

Github : <https://bacrepo.github.io/bac-tab-pulse-workshop/>

Download Files for Workshop

## Workshop Task

### 1. Tableau Pulse Introduction

**\*\* Instructor Led \*\***

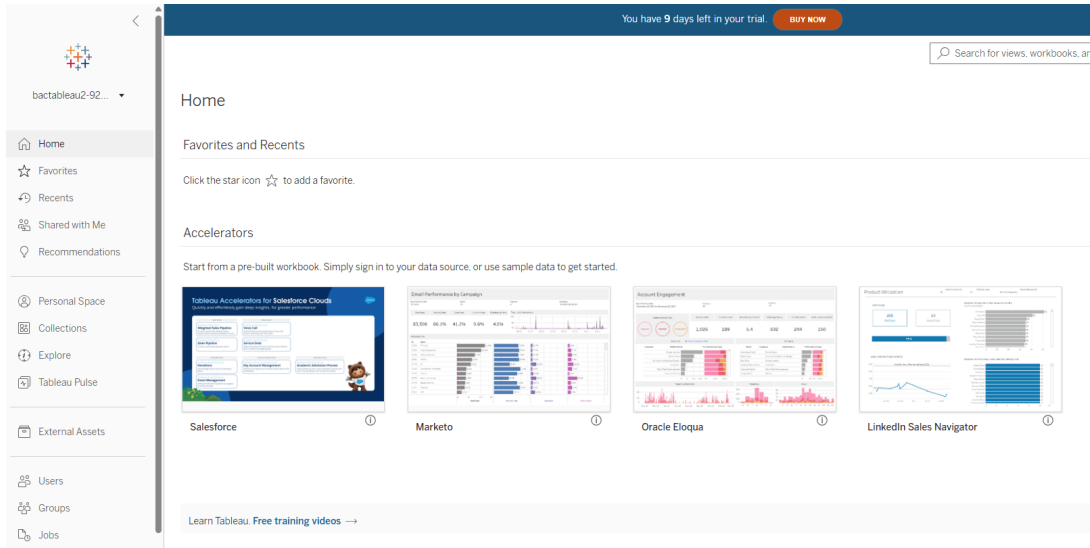
- Instructor will give you overview of Tableau Pulse



### 2. Tableau Cloud User Interface

**\*\* Instructor Led \*\***

- Instructor will give you a walkthrough of Tableau Cloud Interface



### 3. Accessing Tableau Pulse and Tableau AI

#### **\*\* Instructor Led \*\***

- Instructor will tell you about how to enable Tableau AI
- Instructor will guide you through Tableau Pulse interface

#### AI in Tableau

Turn on generative AI functionality for Tableau features. This functionality might not be available to some customers, such as Government Cloud customers.

Generative AI can produce inaccurate or harmful responses. You assume responsibility for how the outcomes of AI in Tableau are applied to your organization. [Learn more](#)

#### AI Settings by Feature

Turn on Tableau AI features for all users on this site, or restrict access to only users in a selected user group. [Learn more](#)

Features	Feature status	Select User Gro...	Actions
Tableau Pulse: Summarizes key metric insig...	✔ Turned On	All Users	...
Tableau Pulse: Gets better semantic match...	✔ Turned On	All Users	...
*Tableau Pulse: Uses Pulse Discover for an i...	✔ Turned On	All Users	...
*Tableau Viz Authoring: Builds visualization...	✔ Turned On	All Users	...
*Tableau Prep: Suggests steps to clean and ...	✔ Turned On	All Users	...
Tableau Catalog: Drafts asset descriptions	⊘ Requires Salesforce Connection	None	...

