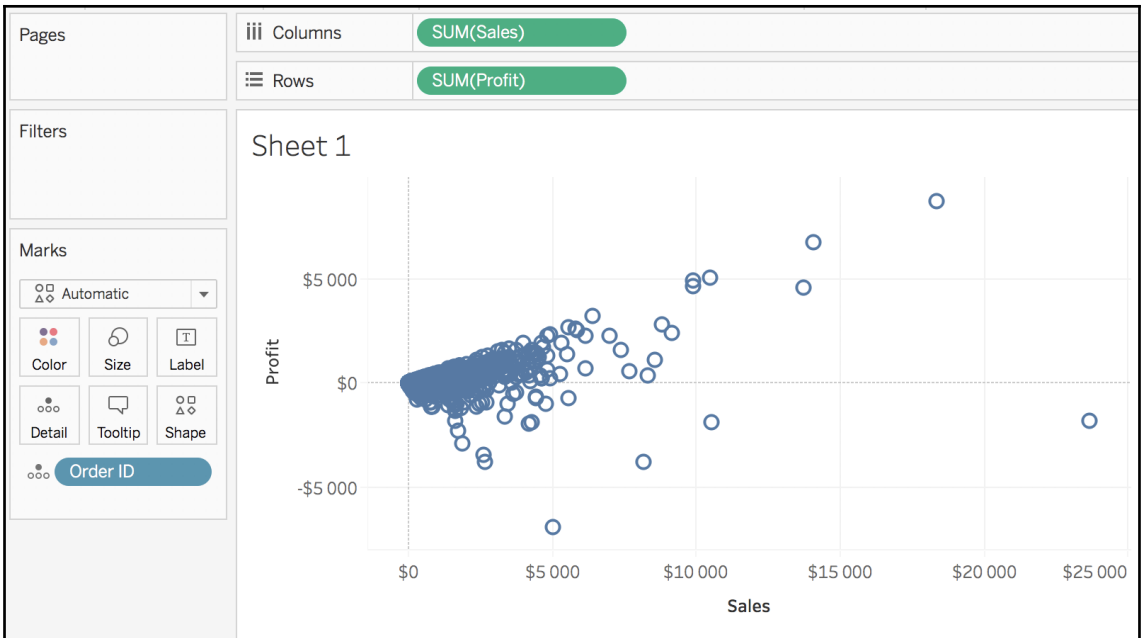
Tableau Light 12

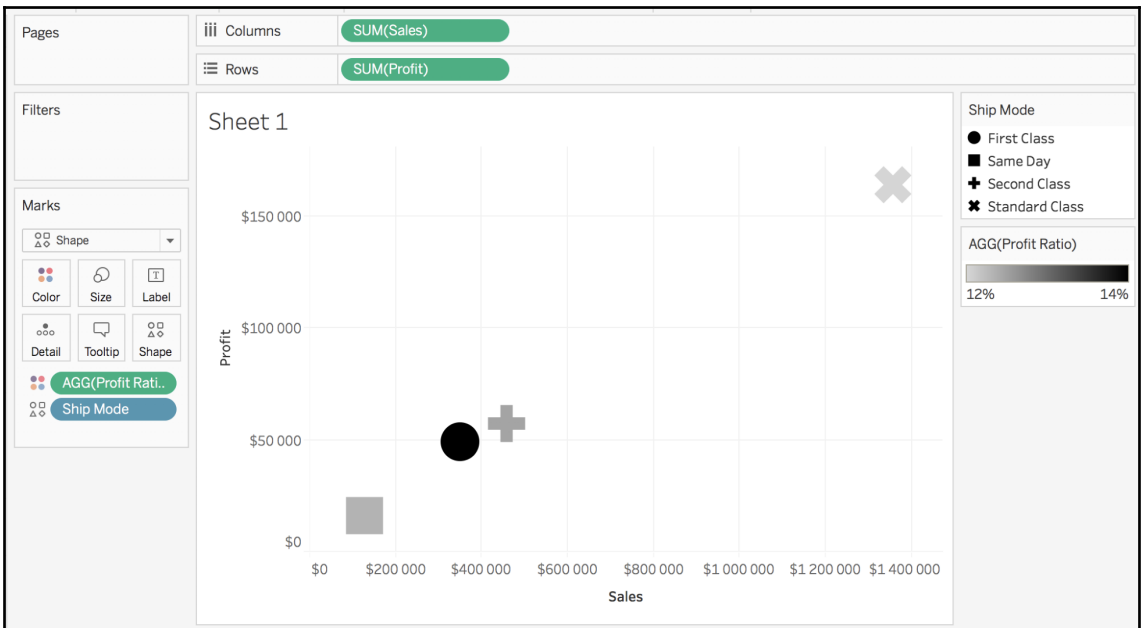
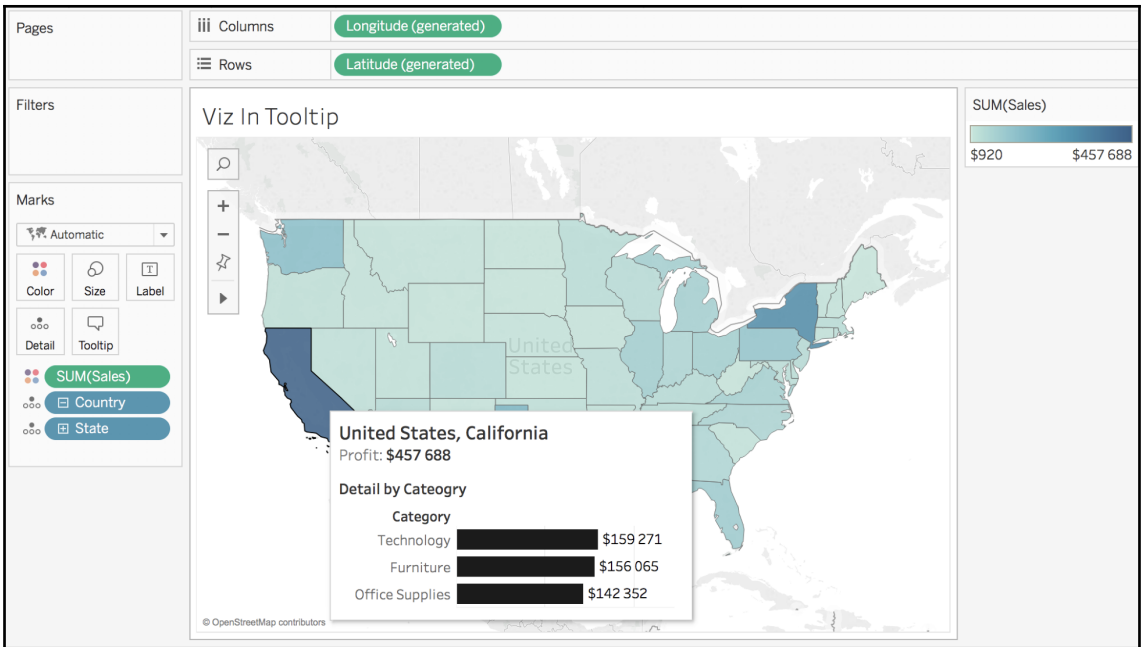
The global sales in our company are

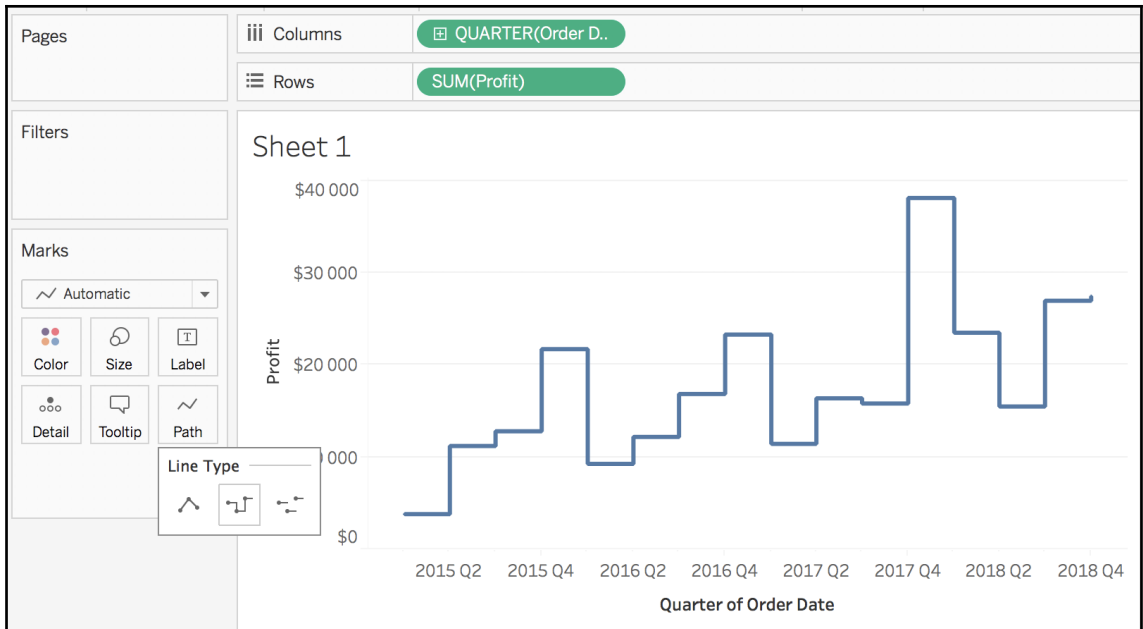
<SUM(Sales)>

For <SUM(Quantity)> products sold

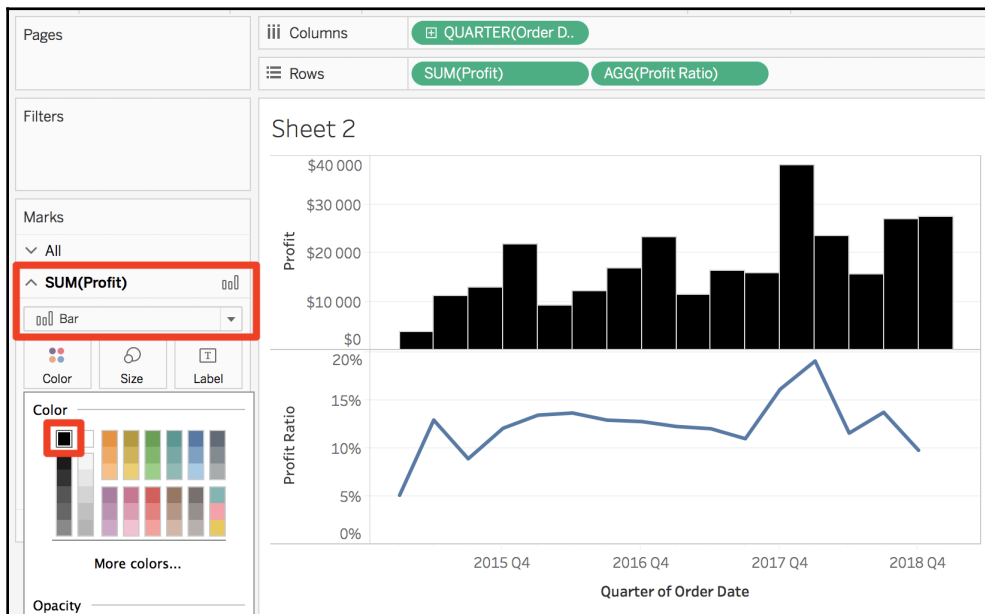
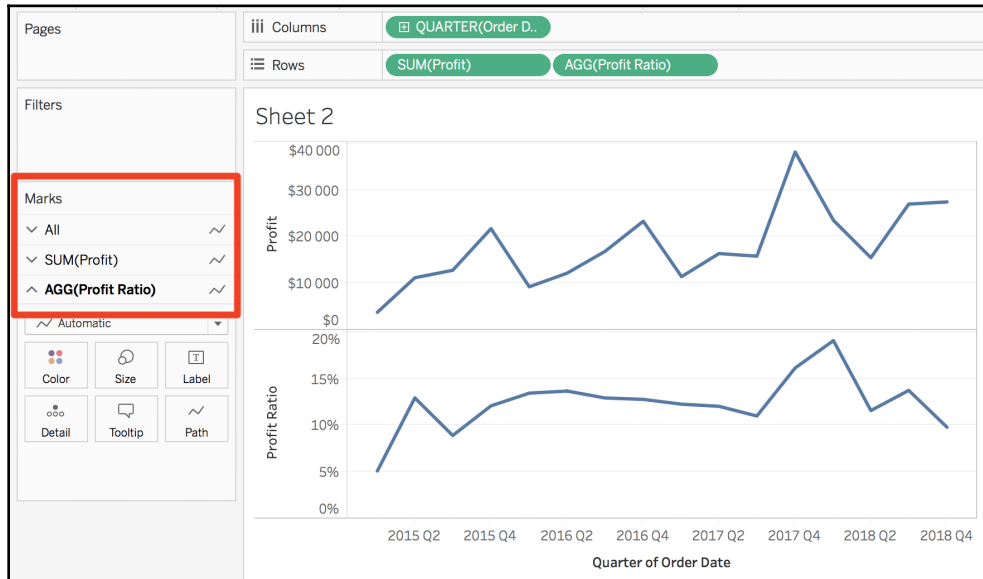


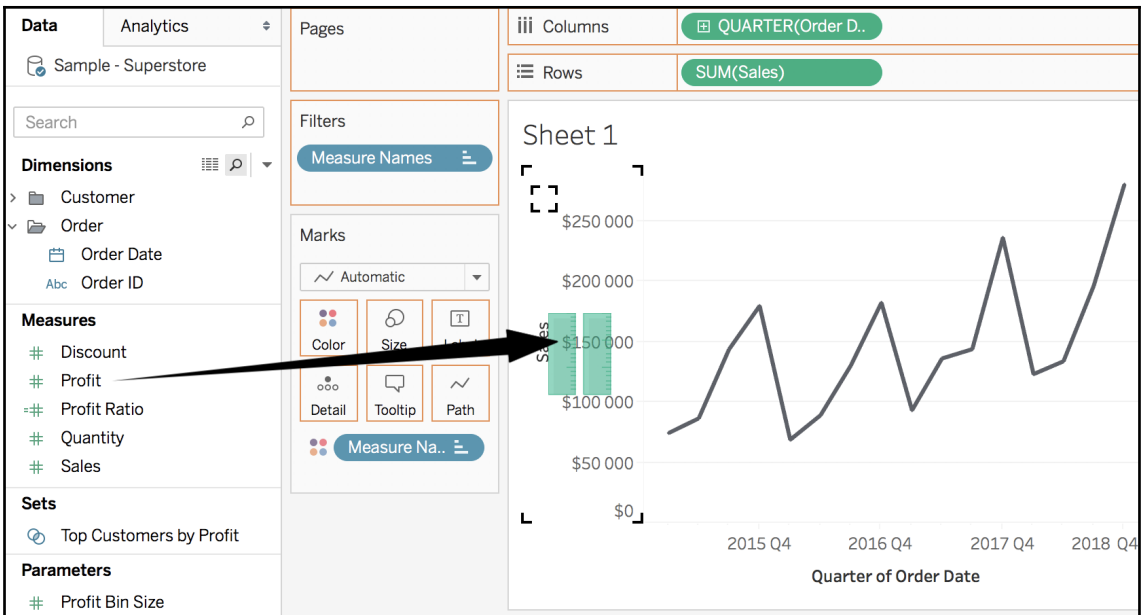
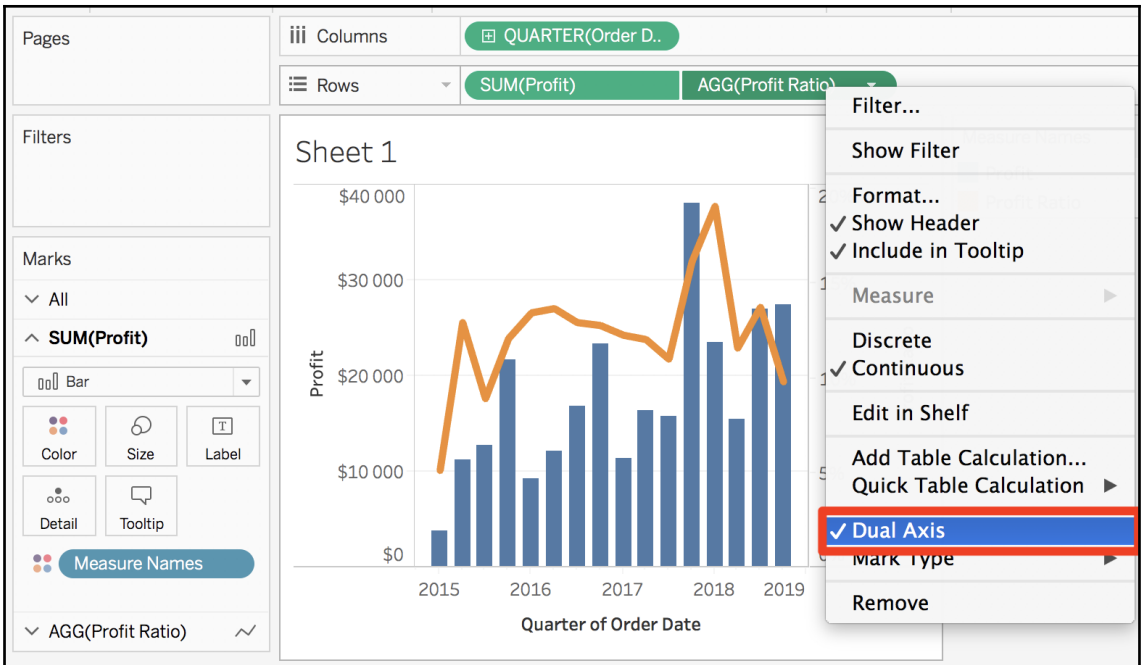


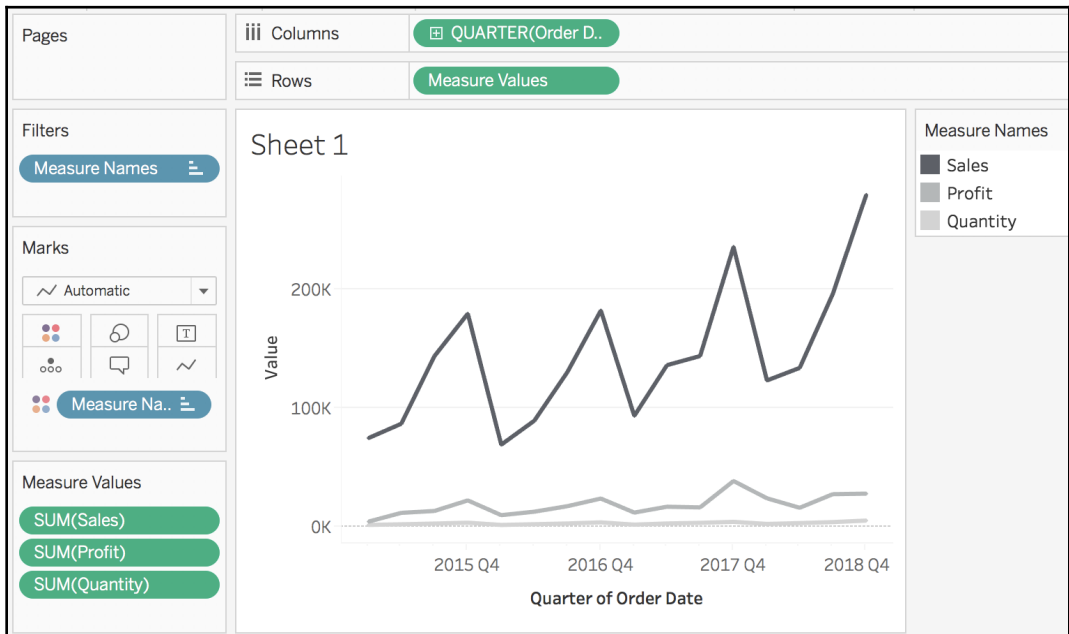
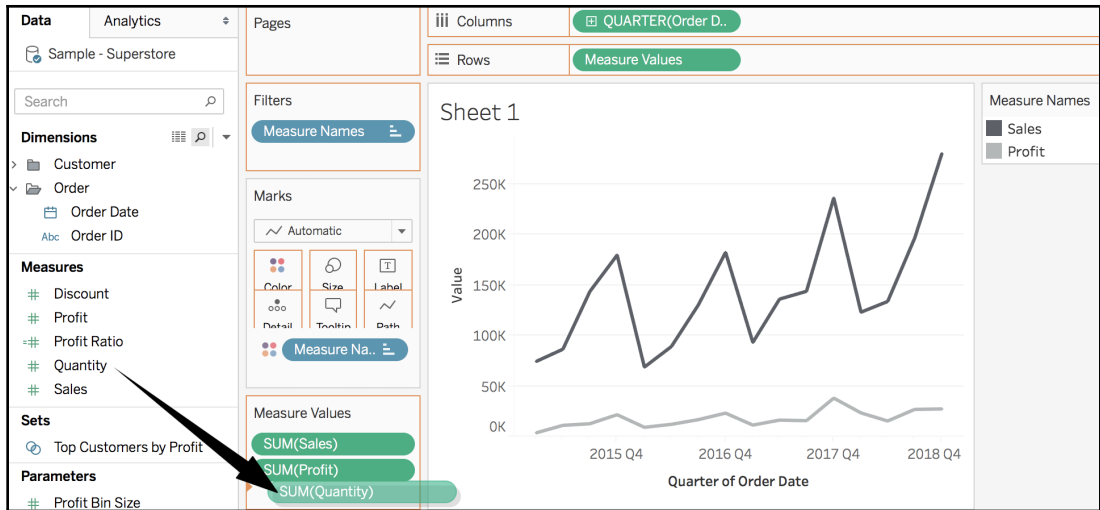


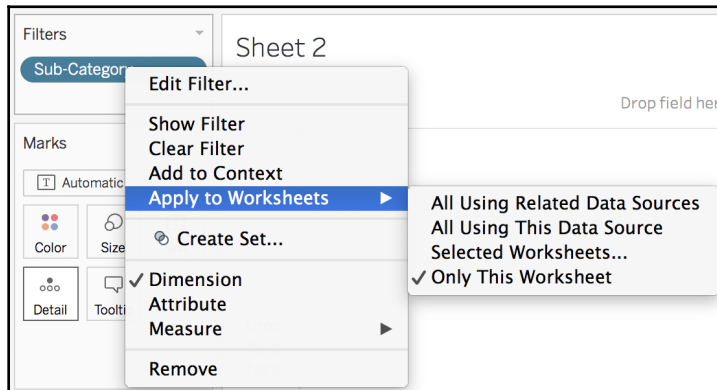
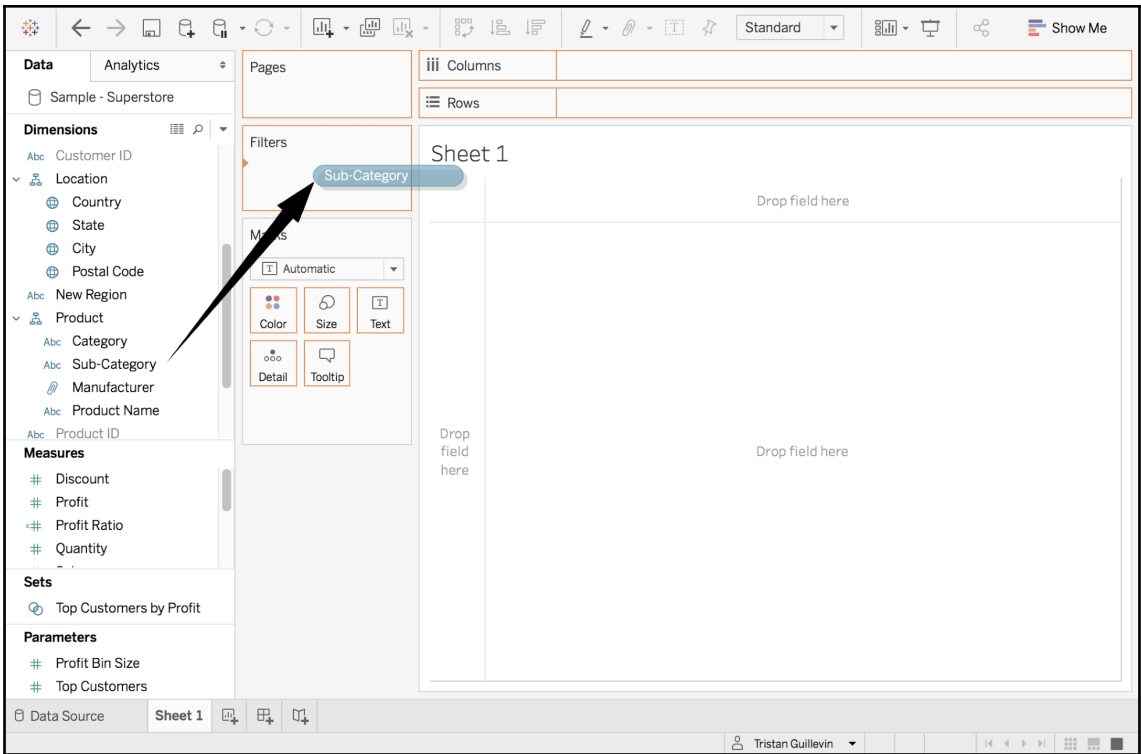


