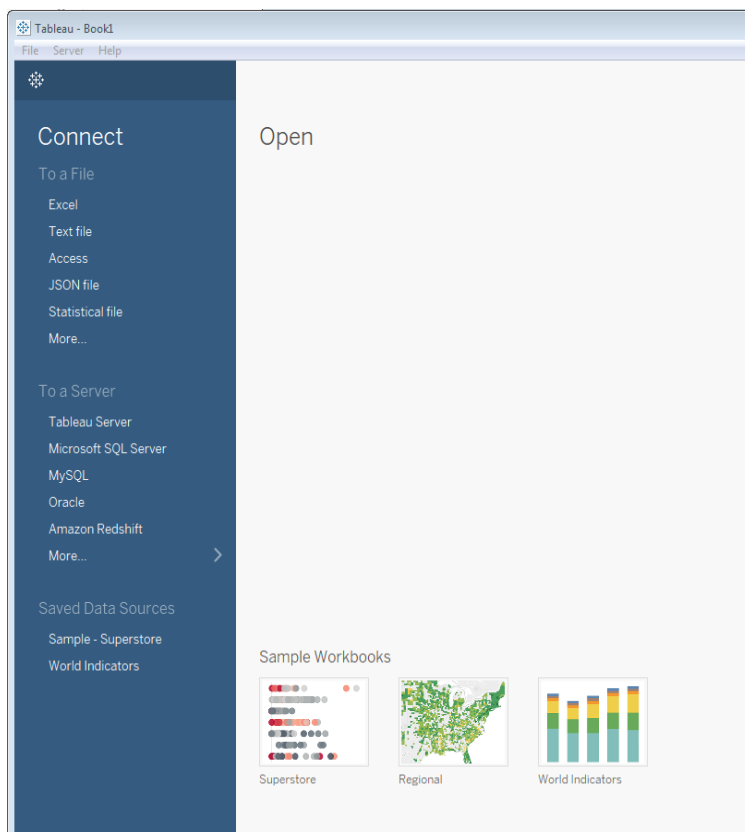# Connecting to Data Sources: Connection Pane

In Tableau Desktop the connect pane is where the user can connect to data sources. This pane appears on the left of the screen when tableau is first opened. The data sources are broken down into two categories: Connecting to a file and connecting to a server. If the data source the user is looking for isn't in the Connect pane, click the "More" button in either the "To a File" or "To a Server" category to display more options.



# Connecting to Data Sources: Servers

We will now cover how to connect to various servers in Tableau Desktop. The server types we will cover are: Tableau Server, Microsoft SQL Server, Microsoft Analysis Services, Oracle and the Web Data Connector.

**Connecting to Tableau Server:** From the connection pane select the Tableau Server Option. This will open up the Tableau Server Sign in box. Under server enter our tableau site https://tableau.mt.gov and click connect.
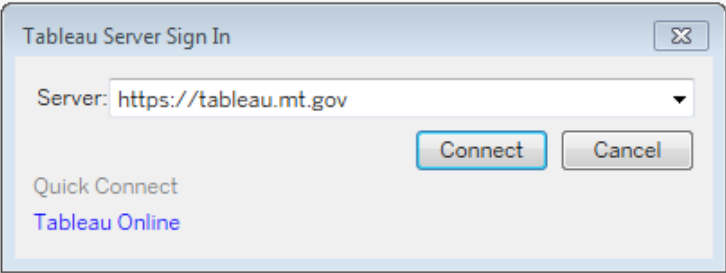


The user will then be prompted for their Username and Password for the tableau server. Enter your credentials and click sign in.



After entering your credentials, the project sites that can be connected to will pop up. Select the site you would like to connect to. Each user will have different options with which site they can connect to depending on what their permissions are.

