Tableau Fundamentals 2-Day Class

Course Duration: 2 Days

Audience: This course is designed for the beginner to intermediate-level Tableau user. It is for anyone who works with data – regardless of technical or analytical background. This course is designed to help you understand the important concepts and techniques used in Tableau to move from simple to complex visualizations and learn how to combine them in interactive dashboards.

Prerequisites: None

Learning Objectives: At the end of this class, the student will be able to:

- Understand the many options for connecting to data
- Understand the Tableau interface / paradigm – components, shelves, data elements, and terminology. The student will be able to use this knowledge to effectively create the most powerful visualizations.
- Create basic calculations including string manipulation, basic arithmetic calculations, custom aggregations and ratios, date math, logic statements and quick table calculations
- Able to represent your data using the following visualization types:
    - Cross Tab
    - Geographic Map
    - Page Trails
    - Heat Map
    - Density Chart
    - Scatter Plots
    - Pie Chart and Bar Charts
    - Small Multiples
    - Dual Axis and Combo Charts with different mark types
    - Options for drill down and drill across
- Use Trend Lines, Reference Lines and statistical techniques to describe your data
- Understanding how to use group, bin, hierarchy, sort, set and filter options effectively
- Work with the many formatting options to fine tune the presentation of your visualizations
- Understand how and when to Use Measure Name and Measure Value
- Understand how to deal with data changes in your data source such as field addition, deletion or name change
- Understand all of your options for sharing your visualizations with others
- Combine your visualizations into Interactive Dashboards and publish them to the web

Course includes: This course will include extensive hands-on activities to re-enforce the skills and knowledge attained.

Course Topics:

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