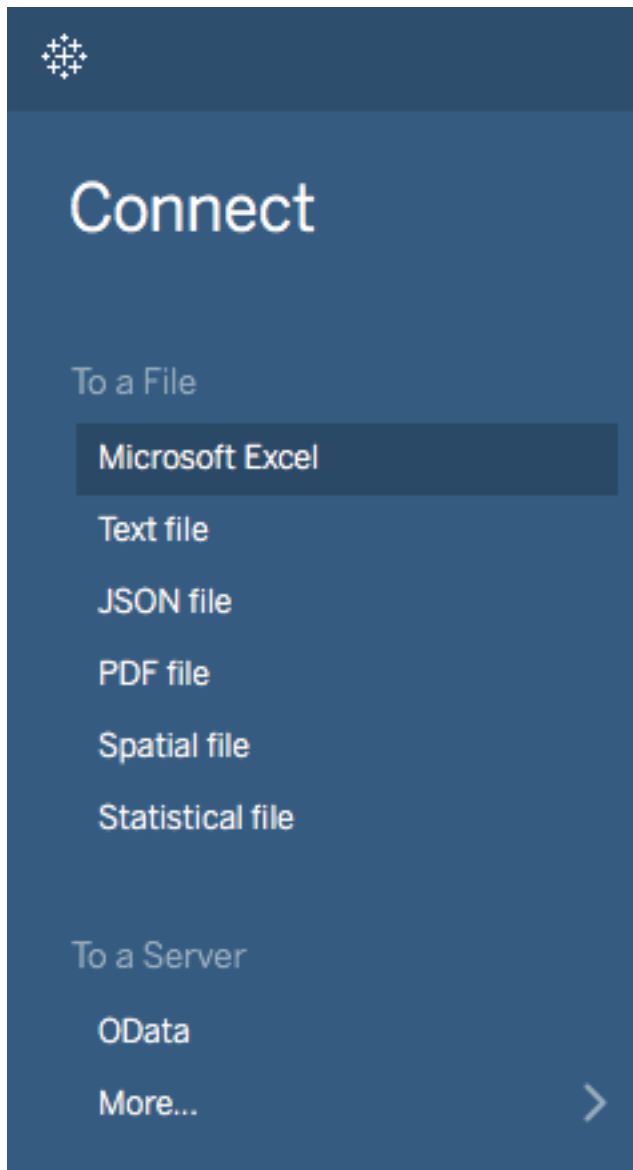


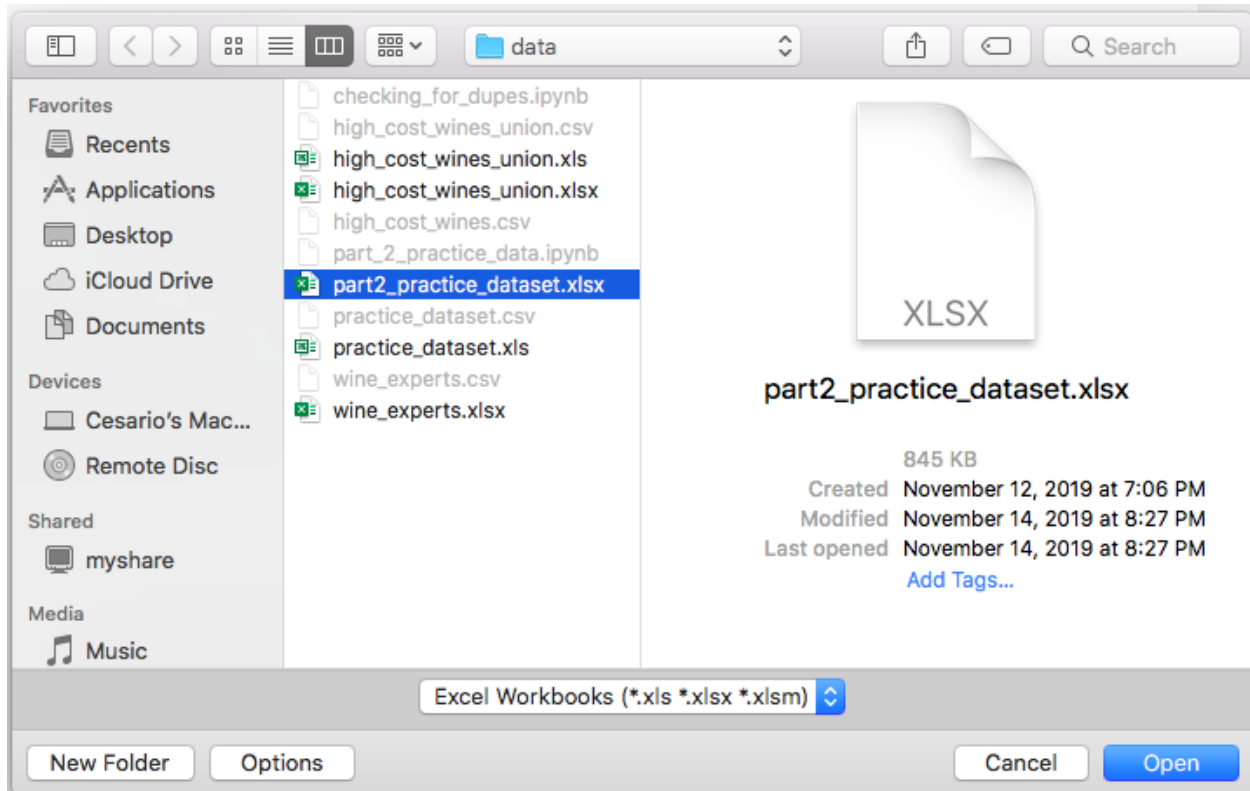
Once you have downloaded the .xlsx files onto your local drive, select the **Microsoft Excel** option in Section 1 of the Connect/Open Page, as shown below.



