Chapter 1: Keep Calm and Say Hello to Tableau

*) Tableau-Book1
File Server Help


*) Tableau-Book1
Eile Server Help
(3)

Tableau - Book2
Tableau - Book2
File Server Help
File Server Help

## Connect

To a File
Excel
Text File
Access
Statistical File
Other files

To a Server
Tableau Server
MySQL
Microsoft SQL Server
Oracle
Amazon Redshift
More Servers...
Password: $\square$
$\square$ Require SSL

Microsoft SQL Server

Server: $\square$

Database:
Optional

Enter information to sign in to the database:

- Use Windows Authentication (preferred)

Use a specific username and password:
$\square$Read uncommitted data




## A

Customer Na Segment Claire Gute Consumer Claire Gute Consumer Darrin Van H Corporate Sean O'Donn Consumer Sean O'Donn Consumer Brosina Hoffr Consumer Brosina Hoffr Consumer Brosina Hoffr Consumer Brosina Hoffr Consumer Brosina Hoffr Consumer Brosina Hoffr Consumer Brosina Hoffr Consumer Andrew Aller Consumer Irene Maddo Consumer Harold Pawla Home Office Harold Pawla Home Office Pete Kriz Consumer Alejandro Gr Consumer Zuschuss Dor Consumer Zuschuss Dor Consumer Zuschuss Dor Consumer Ken Black Corporate Ken Black Corporate

| C | D | E |
| :--- | ---: | ---: |
| Geography | Postal Code | Region |
| United States/Henderson/Kentucky | 42420 | South |
| United States/Henderson/Kentucky | 42420 | South |
| United States/Los Angeles/California | 90036 | West |
| United States/Fort Lauderdale/Florida | 33311 South |  |
| United States/Fort Lauderdale/Florida | 33311 South |  |
| United States/Los Angeles/California | 90032 West |  |
| United States/Los Angeles/California | 90032 West |  |
| United States/Los Angeles/California | 90032 West |  |
| United States/Los Angeles/California | 90032 West |  |
| United States/Los Angeles/California | 90032 West |  |
| United States/Los Angeles/California | 90032 West |  |
| United States/Los Angeles/California | 90032 | West |
| United States/Concord/North Carolina | 28027 | South |
| United States/Seattle/Washington | 98103 | West |
| United States/Fort Worth/Texas | 76106 | Central |
| United States/Fort Worth/Texas | 76106 | Central |
| United States/Madison/Wisconsin | 53711 | Central |
| United States/West Jordan/Utah | 84084 | West |
| United States/San Francisco/California | 94109 | West |
| United States/San Francisco/California | 94109 | West |
| United States/San Francisco/California | 94109 | West |
| United States/Fremont/Nebraska | 68025 | Central |
| United States/Fremont/Nebraska | 68025 | Central |
|  |  | 9 |






* Tableau-Book1








| Abc | Text / String / Character values |
| :---: | :--- |
| $\#$ | Numeric / Integer values |
| $\#$ | Date values |
| E $_{\odot}$ | Date and Time values |
| T\|F | Boolean (True/False) values |
| $\oplus$ | Geographic values that are to be used with Maps |





+草+ Tableau - Book1



## Chapter 2: Ready to Build Some Charts? Show Me!






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Abc Sub-Category
Abc Measure Names

## Measures

\# Discount
\# Profit
\# Quantity
\# Sales
© + Latitude (generated)
(1) Longitude (generated)





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book


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File Data Worksheet Dashboard Story Analysis Map Forma


## 率草 Tableau - My first Tableau Workbook










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File Data Worksheet Dashboard Story Analysis Map Format Server Window Help



葉 Tableau－My first Tableau Workbook



## Chapter 3: Hungry for More Charts? Dig In!





| iii Columns | MY(Order Date) |
| :--- | :--- |
| Rows | SUM(Profit) |

Blended axes chart
(15k














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File Data Worksheet Dashboard Story Analysis Map Format Server Window Help












|  | Female | Male |
| :--- | ---: | ---: |
| Minimum weight | 30 | 30 |
| Lower Quartile | 44.5 | 44 |
| Median | 56.5 | 60.5 |
| Upper Quartile | 75 | 82 |
| Maximum weight | 99 | 98 |



For a Gantt view try
1 date 白
1 or more Dimensions
0 to 2 Measures




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| Pages |  |  | iii Columns |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  |  |  | : $=$ Rows | State |  |
| Filters |  |  | Symbol map |  |  |
|  |  |  | State |  |  |
| Marks |  |  |  |  |  |
|  |  |  | Arizona | -3,428 |  |
| T Automatic - |  |  | Arkansas | 4,009 |  |
|  |  |  | California | 76,381 |  |
| $\begin{gathered} : \% \\ \text { Color } \end{gathered}$ | $\bigcirc$ | T | Colorado | -6,528 |  |
|  | Size | Text | Connecticut | 3,511 |  |
| - $\circ$ <br> Detail | $\underset{\text { Tooltip }}{\square}$ |  | Delaware | 9,977 |  |
|  |  |  | District of Columbia | 1,060 |  |
|  |  |  | Florida | -3,399 |  |
| T SUM(Profit) |  |  | Georgia | 16,250 |  |
|  |  |  | Idaho | 827 |  |
|  |  |  | Illinois | -12,608 |  |
|  |  |  | Indiana | 18,383 |  |
|  |  |  | lowa | 1,184 |  |
|  |  |  | Kansas | 836 |  |
|  |  |  | Kentucky | 11,200 |  |
|  |  |  | Louisiana | 2,196 |  |
|  |  |  | Maine | 454 |  |
|  |  |  | Maryland | 7,031 |  |
|  |  |  | Massachusetts | 6,786 |  |
|  |  |  | Michigan | 24,463 |  |
|  |  |  | Minnesota | 10,823 | $\checkmark$ |



For symbol maps try
1 geo $\oplus$ Dimension
0 or more Dimensions
0 to 2 Measures


## Special Values for [State]

There are 49 values that have unknown geographic locations.
What do you want to do?

## Edit Locations...

Correct the unknown locations.

## Filter data

Exclude the special values from the view and calculations.

## Show data at default position

Show the special values at a default position on the axis. For example, Null values are shown at 0 .

| Edit Locations |  |  |  |
| :---: | :---: | :---: | :---: |
| Geographic roles |  |  |  |
| Country/Region: | India | - | ! 49 issues |
| State/Province: | State |  |  |
| Match values to locations |  |  |  |
| ! State/Province |  |  |  |
|  | Your Data | Matching Location | $\wedge$ |
| Alabama |  | Unrecognized |  |
| Arizona |  | Unrecognized |  |
| Arkansas |  | Unrecognized |  |
| California |  | Unrecognized |  |
| Colorado |  | Unrecognized |  |
| Connecticut |  | Unrecognized |  |
| Delaware |  | Unrecognized |  |
| District of Colu | mbia | Unrecognized |  |
| Florida |  | Unrecognized | $\checkmark$ |
| $\square$ Show only unmatched locations in drop down list |  |  |  |
| Reset Matches |  | OK | Cancel |


| Edit Locations |  |  |  |  |  | $\times$ |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Geographic roles |  |  |  |  |  |  |
| Country/Region: India * |  |  |  |  |  |  |
| State/Province: | None |  |  |  | ! 49 issues |  |
| Match values to loc | (-) Fixed: | India |  |  |  |  |
| ! State/Prov | From field: | United S |  | $\times$ |  |  |
|  |  | United States |  |  |  |  |
|  |  | United States Minor Outlying Islands |  |  |  | $\wedge$ |
| Alabama |  |  | Unrecognizea |  |  |  |
| Arizona |  |  | Unrecognized |  |  |  |
| Arkansas |  |  | Unrecognized |  |  |  |
| California |  |  | Unrecognized |  |  |  |
| Colorado |  |  | Unrecognized |  |  |  |
| Connecticut |  |  | Unrecognized |  |  |  |
| Delaware |  |  | Unrecognized |  |  |  |
| District of Columbia |  |  | Unrecognized |  |  |  |
| Florida |  |  | Unrecognized |  |  | $\checkmark$ |