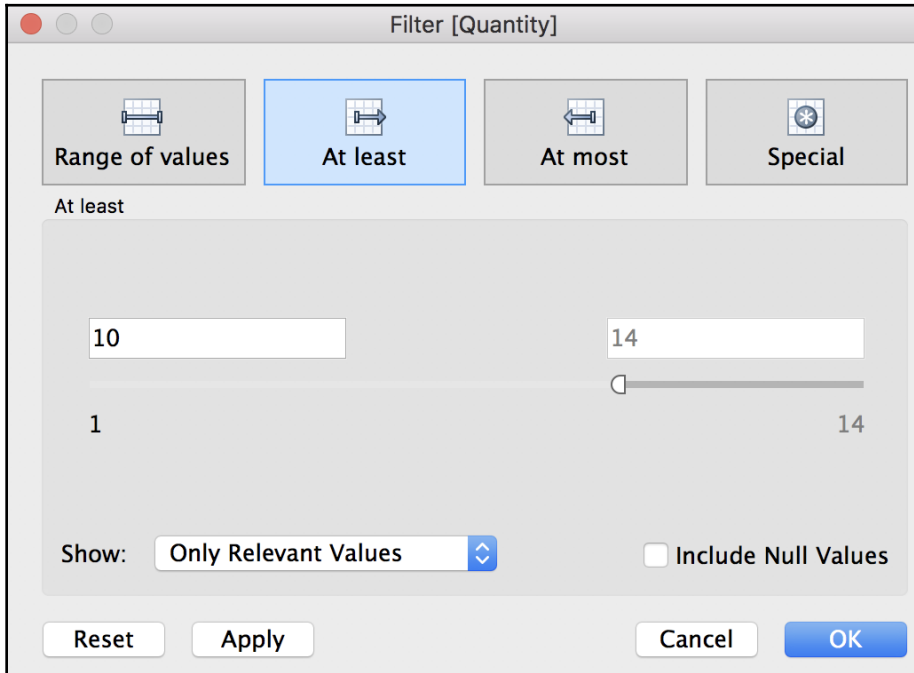
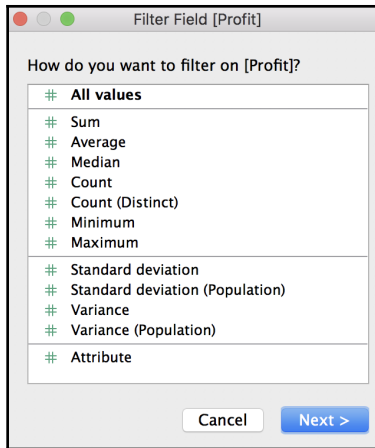
Chapter 7: Design Insightful Visualizations - Part 2











General Wildcard Condition Top

Select from list Custom value list Use all

Enter search text

- Accessories
- Appliances
- Art
- Binders
- Bookcases
- Chairs
- Copiers
- Envelopes
- Fasteners
- Furnishings
- Labels

All None Exclude

General Wildcard Condition Top

Match value: Exclude

Acco|

Contains Starts with Ends with Exactly matches

Include all values when empty

Clear

General Wildcard **Condition** Top

None

By field:

Profit

<

Range of Values

Min:

Max:

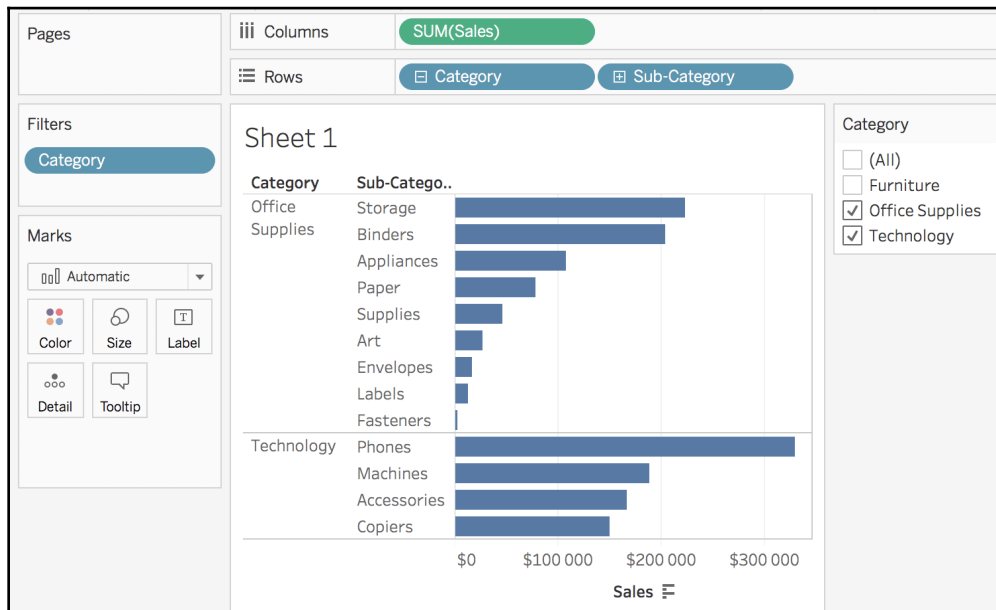
General Wildcard **Condition** **Top**

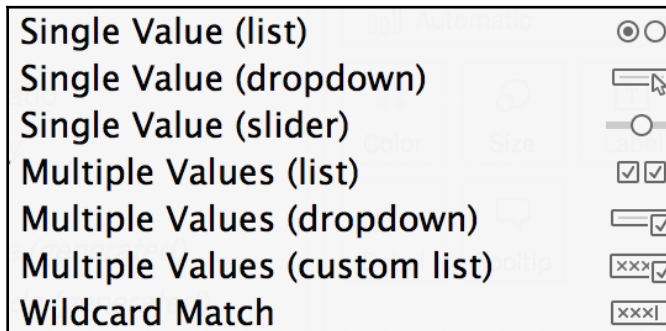
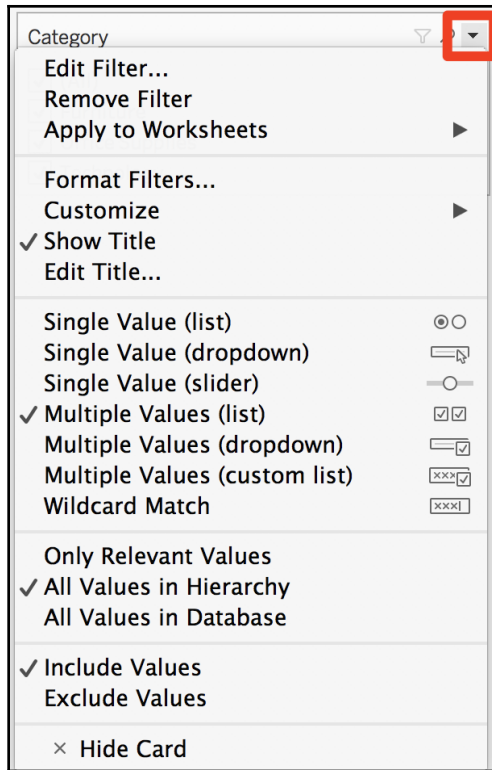
None

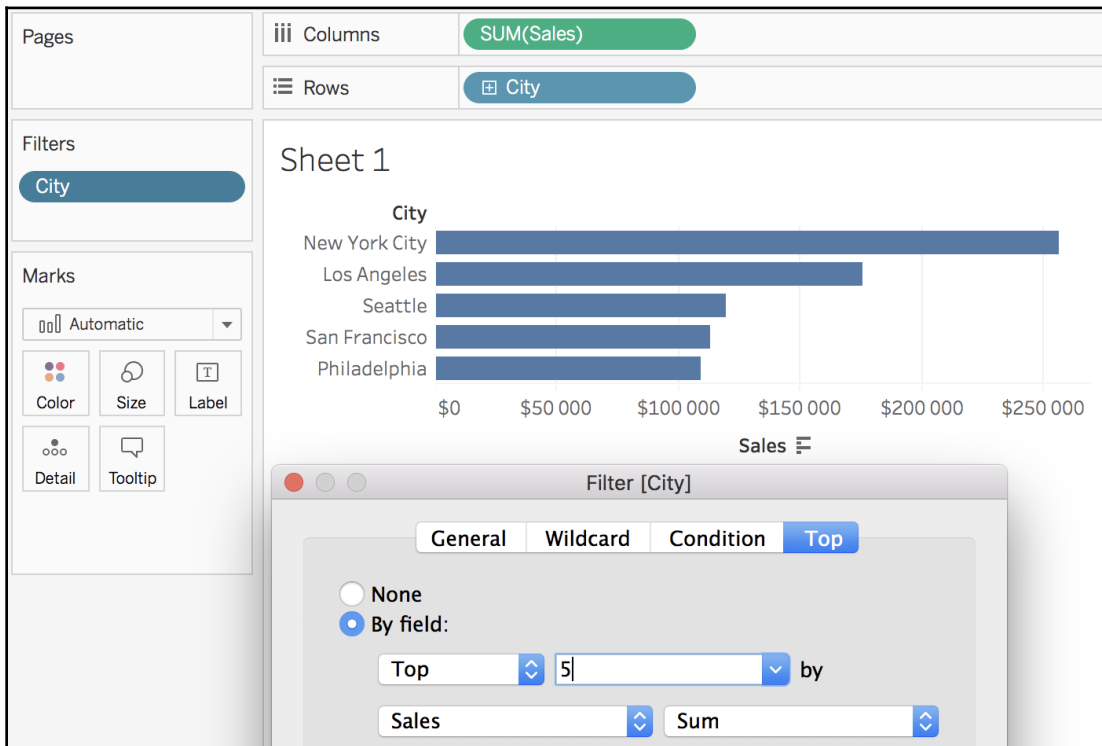
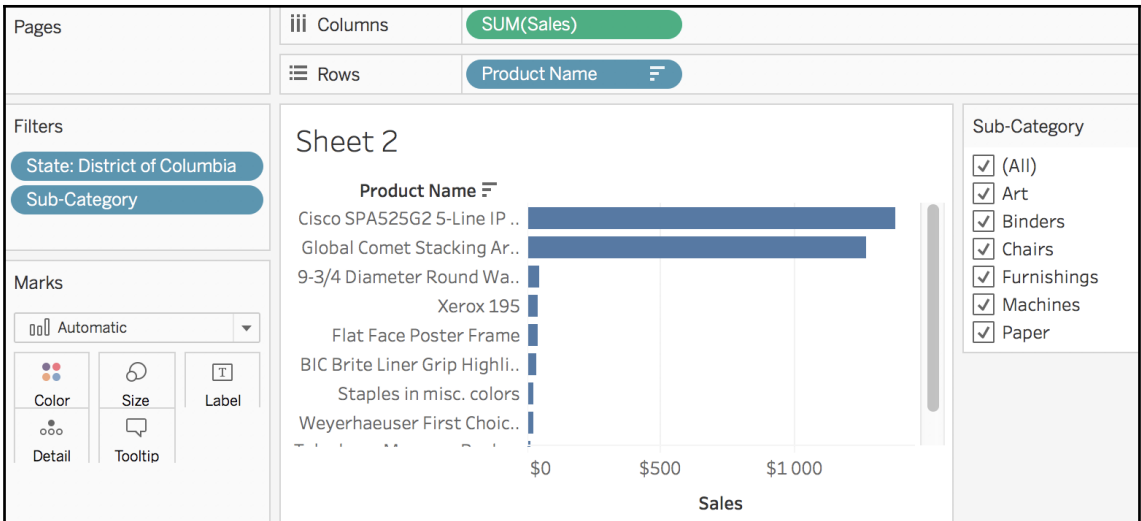
By field:

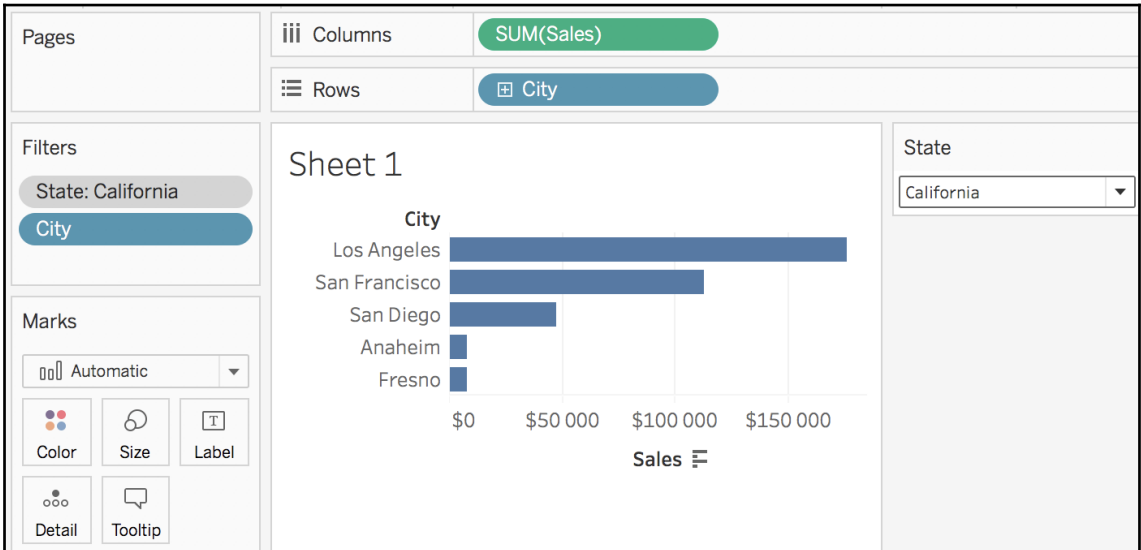
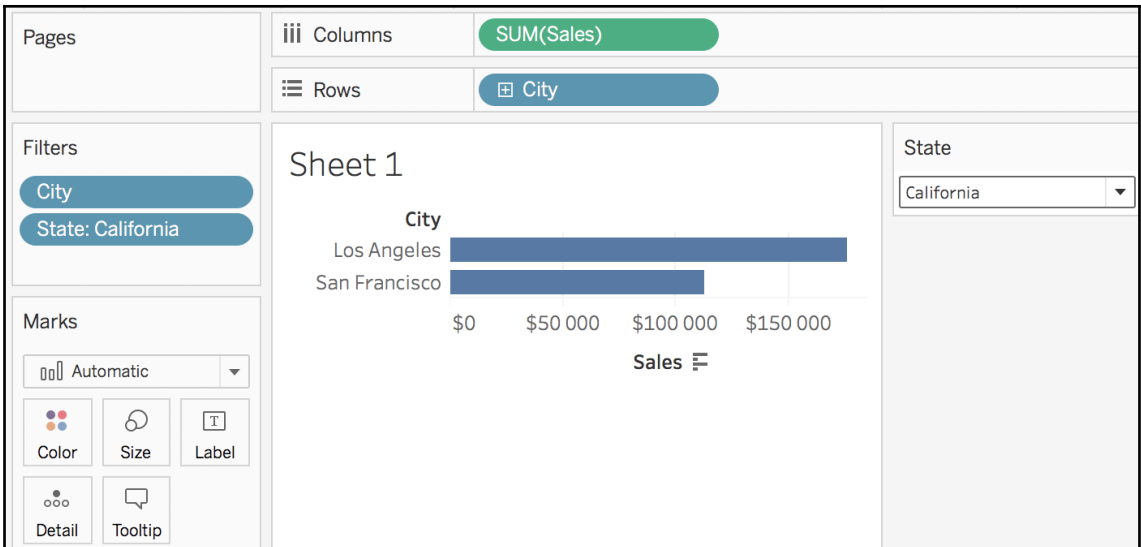
Top by

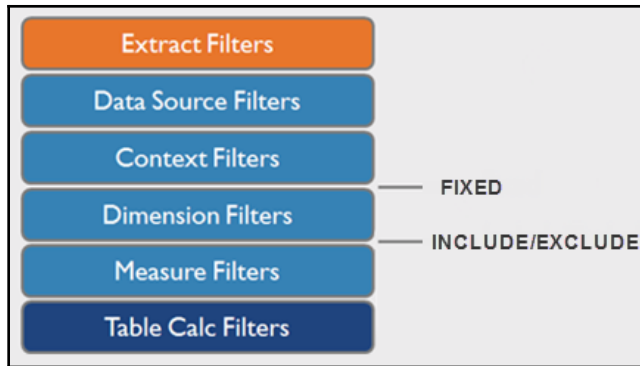
Sales











YEAR(Order Date)

< 2015 >

○

◀ ■ ▶

▬ = ≡

Show history ▾

Marks to show history for

Selected Highlighted

Manual All

Length

All Last: 5

Show

Marks Trails Both

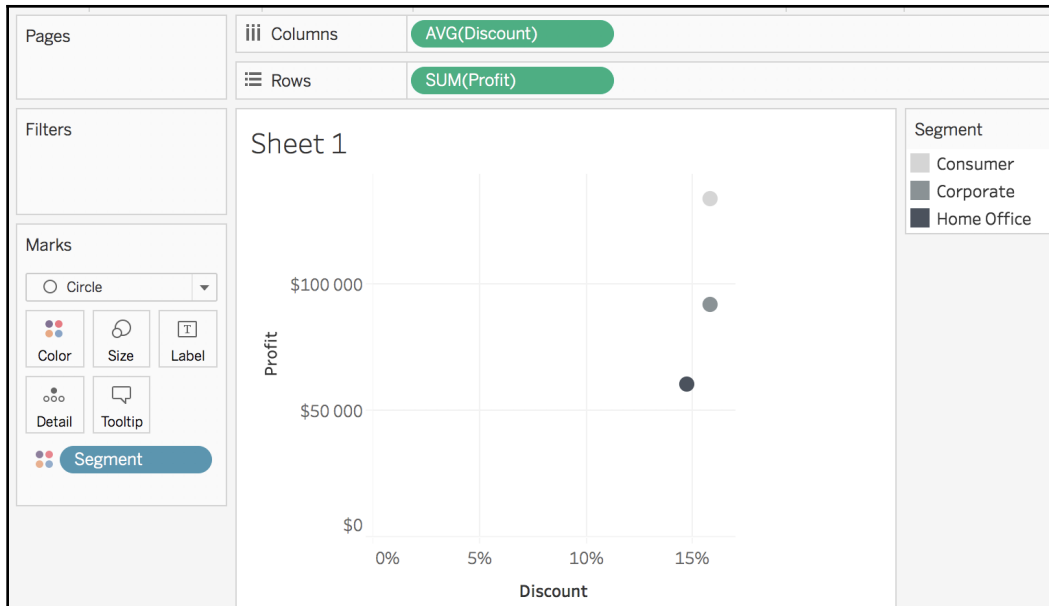
Marks

Format: None ▾

Fade:

Trails

Format: None ▾



Marks to show history for

Selected: Highlighted

Manual:

Length

All Last:

Show

Marks:

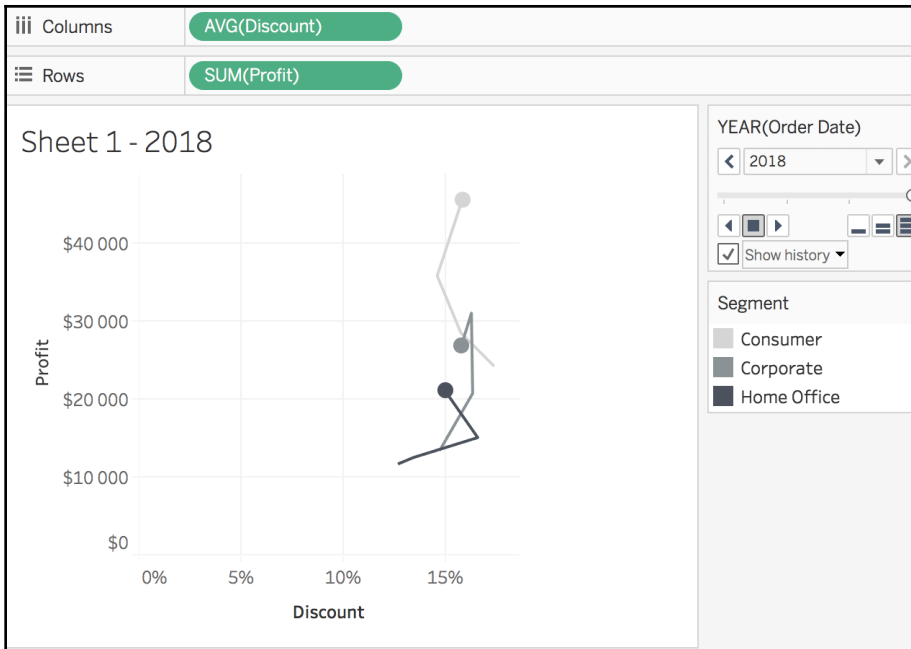
Marks

Format:

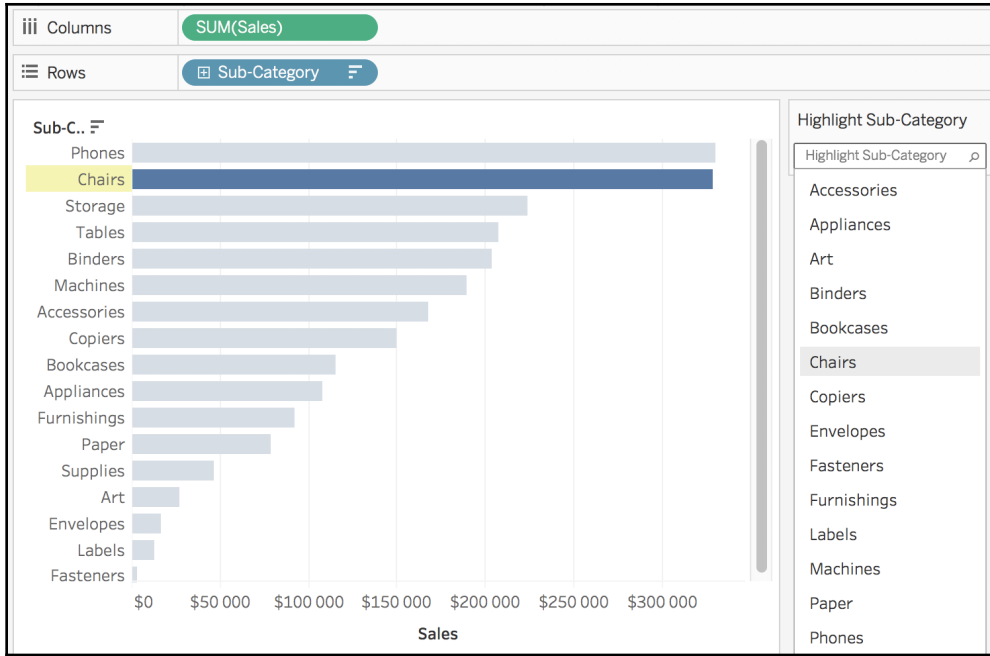
Fade:

Trails

Format:



-
- Filter...
 - Show Filter
 - Format...
 - Show Header
 - Include in Tooltip
 - Dimension Attribute
 - Measure (Sum) ▶
 - Discrete
 - Continuous
 - Edit in Shelf
 - Add Table Calculation...
 - Quick Table Calculation ▶
 - Dual Axis Mark Type ▶
 - Remove



Sort By

Field ▼

Sort Order

Ascending

Descending

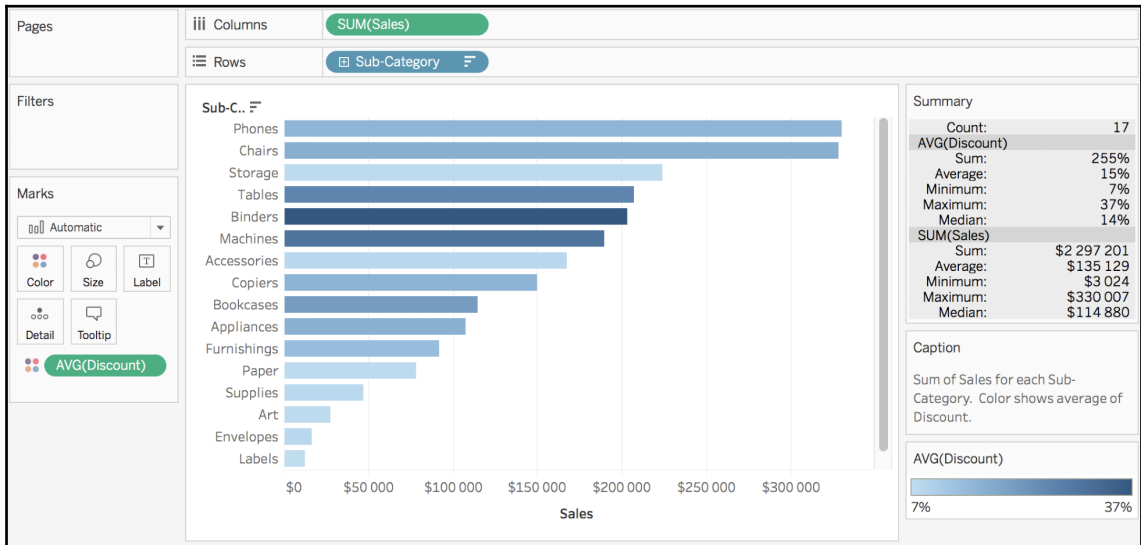
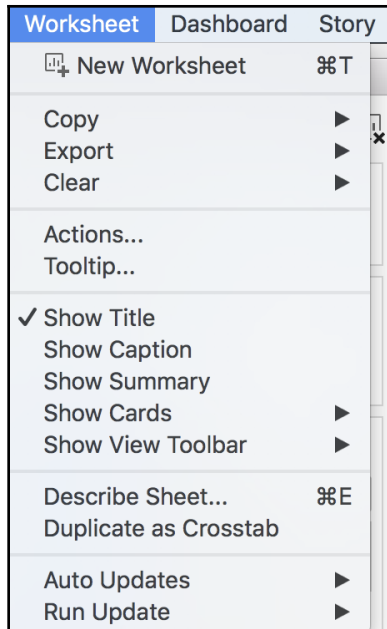
Field Name

Sales ▼

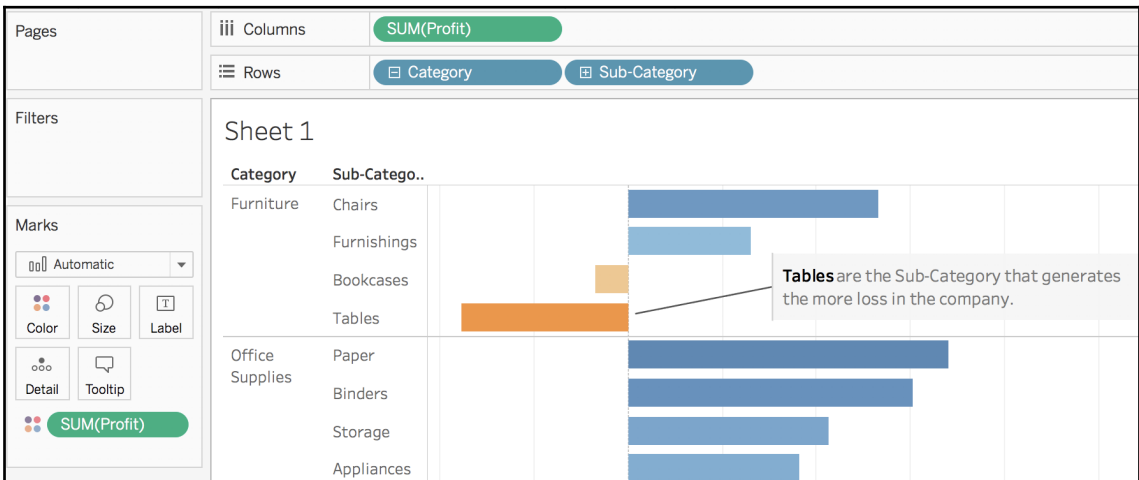
Aggregation

Sum ▼

Clear



- Select All
- View Data...
- Copy ▶
- Format...
- Edit Locations...
- Mark Label ▶
- Annotate ▶
- Trend Lines ▶
- Forecast ▶
- Drop Lines ▶
- Show View Toolbar
- Keep Only
- Exclude
- Group ▶
- Create Set...

