

Classroom Course Description

Tableau Fundamentals

Audience

Tableau Fundamentals serves the beginner to intermediate Tableau user; targeted towards anyone who works with data – regardless of technical or analytical background. This course helps you implement important concepts and techniques in Tableau. Move from simple to complex visualizations and combine them in interactive dashboards.

Duration

Two day live classroom or five day virtual classroom instruction.

Prerequisites

None.

Course Includes

This course includes a workbook containing key concepts on each topic covered and hands-on activities to reinforce the skills and knowledge attained. It also includes a flash drive containing supporting workbooks and data sources for the activities.

At the end of this course, you will be able to:

- + Connect to your data.
- + Understand Tableau terminology.
- + Use the Tableau interface / paradigm to effectively create powerful visualizations.
- + Create basic calculations including string manipulation, basic arithmetic calculations, custom aggregations and ratios, date math, logic statements and quick table calculations.
- + Represent your data using various visualization types:
 - Crosstabs
 - Geographic maps
 - Motion charts
 - Heat maps
 - Tree maps
 - Different mark types on dual axis/combo charts
 - Drill down/drill across on dashboards
 - Scatter plots
 - Pie and bar charts
 - Bins and histograms
 - Density charts
 - Highlight tables
- + Use statistical techniques to describe your data.
- + Use groups, bins, hierarchies, sorts, sets, and filters to create focused and effective visualizations.
- + Use Measure Name and Measure Value fields to create visualizations with multiple measures and dimensions.
- + Handle changes in your data source such as field addition, deletion or name changes.
- + Share your visualizations with others.
- + Combine your visualizations into interactive dashboards and publish them to the web.

Course Outline

Introduction

- + Tableau Desktop and the Tableau Product Line
- + Application Terminology
- + Visual Cues for Fields

Connecting to Data

- + Creating a Live Data Connection
- + Saving a Data Source
- + Sharing a Data Source
- + Understanding Changes to Data
- + Other Data Connection Options in Tableau

Creating Basic Visualizations

- + Getting Started in Tableau Desktop
- + Elements of a Visualization
- + Formatting Your View

Simplifying and Sorting Your Data

- + Data Filtering
- + Sorting

Organizing your Data

- + Using Groups
- + Creating and Using Hierarchies
- + Creating a Combined Field
- + Using Sets

Slicing your Data by Date

- + Working with Dates
- + Using Discrete Date Parts
- + Creating Date Filters
- + Defining a Fiscal Year
- + Creating Custom Dates

Using Multiple Measures on the Same Axis

- + Comparing Views with Multiple Measures
- + Using Measure Values and Measure Names
- + Combo Charts
- + Combined or Shared Axis Charts
- + Creating Dual Axis Charts

Showing the Relationship between Numerical Values

- + Options for Showing Numerical Relationships
- + Creating Scatter Plots
- + Creating Heat Maps

Mapping Data Geographically

- + Mapping in Tableau
- + Geographic Mapping

Viewing Distributions

- + Bins and Histograms

Viewing Specific Values

- + Creating Crosstabs
- + Creating Highlight Tables
- + Grand Totals, Sub-totals, and Changing Aggregation

Customizing your Data

- + Calculation Types
- + Creating Calculated Fields
- + Using Logic Statements
- + Type Conversions and Date Calculations
- + Using Quick Table Calculations
- + Calculations and Aggregations

Using Parameters for Dynamic Values

Showing Breakdowns of the Whole

- + Pie Charts and Parts of the Whole
- + Creating Tree Maps

Highlighting Data with Reference Lines

- + Using Reference Lines and Reference Bands

Showing Data History

- + Creating Motion Charts

Making Your Views Available

- + Building Dashboards
- + Dashboard Actions
- + Using Drill Downs

Sharing Your Work

- + Export to an Image File
- + Exporting the Data Only
- + Other Sharing Options



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