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**.

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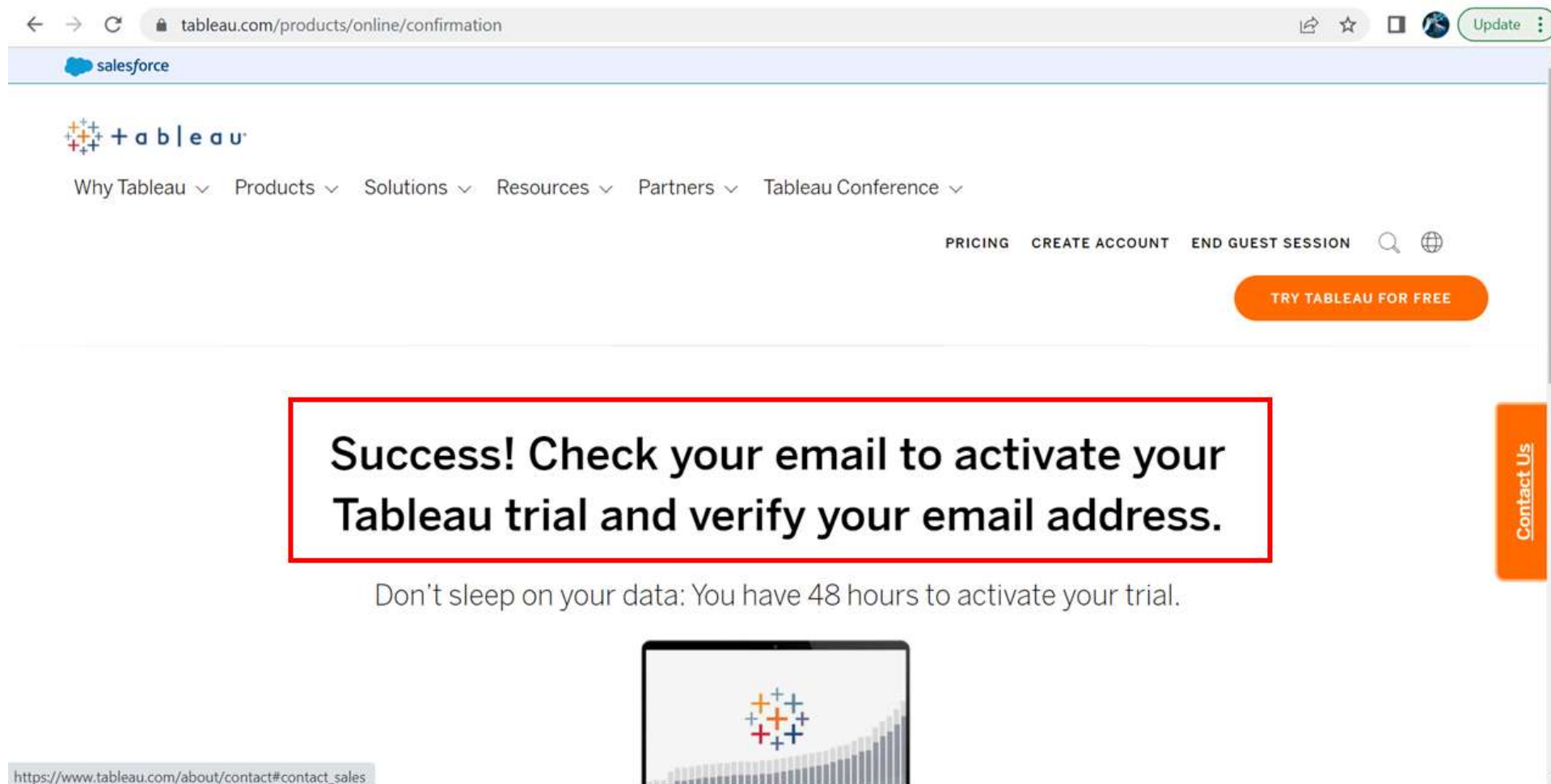
3. Verify your email by clicking on **Activate account**.

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.

6. You will be redirected to the Tableau page.

   Note: Your Tableau Online 14-day trial begins the day your account is activated.
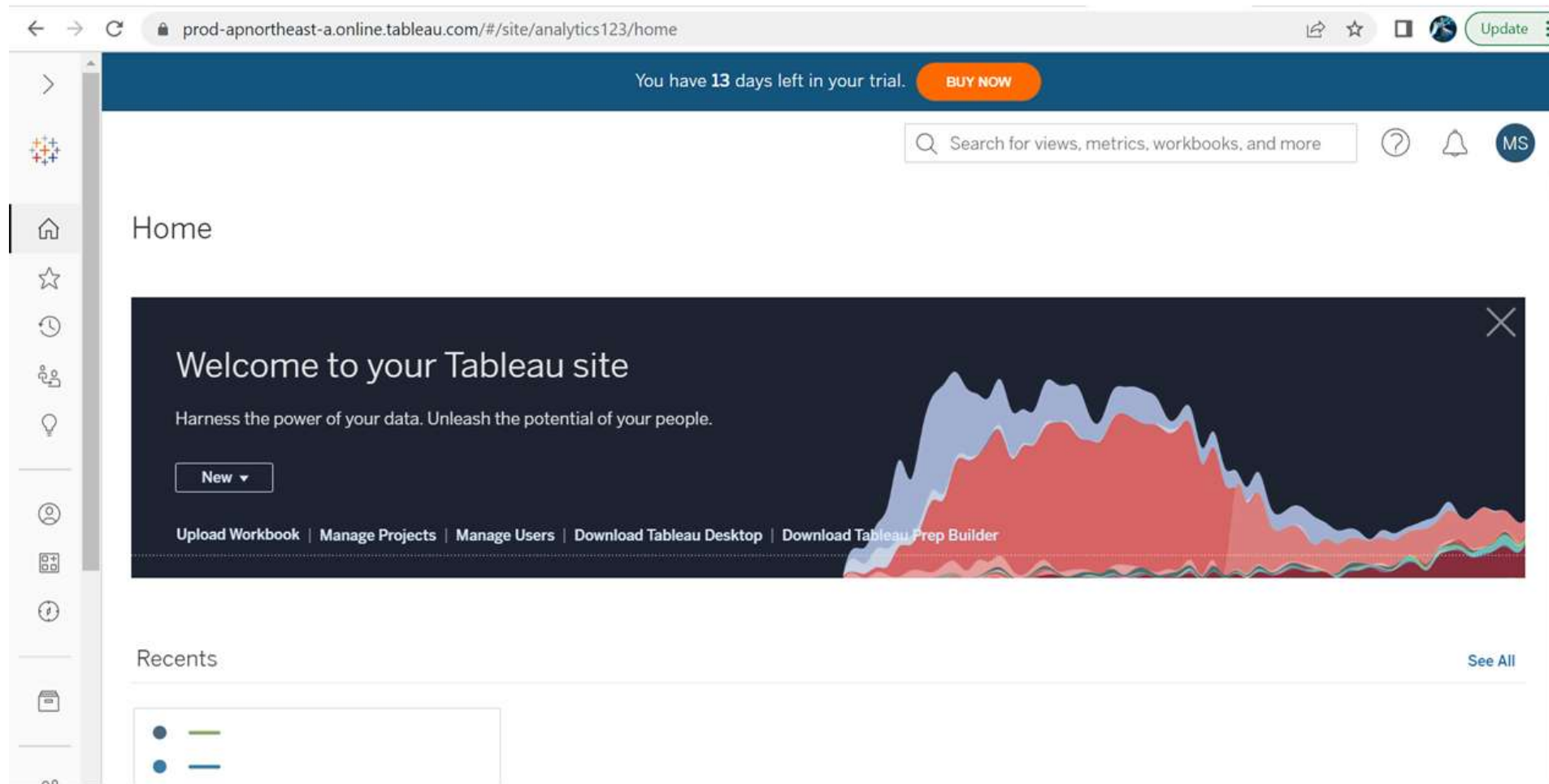
Exercise 2: Navigate Tableau Online UI

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.

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

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

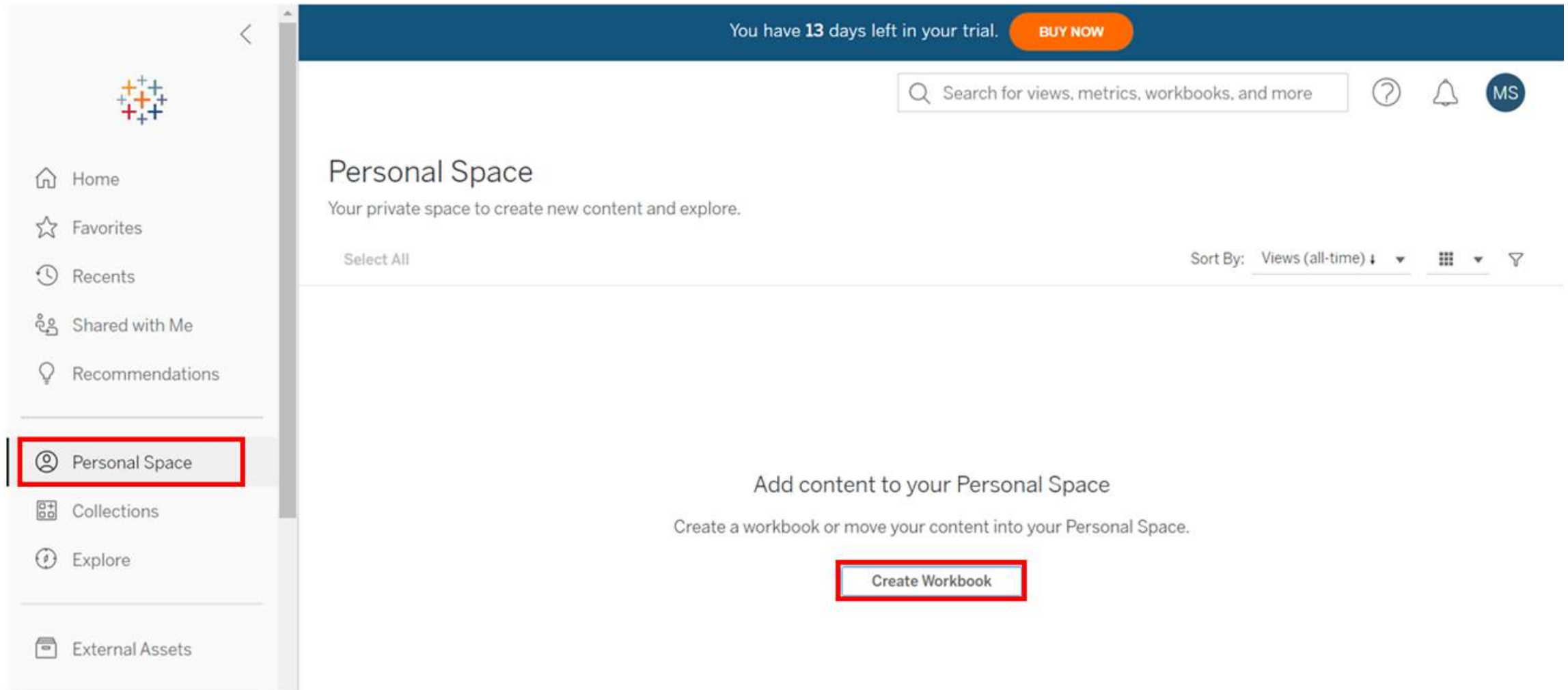In this task, you will learn how to upload external data files to Tableau.

