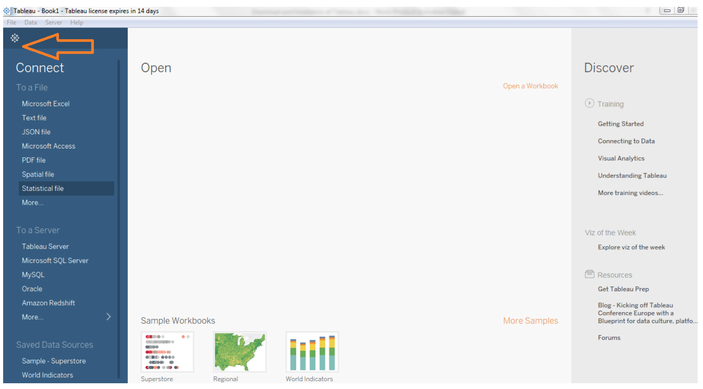
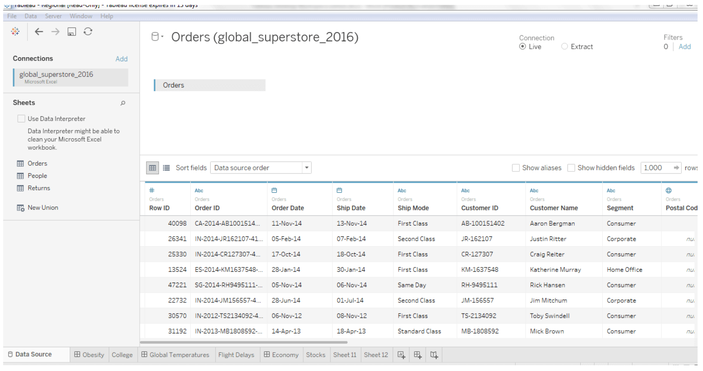
Tableau Desktop Workspace

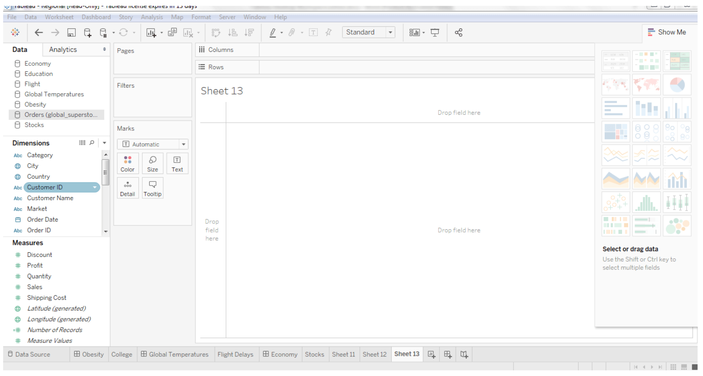
Click on the Tableau icon displayed in the left-hand side of the Tableau worksheet page and expose the contents of the worksheet tab selected at the bottom of the screen. When you connect with a new data source, this is the default workspace view.



Go to the home page and select the global superstore sales-Excel sheet.



Open a connection to a saved data source, you also should have an open blank worksheet.

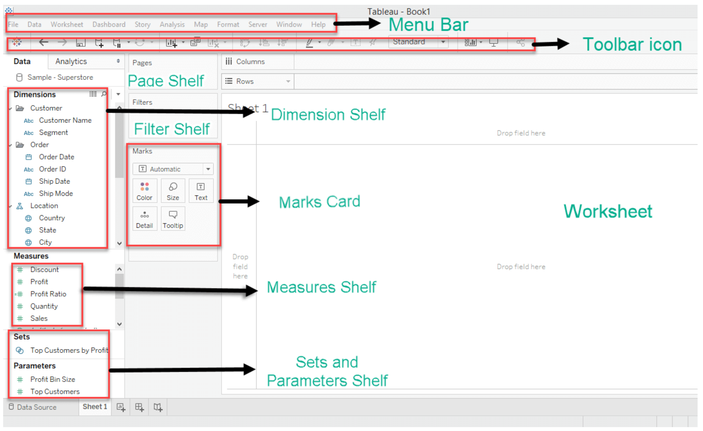


In many ways, you can open a workspace page; for example, go to the display Tableau's icon on your desktop and you have a data source shown on your desktop. Dragging any data source icon and dropping it on the Tableau icon opens Tableau's worksheet page for the selected data source. Also, you can open as many connections as you need in Tableau by going to the data connection page or start page and select a new connection.