*\*These features are part of your trial. To continue using them after your trial expires, you'll need Tableau+ and a connection to a Salesforce org that has Einstein generative AI set up.*

By turning on these features you are agreeing to the following terms:

#### 4. Prepare Published Data Source (PDS)

**\*\* Instructor Led, Then Follow \*\***

- Instructor will guide you how to create published data source in Tableau Cloud using **SuperStoreSimple.csv**

- Due to **shared tenant**, Data Source Name must be renamed to defined number like -01, -02, -03 (Instructor will guide you)

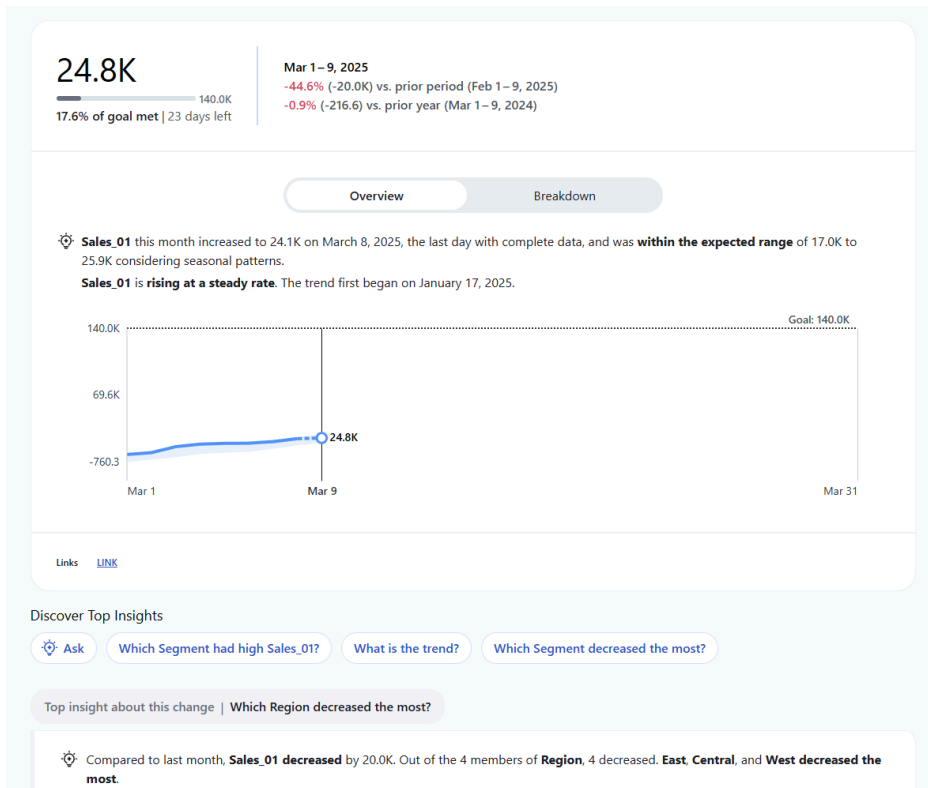
Students will need to publish **Simple-01, Simple-02, Simple-03 ....** Dataset as instructed

The screenshot displays the Tableau Cloud 'New Data Source' configuration interface. The interface is divided into several sections:

- Menu Bar:** File, Data, Analysis, Map, Help
- Toolbar:** Navigation and action icons.
- Data Panel:** Shows the data source 'SuperStore' with a search bar and a list of fields: Order Date, Order ID (selected), Order Year Month, Postal Code, Product ID, Product Name, Region, Row ID, Segment, Ship Date, Ship Mode, Stat, Sub Category, and Measure Names.
- Analytics Panel:** Includes sections for Pages, Filters (Measure Names), Marks (Automatic), and Measure Values (SUM(Profit)).
- Columns Panel:** Measure Names
- Rows Panel:** YEAR(Order Date)
- Preview Table:** A table showing data for years 2021-2025 with columns for Year of Ord., Profit, and Sales.