$\square$ Show only unmatched locations in drop down list







| Pages |  |
| :---: | :---: |
| Filters |  |
| Marks | $\checkmark$ |
| F\%. Filled Map | $\checkmark$ |
| Automatic <br> ool Bar <br> $N$ Line <br> $\triangle$ Area Square Circle <br> Shape Text |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
| \$5. Filled Map |  |
| $\begin{aligned} & \text { (5) Pie } \\ & \text { of Gantt Bar } \\ & \text { Polygon } \end{aligned}$ |  |



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| Background Images [Custom Background image] |  |
| :--- | :--- | :--- | :--- |
| Background Images: | Required Fields |
| Name Valid    <br>    Remove  <br>    Edit...  <br> Add Image...  OK Cancel Apply |  |










Custom Background image


| Edit Annotation |  |  |  |  |  |  |  |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  |  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |  |  |






## Chapter 4: Slice and Dice - Grouping, Sorting, and Filtering Data




## Tableau－My first Tableau Workbook

File Data Worksheet Dashboard Story Analys
$\stackrel{+4}{+++}+$
Data$\leftarrow \rightarrow$ 回$\mathrm{C}_{+} \mathrm{G}_{11}$
Analytics ..... ＊． 1
O Custom Background Image data（Cus．．． ..... $\wedge$
$\theta$ Gantt Chart data（Data for Box plot \＆．．．$\theta$ Orders（Sample－Superstore）
Dimensions品
Create Calculated Field．．． © Countr
Create Parameter．．．
abc Custon
Group by Folder
$\checkmark$ 呂 Geogra
－ Group by Data Source Table
－Sort by Name
$\oplus$ Post Sort by Data Source Order
Measures
Hide All Unused Fields
Show Hidden Fields
\＃Quantity


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| ＊Tableau－My first Tableau Workbook |  |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | $\underline{\text { Data }}$ | Worksheet | Dashboard | Story |  | lysis |
|  | ＋ | $\rightarrow$ 回 | ${ }_{+} \mathrm{Cl}_{1}$ | － 0 |  | ． 1 |
| Data |  | Analytics |  |  | ＊ |  |
| © Custom Background Image data（Cus．．． <br> Q Gantt Chart data（Data for Box plot \＆．．． |  |  |  |  | $\wedge$ |  |
| Po Orders（Sample－Superstore） |  |  |  |  | $\checkmark$ |  |
| Dimensions 排 |  |  |  | 非 | $\checkmark$ |  |
| Abc Customer ID <br> Abc Customer Name |  |  |  |  | $\wedge$ |  |
|  |  |  |  |  |  |  |
| $\square$ |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| （1）State |  |  |  |  | $\checkmark$ |  |
| Measures |  |  |  |  |  |  |
| \＃Discount |  |  |  |  |  |  |
| \＃Profit |  |  |  |  |  |  |
| \＃Quantity |  |  |  |  |  |  |



| iii Columns |  |  |  |
| :---: | :---: | :---: | :---: |
| : Rows | Customer First Name Customer Name |  |  |
| String Calculation |  |  |  |
| Customer First Name Customer Name |  |  |  |
| Aaron | Aaron Bergman | Abc | $\wedge$ |
|  | Aaron Hawkins | Abc |  |
|  | Aaron Smayling | Abc |  |
| Adam | Adam Bellavance | $A b c$ |  |
|  | Adam Hart | $A b c$ |  |
|  | Adam Shillingsburg | $A b c$ |  |
| Adrian | Adrian Barton | Abc |  |
|  | Adrian Hane | Abc |  |
|  | Adrian Shami | Abc |  |
| Aimee | Aimee Bixby | Abc |  |
| Alan | Alan Barnes | Abc |  |
|  | Alan Dominguez | Abc |  |
|  | Alan Haines | Abc |  |
|  | Alan Hwang | Abc |  |
|  | Alan Schoenberger | Abc |  |
|  | Alan Shonely | Abc |  |
| Alejandro | Alejandro Ballentine | Abc |  |
|  | Alejandro Grove | $A b c$ |  |
|  | Alejandro Savely | Abc |  |
| Aleksandra | Aleksandra Gannaway | $A b c$ |  |
| Alex | Alex Avila | Abc |  |
|  | Alex Grayson | Abc | $\checkmark$ |






## String Calculation

| Customer First Name Aaron | Customer ID | Concatenated string |  |  |
| :---: | :---: | :---: | :---: | :---: |
|  | AB-10015 | AaronAB-10015 | Abc | $\wedge$ |
|  | AH-10030 | AaronAH-10030 | Abc |  |
|  | AS-10045 | AaronAS-10045 | Abc |  |
| Adam | AB-10060 | AdamAB-10060 | Abc |  |
|  | AH-10075 | AdamAH-10075 | Abc |  |
|  | AS-10090 | AdamAS-10090 | Abc |  |
| Adrian | AB-10105 | AdrianAB-10105 | Abc |  |
|  | AH-10120 | AdrianAH-10120 | Abc |  |
|  | AS-10135 | AdrianAS-10135 | Abc |  |
| Aimee | AB-10150 | AimeeAB-10150 | Abc |  |
| Alan | AB-10165 | AlanAB-10165 | Abc |  |
|  | AD-10180 | AlanAD-10180 | Abc |  |
|  | AH-10195 | AlanAH-10195 | Abc |  |
|  | AH-10210 | AlanAH-10210 | Abc |  |
|  | AS-10225 | AlanAS-10225 | Abc |  |
|  | AS-10240 | AlanAS-10240 | Abc |  |
| Alejandro | AB-10255 | AlejandroAB-10255 | Abc |  |
|  | AG-10270 | AlejandroAG-10270 | Abc |  |
|  | AS-10285 | AlejandroAS-10285 | Abc |  |
| Aleksandra | AG-10300 | AleksandraAG-10300 | Abc |  |
| Alex | AA-10315 | AlexAA-10315 | Abc |  |
|  | AG-10330 | AlexAG-10330 | Abc | $\checkmark$ |

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| Pages |  |  | iii Columns | Measure Names |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  |  | : $=$ Rows | Sub-Category |  |  |
| Filters |  |  | Arithmetic Calculation |  |  |  |
| Measure Names |  |  | Sub-Category | Profit | Profit Margindisaggregated | Sales |
| Marks |  |  | Accessories | 41,937 | 169 | 167,380 |
|  |  |  | 18,138 | -73 | 107,532 |
| T Automatic |  |  |  | Art | 6,528 | 200 | 27,119 |
|  | $\begin{aligned} & 0 \\ & \text { Size } \end{aligned}$ | T | Binders | 30,222 | -304 | 203,413 |
|  |  | Text | Bookcases | -3,473 | -29 | 114,880 |
| $\therefore$ ㅇ․ <br> Detail | Tooltip |  | Chairs | 26,590 | 27 | 328,449 |
|  |  |  | Copiers | 55,618 | 22 | 149,528 |
|  |  |  | Envelopes | 6,964 | 107 | 16,476 |
| T Measure Values |  |  | Fasteners | 950 | 65 | 3,024 |
|  |  |  | Furnishings | 13,059 | 131 | 91,705 |
|  |  |  | Labels | 5,546 | 156 | 12,486 |
| Measure Values |  |  | Machines | 3,385 | -8 | 189,239 |
| SUM(Profit) |  |  | Paper | 34,054 | 583 | 78,479 |
|  |  |  | Phones | 44,516 | 106 | 330,007 |
| AGG(Profit Margin-d.. |  |  | Storage | 21,279 | 75 | 223,844 |
| SUM(Sales) |  |  | Supplies | -1,189 | 21 | 46,674 |
|  |  |  | Tables | -17,725 | -47 | 206,966 |