Now, the worksheet is connected to the global Superstore Sales-Excel dataset.

Tableau Desktop Workspace Menu

The Tableau desktop workspace consists of various elements as given below:



Menu Bar: It consists of menu options like **File, Data, Worksheet, Dashboard, Story, Analysis, Map, Format, Server, Window,** and **Help**. The options in the menu bar, including features like data source connection, file saving, design, table calculation options, and file export features for creating a dashboard, worksheet, and storyboard.

- **File Menu:** For any Windows program the file menu contains New, Open, Close, Save, Save As, and Print, functions. The most frequently used feature found in this menu is the Print to pdf option. This allows us to export our dashboard or worksheet in pdf form. If you don't remember where Tableau places files, or you want to change the default file-save location, use the repository location option for review the file and change it. We can create a packaged workbook from the export packaged workbook option in a fast manner.
- **Data Menu:** You can use a data menu if you find some interesting tabular data on a website that you want to analyze with Tableau. Highlight and copy the data from the site, then use the Paste Data option to input it into Tableau. Once pasted, then Tableau will copy the data from the Windows clipboard and add a data source in the data window. The Edit Relationships menu option is used in data blending. This menu option is needed if the field names are not identical in two different data sources. It allows you to define the related fields correctly.
- **Worksheet Menu:** The Export option allows you to export the worksheet as an Excel crosstab, an image, or in Access database file format. The Duplicate as Crosstab option creates a crosstab version of the worksheet and places it in a new worksheet.
- **Dashboard Menu:** The Action Menu is a useful feature that is reachable from both the Worksheet Menu and the Dashboard Menu.
- **Analysis Menu:** In this menu, you can access the stack marks and aggregate measures options. These switches allow you to adjust default Tableau behaviors that are useful if you required to build non-standard chart types. The Create Edit Calculated Field and Calculated Field options are used to make measures and new dimensions that don't exist in your data source.
- **Map Menu:** The Map Menu bar is used to alter the base map color schemes. The other menu bar are related in the way of replacing Tableau's standard maps with other map sources. You can also import the geocoding for the custom locations using the geocoding menu.
- **Format Menu:** This menu is not used very commonly because pointing at anything, and right-clicking gets you to a context-specific formatting menu more quickly. You may need to alter the cell size in a worksheet rarely. If you don't like the default workbook theme, use the Workbook Theme menu to select one of the other two options.

Toolbar Icon: Toolbar icon below the menu bar can be used to edit the workbook using different features like redo, undo, new data source, save, slideshow, and so on.

Dimension Shelf: The dimension presents in the data source for example- customer (customer name, segment), order (order date, order id, ship date, and ship mode), and location (country, state, and city) these all type of data source can be viewed in the dimension shelf.

Measure Shelf: The measures present in the data source, for example- Discount, Profit, Profit ratio, Quantity, and Sales- These all types of data source can be viewed in the measure shelf.

Sets and Parameters Shelf: The user-defined sets and parameters can view in the sets and parameters. It is also used to edit the existing sets and parameters.

Page Shelf: Page shelf is used to view the visualization in video format by keeping the related filter on the page shelf.

Filter Shelf: Filter Shelf is used to filter the graphical view by the help of the measures and dimensions.

Masks Cards: Marks card is used to design the visualization. The data components of the visualization like size, color, path, shape, label, and tooltip are used in the visualizations. It can be modified in the marks card.

Worksheet: The worksheet is the space where the actual visualization, design, and functionalities are viewed in the workbook.

Tableau Repository: Tableau repository is used to store all the files related to the Tableau desktop. It includes various folders like Connectors, Bookmarks, Data sources, Logs, Extensions, Map sources, Shapes, Services, Tab Online Sync Client, and Workbooks. My Tableau repository is located in the file path **C:\Users\User\Documents\My Tableau Repository**.