Year of Ord..	Profit	Sales
2021	32,266	332,888
2022	59,637	473,306
2023	81,108	587,790
2024	100,183	721,300
2025	19,103	211,250

## 5. Create Simple Pulse Metric “Sales Simple”



- Instructor will let you create new Pulse Metric
- Instructor will clearly explain you about Tableau Pulse Metric options for each configurable
- Recommended Filters : **Category, Region, Segment**

Tableau Pulse

Search

**1** Core Definition

2 Time

3 Goal and Threshold

4 Insights

5 Governance

Core Definition

Details

Data source  
SuperStoreSimple

Name \*  
SalesSimple

Description

Links 0/5  
Add Link

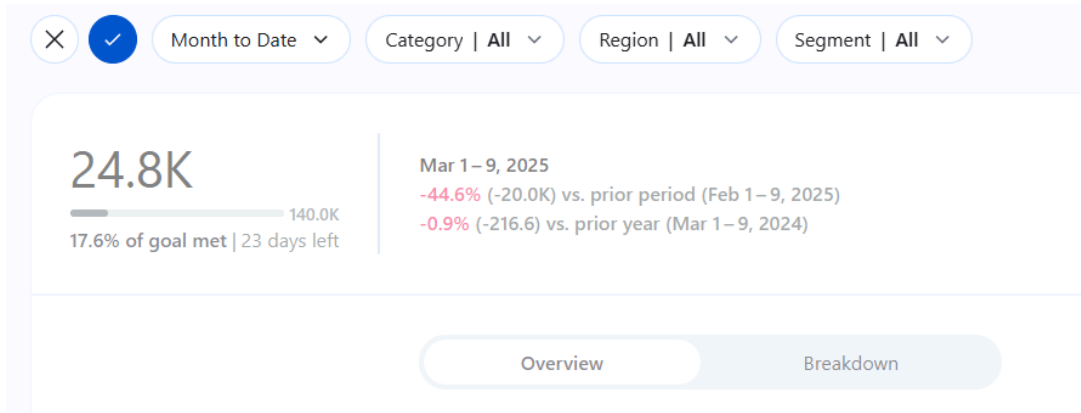
Value Clear Selections

SalesSimple

Start creating your definition  
Select a measure and a time dimension to see a preview.

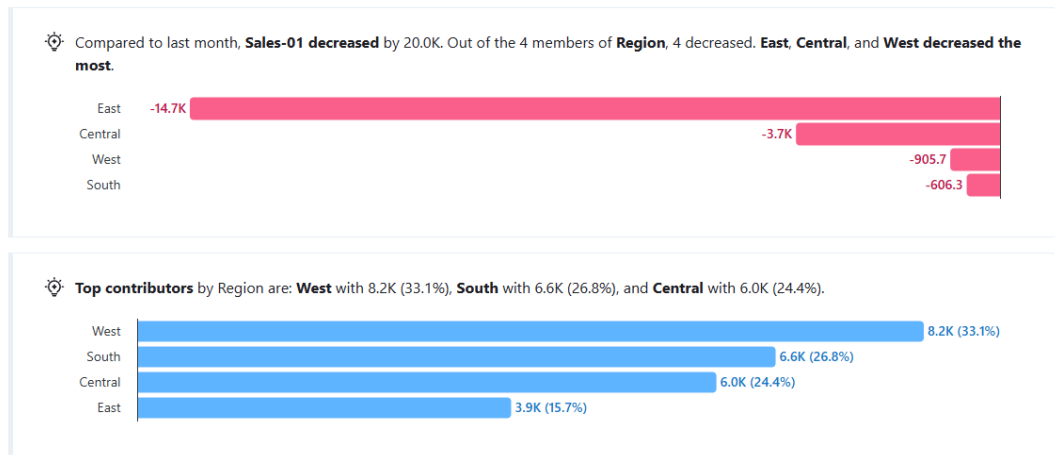
## 6. Pulse Metric Definition

- Instructor will show you what makes a metric definition



## 7. Pulse Metric Explanation

- Instructor will guide you how to explain Tableau Pulse generated insight

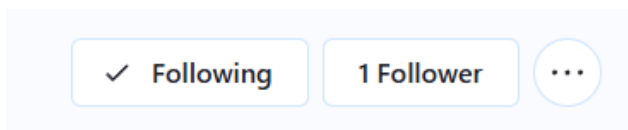


### Insight Group

- Top Contributor
- Top Detractor
- Grouped Contributor / Detractor
- Polarity
- Significantly **Decreased (By Time)** / **Increased (By Time)**

## 8. Follow Pulse Metric

- Instructor will show you how to follow a pulse metric and digestion option



## Preferences



### Choose how to receive Tableau Pulse digests

Customise how you want to receive metric digests. By default, digests are sent to all channels.

