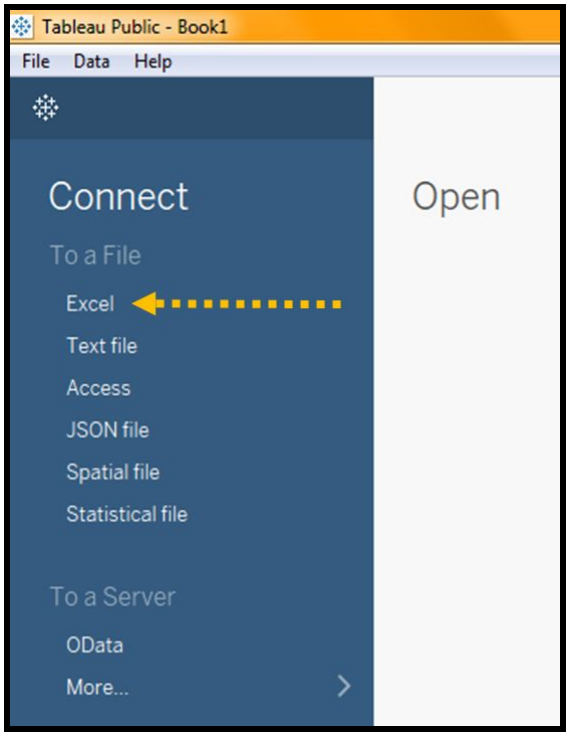
Connecting Excel to Tableau

From Tableau Public

Since you've already created and downloaded Tableau Public, it is now on your computer.

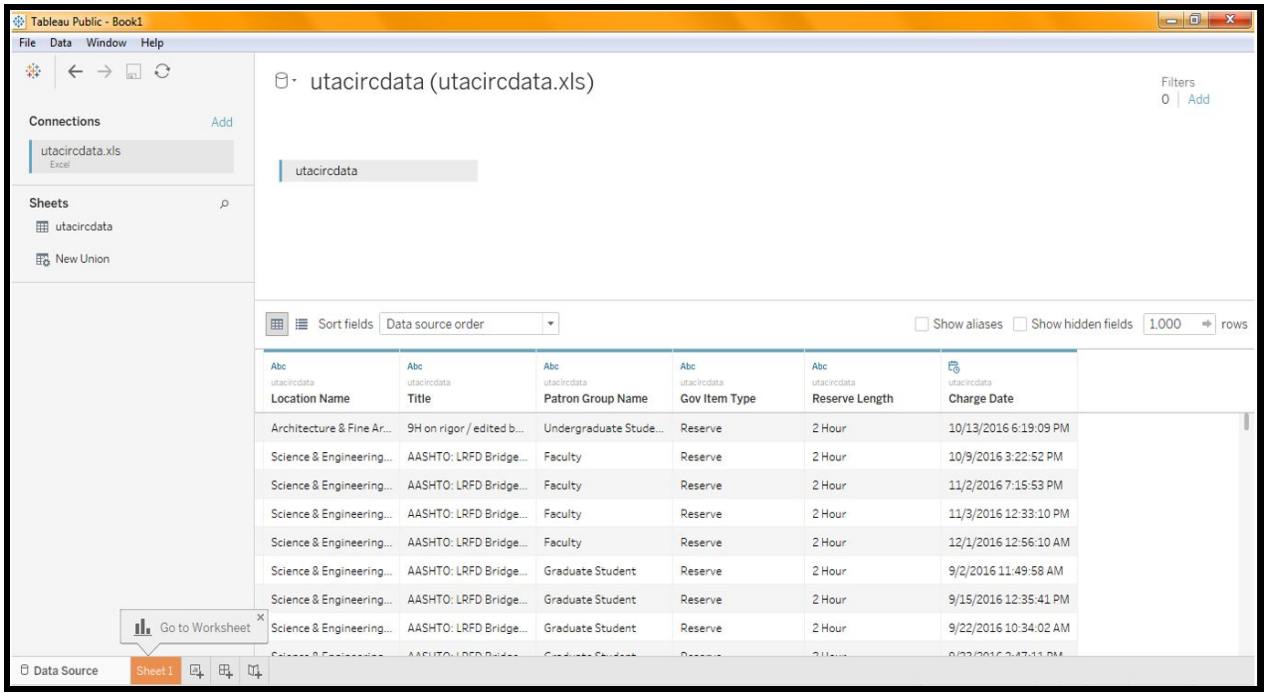
1of3. Open Tableau Public from your desktop.

2of3. Connect to the Excel file containing utacircdata.xls data.

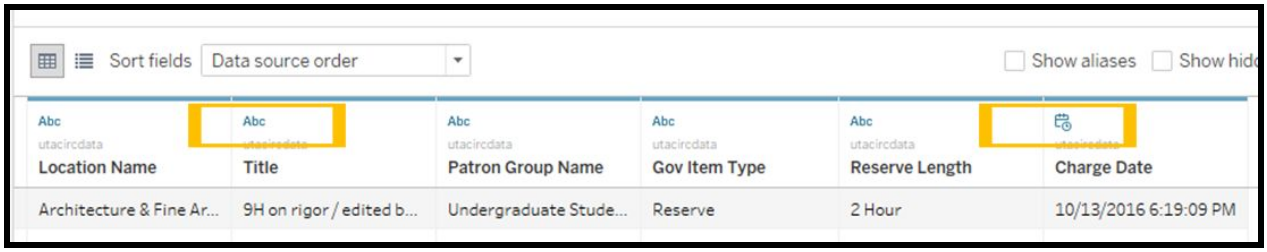


.

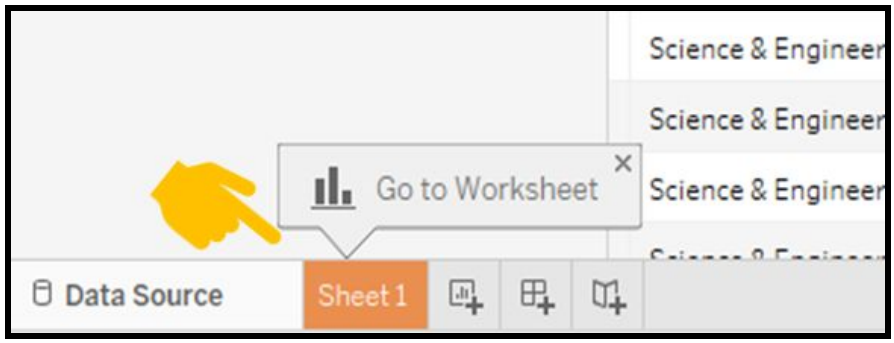
Tableau will open to its Data Source page:



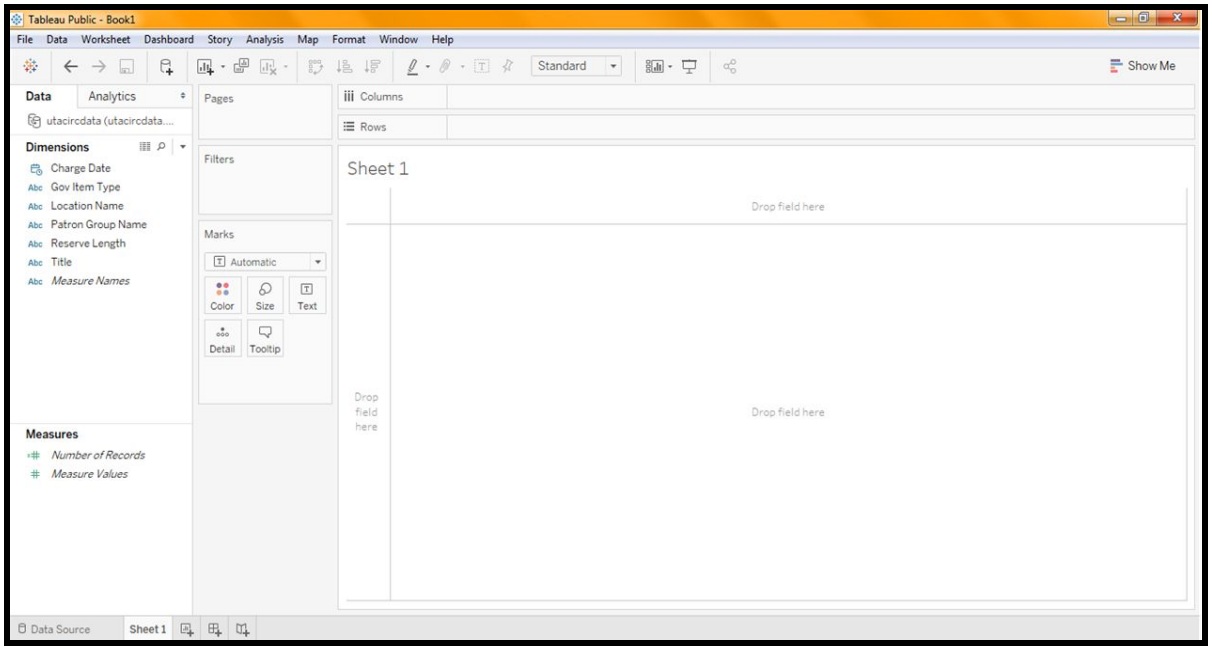
Notice the naming fields:
Tableau has already identified field types for the data (abc = name, calendar icon is for date/time):



3of3. Click Sheet 1 In Tableau on the bottom left:



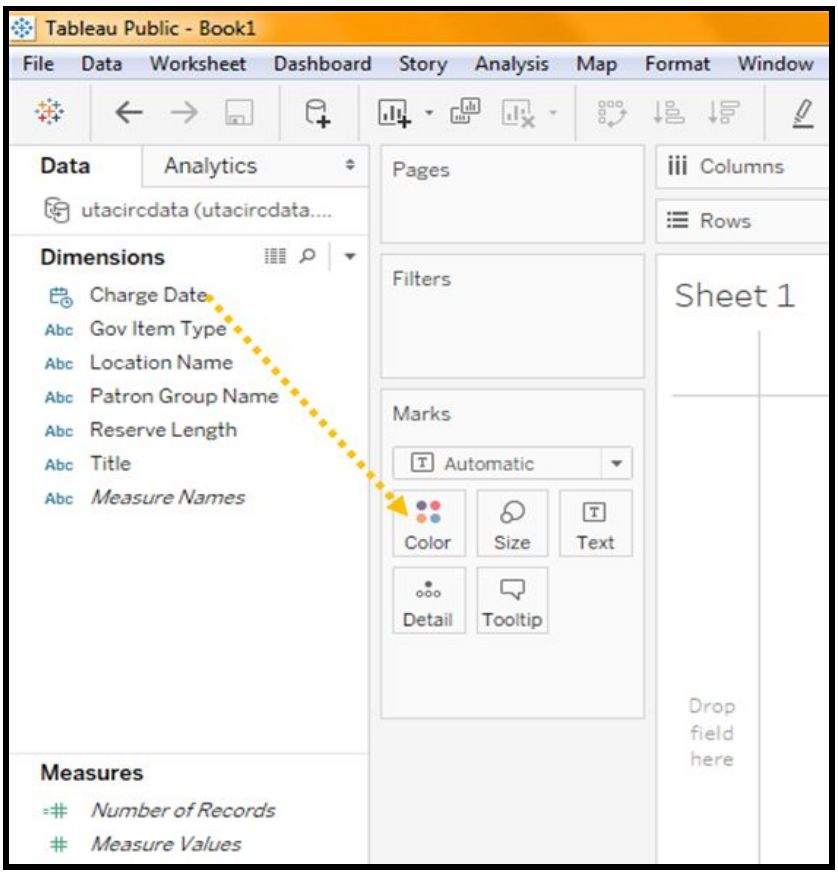
Sheet 1 will look like this:



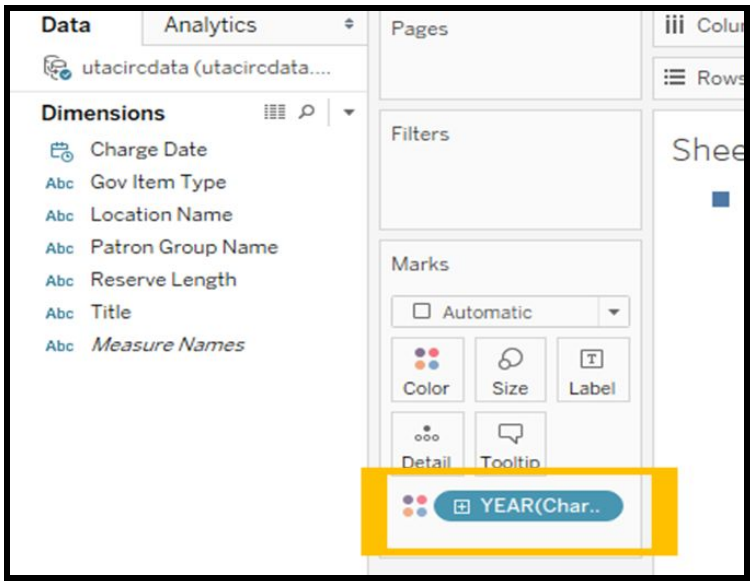
Filtering by Date and Using the Side by Side Graph in Tableau

QUESTION 1: Which location circulated the most resources in any given month in 2016?

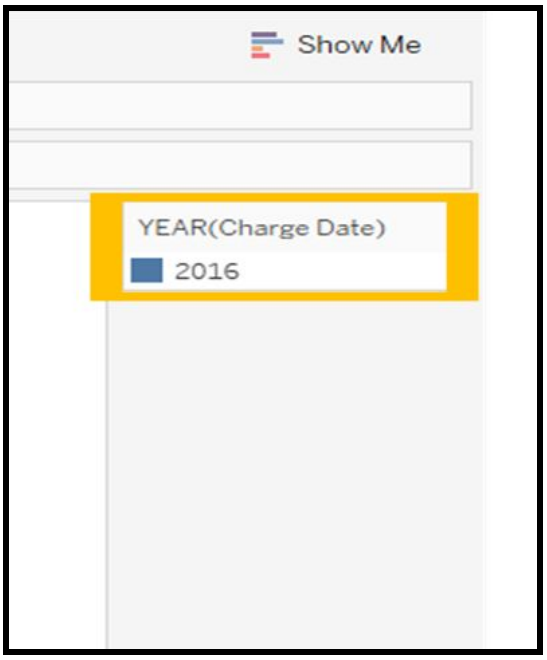
1of7. From Dimensions, drag Charge Date onto Color in the Marks field:



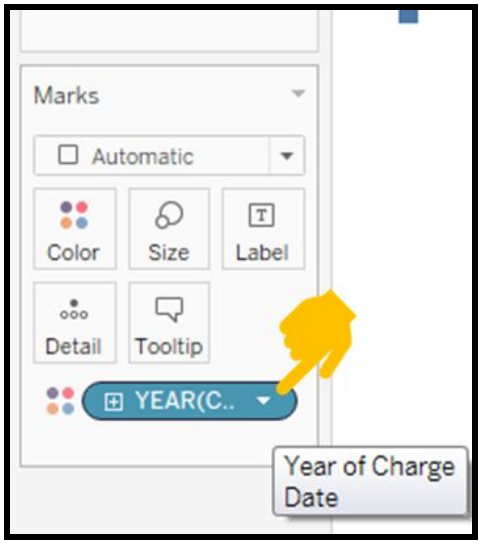
A tab will appear with four colored dots in front in the Marks field.