**Select a Site**

Search for a site       🔎

DLI Reporting

DOA HCBD

DOA Healthcare Data

DOA SITSD Approvals

DOA SITSD Leg Tracker

DOA SITSD Scorecard

GOV Scorecard

HHS MFSIS

**Connecting to Microsoft SQL Server:** From the connection pane select the Microsoft SQL Server option. This will open up the box pictured below that will prompt for the server and login credentials to connect. Entering the database name to connect to is optional. There are two different ways to connect to a SQL Server. The first is through windows authentication, which won't require any additional login credentials to be entered.  The second is through using a specific username and password. Enter the appropriate credentials and click sign in.

       **Windows Authentication:**

Microsoft SQL Server    ✕

Server:    \<Server name\>

Database:    \<Database name\>

Enter information to sign in to the database:

◉ Use Windows Authentication (preferred)

○ Use a specific username and password:

     Username:

     Password:

☐ Require SSL
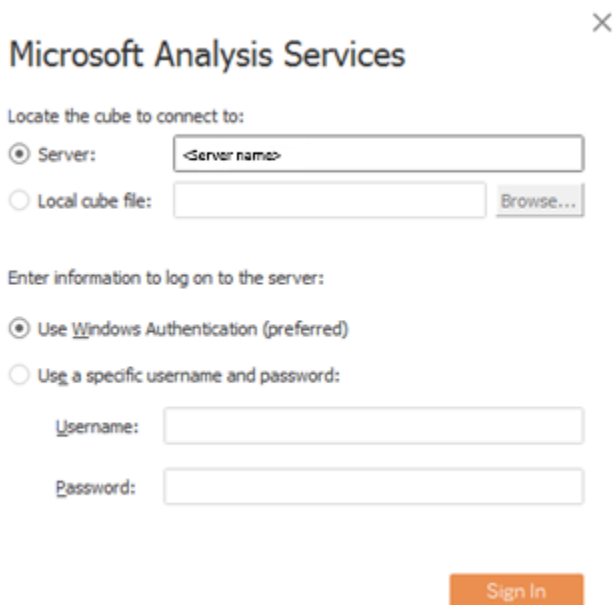☐ Read uncommitted data

Initial SQL...          Sign In

**Specific Username and Password:**



## Connecting to Analysis Services: From the connection pane select the Microsoft Analysis Services option. This will open up the box pictured below that will prompt for the server and login credentials to connect. Enter the appropriate credentials and click sign in. Analysis services can also connect to a local cube that the user may have saved on their machine.

**Connecting to Oracle:** From the connection screen select the Oracle option. This will open up the box pictured below that will prompt for the server and login credentials to connect. Enter the appropriate credentials and click sign in. Both the "Service" and "Port" categories are optional. There are two different ways to connect to an Oracle Server. The first is through integrated authentication, which won't require any additional login credentials to be entered. The second is through using a specific username and password. Enter the appropriate credentials and click sign in.

**Integrated Authentication:**



**Specific Username and Password:**

**Connecting to Web Data Connector:** From the connection screen select the Web Data Connector option. Enter the URL of the web data connector desired.
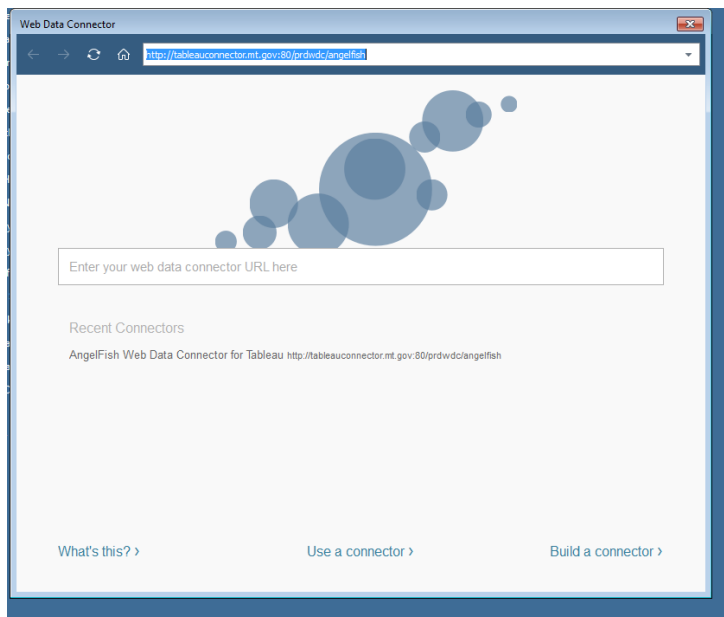


