

# Hands-on Lab: Getting Started with Tableau Online

Estimated Effort: **60** minutes

Emerging technologies continue to revolutionize the business world. In this competitive environment, every company wants to use the latest technology trends to achieve maximum growth. Business intelligence is key in supporting the entire data analytics cycle, from discovery to operationalization, to facilitate strategic business decisions.

You need to present many complex business scenarios such as a company's annual global sales, labor effectiveness by department, and more. It can be difficult to present this information in an easy-to-understand format; however, business scenarios presented in a visual format, like a graph or a chart, can produce a lasting impression.

As an end user, you may wonder which visualization tools can be leveraged in the business intelligence platform to promote the best business decisions. One such powerful, feature-rich visualization tool is Tableau.

With Tableau, you can visually explore and interact with data and identify critical insights.

This, in turn, essentially improves data-driven decisions, thereby enhancing your data discovery capabilities.

In this lab, you will learn how to sign up for the Tableau trial plan and learn to navigate the Tableau user interface (UI). You will also learn how to upload external data files to Tableau and create a simple dashboard.

## Required Software

You can use the free Tableau Online trial version (**currently limited to 14 days**) to complete this lab.



## Data Set

IBM publishes this data set, and you can download the data set file directly from here: [CustomerLoyaltyProgram.csv](#)

## Objectives

After completing this lab, you will be able to:

- Describe how to sign up for a Tableau Online trial plan
- Explain how to navigate the Tableau user interface
- Create a simple dashboard with Tableau Online

## Exercise 1: Sign Up for the Tableau Online Trial Plan

In this exercise, you will learn how to sign up for a Tableau Online trial plan.

1. Once you open Tableau Online, you will see the page below. Fill in the registration details and click **Start Free Trial**.

tableau.com/product/trial


Why Tableau Products Solutions Resources Partners

TRY FREE EXPLORE OPTIONS

## Start your free trial of Tableau

No credit card required. With the Tableau Free Trial, you can:

- Create, edit, and share visualizations in the cloud.
- Prepare, connect and manage your data anywhere.
- Analyze & collaborate with your team.
- Your Tableau Cloud trial includes Prep Builder.



First Name  
Last Name

Business E-mail  
Phone

Organization  
Company Size

Department  
Job Roles

Country/Region

By registering, you confirm that you agree to the processing of your personal data by Tableau as described in the [Privacy Statement](#).

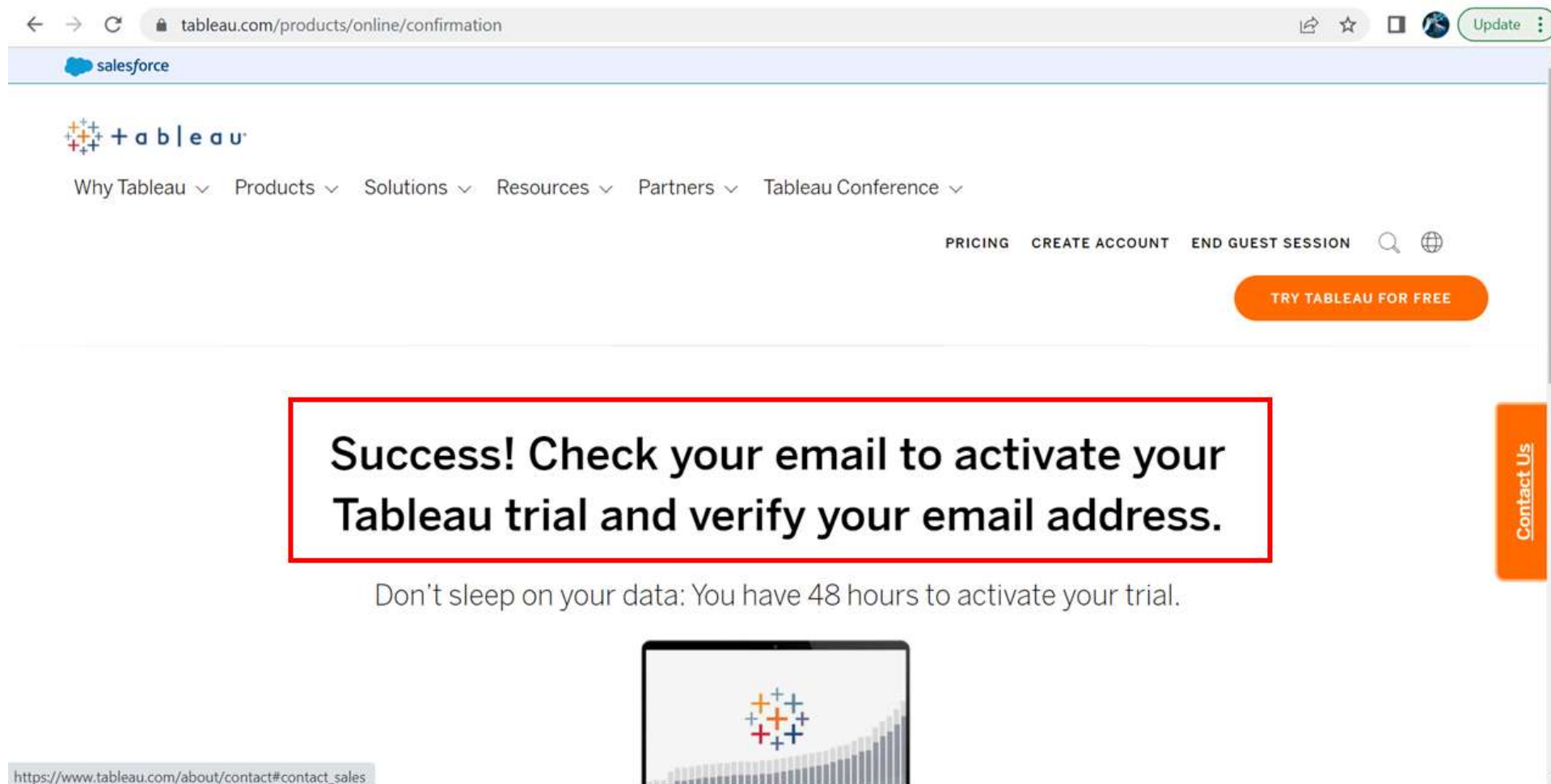
START FREE TRIAL

We respect your privacy. Having trouble?

Sign Up Now

Note: If you do not want to provide specific details, you can complete the form using random values.

2. You will be redirected to a new page with the email verification message.



3. Verify your email by clicking on **Activate account**.

4. Provide the necessary details and select the checkbox to accept the **terms and conditions**.

### Enter Your Name

First

Malika

Last

S

Email

malika

[change email](#)

### Choose a Password

Password

\*\*\*\*\*

Passwords must be a minimum of 8 characters, have at least one uppercase letter, one lowercase letter, one number, and one special character.

Confirm

\*\*\*\*\*

### Name Your Site

Analytics

### Pick Your Site Location

Asia Pacific - Japan

We recommend selecting the region closest to your site users or data.

☐

I've read and agree to the [Tableau Online Subscription Agreement](#), the [Data Processing Addendum \(DPA\)](#) and the [Terms of Service](#). For the avoidance of doubt, agreeing to the DPA via checking this box shall be deemed Customer's signature on the DPA, and without limitation, shall constitute agreement and acceptance of the Standard Contractual Clauses incorporated in the DPA, including their appendices.

5. Log in to your Tableau account.



Sign in to Tableau Online

Email address

malika

Password

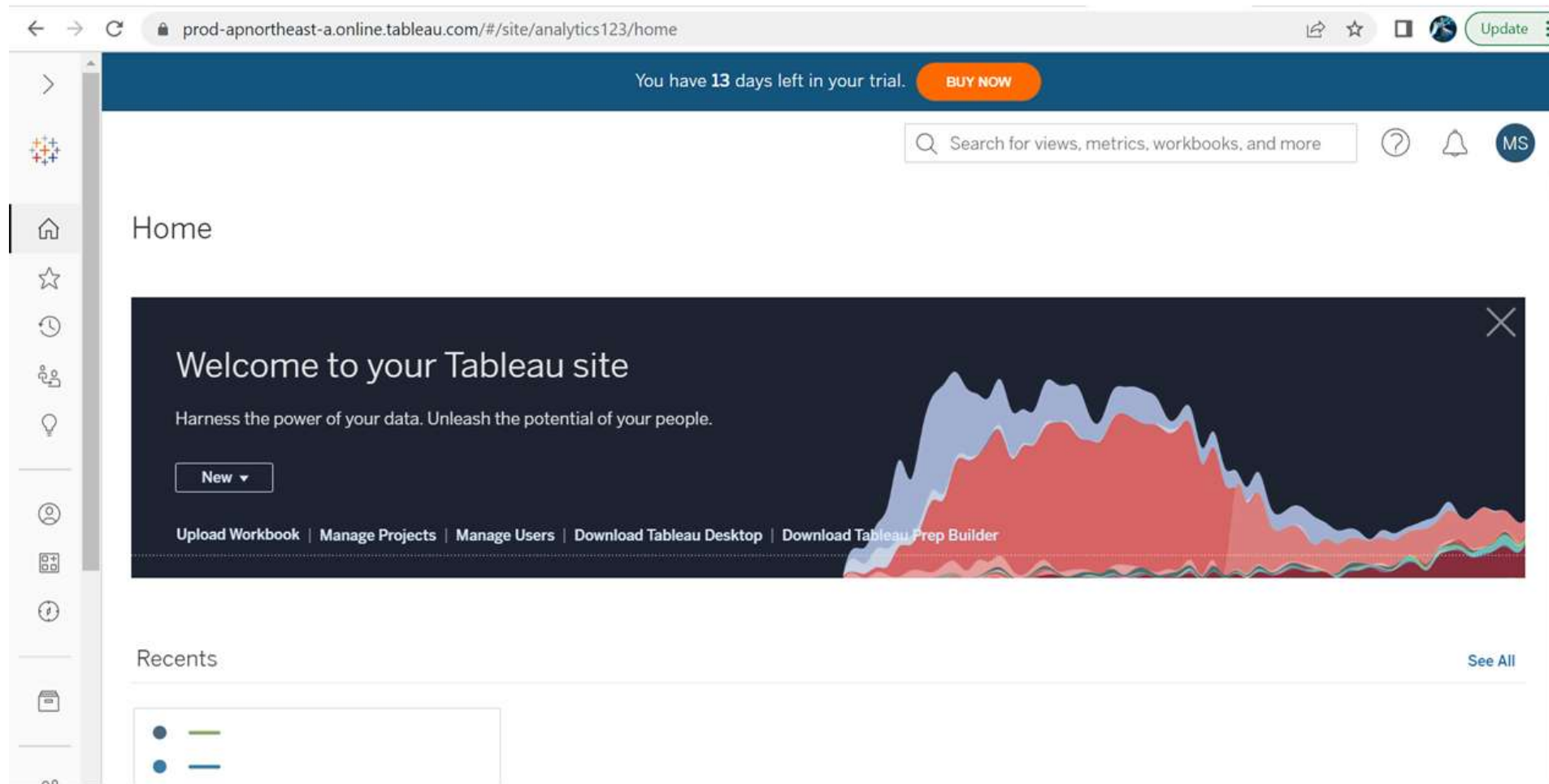
.....

☐ Remember me [Forgot password](#)

Sign In

6. You will be redirected to the Tableau page.


Note: Your Tableau Online 14-day trial begins the day your account is activated.



## Exercise 2: Navigate Tableau Online UI

In this exercise, you will learn to navigate the Tableau Online user interface.

1. In the **Explore** section, you can view several types of existing projects. From the drop-down list, you can select different types of projects, data, flows, and more.



Home

Favorites

Recents

Shared with Me

Recommendations

Personal Space

Collections

Explore

External Assets

Users

Groups

You have 12 days left in your trial. [BUY NOW](#)

Search for views, metrics, workbooks, and more

?

MS

Explore

Top-Level Projects

NewSelect All

Sort By: Name (a-z) ↑

default

The default project that was automatically created by Tableau.

Samples

This project includes automatically uploaded samples.