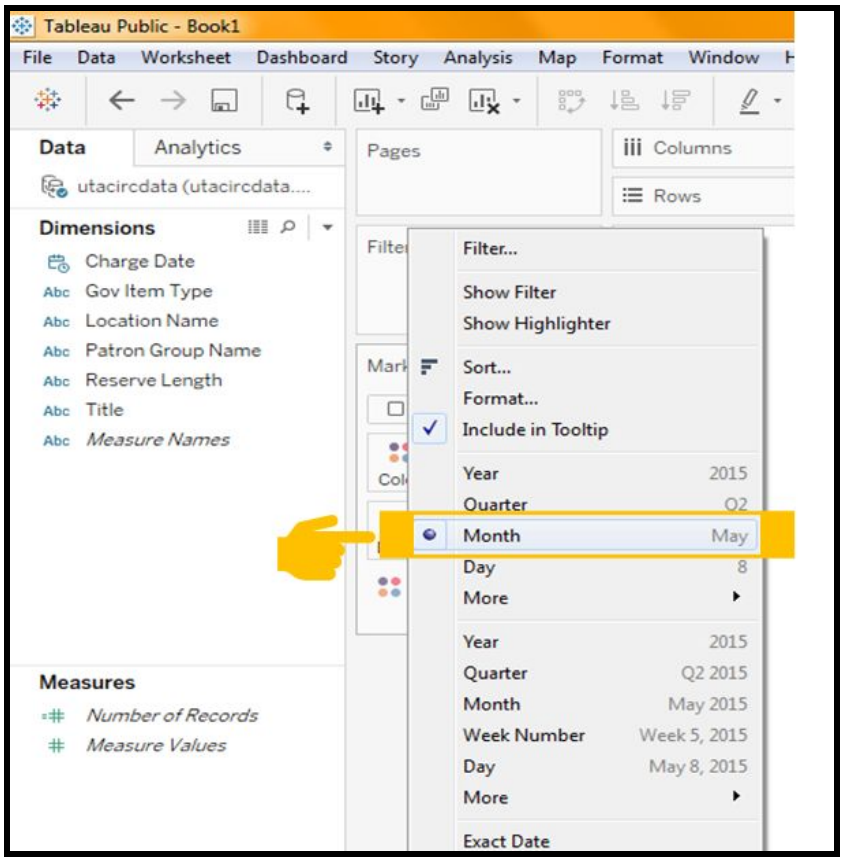
Also, to the far right, a legend with the year will appear:



2of7. Go back to the Marks field and use its drop down menu to choose Month in the first listing (“month” is part of our question).

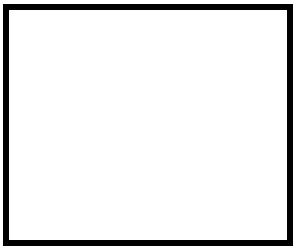


3of7. In the dropdown, choose the first Month:



You will see the months in color on the right as a legend:

There are only 4 months here because UTA's fall semester has 4 months.

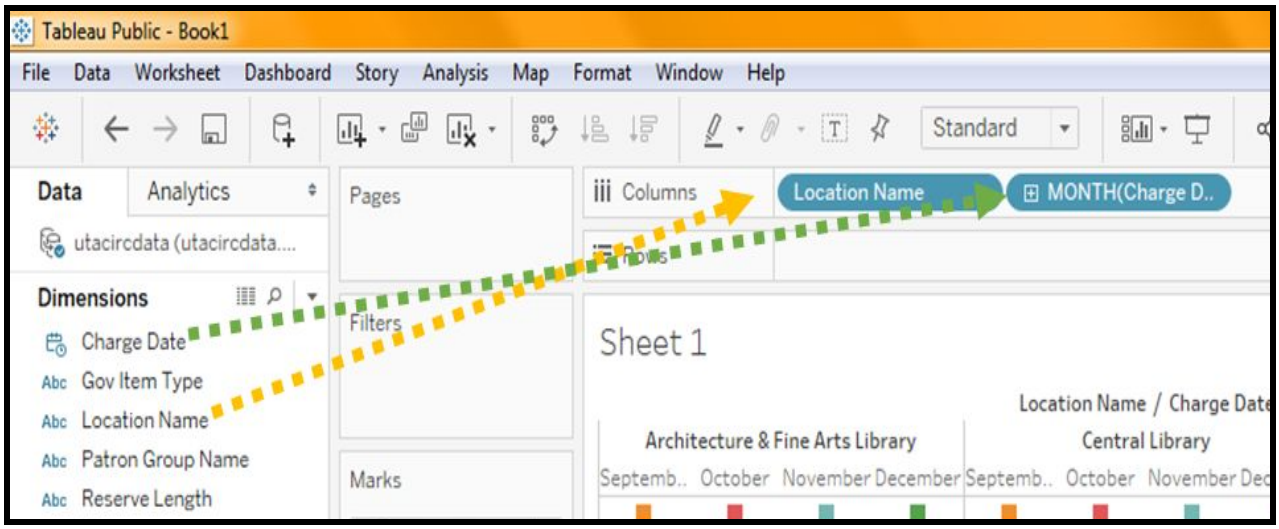


Now, we want to see the different library locations with the months we already chose.

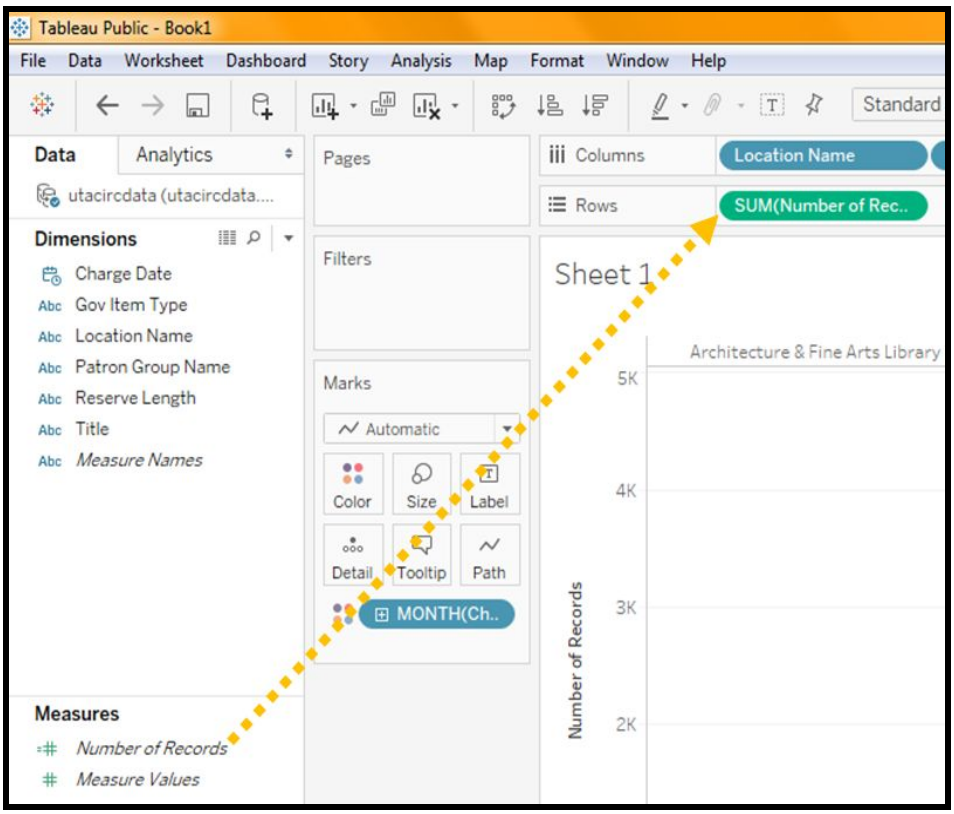
4of7 From Dimensions on the left drag:

- Location Name
- Charge date (change to MONTH again if necessary)

And place them in Columns at the top.



5of7. From the Measures field on the bottom left, drag Number of Records in Rows:



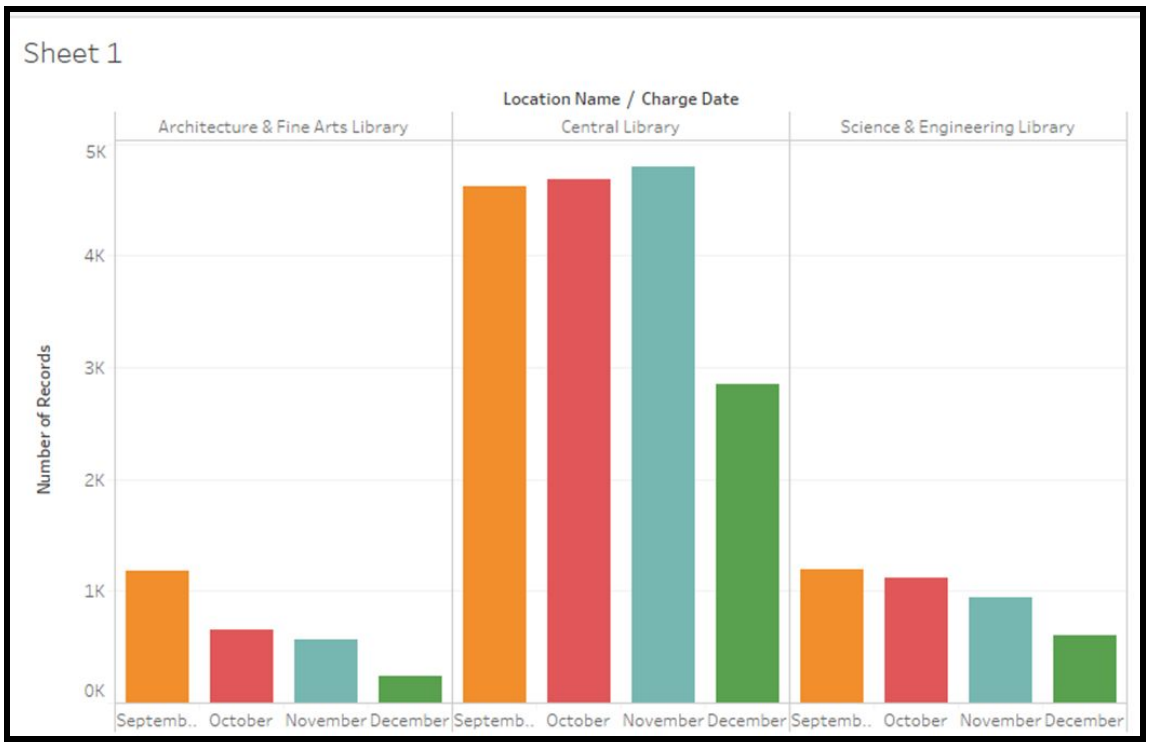
Your viz will look something like this:

6of7. Click the Show Me menu on the right:

7of7. Choose the bar graph to the far right (side by side bars).

The highlighted options are Tableau's way of saying that it's the best viz based on your dataset. The above options may not be applicable to you; this snapshot was taken based on the step I was in during a viz process.

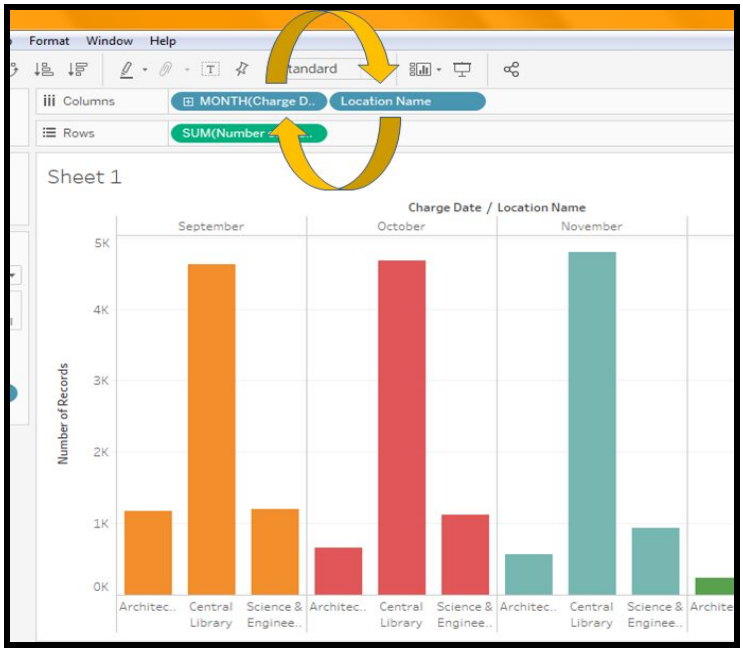
Your Final viz should look something like this:



ANSWER: Overall, Central Library has circulated the most resources in all the months (Sept.-Dec.).

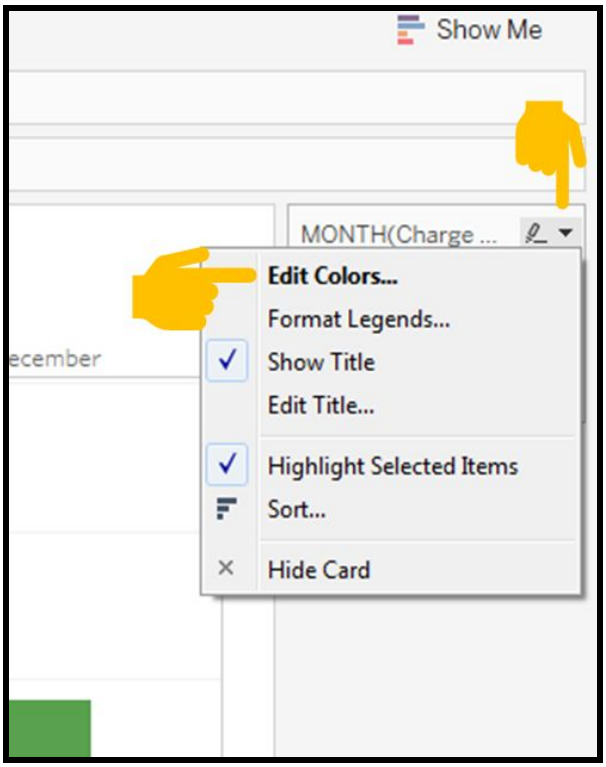
Choose other vizzes from the Show Me tab.

