

Getting Started with Tableau Desktop

Welcome to Tableau Desktop 9.0. Follow along with this guide to learn how to connect to data, build views, and create a story using sample data.

1. [Connect to Data](#)

2. [Build a View](#)

3. [Create a Story](#)

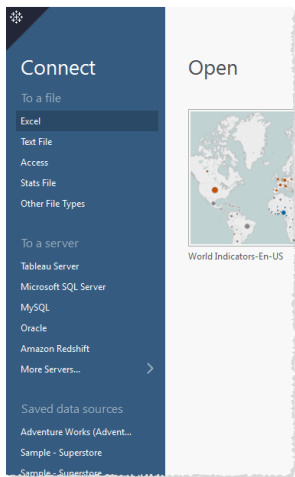
4. [Learn More](#)

Connect to Data

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

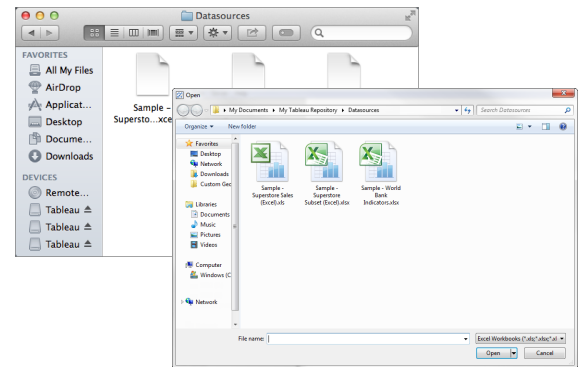
1 Select a data source

On the start page, under **Connect**, select a data source. For this example, click **Excel**.



2 Open the data file

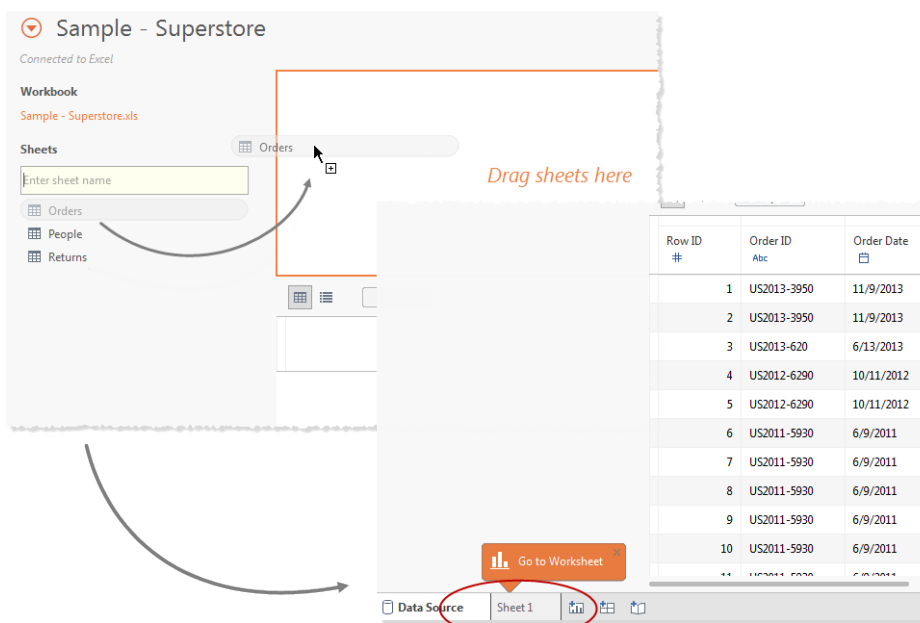
Go to the Datasources folder in My Tableau Repository and open the **Sample - Superstore.xls** file.



My Tableau Repository is located in your **My Documents** folder.