2. In **External Assets**, you can find databases, files, and tables available within your environment.

- Home
- Favorites
- Recents
- Shared with Me
- Recommendations

---

- Personal Space
- Collections
- Explore

---

External Assets

Users

Groups

You have 12 days left in your trial. [BUY NOW](#)

External Assets 

Databases and Files

New

Select All

Sort By: Workbooks (most-least)

Type	✓	ⓘ	Name	Actions	Workbooks	Data sources	Server / Path	Connection type
	<input type="checkbox"/>		a185e8b5-0884-4023-b7...	...	1	0	a185e8b5-0884-4023-b7...	Tableau Data Engine
	<input type="checkbox"/>		77e4e5c4-11c9-4bcc-820...	...	1	0	77e4e5c4-11c9-4bcc-820...	Tableau Data Engine
	<input type="checkbox"/>		0de310f3-88f3-4824-9a...	...	1	0	0de310f3-88f3-4824-9a...	Tableau Data Engine
	<input type="checkbox"/>		8e62cb21-01be-417e-b53...	...	1	0	8e62cb21-01be-417e-b53...	Tableau Data Engine
	<input type="checkbox"/>		8a396344-de29-4931-b8...	...	1	0	8a396344-de29-4931-b8...	Tableau Data Engine
	<input type="checkbox"/>		4d5f2999-4e26-4d72-bb...	...	1	0	4d5f2999-4e26-4d72-bb...	Tableau Data Engine
	<input type="checkbox"/>		Sales Target (US).xlsx	...	1	0	Sales Target (US).xlsx	Microsoft Excel
	<input type="checkbox"/>		Sample - Superstore.xls	...	1	0	Sample - Superstore.xls	Microsoft Excel

## Exercise 3: Create a Simple Dashboard with Tableau Online

In this exercise, you will learn how to:

- Upload external data files to Tableau Online
- Create worksheets
- Create a simple dashboard

### Task A: Upload External Data Files

In this task, you will learn how to upload external data files to Tableau.

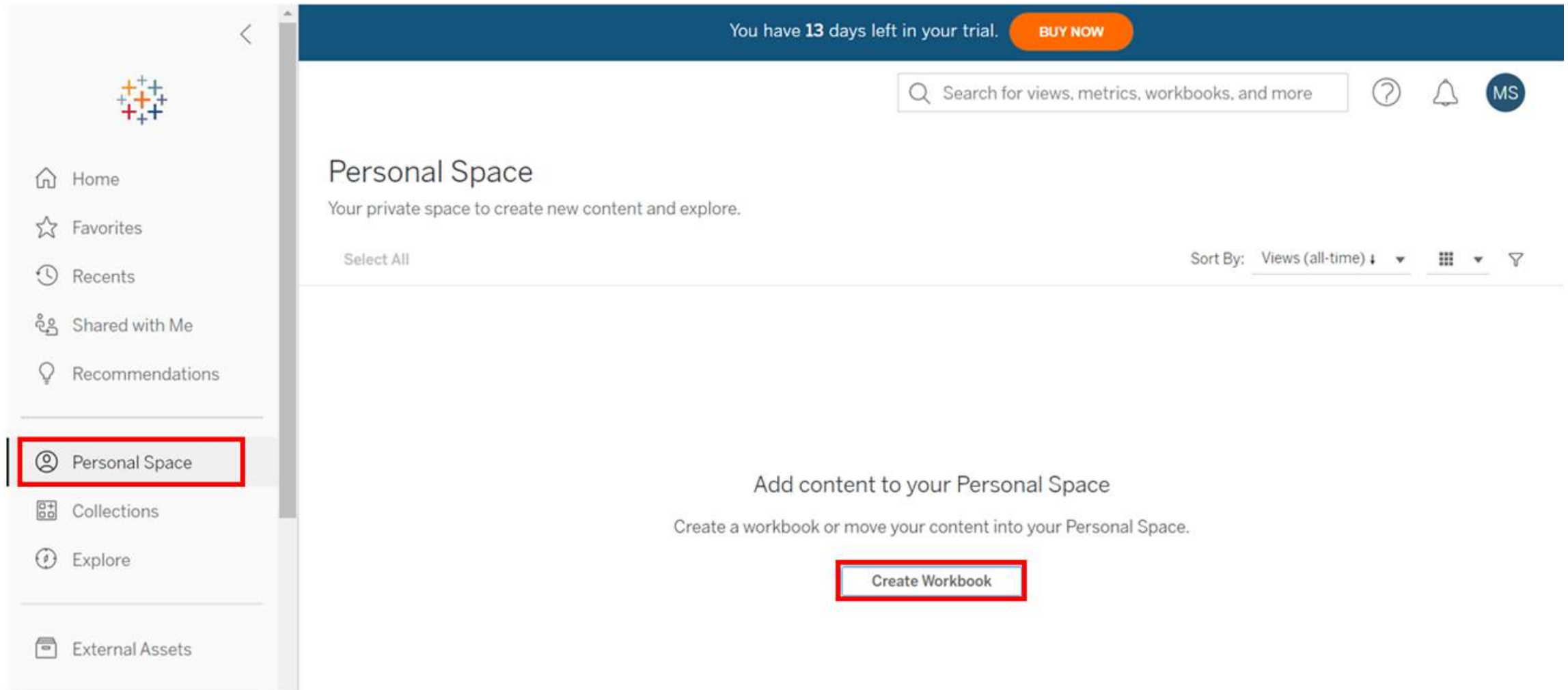
1. To start creating the dashboard:



a. Click **Personal Space**.

b. Click **Create Workbook**.

You will be redirected to a new window.



2. Select **Files** and click **Upload from Computer** to upload the previously downloaded [CustomerLoyaltyProgram.csv](#) file.

## Connect to Data

Connect to the data you need to visualize. [Learn more](#)

On This Site

Files

Connectors

Accelerators

---

Drag and drop a file

or

Upload from computer

---

As highlighted below, you will see different tabs in this working space.

File Data Help

New Workbook

Publish

Malika S

Change the data source as required

Connections Add different connection using + sign

CustomerLoyaltyProgram

Text file

Files Files in your connected data source

CustomerLoyaltyProgram.csv

New Union

CustomerLoyaltyProgram....

Drag the files which you want to connect or have relationship

Need more data?

Drag tables here to relate them. [Learn more](#)

CustomerLoyaltyProgram....

Shows available data in the dataset

Name	CustomerLoyaltyProgram.csv	CustomerLoyaltyProgram.csv	CustomerLoyaltyProgram.csv	CustomerLoyaltyProgram.csv
CustomerLoyaltyProgram.csv	Loyalty#	First Name	Last Name	CustomerLoyaltyProgram.csv

Fields

Update Now

Data Source

Sheet 1

Explore the workbook area for creating visualizations.

The screenshot shows the Tableau Online interface with several red boxes and arrows highlighting key features:

- Top Bar:** Contains menu items (File, Data, Worksheet, Dashboard, Analysis, Map, Format, Help), a "New Workbook" button, a "Publish" button, and a user profile "Malika S".
- Toolbar:** A row of icons for navigation and visualization, with a red box around it labeled "Different Format options".
- Left Panel:**
  - Data Source:** "CustomerLoyaltyProg..."
  - Search:** A search bar.
  - Tables:** A list of fields including City, Country, Coupon Response, Customer Name, Education, First Name, Gender, Last Name, Location Code, Loyalty Status, Marital Status, Order Year, Postal code, Product Line, Province or State, and Quarter.
  - Filters:** A section for adding filters.
  - Marks:** A section for adding marks, with a dropdown set to "Automatic" and buttons for Color, Size, Text, Detail, and Tooltip.
- Right Panel:**
  - Columns:** A section for adding columns, with a red box around it labeled "Different plots and charts".
  - Rows:** A section for adding rows.
  - Sheet 1:** The main visualization area, labeled "Area to create the Visualizations" and "Drop field here".
- Bottom Bar:** Contains a "Data Source" button, a "Sheet 1" button, and icons for "Add new worksheet", "Create Dashboard", and "Create Story".

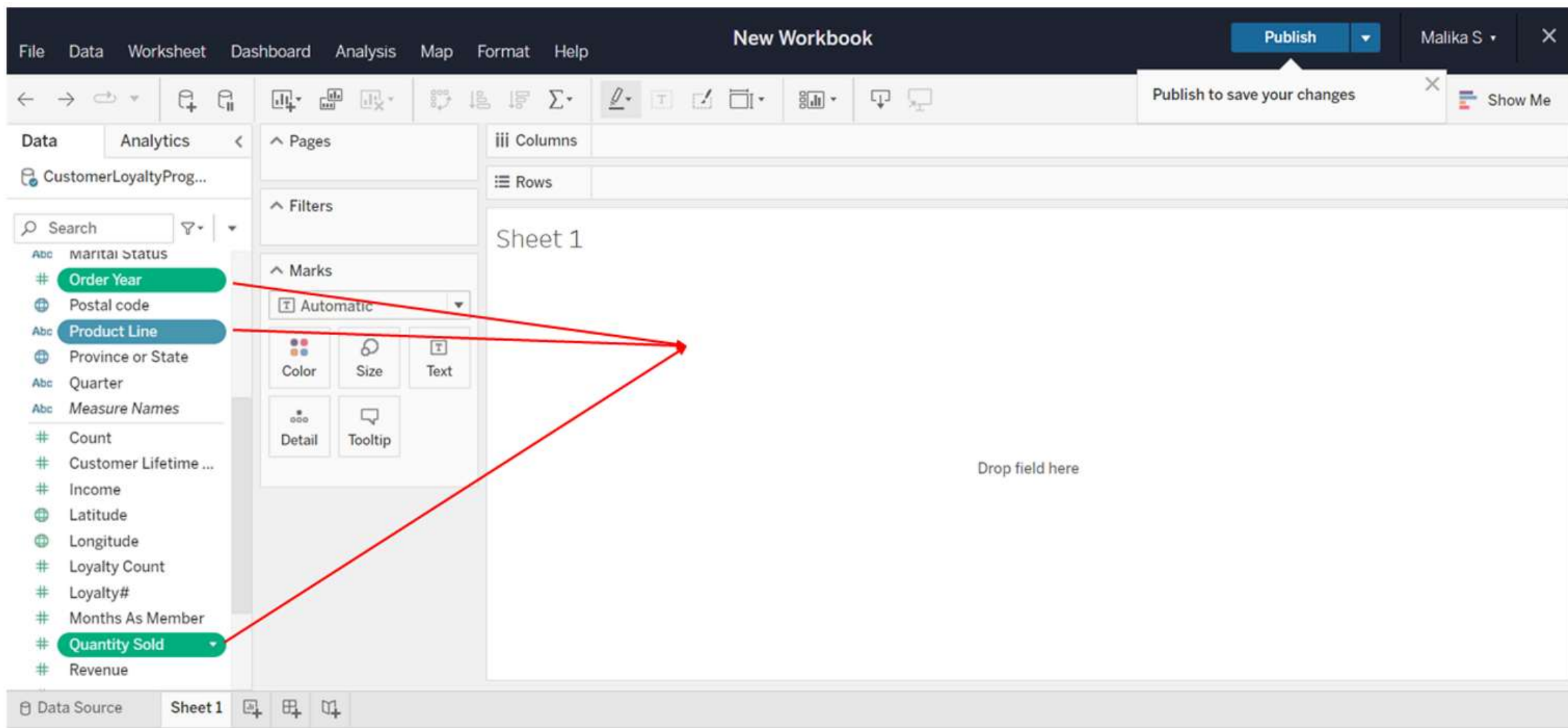
Red text annotations provide further context:

- "To create filter, pages and format the visualization" points to the Marks card.
- "Available columns in the dataset" points to the Tables list.
- "Add new worksheet" points to the bottom bar icon.
- "Create Dashboard" points to the bottom bar icon.
- "Sheet 1 is a worksheet. Right click to rename the worksheet." points to the "Sheet 1" button.

