Tableau Course Content

Chapter – I: The Tableau Environment

The Tableau Workspace

- Data Window
- Toolbar, Status Bar
- Tooltips, Cards and Shelves
- Reorganizing the Workspace
- Workbooks and Sheets
- Changing the Repository Location

Chapter – II Connect to Data

Connecting Data

- How to Connect to a Data Source
- Connect Live/Import
- Editing a Connection
- Replace Data Source
- ***Replacing Field References***
- Renaming the Connection
- Duplicating the Connection
- Refreshing the Data
- Closing the Connection
- ***Clipboard Data Sources***
- Number of Records
- Latitude and Longitude,
- Measure Names, values

Data Types and Roles

- Data Types
- Data Roles

Joining Tables

- Adding Tables
- Editing Tables
- Custom SQL

Working with Multiple Sources

- *Understanding **Data Blending***
- Adding a Secondary Connection
- Defining/Edit Relationships

Data Window Features and Functions

- Folders
- Sort
- Find Fields
- Rename Fields
- Combine Fields
- Hide or Unhide Fields
- Add Fields to the Data Window (calculation field)

Editing Field Properties

- Comments
- *Aliases*
- *Hierarchies*
- Colors
- Shapes
- Formats
- Sort
- Aggregation
- Grouping
- Sets
- Aggregation & Disaggregation

Chapter – III: Building Data Views

Parts of the View

- Headers, Axes
- Panes, Cells, Marks Card
- Mark Borders
- Titles, Captions
- Field Labels
- Legends

Building Views Manually

- Dragging Fields
- Shelves and Cards
- Example - Building Data Views Manually

Building Views Automatically

- Show Me
- Add to Sheet: Double-Click

All Views – 24 Types

Filtering

- Adding Filters
- Sharing Filters
- Context Filters

Actions

- Filter Actions
- Highlight Actions
- URL Actions
- Running Actions
- Actions on work sheets and Dashboards
- Using Field and Filter Values in Actions

Chapter – IV: Advanced Analysis

Calculations

- Calculated Fields
- Table Calculations
- Binned Data
- Totals, Percentages

Parameters

- Creating Parameters
- Editing Parameters
- Using Parameters in Calculations
- Using Parameters in Filters
- Using Parameters in Reference Lines
- Using Parameters in Custom SQL
- Using Parameters in Bins
- Using Parameters in Dim & Measures

Using Multiple Measures

- Individual Axes
- Blended Axes
- Dual Axes
- Combination Charts

Forecasting

- Forecasting Constraints
- How Forecasting Works in Tableau
- To Create a Forecast

Trend Lines and Statistics

- Adding Trend Lines
- Removing Trend Lines
- The Trend Line Model
- Removing Factors from the Model

Background Images

- Adding Background Images
- Setting up the View
- Managing Background Images

Background Maps

- Geographic Roles
- Building a Map View
- Map Options
- Setting a Default Location
- Editing Locations
- Custom Geo-coding
- Background Map Sources
- Map Storing and Working Offline

Chapter – V:Publish and Share

Formatting

- Worksheet Level Formatting
- Formatting Specific Parts of the View
- Copying and Pasting Formatting
- Workbook Themes
- Resizing the Table
- Editing Axes
- Annotations and Mark Labels

Dashboards

- Creating Dashboards
- Organizing Dashboards
- Understanding Dashboards and Worksheets

Saving and Exporting

- Saving Your Work
- Reverting Workbooks
- Exporting Your Work
- Copying Information between Workbooks

Tableau Server Comprehensive

- Create the First Admin User & users.
- Create sites, Projects & Groups.
- Create users & assign users to sites, Groups
- Assign Permissions to Projects
- Publishing Workbooks
- Publishing Data Sources
- Setting Permissions
- Opening Workbooks from the Server
- Importing Data Sources from the Server
- Exporting the Data Source Connection
- User Filtering