The Connect Pane: Section 1 of the

Connect/Open Page

In the navigation window that pops up, navigate to where you have stored the .xlsx files and select the file named ***part2\_practice\_dataset.xlsx***, as shown below.

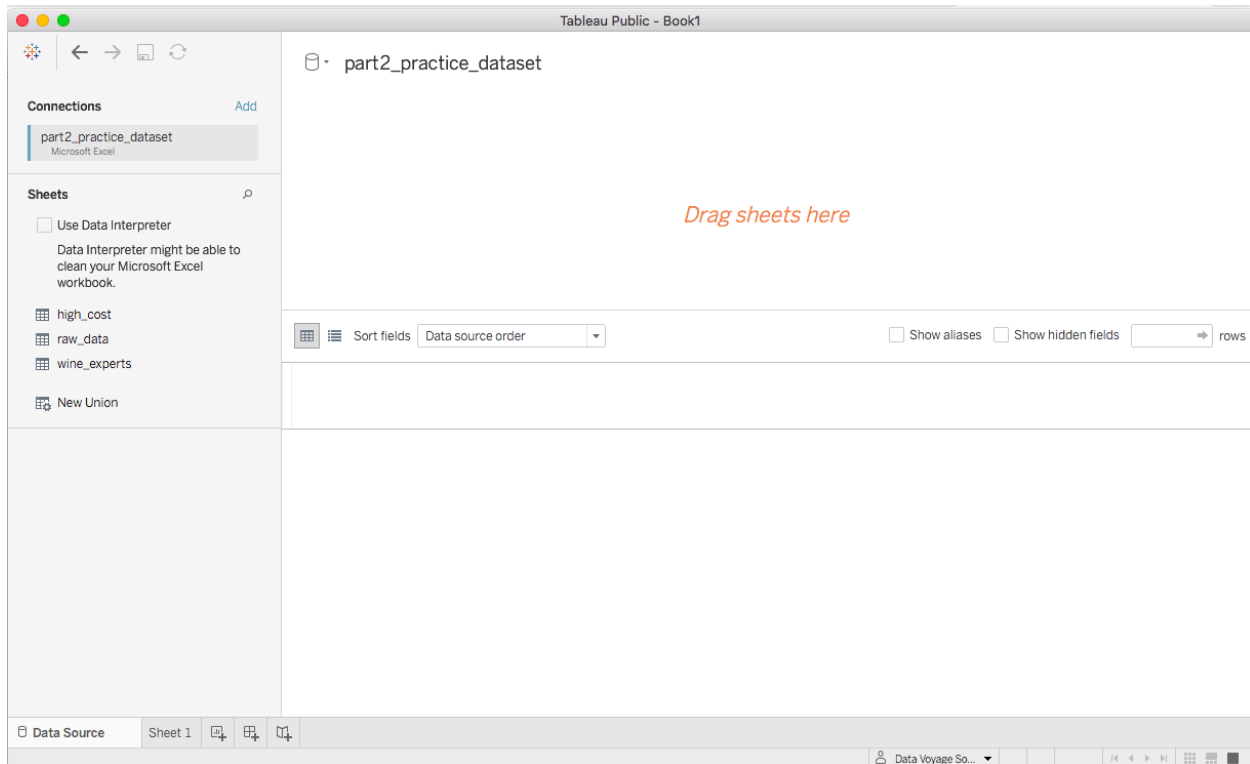


File Directory Window that is prompted when you select an option in Section 1 of the Connect/Open page.

Once you select the file and click **Open**, you'll be taken to the **Data Source** page.