Slack  Your admin has turned off this channel.

Email

### Choose how frequently you receive digests

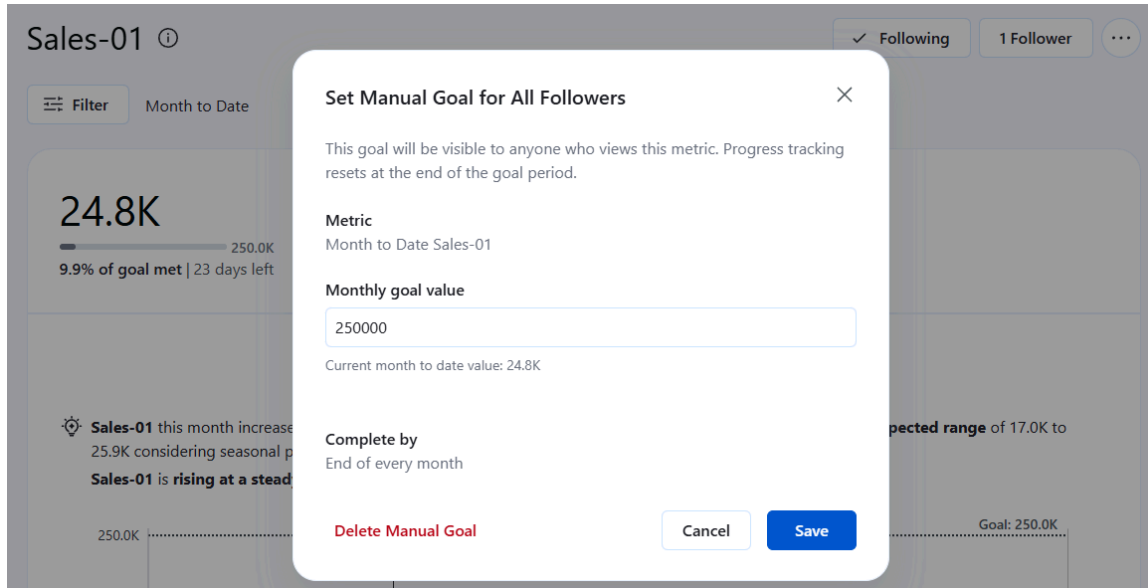
By default, digests are sent weekly.

- Daily
- Weekly
- Monthly

Digests are sent daily at 4:00 AM UTC (11:00 AM GMT+7).

## 9. Set up Tableau Pulse Goal

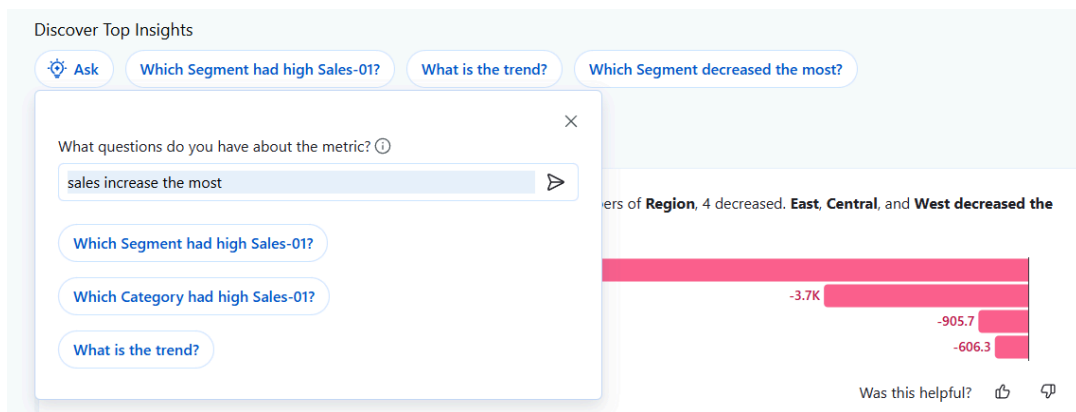
- Instructor will guide you to set up Tableau Pulse Goal