Each data connector is different so the next step will all depend on the URL the user is trying to connect to. In general, the user will be prompted for some additional login information and asked how they will want to view the data. Enter the information and click Get Data. Below is an example of connecting to our AngelFish URL.
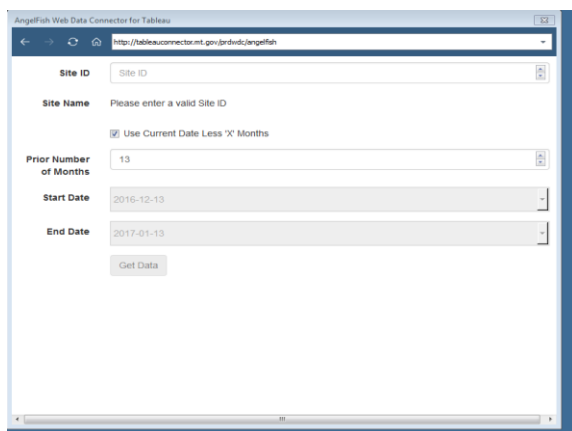
# Connecting to Files

We will now cover how to connect to files in Tableau Desktop. The only method we will be showing is how to connect to an Excel Spreadsheet.

**Connecting to Excel:** From the connection screen select the Excel option. This will open up the windows explorer. Navigate to the excel file you want to connect to and click open.
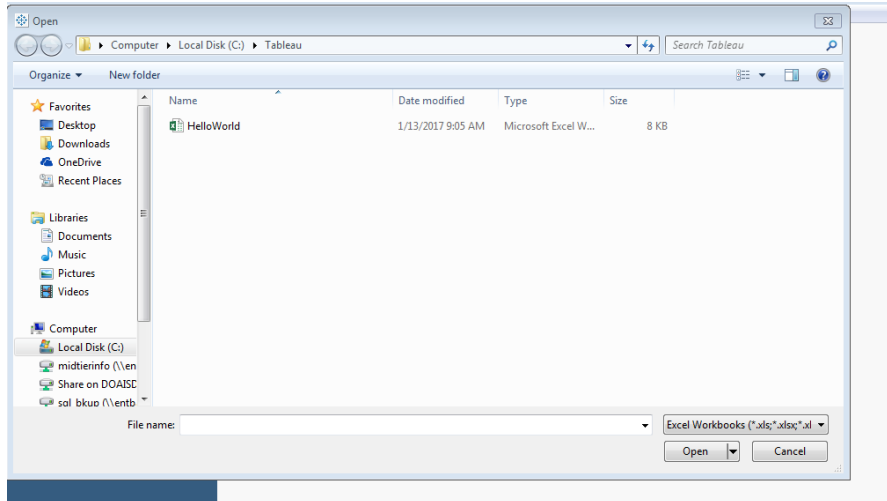


# After Connection

Now that the data source has been connected to, the user will generally find themselves looking at some variation of the screen below. This is an example of connecting to Microsoft SQL Server. The appearance will change depending on which data source was used. In general, the user will be shown tables or data and a way to connect them together so that they can be shown in the way they want.  Drag the desired tables or data over to the "Drag Tables Here" area and then begin manipulating it in the sheets tab at the bottom of the page.

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File  Data  Server  Window  Help

Connection Information
Server name
Database name
List of Tables

Table name (Database)

Drag tables here

Sort fields | Data source order ▾          Show aliases   Show hidden fields   10000 → rows

Data Source   Sheet 1



Data Source   Sheet 1