| Pages |  |  | iii Columns | Measure Names |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  |  | : $=$ Rows | Sub-Category |  |  |
| Filters |  |  | Arithmetic Calculation |  |  |  |
| Measure Names |  |  | Sub-Category | Profit | Sales | Profit Margindisaggregated |
| Marks |  |  | Accessories | 41,937 | 167,380 | 169 |
|  |  |  | Appliances | 18,138 | 107,532 | -73 |
| T Automatic - |  |  | Art | 6,528 | 27,119 | 200 |
| $\begin{gathered} \because \% \\ \text { Color } \end{gathered}$ | $\underset{\text { Size }}{\circ}$ | T | Binders | 30,222 | 203,413 | -304 |
|  |  | Text | Bookcases | -3,473 | 114,880 | -29 |
| $\begin{gathered} \text { ஃo } \\ \text { Detail } \end{gathered}$ | Tooltip |  | Chairs | 26,590 | 328,449 | 27 |
|  |  |  | Copiers | 55,618 | 149,528 | 22 |
|  |  |  | Envelopes | 6,964 | 16,476 | 107 |
| T Measure Values |  |  | Fasteners | 950 | 3,024 | 65 |
|  |  |  | Furnishings | 13,059 | 91,705 | 131 |
| Measure Values |  |  | Labels | 5,546 | 12,486 | 156 |
|  |  |  | Machines | 3,385 | 189,239 | -8 |
| SUM(Profit) |  |  | Paper | 34,054 | 78,479 | 583 |
|  |  |  | Phones | 44,516 | 330,007 | 106 |
| SUM(Sales) |  |  | Storage | 21,279 | 223,844 | 75 |
| AGG(Profit Margin-d.. |  |  | Supplies | -1,189 | 46,674 | 21 |
|  |  |  | Tables | -17,725 | 206,966 | -47 |


| Pages | iii Columns | Measure Names |
| :--- | :--- | :--- |
|  | ミ Rows | Sub-Category |



## Arithmetic Calculation

| Sub-Category | Profit | Sales | Profit Margin- <br> disaggregated | Profit Margin- <br> aggregated |
| :--- | ---: | ---: | ---: | ---: |
| Accessories | 41,937 | 167,380 | 169 | 0 |
| Appliances | 18,138 | 107,532 | -73 | 0 |
| Art | 6,528 | 27,119 | 200 | 0 |
| Binders | 30,222 | 203,413 | -304 | 0 |
| Bookcases | $-3,473$ | 114,880 | -29 | 0 |
| Chairs | 26,590 | 328,449 | 27 | 0 |
| Copiers | 55,618 | 149,528 | 22 | 0 |
| Envelopes | 6,964 | 16,476 | 107 | 0 |
| Fasteners | 950 | 3,024 | 65 | 0 |
| Furnishings | 13,059 | 91,705 | 131 | 0 |
| Labels | 5,546 | 12,486 | 156 | 0 |
| Machines | 3,385 | 189,239 | -8 | 0 |
| Paper | 34,054 | 78,479 | 583 | 0 |
| Phones | 44,516 | 330,007 | 106 | 0 |
| Storage | 21,279 | 223,844 | 75 | 0 |
| Supplies | $-1,189$ | 46,674 | 21 | 0 |
| Tables | $-17,725$ | 206,966 | -47 | 0 |






First purchase date

Last purchase date Ø Orders (Sample - Superstore)

MAX([Order Date])

The calculation is valid.


OK

## Last purchase date

## iii <br> Columns



## Date Calculation

| Customer Name | First purchase date | Last purchase date |  |
| :--- | :--- | :--- | :--- |
| Aaron Bergman | $19-02-2011$ | $11-11-2013$ | Abc |
| Aaron Hawkins | $22-04-2011$ | $19-12-2014$ | Abc |
| Aaron Smayling | $27-07-2011$ | $04-10-2014$ | Abc |
| Adam Bellavance | $18-09-2012$ | $07-11-2014$ | Abc |
| Adam Hart | $16-11-2011$ | $27-11-2014$ | Abc |
| Adam Shillingsburg | $22-09-2011$ | $03-12-2014$ | Abc |
| Adrian Barton | $20-12-2011$ | $20-11-2014$ | Abc |
| Adrian Hane | $18-07-2011$ | $01-11-2014$ | Abc |
| Adrian Shami | $14-11-2013$ | $20-11-2014$ | Abc |
| Aimee Bixby | $05-03-2011$ | $20-11-2014$ | Abc |
| Alan Barnes | $16-11-2011$ | $06-12-2014$ | Abc |
| Alan Dominguez | $19-11-2011$ | $02-12-2014$ | Abc |
| Alan Haines | $05-03-2012$ | $06-11-2014$ | Abc |
| Alan Hwang | $29-11-2011$ | $25-12-2014$ | Abc |
| Alan Schoenberger | $18-10-2011$ | $09-12-2014$ | Abc |
| Alan Shonely | $15-03-2011$ | $22-06-2014$ | Abc |
| Alejandro Ballentine | $22-07-2011$ | $18-07-2014$ | Abc |
| Alejandro Grove | $13-05-2011$ | $28-03-2014$ | Abc |
| Alejandro Savely | $22-05-2013$ | $12-12-2014$ | Abc |
| Aleksandra Gannaway | $26-04-2011$ | $04-09-2014$ | Abc |
| Alex Avila | $31-03-2011$ | $30-06-2014$ | Abc |
| Alex Grayson | $04-08-2013$ | $23-12-2014$ | Abc |



| Pages |
| :--- |



| iii Columns | AGG(Days since last p.. |  |  |
| :--- | :--- | :--- | :--- |
| : Rows | Customer Name | AGG(First purchase da.. | AGG(Last purchase da.. |

## Date Calculation

| Customer Name | First purchase date | Last purchase date |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Aaron Bergman | 19-02-2011 | 11-11-2013 |  |  |  |  |  |
| Aaron Hawkins | 22-04-2011 | 19-12-2014 | I |  |  |  |  |
| Aaron Smayling | 27-07-2011 | 04-10-2014 |  |  |  |  |  |
| Adam Bellavance | 18-09-2012 | 07-11-2014 |  |  |  |  |  |
| Adam Hart | 16-11-2011 | 27-11-2014 |  |  |  |  |  |
| Adam Shillingsburg | 22-09-2011 | 03-12-2014 | - |  |  |  |  |
| Adrian Barton | 20-12-2011 | 20-11-2014 |  |  |  |  |  |
| Adrian Hane | 18-07-2011 | 01-11-2014 |  |  |  |  |  |
| Adrian Shami | 14-11-2013 | 20-11-2014 |  |  |  |  |  |
| Aimee Bixby | 05-03-2011 | 20-11-2014 |  |  |  |  |  |
| Alan Barnes | 16-11-2011 | 06-12-2014 | $\square$ |  |  |  |  |
| Alan Dominguez | 19-11-2011 | 02-12-2014 | $\square$ |  |  |  |  |
| Alan Haines | 05-03-2012 | 06-11-2014 |  |  |  |  |  |
| Alan Hwang | 29-11-2011 | 25-12-2014 |  |  |  |  |  |
| Alan Schoenberger | 18-10-2011 | 09-12-2014 | $\square$ |  |  |  |  |
| Alan Shonely | 15-03-2011 | 22-06-2014 |  |  |  |  |  |
| Alejandro Ballentine | 22-07-2011 | 18-07-2014 |  |  |  |  |  |
| Alejandro Grove | 13-05-2011 | 28-03-2014 |  |  |  |  |  |
| Alejandro Savely | 22-05-2013 | 12-12-2014 | I |  |  |  |  |
|  |  |  | 0 | 200 | 400 | 600 | 800 |
|  |  |  |  |  | Days since last purchase |  |  |