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.

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

Explore the workbook area for creating visualizations.

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.
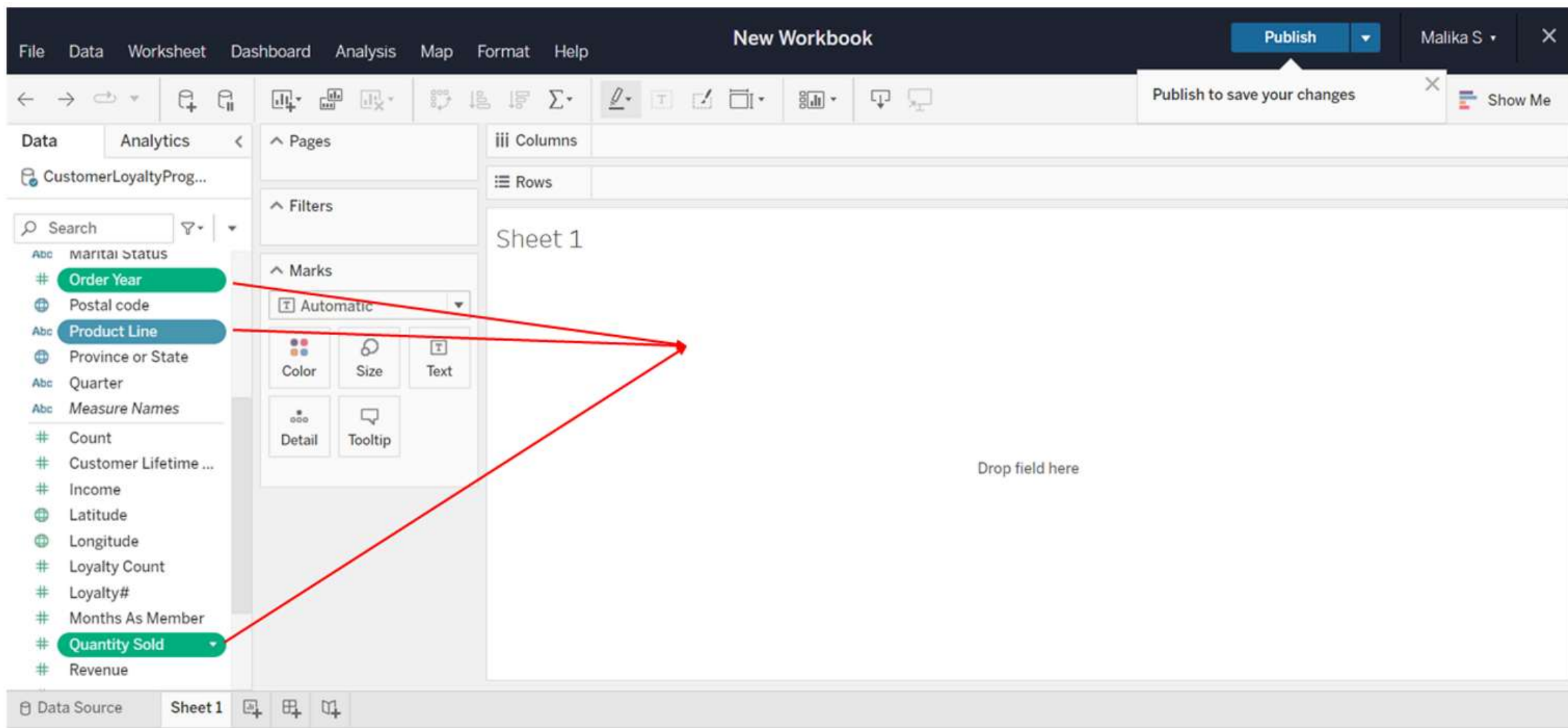
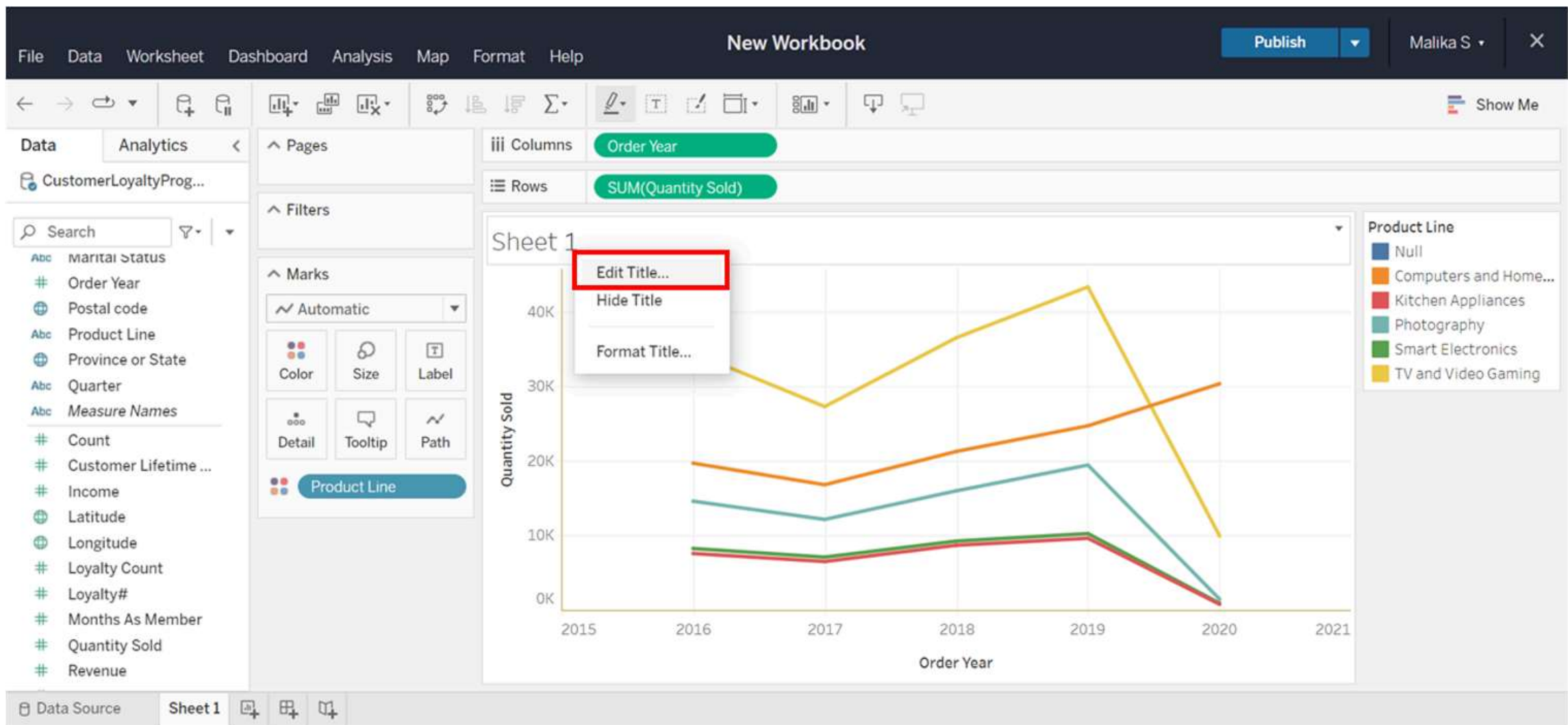2. Data will appear as shown:
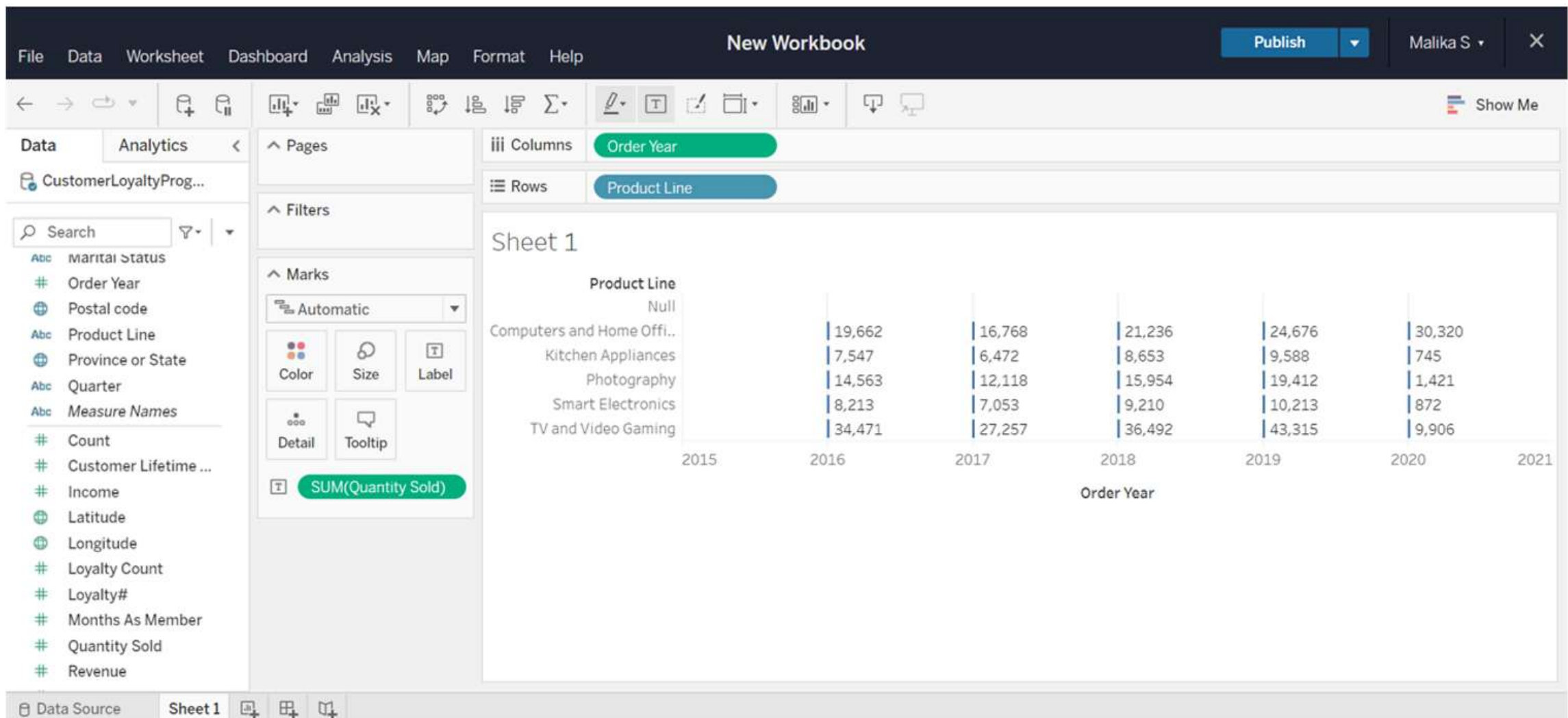
3. Click **Show me** and select the **line plot** icon to create a line plot visualization.

