Goskills

Transitioning From Excel to Tableau

GoSkills online course syllabus

Skill level
Beginner

Lessons
16

Pre-requisites
No prior experience needed

Video duration
1h 32m

Estimated study time
1h 32m

Instructor
Heather Johnson

Introduction

1 Making the switch from Excel to Tableau

As the world begins to lean more heavily on data visualization, it's important to leverage your existing expertise to help you make the transition.

2 Basic navigation and structures

To apply what you're learning in today's course, you must first have access to the Tableau software.

3 FDIC failed bank exercise

Before bringing data over to Tableau, you'll want to take an inventory of the files you have in Excel.

Connecting Excel Data

4 Migrating your data from Excel

To begin to convert your Excel dashboards to Tableau dashboards, you should first connect to your file.

Creating Tableau Worksheets

5 Basics of Tableau worksheets

Every visualization begins with creating a worksheet, which is an individual component that will be placed in your finished dashboard.

6 Creating chronological tables in Tableau

Looking at numbers according to a range of dates is a common component of most dashboards, and something you will want to know.

7 Bar charts and aggregations in Tableau

Aggregating your data in Tableau is one of the most important steps to building easy-to-read dashboards.

8 Creating colored trend charts in Tableau

Trend charts are another helpful data visualization that can indicate data.

9 Creating moving maps in Tableau

In Tableau, you have the ability to move dimensions and measures within a map at once.

10 Adding a filter in Tableau

Filters are one of the most important parts of a dashboard, and most people expect them.

11 Additional tips and tricks in Tableau

There are several additional "pro tips" you can use to build your sheets in Tableau.

Building Your Dashboards

12 Building the framework in Tableau

The first step to take when building a dashboard is to create its framework inside of the Tableau workbook.

13 Adding sheets and filters in Tableau

The most important step to your dashboard is the sheets you pull in, as these are your sources of data.

14 Validating your dashboard in Tableau

Once you've built out your dashboard, you'll want to validate that the data points are being displayed accurately and that your dashboard is behaving as expected.

15 Taking it to the next level in Tableau

There are several creative liberties you can take to enhance your analysis and detail your insights.

Conclusion

16 Tableau communities

Making the transition from Excel to Tableau can feel daunting, but it doesn't have to.

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