



Course Descriptions

Introduction and Overview

- Why Tableau? Why Visualization?
- Level Setting – Terminology
- Getting Started – creating some powerful visualizations quickly
- The Tableau Product Line
- Things you should know about Tableau

Getting Started

- Connecting to Data and introduction to data source concepts
 - Working with data files versus database servers
- Understanding the Tableau workspace
- Dimensions and Measures
- Using Show Me!
- Tour of Shelves (How shelves and marks work)
- Building Basic Views
- Help Menu and Samples
- Saving and Sharing your work

Concepts and Options when Connecting to Data

- Overview of other connection options
 - Joining multiple tables
 - Copy and Paste
 - Data Extracts

- Custom SQL
- Publishing and Re-using Data Connections
- Understand how to deal with data changes in your data source such as field addition, Deletion or name change
- Re-using and sharing data connections – the concept of meta data
- Working with multiple connections in the same workbook

Analysis

- Creating Views
 - Marks
 - Size and Transparency
 - Highlighting
 - Working with Dates
 - Date aggregations and date parts
 - Discrete versus Continuous
 - Dual Axis / Multiple Measures
 - Combo Charts with different mark types
 - Geographic Map
 - Page Trails
 - Heat Map
 - Density Chart
 - Scatter Plots
 - Pie Charts and Bar Charts
 - Small Multiples

- Working with aggregate versus disaggregate data

Analyzing

- Sorting & Grouping
- Aliases
- Filtering and Quick Filters
- Cross-Tabs (Pivot Tables)
- Totals and Subtotals
- Drilling and Drill Through
- Aggregation and Disaggregation
- Percent of Total
- Working with Statistics and Trend lines

Getting Started with Calculated Fields

- Working with String Functions
- Basic Arithmetic Calculations
- Date Math
- Working with Totals
- Custom Aggregations
- Logic Statements

Formatting

- Options in Formatting your Visualization
- Working with Labels and Annotations
- Effective Use of Titles and Captions
- Introduction to Visual Best Practices

Working with Data

- Data Types and Roles
 - Dimension versus Measures
 - Data Types
 - Discrete versus Continuous
 - The meaning of pill colors
- Database Joins
- Working with the Data Engine / Extracts and scheduling extract updates
- Working with Custom SQL
- Switching to Direct Connection
- Building meta data via shared Data Source connections
- OLAP considerations (Overview)

Building Interactive Dashboards

- Combining multiple visualizations into a dashboard
- Making your worksheet interactive by using actions and filters
- An Introduction to Best Practices in Visualization

Sharing Workbooks

- Publish to Reader
- Packaged Workbooks
- Publish to PDF
- Publish to Tableau Server and Sharing over the Web

Putting it all together

- Scenario-based Review Exercises
- Best Practices

Security

- Manage users, groups, sites, and permissions in Tableau Server
 - Add, edit, and delete user accounts

Where to get Further Assistance

- The Help File / Manual
- Knowledge base
- Forums
- Whitepapers & Books
- Technical Support