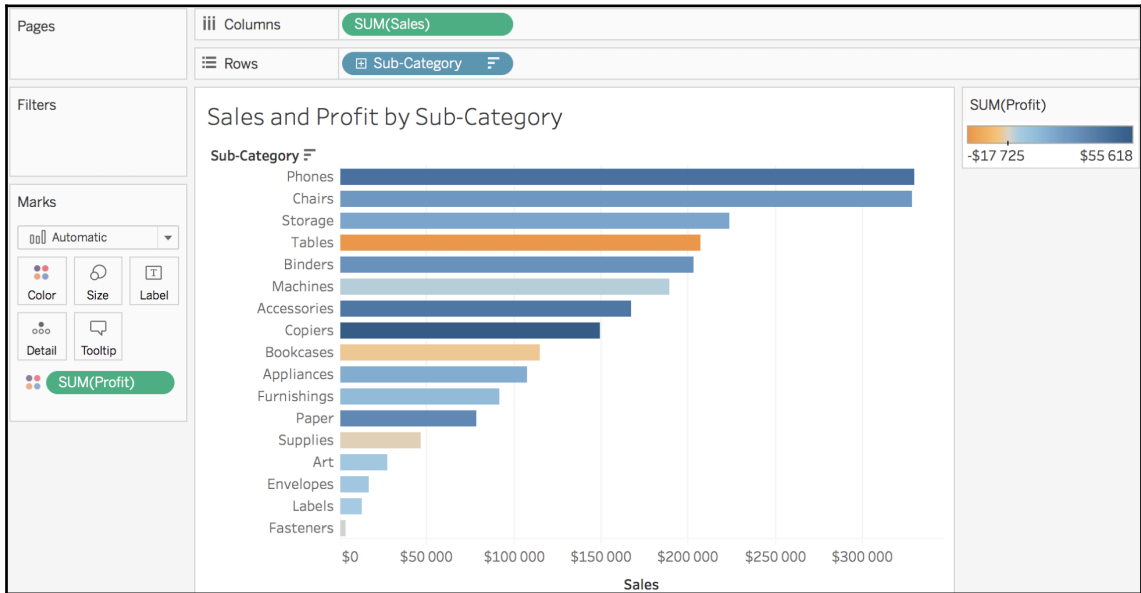


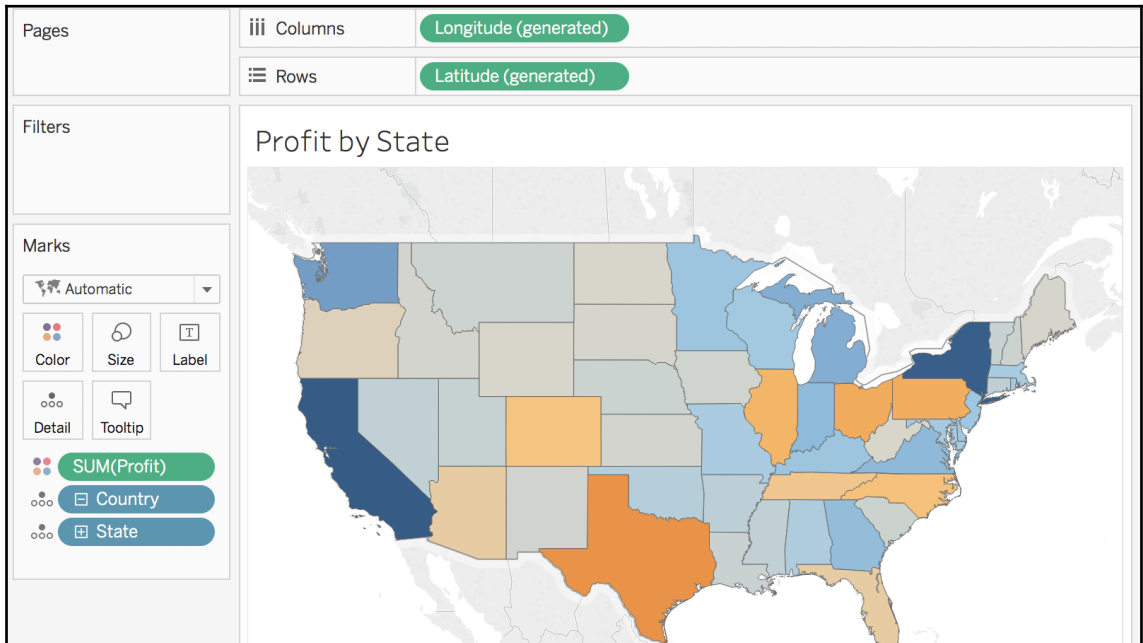
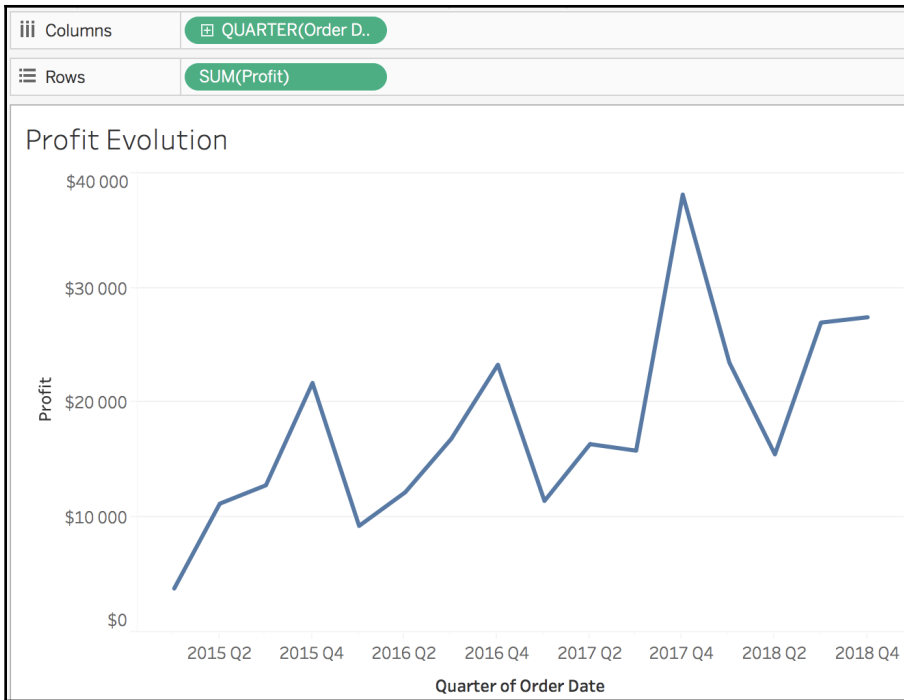
| General | Tick Marks |
|--|--|
| Range | |
| <input checked="" type="radio"/> Automatic | <input checked="" type="checkbox"/> Include zero |
| <input type="radio"/> Uniform axis range for all rows or columns | |
| <input type="radio"/> Independent axis ranges for each row or column | |
| <input type="radio"/> Fixed | |
| Automatic ▼ | Automatic ▼ |
| 0 | 480 572,013075 |
| Scale | |
| <input type="checkbox"/> Reversed | |
| <input type="checkbox"/> Logarithmic | |
| <input checked="" type="radio"/> Positive | <input type="radio"/> Symmetric |
| Axis Titles | |
| Title | |
| Sales | |
| Subtitle | <input checked="" type="checkbox"/> Automatic |

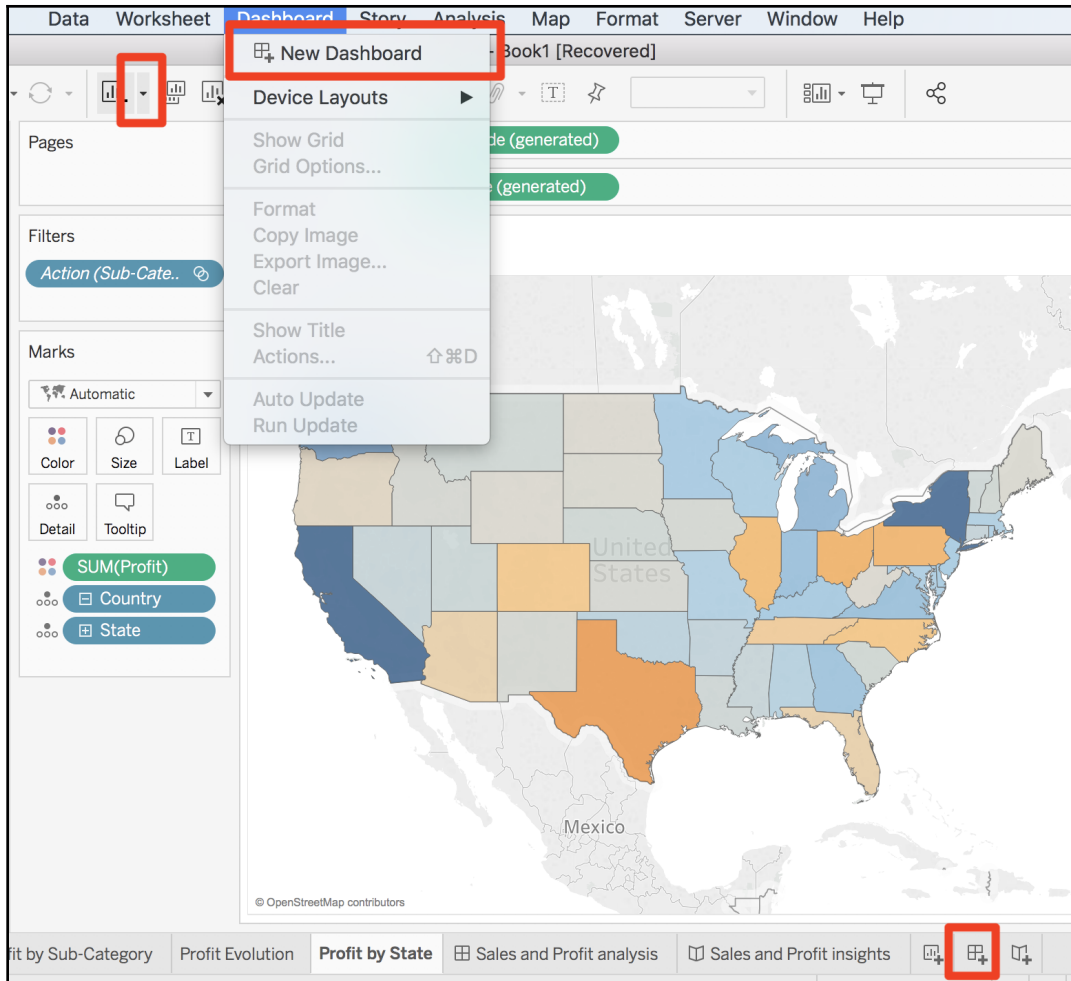
The screenshot displays the Tableau software interface. On the left, the 'Format Font' pane is open, showing settings for various text elements. The 'Default' section includes Worksheet, Pane, Header, Tooltip, and Title. The 'Total' section includes Pane and Header. The 'Grand Total' section includes Pane. A 'Clear' button is at the bottom of the pane. The main view shows a horizontal bar chart titled 'State' with 'SUM(Sales)' on the columns shelf and 'State' on the rows shelf. The chart shows sales for 17 states, with California having the highest sales. The x-axis is labeled 'Sales' and ranges from \$0 to \$400,000. The y-axis is labeled 'State' and lists the states. The 'Marks' shelf contains 'AVG(Discount)'. The 'Columns' shelf contains 'SUM(Sales)' and the 'Rows' shelf contains 'State'.

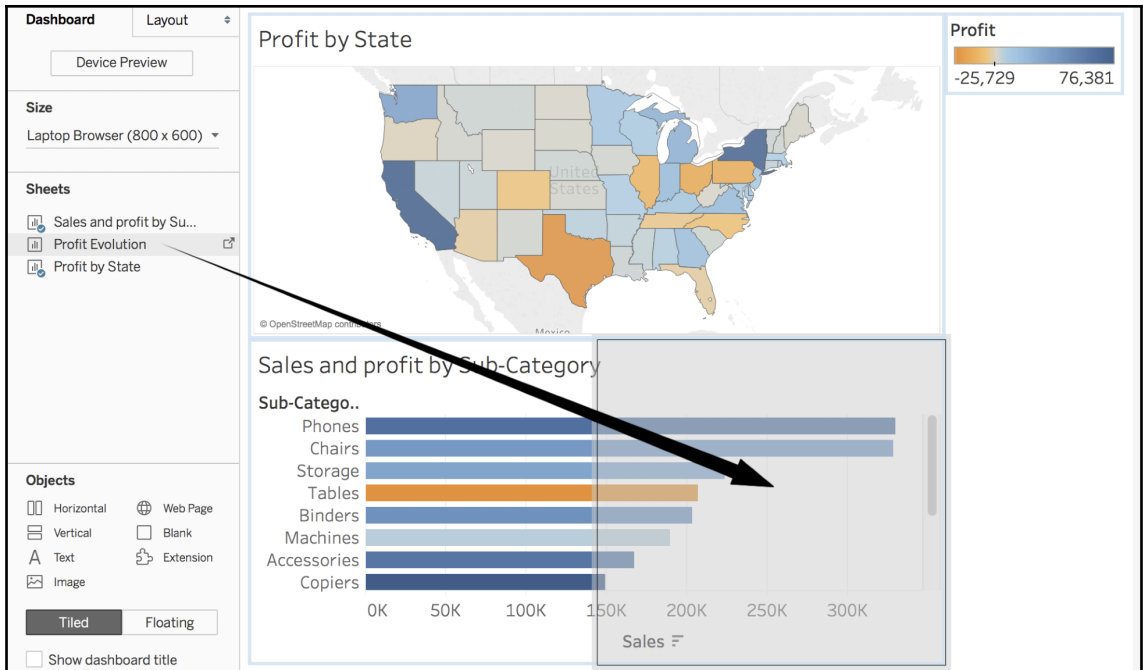
| State | Sales (Approximate) |
|----------------|---------------------|
| California | \$400,000 |
| New York | \$300,000 |
| Texas | \$180,000 |
| Washington | \$150,000 |
| Pennsylvania | \$120,000 |
| Florida | \$100,000 |
| Illinois | \$90,000 |
| Ohio | \$80,000 |
| Michigan | \$70,000 |
| Virginia | \$60,000 |
| North Carolina | \$50,000 |
| Indiana | \$40,000 |
| Georgia | \$30,000 |
| Kentucky | \$20,000 |
| New Jersey | \$15,000 |
| Arizona | \$10,000 |
| Wisconsin | \$5,000 |
| Colorado | \$5,000 |

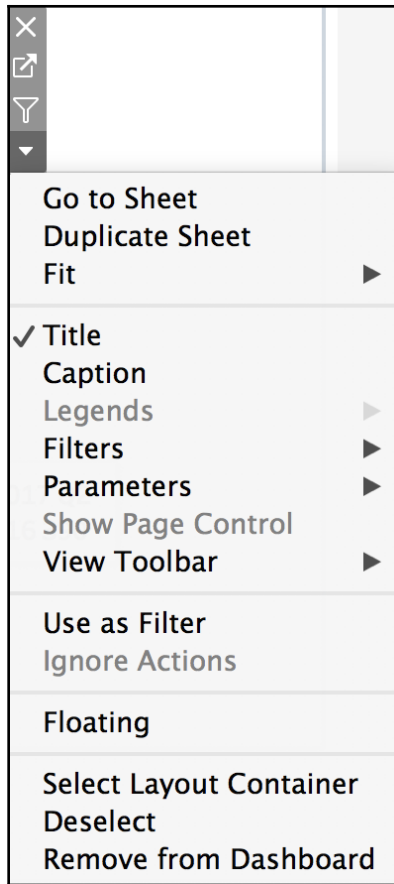
Chapter 8: Create Powerful Dashboards and Stories











Dashboard Layout

Device Preview

Size
Custom size (1200 x 800)

Sheets

- Sales and Profit by Sub-Category
- Profit Evolution
- Profit by State

Objects

| | |
|------------|-----------|
| Horizontal | Web Page |
| Vertical | Blank |
| Text | Button |
| Image | Extension |

Tiled Floating

Show dashboard title

Selected item
Sales analysis

Show title

Floating

Position

x y

Size

w h


Border
None

Background
None

Outer Padding

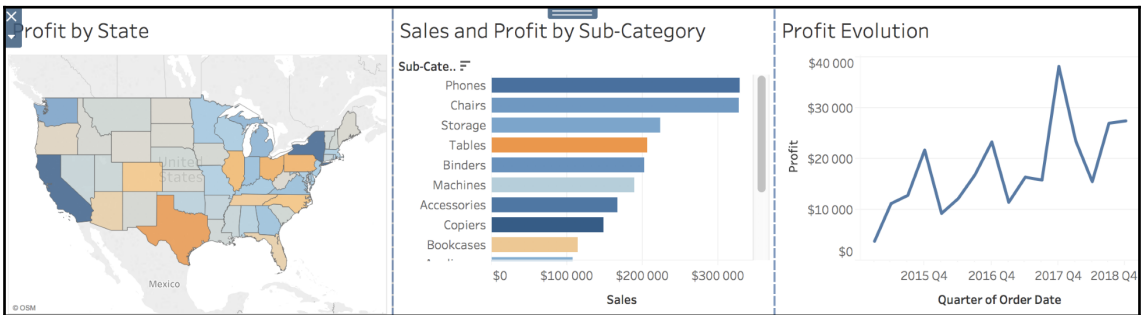
Inner Padding

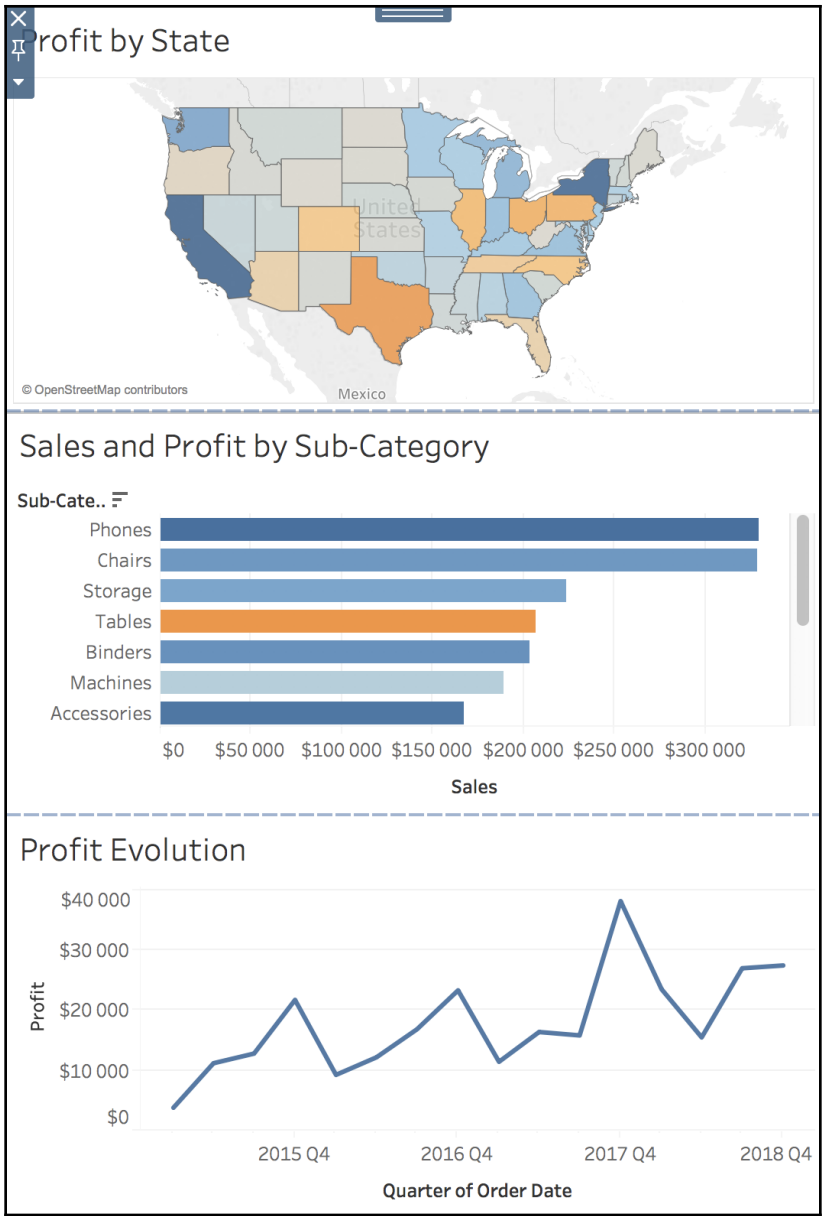
Item hierarchy
Sales analysis

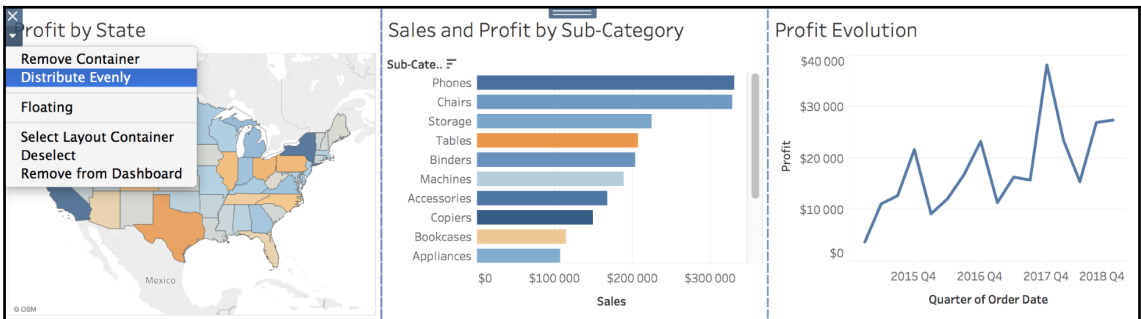
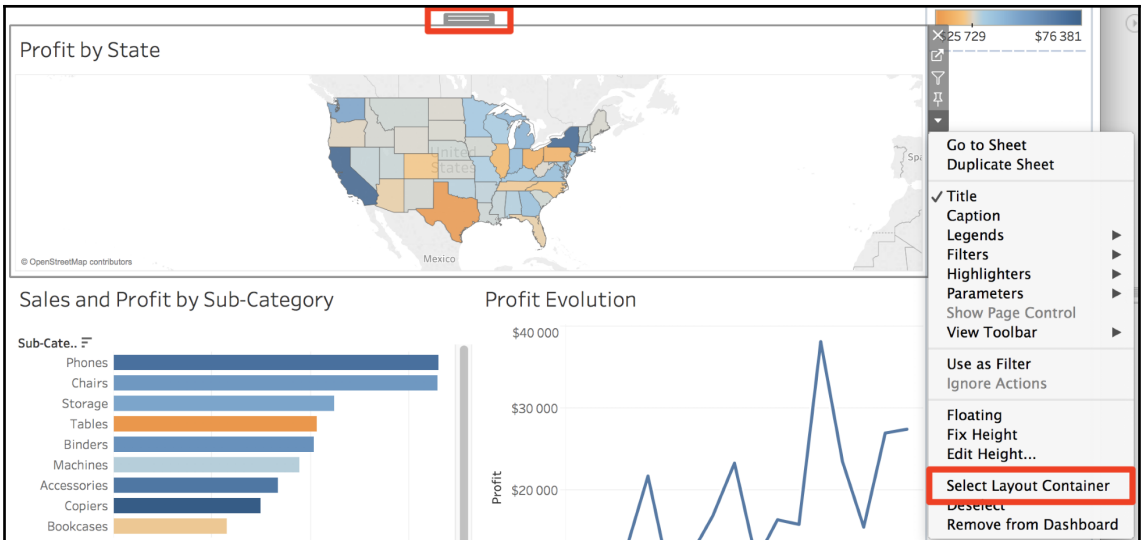
>  Tiled