Also, switch (drag) the information in the Columns and Rows fields to see different vizzes.



You can also change the colors:

In the Month legend, choose the dropdown and click change colors.



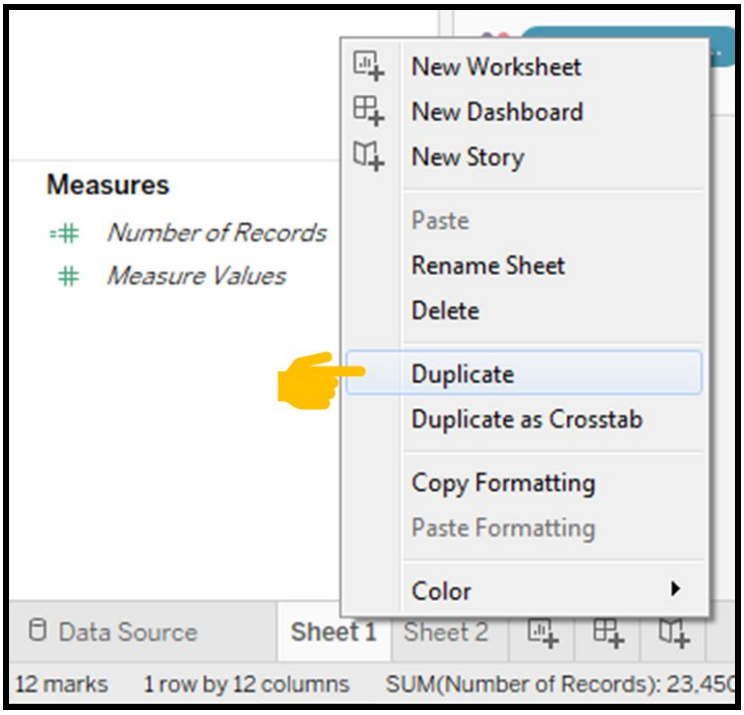
Choose the best viz for answering your question.

SAVE your info.

Filtering and Grouping Using the Horizontal Bar Graph in Tableau

QUESTION 2 : What item types circulated more at Central Library?

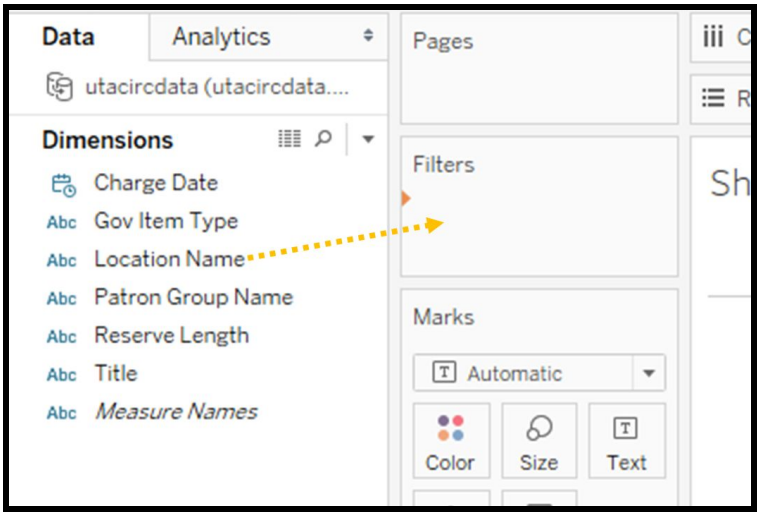
1of5 Duplicate sheet. Right click on Sheet1 and choose Duplicate:
We want to keep (duplicate) what we already have since we are building from that same dataset.



A new sheet will appear (Sheet2) with the exact same data as Sheet1.

Right click on the Sheet to rename.

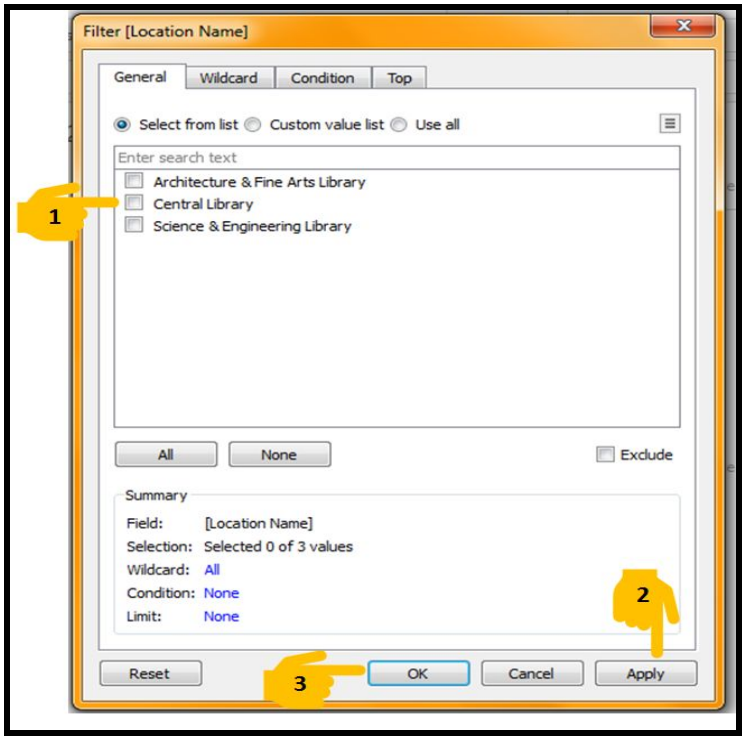
2of5 Drag Location Name to the Filters field:



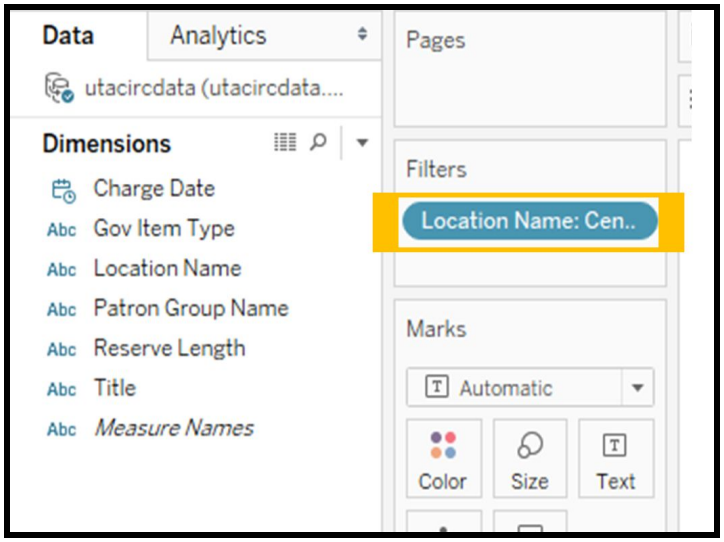
The Filters window will appear:

3of5 Choose Central Library, OK, then Apply:

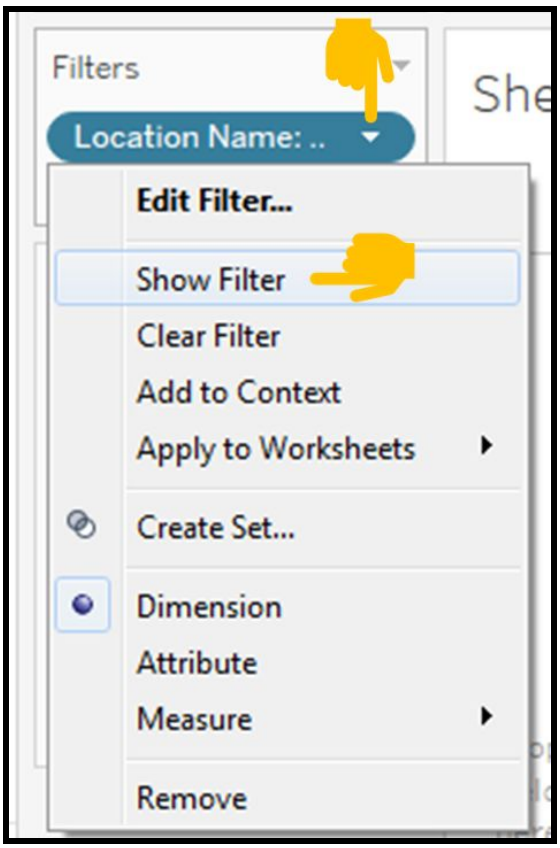
Make sure ONLY Central Library is checked.



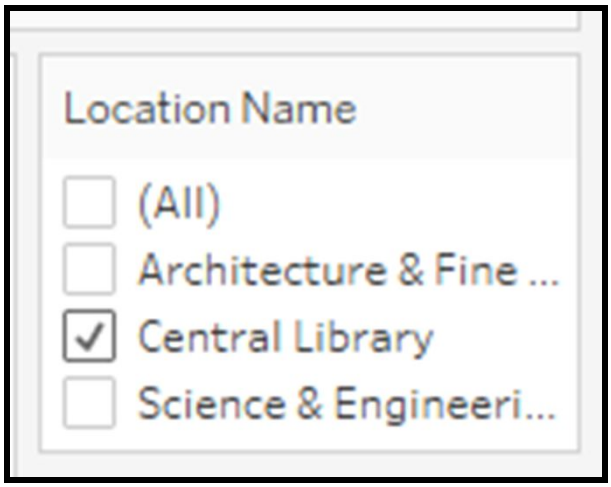
You will see Location Name for Central Library in the Filters field:



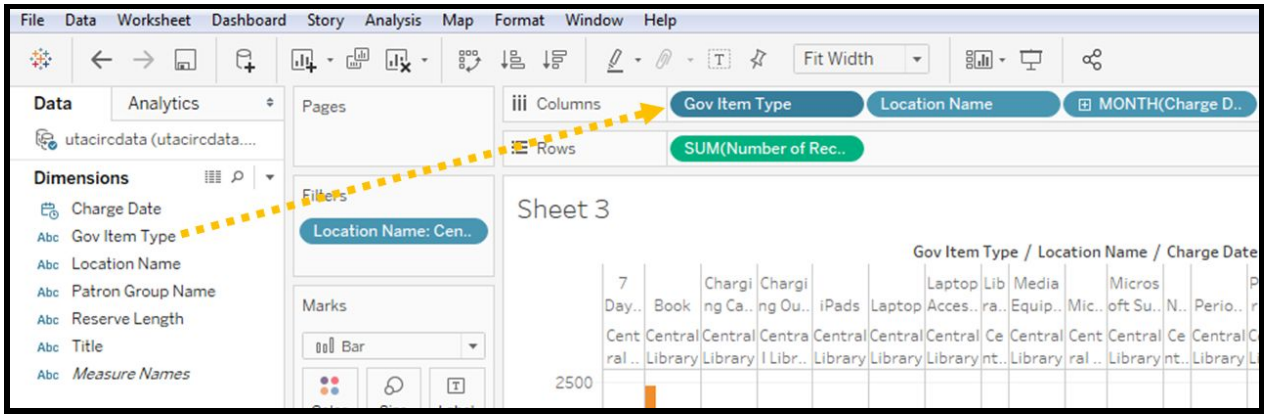
4of5 Choose the dropdown from Location Name in the Filters field and click Show Filter:



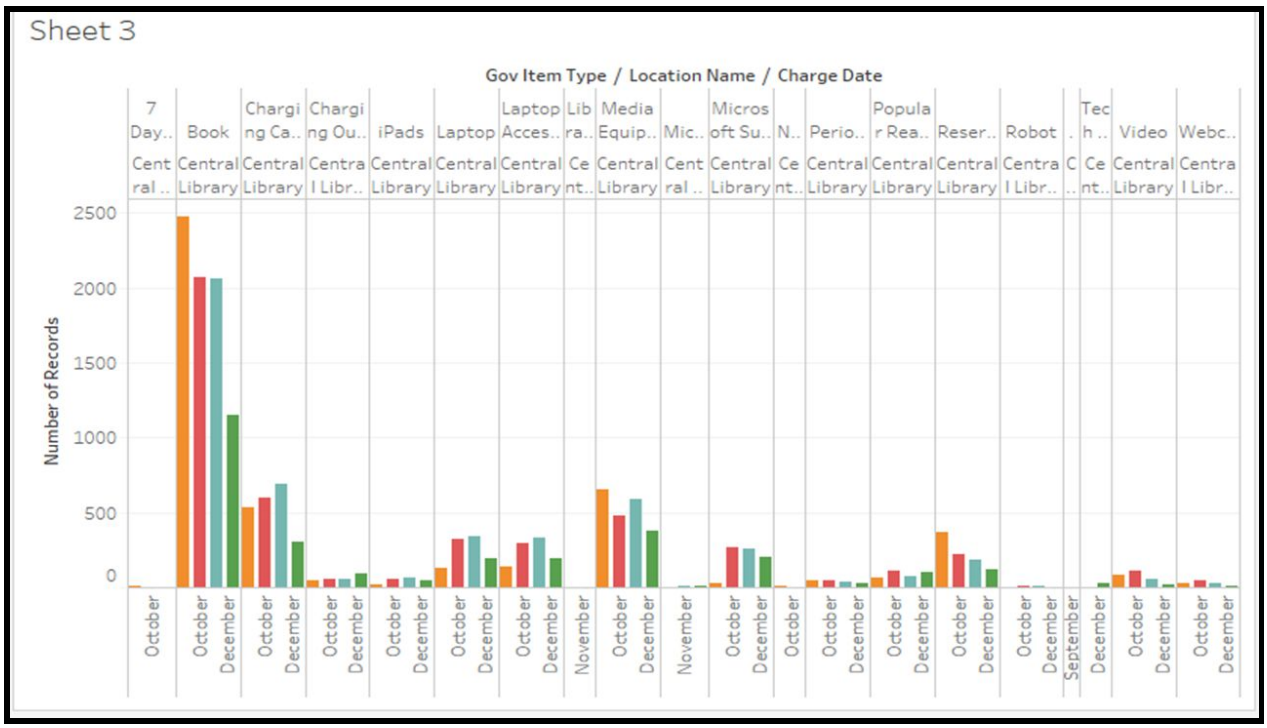
The Location Name filter will appear on the right:
Central Library will be checked.