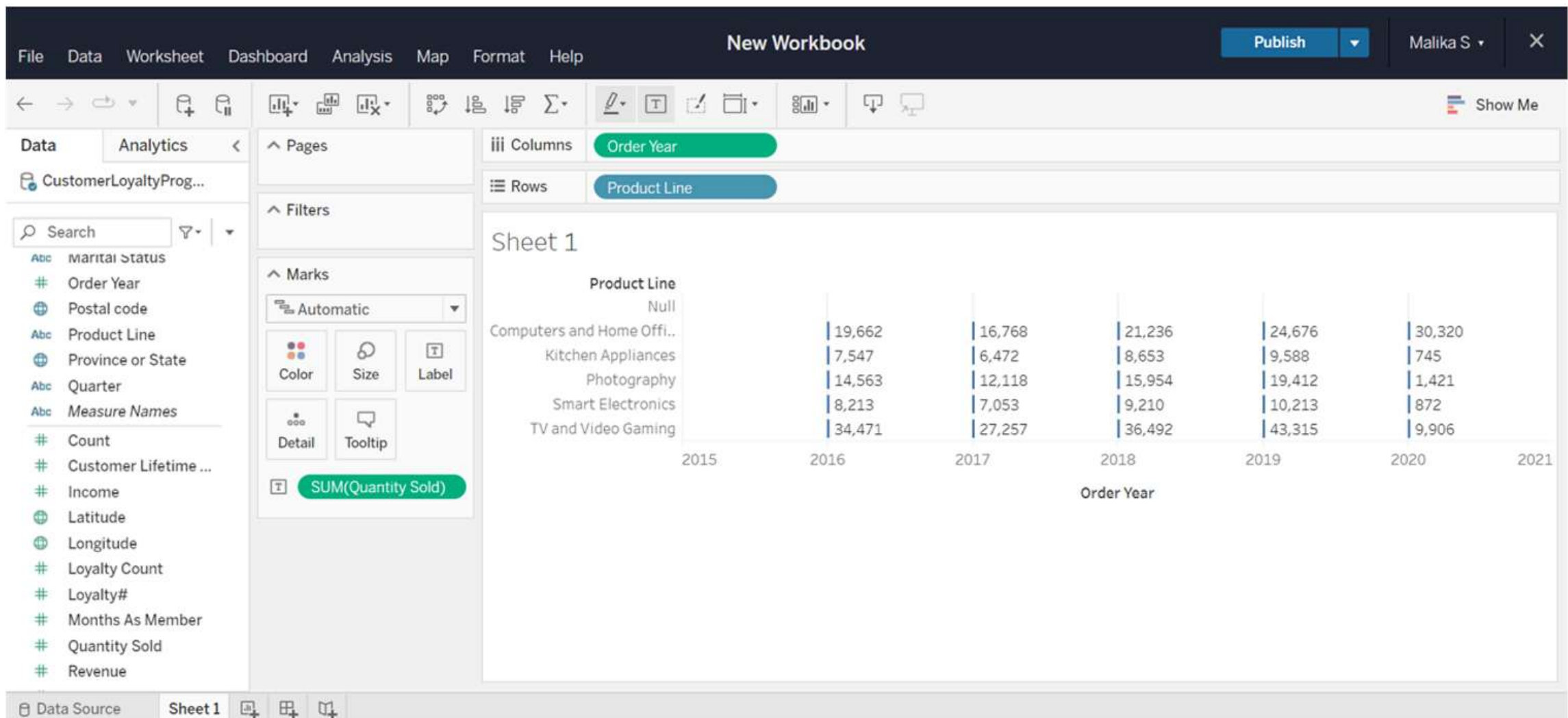
## Task B: Create Workbook

In this task, you will learn how to create worksheets with Tableau Online.

1. Press the CTRL key and select **Order Year**, **Product Line**, and **Quantity Sold**. Then release the CTRL key and drag these items to the visualization area.



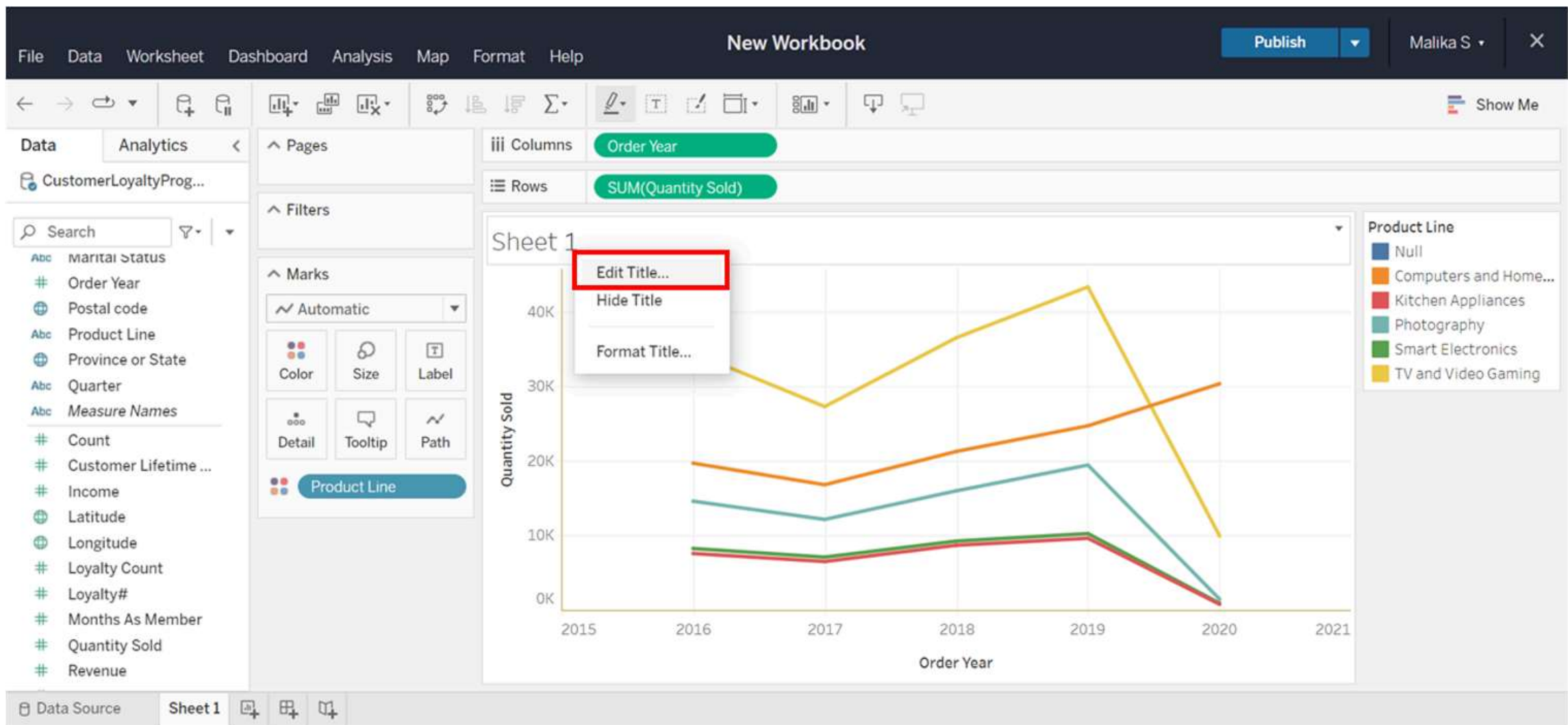
2. Data will appear as shown:



3. Click **Show me** and select the **line plot** icon to create a line plot visualization.







5. Add the title in textbox as **Product Line Performance by Year**. Format the text using various formatting options such as type, font, and color. Click **Apply** and then click **OK**.



