

# Tableau

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## Course Content

### **SECTION ONE – Getting Started With Tableau**

- Introduction to Tableau and an overview of the different versions
- Installing Tableau Desktop
- Tableau Help and online resources
- Quiz

### **SECTION TWO – Working With Tableau**

- Understanding Tableau User Interface
- Exploring Tableau File Types
- Understanding Green and Blue Pills
- Working with Available Data Sources
- Working with extracts instead of live connections
- Quiz

### **SECTION THREE – Deep diving with Data and Connections**

- Working with Excel Data Interpreter
- Understanding Metadata and sharing data source connections
- Filtering data from your data source
- Learning how to Split fields
- Pivoting Data
- Quiz

## **SECTION FOUR – Creating Charts**

- The Show Me Feature
- Crosstabs and Heat Maps
- Using Bar, Stacked Bar and Side-by-side Bars
- Pie Charts
- Line and Area Charts
- Working with Packed Bubble
- Using Treemaps
- Creating a Basic Scatter Plot
- Creating a Basic Map
- Quiz

## **SECTION FIVE – Adding calculations to your workbook**

- Introduction to Calculations (this will explain the various flavours of calculations and the mechanics of calculations)
- Understanding Basic calculations
- Understanding String Calculations
- Learning about Boolean, If-Then calculations, and Case statements
- Understanding the Basics of Date Calculations
- Understanding Aggregation and Disaggregation
- Using calculations to add insight to your visualizations
- Quiz

## **SECTION SIX – Mapping data in Tableau**

- Introduction to Mapping in Tableau
- Create a standard map view
- Dealing with map errors

## **SECTION SEVEN – Dashboards & Stories**

- Introduction to Dashboards
- Understanding Dashboard Actions
- Understanding Dashboard formatting basics
- Understanding Workbook level formatting (i.e. font styling, titles, lines)
- Assembling Your Dashboards Into A Story
- Quiz

## **SECTION EIGHT – Visualizations For An Audience**

- Focusing on the narrative
- Using colour with a purpose
- Understanding the importance of using tooltips for your audience
- Using a Parameter To Focus the Audience's Attention
- Removing clutter in your Dashboard
- How to export your dashboard to another file type
- Quiz

## **PROJECTS:**

- Project 1: Sales Performance Analysis
- Project 2: Customer Analysis
- Project 3: Product Analysis
- Project 4: Sales Dashboard