[https://help.tableau.com/current/online/en-us/pulse\\_goals.htm](https://help.tableau.com/current/online/en-us/pulse_goals.htm)

## 10. AI-Based Insight searching

- Instructor will guide you about how to ask Tableau Pulse for Insight



## 11. AI-Based Chat with Data

Recent Tableau Pulse introduced Tableau Pulse Discover, and instructor will show you how to make the use of it.

### Discover

Question | What happened to Marketing Pipe \$? 3:11 AM

◇ Marketing Pipe \$ dropped significantly this month, falling by 51.1% to \$26.2M compared to February [1]. This amount is also below the expected range of \$26.7M to \$31.4M for March [2]. The decrease was most notable in the AMER region, which saw a reduction of \$28.3M [3].

Metric Sources (1) ▾

Was this helpful? 👍 👎

◇ What caused the decrease in Marketing Pipe \$?   ◇ How did other regions perform?

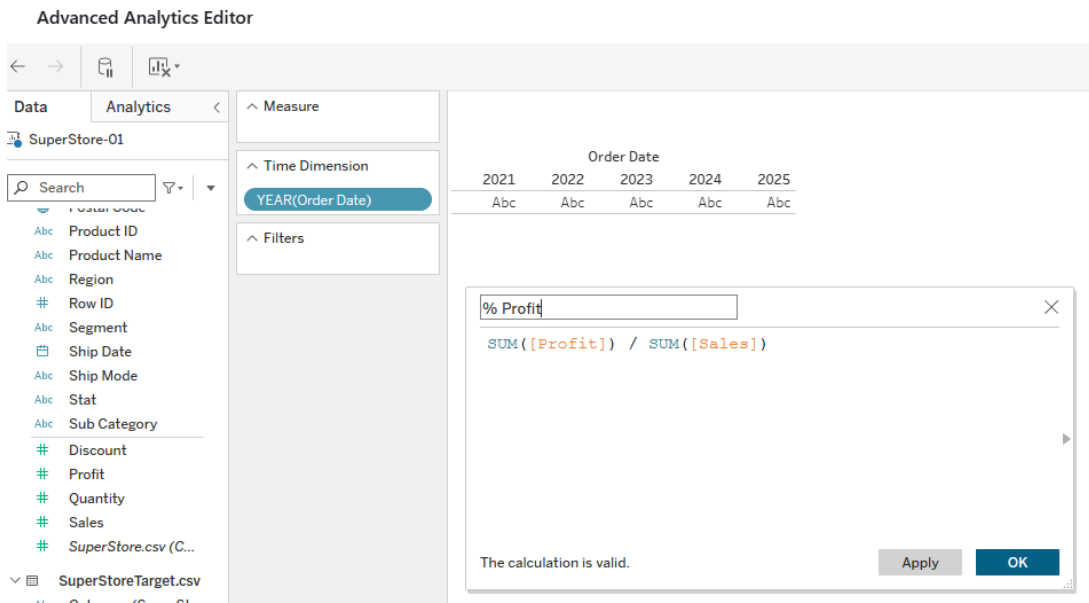
What happened in AMER ➤

This tool uses generative AI, which can produce inaccurate or harmful responses. [Learn more](#)

## 12. Compound / Composite Metric for Data Analysis

- Instructor will guide you how to create compound metric in Pulse Metric Definition

**Advanced Analytics Editor**



SuperStore-01

Search

Product ID  
Product Name  
Region  
Row ID  
Segment  
Ship Date  
Ship Mode  
Stat  
Sub Category  
Discount  
Profit  
Quantity  
Sales  
SuperStore.csv (C...  
SuperStoreTarget.csv