Edit Title

Arial

14

B

*I*

U

Insert

Clear Formatting

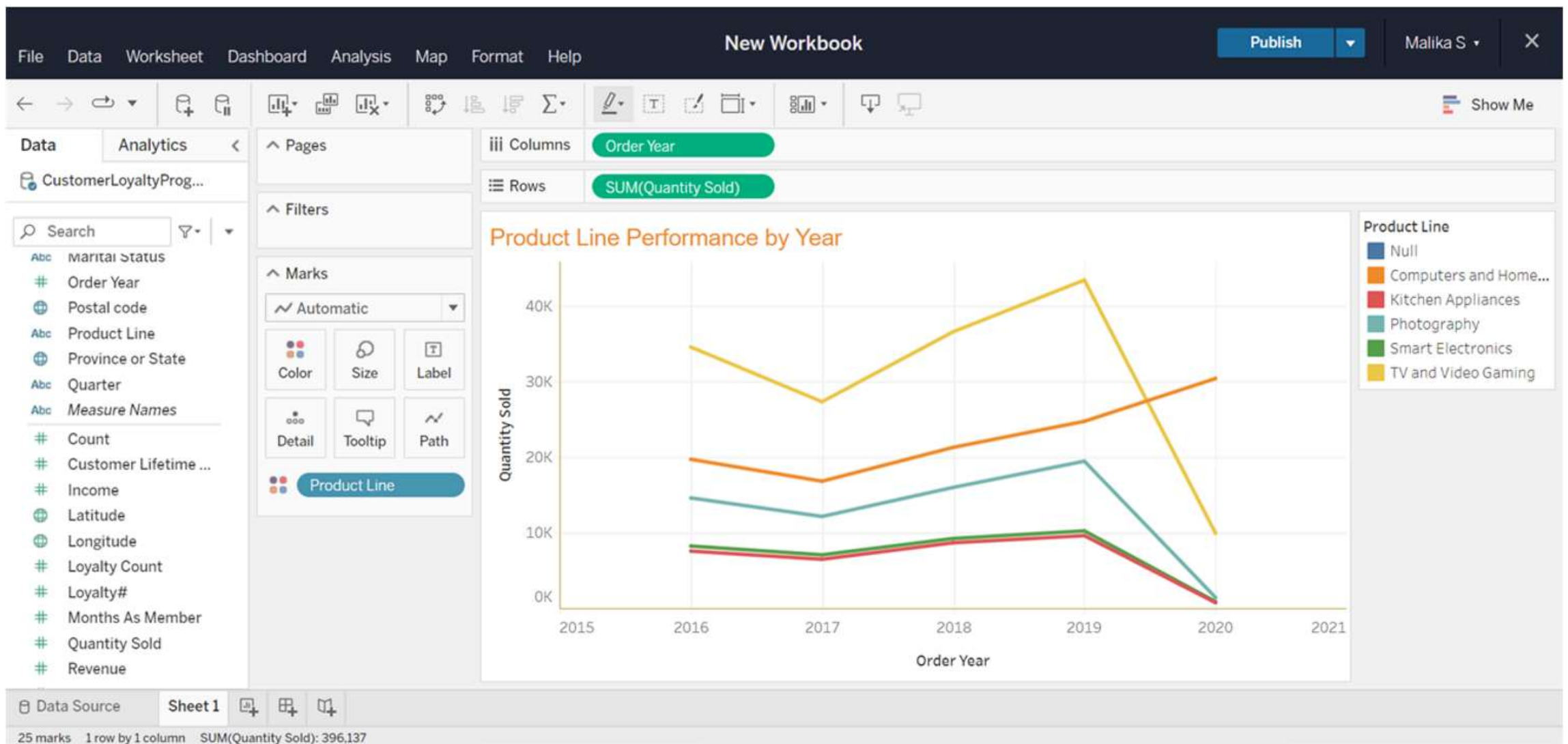
Product Line Performance by Year

Reset

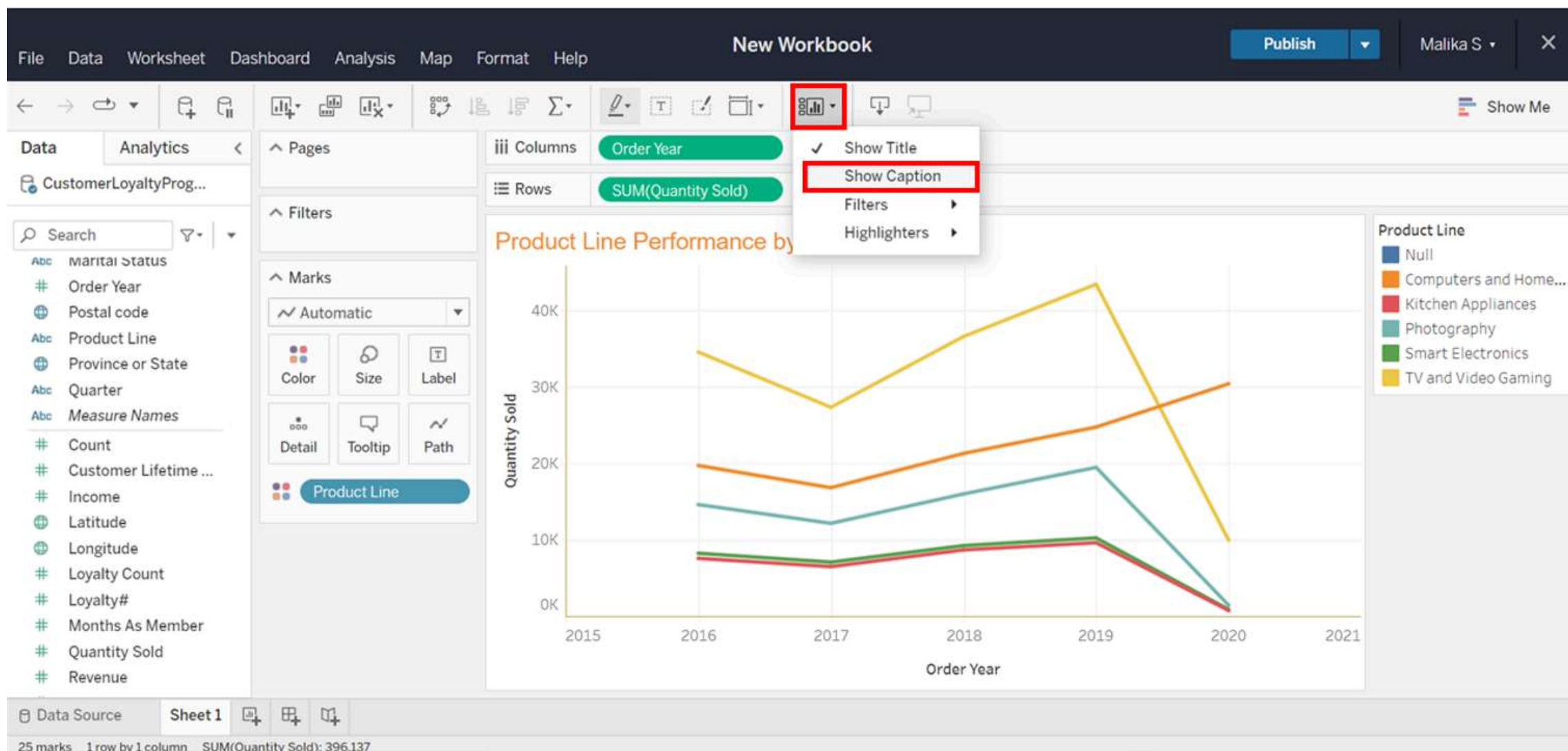
Apply

OK

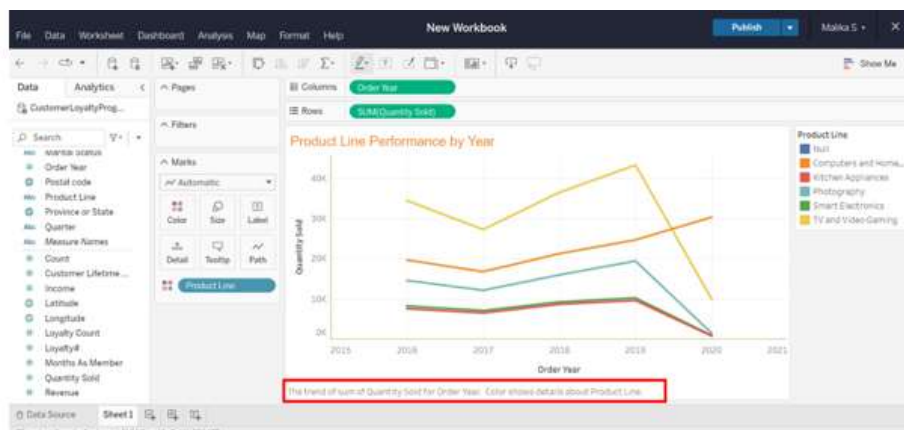
The title will appear as shown:



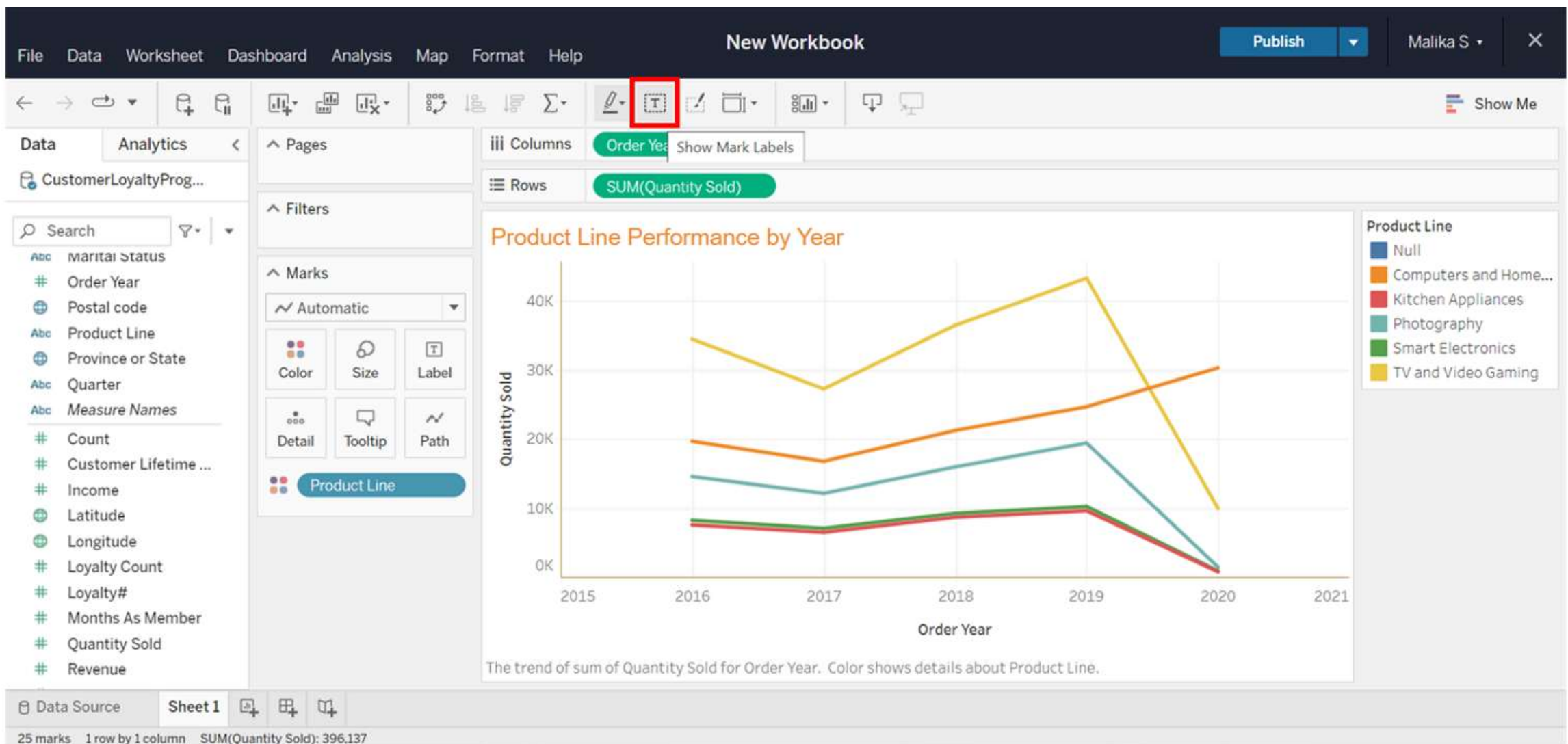
6. To add a caption, click the **Show/Hide** icon and select **Show Caption**.



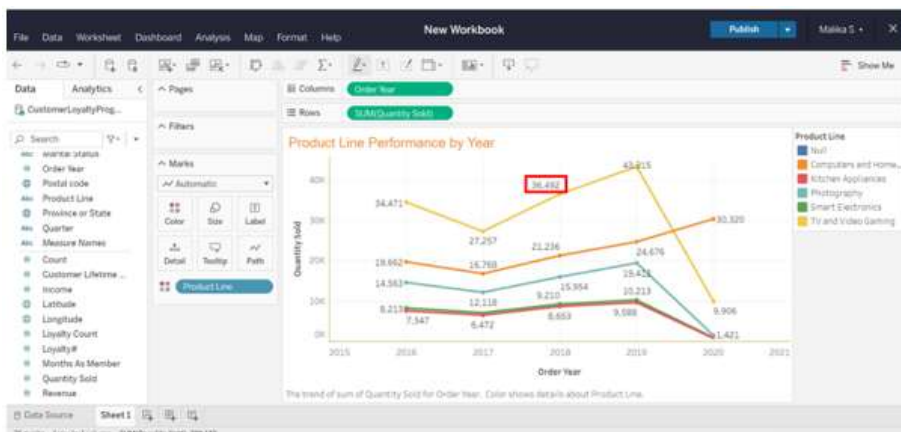
The caption will appear as shown:



7. To add labels, click the **Show Mark Labels** icon.

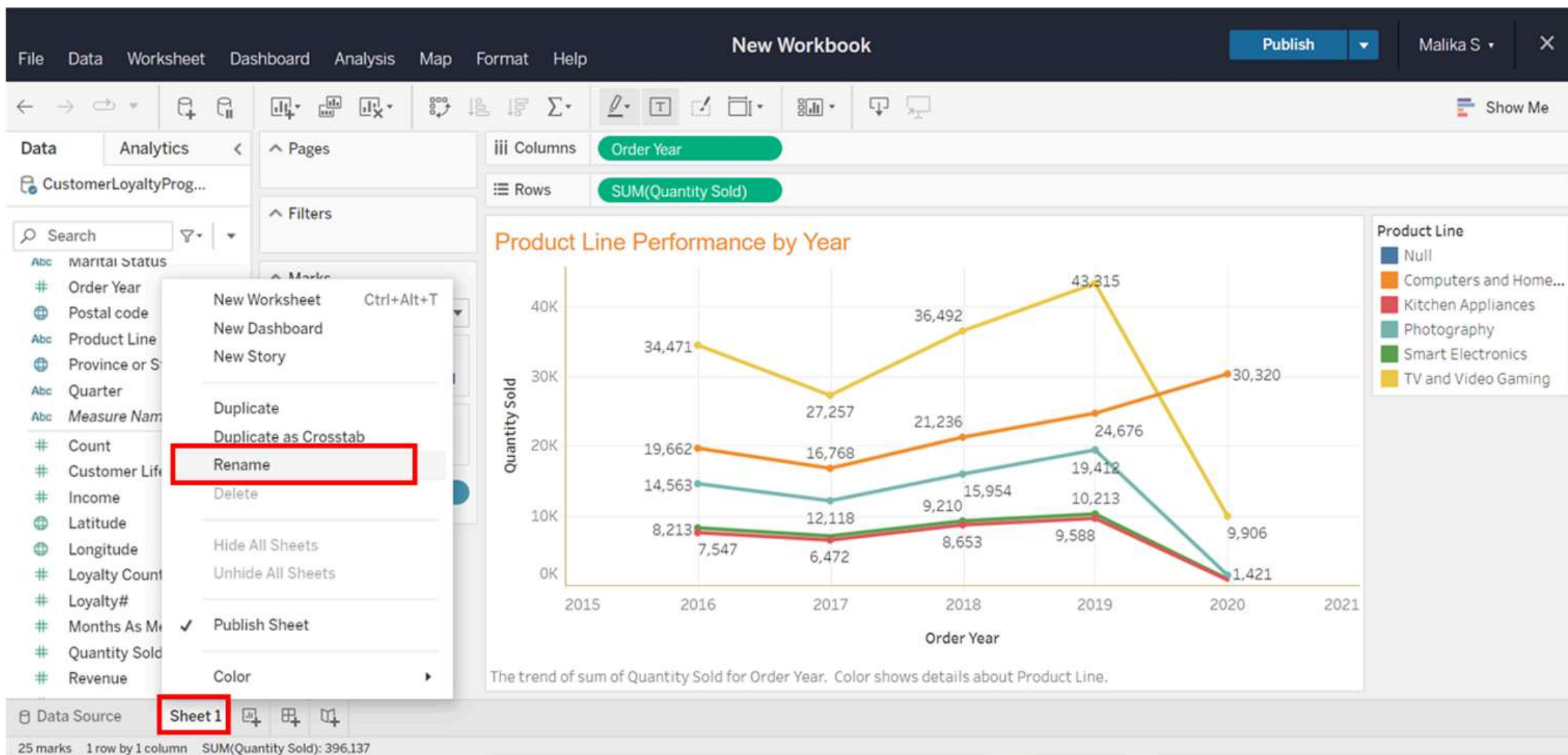


Labels will appear as shown:



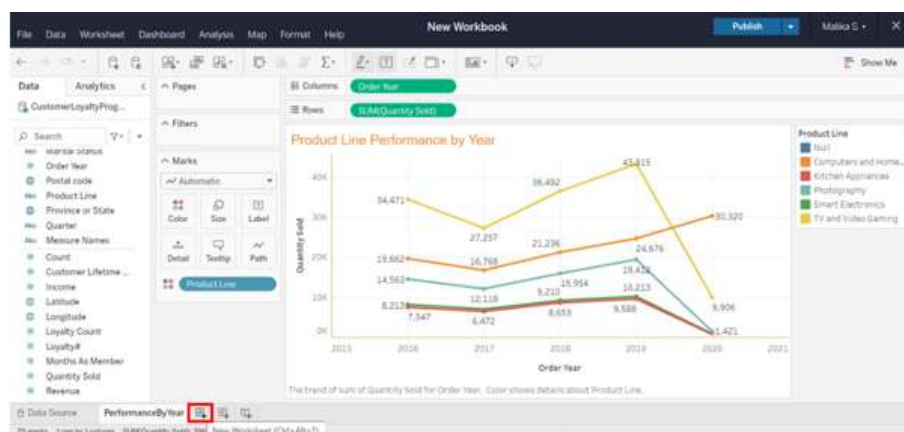
8. Rename the sheet by right clicking the sheet and selecting **Rename**. Rename this sheet **Performance By Year**.



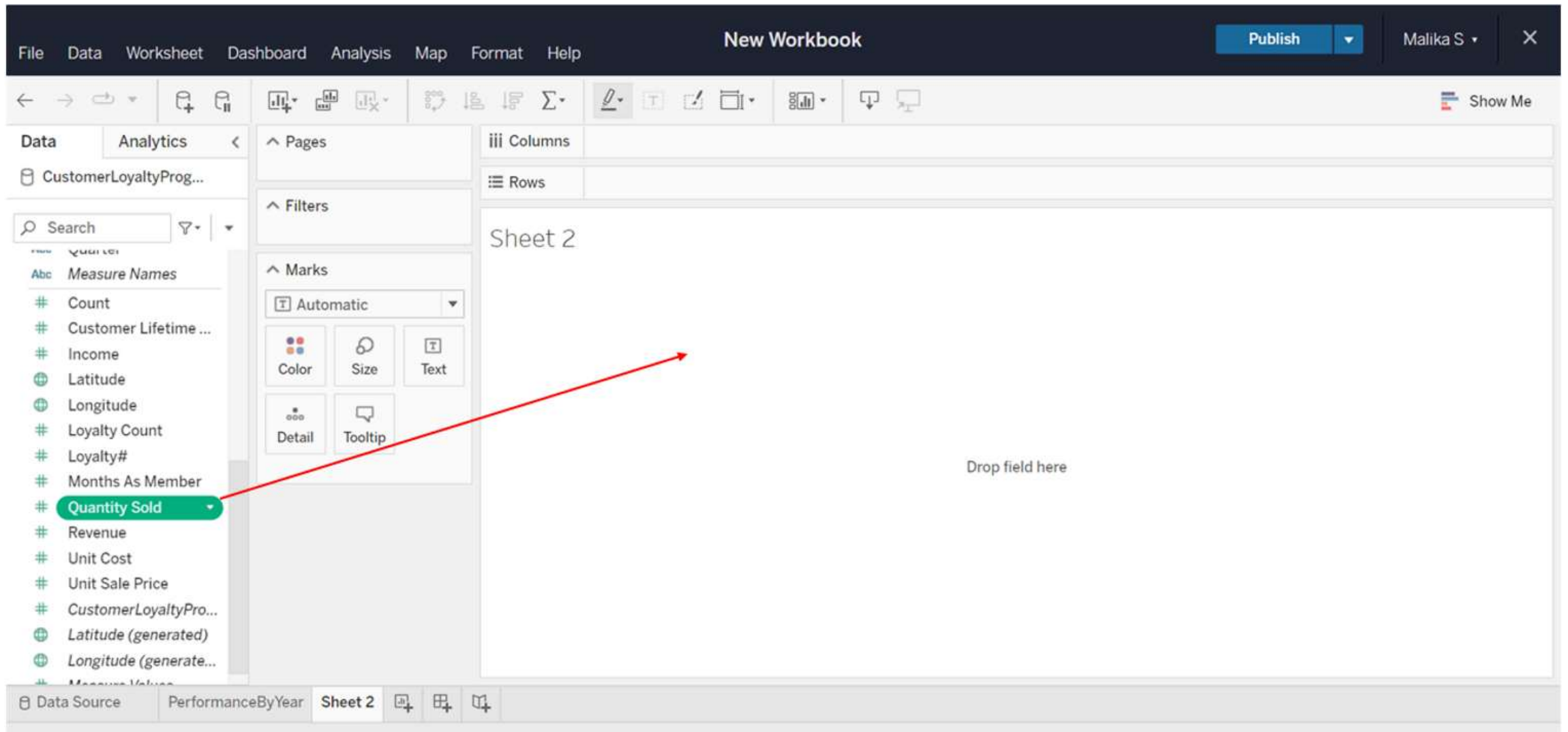


Note: You need to create more sheets to add more visualizations. Once you are done adding visualizations to all the sheets, you can then use them to create a dashboard.

9. Create a new sheet.



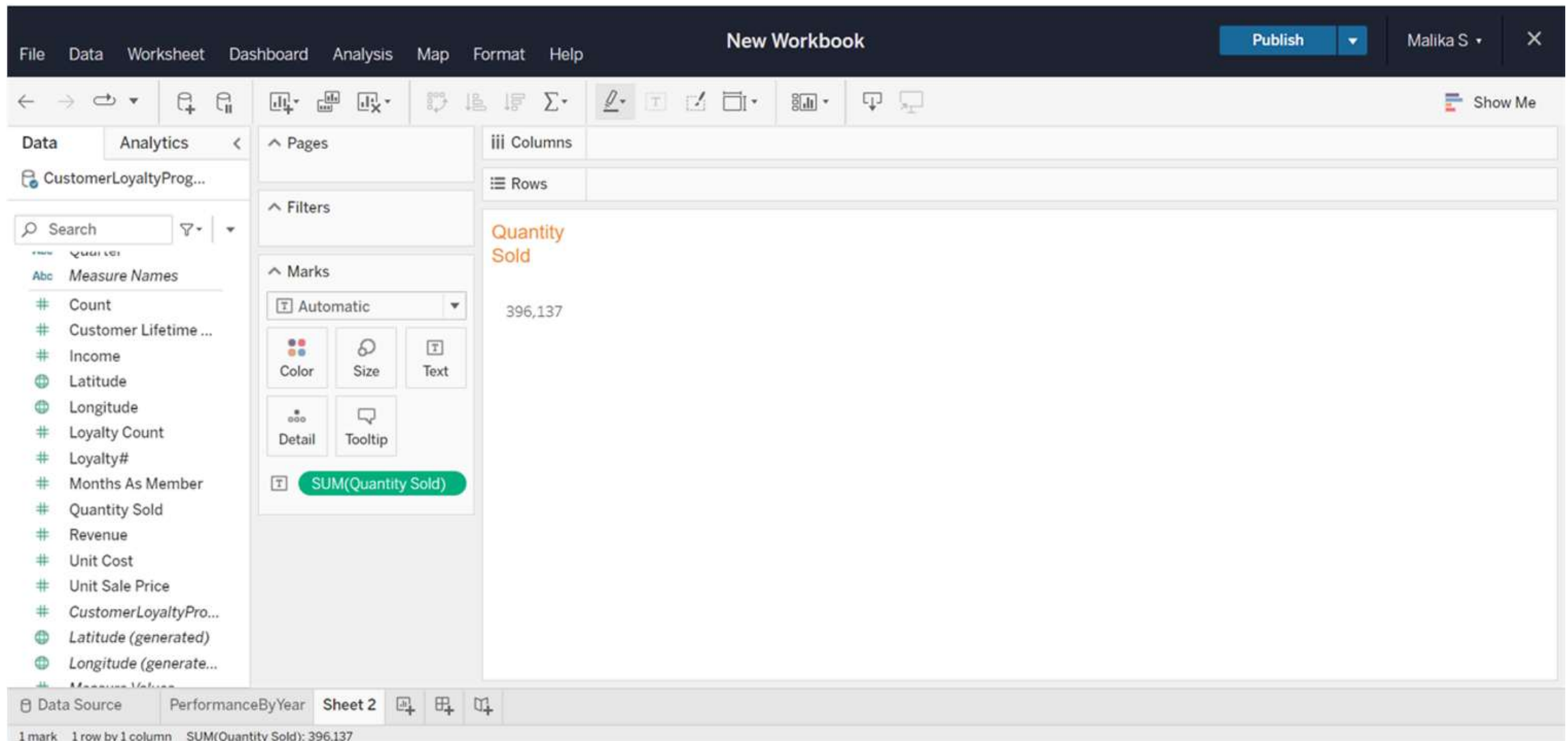
10. Drag **Quantity Sold** to the new sheet.



11. Change the **title** of **Sheet2** to **Quantity Sold**.

When you drag the **Quantity Sold** attribute, you will find that **SUM (Quantity Sold)** is the default value shown.

This is the value of the total quantity sold. The screen will appear as shown:



12. To format this attribute, hover the mouse over **SUM (Quantity Sold)**, and you will see a menu. Select **Format Number** from the menu.

The screenshot displays a software interface for creating a new workbook. At the top, a dark header bar contains the title 'New Workbook', a 'Publish' button, and a user profile 'Malika S'. Below the header, a toolbar with various icons is visible. On the left, a sidebar lists data sources and measures, including 'CustomerLoyaltyProg...', 'Measure Names', and a list of measures like 'Count', 'Customer Lifetime ...', 'Income', 'Latitude', 'Longitude', 'Loyalty Count', 'Loyalty#', 'Months As Member', 'Quantity Sold', 'Revenue', 'Unit Cost', 'Unit Sale Price', 'CustomerLoyaltyPro...', 'Latitude (generated)', and 'Longitude (generate...'. A search bar is also present. The main workspace shows a table with one row and one column, containing the value '396,137' for the measure 'SUM(Quantity Sold)'. A context menu is open over the table, with the 'Format Number...' option highlighted by a red rectangle. Other options in the menu include 'Filter...', 'Show Filter', 'Include in Tooltip', 'Dimension', 'Attribute', 'Measure', 'Discrete', 'Continuous', and 'Edit in Shelf'. The bottom status bar indicates '1 mark 1 row by 1 column SUM(Quantity Sold): 396,137'.

13. Select **Number Type** as **Currency**, **\*\*Decimal Places** as **0** and **Units** as **Thousands(K)**. Next, click anywhere outside the format panel.