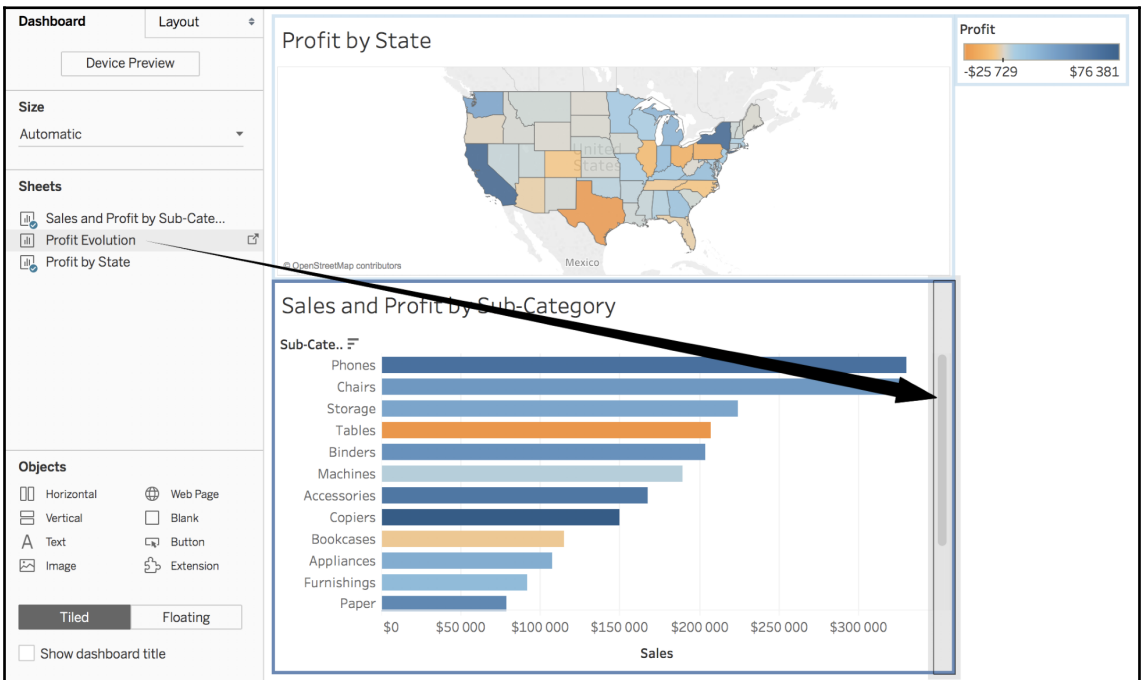
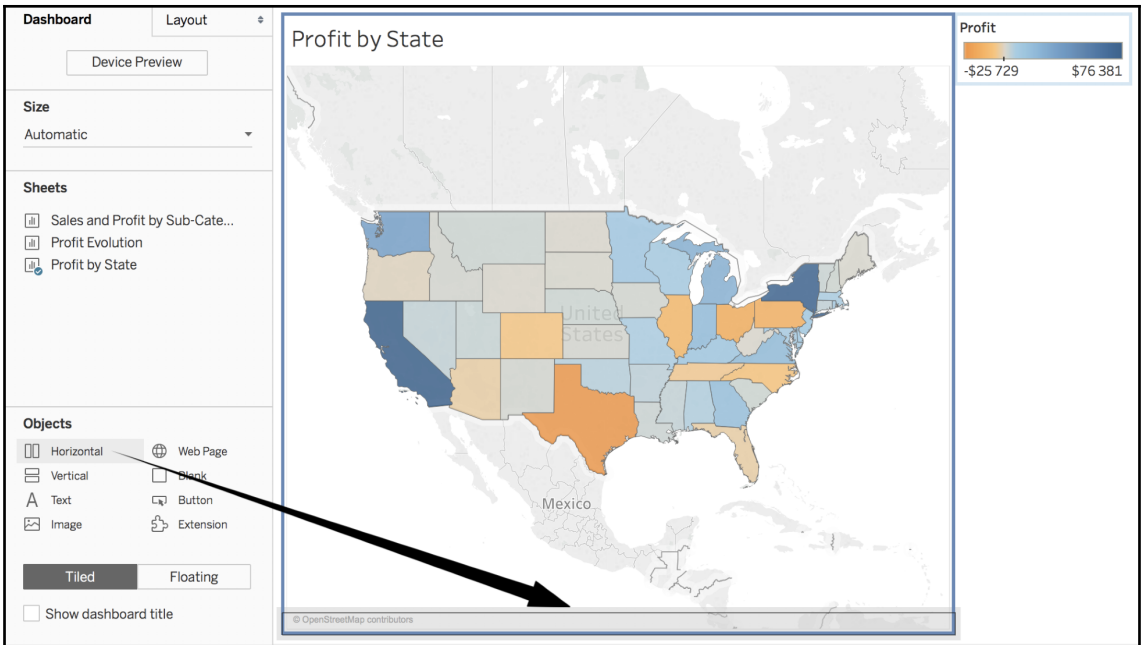
Dashboard Story Anal

- New Dashboard
- Device Layouts ▶
- Format
- Copy Image
- Export Image...
- Clear
- Show Title
- Actions...
- ✓ Auto Update
- Run Update





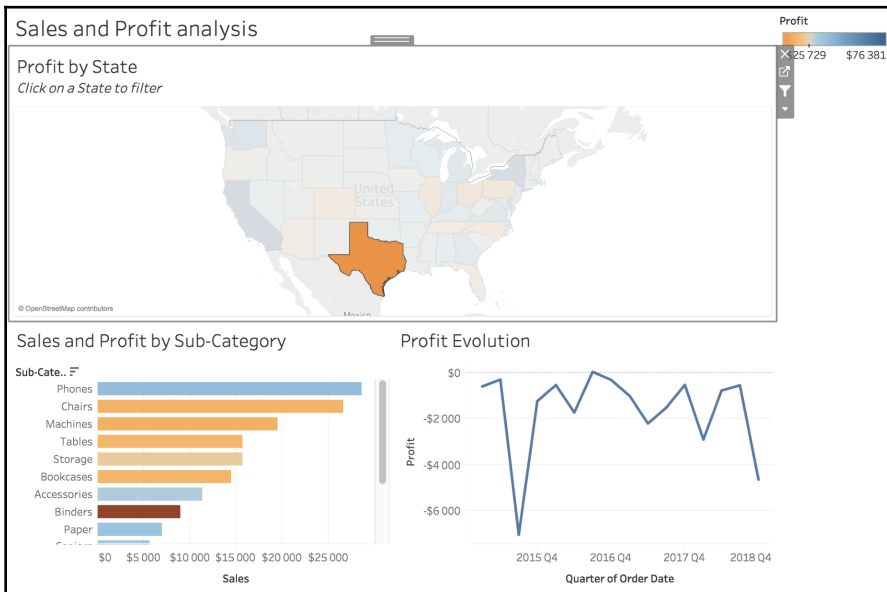




Actions let you create interactive relationships between data, dashboard objects, other workbook sheets, and the web.

| Name | Run On | Source | Fields |
|------|--------|--------|--------|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

Show actions for...



Add Filter Action

Name: ▶

Source Sheets

Sales and Profit analysis ⌵

- Profit by State
- Profit Evolution
- Sales and Profit by Sub-Category

Run action on:

Run on single select only

Target Sheets

Sales and Profit analysis ⌵

- Profit by State
- Profit Evolution
- Sales and Profit by Sub-Category

Clearing the selection will:

- Leave the filter
- Show all values
- Exclude all values

Target Filters

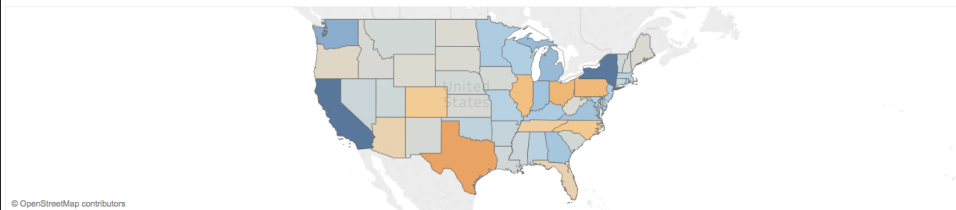
Selected Fields All Fields

| Source Field | Target Field | Target Data Source |
|--------------|--------------|--------------------|
| | | |
| | | |
| | | |

Profit analysis

Profit by State

Click on a State to filter



© OpenStreetMap contributors

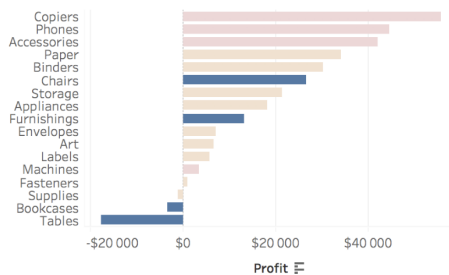
Category

- Furniture
- Office Supplies
- Technology

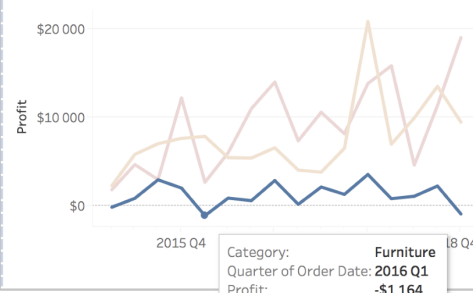
Profit

-\$25 729 \$76 381

Profit by Sub-Category



Profit Evolution by Category



Name:

Source Sheets

Profit analysis

Run action on:

Profit by State

Profit by Sub-Category

Profit Evolution by Category

Target Sheets

Profit analysis

Profit by State

Profit by Sub-Category

Profit Evolution by Category

Target Highlighting

Selected Fields

Dates and Times

All Fields

Category

QUARTER(Order Date)

Sub-Category

Profit by State

Country: United States
State: California
Profit: \$76,381
[Open State Wikipedia page](#)

[Not logged in](#) | [Talk](#) | [Contributions](#) | [Create account](#) | [Log in](#)

Article Talk Read View source View history

California

From Wikipedia, the free encyclopedia Coordinates: 37°N 120°W

For other uses, see [California \(disambiguation\)](#).

California is a U.S. state in the Pacific Region of the United States. With 39.5 million residents, California is the most populous state in the United States and the third largest by area. The state capital is Sacramento. The Greater Los Angeles Area and the San Francisco Bay Area are the nation's second- and fifth-most populous urban regions, with 18.7 million and 8.8 million residents respectively.^[12] Los Angeles is California's most populous city, and the country's second-most populous, after New York City. California also has the nation's most populous county, Los Angeles County; its largest county by area, San Bernardino County; and its fifth most densely populated county, San Francisco.

Name:

Source Sheets

Sales and Profit analysis

Profit by State

Run action on:

Hover

Select

Menu

URL

URL Options

URL Encode Data Values

 Allow Multiple Values

Item Delimiter:
 Delimiter Escape:

Name:

Source Sheets

Sales and Profit analysis Run action on:

- Profit by State
- Profit Evolution
- Sales and Profit by Sub-Category

Hover

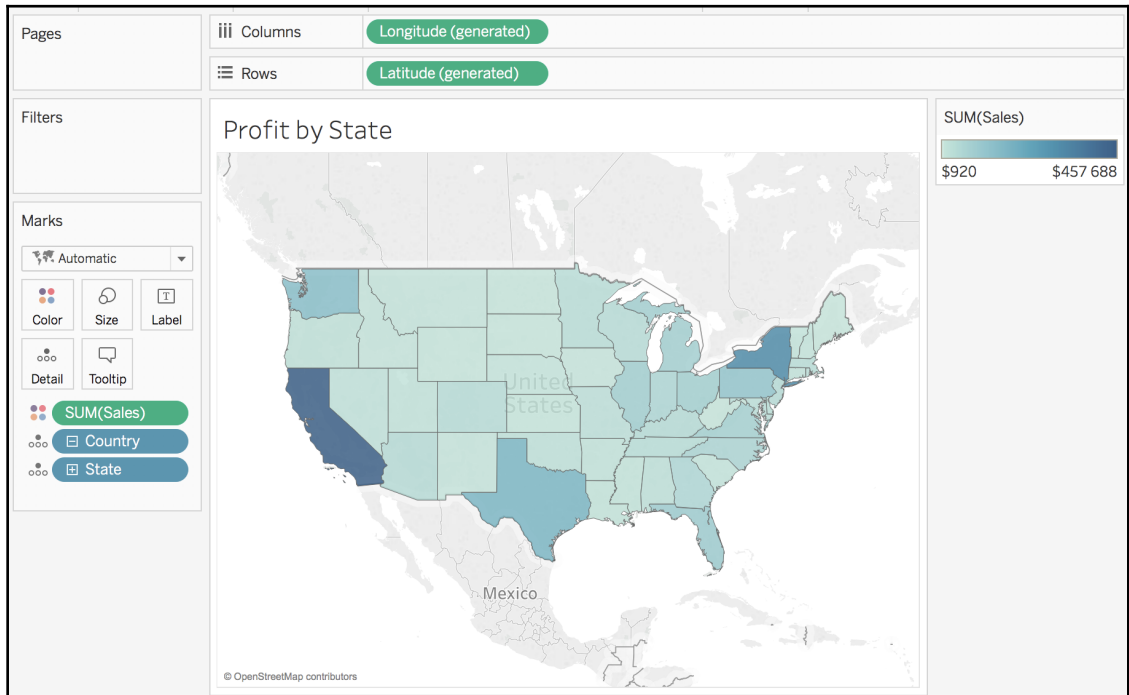
Select

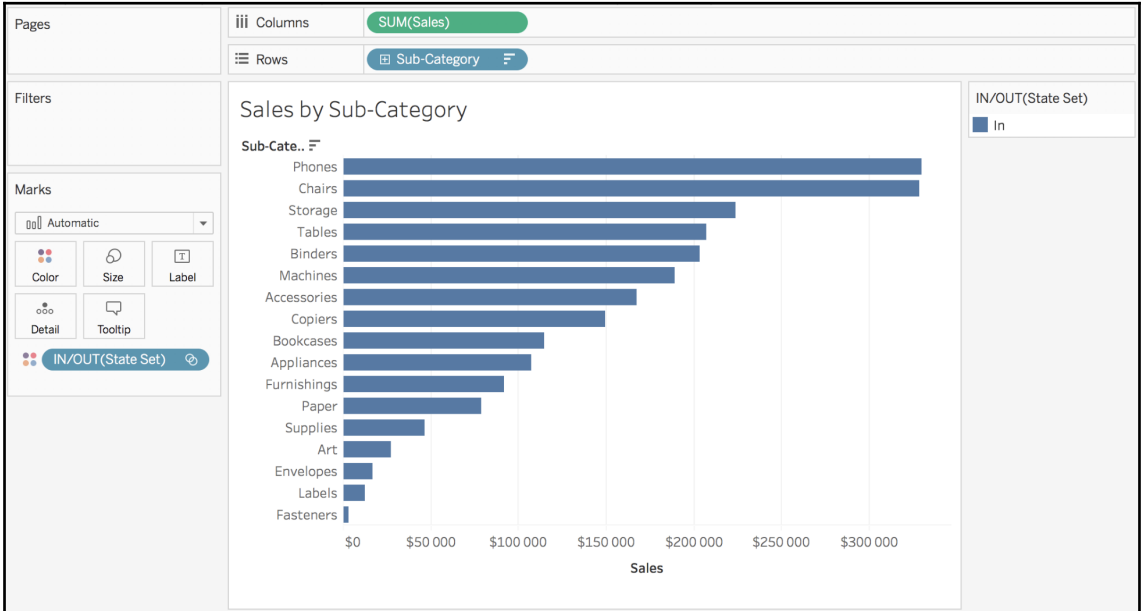
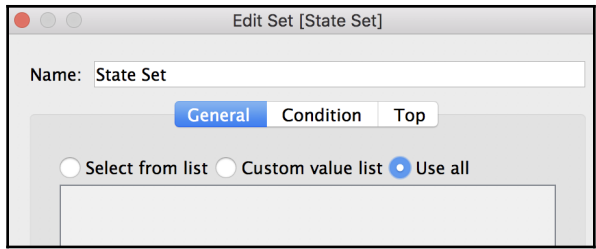
Menu

Run on single select only

Target Sheet

Order Details





Name:

Source Sheets

Sales and Profit analysis

Run action on:

Profit by State

Sales and Profit by Sub-Category

Hover

Select

Menu

Target Set

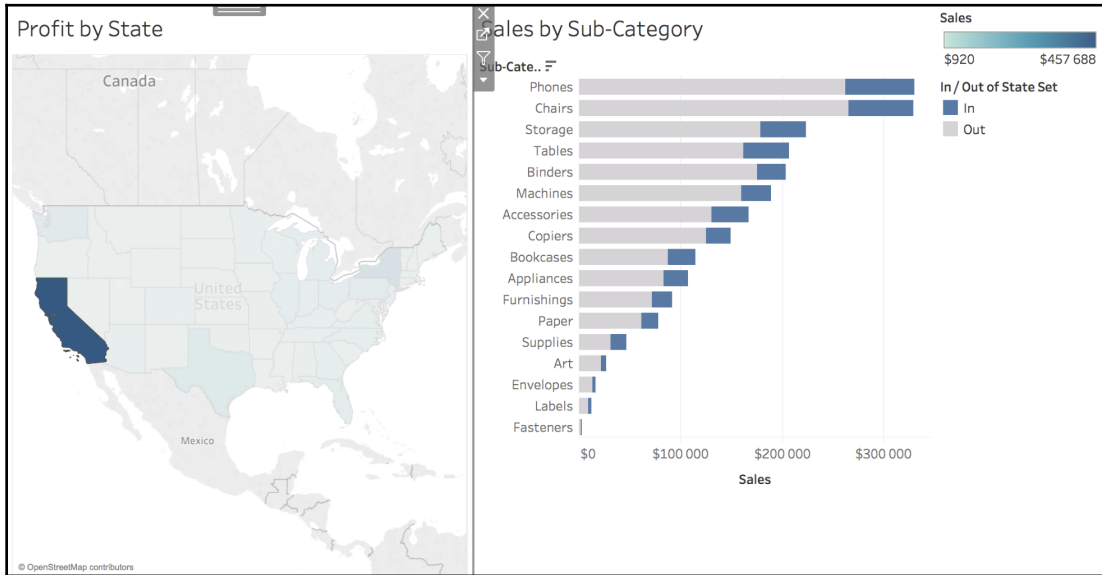
Clearing the selection will:

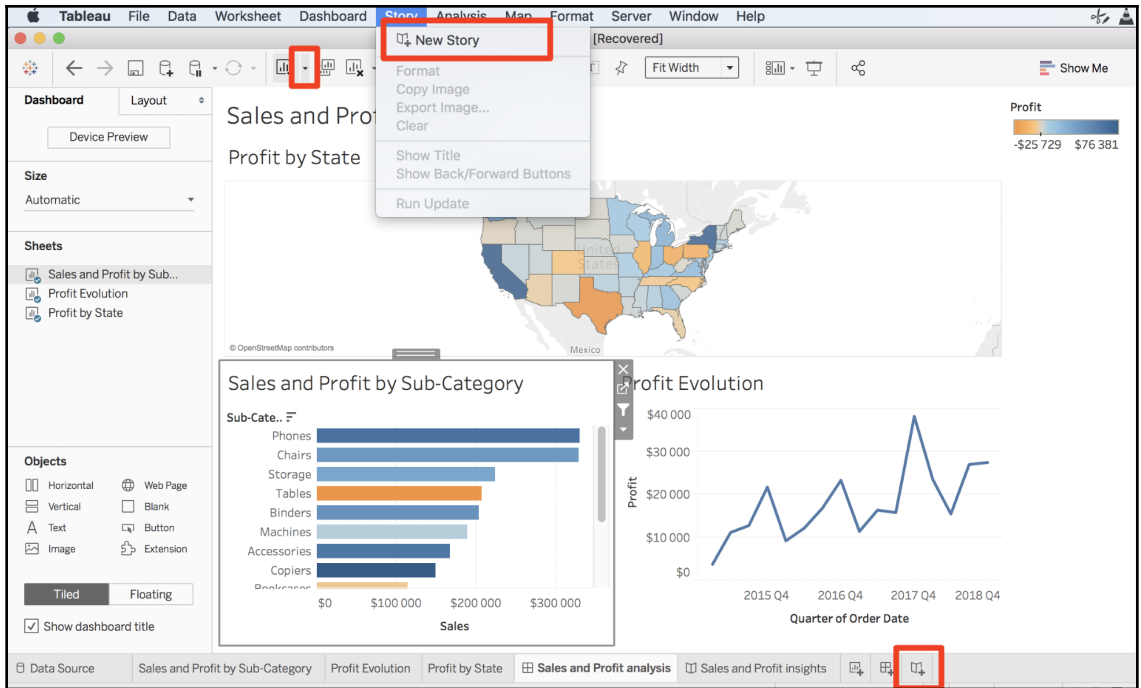
Keep set values

Add all values to set

Remove all values from set

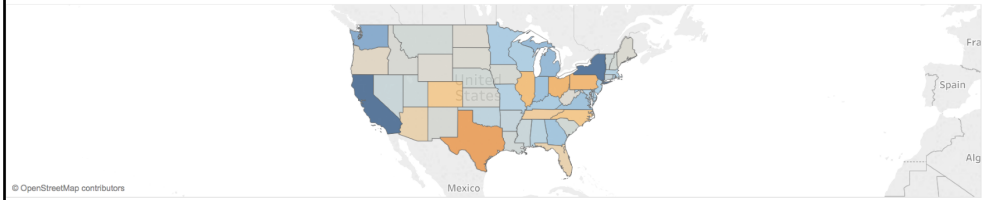
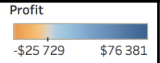
Cancel OK



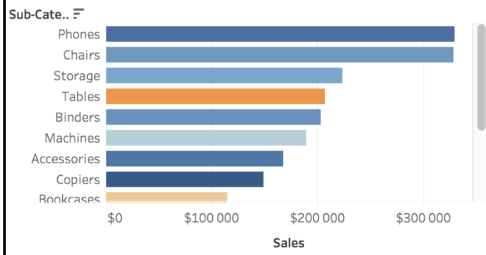


Sales and Profit analysis

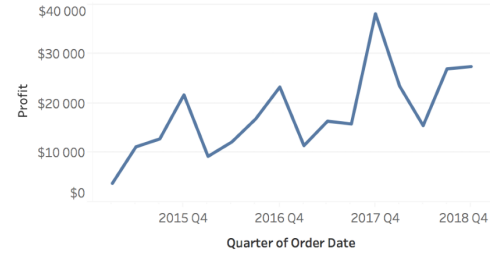
Profit by State



Sales and Profit by Sub-Category



Profit Evolution

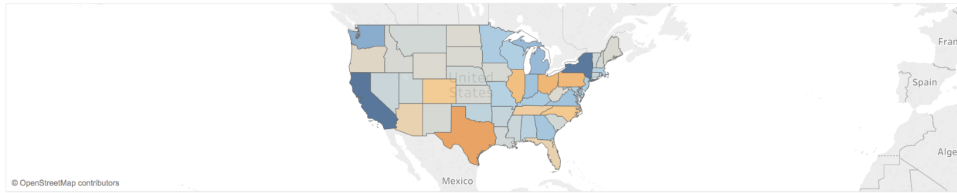
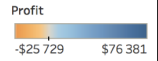


Sales and Profit Insights

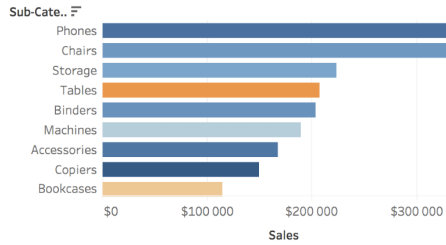
Sales and Profit Analysis

Sales and Profit analysis

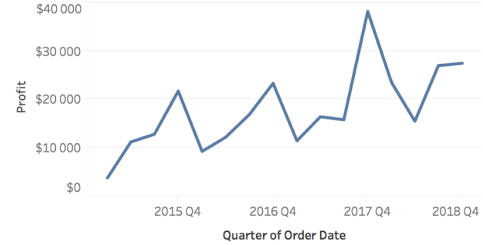
Profit by State



Sales and Profit by Sub-Category



Profit Evolution



Profit by Sub-Category Profit Evolution Profit by State Sales and Profit analysis Sales and Profit Insights

New story point

Blank

Duplicate

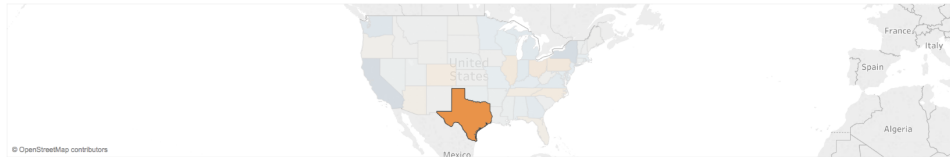
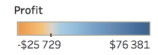
Sales and Profit Insights



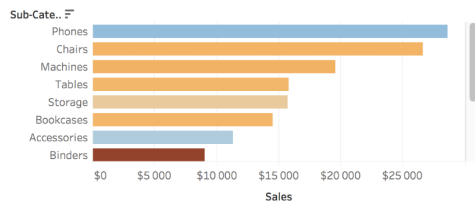
◀ Sales and Profit Analysis Texas is the less profitable State ▶

Sales and Profit analysis

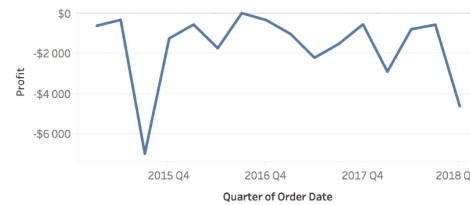
Profit by State



Sales and Profit by Sub-Category



Profit Evolution



◀ Sub-Category Profit Evolution Profit by State Sales and Profit analysis Sales and Profit Insights

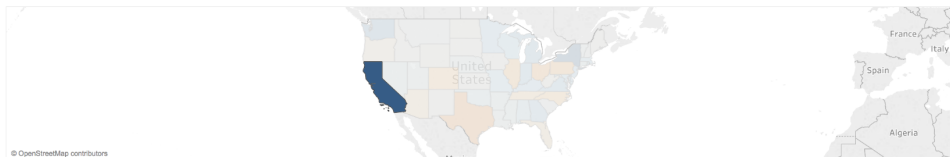
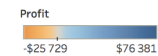
Sales and Profit Insights



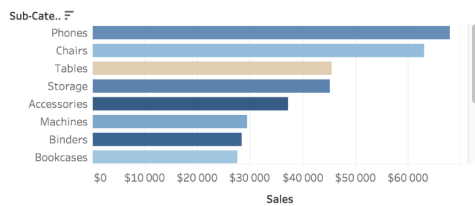
◀ Sales and Profit Analysis Texas is the less profitable State ▶

Sales and Profit analysis

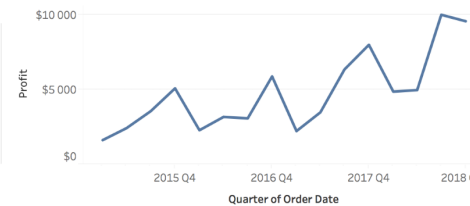
Profit by State



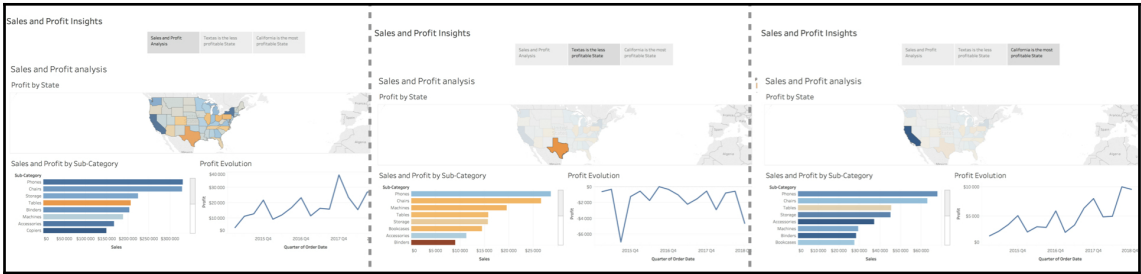
Sales and Profit by Sub-Category



Profit Evolution



◀ Sub-Category Profit Evolution Profit by State Sales and Profit analysis Sales and Profit Insights



<

Sales and Profit Analysis

Texas is the less profitable State

California is the most profitable State

>

<

1

2

3

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2/3

>

Chapter 9: Publish and Interact in Tableau Server

Connect

To a File

- Microsoft Excel
- Text file
- JSON file
- PDF file
- Spatial file
- Statistical file
- More...