4. Right-click the **Title** and select **Edit Title**.

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

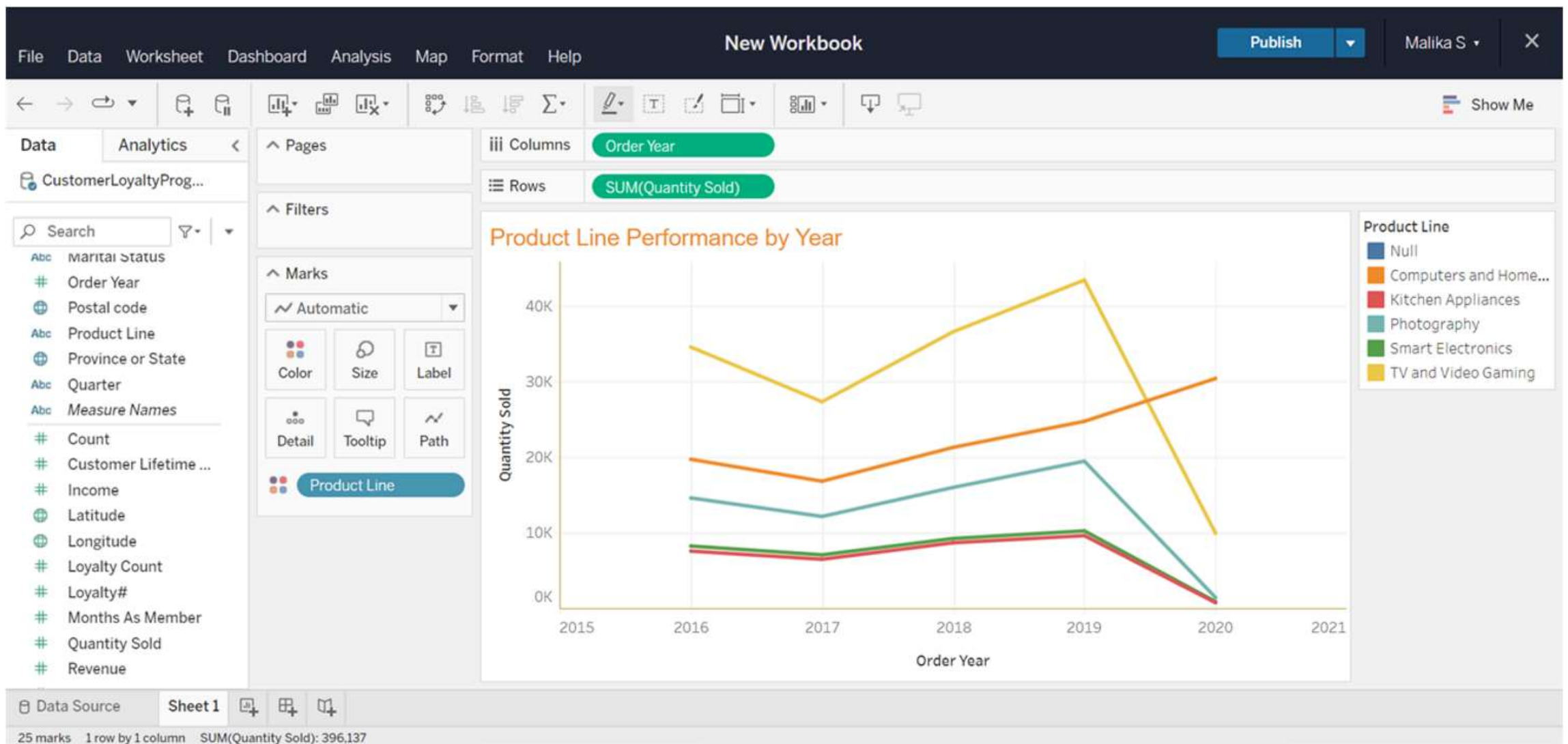| Arial ▼ | 14 ▼ | B | I | U | [orange] ▼ | ≣ | ≣ | ≣ | Insert ▼ | Clear Formatting |

