Getting Started with Tableau Desktop

Welcome to Tableau Desktop 8.1. In this guide you can follow along using sample data to learn how to connect to data and build views.

1. Connect to Data

2. Create Your First View

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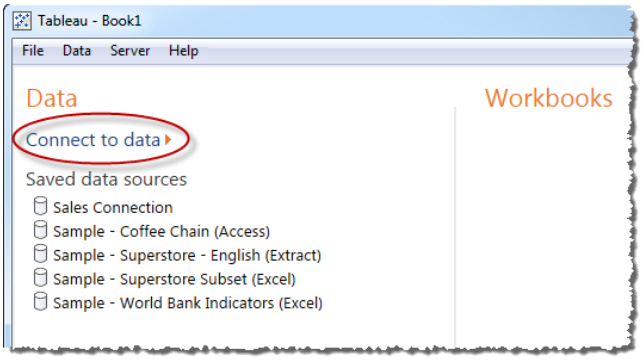
Connect to Data

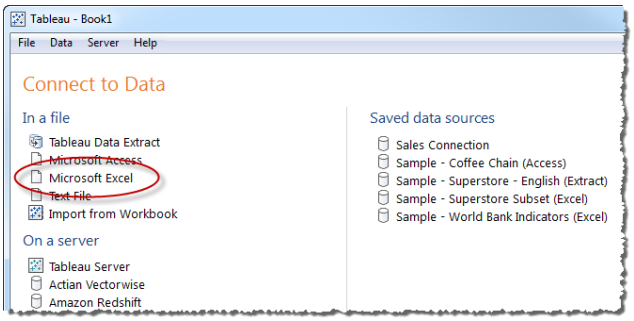
The first thing to do when you start Tableau is connect to a data source. Follow the steps below to connect to a sample Excel workbook that comes with Tableau.

1 Select Connect to Data on the start page.



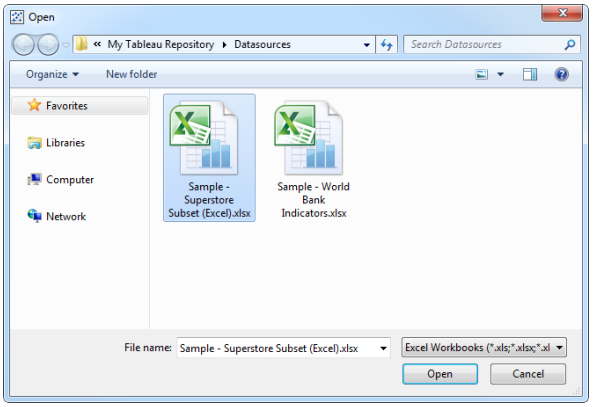
2 Select the type of data source.

For this example, select **Microsoft Excel**.



3 Open the the data file.

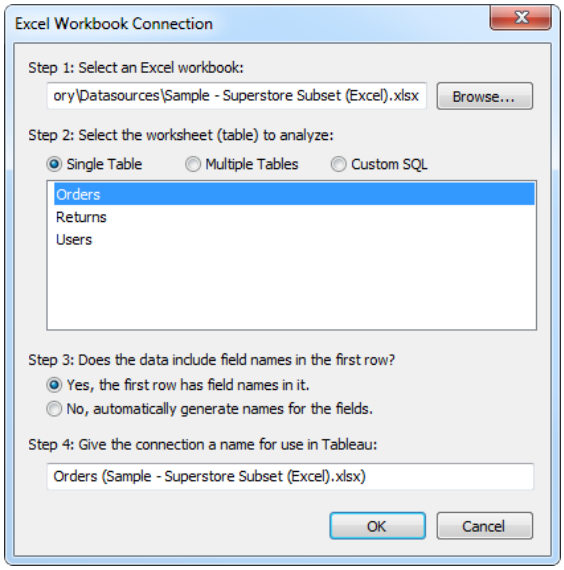
Navigate to the the **Sample-Superstore Subset** workbook located in the Datasources folder in your Tableau Repository. Then click **Open**.



Your Tableau Repository is located in your My Documents folder.

4 Set up the connection.

Select the **Orders** worksheet and click **OK**. When prompted, select the option to **Connect Live**.