To a Server

- Tableau Server
- Microsoft SQL Server
- MySQL
- Oracle
- Amazon Redshift
- More...

Saved Data Sources

- Sample - Superstore
- World Indicators

Open

Open a Workbook

More Samples

Discover

- Training
 - Getting Started
 - Connecting to Data
 - Visual Analytics
 - Understanding Tableau
 - More training videos...
- Viz of the Week
 - Boeing Commercial Market Outlook 2018-2037
- Resources
 - Get Tableau Prep
 - Blog - Practice your data viz skills and build your portfolio with these Tableau Commu...
 - Register for Tableau Conference
 - Forums

Sample Workbooks

- Superstore
- Regional
- World Indicators

Tableau

Content Users Groups Schedules Tasks Status Settings

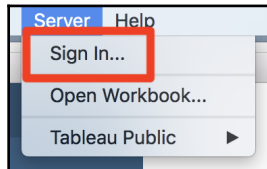
Workbooks

Create Select All Views: All

- Executive Overview - Profitability (M)**
Analyze Superstore ☆ ...
- Sales Summary**
Executive Salesforce ☆ ...
- Website Traffic Trends**
Google Analytics ☆ ...

Tableau interface showing the 'Sales' project page in 'Explore' mode. The navigation bar includes 'Content', 'Users', 'Groups', 'Schedules', and 'Tasks'. The page title is 'Sales' with owner 'Tristan Guillevin'. A 'Create' button and 'Select All' option are visible. Three dashboard thumbnails are shown: 'Sales Projection' (bar chart), 'Superstore' (Executive Overview - Profitability map), and another 'Superstore' (EXTRACT data refresh notification).

Tableau interface showing the 'Sales' project page in 'Home' mode. The navigation bar is the same. The page title is 'Sales PROJECT'. Below the title, there are counts for 'Projects 1', 'Workbooks 1', 'Views 9', 'Data sources 1', and 'Details'. A '+ New Workbook' button and '0 items selected' are present. A 'Sort by' dropdown is set to 'Views: All (Most-Least)'. A thumbnail of the 'Superstore' dashboard is shown with '0 views' and '0' star rating.



Publish Data Source to Tableau Server ✕

Project
Default ▼

Name
My Data Source ▼

Description

Tags
[Add](#)

Refresh Schedule (Full Extract)
Daily at noon (Every day at 12:00PM) ▼

Permissions
Same as project (Default) [Edit](#)

Authentication
Allow refresh access [Edit](#)

More Options
 Update workbook to use the published data source

ⓘ Allowing refresh access embeds credentials for that connection. Publish

World Indicators 📄 📄 ⋮
DATA SOURCE • By Tristan Guillevin • 0 views • ☆ 0 • Extract: Aug 20, 2018, 11:04 PM

Connections 1 **Refresh Schedules** 0 Connected Workbooks 0 Details

[+ New Extract Refresh](#)

| Refresh type | Sche |
|--------------|------|
| | |

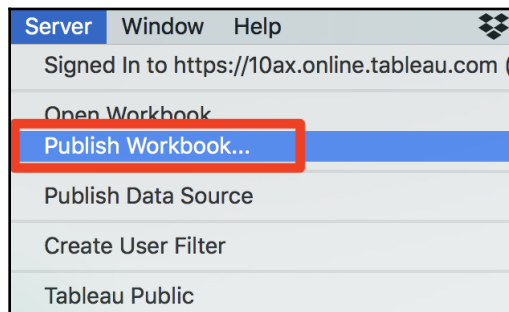
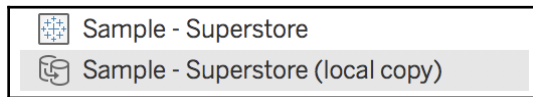
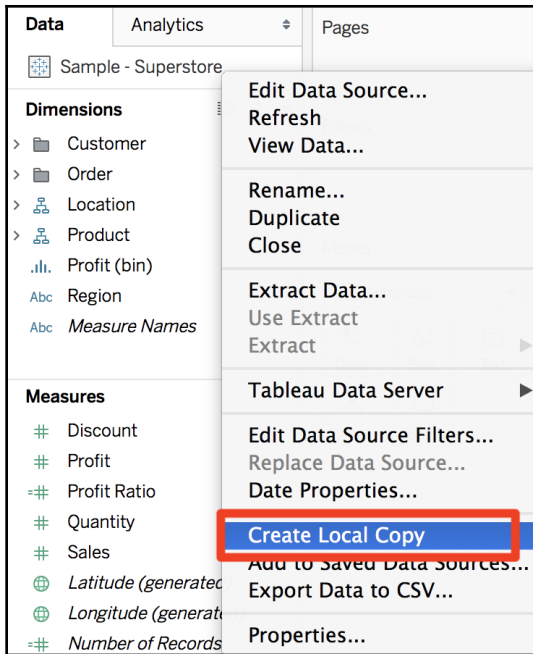
Refresh this extract on

World Indicators has been published to the server.

You can adjust permissions and other information for this data source.

Done

⋮ New Extract



Publish Workbook to Tableau Server

Project
Default

Name
My Workbook

Description

Tags
[Add](#)

Refresh Schedule (Full Extract)
Daily at noon (Every day at 12:00PM)

Sheets
2 of 19 selected [Edit](#)

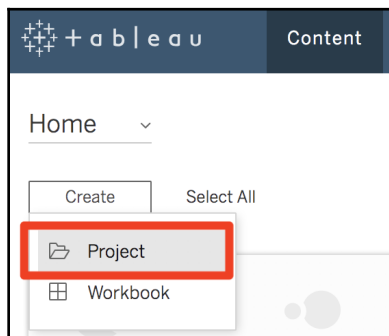
Permissions
Same as project (Default) [Edit](#)

Data Sources
19 embedded in workbook [Edit](#)

More Options

Show sheets as tabs
 Show selections
 Include external files

[Publish](#)



+ a b | e a u Content Users

Projects 2 **Workbooks** 5 **Views** 18

+ New Project ▾ 0 items selected

+ a b | e a u Content Users Groups Schedules

Home / World Indicators Tutorial / World Indicators

World Indicators

DATA SOURCE • By *Tristan Gulleivin* • 0 views • ☆ 0 • Extract: Aug 21, 2018

Connections 1 **Refresh Schedules** 0 Connected Workbooks 0

+ New Extract Refresh ▾ 0 items selected

Publishing Complete ✕

World Indicators has been published to the server.

You can adjust permissions and other information for this data source.

Home / World Indicators Tutorial / World Indicators

World Indicators

WORKBOOK • By *Tristan Gulleivin* • 0 views • ☆ 0

Views 8 Data Sources 1 Subscriptions 0 Details

▾ 0 items selected Sort by Sheet (First-Last) ▾

Population and Birth Rate (2012)

Population
0 views ☆ 0

Health Indicators

Health Indicators
0 views ☆ 0

Which Countries Spend More Than 14% of GDP on Healthcare?

Care Spend
0 views ☆ 0

Internet and Mobile Phone Usage per Capita

Technology
0 views ☆ 0

The data source will be replaced in all worksheets and dashboards.

Current:

Replacement:

A screenshot of a data source menu. The menu items are: Population 15-64, Population 65+, Population Total, Population Urban, GDP per Capita (highlighted), Latitude (generated), and Longitude (generated). The 'Folders' option is selected, opening a sub-menu with options: Add to Folder, Create Folder..., and Describe... The 'Add to Folder' option is further expanded to show a list of folders: Business, Development, Health, and Population.

Project

Name

Data source name is already in use. Publishing will overwrite the existing data source.

Description

Home > World Indicators Tutorial > World Indicators

World Indicators
 WORKBOOK • By Tristan Guillevin • 13 views • ☆ 0

Views 9 Data Sources 1 Subscriptions 0 Details

▼ 0 items selected Sort by Sheet (First-Last)

Population
0 views ☆ 0

Health Indicators
0 views ☆ 0

Care Spend
0 views ☆ 0

Technology
1 view ☆ 0

Economy
0 views ☆ 0

Tourism
3 views ☆ 0

Business
0 views ☆ 0

Global Indicators
0 views ☆ 0

Device Layout Test
9 views ☆ 0

Custom Views ✕

Europe, starting in 2005 Save

Make it my default Make it public

My Views

Europe, starting in 2005 (default)

Other Views

Original
Tristan Guillevin

Manage

Close

Send email if 'SUM(Tourism Inbound)' is:

| Condition | Threshold |
|-------------------|-------------------|
| Above or equal to | 1,250,000,000,000 |

Condition currently true

Subject

Data alert - Tourism income above \$1,250B ¶

When the condition is true, send email:

Once—the first time it's true

Recipients

Tristan Guillevin ×

Recipient name or username

Create Alert



no-reply

à moi

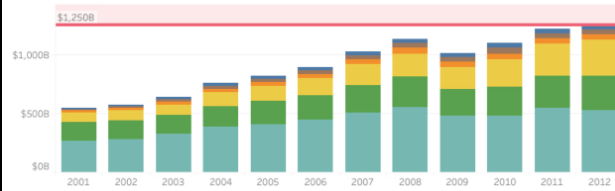
17:13 [Afficher les détails](#)

SUM(Tourism Inbound) was above or equal to 1,250,000,000,000.

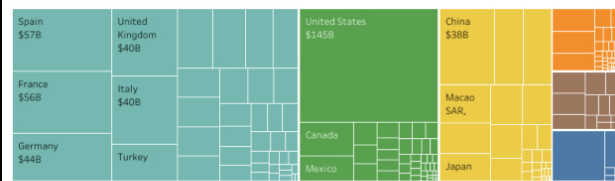
International Tourism

■ Oceania ■ Middle East ■ Africa ■ Asia ■ The Americas ■ Europe

Income By Region



Income by Region and Country



[Manage my alerts](#) | [Remove me from this alert](#) | [Add me to this](#)

Subscribe

Subscribe Users
Tristan Guillevin + 2

Subscribe Users in Groups
Top Management

Include
Entire Workbook ▼

Schedule
5 days a week, at 10:00 ▼

Subject
Tourism

Message
Daily Sales update





Don't send if view is empty

Subscribe me

Manage

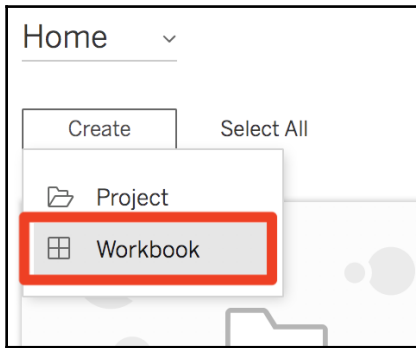
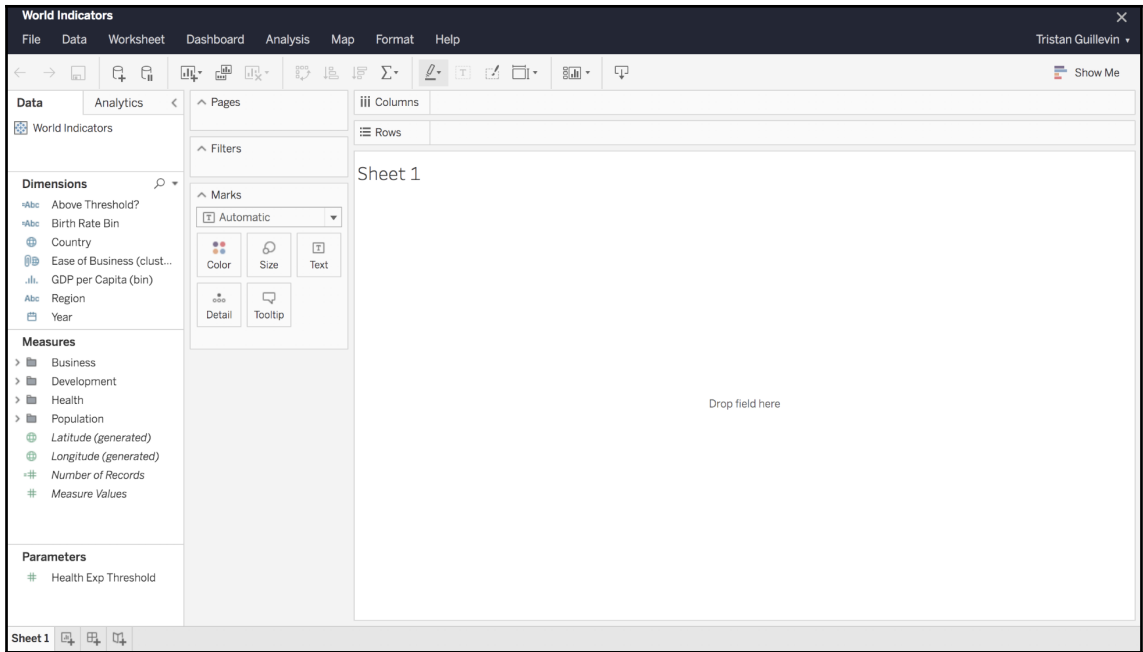
Cancel **Subscribe**

Home / World Indicators Tutorial / World Indicators

 **World Indicators**   

DATA SOURCE • By Tristan Guillevin • 42 views • ☆ 0 • Extract: Aug 21, 2018, 9:36 AM

Connections 1 Refresh Schedules 0 Connected Workbooks 1 Details

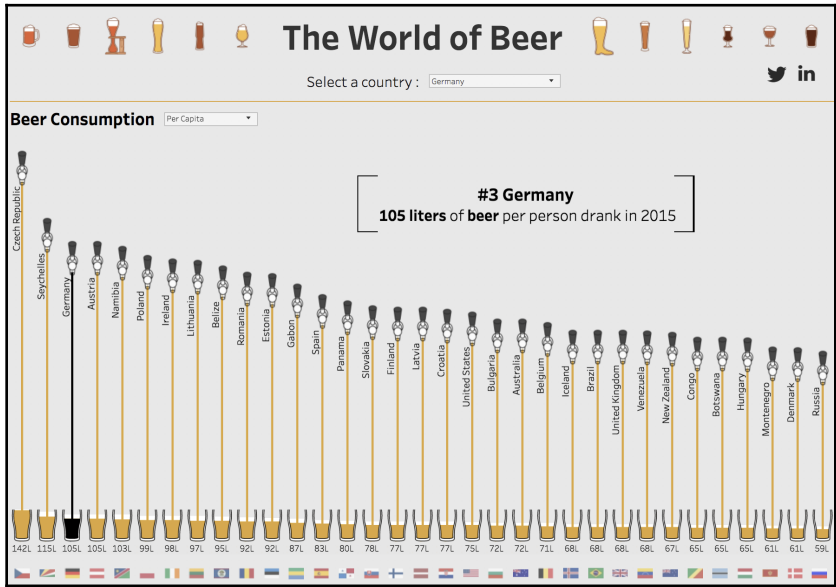


Projects 2 **Workbooks 1**



+ New Workbook ▾ 0 items selected

Population and Birth Rate (2012)

World Indicators
43 views ☆ 0



The World of Beer


Select a country :  

Germany

Beer Consumption

Per Capita

#3 Germany
105 liters of beer per person
 drank in 2015



| | | | | | |
|----------------|------------|---------|---------|---------|--------|
| 142L | 115L | 105L | 105L | 103L | 99L |
| Czech Republic | Seychelles | Germany | Austria | Namibia | Poland |

Beer Production

#4 Germany
9,562M liters of beer produced in

Device Preview Device type: Default Desktop Tablet Phone

Model: Generic Tablet (1024 x 768)  Tableau Mobile app Add Tablet Layout

Dashboard Layout ▾

Default
Phone ...

Device Preview

Size - Phone

Default
 Fit all
 Fit width

Height

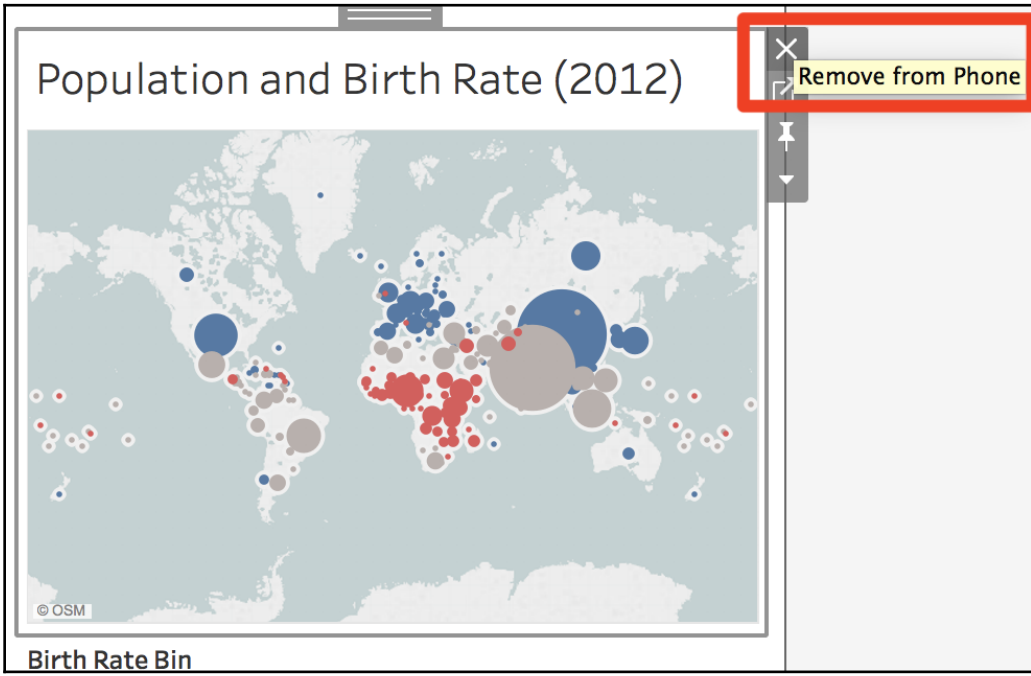
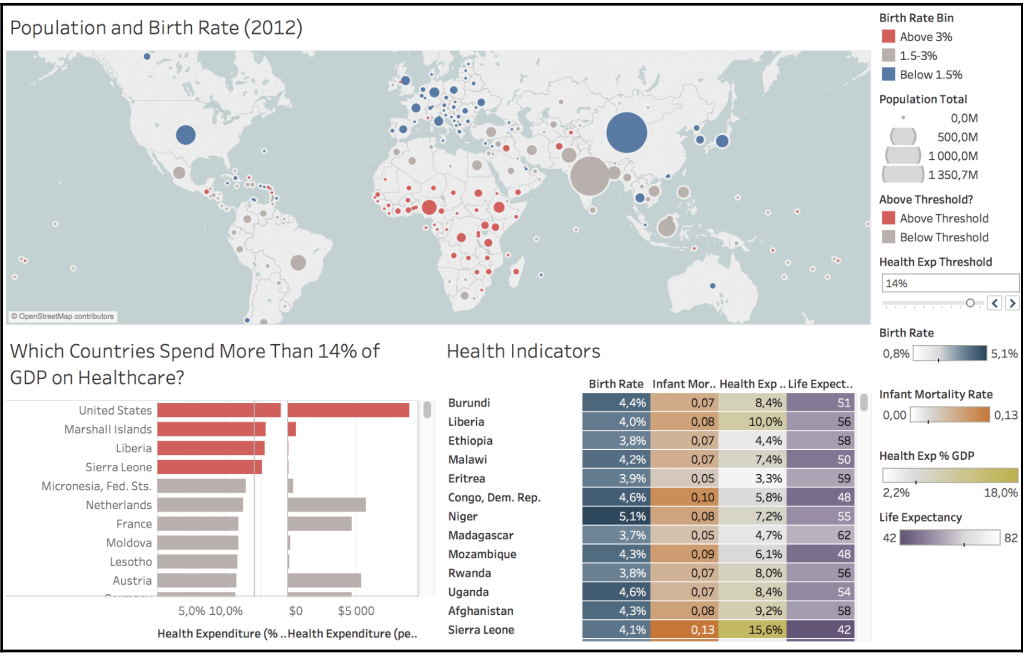
Layout - Phone

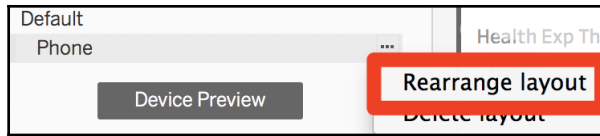
- Population
- Birth Rate Bin
- Population Total
- Health Indicators
- Birth Rate

Find: ▾ 🔍 📅

| Name | Owner | Project | Modified | Size |
|------------------|------------------|---------------------------|-----------------|-------|
| World Indicators | Tristan Guill... | World Indicators Tutorial | Today, 10:33 AM | 33... |

Name:



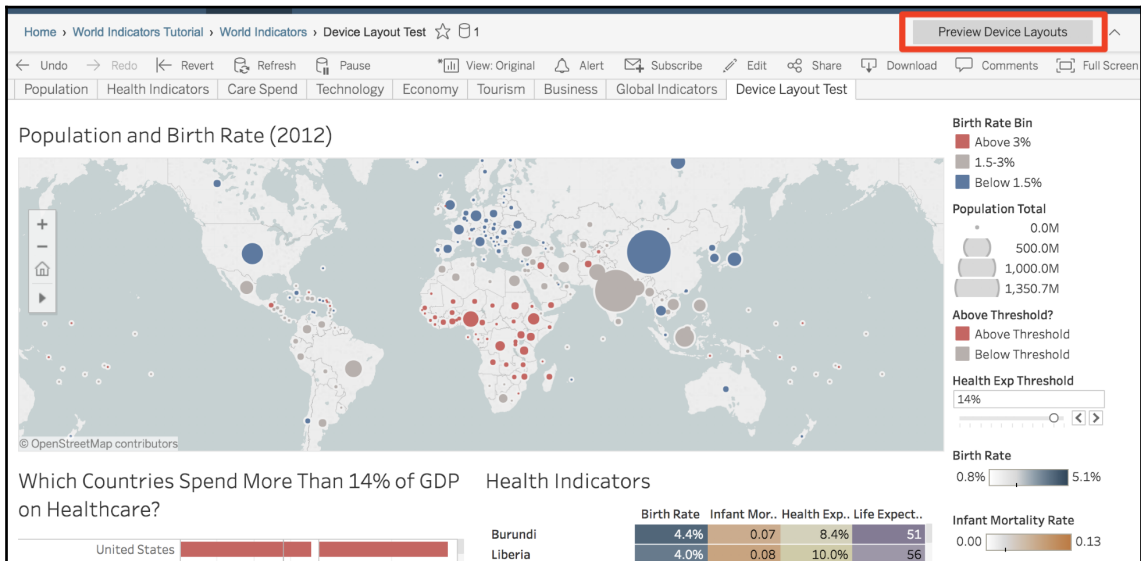


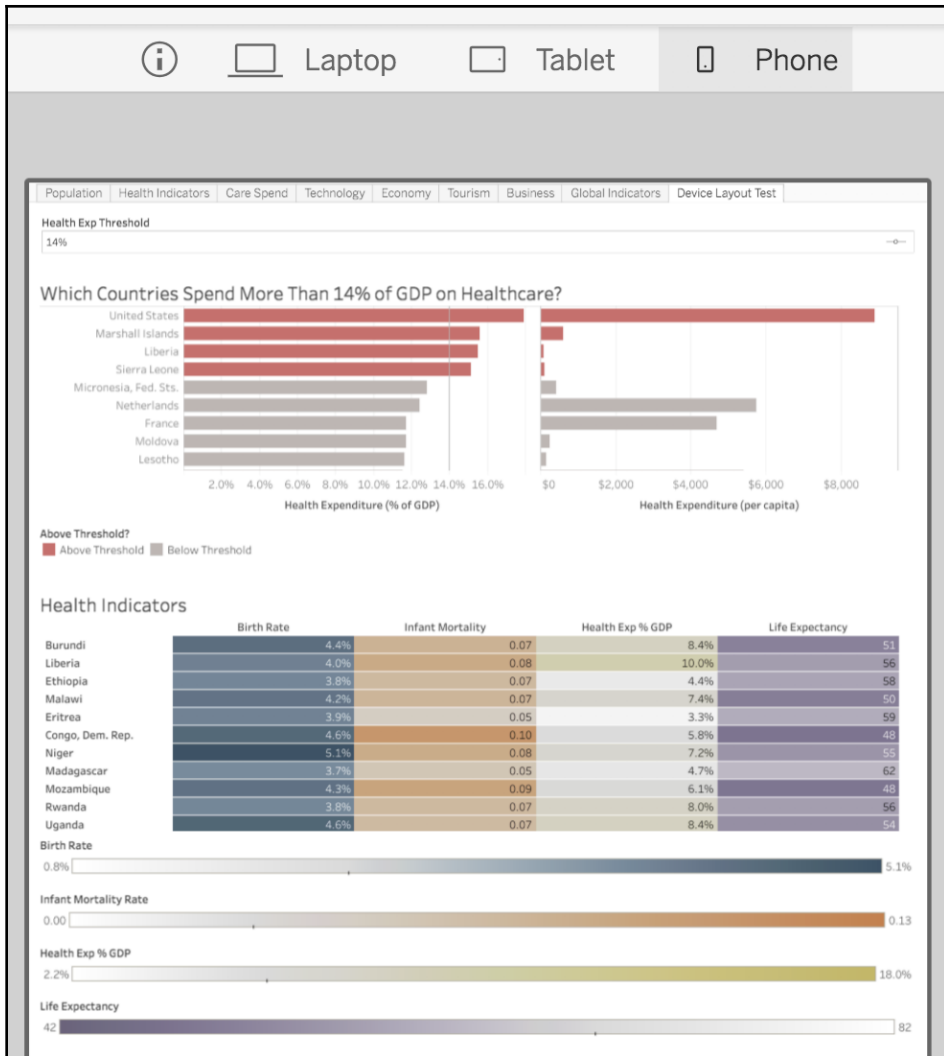
Project
World Indicators Tutorial

Name
World Indicators

Workbook name is already in use. Publishing will overwrite the existing workbook.

