

Jumpstart Tableau

A Step-By-Step Guide to Better
Data Visualization



Arshad Khan

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Jumpstart Tableau: A Step-By-Step Guide to Better Data Visualization

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About the Author

Arshad Khan is a versatile IT business intelligence and SAP software professional with over 30 years of experience. He has extensive consulting experience in business intelligence/analytics and SAP. He has consulted for such leading companies as Accenture, PricewaterhouseCoopers, Deloitte, Pacific Gas & Electric Co., Bose Corporation, DaimlerChrysler, Home Depot, Genentech, Chevron, Textron, PepsiCo, Polycom, Unisys, and Hitachi America. Since 2014, Mr. Khan has been consulting for the US Navy as a business intelligence architect. At Juniper Networks (a four-billion-dollar company), he led the Tableau-based analytics development team.

Mr. Khan, who has fifteen books on diverse subjects to his credit, previously authored five books on BI/data warehousing. He has also taught at seven universities, including the University of California (Berkeley, Santa Cruz, and San Diego), since 1995. Mr. Khan has a graduate degree in engineering and an MBA.

About the Technical Reviewer



Girija Chavan is a data analysis and data visualization evangelist who has provided professional consulting to companies such as Juniper Networks, Hewlett-Packard, and Accept Software. Girija has been invited to teach Tableau at UCSC Extension and at Santa Clara University. She was a guest speaker at the 2014 Annual Tableau Conference. She has completed advanced Tableau Desktop and Server training, Jedi training, and Stephen Few's workshops for data visualization, and she continues to pursue studies in the fields of data science and predictive analytics.

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Introduction

Jumpstart Tableau aims to teach novices the basics of Tableau software so that they can quickly develop simple reports and visualizations. Tableau is a very powerful software with a very rich set of features and functionality. However, to get started, users need to learn only a few key functions, which are widely used in every type of business. This book aims to teach those basic functions through a series of exercises, which are based on step-by-step instructions. Learning these exercises will not make anyone an expert. However, they will provide enough knowledge and hands-on capability to novices so that they can quickly develop powerful and professional-looking visualizations.

Jumpstart Tableau contains 40 exercises. Of these, one explains the Tableau interface, while the others provide step-by-step instructions for performing various functions. Functions covered include swapping, sorting, drill down, grouping, hierarchies, aggregation, filtering, formatting, and trending. The exercises show how to delete, copy, and save workbooks, export the data/results to Excel or PDF, and display the detailed underlying data. They also demonstrate analysis functions, including Top N and forecasting.

Jumpstart Tableau also contains step-by-step exercises that demonstrate how to create a dashboard, incorporate quick filters in dashboards, and use layout formatting, as well as how to cascade worksheet changes in a dashboard.

The exercises in this book are based on two sample data files provided by Tableau Software. These files can be downloaded from www.apress.com/9781484219331.