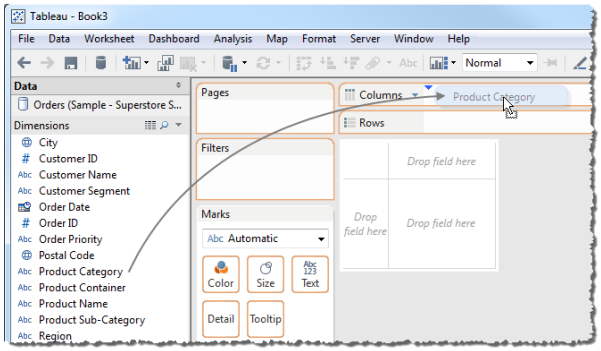
Note: If you are having problems connecting to an Excel workbook of your own, make sure each worksheet is organized into rows and columns properly. To see an example of how to set up your Excel data, open the sample file that comes with Tableau. You can find it in your documents folder located at: **My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

Create Your First View

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

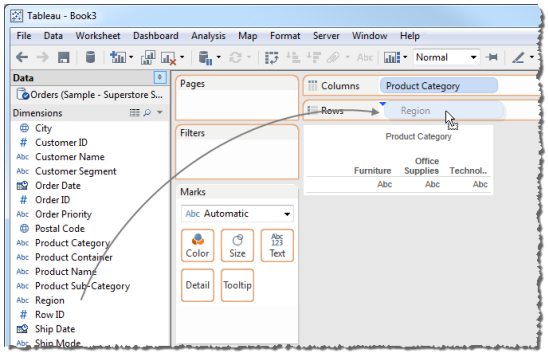
1 Drag a dimension to the Columns shelf.

Click and drag the **Product Category** field and drop it on the **Columns** shelf.



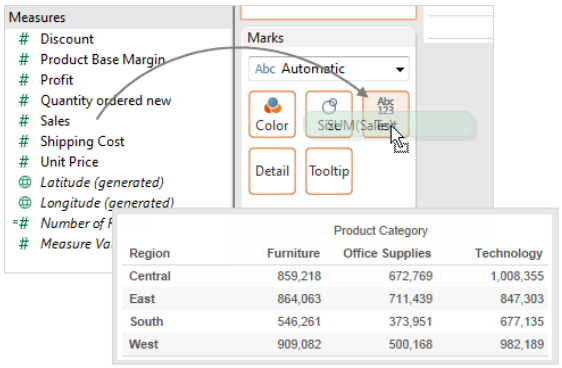
2 Drag a dimension to the Rows shelf.

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



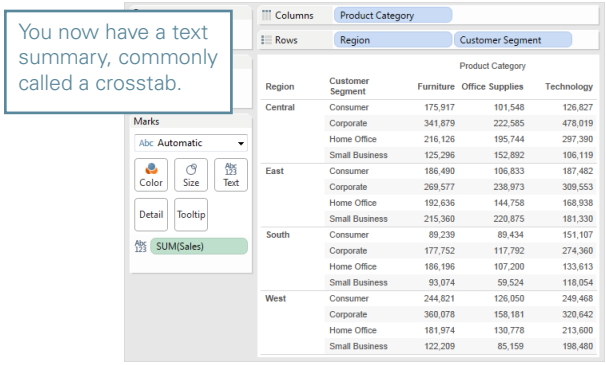
3 Drag a measure to Text.

Click and drag the **Sales** measure and drop it on **Text** on the Marks card.



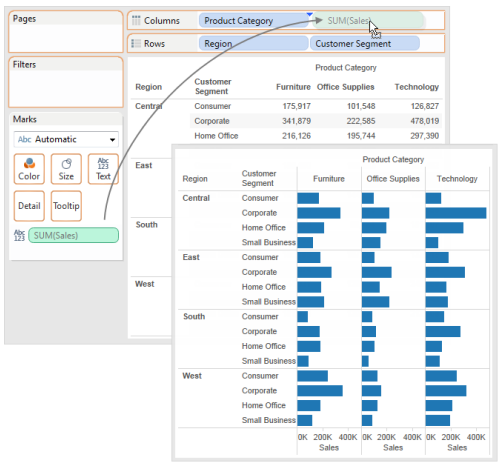
4 Drag another dimension to the Rows shelf.

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



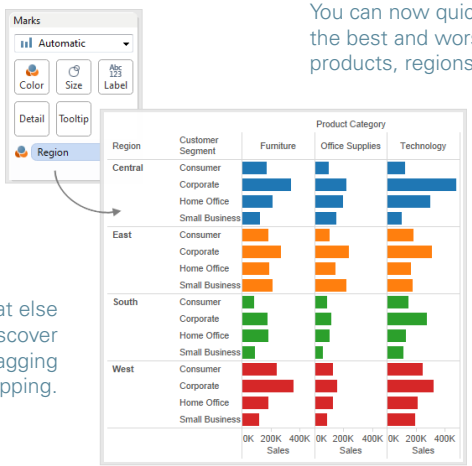
5 Visualize your data.

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



6 Use color to show more information.

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



Learn More About Tableau

Live Online Training

Tableau offers FREE live training on the web.
Tune in to learn more!

Register Now!
visit http://www.tableausoftware.com/learn/training

Check out these additional resources on the Help menu:

Help > Get Help & Support
Browse the Product Help, Knowledge Base, and Community discussions on the Tableau website.

Help > Sample Gallery
The sample gallery contains samples that highlight some of the amazing things you can do with Tableau.