

# Transitioning From Excel to Tableau

GoSkills online course syllabus

**Skill level**

Beginner

**Lessons**

16

**Accredited by**

Verified by GoSkills

**Pre-requisites**

No prior experience needed

**Video duration**

1h 32m

**Estimated study time**

1h 32m

**Instructor**

Heather Johnson

## Introduction

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- 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

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- 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

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- 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

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**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

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