Number Type

- ☐ Automatic
- ☐ Number
- ☒ Currency
- ☐ Percentage
- ☐ Scientific

Decimal Places

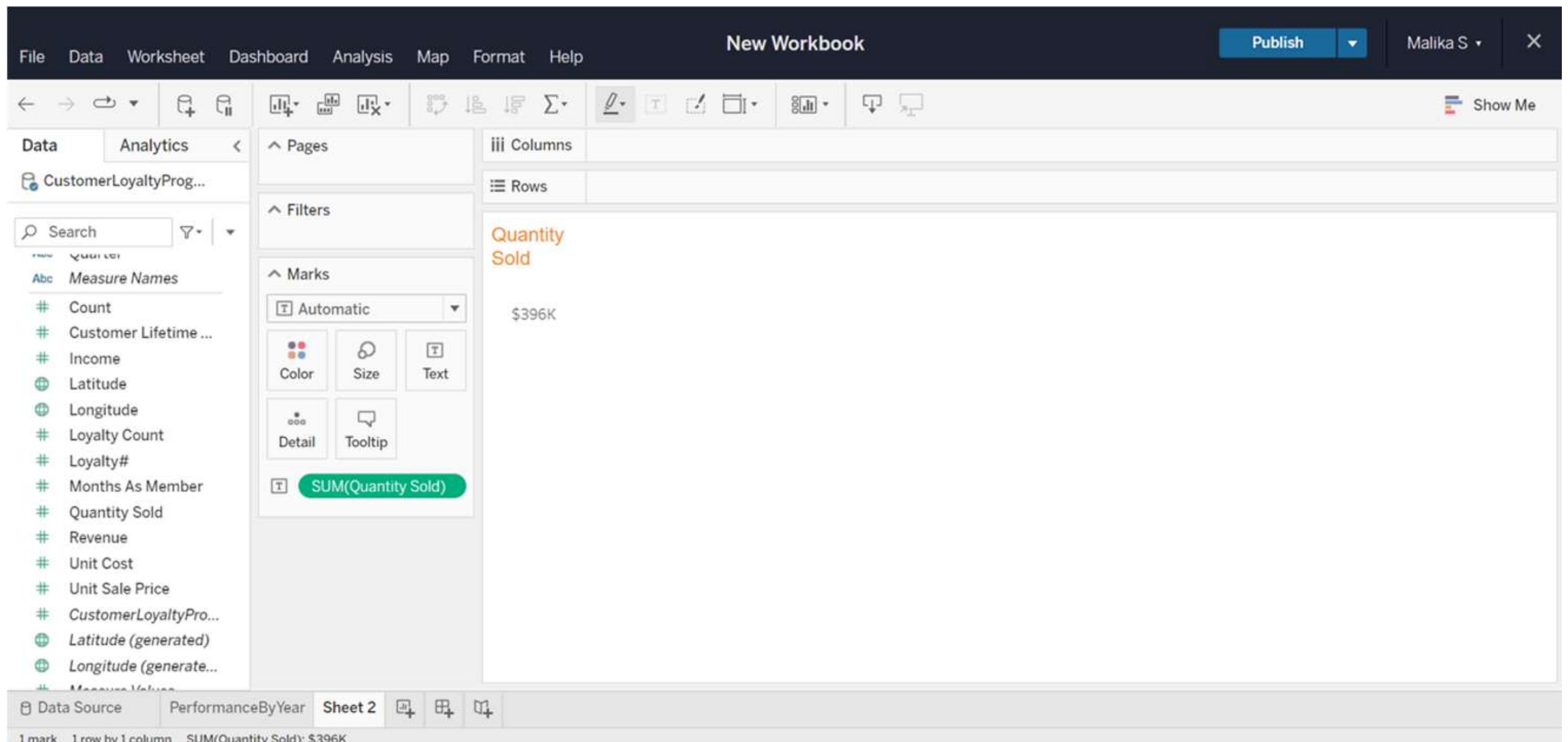
0

Units

Thousands (K) ▼

☒ Include separators

You can see the **Quantity Sold** in currency format with the value in thousands(K). The screen will appear as shown:



14. Rename Sheet2 to **Quantitiesold**.

15. Create a new sheet.

16. Drag **Revenue** to the worksheet area. You will find that **SUM (Revenue)** the value is shown. This is the value of the total revenue.

File Data Worksheet Dashboard Analysis Map Format Help New Workbook Publish Malika S X

← → ↺ ↻ ↶ ↷ ↸ ↹ ∑

Analytics CustomerLoyaltyProg...

Search

Measure Names

- Count
- Customer Lifetime ...
- Income
- Latitude
- Longitude
- Loyalty Count
- Loyalty#
- Months As Member
- Quantity Sold
- Revenue**
- Unit Cost
- Unit Sale Price
- CustomerLoyaltyPro...
- Latitude (generated)
- Longitude (generate...

Pages

Columns

Rows

Filters

Marks

Automatic

Color Size Text

Detail Tooltip

SUM(Revenue)

Sheet 3

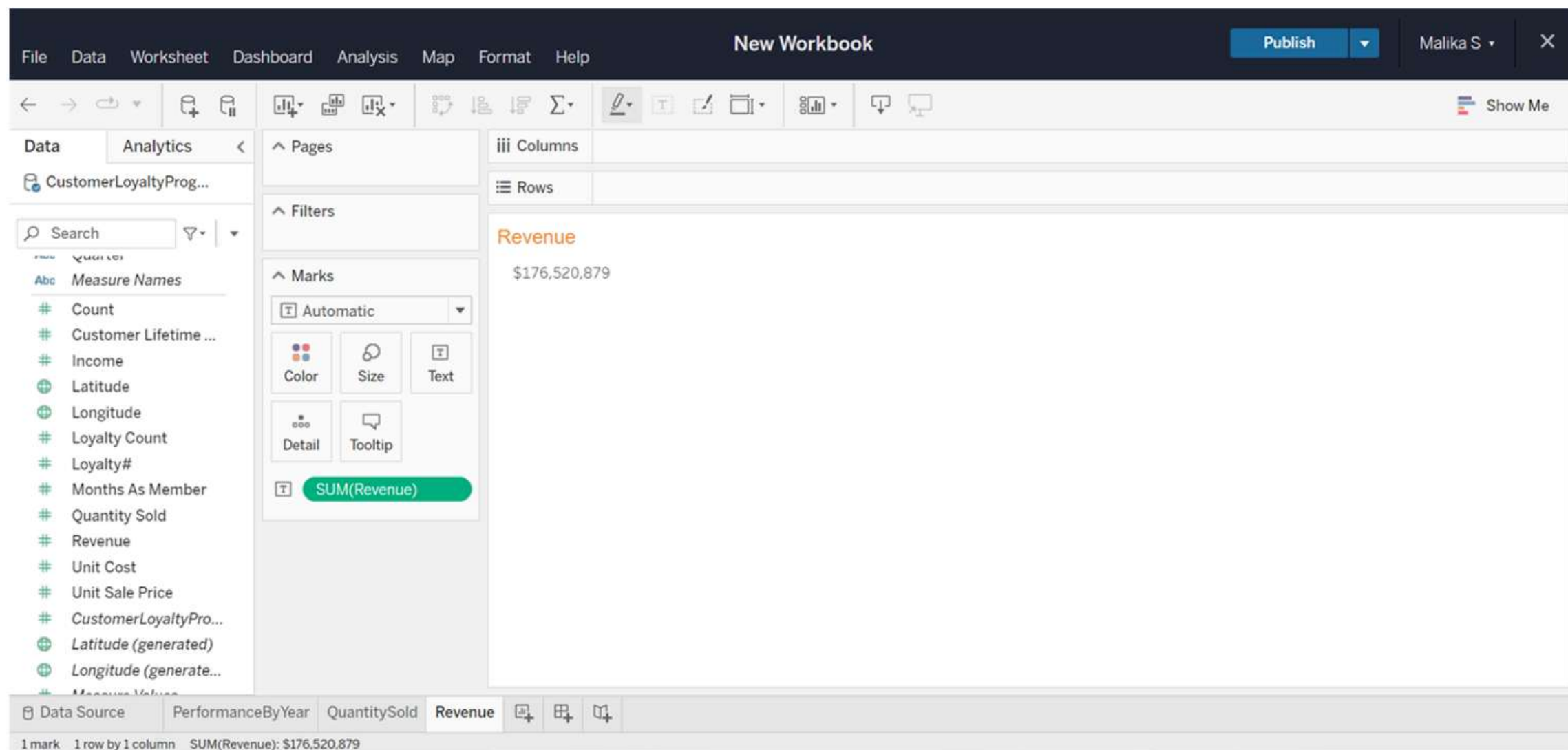
176,520,879

Data Source PerformanceByYear QuantitySold Sheet 3

1 mark 1 row by 1 column SUM(Revenue): 176,520,879

17. Change the title of Sheet3 to **Revenue**.

18. Format the displayed revenue value using the same settings as in Step 12.

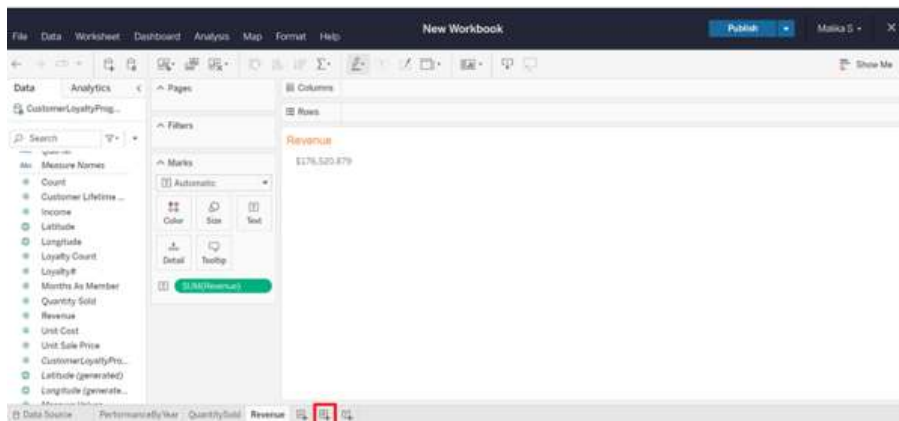


19. Rename **Sheet 3** to **Revenue**.

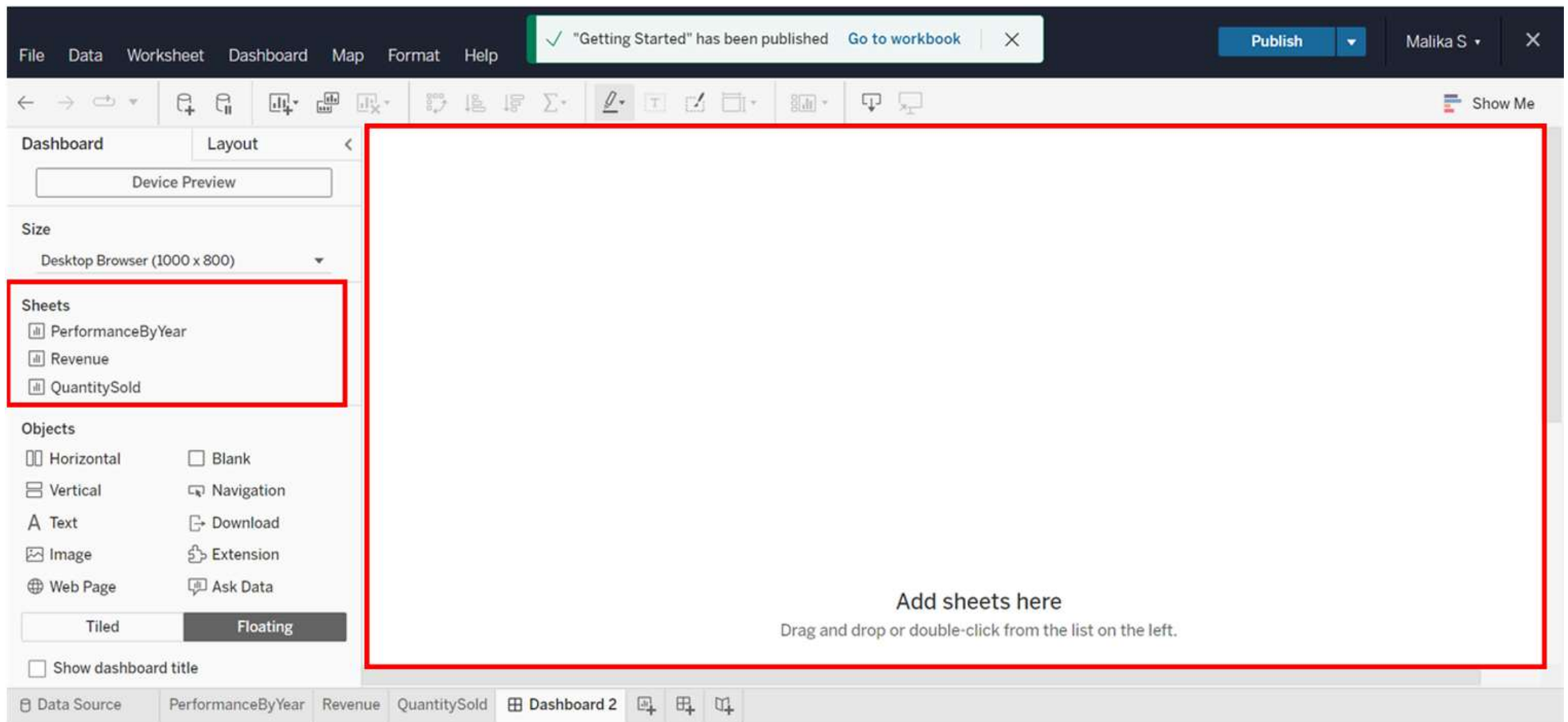
Now, you have three sheets: PerformanceByYear, QuantitySold and Revenue.