For sorting in descending order




Logic Calculation-IF...ELSE



Is Sales $<100 \mathrm{~K}$ ? Orders (Sample - Superstore) $\times$

IF SUM([Sales]) < 100000 THEN 'Below 100K' ELSE 'Above 100K' END




| Top $5+$ Others $\square$ Orders (Sample - Superstore) | $\square$ Orders (Sample - Superstore) | X |
| :---: | :---: | :---: |
| IF [Top 5 customers by Sales] THEN [Customer Name] <br> ELSE 'Others' <br> END |  |  |
| The calculation is valid. | Apply | OK |


| Pages |  |  | iii Columns |  |
| :---: | :---: | :---: | :---: | :---: |
|  |  |  | : $=$ Rows | Top $5+$ Others |
| Filters |  |  | Sets in Calculation |  |
|  |  |  | Top $5+$ Others |  |
|  |  |  | Adrian Barton | 14,474 |
| Marks |  |  | Others | 2,208,919 |
|  |  |  | Raymond Buch | 15,117 |
| T Automatic |  | - | Sean Miller | 25,043 |
| $\bullet 8$ |  | T | Tamara Chand | 19,052 |
| Color | Size | Text | Tom Ashbrook | 14,596 |
| Detail | Tooltip |  |  |  |
| T SUM(Sales) |  |  |  |  |





Analysis > Totals in the toolbar


Analytics > Totals in the Analytics pane

| Pages |  |  | iii Columns Region |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  |  | : $=$ Rows | Category |  |  |  |  |
| Filters |  |  | Table Calculations-percent of total |  |  |  |  |  |
|  |  |  |  |  |  | Region |  |  |
|  |  |  | Category | Central | East | South | West | Grand Total |
| Marks |  |  | Furniture | 163,797 | 208,291 | 117,299 | 252,613 | 742,000 |
| (T) Automatic |  |  | Office Supplies | 167,026 | 205,516 | 125,651 | 220,853 | 719,047 |
|  |  |  | Technology | 170,416 | 264,974 | 148,772 | 251,992 | 836,154 |
|  | $\bigcirc$ | $\begin{aligned} & \text { T } \\ & \text { Text } \end{aligned}$ | Grand Total | 501,240 | 678,781 | 391,722 | 725,458 | 2,297,201 |
|  | Size |  |  |  |  |  |  |  |
| $\begin{gathered} \circ \\ \text { Detail } \end{gathered}$ | $\underset{\text { Tooltip }}{\square}$ |  |  |  |  |  |  |  |
| T SUM(Sales) |  |  |  |  |  |  |  |  |




| Filters |  |  |  | Table Calculations |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  |  |  | Catego |  | Central |
| Marks |  |  |  | Furnit |  | 22.08\% |
|  |  |  |  | Office | Supplies | 23.23\% |
| T Automatic |  |  | $\checkmark$ | Technology |  | 20.38\% |
| $\begin{gathered} \text { :\% } \\ \text { Color } \end{gathered}$ |  | 0 | T | Grand Total |  | 21.82\% |
|  |  | Size | Text |  |  |  |
| $\begin{gathered} \circ \\ \mathrm{De} \\ \mathrm{De} \end{gathered}$ | Filter... |  |  |  |  |  |
|  | Show Filter |  |  |  |  |  |
|  |  | Format... <br> Include in Tooltip |  |  |  |  |
|  | $\checkmark$ |  |  |  |  |  |
| Dimension |  |  |  |  |  |  |
| Attribute |  |  |  |  |  |  |
| $\bullet$ |  | Measure (Sum) |  | - |  |  |
|  |  | Discret |  |  |  |  |
| - | Continuous |  |  |  |  |  |
|  | Edit in Shelf |  |  |  |  |  |
|  |  | Compute Using |  | - | Table (across) |  |
|  |  | Edit Table Calculation... |  |  | Table (down) |  |
| alcula |  |  |  |  | Table |  |
|  |  | Quick Table Calculation |  | n | Cell |  |
| 5): 300 |  | Total using (Automatic) |  | ) | Cate |  |
|  |  | Remov |  |  | Regio |  |




| Pages |
| :--- |



Table Calculations-pt

| Category | Central | E |
| :--- | ---: | ---: |
| Furniture | $7.13 \%$ | 9.6 |
| Office Supplies | $7.27 \%$ | 8.5 |
| Technology | $7.42 \%$ | 11.6 |
| Grand Total | $\mathbf{2 1 . 8 2 \%}$ | 29.6 |

Double click on the Green pill i.e. SUM(Sales)




| Pages |  |  | iii Columns | Region |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  |  | : $=$ Rows | Category |  |  |  |  |
| Filters |  |  | LOD-percent of total |  |  |  |  |  |
|  |  |  | Category | Central | East | South | West | Grand T.. |
| Marks |  |  | Furniture | 0.0713 | 0.0907 | 0.0511 | 0.1100 | 0.3230 |
|  |  |  | Office Supplies | 0.0727 | 0.0895 | 0.0547 | 0.0961 | 0.3130 |
| T Automatic |  |  | Technology Grand Total | 0.0742 | 0.1153 | 0.0648 | 0.1097 | 0.3640 |
| $\because \%$ |  | $\begin{gathered} \text { T } \\ \text { Text } \end{gathered}$ |  | 0.2182 | 0.2955 | 0.1705 | 0.3158 | 1.0000 |
| $\therefore \circ$ <br> Detail | Tooltip |  |  |  |  |  |  |  |
| T AGG(LOD-Percent of T.. |  |  |  |  |  |  |  |  |









## FIXED LOD










| Create Parameter |  |  |  | $\times$ |
| :---: | :---: | :---: | :---: | :---: |
| Name: Parameter 1 |  |  |  | Comment >> |
| Properties |  |  |  |  |
| Data type: | Float | - |  |  |
| Current value: | 1 |  |  |  |
| Display format: | Automatic | $\checkmark$ |  |  |
| Allowable values: $\bigcirc$ All $\bigcirc$ List $\bigcirc$ Range |  |  |  |  |
|  |  |  | OK | Cancel |



## Tableau - My first Tableau Workbook





## Chapter 5: Adding Flavor - Create Calculated Fields






Dashboard > New Dashboard in the toolbar


## New Dashboard tab



## Tableau - My first Tableau Workbook



Tableau - My first Tableau Workbook


## Objects

| Horizontal | 目 Image |
| :---: | :---: |
| $\square$ | Vertical |
| A Text | $\oplus$ Web Page |
|  | $\square$ |
| Blank |  |
| Tiled | Floating |

Show dashboard title




## Tableau - My first Tableau Workbook




Sales distribution by Region and Category





Tableau - My first Tableau Workbook



## Sales distribution dashboard



Sales distribution dashboard



Sales distribution dashboard


Sales distribution by Region and Category


## Sales distribution dashboard




Sales distribution dashboard



别四 •
Showl

## -ion dashboard



Connect sheets to external web resources using URL actions, or to other sheets in the same workbook using Filter actions and Highlight actions.

| Name | Run On | Source |  |  |
| :--- | :--- | :--- | :--- | :--- |
|  |  |  |  |  |

## Actions

Connect sheets to external web resources using URL actions, or to other sheets in the same workbook using Filter actions and Highlight actions.

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




## Actions

Connect sheets to external web resources using URL actions, or to other sheets in the same workbook using Filter actions and Highlight actions.

| Name <br> マRegion filter | Run On <br> Relect | Source |  |  |
| :--- | :--- | :--- | :--- | :--- |
| Dashboard for Filter and ... All |  |  |  |  |
|  |  |  |  | Fields |
|  |  |  |  |  |
|  |  |  |  |  |


| Add Action > Edit... | Remove |
| :--- | :--- | :--- |

Show actions for all sheets in this workbook
OK Cancel

Sales distribution dashboard


Sales distribution by Region and Category




Sales distribution by Region and Category



| Add Highlight Action |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: |
| Name：$\quad$ Highlight1 |  |  |  |  |
| Source Sheets： |  |  |  |  |
| 断 Dashboard for Filter and Highlight Action |  |  | $\checkmark$ | Run action on： |
| Sales distribution by Region <br> Sales distribution by Region and Category <br> Sales distribution by State |  |  |  | （f）Hover |
|  |  |  |  | 资 Select |
|  |  |  |  | 㙁 Menu |
| Target Sheets |  |  |  |  |
| $\boxplus$ Dashboard for Filter and Highlight Action $\checkmark$ |  |  |  |  |
| Sales distribution by Region <br> Sales distribution by Region and Category <br> Sales distribution by State |  |  |  |  |
| Target Highlighting |  |  |  |  |
| Selected FieldsDates and TimesAll Fields |  | Category Region State |  |  |
|  |  |  |  | OK |






