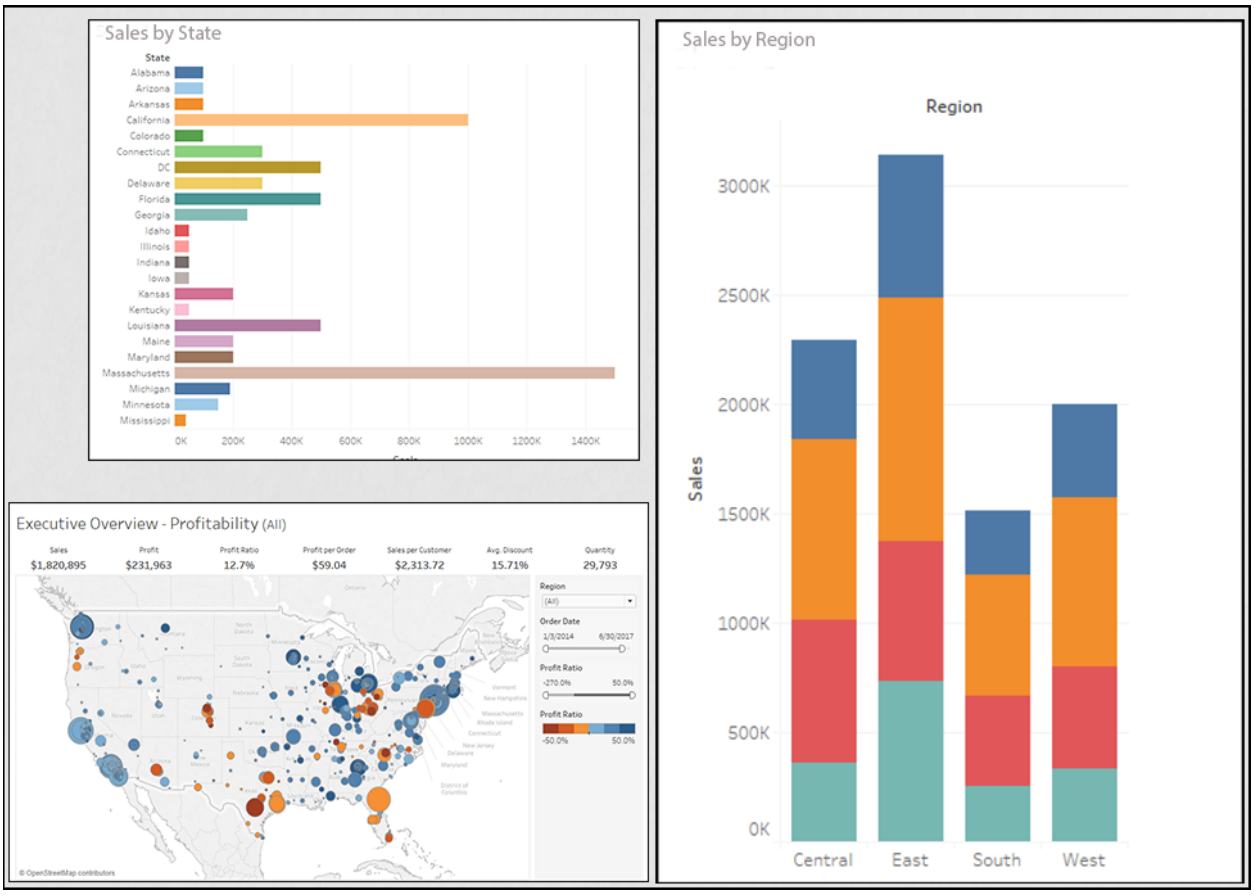
Tableau

Open a Data Source



This document contains instructions to help the new *Tableau* user review open data sources.