Drag Gov Item Type in the Columns field: *This gives us the items related to our question.*



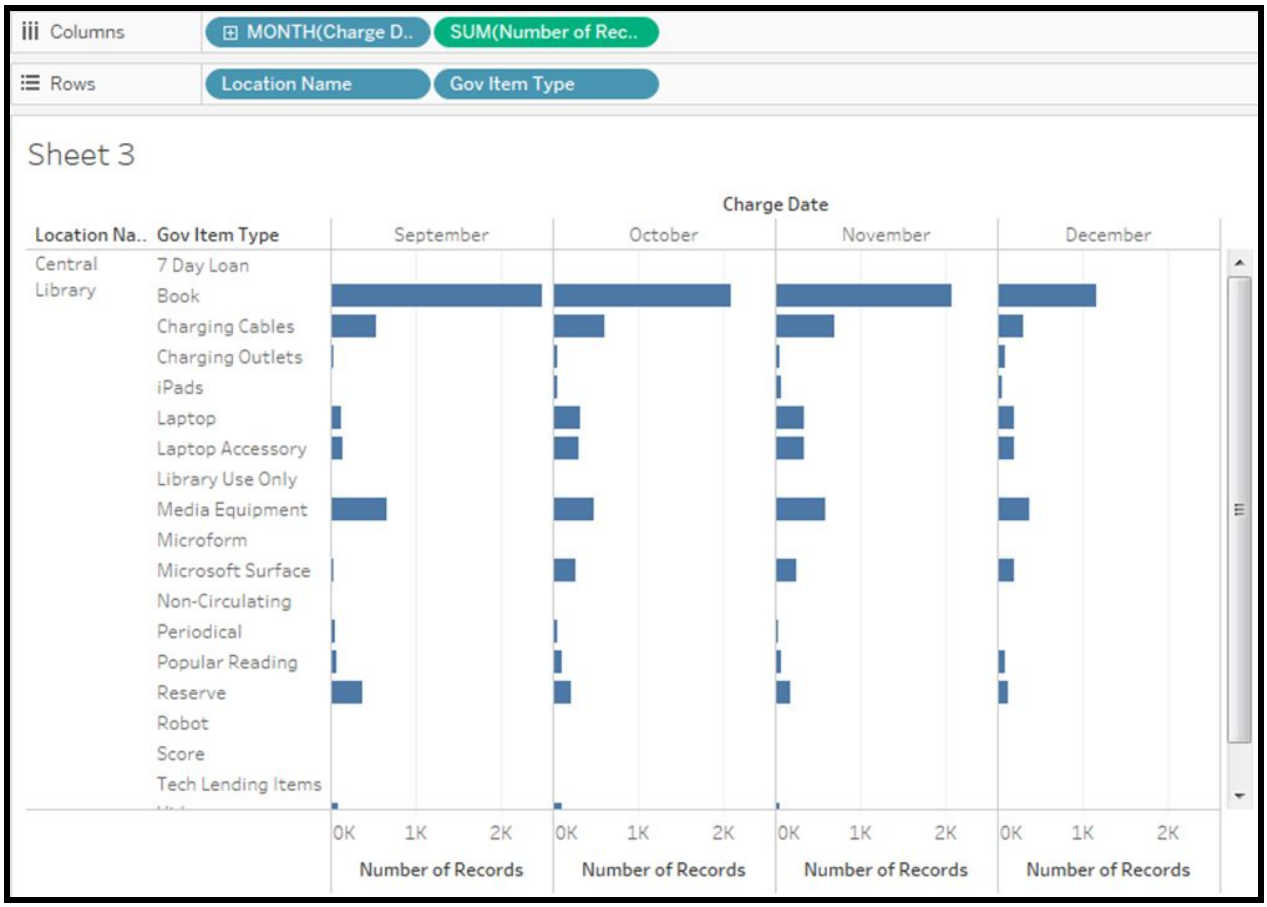
Your viz should look something like this:



This viz could look better.

5of5 In the Show Me menu, choose Horizontal Bars:

We can understand the data better with this viz:



Important: When you choose different vizzes, the Columns and Rows fields' information changes. There is a scroll panel on the right; more items are below.

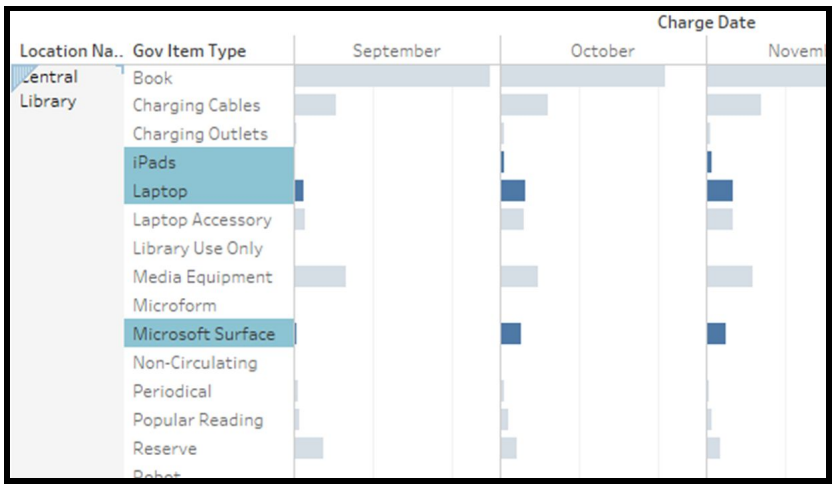
ANSWER: Books has circulated the most at Central Library followed by Charging Cables and Media Equipment.

Try other vizzes using Show Me.

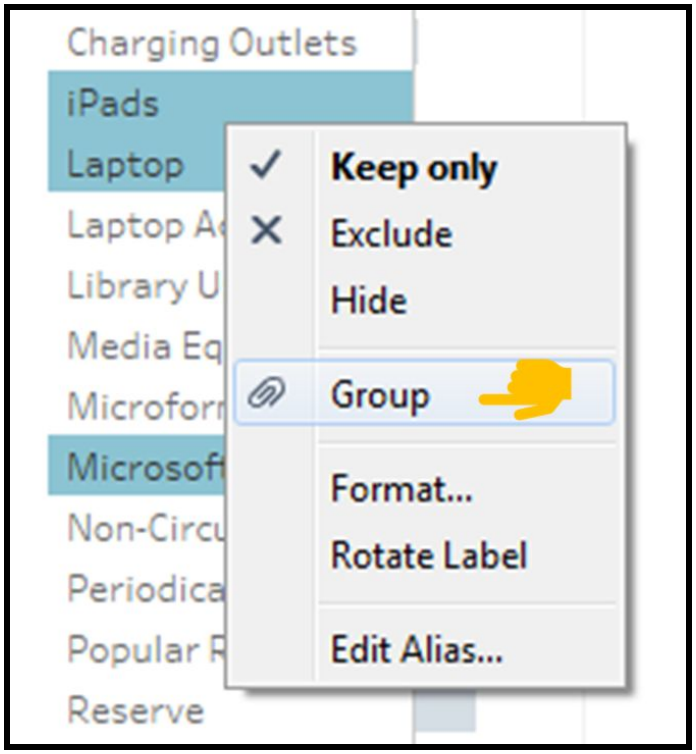
SAVE your info.

Let's group items by category.
We will group tablet type items on the sheet by choosing the ipad, Microsoft Surface, and laptop.

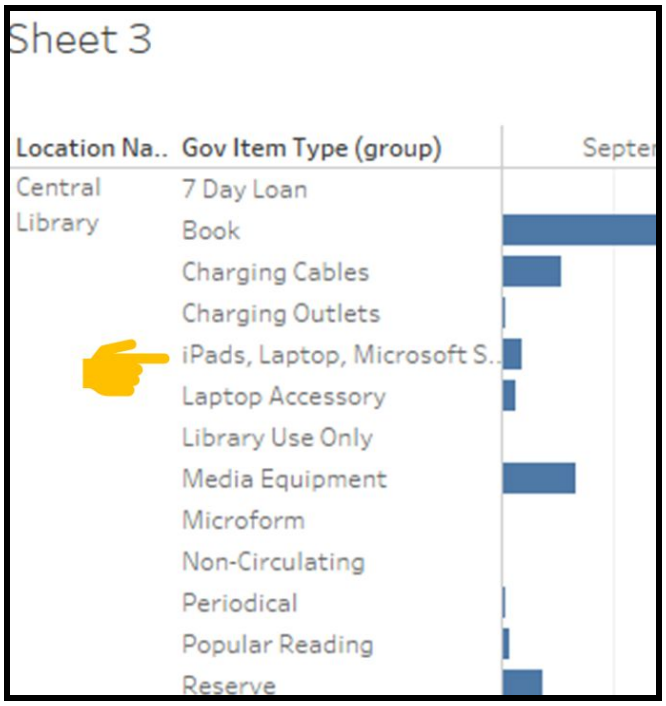
1of5 Ctrl and left click on the three "tablet type items" from above:



2of5 Right click in any of the highlighted areas. A pop up box will appear. Choose Group:

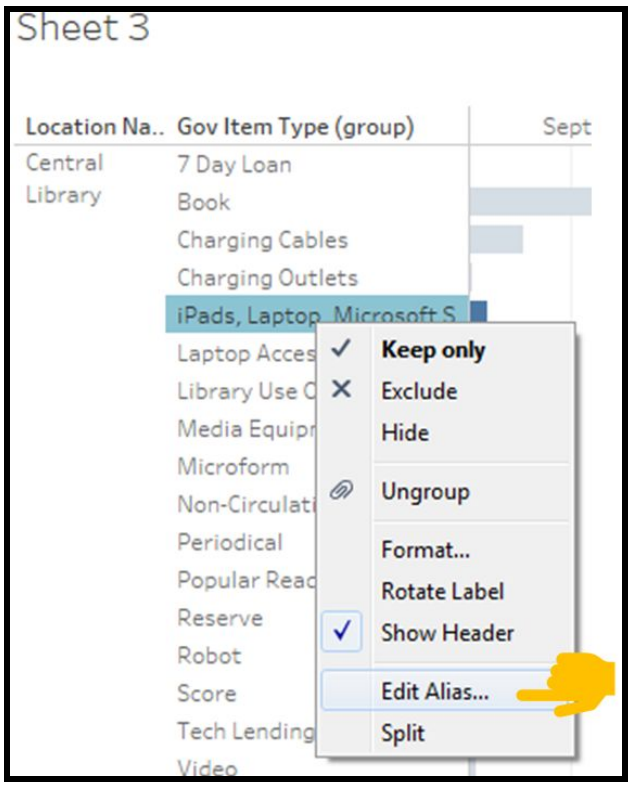


3of5 The three items will be on one line:

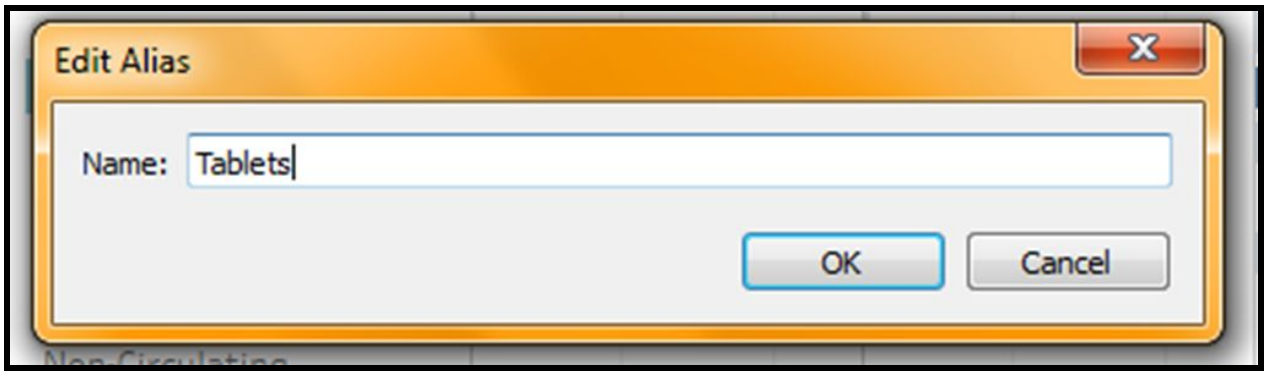


Rename this group to Tablets.

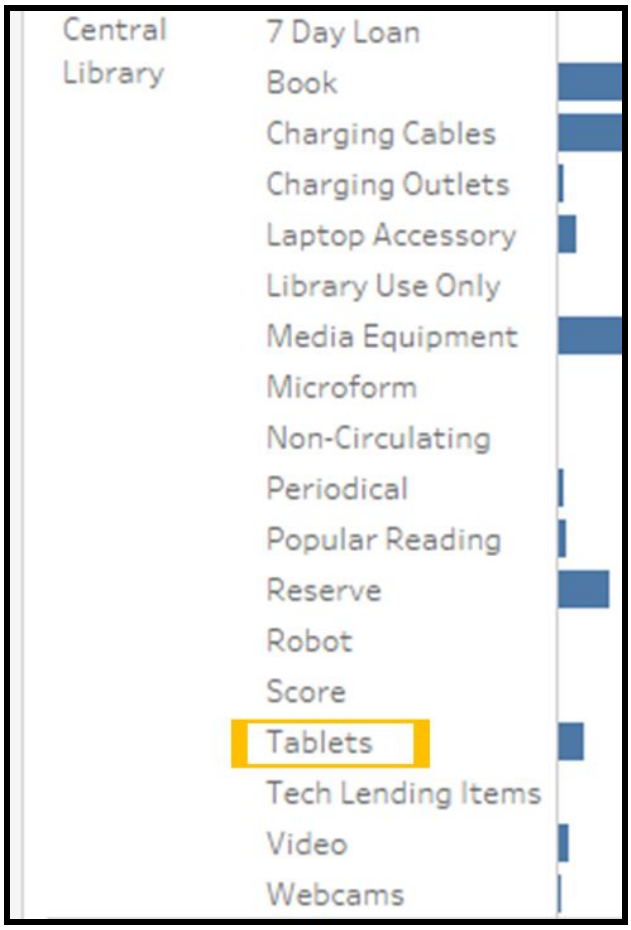
4of5 Right click the group and choose Edit Alias:



