

Tableau Course Content

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
 - Data Blending
 - 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 Trendlines

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

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 Office
- Publish to PDF
- Publish to Tableau Server and Sharing over the Web

Putting it all together

- Scenario-based Review Exercises
- Best Practices

Where to get Further Assistance

- The Help File / Product Manual
- Knowledge base
- Forums
- Whitepapers & Books
- Further Training Offerings & Professional Services
- Technical Support