Product Line Performance by Year
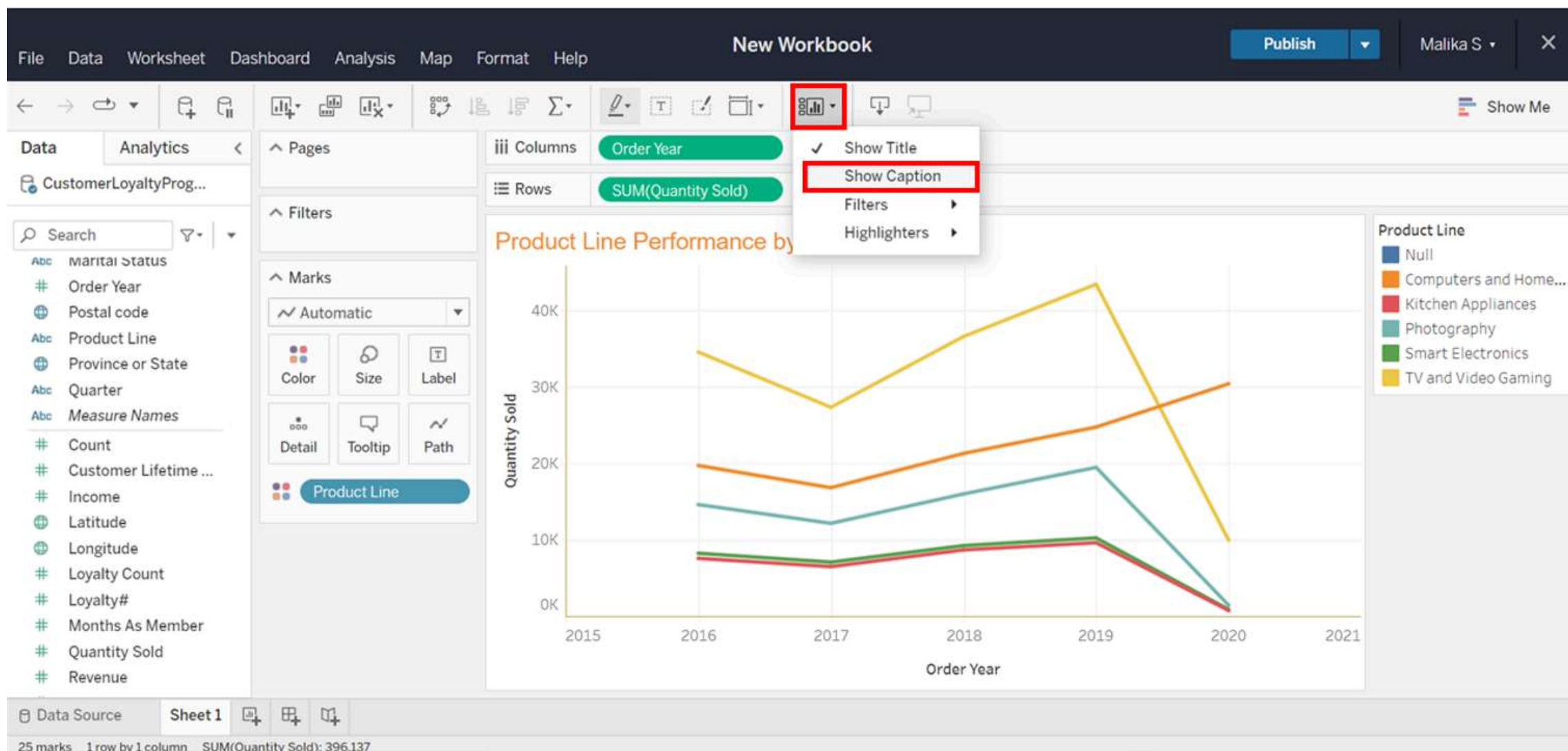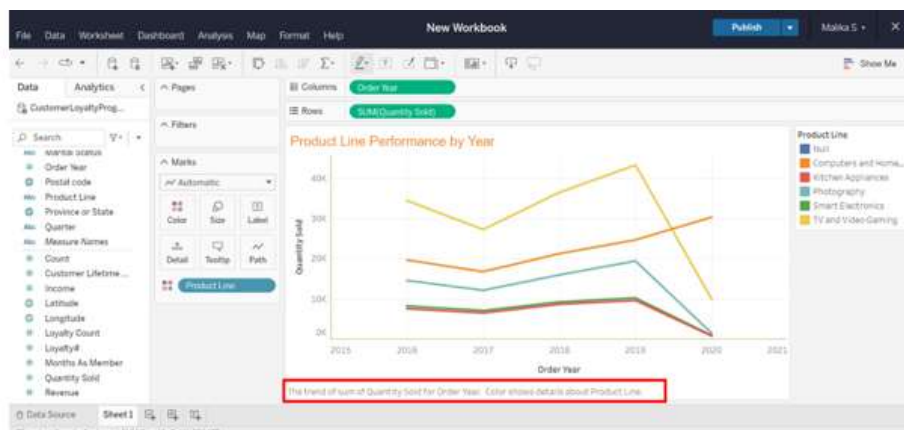
Reset   Apply   OK
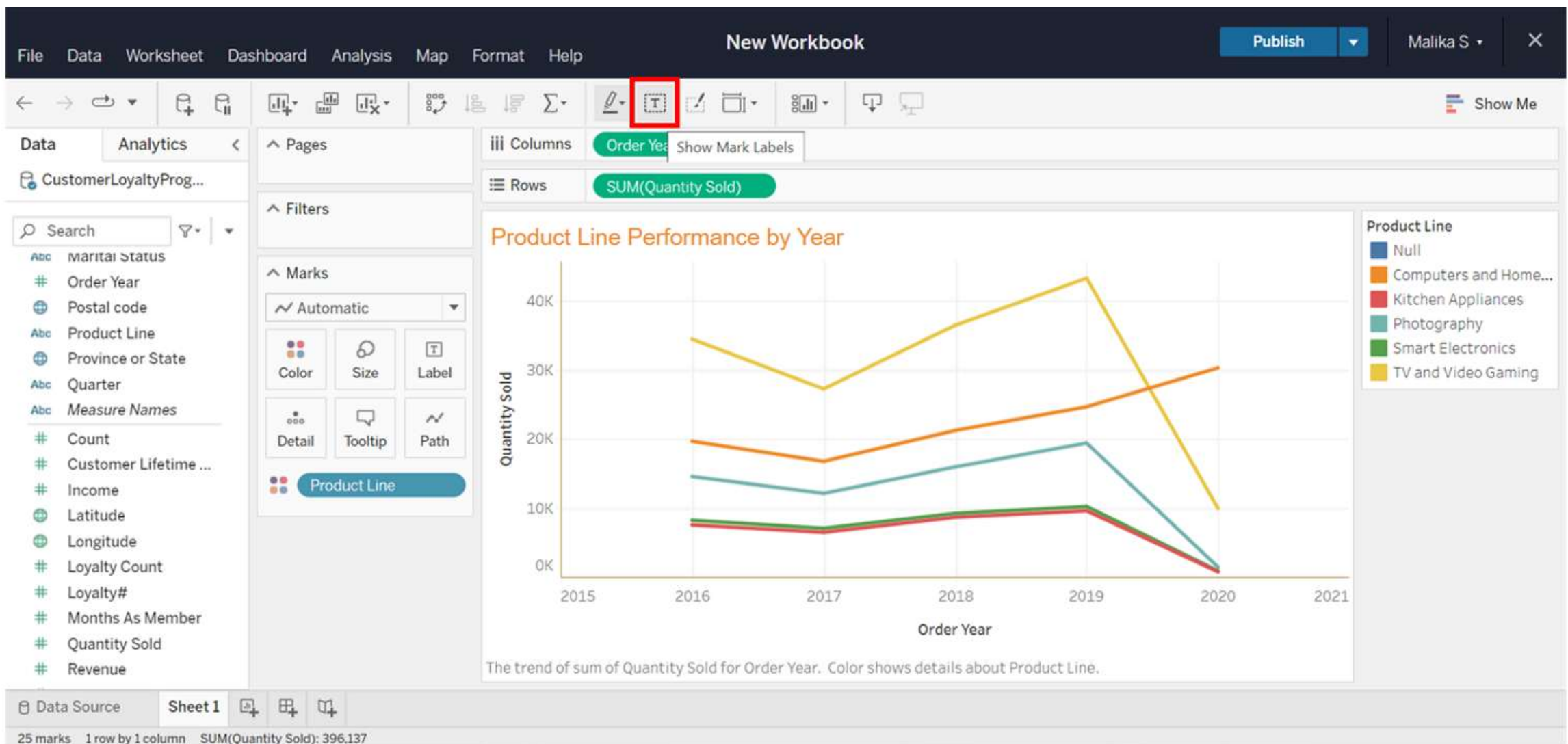
The title will appear as shown:

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

The caption will appear as shown:

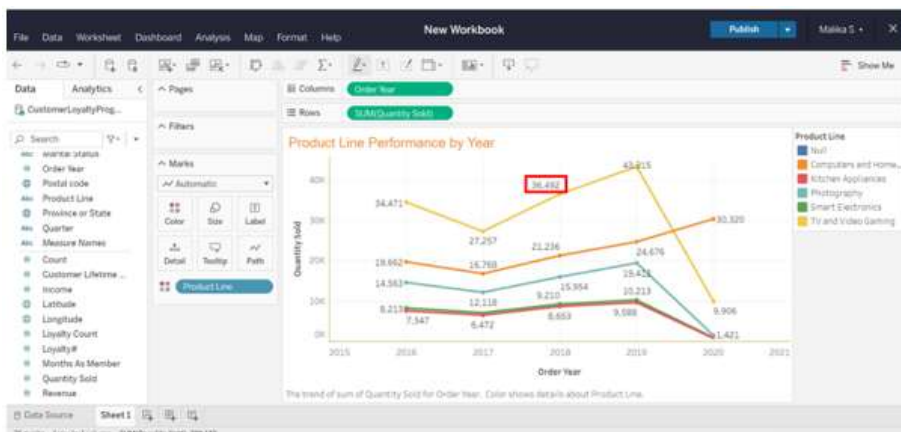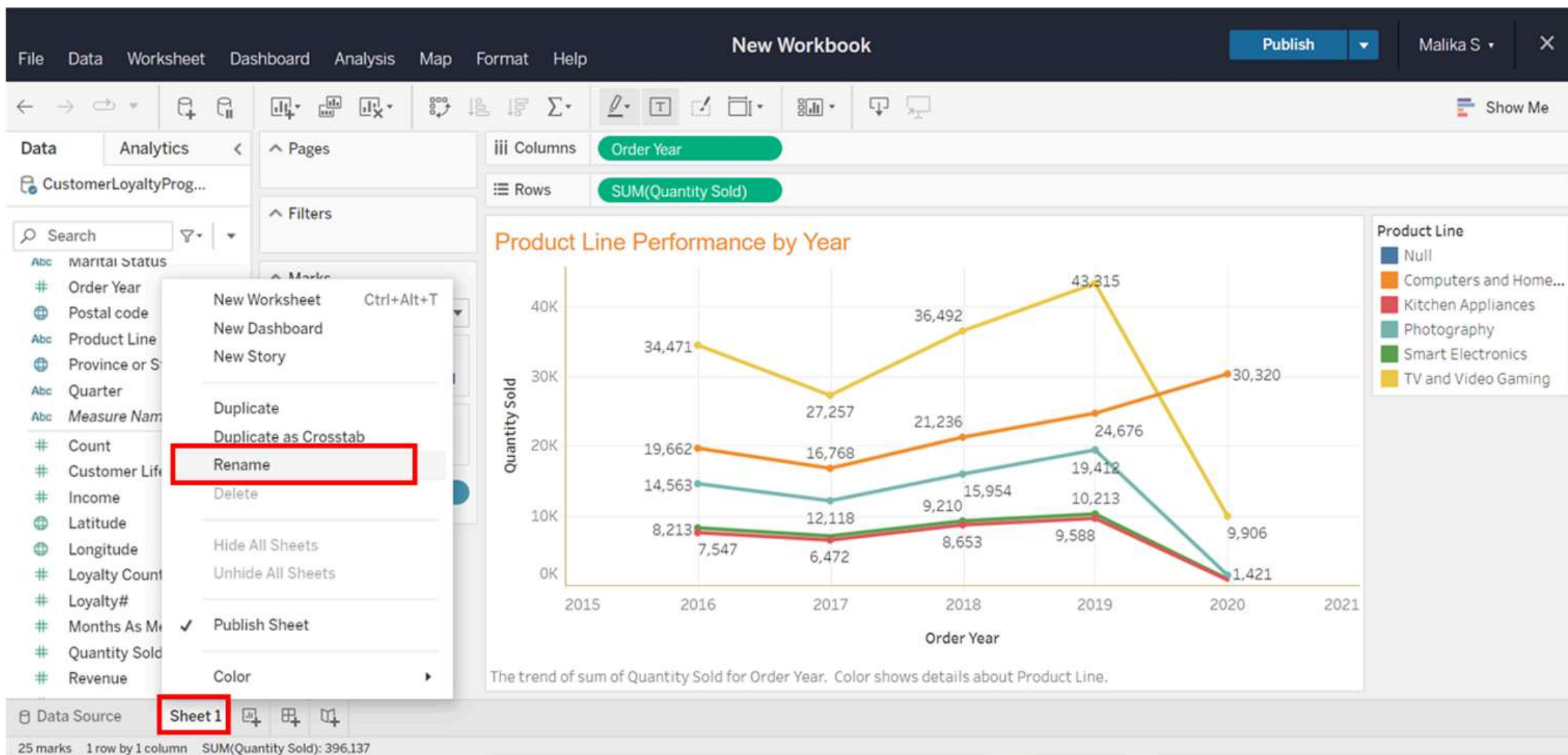7. To add labels, click the **Show Mark Labels** icon.
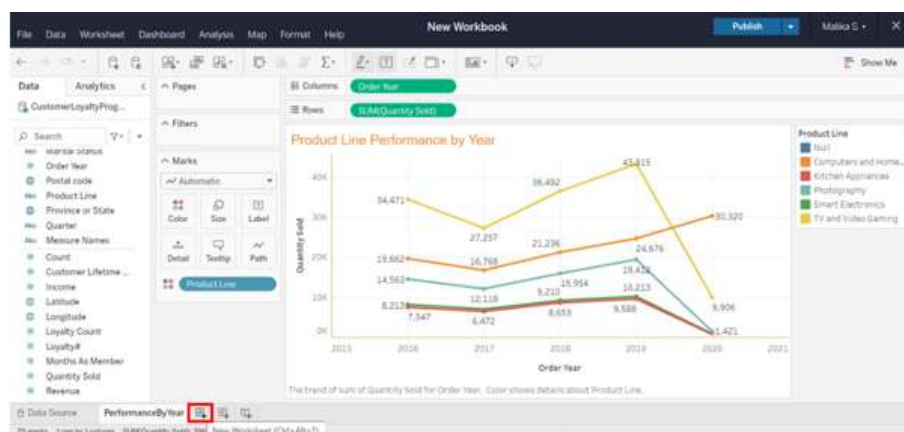
Labels will appear as shown:

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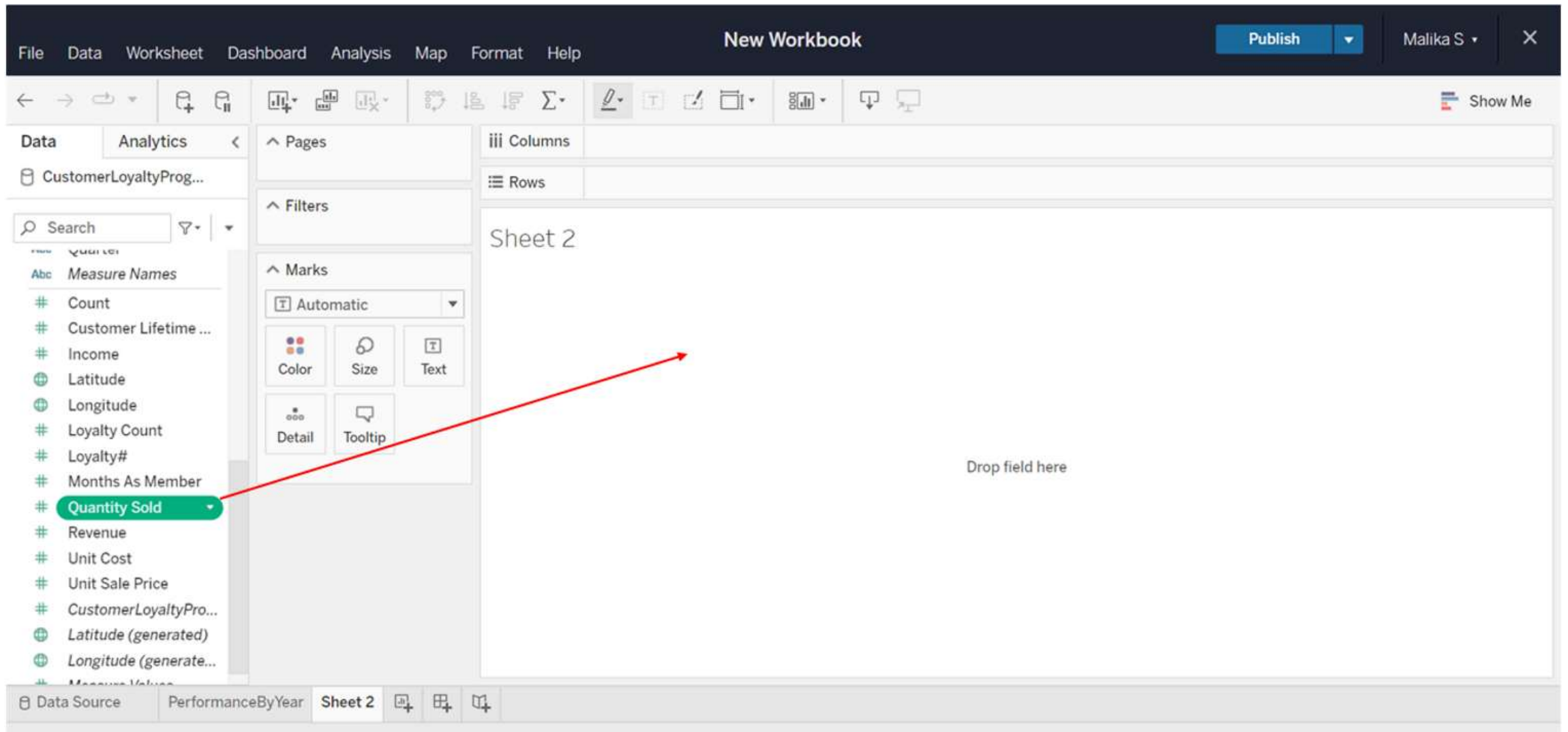
11. Change the **title** of **Sheet2** to **Quantity Sold**.

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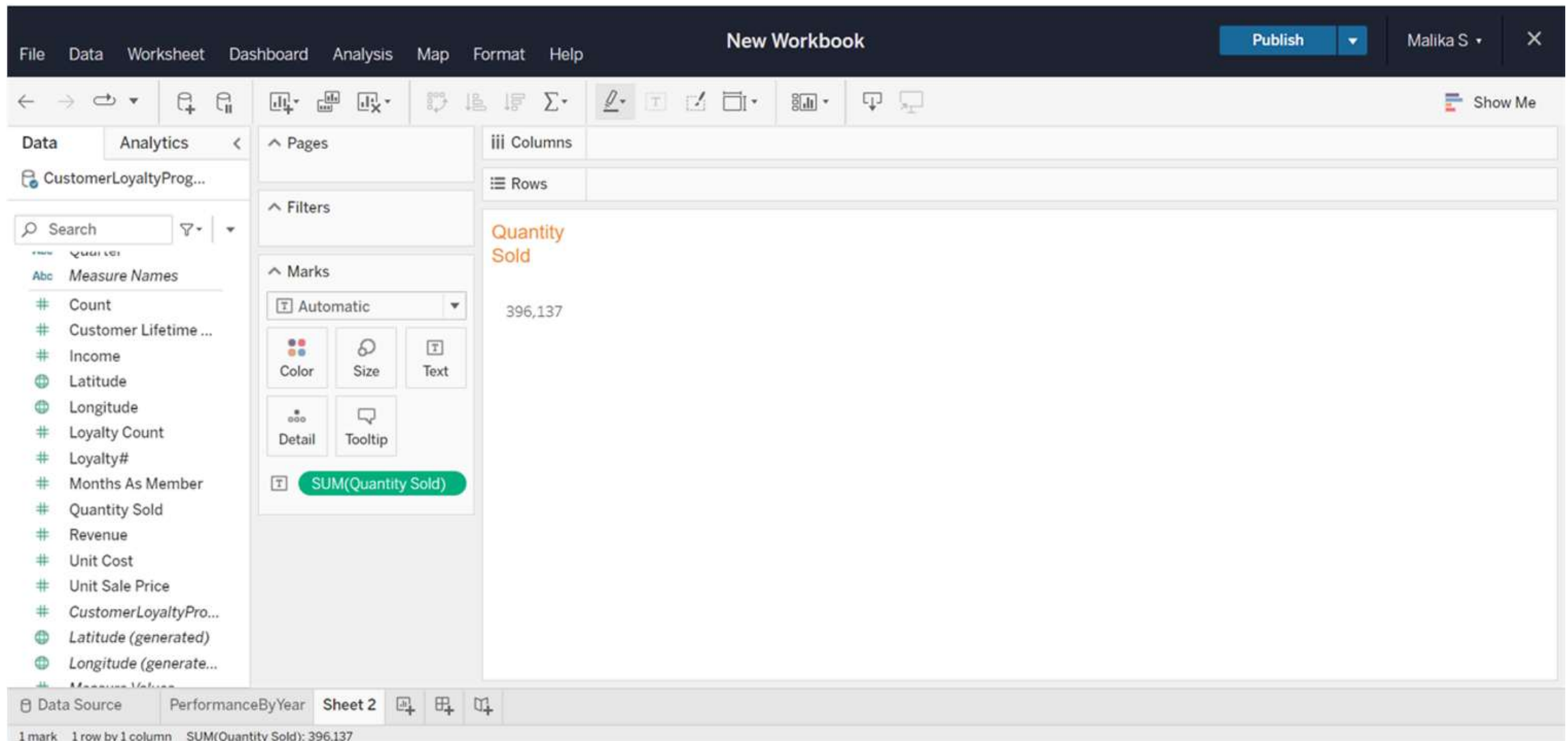
12. To format this attribute, hover the mouse over **SUM (Quantity Sold)**, and you will see a menu. Select **Format Number** from the menu.