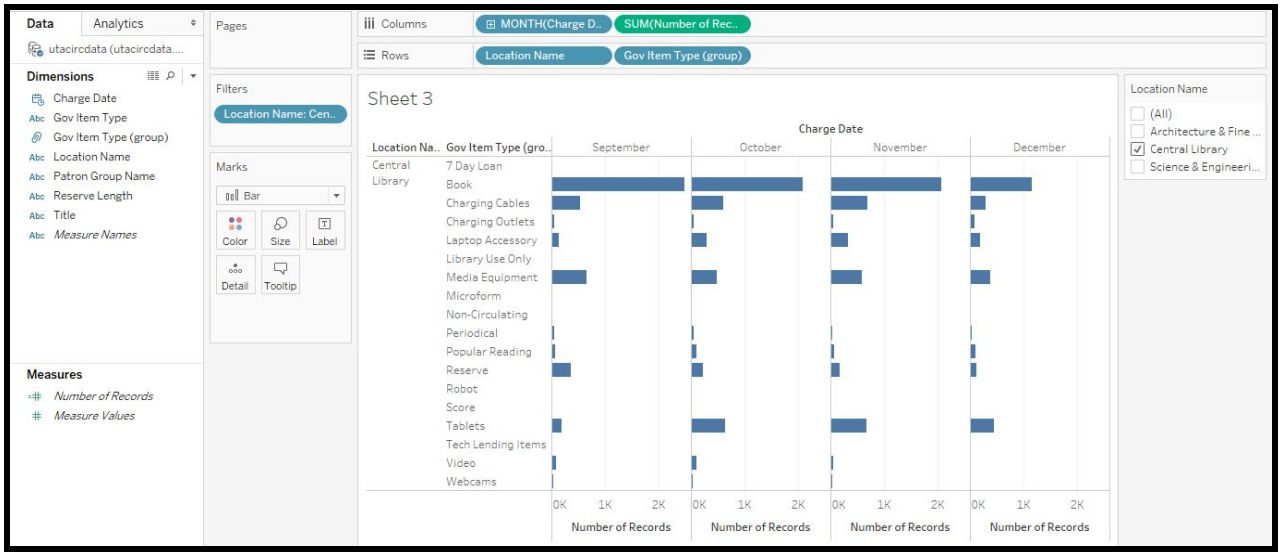
5of5 A pop up window will appear. Change the name to Tablets and click OK:



The new name will appear in the list, alphabetized:



The final viz looks like this:

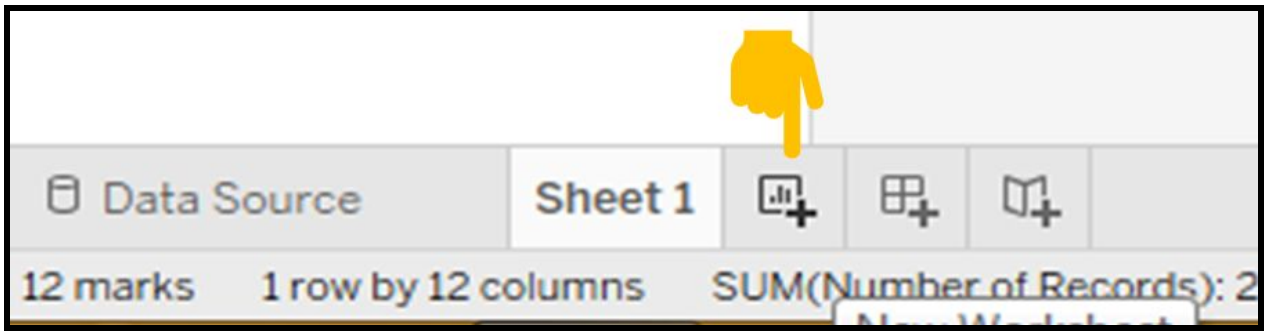


SAVE your info.

Filtering Data and Building a Side-by-Side Bar Graph in Tableau

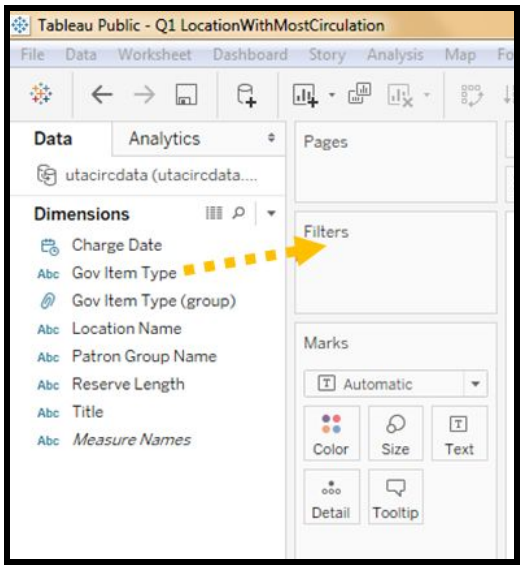
QUESTION: Which library circulates the most Reserve Items?

1of8 Start with a new sheet:

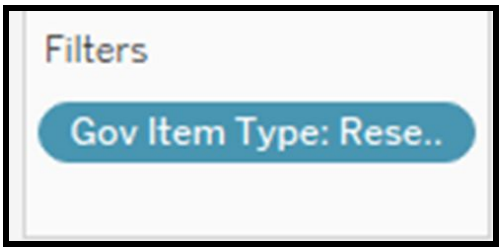


We will use the Filter field for this.
It's best to use Filter first, because there are so many items in Gov Item Type, and the Filter is only good with 20 choices.

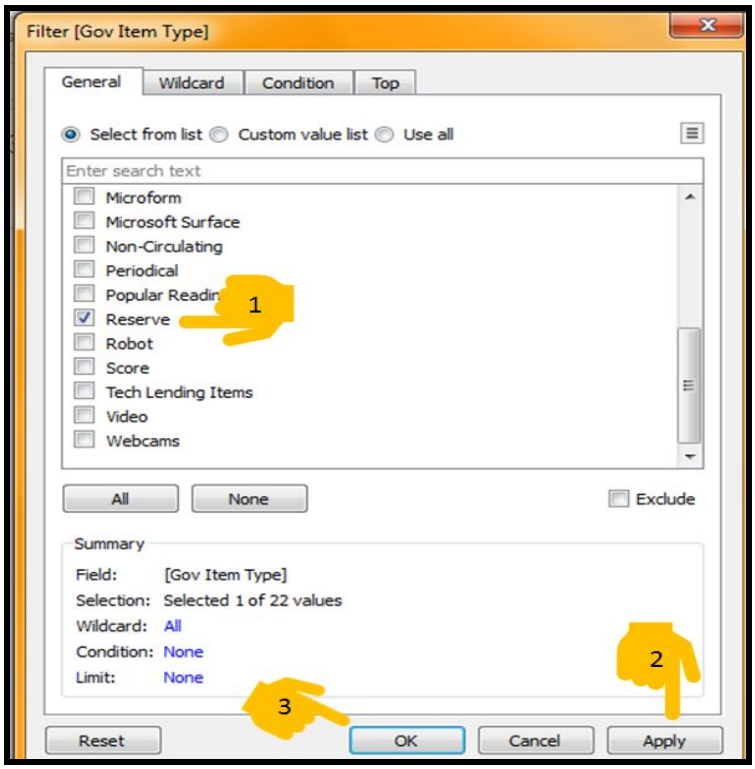
2of8 From the Dimensions field, drag Item Type to the Filters field:
The toolbox will appear:



You will see Gov Item Type: Reserve in the Filters field:

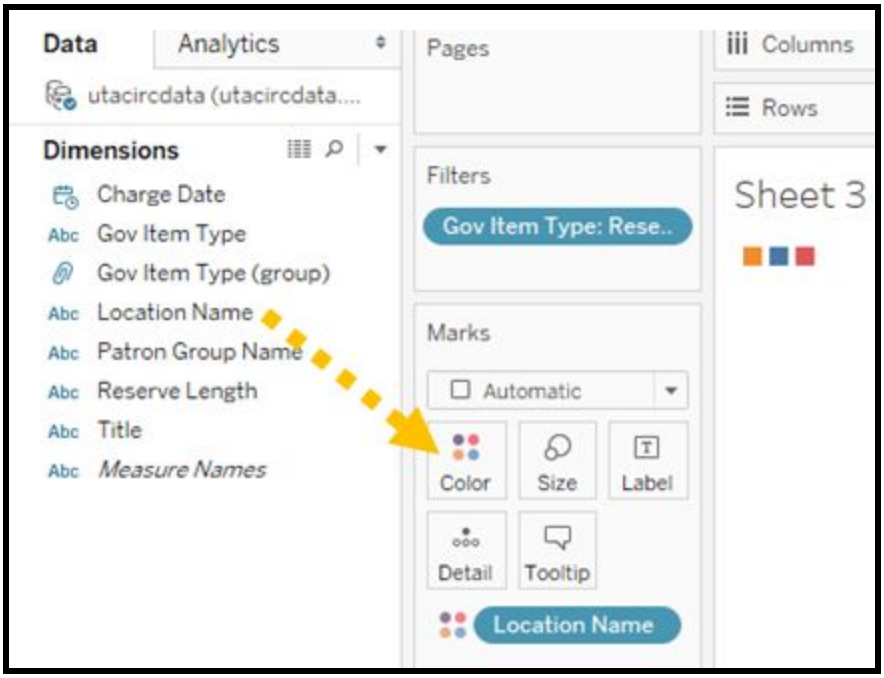


3of8 Scroll and click Reserve. Click Apply, then OK:

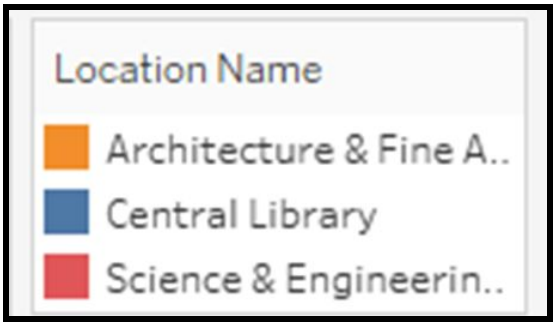


We will visualize Location Name by color since there are only 3 attributes.

4of8 From the Dimensions field, drag Location Name onto Color in the Marks field:

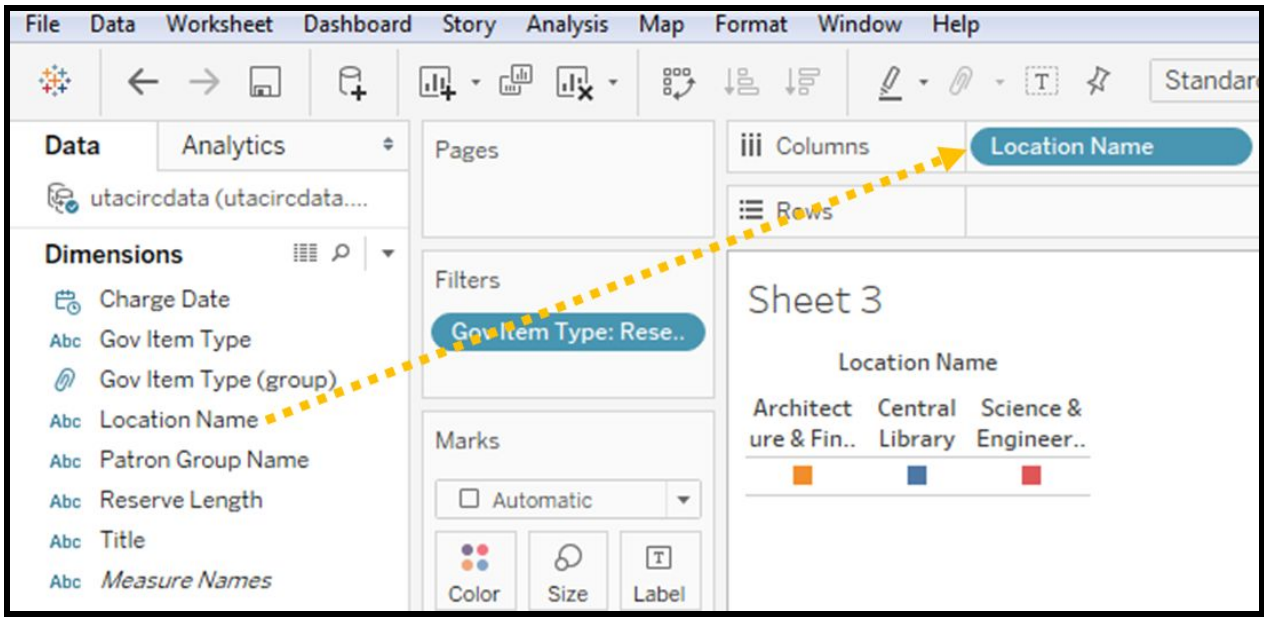


On the far right, you will see the Location Name legend with the three locations colored:



Let's make a viz of the three libraries in the sheet.

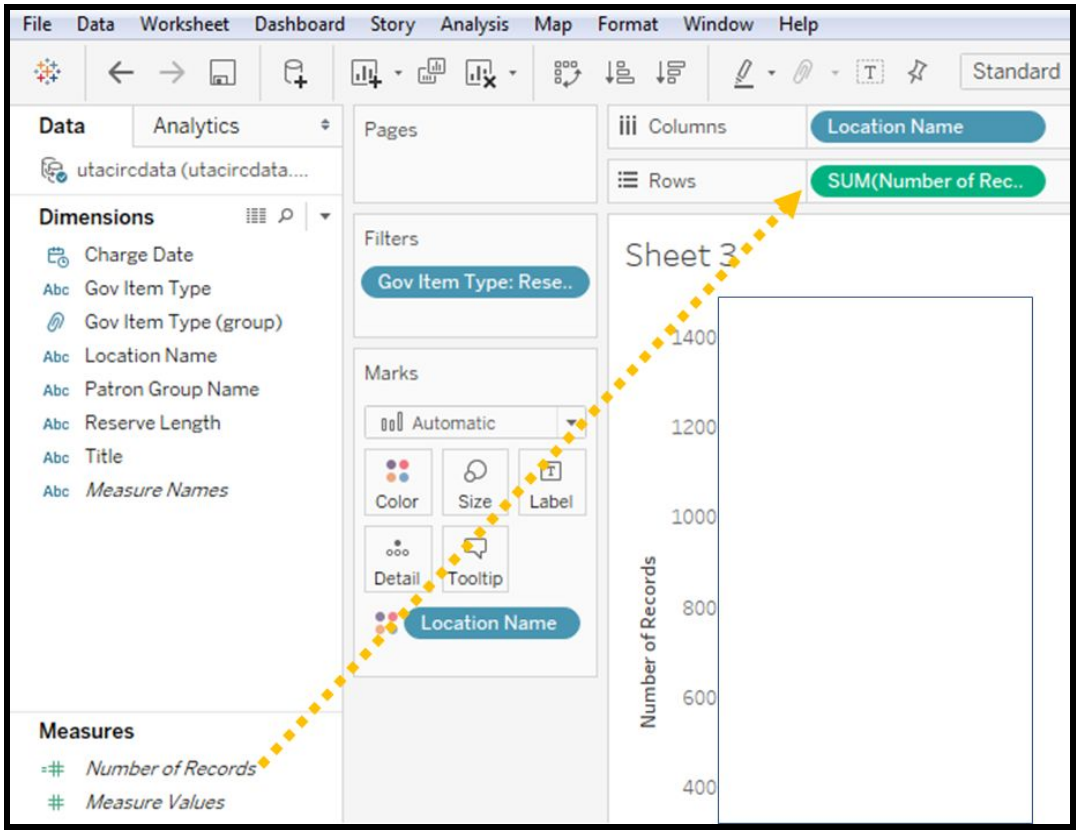
5of8 From the Dimensions field, drag Location Name to the Columns field:



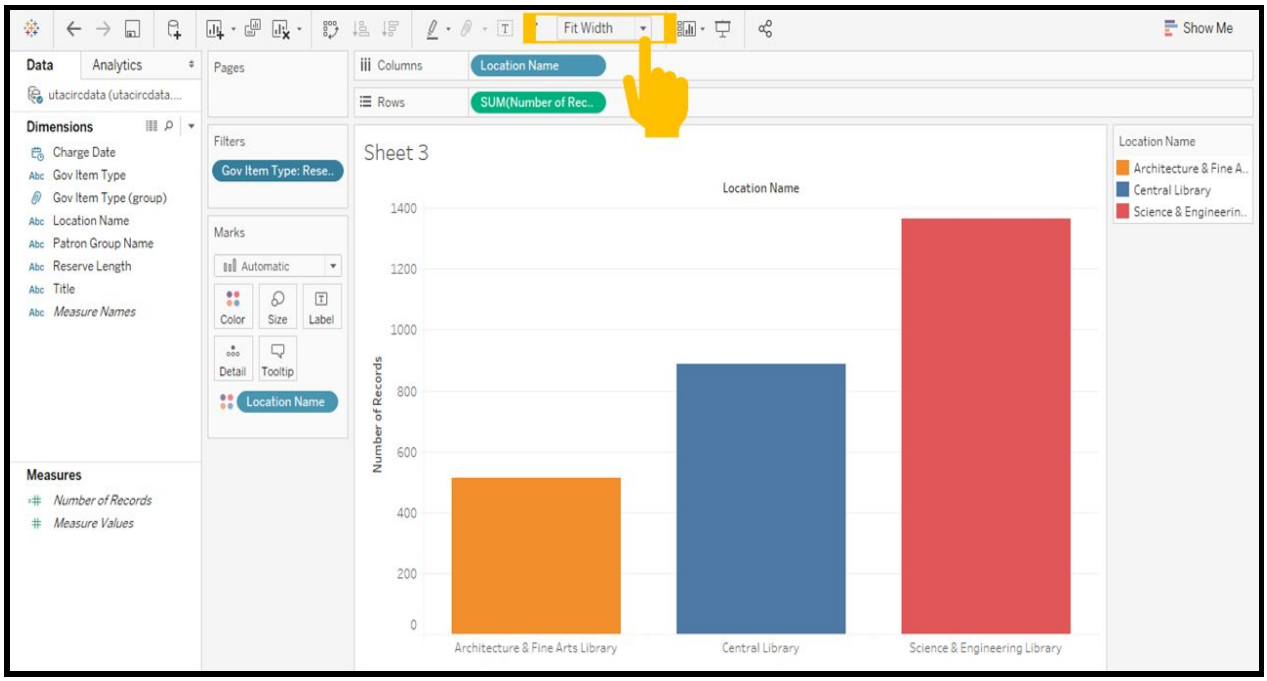
You will see Location Name populate the sheet.

We need to compare the Number of Records by Location Name.

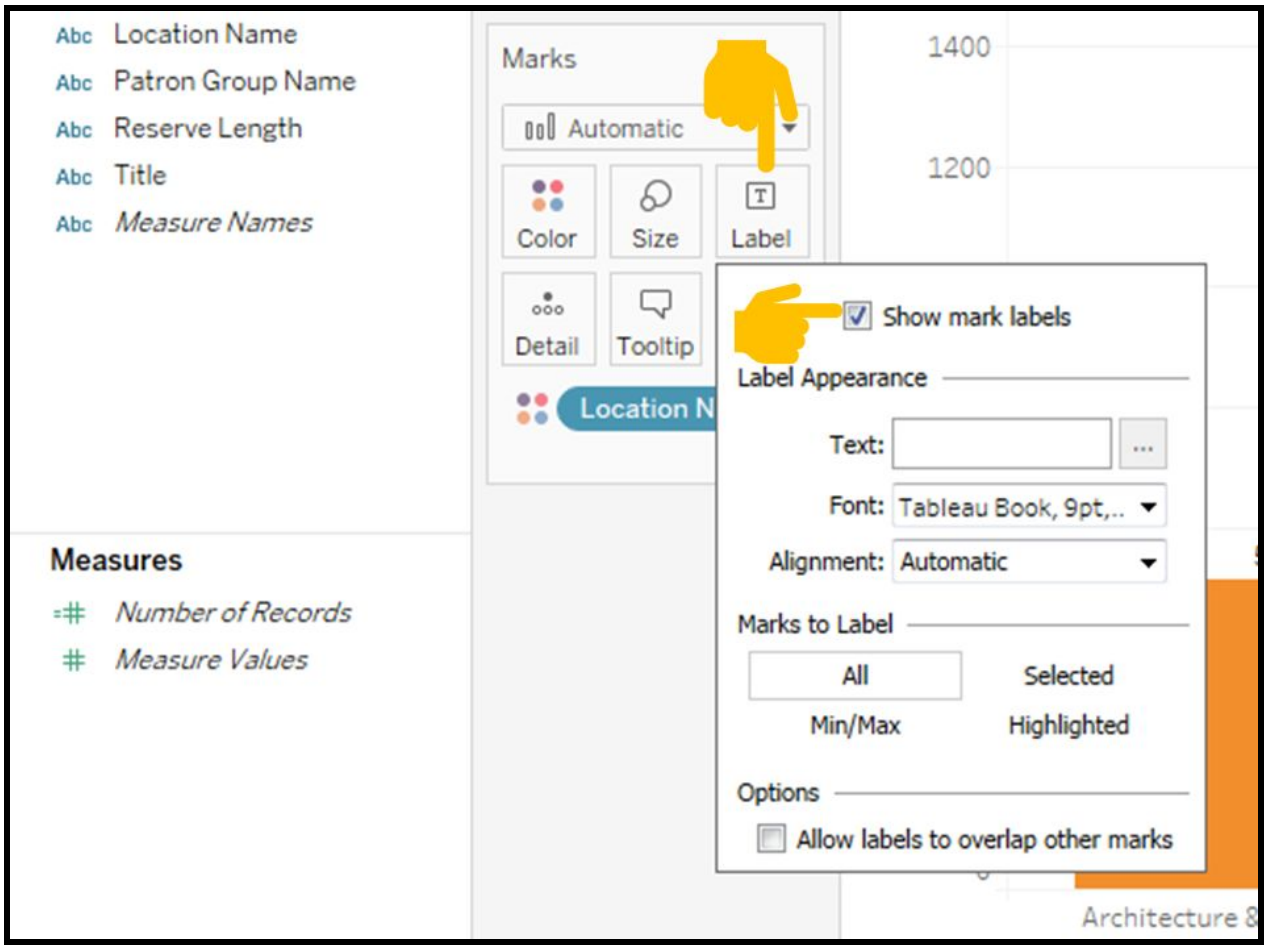
6of8 From Measures, drag Number of Records to the Rows field:



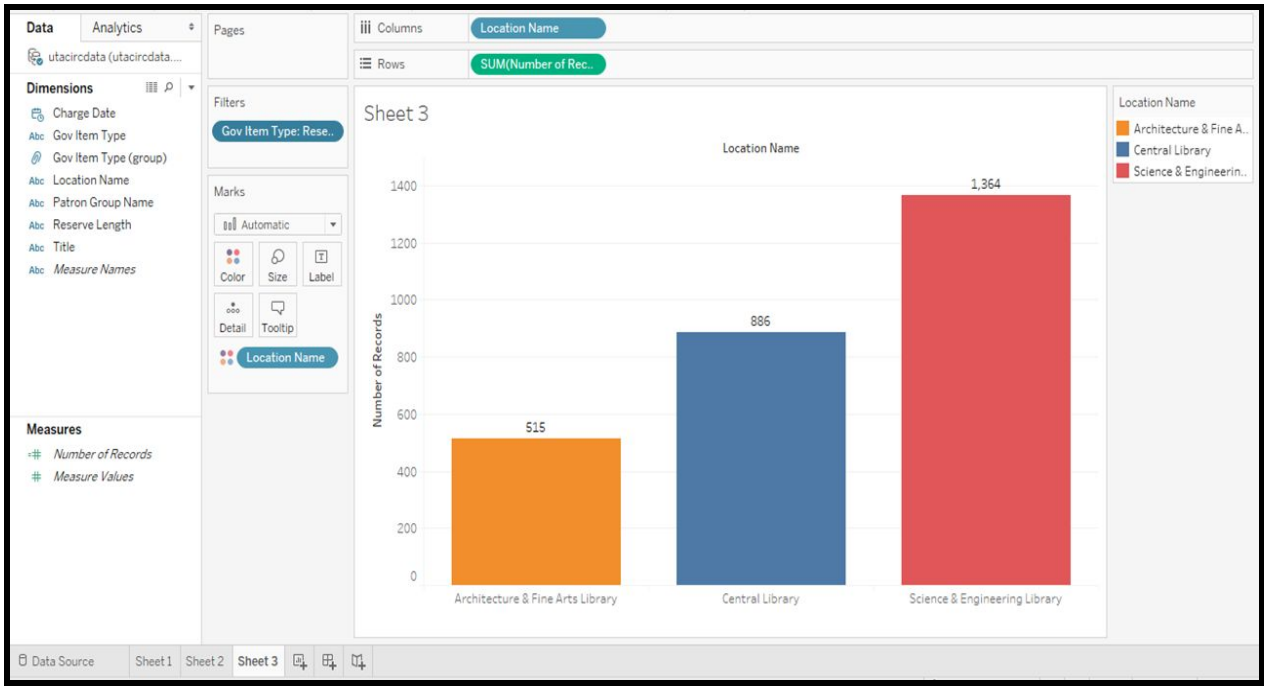
7of8 The sheet will populate with the viz. (from the dropdown menu at the top of the page, change “Standard” to “Fit Width”:



8of8 To see the graph amounts, click Label in the Marks field, then check the box next to “Show Mark Labels”:

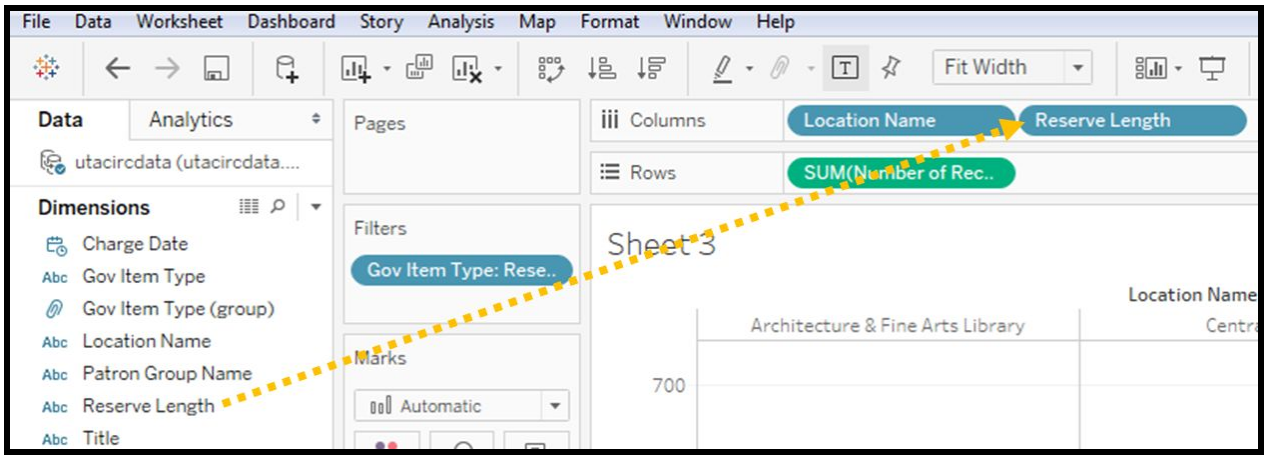


The viz should look like this:



Look at the different types of Reserve.

Drag Reserve Length in Columns:



The Reserve Length will appear.

Final Viz:

Try out the different ways to visualize the data in the “Show Me” tab at the top right.

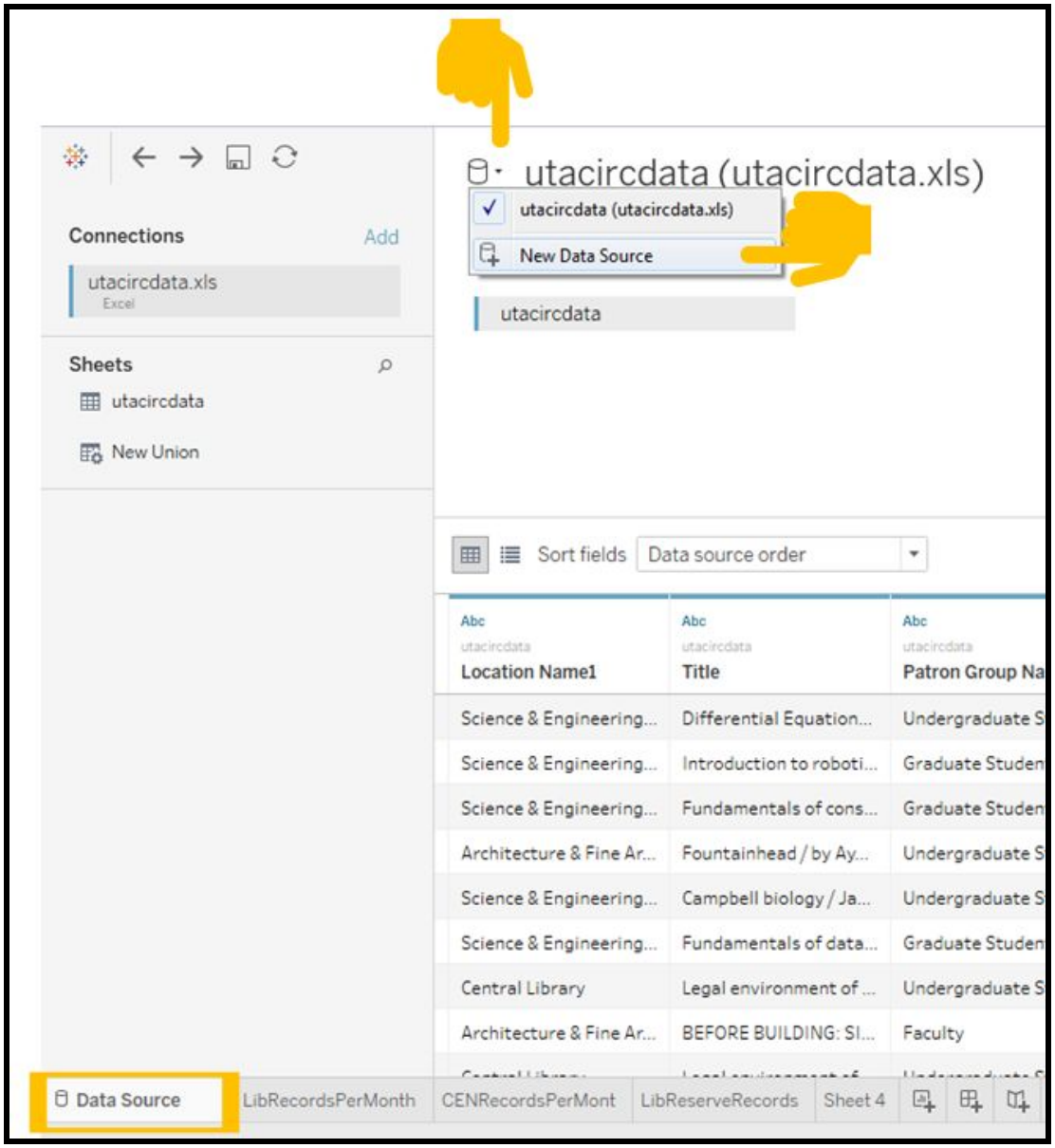
CHALLENGE QUESTION: What are the different lengths of reserve items being circulated per Location?

