



TABLEAU COURSE CONTENT

Presented By

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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
- Tour of Shelves
- 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
- Publishing and Re-using Data Connections
- Re-using and sharing data connections

Analysis

- Creating Views
- Marks
- Size and Transparency
- 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

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
- 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

Filtering, Sorting & Grouping

- Advanced options for filtering and hiding
- Understanding your many options for ordering and grouping your data: Sort, Groups, Bins, Sets
- Understanding how all of these options inter-relate

Data Types and Roles

- Dimension versus Measures
- Data Types
- Discrete versus Continuous
- The meaning of pill colors
- Database Joins
- Data Blending
- Working with the Data Engine / Extracts and scheduling extract updates
- Working with Custom SQL
- Adding to Context
- Switching to Direct Connection
- Building meta data via shared Data Source connections

Working with Calculated Data and Statistics

- A Quick Review of Basic Calculations
- Arithmetic Calculations

- String Manipulation
- Date Calculations
- Quick Table Calculations
- Custom Aggregations
- Custom Calculated Fields
- Logic and Conditional Calculations
- Conditional Filters
- Advanced Table Calculations
- Understanding Scope and Direction
- Calculate on Results of Table Calculations
- Complex Calculations
- Difference From Average
- Discrete Aggregations
- Index to Ratios
- Understanding where Calculations Occur
- Statistics
- Reference / Trend Lines
- Statistical Calculations
- Summary Stats
- Working with Dates and Times
- Continuous versus Discrete Dates
- Dates and Times
- Reference Dates

Advanced Mapping

- Fundamentals Review: Building basic maps
- Fixing geographies
- Geographic Fields
- Built-in Demographics / Layering
- WMS – working with a Web Map Service
- Importing Custom Geographies
- Assigning Geographies to Non-Geographic fields
- Distance Calculations
- Spatially Visualizing non-Geographic Data using background images
- geo-coding

Working with Parameters

- Parameter Basics
- Data types of parameters
- Using parameters in calculated fields
- Inputting parameter values and parameter control options
- Advanced Usage of Parameters
- Using parameters for titles, field selections, logic statements, Top X

Building Advanced Chart Types and Visualizations / Tips & Tricks

- Bar in Bar
- Box Plot
- Bullet Chart
- Custom Shapes
- Gantt Chart

- Heat Map
- Pareto Chart
- Spark Line
- KPI Chart

Best Practices in Formatting and Visualizing

- Formatting Tips
- Drag to Legend
- Edit Legend
- Highlighting
- Labeling
- Working with Nulls
- Annotations and Display Options

Building Better Dashboards

- Interactive Dashboards
- Quick Filters
- Dashboard Objects
- Filter Actions
- Highlighting and Actions
- Performance
- Publish to Web
- Zones
- Guided Analytics
- Cascading Filters
- Highlighting
- Quick filter Options
- Select then See Visual
- Self-Populating Dashboards
- Shortcuts
- URL Actions

Tableau Server

- Complete basic installation of Tableau Server
- Describe the functionality provided by Tableau Server and how it extends the power of Tableau Desktop to a broader audience
- Describe how Tableau Server fits into the Tableau Product Suite and how the various products interact
- Explain reasons for choosing Tableau Server
- From an administrator's perspective, describe how end-users interact with Tableau Server
- Describe the functions of each of the components of Tableau Server
- Describe the levels of security in Tableau Server and define how they are used
- Manage users, groups, sites, and permissions in Tableau Server
- Describe content structures within Tableau Server
- Use the Tabadmin command line utility