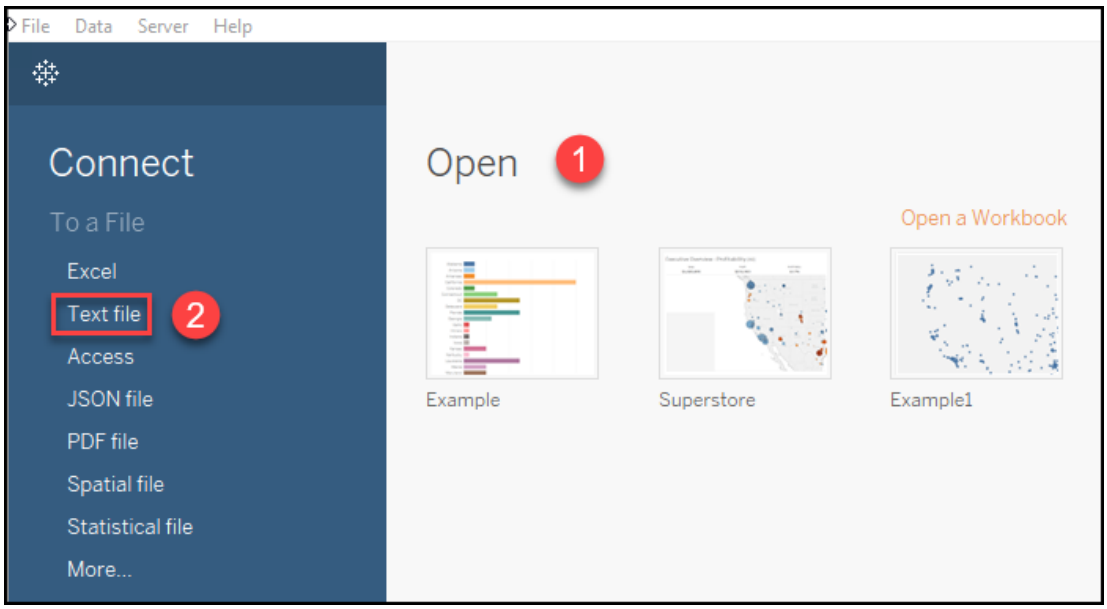
COMMON TERMS

If you work with data, you probably already know many common terms. However, the meaning of these terms varies from application to application. For example, in *Alteryx*, you **input data** and a chart really is a chart, such as a pie chart. In *Tableau*, you **connect to data** and a chart or any other graphic is a **visualization**. Terms like drill down and blend data have meanings that vary from application to application. Below is a list of terms as used in *Tableau*.