SAVE your info.

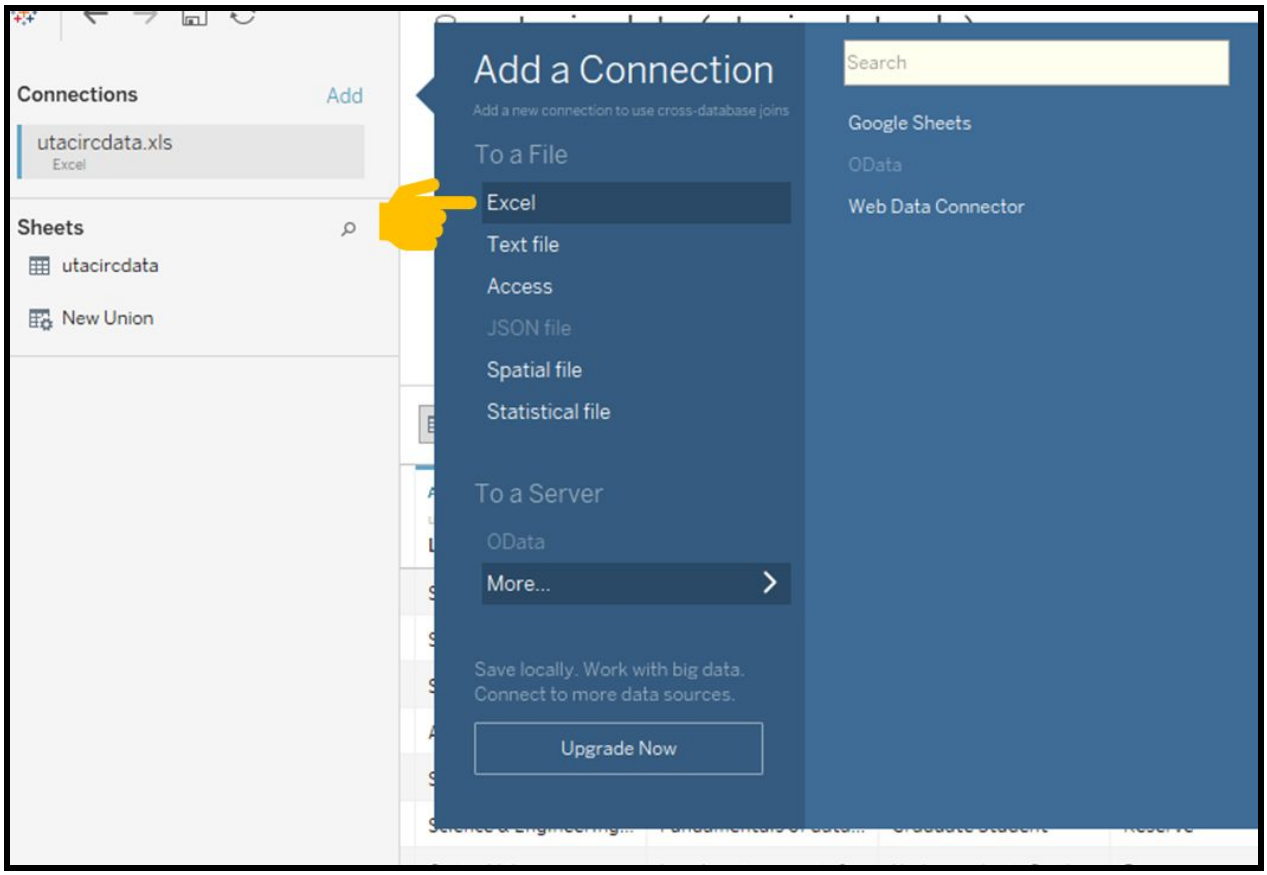
Building a Packed Bubbles Viz in Tableau: Libland Viz

We will pull the Libland data onto the Data Source page we already have open in Tableau.

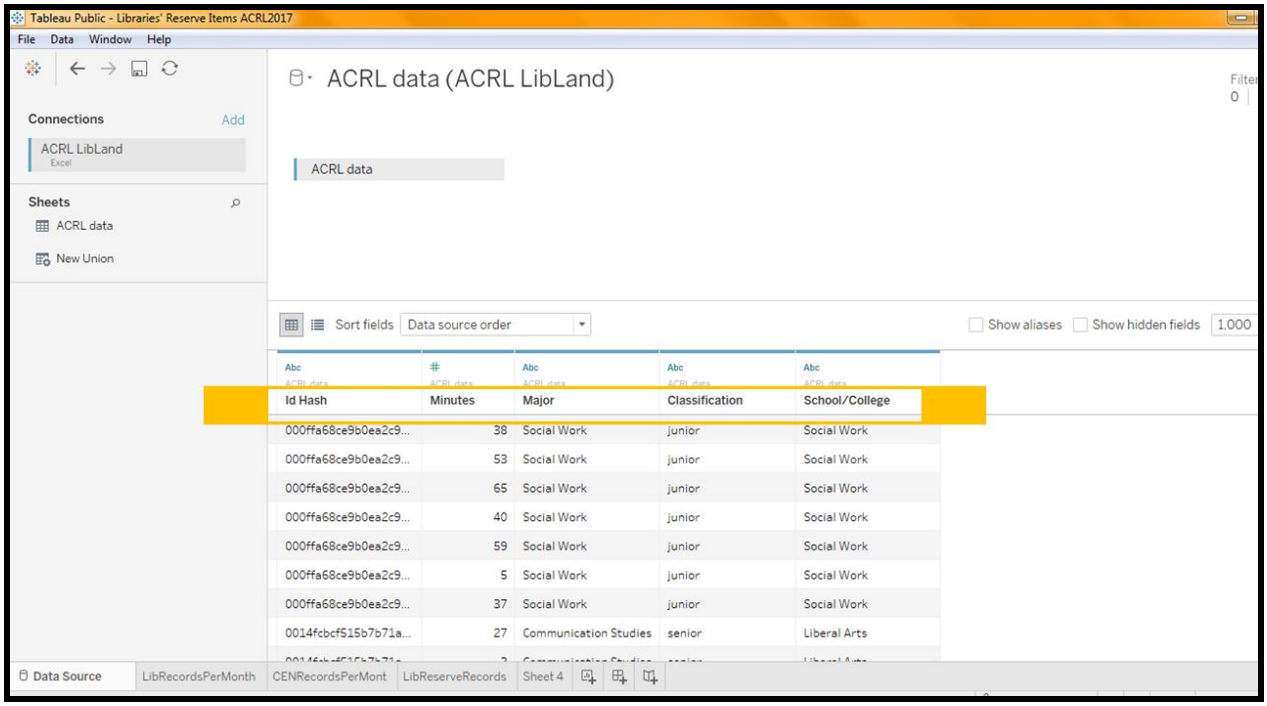
1of5 Click the bucket in front of utacircdata and click New Data Source:



2of5 In the pop-up window click Excel and choose the ACRL LibLand:



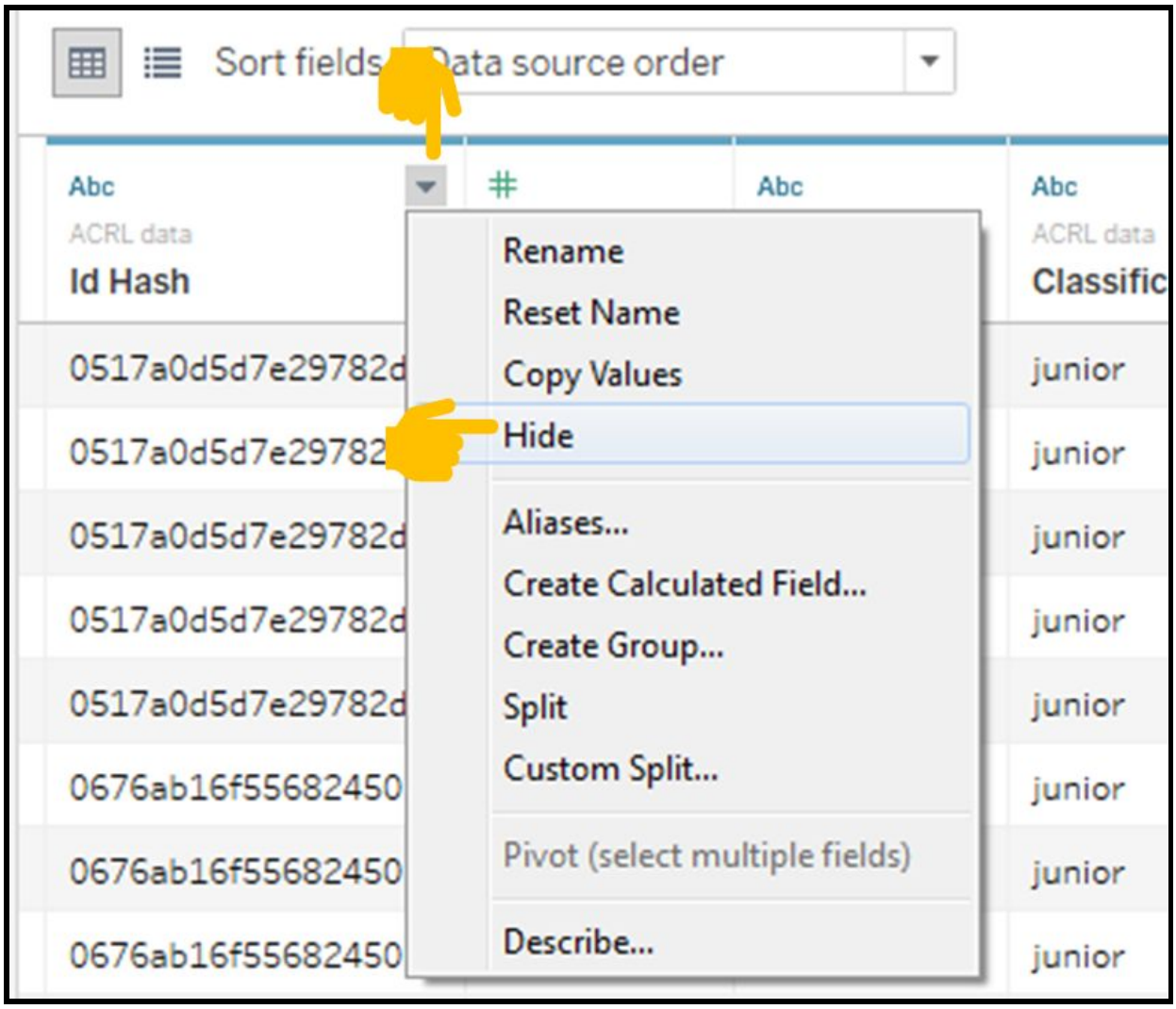
3of5 Tableau Data Source page will look like this:



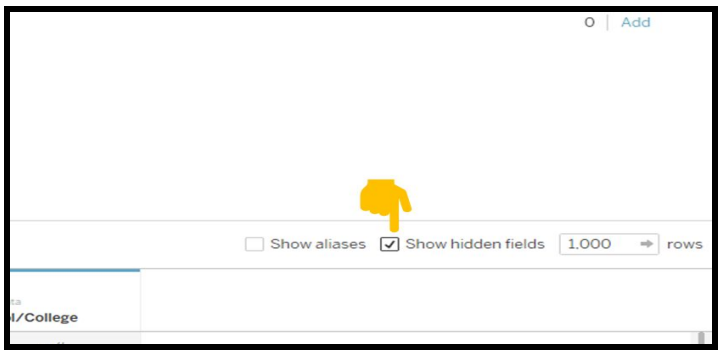
The ACRL LibLand data is now listed under Connections. The fields have changed to the LibLand data set.

We don't need the Id Hash. Hide it.