Measure

Time Dimension

YEAR(Order Date)

Filters

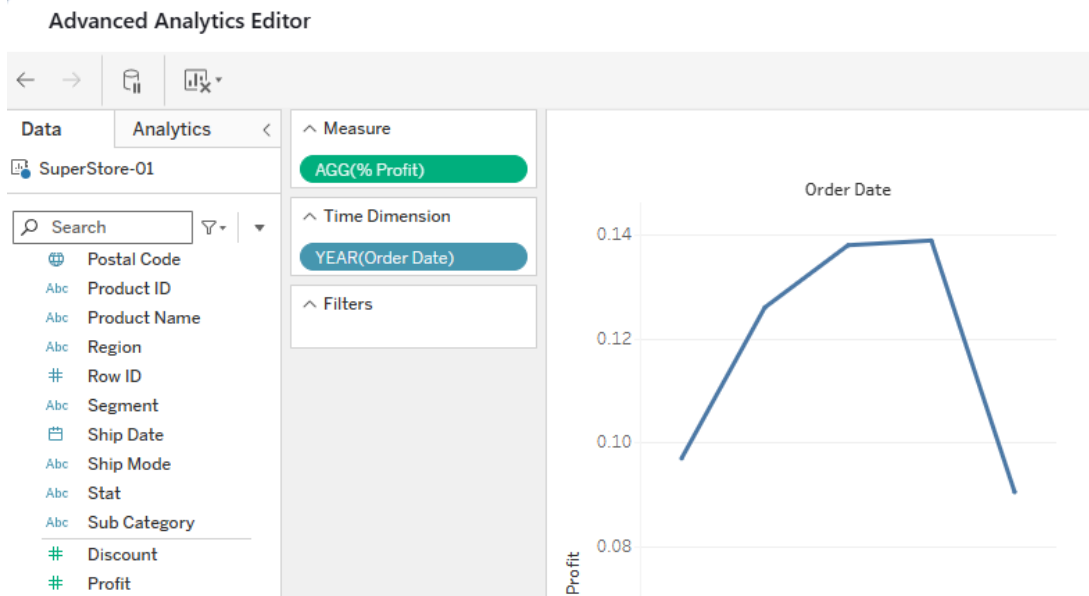
Order Date				
2021	2022	2023	2024	2025
Abc	Abc	Abc	Abc	Abc

% Profit

$SUM([Profit]) / SUM([Sales])$

The calculation is valid.

Apply OK



### 13. Insight Analysis

- Instructor will guide you through the insight interpretation and what are the importances of compound metrics

## Composite Metrics will make AI even better

Composite metrics provide a more complete picture than single metrics.

They combine different factors, leading to better decisions, capture business complexity, reduce bias, and clearer communication of complex information.

Analysis Skill Needed



Time-Variant

- Week to Date
- Month to Date
- Quarter to Date
- Year to Date
- VS Yesterday
- VS Last Week
- VS Last Month
- VS Last Quarter
- VS Last Year

Automated By Tableau AI

Baseline

Revenue, Quantity, Order

Derived Metric

Rev. per Quantity = Revenue/Quantity  
Rev. per Order = Revenue/Order

Filtering Columns

Automated By Tableau AI

- By Product Group
- By Region/Area

### 14. How to Prove Tableau Pulse is Correct ? (Optional)

- Instructor will guide you how to test the validity of insight which Tableau Pulse is generated for each use case.

