

# Using Tableau

Tableau is a software package that allows users to visualize and analyze data quickly without the need for programming. It also allows for multiple views of data to be combined into smart dashboards and shared live on the web or even in mobile devices. The software is uniquely suited for analyzing large amounts of data in accounting and helps prepare students for a better opportunity in the job market. Current job openings reveal that quite a few top companies are looking for Tableau talent. Some of these companies include: Facebook, Dell, Applied Systems, Booz Allen Hamilton, NetJets, University of California, Groupon, General Motors, Sony Electronics, Sunguard, Bank of America, KPMG, and Verizon.<sup>1</sup>

Accountants today are expected to be able to take any data, reformat it, analyze it, and present it in a way that is understandable to all. In answer to the need for students to manipulate and analyze a large volume of data, cases have been incorporated into each of the textbook chapters. Tableau provides free instructor and student licenses as well as free videos and support for utilizing and learning the software. Each case lists the links to the Tableau videos needed for the background knowledge to solve each case. Relevant data files are provided on the site: <https://www.tableau.com/academic/teaching>.

Each chapter includes a data analytics case using Tableau. The instructions will provide links and details on the exact videos the students will need to watch prior to addressing the case. Free training videos are located here: <http://www.tableau.com/learn/training>. The videos provide all the necessary knowledge to solve the case. A Tableau student resource page can be found here: <https://community.tableau.com/community/students/overview>.

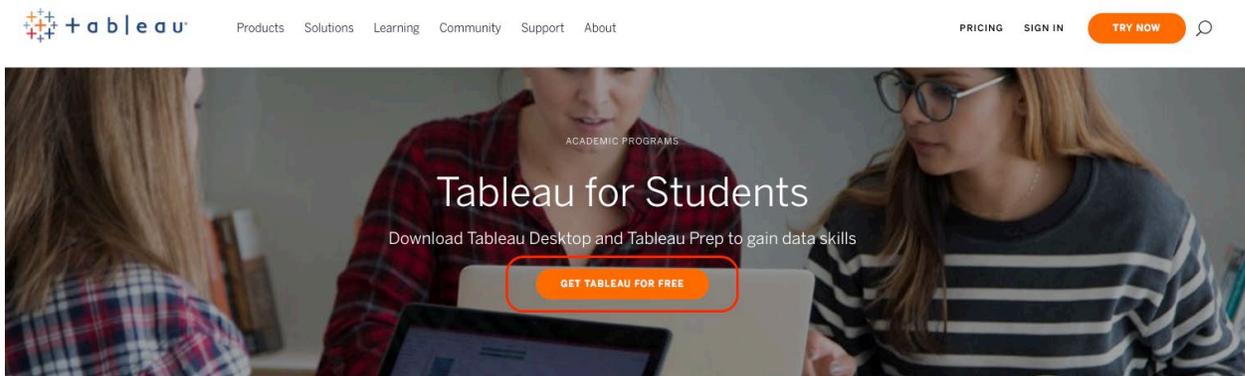
Excel files can be accessed through McGraw Hill for use with the data analytics cases. Students should download these files to the same computer that the Tableau software has been downloaded. It is recommended that the files be saved in a folder for later use and easy access, as they will be used in several chapters.

## Getting Started with Tableau: Student Instructions

All students around the world can get a free one-year subscription to Tableau Desktop and Tableau Prep! For purposes of the Data Analytics Cases available with Spiceland Intermediate 10e, we will only ask you to use Tableau Desktop.

To sign up for your free Tableau account and get started, here are your steps:

1. Access <https://www.tableau.com/academic/students>
2. You'll see a page that looks like the following screenshot – click on the orange “Get Tableau for Free” button.



<sup>1</sup> <https://www.edureka.co/blog/tableau-career-opportunities-101>

3. You'll then see a registration page that looks like the following screenshot. Complete the requested fields.

The screenshot shows a registration page with the following content:

- Header: "You're almost there!"
- Text: "Students (K12 and postsecondary) at accredited academic institutions worldwide are eligible for a free one-year license to activate Tableau Desktop and Tableau Prep. Complete the form below to confirm your eligibility and unlock your new free license."
- Text: "Are you an instructor? Visit [tableau.com/teaching](https://tableau.com/teaching) to request your license."
- Section: "Country"
- Form: "Country (of school)\*" with a dropdown menu showing "Select one:"
- Section: "Personal Information"
- Form: "Legal First Name\*" with input field "Legal First Name"
- Form: "Legal Last Name\*" with input field "Legal Last Name"
- Form: "Email\*" with input field "Email"
- Form: "Confirm Email\*" with input field "Confirm Email"
- Section: "School information"

4. You'll be asked to verify that you are a student by providing a screenshot of some documentation.

The screenshot shows the "UPLOAD DOCUMENTATION" page with the following content:

- Header: "UPLOAD DOCUMENTATION"
- Text: "To complete verification, please submit any document that clearly shows your name and your specific affiliation."
- Text: "Important - Your document must display the following:"
- List:
  - Your full name (Rebecca Olson)
  - Your affiliation (College of William and Mary)
- Text: "If your name or affiliation (shown above) are not correct, please click [here](#) to enter your information again."
- Text: "Examples of acceptable documents are:"
- List:
  - ID card with expiration date in the future
  - Transcript with current course schedule
  - Other school-issued document
- Text: "Acceptable file formats are: .bmp, .gif, .jpg, .png, or .pdf."
- Form: "Choose file" button and "No file selected" text