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:
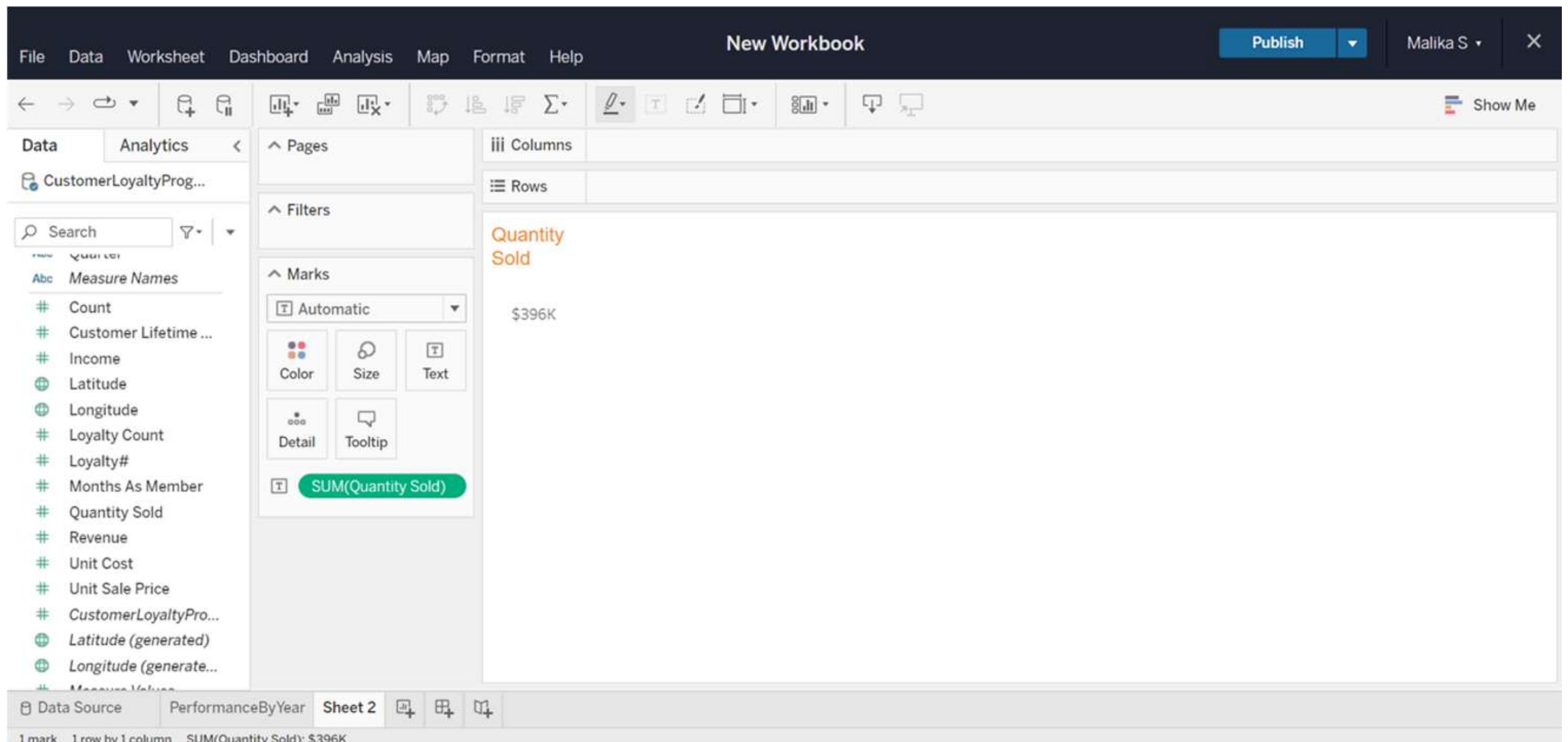
14. Rename Sheet2 to **Quantitysold**.

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.

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

18. Format the displayed revenue value using the same settings as in Step 12.
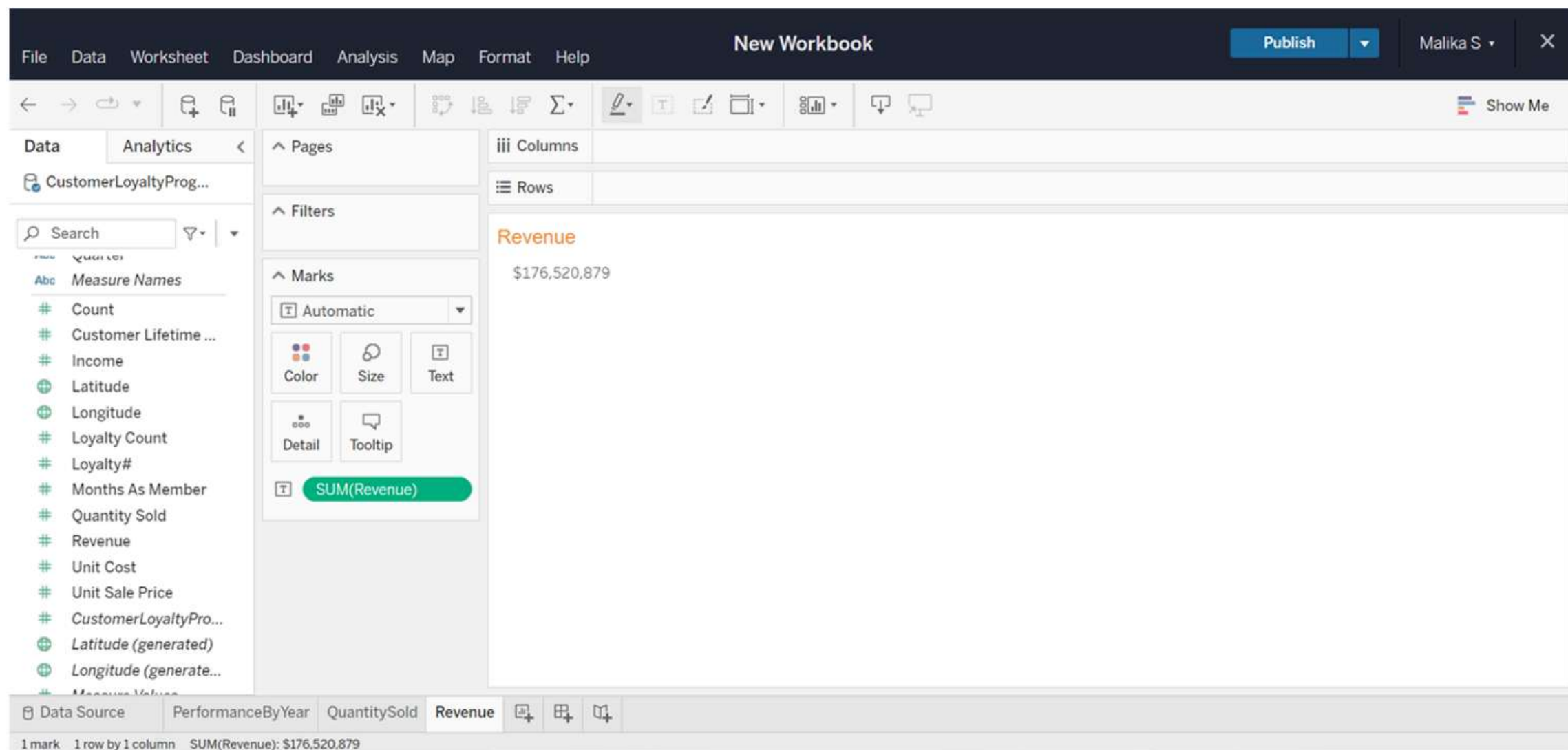
19. Rename **Sheet 3** to **Revenue**.