20k
$-\quad 0$
$\times$
rd Story Analysis Map Format Server Window Help

T $<4$ Entire View $\rightarrow$ 遻困－ゆ
ㄹ Show Me
Sales distribution dashboard

（ Region




* Tableau - My first Tableau Workbook






| Add URL Action |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: |
| Name: | State URL |  |  |  |
| Source Sheets: |  |  |  |  |
| 四 Dashboard for URL action |  |  | Run action on: |  |
| $\square$ Sales distribution by State |  |  | is Hover |  |
|  |  |  | Select |  |
| URL |  |  |  |  |
|  |  |  |  |  |
| http://en.wikipedia.org/wik/<State> |  |  |  |  |
| Test Link http://en.wikipedia.org/wiki/<State> |  |  |  |  |
| URL Options |  |  |  |  |
| $\square$ URL Encode Data Values |  |  | Item Delimiter: |  |
| $\square$ Allow Multiple Values |  |  | Delimiter Escape: |  |
|  |  |  | OK |  |



Hide Sheet (One sheet at a time)



## Chapter 6: Serve It on Dashboard!






Dashboard > New Dashboard in the toolbar


## New Dashboard tab



## Tableau - My first Tableau Workbook



Tableau - My first Tableau Workbook


## Objects

| Horizontal | 目 Image |
| :---: | :---: |
| $\square$ | Vertical |
| A Text | $\oplus$ Web Page |
|  | $\square$ |
| Blank |  |
| Tiled | Floating |

Show dashboard title




## Tableau - My first Tableau Workbook




Sales distribution by Region and Category





Tableau - My first Tableau Workbook



## Sales distribution dashboard



Sales distribution dashboard



Sales distribution dashboard


Sales distribution by Region and Category


## Sales distribution dashboard




Sales distribution dashboard



别四 •
Showl

## -ion dashboard



Connect sheets to external web resources using URL actions, or to other sheets in the same workbook using Filter actions and Highlight actions.

| Name | Run On | Source |  |  |
| :--- | :--- | :--- | :--- | :--- |
|  |  |  |  |  |

## Actions

Connect sheets to external web resources using URL actions, or to other sheets in the same workbook using Filter actions and Highlight actions.

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




## Actions

Connect sheets to external web resources using URL actions, or to other sheets in the same workbook using Filter actions and Highlight actions.

| Name <br> マRegion filter | Run On <br> Relect | Source |  |  |
| :--- | :--- | :--- | :--- | :--- |
| Dashboard for Filter and ... All |  |  |  |  |
|  |  |  |  | Fields |
|  |  |  |  |  |
|  |  |  |  |  |

Add Action > Edit... Remove

Show actions for all sheets in this workbook
OK Cancel

Sales distribution dashboard



Sales distribution by Region and Category




Sales distribution by Region and Category



| Add Highlight Action |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: |
| Name：$\quad$ Highlight1 |  |  |  |  |
| Source Sheets： |  |  |  |  |
| 断 Dashboard for Filter and Highlight Action |  |  | $\checkmark$ | Run action on： |
| Sales distribution by Region <br> Sales distribution by Region and Category <br> Sales distribution by State |  |  |  | （f）Hover |
|  |  |  |  | 资 Select |
|  |  |  |  | 㙁 Menu |
| Target Sheets |  |  |  |  |
| $\boxplus$ Dashboard for Filter and Highlight Action $\checkmark$ |  |  |  |  |
| Sales distribution by Region <br> Sales distribution by Region and Category <br> Sales distribution by State |  |  |  |  |
| Target Highlighting |  |  |  |  |
| Selected FieldsDates and TimesAll Fields |  | Category Region State |  |  |
|  |  |  |  | OK |






20k
$-\quad 0$
$\times$
rd Story Analysis Map Format Server Window Help

T $<4$ Entire View $\rightarrow$ 遻困－ゆ
ㄹ Show Me
Sales distribution dashboard

（ Region




* Tableau - My first Tableau Workbook






| Add URL Action |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: |
| Name: | State URL |  |  |  |
| Source Sheets: |  |  |  |  |
| 四 Dashboard for URL action |  |  | Run action on: |  |
| $\square$ Sales distribution by State |  |  | is Hover |  |
|  |  |  | Select |  |
| URL |  |  |  |  |
|  |  |  |  |  |
| http://en.wikipedia.org/wik/<State> |  |  |  |  |
| Test Link http://en.wikipedia.org/wiki/<State> |  |  |  |  |
| URL Options |  |  |  |  |
| $\square$ URL Encode Data Values |  |  | Item Delimiter: |  |
| $\square$ Allow Multiple Values |  |  | Delimiter Escape: |  |
|  |  |  | OK |  |



Hide Sheet (One sheet at a time)



## Chapter 7: The Right MIX - Blending Multiple Data Sources



Connecting to Access


Connecting to Excel

*) Tableau - My first Tableau Workbook
Eile Data Server Window Help


Data Connection window while connecting to Excel












| Sales vs Budget Sales | $\square$ Multiple Table Join-cross database |  |
| :--- | :--- | :--- |
| SUM ([Sales] ) <SUM ([Budget Sales])   <br> The calculation is valid. Apply OK |  |  |




## Tableau - My first Tableau Workbook

File Data Worksheet Dashboard Story Analysis Map For


## Data

Analytics $\approx$

- Box \& Whisker Plot data (Data for Box plot \& Gantt chart)
- CoffeeChain Query (Sample - Coffee Chain)

P Custom Background Image data (Custom Background I...
Ө Deadliest Earthquakes (Deadliest earthquakes)

- Deadliest Earthquakes-Details (Deadliest earthquakes d...
- Gantt Chart data (Data for Box plot \& Gantt chart)
© Multiple Table Join-cross database
Q Multiple Table Join-single database
G Orders (Sample - Superstore)


## Dimensions

首 Date
Abc Deaths
Abc Location
Abc Measure Names

## Measures

\# Magnitude
=\# Number of Records


## Tableau - My first Tableau Workbook

Eile Data Worksheet Dashboard Story Analysis Map Format Servel


Data | Analytics | Pages |
| :--- | :--- | :--- |

Ө Box \& Whisker Plot data (Data for Box plot \& Gantt chart)

- CoffeeChain Query (Sample - Coffee Chain)

O Custom Background Image data (Custom Background I...
Po Deadliest Earthquakes (Deadliest earthquakes)
Deadliest Earthquakes-Details (Deadliest earthquakes d...
Q Gantt Chart data (Data for Box plot \& Gantt chart)
$\ominus$ Multiple Table Join-cross database
Ø Multiple Table Join-single database
O Orders (Sample - Superstore)

## Dimensions

自 Date
Abc Deaths
Abc Location
Abc Measure Names

Filters

## Measures

\# Magnitude
=\# Number of Records
\# Measure Values

## Parameters

\# Count of customers
\# Sales Target


© Multiple Table Join-single database
Ө Orders (Sample - Superstore)

## Dimensions

苗 Date
Abc Deaths
Abc Location $\quad \mathrm{G} / \mathrm{s}$
$\qquad$
00 D Automatic

| $\%$ 0 <br> Color  | Size |
| :---: | :---: |
| $\therefore 0$ $\square$ <br> Detail  | Tooltip |