## Task C: Create a Dashboard

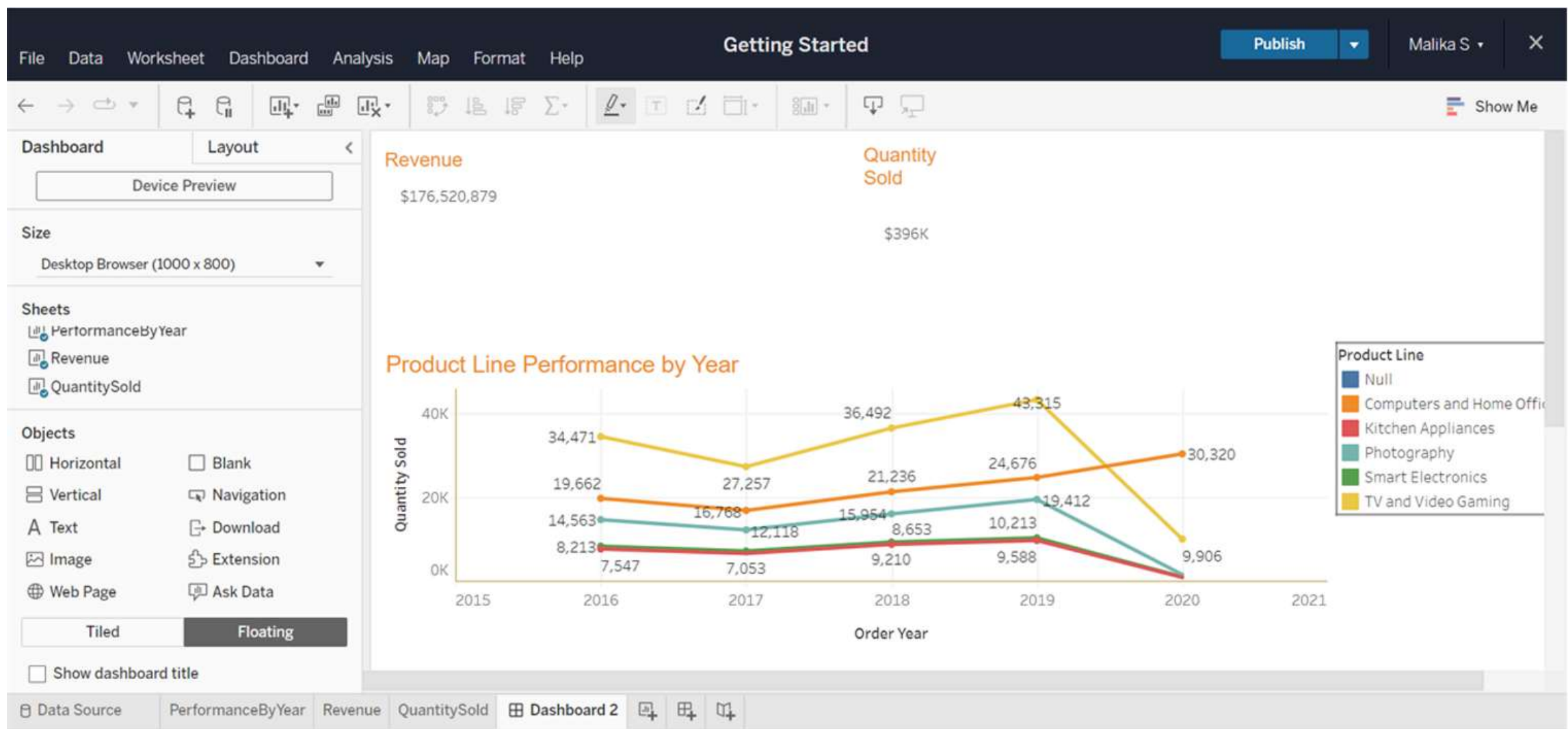
1. Click the **Create Dashboard** icon.



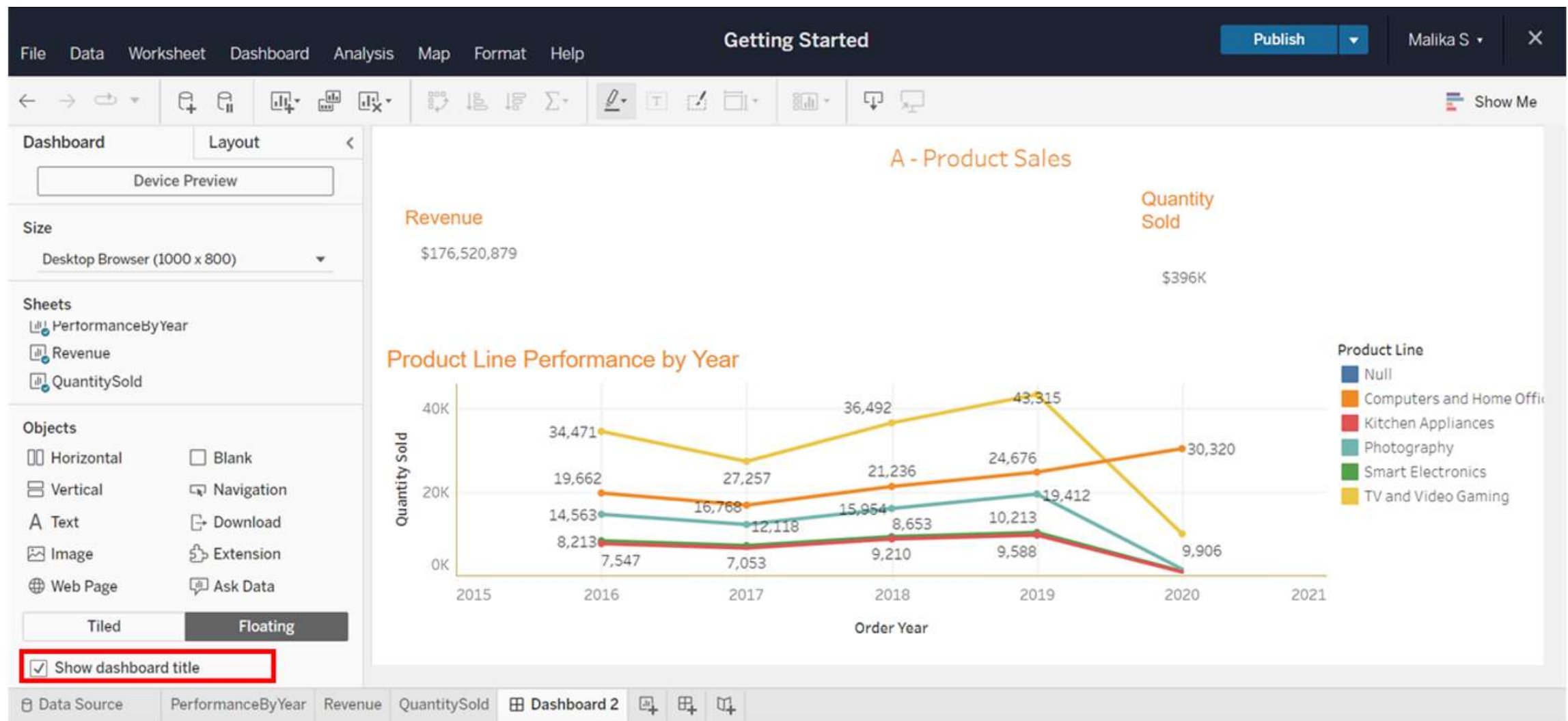
2. In the left pane, you can see the sheets you created. Drag the sheets one by one to the dashboard area to create the dashboard.



3. The dashboard will appear as shown:

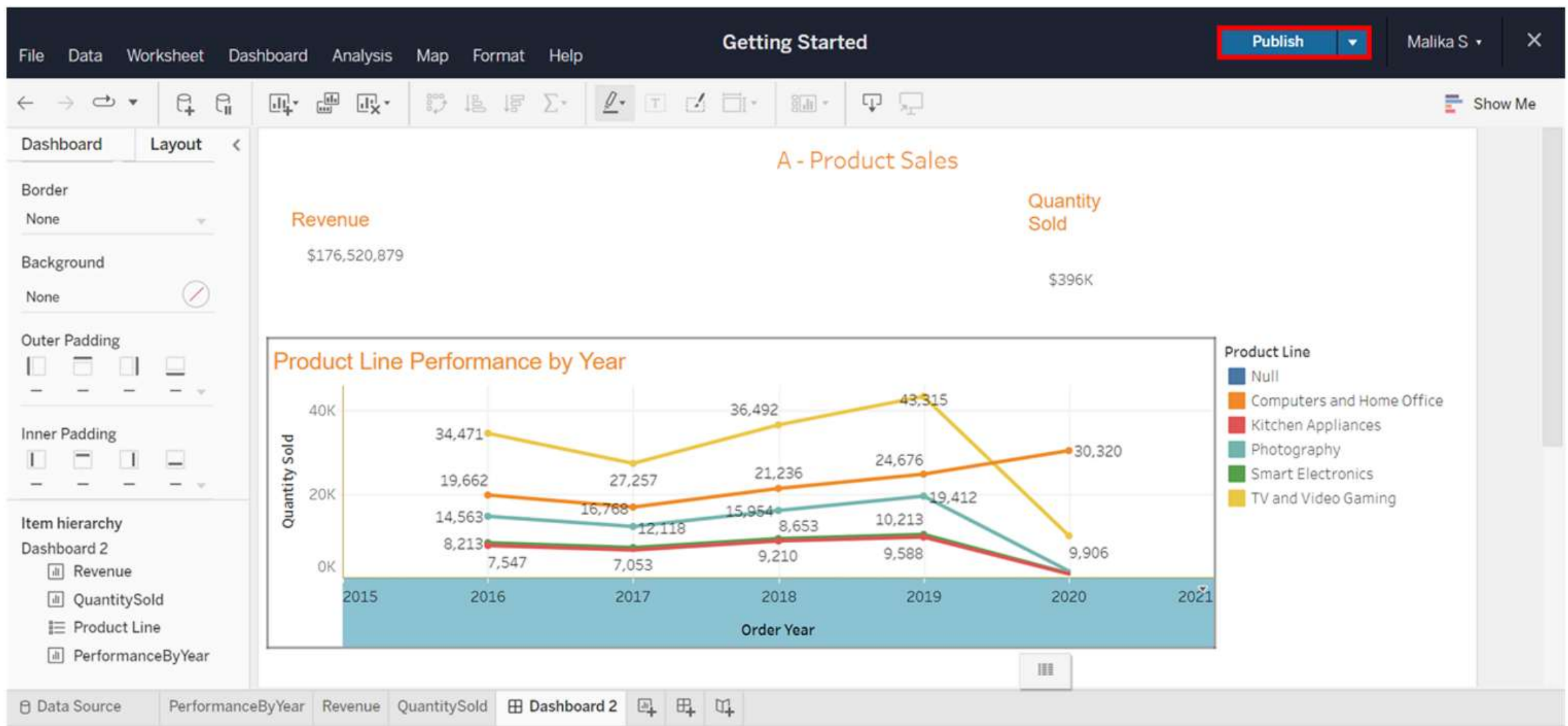


4. You can now add or modify the title of the dashboard. Click **Show dashboard title** and rename the title to **A - Product Sales**.