3 Set up the connection

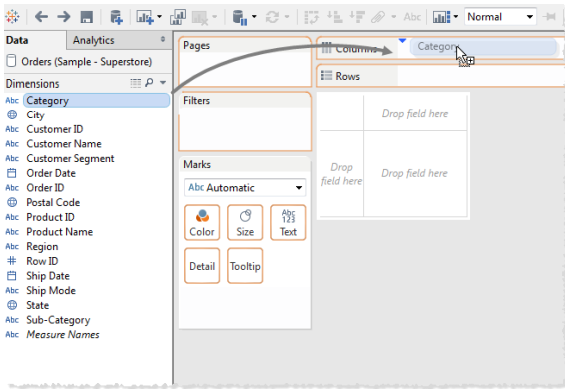
Drag the **Orders** worksheet to the join area, and then click the **Sheet** tab to to start analyzing your data.



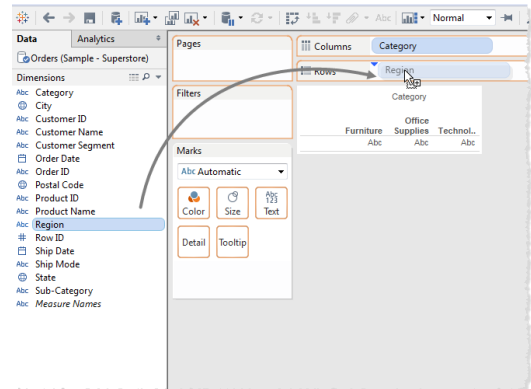
Build a View

After you connect to a data source, fields are displayed in the **Data** pane on the left side of the workbook as dimensions and measures. Create views by dragging fields from the **Data** pane and dropping them onto shelves.

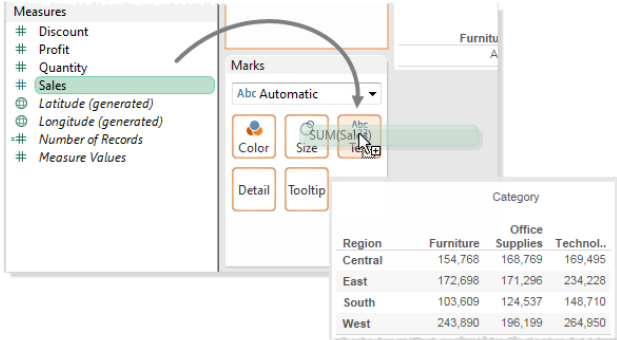
1 Drag a dimension to the **Columns** shelf
Drag **Category** to the **Columns** shelf.



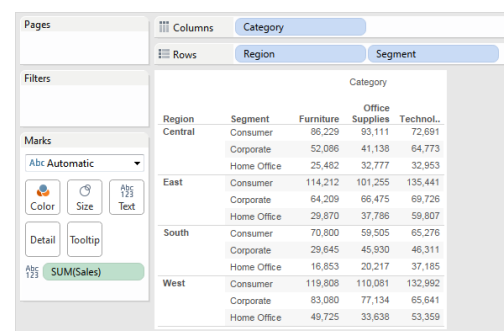
2 Drag a dimension to the **Rows** shelf
Drag **Region** to the **Rows** shelf.



3 Drag a measure to **Text**
Drag **Sales** to **Text** on the Marks card.

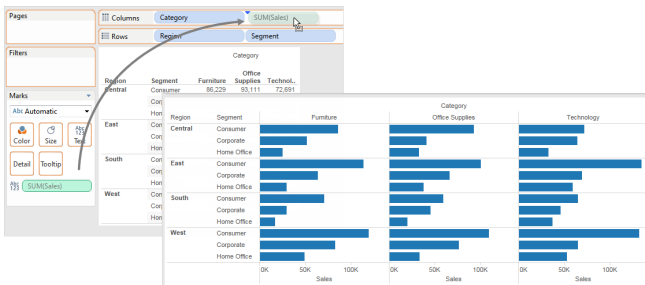


4 Drag another dimension to **Rows**
Drag **Segment** to the **Rows** shelf.



You now have a text summary, or a crosstab view of your data.