Abc Measure Names

## Use Location as linking field

## Tableau - My first Tableau Workbook

|  | Data | W | Da | Story | A |  | Forma | Server |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  |  |  |  |  |  |  |  |
| Dat |  |  | Analytic |  |  |  |  | Pages |
| Box \& Whisker Plot data (Data for Box plot \& Gantt chart)CoffeeChain Query (Sample - Coffee Chain)Custom Background Image data (Custom Background Ima... |  |  |  |  |  |  |  | Filters |
| Deadliest Earthquakes (Deadliest earthquakes) <br> Deadliest Earthquakes-Details (Deadliest earthquakes det... |  |  |  |  |  |  |  | SUM(M: |
| Gantt Chart data (Data for Box plot \& Gantt chart)Multiple Table Join-cross databaseMultiple Table Join-single databaseOrders (Sample - Superstore) |  |  |  |  |  |  |  | Marks |
|  |  |  |  |  |  |  |  | :\% |

at Server Window Help


| Data Blending |  |
| :---: | :---: |
| Year of Date | Location |
| 1906 | Off coast of Esmeraldas, Ecuador |
|  | Valparaiso, Chile |
| 1907 | Qaratog (Karatag), Tajikistan |
| 1917 | Bali, Indonesia |
| 1 กว1 |  |


| File | Data | Worksheet | Dashboard | Story | Analysis | Map | Format | Server | Win |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| +4+ |  | New Data Source |  |  |  |  |  |  | + D |  |
| Da |  | Paste Data |  |  |  |  |  |  | +V |  |
| $\theta$ |  | Refresh All Extracts... |  |  |  |  |  |  |  |  |
| $\bigcirc$ |  | Edit Relationships... |  |  |  |  |  |  |  |  |
| - |  | Replace Data Source... |  |  |  |  |  |  |  |  |
| Q |  | Upgrade Data Sources... |  |  |  |  |  |  |  | ) |
| $\theta$ |  | Tableau Data Server |  |  |  |  |  |  | , |  |
| $\theta$ |  | Box \& Whisker Plot data (Data for Box plot \& Gantt chart) |  |  |  |  |  |  | - |  |
| $\theta$ |  | CoffeeChain Query (Sample - Coffee Chain) |  |  |  |  |  |  | , |  |
|  |  | Custom Background Image data (Custom Background Image data) |  |  |  |  |  |  |  |  |
| Dit |  | Deadliest Earthquakes (Deadliest earthquakes) |  |  |  |  |  |  |  |  |
| 苗 | $\checkmark$ | Deadliest Earthquakes-Details (Deadliest earthquakes details) |  |  |  |  |  |  |  |  |
| Ab |  | Gantt Chart data (Data for Box plot \& Gantt chart) |  |  |  |  |  |  |  |  |
| Ab |  | Multiple Table Join-cross database |  |  |  |  |  |  |  |  |
| Ab |  | Multiple Table Join-single database |  |  |  |  |  |  |  |  |
|  |  | Orders (Sample - Superstore) |  |  |  |  |  |  | , |  |



| Add/Edit Field Mapping |  |  |
| :---: | :---: | :---: |
| Primary data source field: | Secondary data source field: |  |
| Enter search text | Enter search text |  |
| Coordinates <br> Date <br> Date <br> Location | Date <br> Deaths <br> Location |  |

Tableau－My first Tableau Workbook

| File Data Server Window Help |  |
| :---: | :---: |
| $\stackrel{+++}{+++}+\infty$ | B．Union data |
| Connections Add |  |
| Union data Excel |  |
| Sheets 0 |  |
| $\square$ Use Data Interpreter |  |
| Data Interpreter might be able to clean your Excel workbook． |  |
| 囲 Q1 2015 |  |
| 囲 Q2 2015 | 囲 $\ddagger$ S Sort fields Data source order |
| 囲 Q3 2015 |  |
| 囲 Q4 2015 |  |
| 気 New Union |  |
|  |  |




ok


## Drop Field

Which field do you want to drop？

```
甼 Date (Continuous)
|}\mathrm{ Date (Discrete)
# YEAR(Date)
# QUARTER(Date)
# MONTH(Date)
# DAY(Date)
# WEEK(Date)
# WEEKDAY(Date)
# MY(Date)
# MDY(Date)
# CNT(Date)
# CNTD(Date)
曾 MIN(Date)
目 MAX(Date)
E
# QUARTER(Date)
#. MONTH(Date)
E.C.WEEK(Date)
#.% DAY(Date)
酋 ATTR(Date)
```





Tableau－My first Tableau Workbook
File Data Server Window Help

| ＋＋＋＋ | $\leftarrow \rightarrow \square$ |
| :---: | :---: |

$$
\theta \cdot \text { Samp }
$$

Connections
Sample－Coffee Chain Access

## Table

0
曲 CoffeeChain Query
囲 factTable
囲 Location
囲 Product
荧 New Custom SQL
囲 $:$ ㅇ
Add new custom SQL query



Custom SQL



湥 Tableau - My first Tableau Workbook






Tableau - My first Tableau Workbook



Extract



| Original Data |  |
| :---: | :---: |
| Date $\quad$ Category | Sales |
| 01 March 2015 Furniture | $\$ 100$ |
| 01 March 2015 Office Supplies | $\$ 500$ |
| 01 March 2015 Office Supplies | $\$ 800$ |
| 01 March 2015 Technology | $\$ 350$ |
| 02 March 2015 Furniture | $\$ 550$ |
| 02 March 2015 Furniture | $\$ 150$ |
| 02 March 2015 Technology | $\$ 850$ |

Each record is shown as a separate row.

|  | Aggregated Data (no roll up) |
| :---: | :---: |
| Date | Category |

Records with the same date and category have been aggregated into a single row.
Aggregated Data (rolled up to months)
Date
Category
Mar-15 Furniture
Mar-15 Office Supplies
Mar-15 Technology

Dates have been rolled up to the Month level and records with the same category have been aggregated into a single row.


## Tableau - My first Tableau Workbook



## Chapter 8: Garnish with Reference Lines, Trends, Forecasting, and Clustering

Tableau - My first Tableau Workbook
File Data Worksheet Dashboard Story $\underline{\text { Analysis Map Fg }}$


## Data

Analytics
$\stackrel{-}{*}$
Pag
G Box \& Whisker Plot data (Data for Box plot \& G... ^

- CoffeeChain Query (Sample - Coffee Chain)
$\theta$ Custom Background lmage data (Custom Bac...
Filte
© Custom SQL Query (Sample - Coffee Chain)
O Deadliest Earthquakes (Deadliest earthquakes)
Ө Deadliest Earthquakes-Details (Deadliest earth...
Ө Gantt Chart data (Data for Box plot \& Gantt ch...
Ө Multiple Table Join-cross database
Dimensions
(4) Area Code

囲 Date
Abc Market
Abc Market Size
Abc Product



## Tableau－My first Tableau Workbook

File Data Worksheet Dashboard Story Analysis Map F


Summarize
：！！Constant Line
：！Average Line
並 Median with Quartiles
「 Box Plot
$\square$ Totals

Model
啇 Average with $95 \% \mathrm{Cl}$
剛 Median with 95\％Cl
$\%$ Trend Line
$\checkmark$ Forecast
䔲 Cluster

## Custom

：！！Reference Line
畀 Reference Band
（Ii）Distribution Band
㝌 Box Plot

* Tableau - My first Tableau Workbook


| iii Columns | Date |
| :--- | :--- |
| $:$ Rows | SUM(Profit) |

Trend line




## Trend Lines Options

Model type
() Linear

Logarithmic
Exponential
Polynomial, Degree: 3 *

Options
Include the following fields as factors:
$\square$ Allow a trend line per color
$\square$ Show Confidence BandsEorce $y$-intercept to zero
$\square$ Show recalculated line for highlighted or selected data points






Tableau - My first Tableau Workbook
File Data Worksheet Dashbooard Sțory Analysis



## Drop Field

Which field do you want to drop？









Learn more about forecast options
Forecast Options

Forecast Length
() Automatic Next 13 months

Onntil


Source Data
Aggregate by: Automatic (Months) $\quad$ -
Ignore last: $1 \quad$ Months
$\square$ Fill in missing values with zeroes
Forecast Model

$\checkmark$ Show $95 \%$ prediction intervals
Currently using source data from Jan 2011 to Nov 2014 to create a forecast through Dec 2015. Looking for potential seasonal patterns every 12 Months.