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

Task C: Create a Dashboard

1. Click the **Create Dashboard** icon.
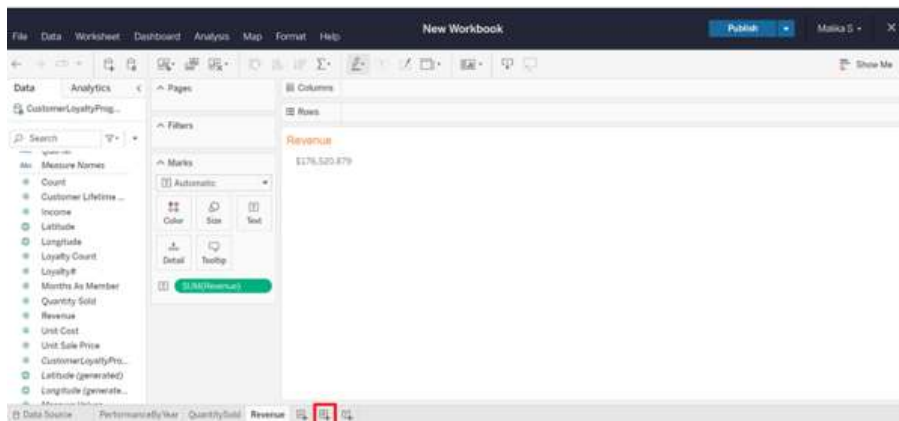
2. In the left pane, you can see the sheets you created. Drag the sheets one by one to the dashboard area to create the dashboard.
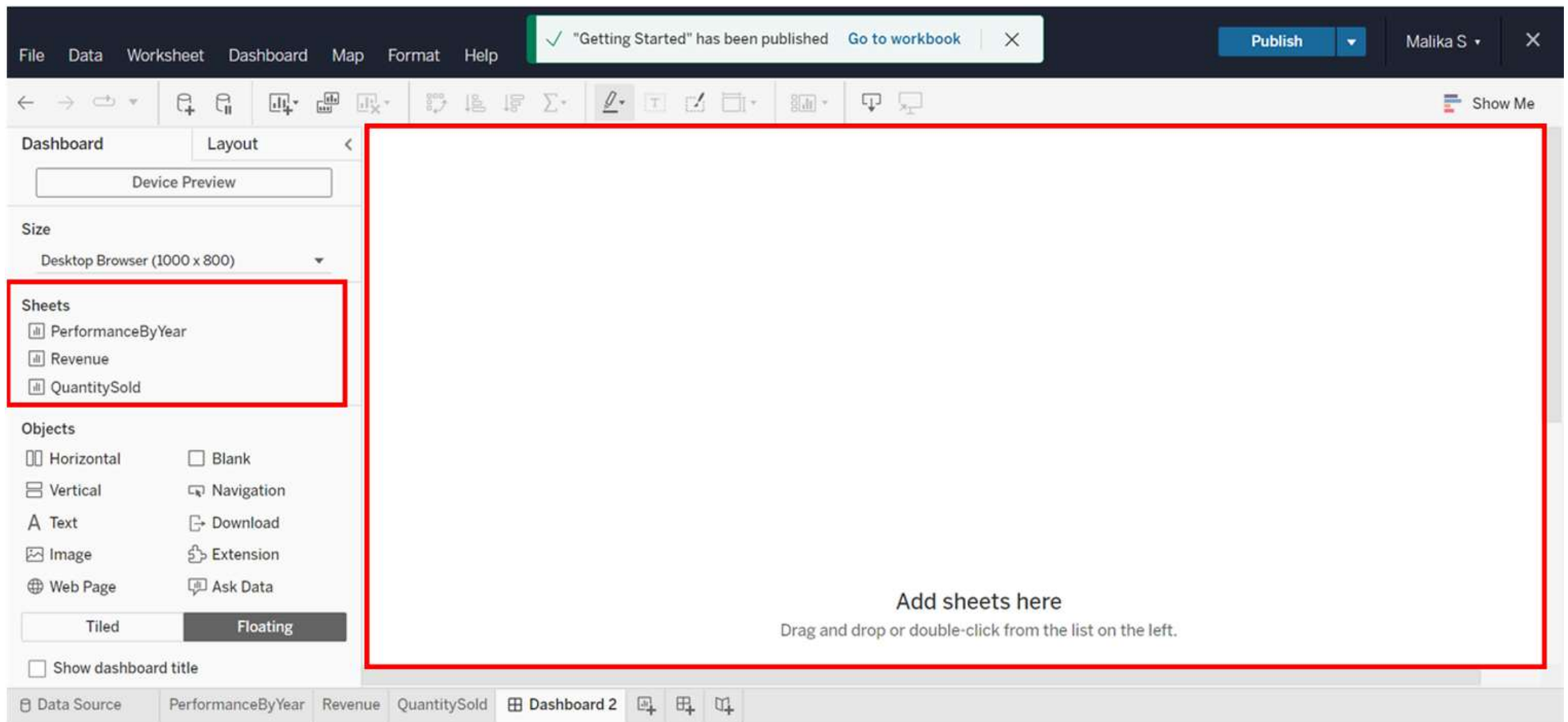
3. The dashboard will appear as shown:
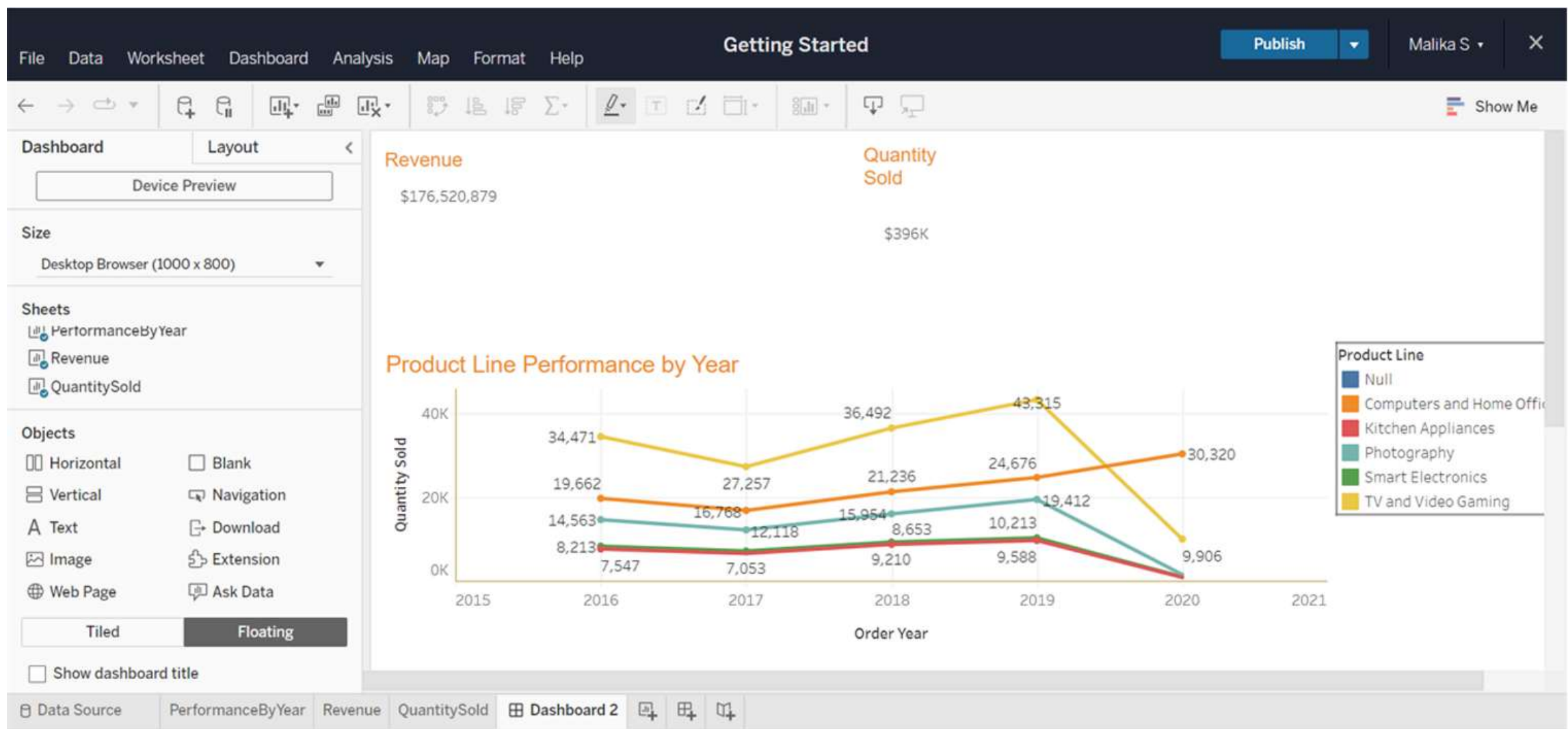
4. You can now add or modify the title of the dashboard. Click **Show dashboard title** and rename the title to **A – Product Sales**.
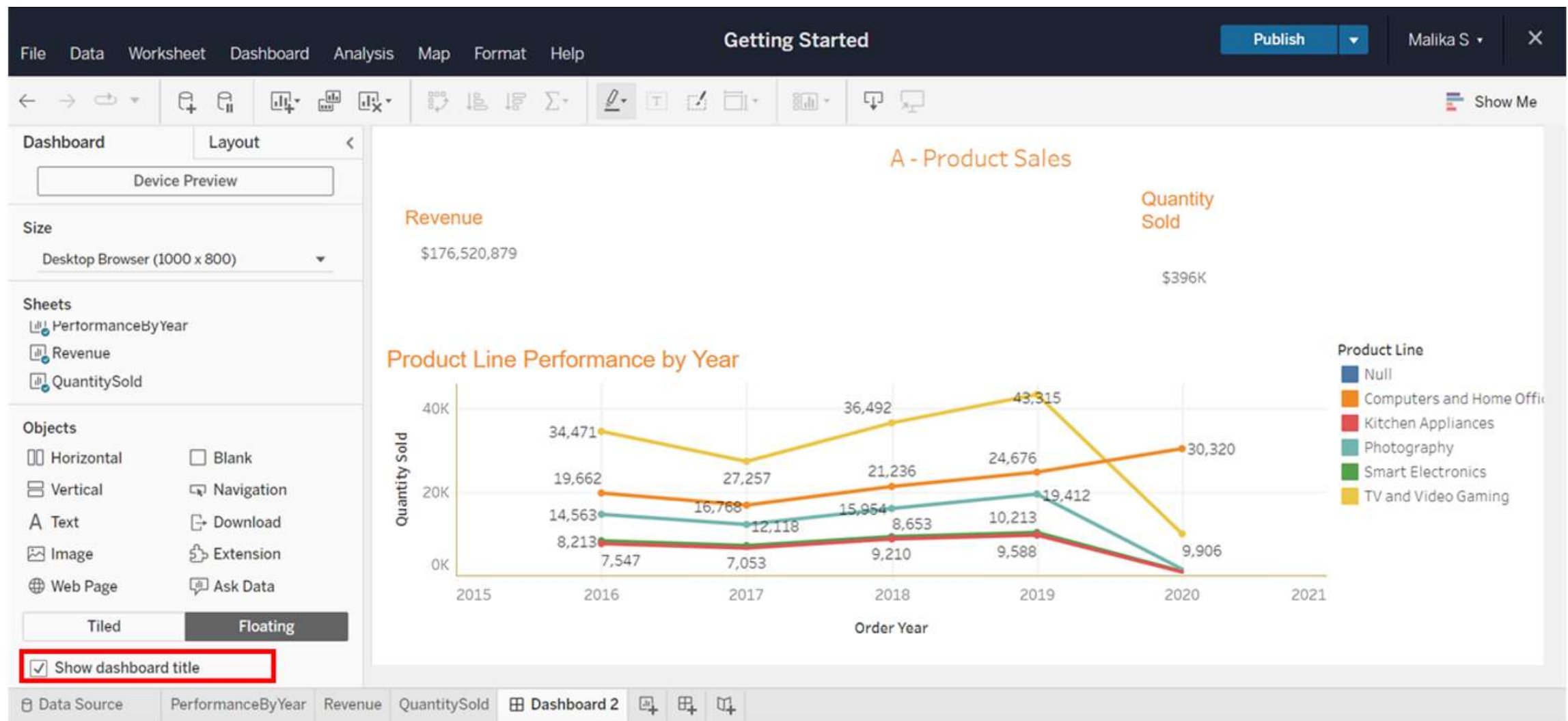
5. Click **Publish** and select the personal space to save your workbook.
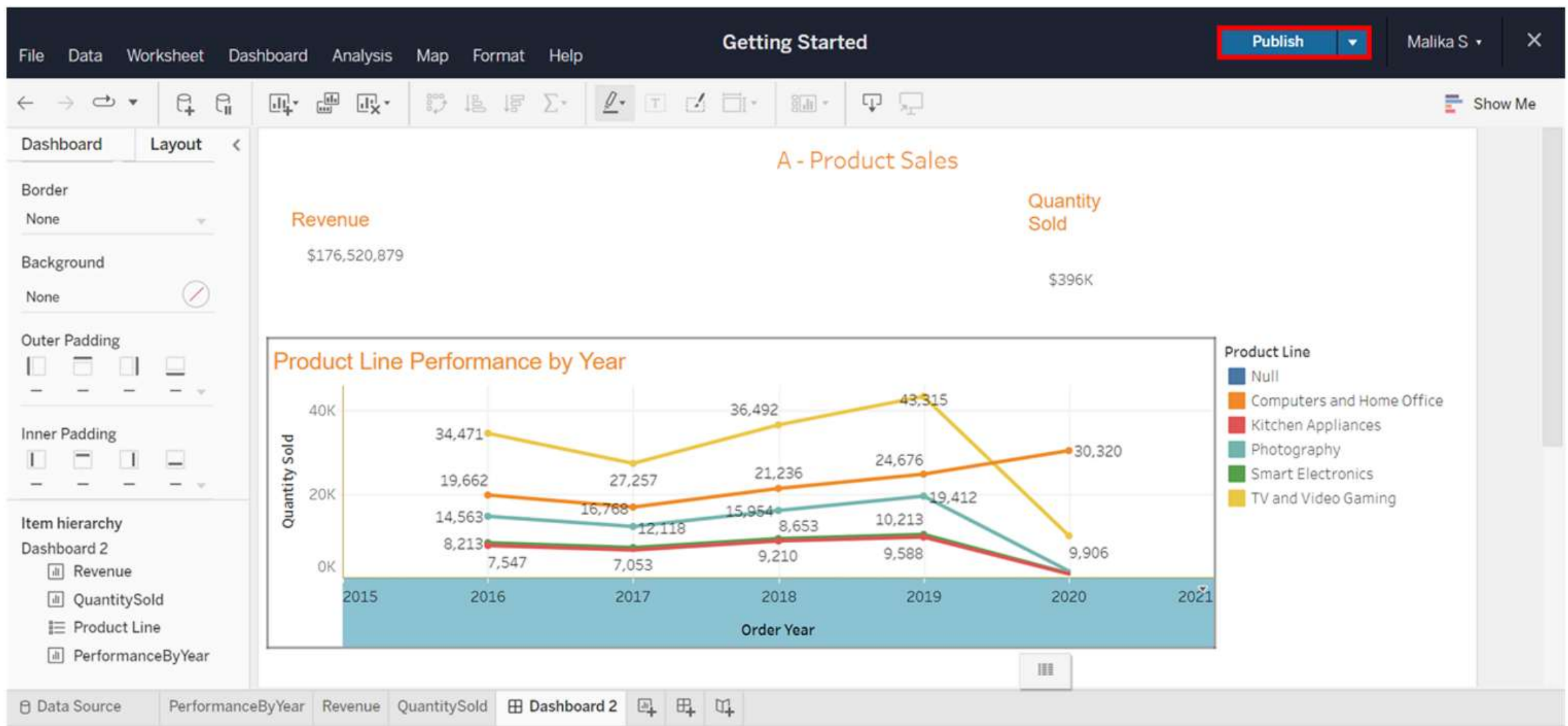
6. Enter workbook **name** and click **Publish**. You can add a password to your workbook as well.

