

# Tableau 10.x

## Course Overview



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# Prerequisites

- Knowledge of databases and basic SQL Queries
- Basic idea on visualizations and dash boards
- Windows OS with minimum 2 GB RAM
- Latest version of Tableau Desktop

# Learning Objectives

- Understand the many options to connect to data.
- Understand the Tableau interface/paradigm – components, shelves, data elements and terminology.
- Create basic calculations including string manipulation, basic arithmetic calculations, custom aggregations and ratios.
- Able to represent your data using different visualization types.
- Use trend lines, reference lines and statistical techniques to describe your data.
- Understand how to use group, bin, hierarchy, sort, set and filter options effectively.
- Work with formatting options to fine tune the presentation.
- Understand how to deal with data changes in data source.
- Combine your visualizations into interactive dashboards and publish them to the web.

# Module 1

## Tableau Introduction & Overview

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

# Module 2

## Getting started with Tableau

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



# Module 3

## Connection Options & Concepts

- 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 metadata
- Working with multiple connections in the same workbook

# Module 4

## Data Analysis

## Creating Views

- Marks
- Size and Transparency
- Highlighting
- Working with Dates
- 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 and 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

# Module 5

## Working with Calculated Fields

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

# Module 6

## Formatting with Tableau



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

# Module 7

## 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

# Module 8

# Publishing Workbooks

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

Thank You