Learn more about forecast options



Learn more about forecast options




|  |  |  |
| :--- | :--- | :--- |
| iii Columns | Product Type | Product |
| $\vdots$ Rows | SUM(Sales) |  |

Reference Line-Bullet chart


Tableau - My first Tableau Workbook





Formatting
Line:


Fill Above:


Fill Below:


Show recalculated line for highlighted or selected data points

Add Reference Line, Band, or Box


ScopeEntire TablePer Pane
(-) Per Cell

Line


Line:


Fill Above:


Fill Below:


Show recalculated line for highlighted or selected data points

Edit Reference Line, Band, or Box


Line:


Fill Above:


Fill Below:


Show recalculated line for highlighted or selected data points


Reference Line-Bullet chart


Reference Line-Bullet chart


Per Pane

Entire Table

Add Reference Line, Band, or Box


Band From
Value: SUM(Sales) $\checkmark$ Minimum $\vee$
Label: Computation $\checkmark$
Band To
Value: SUM(Sales) $\vee$ Maximum $\vee$
Label: Computation $\vee$
Formatting


Fill: $\square$
$\square$ show recalculated band for highlighted or selected data points

Tableau - My first Tableau Workbook









Edit Reference Line, Band, or Box


Scope
$\bigcirc$ Entire Table Per Pane Per Cell
Line


Line:


Fill Above:


Fill Below:

$\square$
Show recalculated line for highlighted or selected data points

＊Tableau－My first Tableau Workbook
File Data Server Window Help
$\theta$ ．World Indicators Extract
｜Extract

| $\substack{\text { World Indicators } \\ \text { Tablesu Data Extart }}$ |
| :--- |
| Table |

囲 Extract（Extract．Extract）
$\qquad$


囲 $\equiv$ Sort fields Data source order $\quad \square$ Show aliases $\square$ Show hidden fields $1.000 \Rightarrow$ rows

| \＃ | \＃ | $\checkmark$ | \＃ | © | \＃ | \＃ | \＃ | \＃ | \＃ |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Enejshs | Enelichs |  | Enyishs | Enejans | Engishs | Enejshs | Engishs | Enyishs | Ent |
| Birth Rate | Business Tax Rate | 三 | C02 Emissions | Country | Days to Start Busi．．． | Ease of Business | Energy Usage | GDP | He |


| 0.0200000 | null | 87，931 | Algeria | null | null | 26，998 | 54，790，058，9．．． |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| 0.0500000 | null | 9，542 | Angola | null | null | 7，499 | 9，129，594，819 |
| 0.0430000 | null | 1，617 | Benin | null | null | 1，983 | 2，359，122，303 |
| 0.0270000 | null | 4，276 | Botswana | null | null | 1，836 | 5，788，311，645 |
| 0.0460000 | null | 1，041 | Burkina Faso | null | null | null | 2，610，959，139 |
| 0.0420000 | null | 301 | Burundi | null | null | null | 870，486，066 |
| 0.0410000 | null | 3，432 | Cameroon | null | null | 6，310 | 9，287，367，569 |
| 0.0390000 | null | 268 | Central African Repu．．． | null | null | null | 914，500，332 |


\＆Syvylyze ．

Tableau－My first Tableau Workbook
File Data Worksheet Dashboard Story Analysis Mal


Q Multiple Table Join－cross database
O Multiple Table Join－single database
ใ勺彑์ Orders（Sample－Superstore）
O World Ind
（7）Country
Abc Region
自 Year
Abc Measure Names

Filters

Marks

T）Au


Detail







$\square$ Show scaled centers
Copy to Clipboard Learn more about the duster summary statistics


## Chapter 9: Bon Appetit! Tell a story and Share It with Others

Tableau - My first Tableau Workbook
File Data Worksheet Dashboard Sțory Analysis Map Forn


- Deadliest Earthquakes (Deadliest eart... ^
© Deadliest Earthquakes-Details (Deadli...
- Gantt Chart data (Data for Box plot \& ...

Э Multiple Table Join-cross database

- Multiple Table Join-single database

9 Orders (Sample - Superstore)
9 Union(Union data)
$\theta$ World Indicators Extract

## Dimensions

( + Country
Abc Region
自 Year
Abc Measure Names

Filters

Marks
T Automatic


## Measures

\# Birth Rate
\# Business Tax Rate $\square$

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* Tableau - My first Tableau Workbook










## Story Title




## Story Title




## Story Title




## Story Title






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| （11）FIXED LOD |  |
| :---: | :---: |
| （1il）Parameters |  |
| 田 My first Tableau Dashboard |  |
| 田 Dashboard for Filter Action |  |
| $\boxplus$ Dashboard for Highlight Action |  |
| 田 Dashboard for URL action |  |
| （1i）Multiple Table Join－single database |  |
| （1i）Multiple Table Join－cross database |  |
| （1）Data Blending |  |
| （1il）Union |  |
| （11）Custom SQL |  |
| （1i）Extract |  |
| （1）Trend line |  |
| n．11 5nmanation |  |
| A Description |  |
| $\checkmark$ Show title |  |
| Navigator |  |
| $\square$ Back／forward buttons |  |
| Story size |  |
| Automatic | $\checkmark$ |









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等 Tableau - My first Tableau Workbook


| Tableau Server Sign In | $\times$ |
| :--- | :--- |
| Server: | $\times$ |
|  |  |
|  |  |
|  | Connect |
| Quick Connect | Cancel |
| Tableau Online |  |

Sign in to http://
蓻幸+ableau


| Publish Workbook to Tableau Server |
| :--- |
| Project |
| Default |
| Name |
| My first Tableau Workbook |
| Description |
| Tags |
| Add |
| Refresh Schedule (Full Extract) |
| None |
| Sheets |
| All Edit |
| Sarmissions as project (Default) Edit |
| More Options |
| $\square$ Shources |

## Chapter 10: Formatting in Tableau for Desserts


nok


Tableau - My first Tableau Workbook


File Data Worksheet Dashboard Story Analysis Map


## Format Workbook

Fonts
All
Tableau Book

| Tableau Book |
| :--- |
| Tableau Book |
| Tableau Light |
| Tableau Medium |
| Tableau Regular |
| Tableau Semibold |
| Tahoma |
| Tempos Sans ITC |




Filters

## Formatting within a Worksheet

|  | Product Type |  |  |  |  |
| :--- | :--- | ---: | ---: | ---: | ---: |
| Market Size | Market | Coffee | Espresso | Tea | Tea |
| Major | Central | 43,291 | 45,975 | 33,542 | 29,771 |
| Market | East | 43,520 | 37,617 | 31,508 | 25,615 |
|  | South | 16,488 | 15,174 | 5,748 |  |
|  | West | 24,698 | 34,299 | 22,721 | 15,174 |
| Small | Central | 25,789 | 13,726 | 34,346 | 38,605 |
| Market | East | 13,121 | 10,780 | 9,853 | 6,562 |
|  | South | 16,771 | 29,816 | 19,929 |  |
|  | West | 33,150 | 35,609 | 49,567 | 57,046 |





T SUM(Sales)

| Market Size | Market | Product Type |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  | Coffee | Espresso | Herbal Tea | Tea | Grand Total |
| Major <br> Market | Central | 43,291 | 45,975 | 33,542 | 29,771 | 152,579 |
|  | East | 43,520 | 37,617 | 31,508 | 25,615 | 138,260 |
|  | South | 16,488 | 15,174 | 5,748 |  | 37,410 |
|  | West | 24,698 | 34,299 | 22,721 | 15,174 | 96,892 |
|  | Total | 127,997 | 133,065 | 93,519 | 70,560 | 425,141 |
| Small <br> Market | Central | 25,789 | 13,726 | 34,346 | 38,605 | 112,466 |
|  | East | 13,121 | 10,780 | 9,853 | 6,562 | 40,316 |
|  | South | 16,771 | 29,816 | 19,929 |  | 66,516 |
|  | West | 33,150 | 35,609 | 49,567 | 57,046 | 175,372 |
|  | Total | 88,831 | 89,931 | 113,695 | 102,213 | 394,670 |
| Grand Total |  | 216,828 | 222,996 | 207,214 | 172,773 | 819,811 |






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File Data Worksheet Dashboard Story Analysis Map For


## Default

Pane: Automatic $\checkmark$
Header: Automatic $\vee$

Marks
Total
Pane: Automatic $\quad \checkmark$
Header: Automatic

## Grand Total

Pane: Automatic $\vee$

## Filters

T Automatic


T
SUM(Sales

## Tableau - My first Tableau Workbook

File Data Worksheet Dashboard Story Analysis Map Fec



Tableau - My first Tableau Workbook
File Data Worksheet Dashboard Story Analysis Map F.