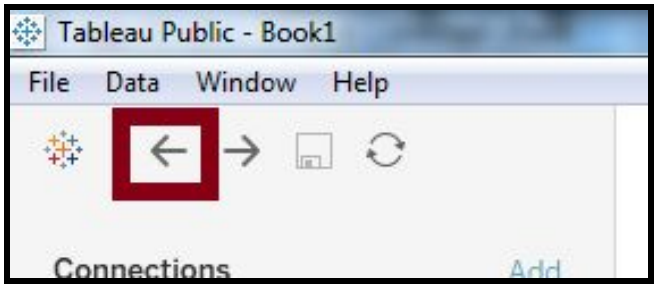
4of5 Scroll over the Id Hash arrow and an arrow will appear. Click the arrow and choose Hide from the dropdown menu:



Unhide by clicking Show Hidden Fields:

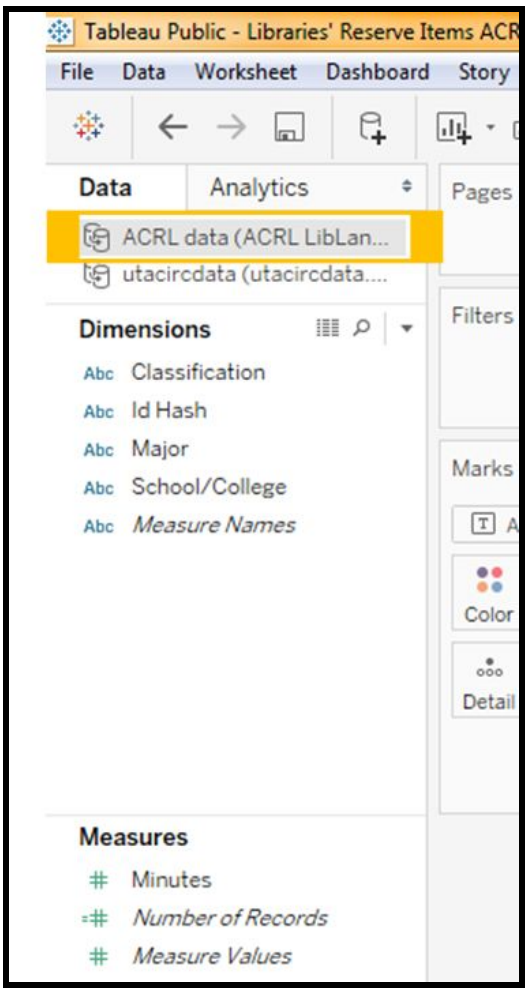


Or, click the back arrow at the top left: *(this is to be used when you want to unhide right after hiding or to UNDO any step(s)).*



Warning: Hiding the data, created Null in some of the other fields (troubleshoot)

5of5 Click on a New Worksheet and you will see the LibLand data appear, highlighted the Data field and its data in the Dimensions and Measures fields:

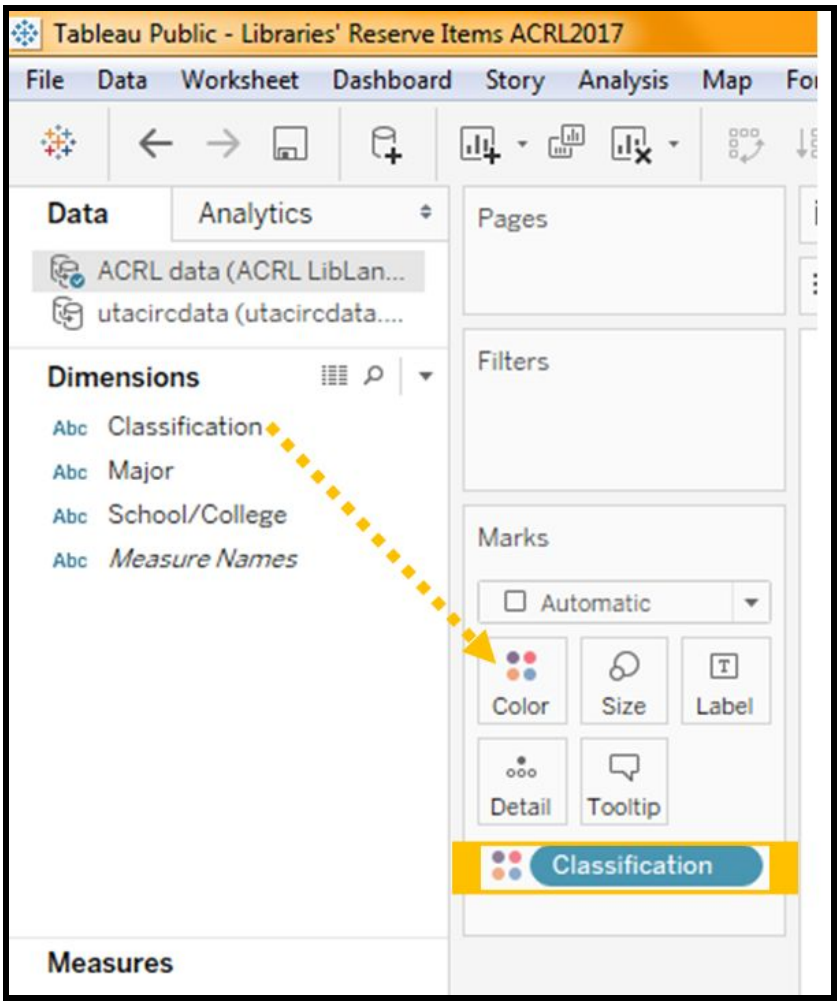


SAVE your info.

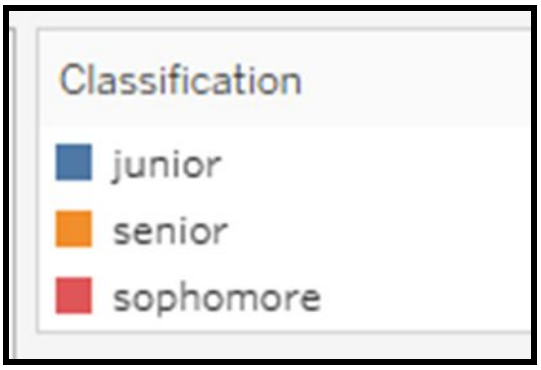
QUESTION: How much time are the different classifications of students (Senior, Junior, Sophomore) staying in the library?

We only have three different classifications, so using the Packed Bubbles is one way to viz the data.

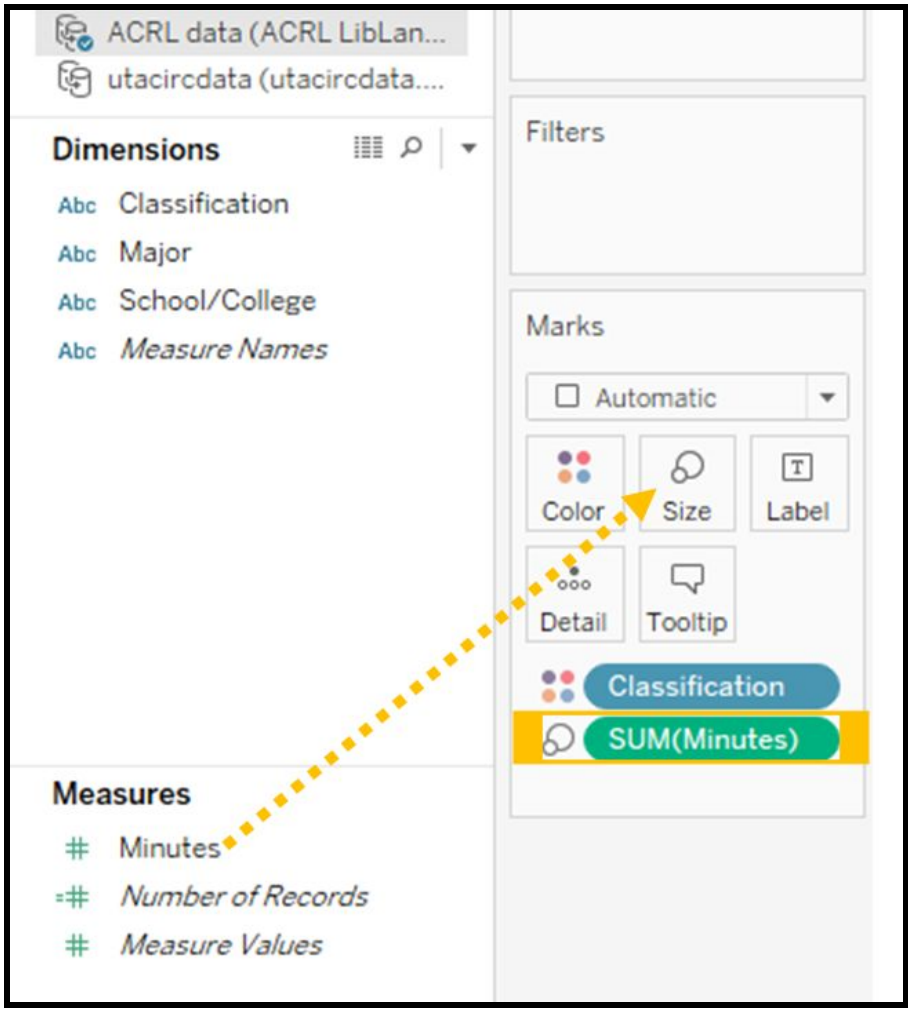
1of3 From the Dimensions field, drag Classification onto the Color in the Marks field:



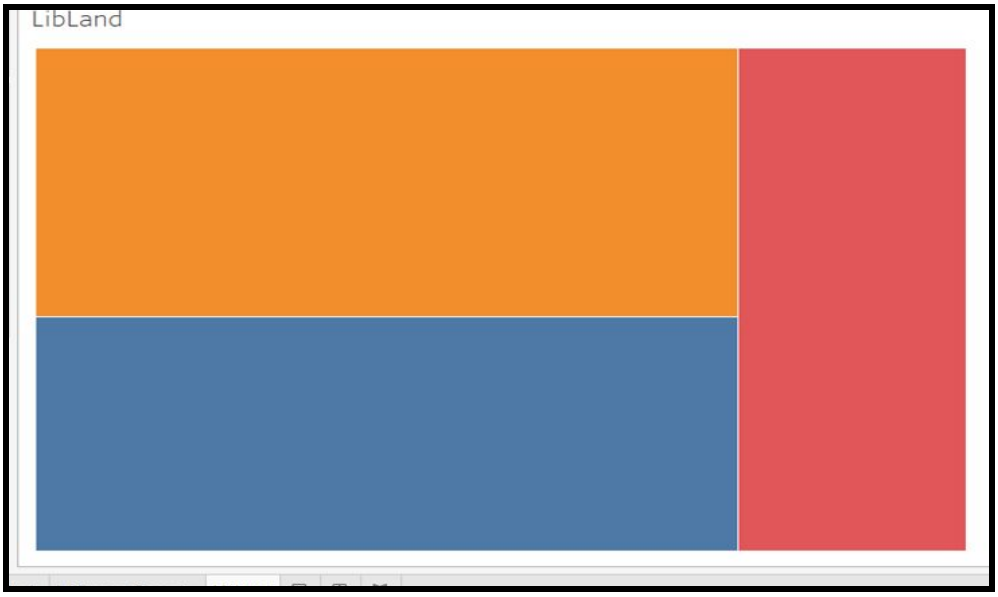
You will see the three Classifications in the legend:



2of3 From the Measures field, drag Minutes onto Size in the Marks area and it will appear in the Marks Field:

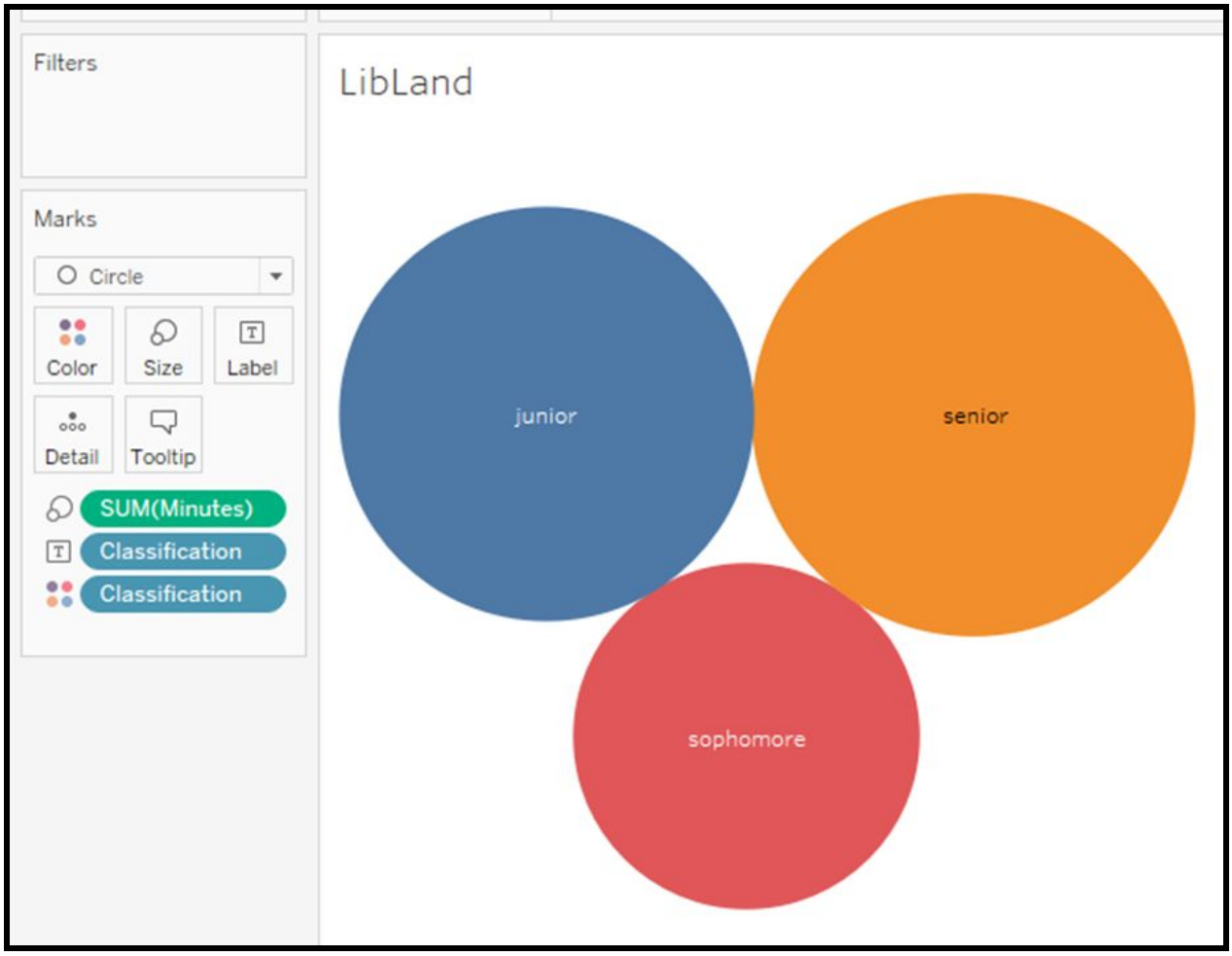


Your screen should look like this:



3of3 Click the Show Me menu in the top right and choose Packed Bubbles.

Your final viz should look like this:



When you scroll over the Packed Bubbles, information about the minutes will result. Notice how Classification appeared in the Marks field for Label (the bubbles are labeled).

ANSWER: Seniors Juniors, and Sophomores respectively, spend the most time in the library.

Explore other vizzes in the Show Me tab for what works best for you.

SAVE your info.

https://public.tableau.com/profile/lenimatthews#!/