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Tableau Hands-on Workshop for Beginners

Follow-along Guide

Follow-along Guide

Before you start

Tableau Desktop

- Installed (<https://www.tableau.com/products/desktop/download>)
- License activated




Dataset

- Sales Results.xls
- Sales Quotas.csv

This document is meant to be used as a help during the Workshop, not as a separate training document. You do not need to study this guide before, it can help as a guide during the session, or when you want to retrace your steps afterwards. The steps will be shown step-by-step during the session on the screen as well.





Step 1 : New data connection and first sheet

- Open Tableau Desktop
- In the left blue pane, click Connect, To a file, Microsoft Excel
- Navigate to Sales Results.xls
- Verify that you can see data in the lower half of the screen
- Click on Sheet 1 at the bottom
- Drag Sales from the Measures at the left to Columns
- Drag Category to Rows, drag Sub-Category to Rows
- Sort descending: 
- Drag Profit to Color 
- Drag Profit to Columns, drag Discount to Columns
- Right-click Discount, go to Measure, click Average.
- Display Labels: 
- Right-click Category, "Show Filter".
- Right click the newly created filter: "Single Value (list)"
- Ensure the (All) option is selected
- Right click the Sheet at the bottom, rename to Product Analysis




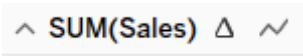
Step 2: Geographic Analysis

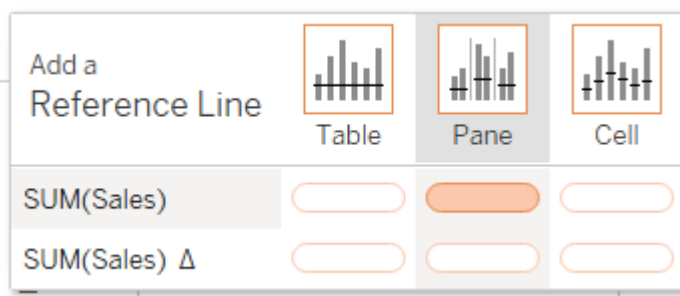
- Create a new sheet at the bottom of your screen: 
- Double-click Country in the Dimensions
- Drag Sales from the measures to Size
- Drag Profit from the measures to Color
- Click the + before Country in the Marks 
- Right-click Profit, "Show Filter".
- Right click the Sheet at the bottom, rename to Sales and Profit



Step 3: Date Analysis

- Create a new sheet at the bottom of your screen: 
- Drag Sales to Rows
- Drag Order Date to Columns
- Click on the + in front of Year(Order Date) in the Columns
- Right-click Quarter(Order Date), select Month (May)
- Drag Sales to Rows (yes, again).
- Right-click the new Sales in the Rows, Quick Table Calculation, “Year over Year Growth”



- Click on Sum(Sales) Δ in the marks: 
- Click on Automatic, change to Bar
- While holding CTRL, drag Sum(Sales) Δ from the Rows to Color
- Verify that only the bars are colored.
- Change the view in the top bar from Standard to “Entire View”
- Click on Analytics in the left hand-side (next to Data)
- Drag Average Line to Sum(Sales) underneath Pane, like below



- Right-click the Average Line, Change Line Label to: “Value”
- Rename Sheet to Sales over Time





Step 4: Combining Data

- Create a new sheet at the bottom of your screen: 
- While holding CTRL, click once on Category, Segment and Sales
- Release CTRL, click “Show Me” choose the recommended Horizontal Bars
- Add a new Data Source , choose Text File
- Navigate to Sales Quotas.csv
- In the Data Preview, Click on Abc above Month, and select Date
- Click on Sheet 4 (the sheet you just created)
- Select Target in the Measures
- Click on Show Me, select Bullet Graph
- Go to the Menu at the top, select Data -> Edit Relationships
- Choose Custom, add $MY(\text{Order Date}) = MY(\text{Month})$. Click OK
- Click the grey Chain icon to the right of Month in the Dimensions
- Go to the Results (Sales Results) dataset and drag Order Date to Pages
- Rename Sheet: Do we meet Quotas?



Step 5: Create your first Dashboard

- Create a new Dashboard from the bottom of your screen:  (different one than before!)
- Change the Size to Automatic on the left
- Drag in the earlier created sheets like you want them to be arranged
- Select Use as Filter for all Sheets in the dashboard, you can find the icon when you select a sheet: 
- Right click the Category Filter: Apply to Worksheets, “All using this Data Source”
- Do the same for other filter you want to use.
- Go to the Menu Dashboard, Format. Change the Formatting of the Worksheet Titles as desired.
- Rename the Dashboard to Overview

Congratulations, you just made your first Tableau Dashboard!

- Save the Workbook so you can easily retrace your steps!