## Formatting within a Worksheet

| Market Size | Market | Product Type |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  | Coffee | Espresso | Herbal Tea | Tea | Grand Total |
| Major <br> Market | Central | 43,291 | 45,975 | 33,542 | 29,771 | 152,579 |
|  | East | 43,520 | 37,617 | 31,508 | 25,615 | 138,260 |
|  | South | 16,488 | 15,174 | 5,748 |  | 37,410 |
|  | West | 24,698 | 34,299 | 22,721 | 15,174 | 96,892 |
|  | Total | 127,997 | 133,065 | 93,519 | 70,560 | 425,141 |
| Small <br> Market | Central | 25,789 | 13,726 | 34,346 | 38,605 | 112,466 |
|  | East | 13,121 | 10,780 | 9,853 | 6,562 | 40,316 |
|  | South | 16,771 | 29,816 | 19,929 |  | 66,516 |
|  | West | 33,150 | 35,609 | 49,567 | 57,046 | 175,372 |
|  | Total | 88,831 | 89,931 | 113,695 | 102,213 | 394,670 |
| Grand Total |  | 216,828 | 222,996 | 207,214 | 172,773 | 819,811 |

## Tableau - My first Tableau Workbook

File Data Worksheet Dashboard Story Analysis Map Format S

Sheet Row Borders limns

Default

| Cell: | None |  |
| ---: | :--- | ---: |
| Pane: | None |  |
| Header: | None | $\checkmark$ |
|  |  |  |

Total
Pane:


## Filters




| iii Columns Product Type |  |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| : $=$ Rows | Market Size |  |  |  |  |  |
| Formatting within a Worksheet |  |  |  |  |  |  |
| Product Type |  |  |  |  |  |  |
| Market Size | Market | Coffee | Espresso | Herbal Tea | Tea | Grand Total |
| Major <br> Market | Central | 43,291 | 45,975 | 33,542 | 29,771 | 152,579 |
|  | East | 43,520 | 37,617 | 31,508 | 25,615 | 138,260 |
|  | South | 16,488 | 15,174 | 5,748 |  | 37,410 |
|  | West | 24,698 | 34,299 | 22,721 | 15,174 | 96,892 |
|  | Total | 127,997 | 133,065 | 93,519 | 70,560 | 425,141 |
| Small Market | Central | 25,789 | 13,726 | 34,346 | 38,605 | 112,466 |
|  | East | 13,121 | 10,780 | 9,853 | 6,562 | 40,316 |
|  | South | 16,771 | 29,816 | 19,929 |  | 66,516 |
|  | West | 33,150 | 35,609 | 49,567 | 57,046 | 175,372 |
|  | Total | 88,831 | 89,931 | 113,695 | 102,213 | 394,670 |
| Grand Total |  | 216,828 | 222,996 | 207,214 | 172,773 | 819,811 |

Tableau - My first Tableau Workbook
File Data Worksheet Dashboard Story Analysis Map Format'




Tableau - My first Tableau Workbook



Formatting within a Worksheet

| Market Size | Market | Prc - |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  | Coffee | Espresso | H. Sort a | Sort ascending <br> Sort descending | Grand Total |
| Major Market | Central | \$43,291.00 | \$45,975.00 |  |  | \$152,579.00 |
|  |  |  |  | \$- Forma | Format... |  |
|  | East | \$43,520.00 | \$37,617.00 | \$3 Hide Fi | Hide Field Labels for Columns | \$138,260.00 |
|  | South | \$16,488.00 | \$15,174.00 | \$5,748.00 |  | \$37,410.00 |
|  | West | \$24,698.00 | \$34,299.00 | \$22,721.00 | \$15,174.00 | \$96,892.00 |
|  | Total | \$127,997.00 | \$133,065.00 | \$93,519.00 | \$70,560.00 | \$425,141.00 |
| Small Market | Central | \$25,789.00 | \$13,726.00 | \$34,346.00 | \$38,605.00 | \$112,466.00 |
|  | East | \$13,121.00 | \$10,780.00 | \$9,853.00 | \$6,562.00 | \$40,316.00 |
|  | South | \$16,771.00 | \$29,816.00 | \$19,929.00 |  | \$66,516.00 |
|  | West | \$33,150.00 | \$35,609.00 | \$49,567.00 | \$57,046.00 | \$175,372.00 |
|  | Total | \$88,831.00 | \$89,931.00 | \$113,695.00 | \$102,213.00 | \$394,670.00 |
| Grand Total |  | \$216,828.00 | \$222,996.00 | \$207,214.00 | \$172,773.00 | \$819,811.00 |


| Pages |  |  | iii Columns Product Type |  |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  |  |  | : $=$ Rows Market Size |  |  | Market |  |  |  |
| Filters |  |  | Formatting within a Worksheet |  |  |  |  |  |  |
|  |  |  | Market Size | Market | Coffee | Espresso | Herbal Tea | Tea | Grand Total |
| Marks |  |  | Major Market | Central | \$43,291.00 | \$45,975.00 | \$33,542.00 | \$29,771.00 | \$152,579.00 |
| T Automatic |  |  |  | East | \$43,520.00 | \$37,617.00 | \$31,508.00 | \$25,615.00 | \$138,260.00 |
| $\begin{gathered} : 8 \\ \text { Color } \end{gathered}$ | $\underset{\text { Size }}{\bigcirc}$ | $\frac{\square}{\text { Text }}$ |  | South | \$16,488.00 | \$15,174.00 | \$5,748.00 |  | \$37,410.00 |
| $\begin{gathered} \therefore \circ \\ \text { Detail } \end{gathered}$ |  |  |  | West | \$24,698.00 | \$34,299.00 | \$22,721.00 | \$15,174.00 | \$96,892.00 |
|  |  |  |  | Total | \$127,997.00 | \$133,065.00 | \$93,519.00 | \$70,560.00 | \$425,141.00 |
|  |  |  | Small Market | Central | \$25,789.00 | \$13,726.00 | \$34,346.00 | \$38,605.00 | \$112,466.00 |
|  |  |  |  | East | \$13,121.00 | \$10,780.00 | \$9,853.00 | \$6,562.00 | \$40,316.00 |
|  |  |  |  | South | \$16,771.00 | \$29,816.00 | \$19,929.00 |  | \$66,516.00 |
|  |  |  |  | West | \$33,150.00 | \$35,609.00 | \$49,567.00 | \$57,046.00 | \$175,372.00 |
|  |  |  |  | Total | \$88,831.00 | \$89,931.00 | \$113,695.00 | \$102,213.00 | \$394,670.00 |
|  |  |  | Grand Total |  | \$216,828.00 | \$222,996.00 | \$207,214.00 | \$172,773.00 | \$819,811.00 |



## Tableau - My first Tableau Workbook






## $\checkmark$ Show mark labels

Label Appearance


Font: Tableau Regular, 9.. $\vee$


Marks to Label


Field
$\square$
Automatic $\checkmark$

Options
$\square$ Allow labels to overlap other marks
$\square$ Label minimum value
$\checkmark$ Label maximum value



| Edit Annotation |  |  |  |  |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| Tableau Regular | $\checkmark$ | $11 \checkmark$ | B | $I$ | $\underline{\text { U }}$ | 三 | \# | Insert ${ }^{-}$ | $x$ |
| Highest number of Earthquakes |  |  |  |  |  |  |  |  |  |






大at Tableau - My first Tableau Workbook



| iii Columns | ¥ YEAR(Date) |
| :--- | :--- |
| $:$ Rows | SUM(Number of Recor... |

Formatting Labels \& Annotations








Subcategory wise Profit
Sub-Catego..
Copiers
Phones
Accessories
Paper
Chairs
Storage
Envelopes
Art



## Title



## Caption



## Subcategory wise Profit