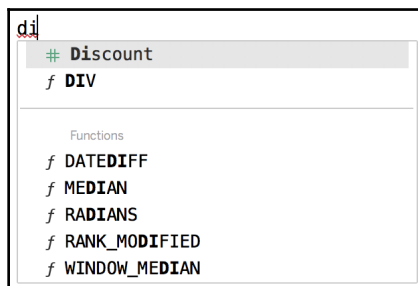
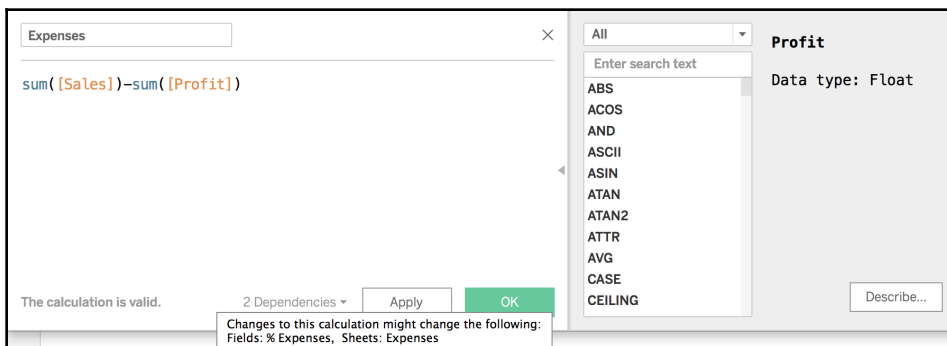
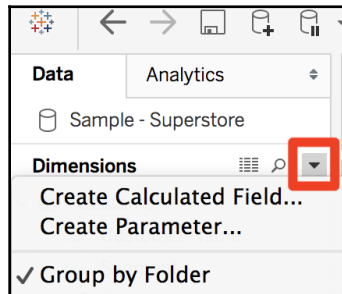
Description





Chapter 10: An Introduction to Calculations

=# Profit Ratio
Quantity



Marks

Automatic

Color Size Text

Detail Tooltip

AGG(Profit Ratio)

Profit Ratio

$SUM([Profit])/SUM([Sales])$

Pages

Columns

Rows

Measure Names

Filters

Measure Names

Marks

Automatic

Color Size Text

Detail Tooltip

Measure Values

Expenses

| | |
|--------------------|-----------|
| Profit | \$286 397 |
| Sales | 2 297 201 |
| Profit Ratio | 12% |
| Wrong Profit Ratio | 120242% |

Measure Values

SUM(Profit)

SUM(Sales)

AGG(Profit Ratio)

SUM(Wrong Profit Ratio)

Number

Enter search text

MAX

MIN

PI

POWER

RADIANS

ROUND

SIGN

SIN

SQRT

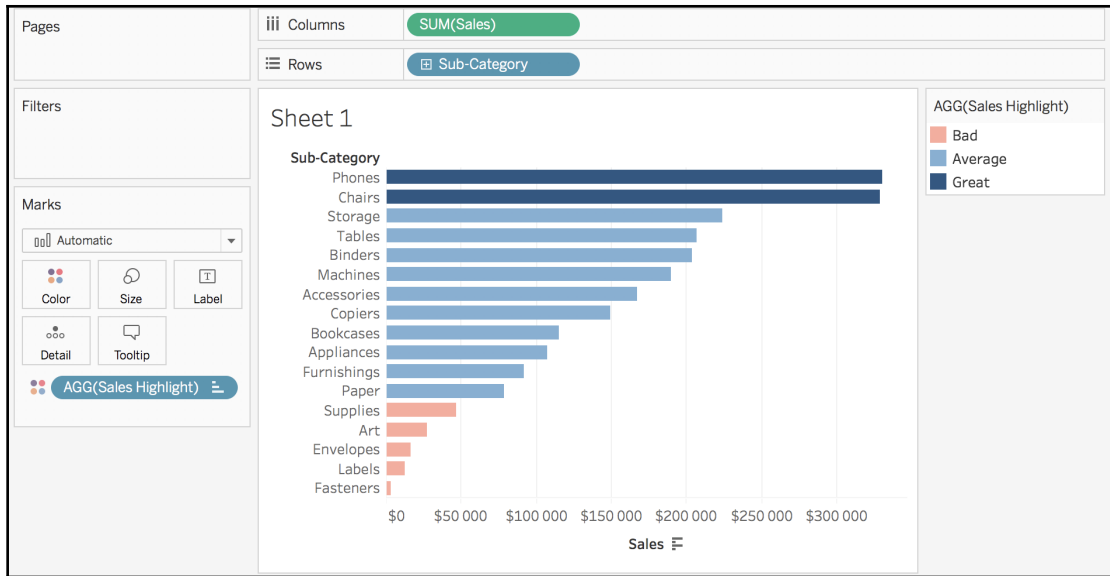
SQUARE

TAN

ROUND(number, [decimals])

Rounds a number to the nearest integer or to a specified number of decimal places.

Example: $ROUND(3.1415, 1) = 3.1$



Pages

Columns: Measure Names

Rows: YEAR(Order Date), QUARTER(Order D..)

Filters: Measure Names

Marks: Measure Values

Measure Values: SUM(Quantity)

Sheet 1

| Year of Ord.. | Quarter of .. | Quantity | Rank | % of total | Moving Average | Difference | % Difference |
|---------------|---------------|----------|------|------------|----------------|------------|--------------|
| 2015 | 2015 Q1 | 1 028 | 15 | 2,71% | 1 028 | | |
| | 2015 Q2 | 1 523 | 13 | 4,02% | 1 276 | 495 | 48,15% |
| | 2015 Q3 | 2 159 | 10 | 5,70% | 1 570 | 636 | 41,76% |
| | 2015 Q4 | 2 871 | 5 | 7,58% | 2 184 | 712 | 32,98% |
| 2016 | 2016 Q1 | 990 | 16 | 2,61% | 2 007 | -1 881 | -65,52% |
| | 2016 Q2 | 1 604 | 12 | 4,24% | 1 822 | 614 | 62,02% |
| | 2016 Q3 | 2 241 | 8 | 5,92% | 1 612 | 637 | 39,71% |
| | 2016 Q4 | 3 144 | 4 | 8,30% | 2 330 | 903 | 40,29% |
| 2017 | 2017 Q1 | 1 243 | 14 | 3,28% | 2 209 | -1 901 | -60,46% |
| | 2017 Q2 | 2 240 | 9 | 5,91% | 2 209 | 997 | 80,21% |
| | 2017 Q3 | 2 767 | 6 | 7,31% | 2 083 | 527 | 23,53% |
| | 2017 Q4 | 3 587 | 2 | 9,47% | 2 865 | 820 | 29,63% |
| 2018 | 2018 Q1 | 1 845 | 11 | 4,87% | 2 733 | -1 742 | -48,56% |
| | 2018 Q2 | 2 551 | 7 | 6,74% | 2 661 | 706 | 38,27% |
| | 2018 Q3 | 3 384 | 3 | 8,94% | 2 593 | 833 | 32,65% |
| | 2018 Q4 | 4 696 | 1 | 12,40% | 3 544 | 1 312 | 38,77% |

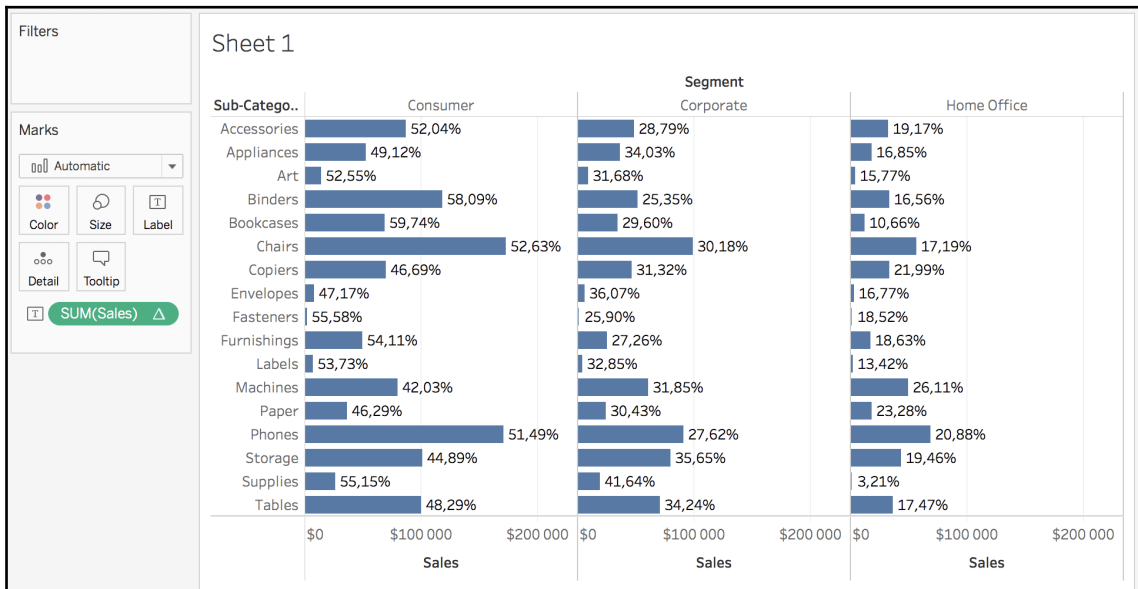
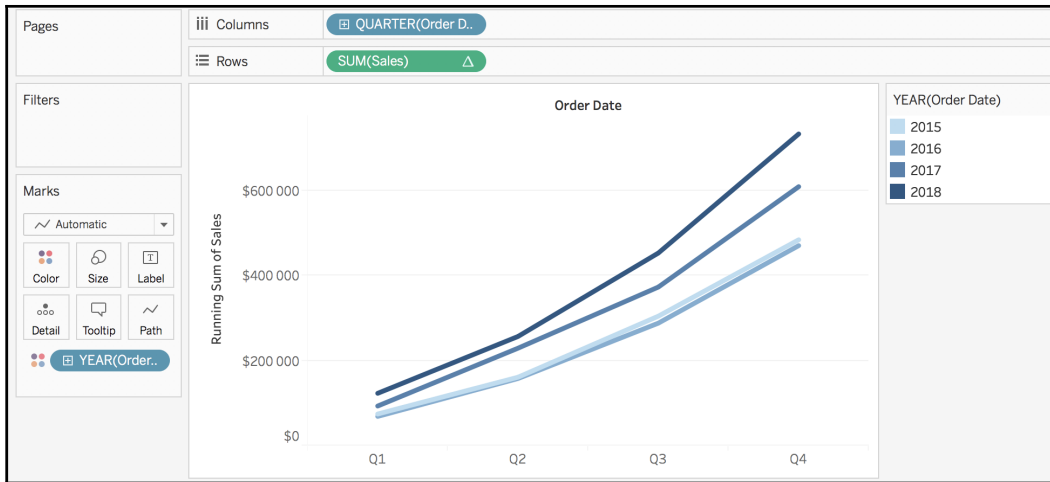
View Data: Sample - Superstore

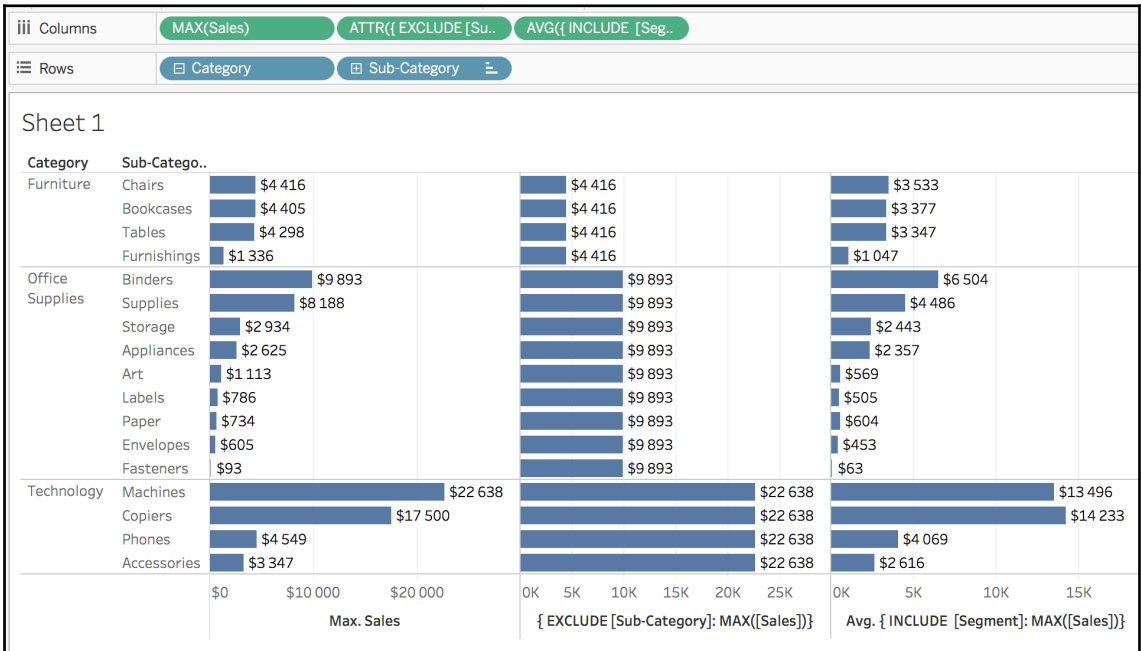
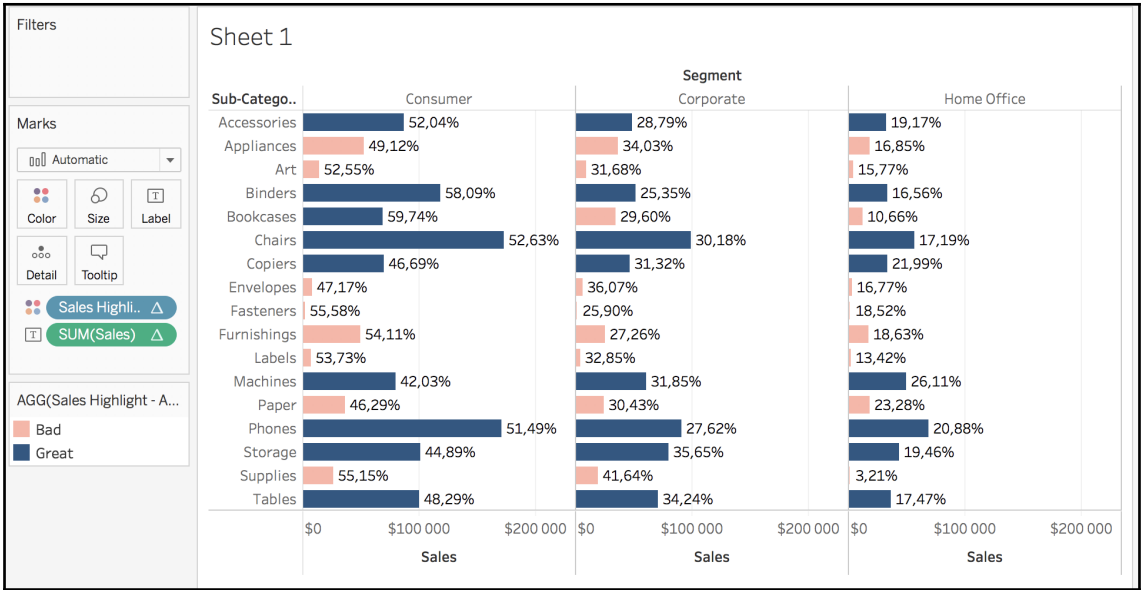
9 994 rows Show aliases Copy Export All

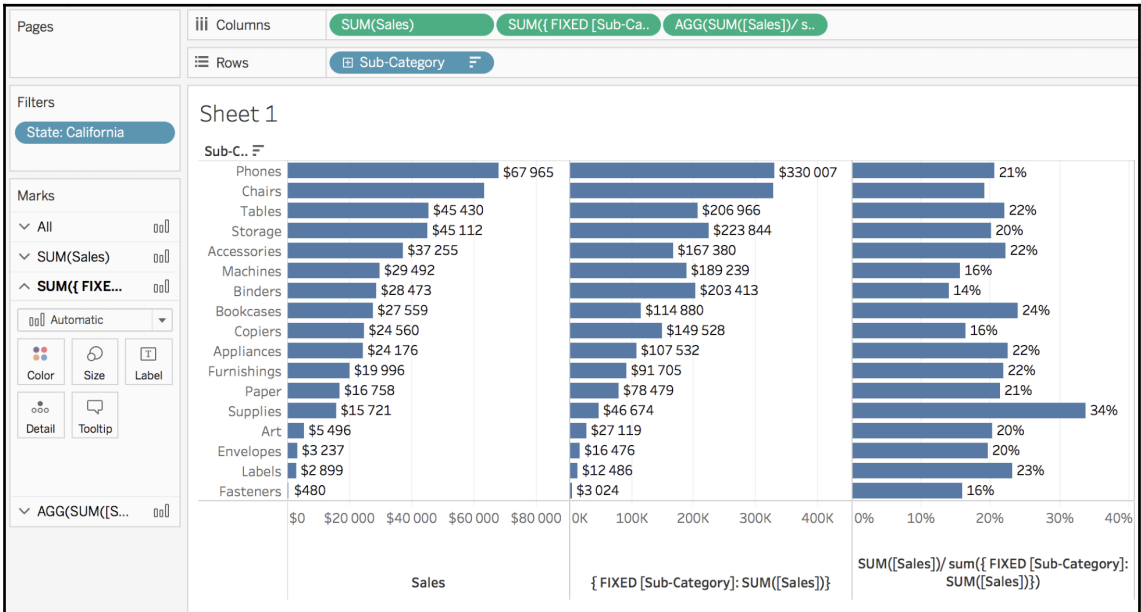
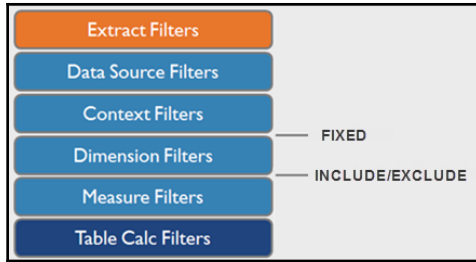
| Ship Mode | State | Sub-Category | Discount | Number of Records | Profit | Profit Ratio | Quantity | Sales | |
|-----------|----------------|--------------|-------------|-------------------|--------|--------------|----------|-------|---------|
| 017 | Second Class | Kentucky | Bookcases | 0% | 1 | \$42 | 16% | 2 | \$262 |
| 017 | Second Class | Kentucky | Chairs | 0% | 1 | \$220 | 30% | 3 | \$732 |
| 017 | Second Class | California | Labels | 0% | 1 | \$7 | 47% | 2 | \$15 |
| 016 | Standard Class | Florida | Tables | 45% | 1 | -\$383 | -40% | 5 | \$958 |
| 016 | Standard Class | Florida | Storage | 20% | 1 | \$3 | 11% | 2 | \$22 |
| 015 | Standard Class | California | Furnishings | 0% | 1 | \$14 | 29% | 7 | \$49 |
| 015 | Standard Class | California | Art | 0% | 1 | \$2 | 27% | 4 | \$7 |
| 015 | Standard Class | California | Phones | 20% | 1 | \$91 | 10% | 6 | \$907 |
| 015 | Standard Class | California | Binders | 20% | 1 | \$6 | 31% | 3 | \$19 |
| 015 | Standard Class | California | Appliances | 0% | 1 | \$34 | 30% | 5 | \$115 |
| 015 | Standard Class | California | Tables | 20% | 1 | \$85 | 5% | 9 | \$1 706 |
| 015 | Standard Class | California | Phones | 20% | 1 | \$68 | 8% | 4 | \$911 |

- Compute Using**
- Table (down)
 - Pane (down)
 - Pane (across then down)
 - Pane (down then across)
 - Cell
 - Order Date
- Edit Table Calculation...
 Clear Table Calculation
 Quick Table Calculation
 Remove









| Category | Target |
|-----------------|--------|
| Technology | 7000 |
| Office Supplies | 20000 |
| Furniture | 10000 |

← → 📄 🔄

Sample - Superstore

Connection
 Live Extract

Filters
 0 | [Add](#)

Orders — — Target

Show aliases Show hidden fields

Sort fields: Data source order

1 000 ⇒ rows

| # Orders Quantity | # Orders Discount | # Orders Profit | Abc Target Category (Target) | # Target Target | =# Calculation Profit Ratio | Group Manufacturer |
|-------------------------|-------------------------|-----------------------|------------------------------------|-----------------------|-----------------------------------|-----------------------|
| 2 | 0% | \$42 | Furniture | 10,000 | 16% | Bush |
| 3 | 0% | \$220 | Furniture | 10,000 | 30% | Hon |
| 2 | 0% | \$7 | Office Supplies | 20,000 | 47% | Universal |
| 5 | 45% | -\$383 | Furniture | 10,000 | -40% | Bretford |
| 2 | 20% | \$3 | Office Supplies | 20,000 | 11% | Eldon |
| 7 | 0% | \$14 | Furniture | 10,000 | 29% | Eldon |
| 4 | 0% | \$2 | Office Supplies | 20,000 | 27% | Newell |