5 Visualize your data
From the Marks card, drag **Sales** to the **Columns** shelf.



6 Use color to show more information
From the **Data** pane, drag **Region** to **Color** on the Marks card.

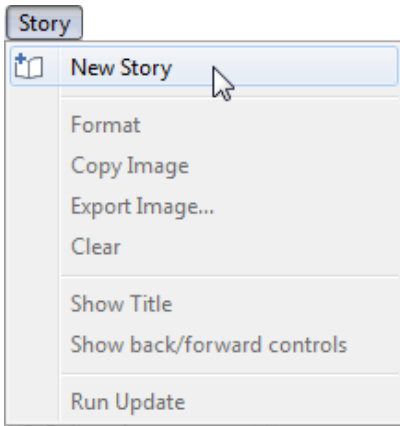


You can now quickly pick out the best and worst performing product categories, regions, and customer segments.

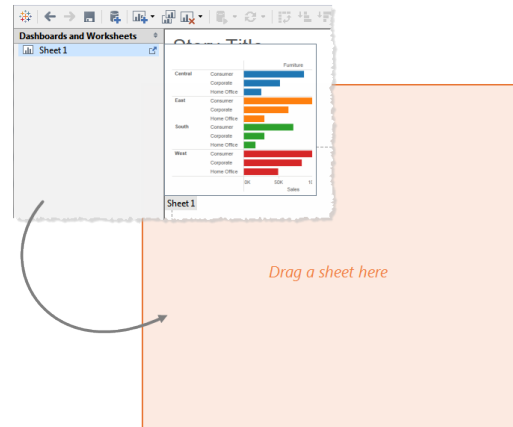
Create a Story

After you create a view, you can present it in a story. With Tableau Story Points, you can show how facts are connected, provide context, and demonstrate how decisions relate to outcomes. Follow the steps below to open a new story and create the first story point.

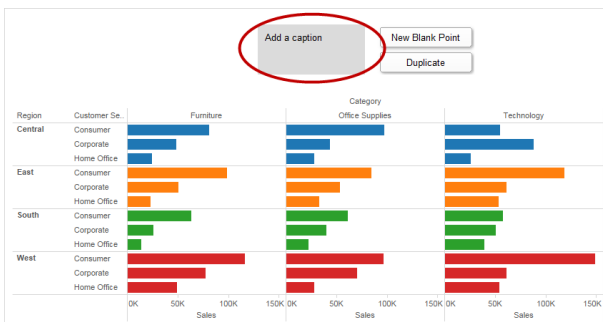
- 1 **Open a new story**
Select **Story > New Story**.



- 2 **Create a story point**
Drag **Sheet 1** from the **Dashboards and Sheets** pane and drop it in the center of the view.

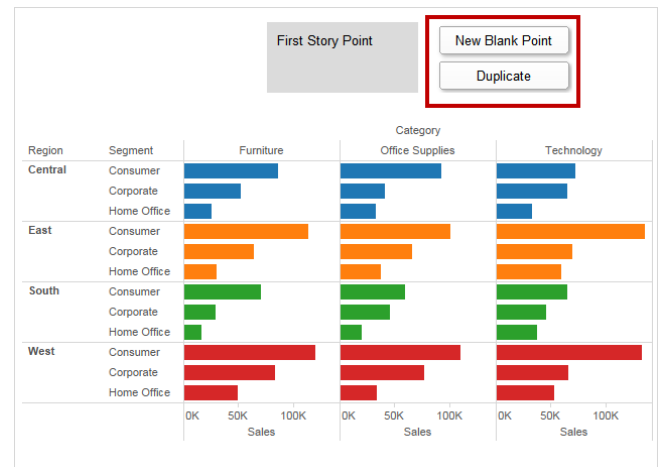


- 3 **Describe the view**
In the navigator, click a story point to add a caption.



You can edit, organize, and annotate all the points in your story using the navigator.

- 4 **Continue the story**
Click **New Blank Point** to add a blank story point or click **Duplicate** to create a copy of the current story point that you can then modify.



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[Learning > Visual Gallery](#)

Browse a gallery of samples that highlight some of the amazing things you can do with Tableau.