5. Click **Publish** and select the personal space to save your workbook.





6. Enter workbook **name** and click **Publish**. You can add a password to your workbook as well.



Publish Workbook

×

Name

Getting Started

Location

Personal Space (Private to me)


▼ Projects

default

Samples

☐ Show sheets as tabs

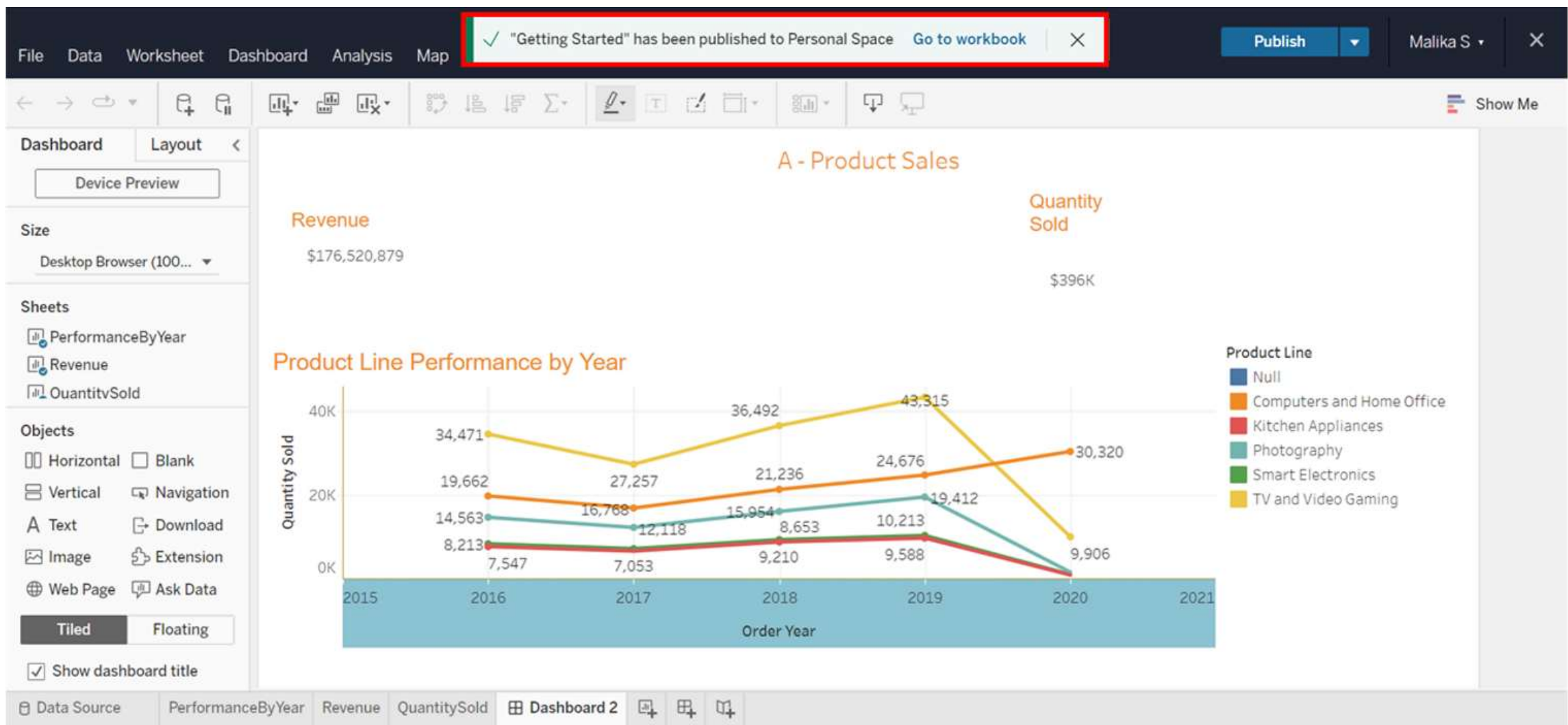
☐ Embed password for data source

 Workbook Optimizer

Cancel

Publish

7. Once published, you will see the publication confirmation message.



8. In **Personal Space**, you see the dashboard(s) and any content that you have saved. From here, you can add dashboards to **Favorites** or in **Collections** by clicking the three dots.

Home

Favorites

Recents

Shared with Me

Recommendations

**Personal Space**

Collections

Explore

External Assets

Users

Groups

You have **12** days left in your trial. [BUY NOW](#)

?

🔔

MS

Personal Space

Your private space to create new content and explore.

New ▾

Select All

Sort By: Views (all-time) ▾

🔍

Product Line Performance by Year

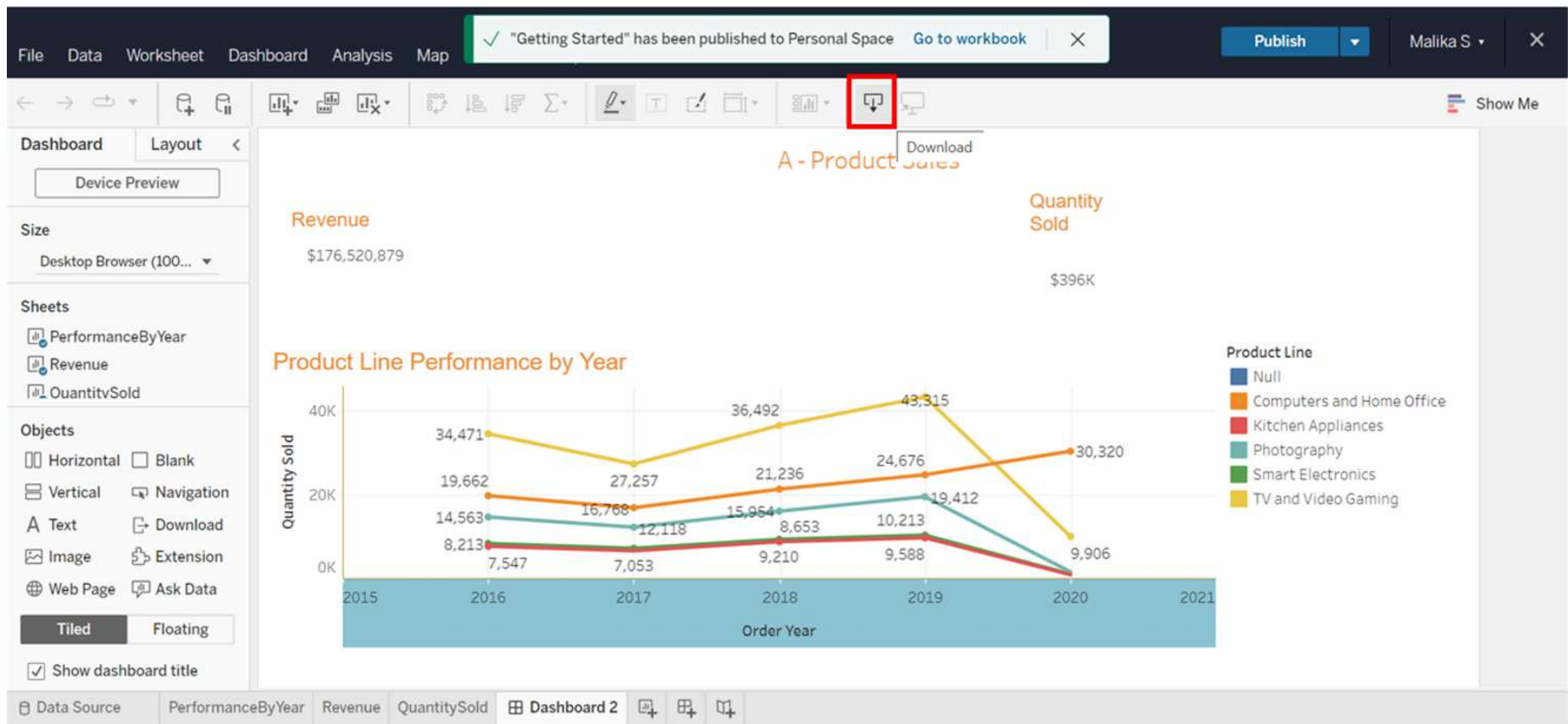
Getting Started

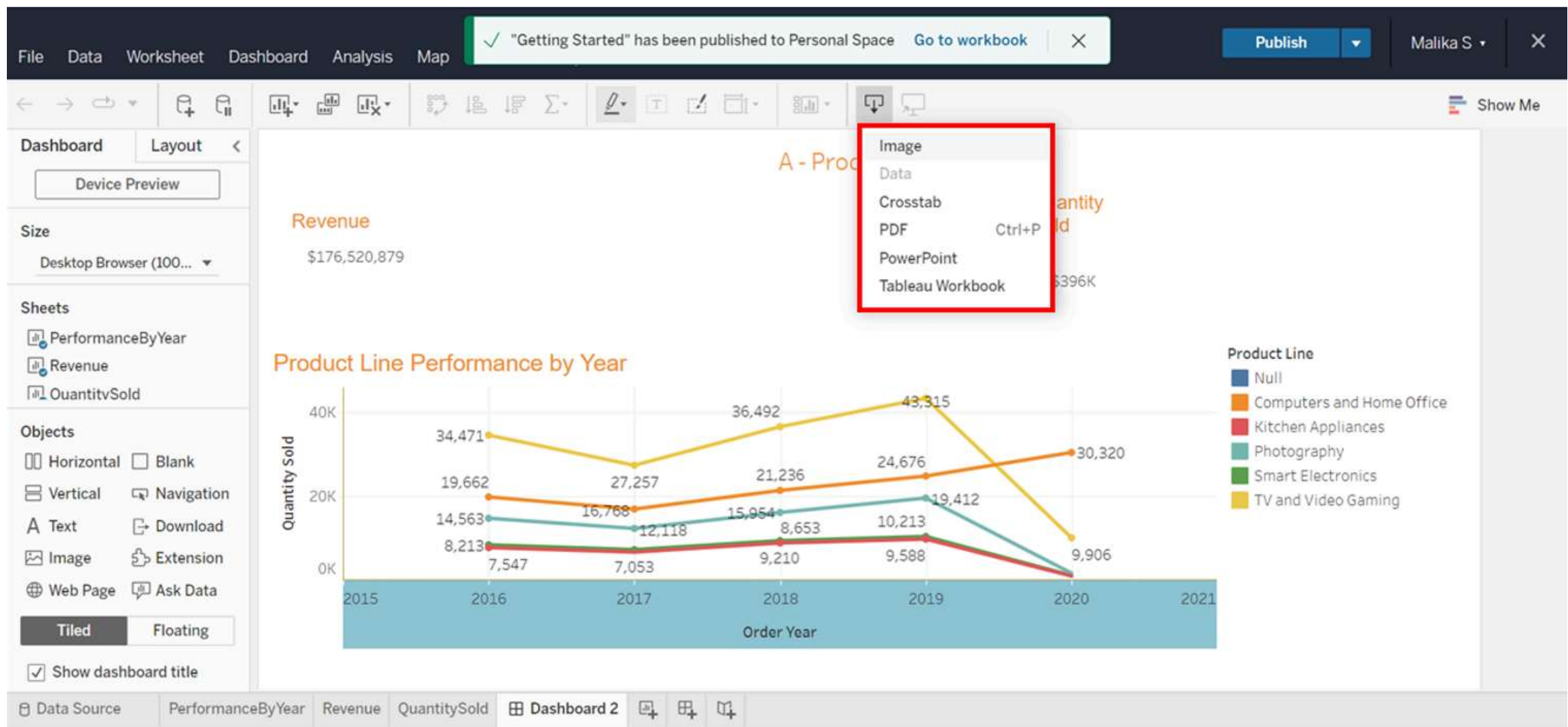
☆

⋮

Show hidden icons

9. Click the **Download** icon to download your dashboard in different formats like **image**, **PowerPoint**, **PDF**, and so on.





Note: When starting a new **task or visualization**, create a new worksheet.

**Congratulations! You have completed the lab and ready for the next topic.**

## Author(s)

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## Other Contributor(s)

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## Change Log

Date (YYYY-MM-DD)	Version	Changed By	Change Description
2023-05-10	0.5	Eric Hao & Vladislav Boyko	Updated Page Frames
2022-05-13	0.1	Malika, Duvvana	Created Initial Version
2022-07-01	0.2	Arpita Esther Herbert	ID Review
2022-07-18	0.3	Beth Larsen	QA review
2023-05-04	0.4	Rahul Jaideep	Updated Markdown file