Connections Add

Superstore with Traget
Microsoft Excel

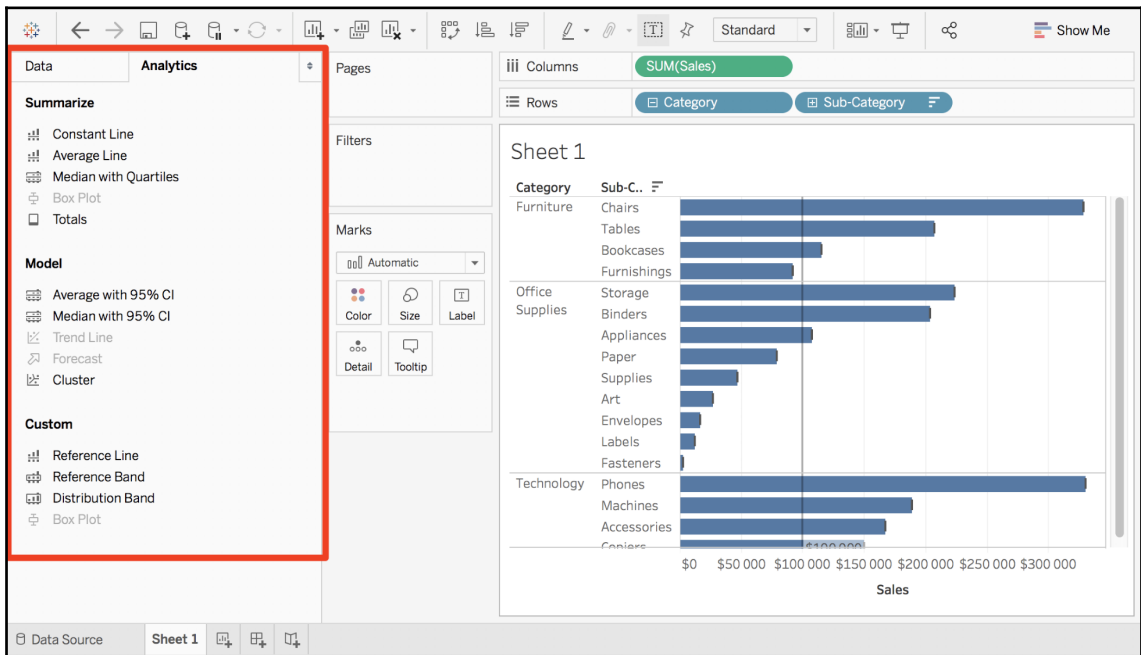
Sheets 🔍

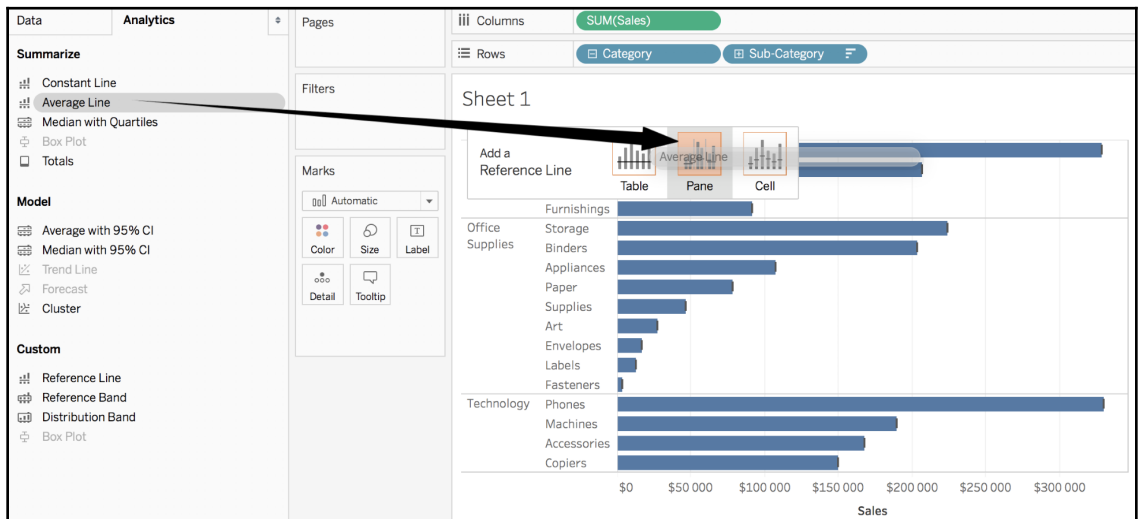
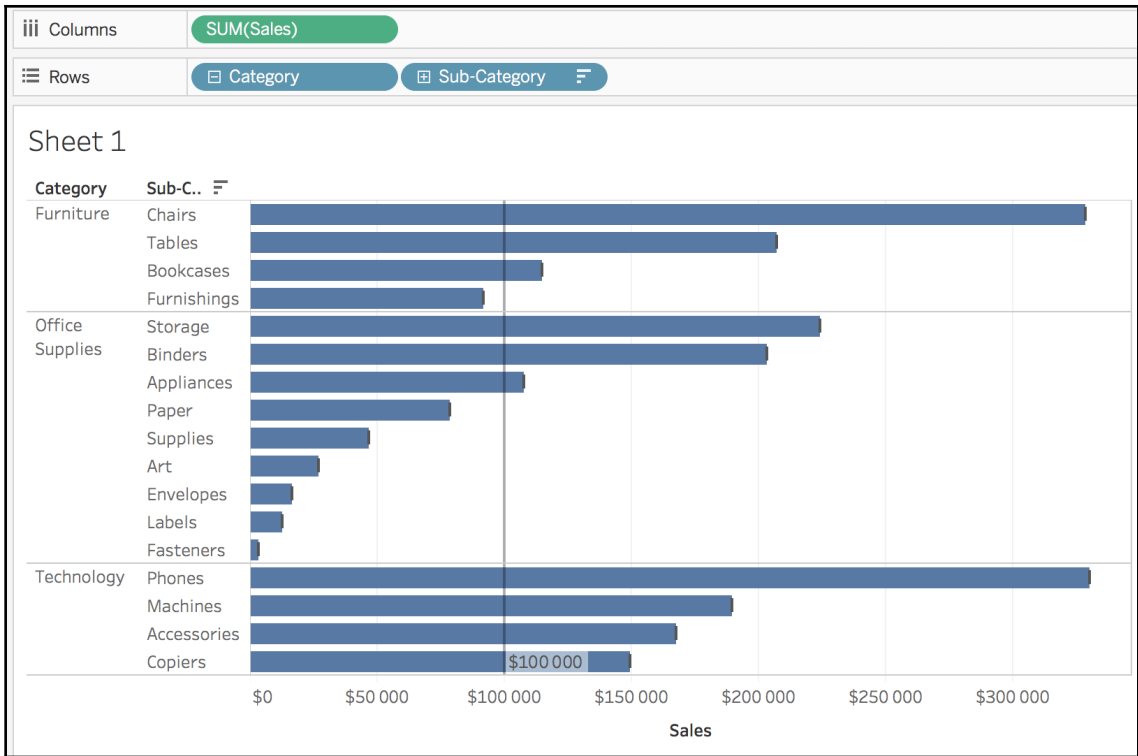
Use Data Interpreter
Data Interpreter might be able to clean your Microsoft Excel workbook.


Orders
 Target
 Orders


New Union


Chapter 11: Analytics and Parameters







Line


Band


Distribution


Box Plot

Scope

Entire Table Per Pane Per Cell

Line

Value:

Label:

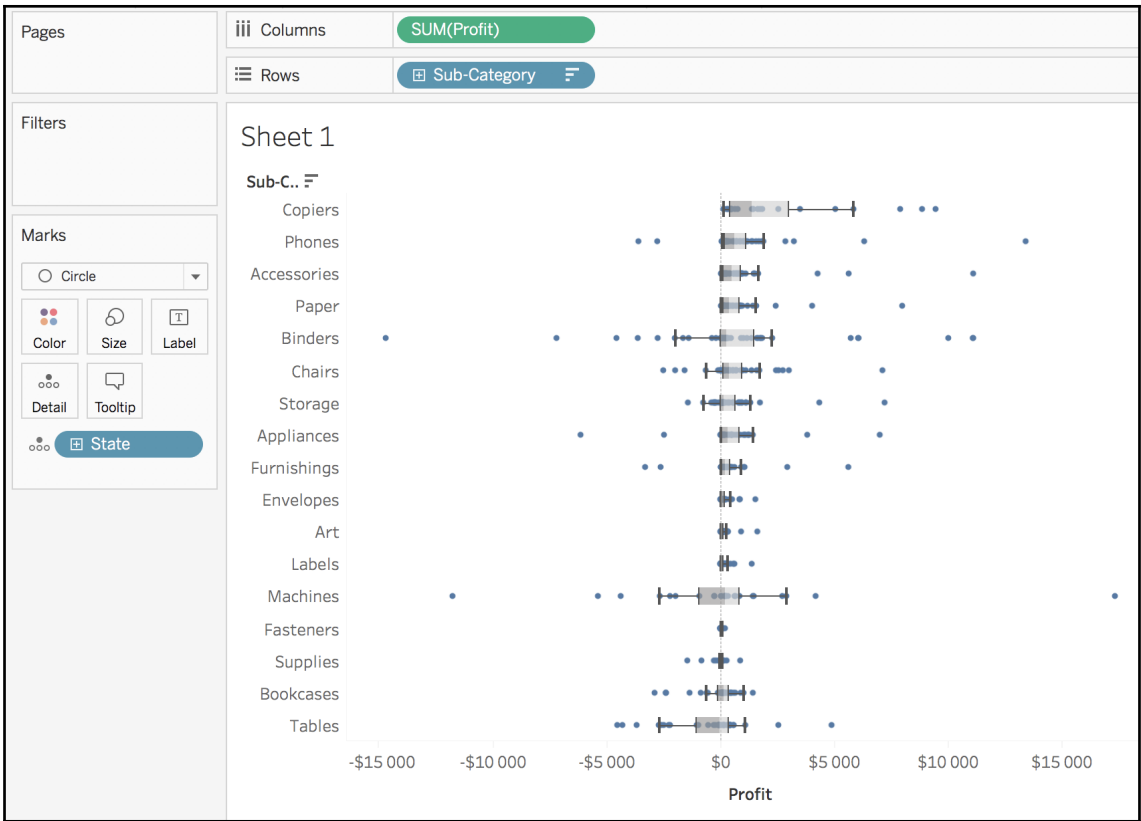
Formatting

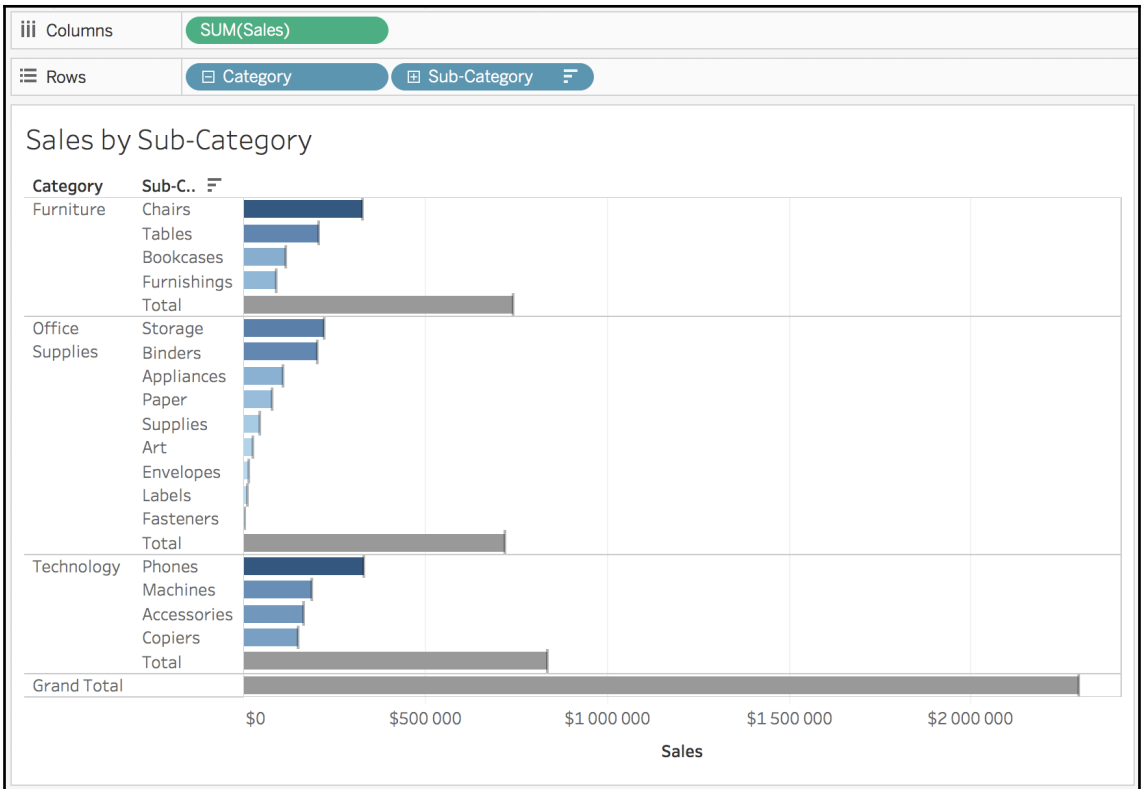
Line:

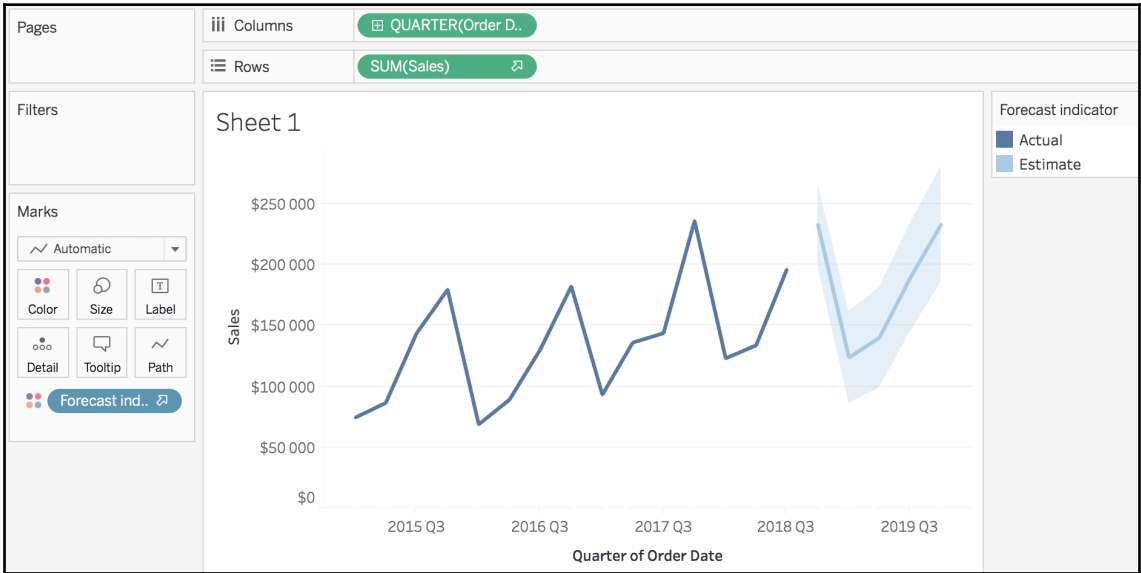
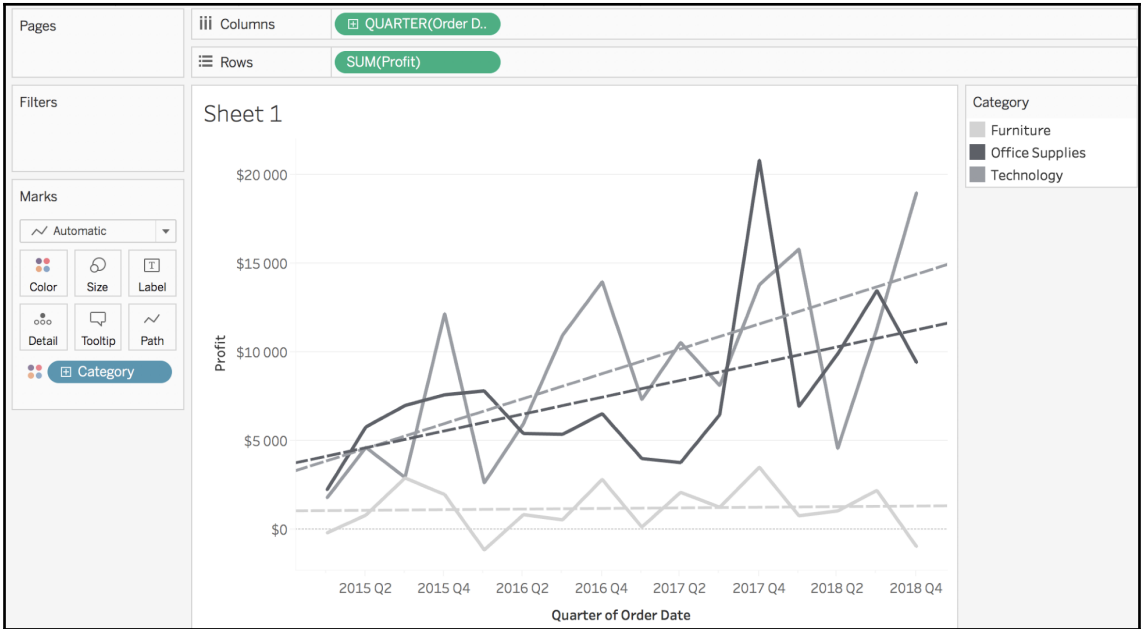
Fill Above:

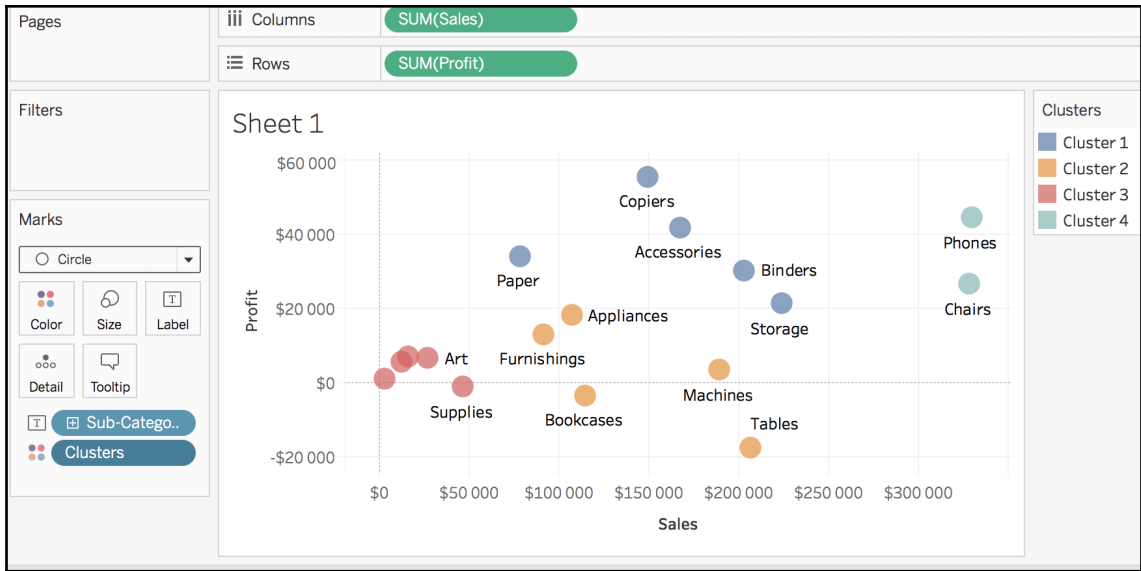
Fill Below:

Show recalculated line for highlighted or selected data points









Add Reference Line, Band, or Box

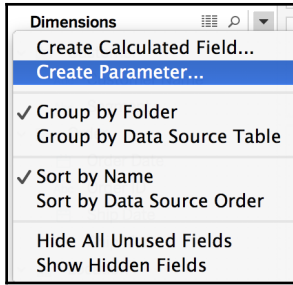
Line Band Distribution Box Plot

Scope
 Entire Table Per Pane Per Cell

Line
 Value: SUM(Profit) Average
 Label: Computation
 Line only 95

Formatting
 Line: _____
 Fill Above: None
 Fill Below: None

Show recalculated line for highlighted or selected data points



Name:

Properties

Data type:

Current value:

Display format:

Allowable values: All List Range

Range of values

Minimum:

Maximum:

Step size:

List of values

| Value | Display As |
|--------|--------------------------|
| value1 | This is the first v... |
| value2 | This is the second value |
| Add | |
| | |
| | |
| | |
| | |

Range of values

Minimum: 1

Maximum: 1 000

Step size: 10

My Parameter ▼

Edit Parameter...

Show Title

Edit Title...

Format Parameters...

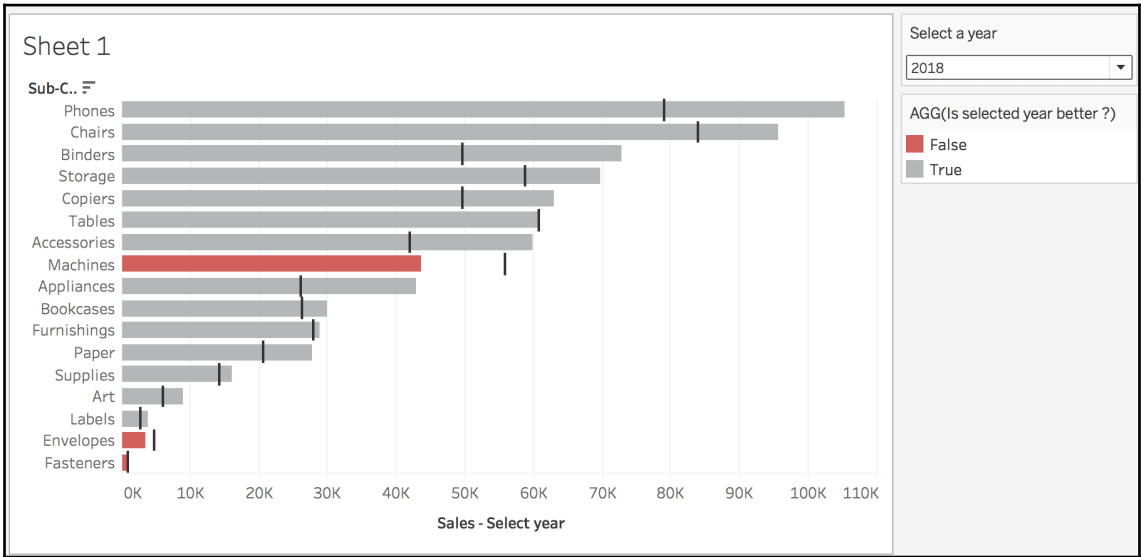
Single Value List

Compact List

Slider

Type In

× Hide Card



Name: Comment >>

Properties

Data type:

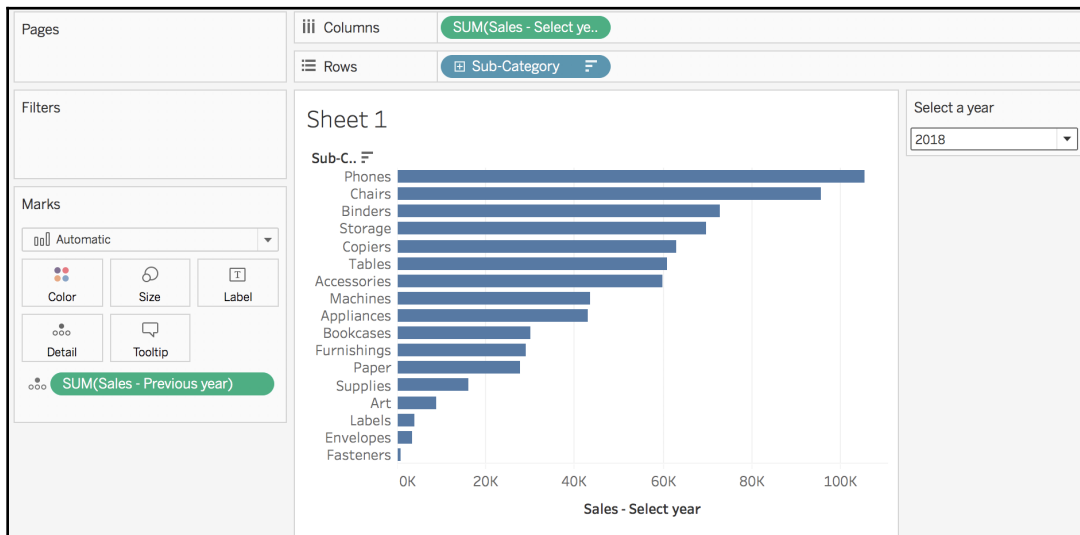
Current value:


Display format:


Allowable values: All List Range


List of values


| Value | Display As |
|-------|------------|
| 2 015 | 2015 |
| 2 016 | 2016 |
| 2 017 | 2017 |
| 2 018 | 2018 |
| Add | |
| | |
| | |
| | |




Line


Band


Distribution


Box Plot

Scope

Entire Table
 Per Pane
 Per Cell

Line

Value:

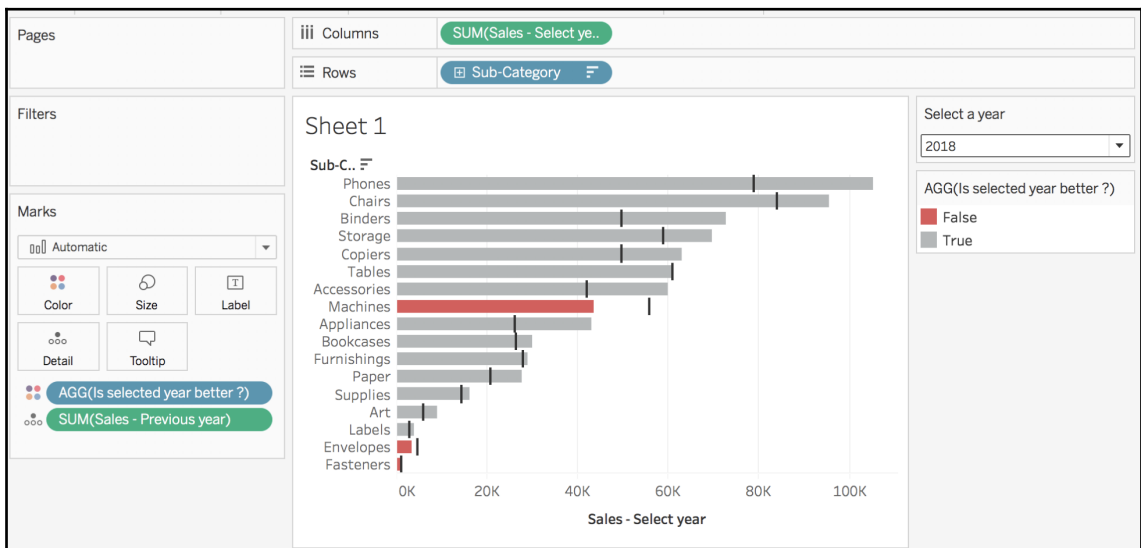
Label:

Formatting

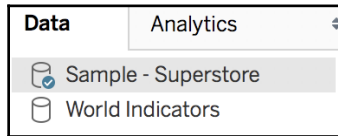
Line:

Fill Above:

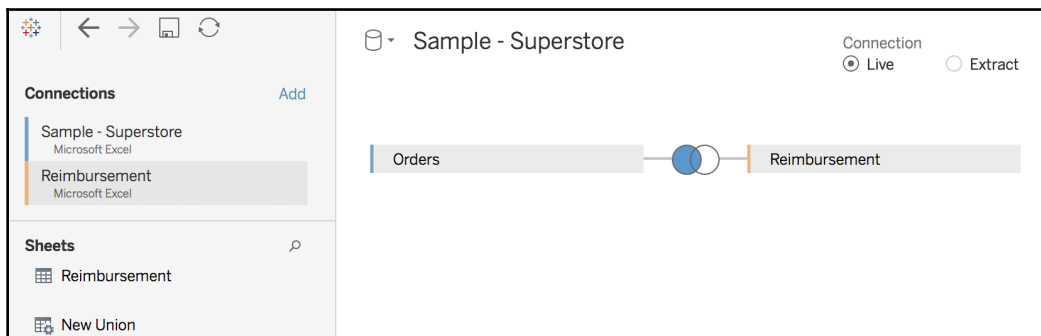
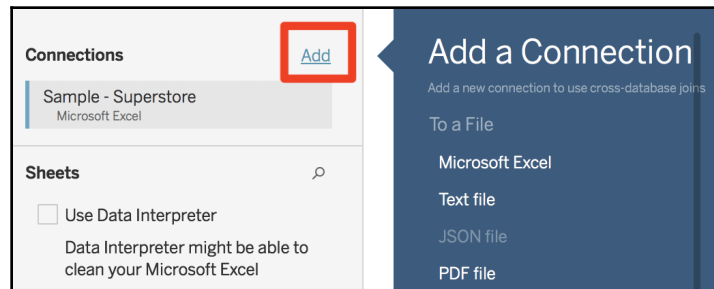
Fill Below:

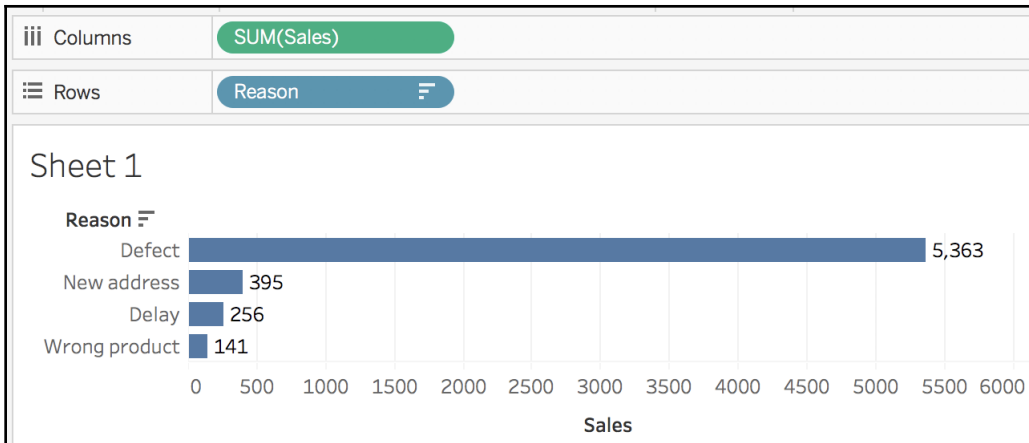


Chapter 12: Advanced Data Connections



| Order ID | Reimbursed | Reason |
|----------------|------------|---------------|
| CA-2015-115812 | y | Defect |
| CA-2017-152156 | y | Defect |
| CA-2017-111682 | y | Defect |
| CA-2017-145583 | y | Delay |
| CA-2017-130162 | n | New address |
| US-2017-123470 | y | Wrong product |





Sample - Superstore

Target (Target)

Dimensions

- Order Date
- Order Number

Measure Names

| Year | Target |
|------|--------|
| 2015 | 500000 |
| 2016 | 500000 |
| 2017 | 500000 |
| 2018 | 700000 |

Navigation icons: Home, Back, Forward, Refresh, etc.