The screenshot shows the Tableau Desktop interface with a data table for 'SuperStore-01'. The table is titled 'Sheet 1' and displays sales data for the year 2025, categorized by Segment and Category. The columns are Segment, Category, and Order Date (2025). The data is as follows:

Segment	Category	Order Da...
Consumer	Furniture	2,700
	Office Supplies	465
	Technology	408
Corporate	Furniture	673
	Office Supplies	1,753
Home Office	Technology	164
	Office Supplies	306

## 15. Set up Tableau Pulse Dynamic Goal - Published Data Source

Download new dataset

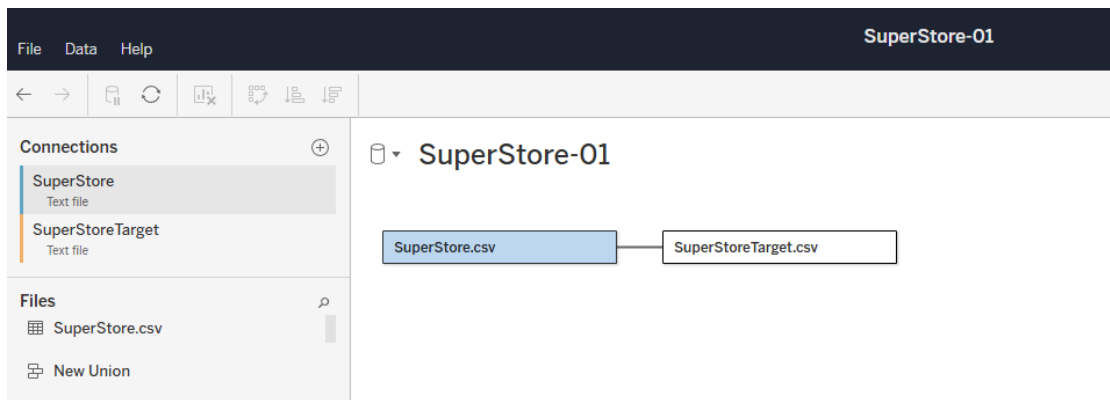
### SuperStore

<https://bacrepo.github.io/bac-tab-pulse-workshop/SuperStore.csv>

### SuperStoreTarget

<https://bacrepo.github.io/bac-tab-pulse-workshop/SuperStoreTarget.csv>

- Instructor will guide you to add more dataset into the data model



Make a relationship between OrderYearMonth and TargetYearMonth  
Then Category, and Segment