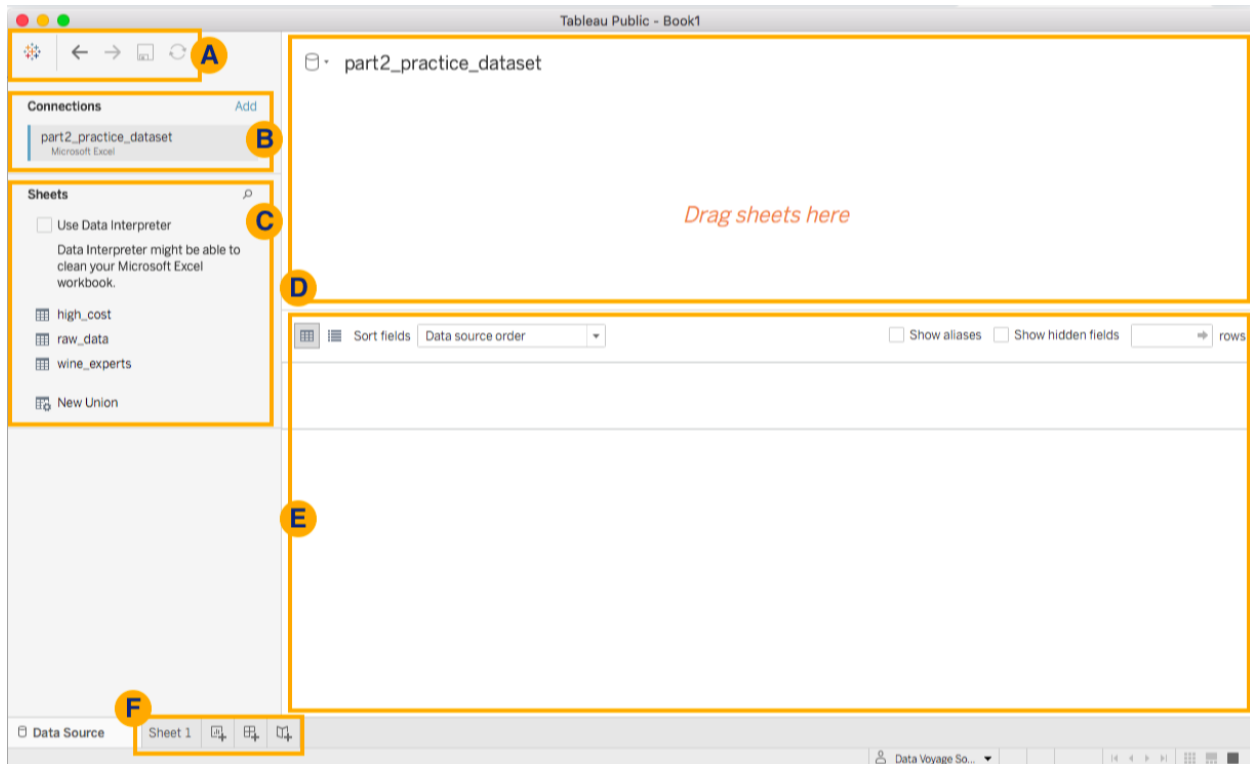
## **Get Familiar With The Data Source Page**

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This is the Data Source page that you will see after you select the data connection (in our case, an Excel file).

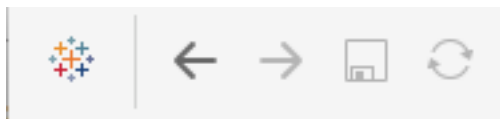
**Please note:** There are a lot of buttons and menus that can be found in the Data Source page. I am only going to review the few that we will need to use in this course.



This is an outline of the sections that make up the Data Source page.

## Section A

Up in the top-left corner of the screen, you should see the menu of icons shown below.



Section A of the Data Source page.

The *first icon* will take you to the previous Connect/Open page. The *left and right arrows* are the Undo and Redo buttons, respectively.

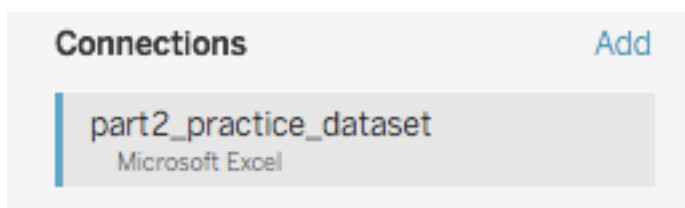
**Pro-tip:** You can also use the usual keyboard shortcut to undo any moves you make.

**PC:** `Ctrl + z`

**MacOs:** `command + z`

The *floppy disk icon* is the **Save** button. You won't be able to save just yet, because we have not made any actual changes. When we do save later on, you can use this button.