Data | Analytics

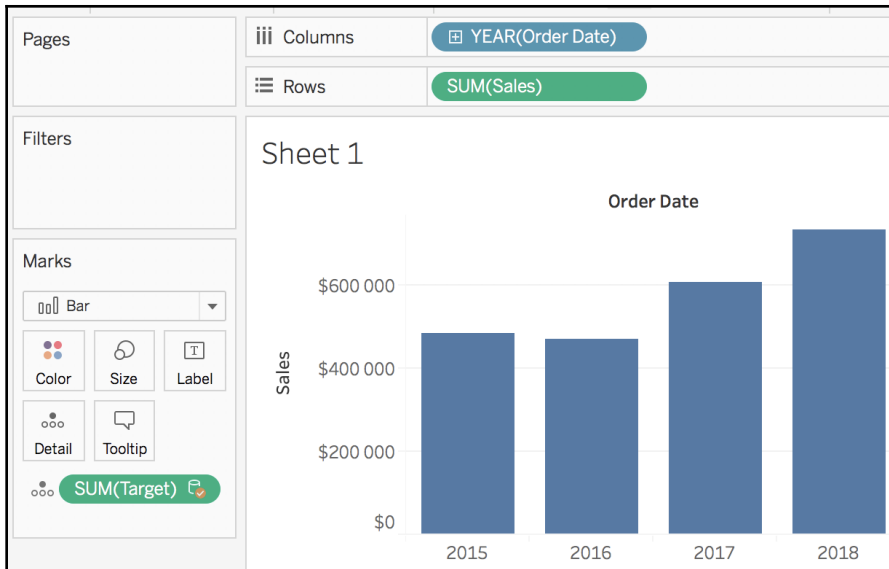
- Sample - Superstore
- Target (Target)

Dimensions

- Order
 - Order Date
 - Order ID

Pages

Filters



Relationships determine how data from secondary data sources are joined with primary data sources.

Primary data source:

Sample - Superstore

Secondary data source:

Target (Target)

Automatic Custom

| | | |
|--|--|--|
| | | |
| | | |
| | | |

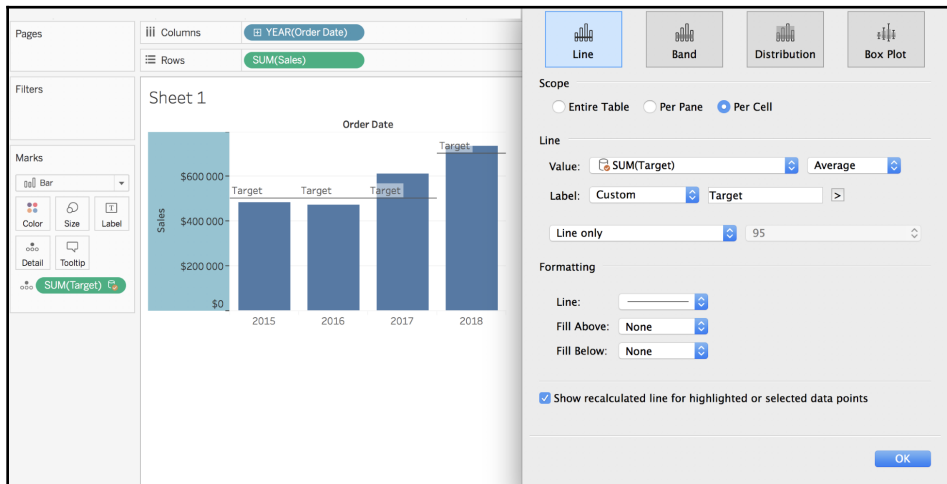
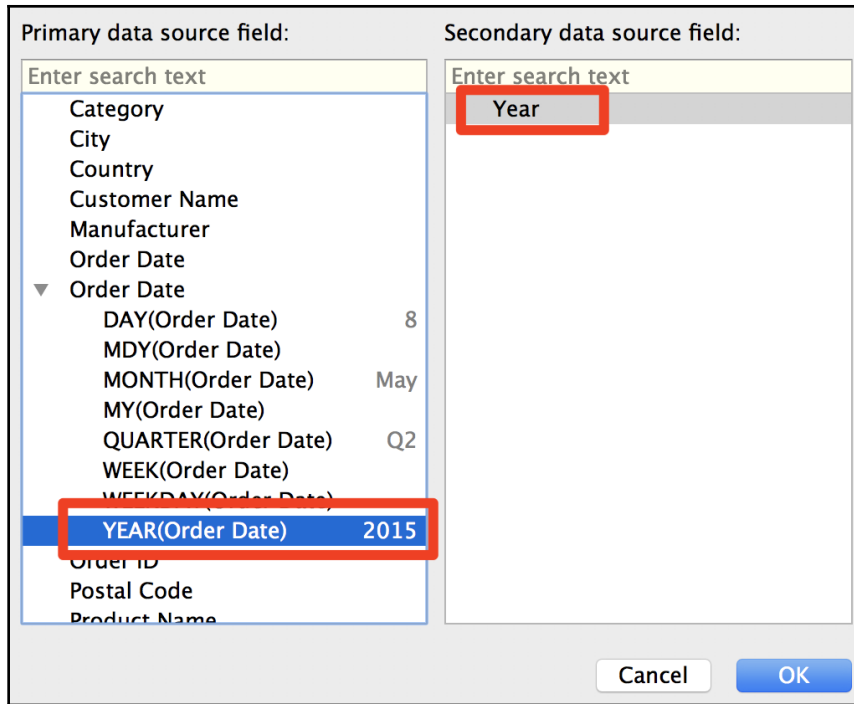
Add...

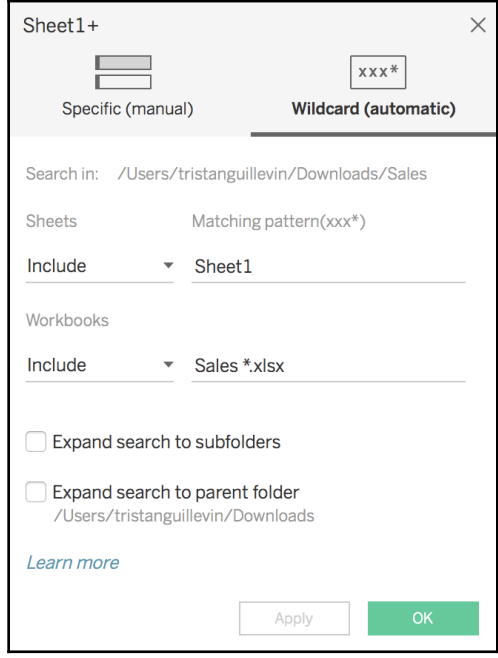
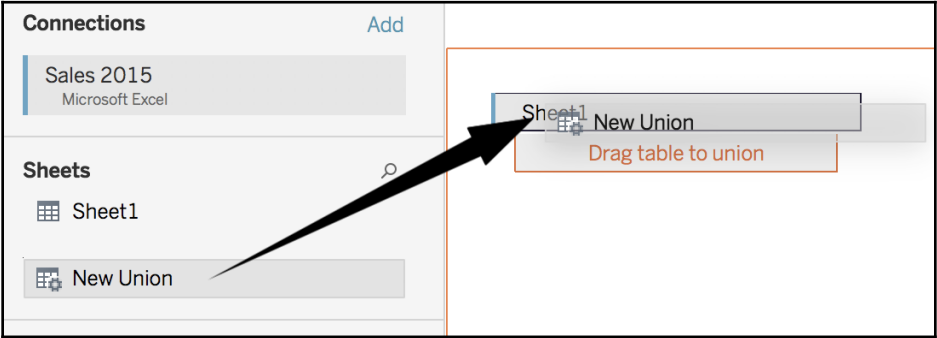
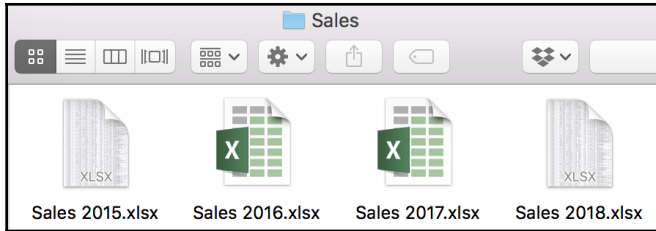
Edit...

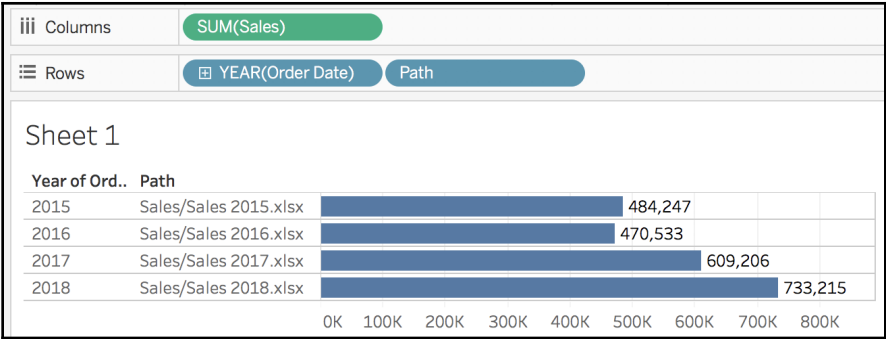
Remove

Cancel

OK







Chapter 13: Deal with Security

Permissions

Edit permissions for the project "Sales".

Search for a user to view their permissions

Workbook and data sources permissions are currently unlocked. Edit Content Permission

| User / Group | Project » | Workbooks » | Data Sources » |
|----------------------------|----------------|---|--|
| All Users (4) ... | Viewer | Interactor <i>Managed by the owner</i> | Connector <i>Managed by the owner</i> |
| .johnsnow@examp... ... | Viewer | Interactor | Connector |
| .williamplayfair@ex... ... | Publisher | Editor | Connector |
| Tristan Guillevin ... | Project Leader | Editor | Editor |

+ Add a user or group rule

Search for a user to view their permissions

User

.charlesminard@example.com

.johnsnow@example.com

.williamplayfair@example.com

to view user permissions.

Search for a user to view their permissions

Workbook and data sources permissions are currently unlocked. Edit Content Permissions

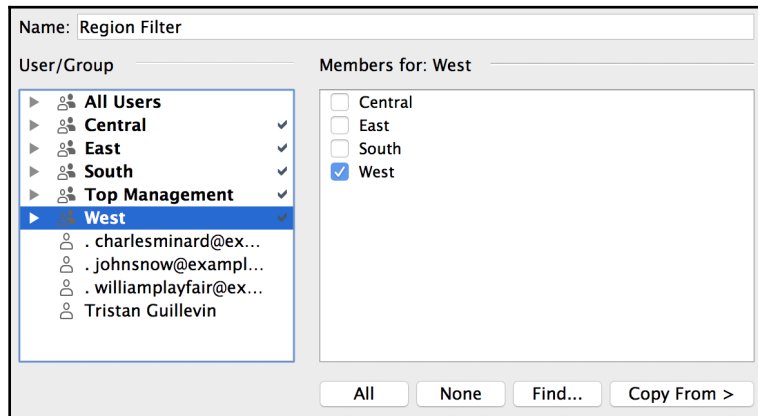
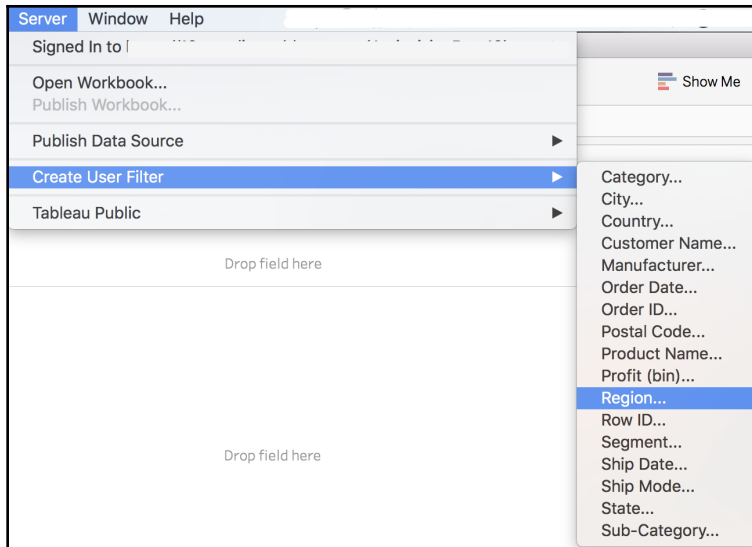
| User / Group | Project » | Workbooks | View | Interact/Edit | Edit | Data Sources » |
|-------------------------------|-----------|------------|------|---------------|------|----------------|
| All Users (4) ... | Viewer | Viewer | View | Interact/Edit | Edit | Connector |
| .johnsnow@examp... ... | Viewer | Viewer | View | Interact/Edit | Edit | Connector |
| .williamplayfair@examp... ... | Publisher | Interactor | View | Interact/Edit | Edit | Connector |
| Project Leader | Viewer | Viewer | View | Interact/Edit | Edit | Editor |

Cancel Save

+ Add a user or group rule Enter a user name

User Permissions .williamplayfair@example.com

User



The screenshot displays the Tableau Desktop interface for a worksheet named "Sheet 1". The main view shows a visualization with two columns: "Longitude (generated)" and "Latitude (generated)". The interface is organized into several panes:

- Data:** Sample - Superstore
- Dimensions:** Ship Mode, Location, Country, State
- Measures:** Discount, Profit, Profit Ratio, Quantity
- Sets:** Region Filter, Top Customers by Profit
- Parameters:** Profit Bin Size, Top Customers
- Filters:** Region Filter
- Marks:** Automatic (SUM(Sales)), Color, Size, Label, Detail, Tooltip

The user's name, "Tristan Guillevin", is visible in the bottom right corner of the interface.

Pages

Filters

Region Filter

Marks

Automatic

Color Size Label

Detail Tooltip

SUM(Sales)

Country

State

State

Columns Longitude (generated)

Rows Latitude (generated)

Sheet 1

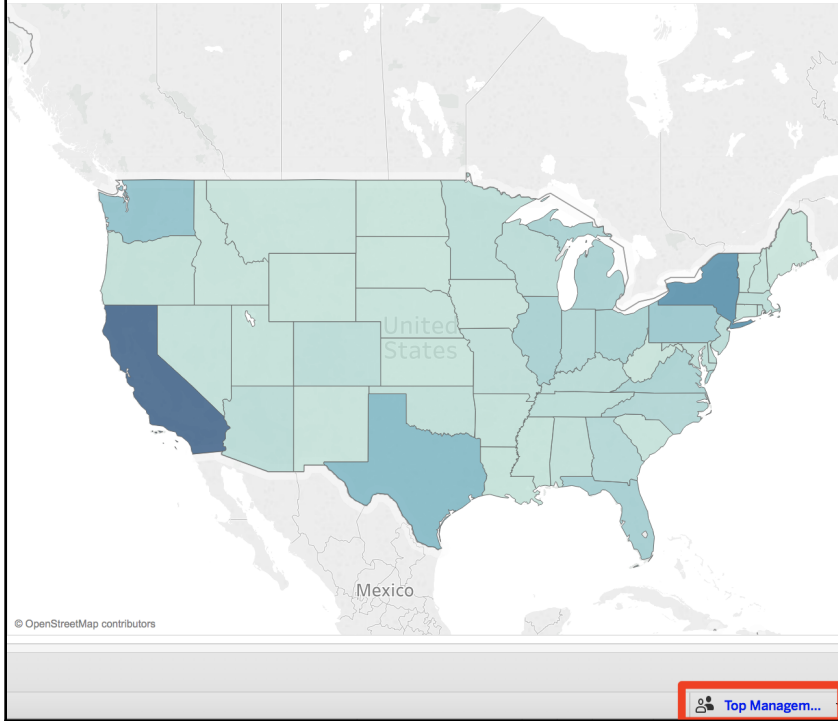
© OpenStreetMap contributors

Filter as User [Reset](#)

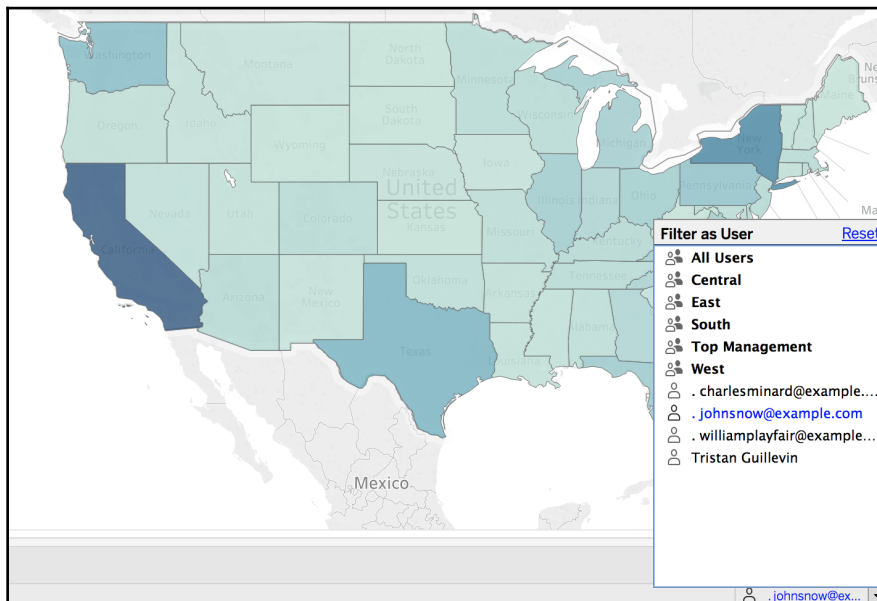
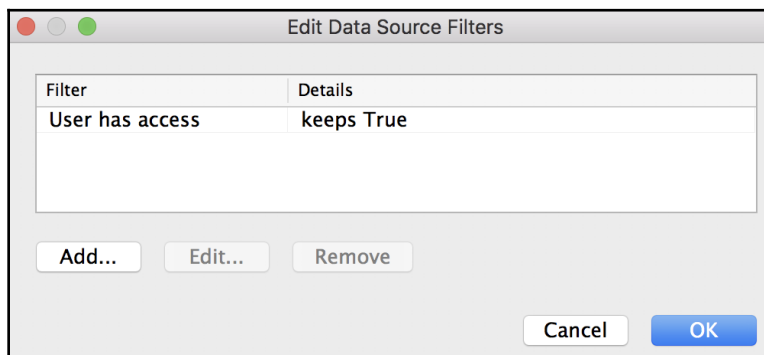
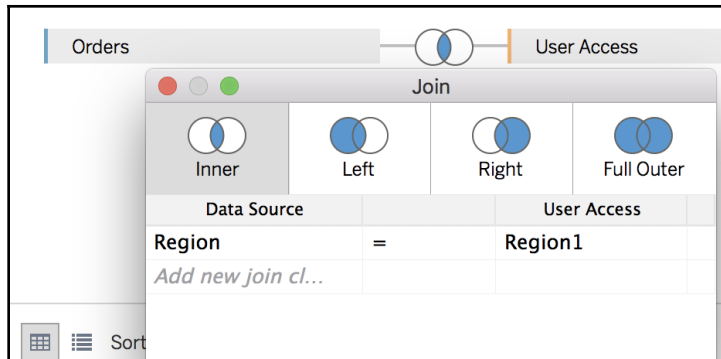
- All Users
- Central
- East
- South
- Top Management
- West
- . charlesminard@example...
- . johnsnow@example.com
- . williamplayfair@example...
- Tristan Guillevin

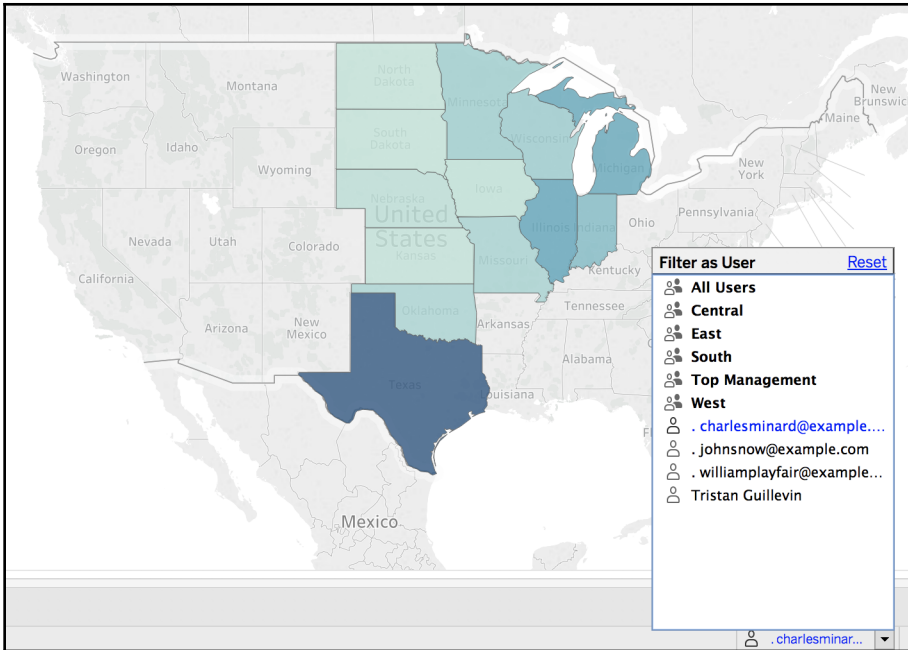
\$725 458
West

Sheet 1

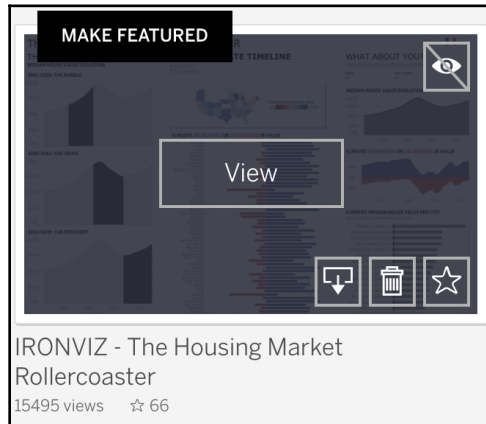


| Region | User |
|---------|-----------------------------|
| Central | johnsnow@example.com |
| West | johnsnow@example.com |
| East | johnsnow@example.com |
| South | johnsnow@example.com |
| West | williamplayfair@example.com |
| Central | charlesminard@example.com |





Chapter 14: How to Keep Growing Your Skills



Title
Make sure your viz has a good title so people don't pass it by when they're browsing Tableau Public.

Permalink
Plan on embedding your viz? This is an excellent way to drive traffic to your site.

Description
A great description can really improve your search results ranking.

Toolbar Settings

- Show view controls *Undo, Redo, Revert*
- Show author profile link
- Allow workbook and its data to be downloaded by others

Other Settings

- Show workbook sheets as tabs