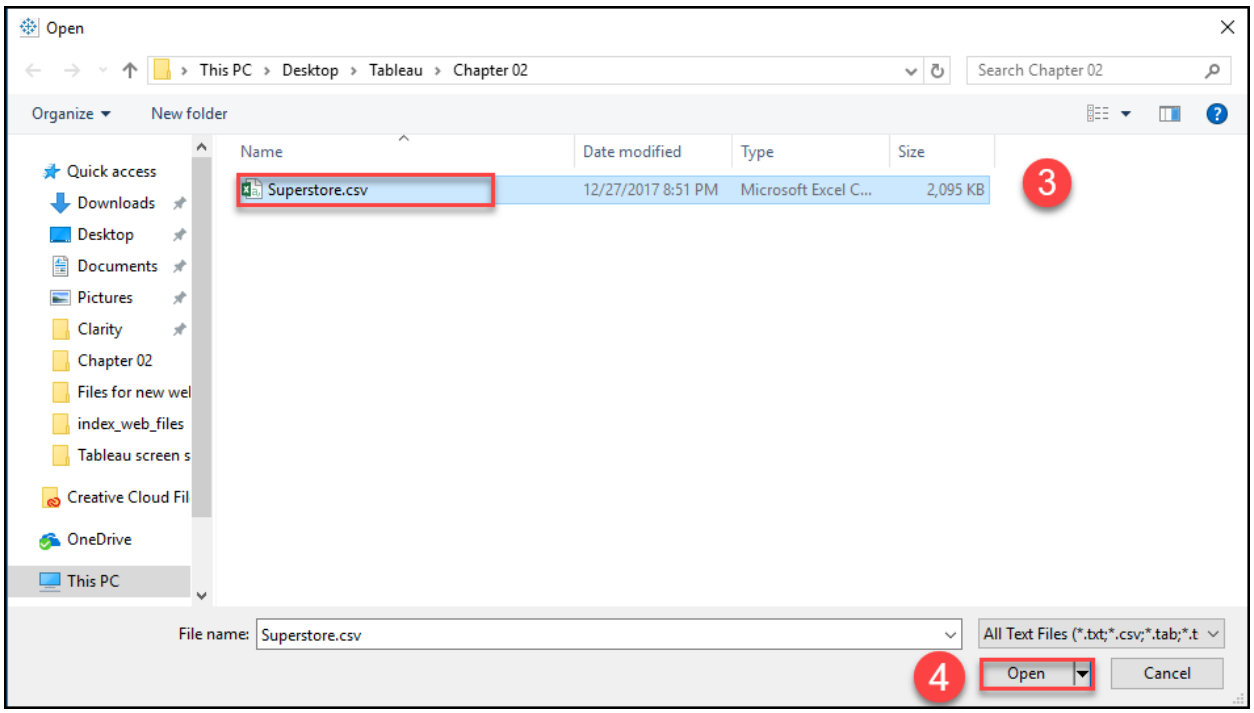
- **Connect to data**: To access or open a file.
- **Dashboard**: A presentation with multiple visualizations arranged together. Often, some of the visualizations allow the user to interact with data.
- **Data Source**: Often called a **dataset** in analysis. Technically the difference between the two is that a dataset contains data that is gathered over many years (**long-term data**). For practical purposes, most people use the terms interchangeably. A data source can be an *Excel* spreadsheet or an entire data warehouse. With big data, you have to limit the number of records *Tableau* can accept.
- **Data Type**: A designation as to the type of data, such as numeric, string, or date. See **Dimensions**, below.
- **Dimensions**: In short, descriptions or labels. The difference between dimensions and measures can be confusing, especially, when it comes to numbers. You can use a number as a label, for example an item number or an ID number. Room 24 is a label that has no numeric value as is Customer ID. Many times, dimensions describe or label measures, but that is not always the case. However, *Tableau* initially processes every number as a measure. To ensure you can join tables or perform calculations, you must change the data type so that columns match.
- **Measures**: Data that is numeric and can be summed, averaged, or counted. If you can add and subtract it, the value is a measure.
- **Shelf**: A filter or a feature that allows you to add color, text, and sums and other information to a visualization.
- **Visualization**: The way *Tableau* presents data, such as a bar chart, a line graph, or a map.
- **Worksheet**: The work area, also called **sheet** or **view**.

SCREEN OVERVIEW

Before you start, you must have access to data that *Tableau* can process. In this case, you will use a **.csv** file. For practice you can use an *Excel* spreadsheet, a *Google* sheet, or a .csv file. Additional setup is required when you use *Google* sheets for the first time.