## Section B

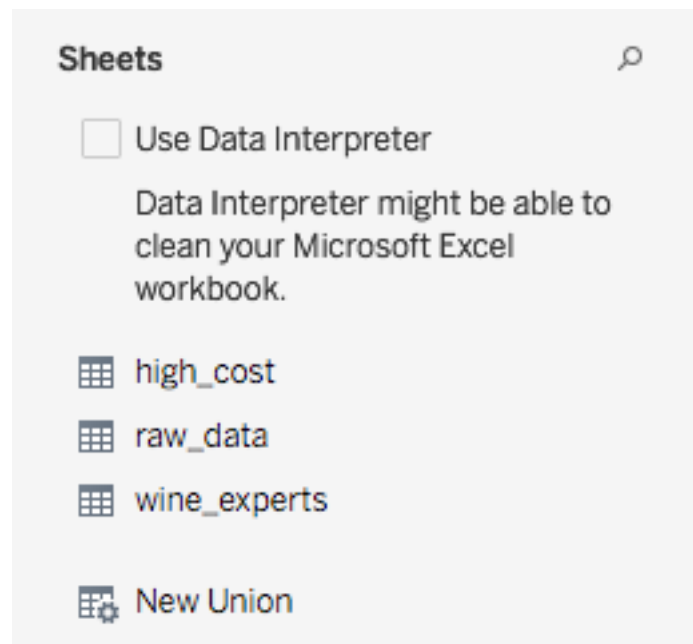


Section B of the Data Source page.

Section B is the *Connections* area in the Data Source page. This area shows you what data sources are connected to the workbook.

Do you see the blue *Add* link? This link allows you to add additional data sources. The workbooks we create in this course will only need one data source connection. So, we will **not** be using this section other than to make sure we are connected to the correct data file.

## Section C



Section C of the Data Source Page.

Let's move on to Section C! In this area, you will see a checkbox to enable *Data Interpreter*, the Excel *Sheets or Files* that you can connect to, and a button icon for *New Union*.

### Use the Data Interpreter Feature

Tableau has a feature called *Data Interpreter*. If you enable this feature (by clicking the checkbox), you allow Tableau to automatically complete some data cleaning tasks for you. You even get a summary file of all the completed tasks.

You will be learning how to complete certain data cleaning tasks yourselves. Therefore, we will **not** be using the Data Interpreter feature in this course. But you should definitely explore it on your own! [Here](#) is a resource if you are interested in learning more!

### Identify the List of Available Dataset Tables

Because you connected to an Excel file, you will see a list of the sheets that exist in that .xlsx file. If the Excel workbook only has one sheet, you will only see one sheet name in this area. Here, you can see that the *part2\_practice\_dataset.xlsx* file contains three sheets: *high\_cost*, *raw\_data*, and *wine\_experts*.

We will be using all three sheets when we combine our data in the next chapter.  
**Use the New Union Button**

The last area of interest in Section C is the option to create a *New Union*.

Having this option in this area streamlines the process of combining datasets. There are two main ways to combine data.

You can:

1. **Join** data based on a common field or identifier column.
2. **Use a union** to stack your data tables.

## **Connecting to CSV Files**

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I want to show you what Section C looks like when you connect to flat files such as .csv files (comma separated values files).

I am going to connect to a .csv format of our data tables found in the Excel file dataset. I have not shared these CSV files with you because this is just a quick demonstration of connecting to flat files. However, if you want to follow along, you can easily download the three sheets in the Excel file (*part2\_practice\_dataset.xlsx*) as three separate .csv files using any spreadsheet software.

Going back to the Connect/Open page, I am going to select the **Text file** option in the Connect pane.

# Connect

To a File

Microsoft Excel





Text file

JSON file

PDF file

Selecting Text file option in the Connect pane.

Once you connect to a flat file, you will notice that Tableau is pretty smart and can register other files with the same extension type.

Name	
	<b>practice_dataset.csv</b>
	high_cost_wines.csv
	part2_pract...dataset.xlsx
	wine_experts.csv

Selecting a .csv file in the Tableau navigation window.

Even though I only selected one file to connect to, Tableau will list others found in the folder that are available as data source connections.



## Connections

Add

practice\_dataset


Text file


## Files





Use Data Interpreter

Data Interpreter might be able to clean your Text file workbook.

 high\_cost\_wines.csv

 practice\_dataset.csv

 wine\_experts.csv

 New Union

In Section C of the Data Source page, Tableau is able to register other files that have the same extension type of the selected file.

I think that's really neat! 🤖

## Summary

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- It is very important to get familiar with the Data Source page.
  - Section A allows you to connect to the homepage, undo/redo your work, and save.
  - Section B shows you the **data sources** that are connected to the workbook.
  - Section C allows you to enable *Data Interpreter*, see a list of the the Excel *Sheets or Files* that you can connect to and combine data.