## SuperStore-01



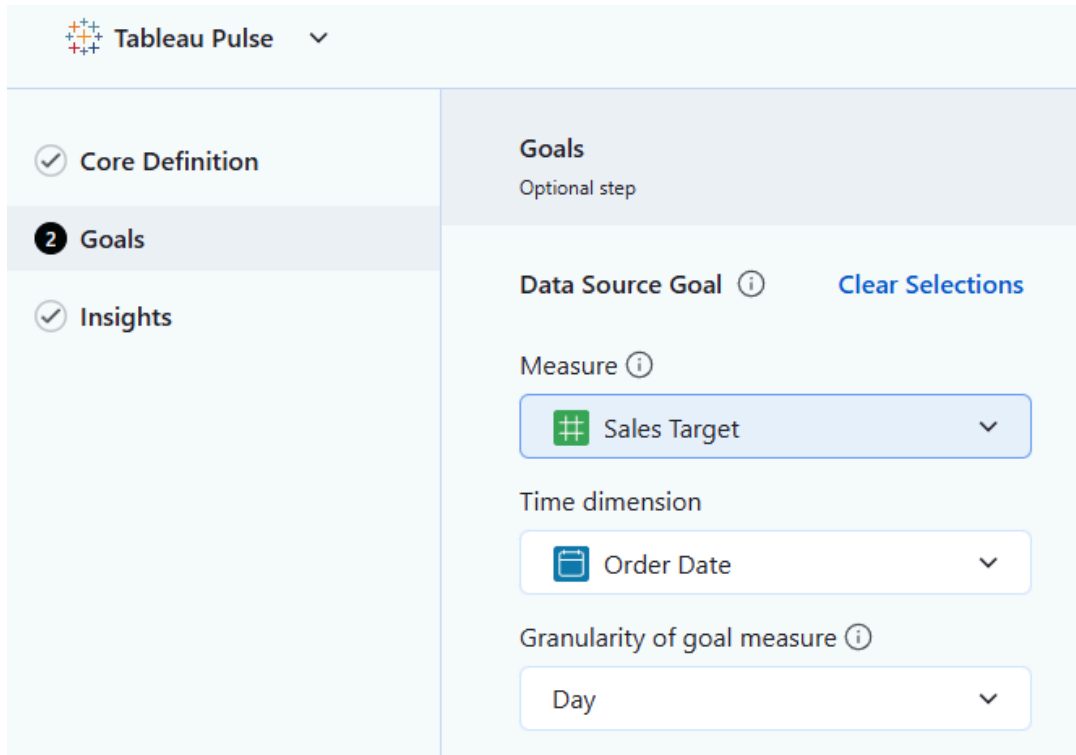
SuperStor... — SuperStor... ▼

How do relationships differ from joins? [Learn more](#)

SuperStore.csv	Operator	SuperStoreTarget.csv
# OrderYearMonth ▼	= ▼	# TargetYearMonth ▼
Abc Category ▼	= ▼	Abc Category (SuperStoreTarget ▼
Abc Segment ▼	= ▼	Abc Segment (SuperStoreTarget. ▼

## 16. Set up Tableau Pulse Dynamic Goal - Metric Definition

- Instructor will guide you to set Measure for Goals



The screenshot shows the Tableau Pulse interface for configuring a dynamic goal. On the left, a sidebar contains three steps: 'Core Definition' (checked), 'Goals' (active, indicated by a '2' in a circle), and 'Insights' (checked). The main area is titled 'Goals' and is labeled as an 'Optional step'. It features a 'Data Source Goal' section with an information icon and a 'Clear Selections' link. Below this, there are three dropdown menus: 'Measure' (set to 'Sales Target'), 'Time dimension' (set to 'Order Date'), and 'Granularity of goal measure' (set to 'Day').

Tableau Pulse

Core Definition

2 Goals

Insights

Goals  
Optional step

Data Source Goal ⓘ Clear Selections

Measure ⓘ  
Sales Target

Time dimension  
Order Date

Granularity of goal measure ⓘ  
Day

## 17. Mobile Application

- Instructor will guide you how to consume Tableau Pulse data on Tableau Mobile Application (iOS and Android)

The image displays two side-by-side screenshots of the Tableau Pulse mobile application. The left screenshot shows the 'Today's Pulse' section, which provides an insight summary last refreshed about 22 hours ago. It features a diamond icon and text stating: 'Annual Exchange Rate is 4.28% lower than last year; yesterday's Exchange Rate dropped by 5.06% compared to the same day last year. Overall, 2 of 6 metrics changed: 2 favorably.' Below this, there are two 'Exchange Rate' entries: 'Yesterday' at 33.8 (-1.9 vs. prior year, -5.3%) and 'Year to Date' at 34.0 (-1.5 vs. prior year, -4.3%). A 'My Investment' section shows 'No data yet for the current period.' The right screenshot shows the 'Recommendations' section, which displays a grid of dashboard thumbnails. The thumbnails include: 'Overview Superstore' (a US map), 'Area Analysis Thai Tourism Insight' (a map of Thailand), 'Win/Loss Dashboard R203 Analysis V.4' (a bar chart), 'Dashboard 1 test\_aa' (a horizontal bar chart), and another 'Win/Loss Dashboard R203 Analysis V.3' (a line chart). Both screenshots have a bottom navigation bar with 'Home', 'Explore', and 'Pulse' icons.

## Tableau Pulse Pitching

- Instructor will tell you that, using Tableau Pulse, just the technical aspects are not enough and we will need more business aspects to make it successful.

## Your Turn !

Download the dataset (Workshop.csv)

<https://bacrepo.github.io/bac-tab-pulse-workshop/Workshop.csv>

Then perform these things

- Define business goal
- Feature selection (Select which are relevant columns, to use or to exclude)
- Compound metric creation
- Find insight for this dataset
- Consume content on your phone