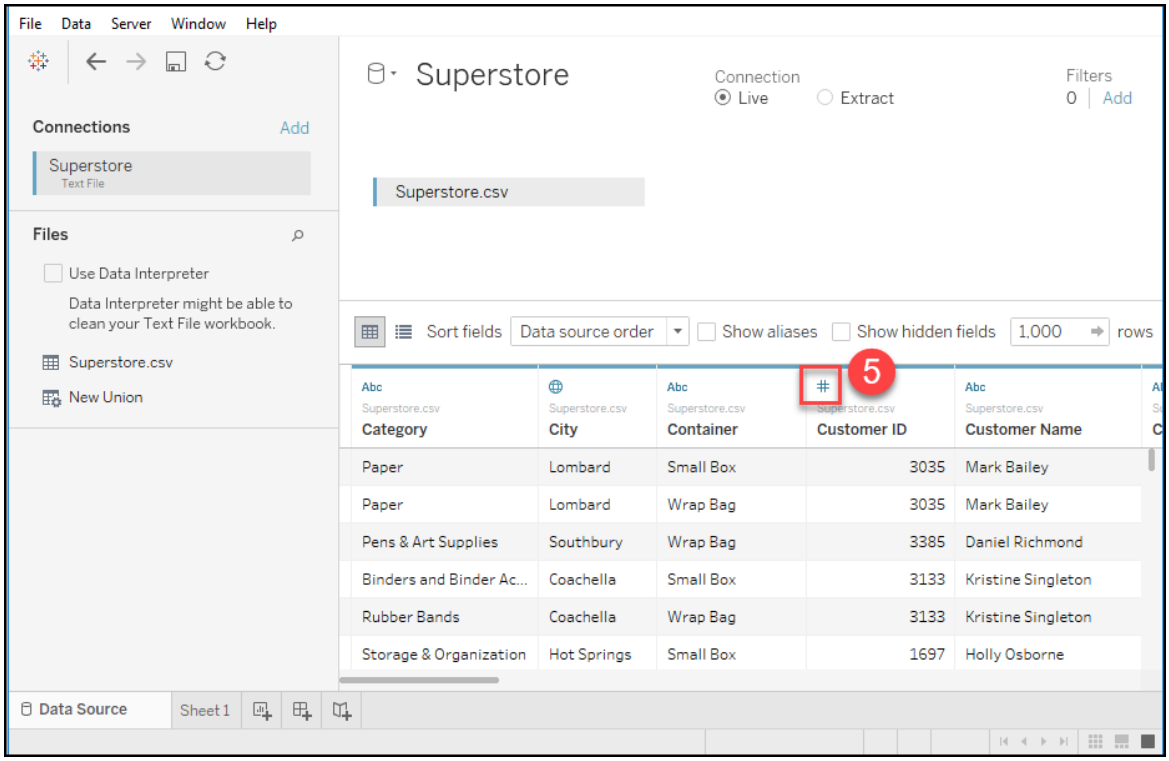


1. Open *Tableau*.
2. Select **Text File**.

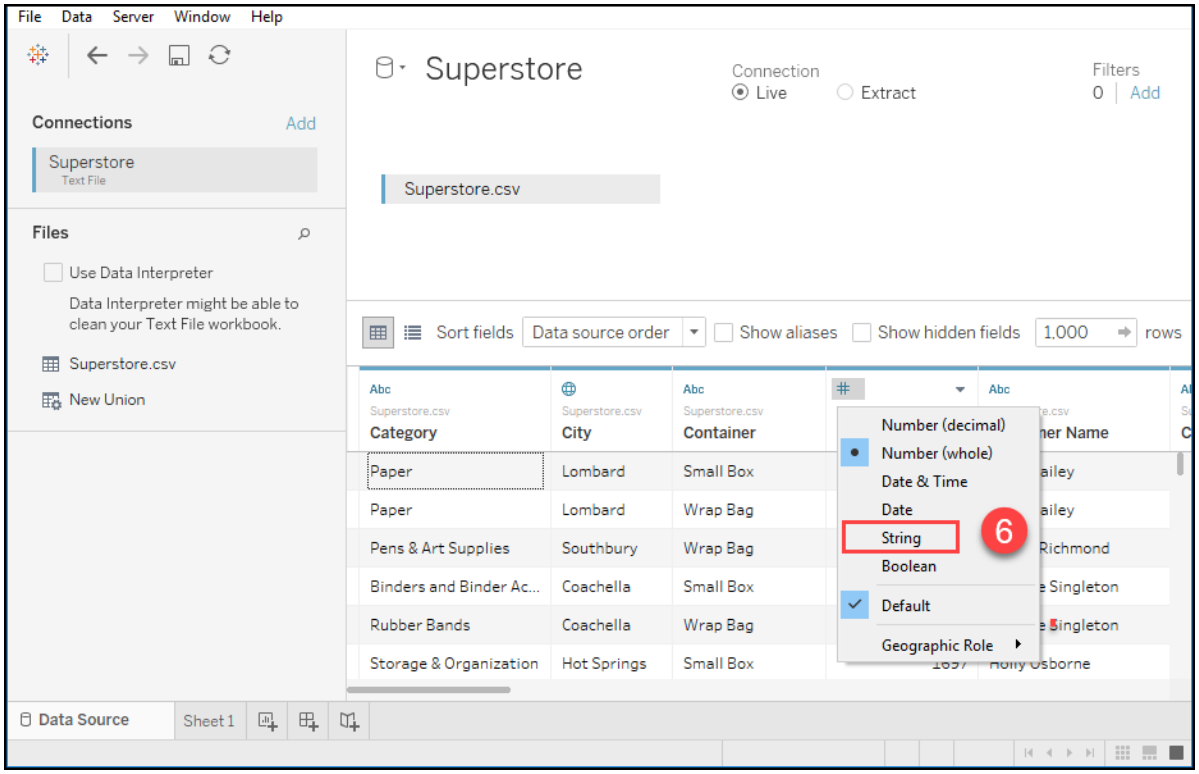


3. Navigate to the correct file and select it.
4. Click **Open**.

The data source opens. Since **Customer ID** is a label, not a number, change it to string.

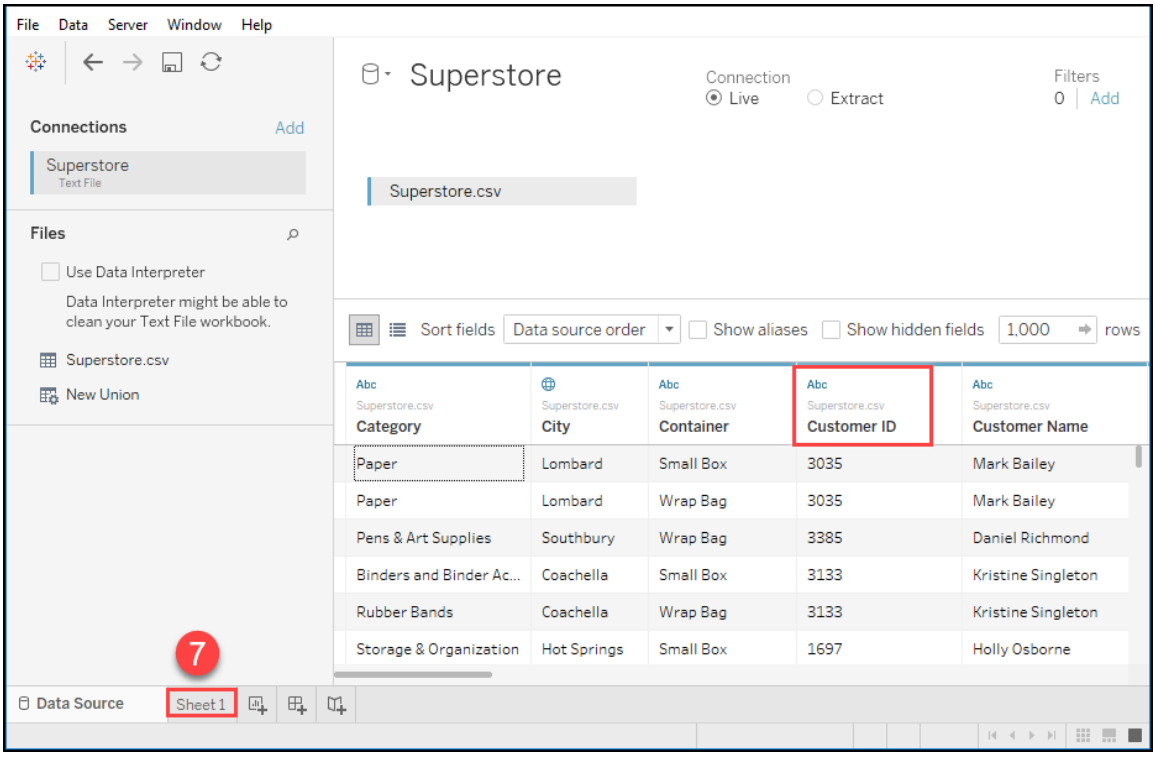


5. Click the **number sign** above the **Customer ID** column.



6. Select **String**.

Notice that the symbol above Customer ID has changed to **abc**, indicating that the data type is now a string. When you work with this field, *Tableau* will now handle it as a dimension instead of a measure. Now change from the data source to a worksheet.



7. Click **Sheet 1**. The worksheet opens. To examine the interface, see the callouts.