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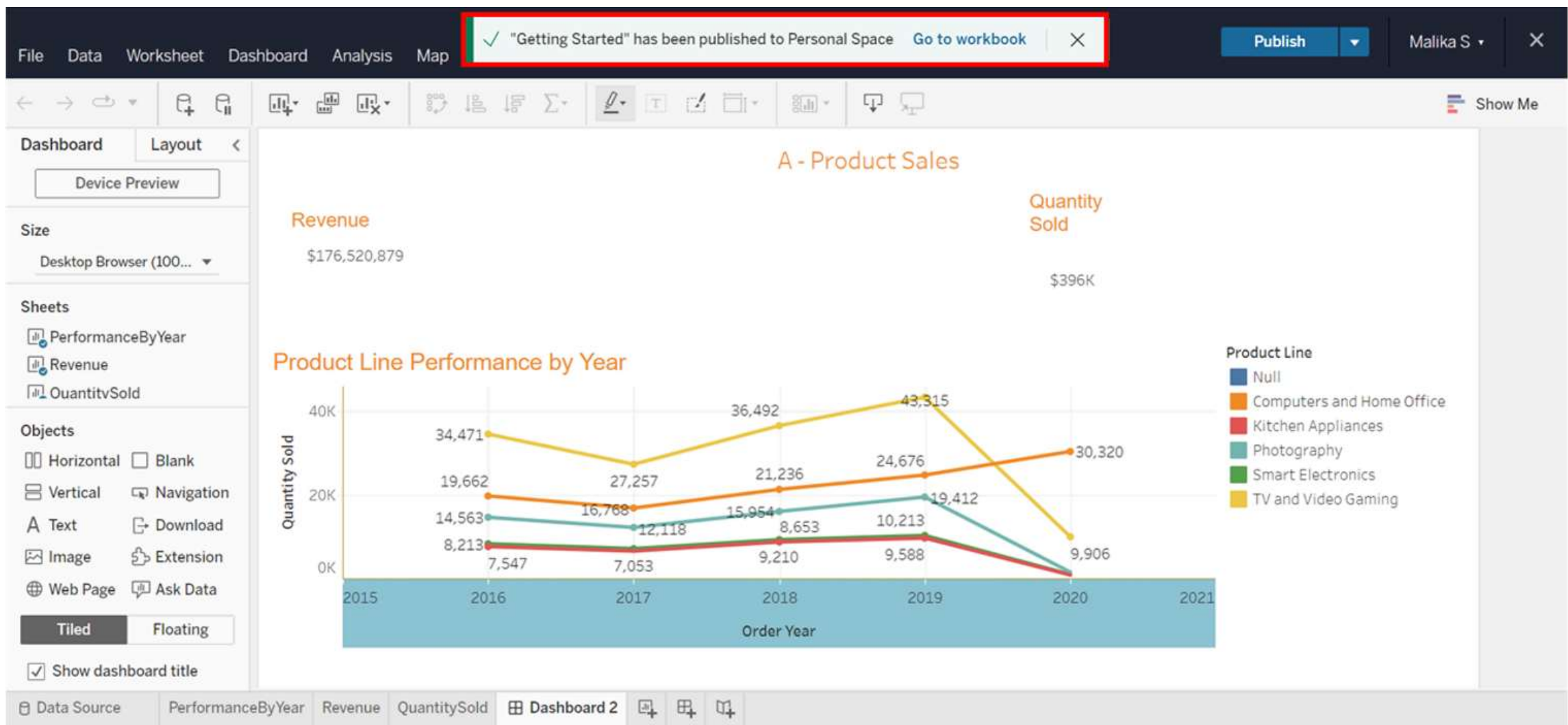
8. In **Personal Space**, you see the dashboard(s) and any content that you have saved. From here, you can add dashboards to **Favorites** or in **Collections** by clicking the three dots.

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

File Data Worksheet Dashboard Analysis Map

Publish ▼   Malika S ▾   ✕

Download

Show Me

Dashboard   Layout   <

Device Preview

Size

Desktop Browser (100... ▾

Sheets

PerformanceByYear
Revenue
QuantitySold

Objects

Horizontal   Blank
Vertical   Navigation
Text   Download
Image   Extension
Web Page   Ask Data

Tiled   Floating

☑ Show dashboard title

A - Product Sales

Revenue

$176,520,879

Quantity
Sold

$396K

Product Line Performance by Year

Product Line
■ Null
■ Computers and Home Office
■ Kitchen Appliances
■ Photography
■ Smart Electronics
■ TV and Video Gaming

40K

34,471   36,492   43,315

19,662   27,257   21,236   24,676   30,320
16,768   15,954   19,412
14,563   12,118   8,653   10,213   9,906
8,213   7,547   7,053   9,210   9,588

Quantity Sold

20K

0K

2015   2016   2017   2018   2019   2020   2021

Order Year

Data Source   PerformanceByYear   Revenue   QuantitySold   ⊞ Dashboard 2

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)

[Malika Singla](#)

[D.M.Naidu](#)

Other Contributor(s)

[Lakshmi Holla](#)

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