

Tableau Advanced Course

Course Duration: 2 Days | Prerequisites: Tableau Fundamentals and/or equivalent

Audience:

This two day course is designed to provide you with the skills required to become a Tableau power user. The course is designed for the professional who has solid working experience with Tableau and wants to take it to the next level.

You should have a deep understanding of all the fundamental concepts of building worksheets and dashboards, but may scratch your head when working with more complex issues.

Learning Objectives:

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

- + Build advanced chart types and visualisations
- + Build complex calculations to manipulate your data
- + Work with statistics and statistical techniques
- + Work with parameters and input controls
- + Implement advanced geographic mapping techniques and use custom images and geo-coding to build spatial visualisations of non-geographic data
- + Implement all options in working with data: Joining multiple tables, data blending, performance considerations and working with the Data Engine, sharing your connections as meta data, and understand when to implement which connection method.
- + Build better dashboards using techniques for guided analytics, interactive dashboard design and visual best practices
- + Implement many efficiency tips and tricks
- + Understand the basics of Tableau Server and other options for sharing your results

Hands-on Learning:

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

Course Topics:

Introduction and Getting Started

- + Why Tableau? Why Visualisation?
- + The Tableau Product Line
- + Level Setting - Terminology
- + Getting Started - creating some powerful visualisations quickly
- + Review of some key fundamental concepts

Filtering, Sorting & Grouping

These are fundamental concepts when working with and analysing data. We will briefly review these topics as they apply to Tableau.

- + 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 interrelate

Course topics are continued on the next 3 pages

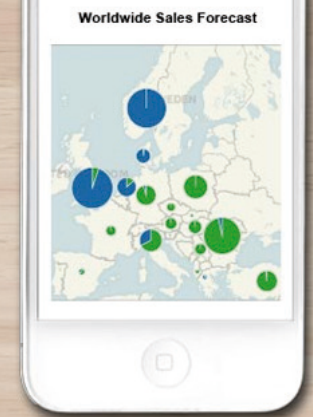


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Course Topics: (cont...)

Working with Data

In the Fundamentals class, we accepted the data for what it is! (with a basic overview of blending and joining data and working with the data engine).

In the Advanced class, we will understand the difference between joining and blending data, and when we should do each.

We will also consider the implications of working with large data sets, and consider options for when and how to work with extracts and the data engine.

We will also investigate best practices in “sharing” data sources for Tableau Server users.

- + Data Types and Roles
 - » Dimension versus Measures
 - » Data Types
 - » Discrete versus Continuous
 - » The meaning of pill colours
- + 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 metadata via shared Data Source connections
- + Performance considering and working with big data
- + OLAP considerations (overview)

Working with Calculated Data and Statistics

In the Fundamentals Class, we were introduced to some basic calculations: basic string and arithmetic calculations and ratios and quick table calculations.

In the Advanced class, we will extend those concepts to understand the intricacies of manipulating data within Tableau

- + 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
 - » Cohort Analysis
- + Working with Dates and Times
 - » Continuous versus Discrete Dates
 - » Dates and Times
 - » Reference Dates

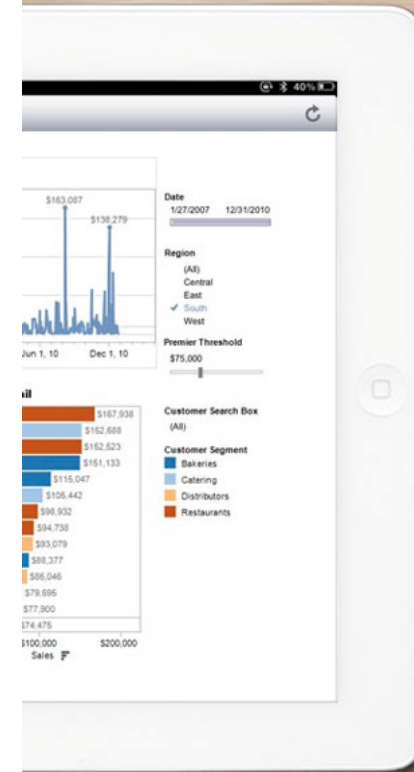
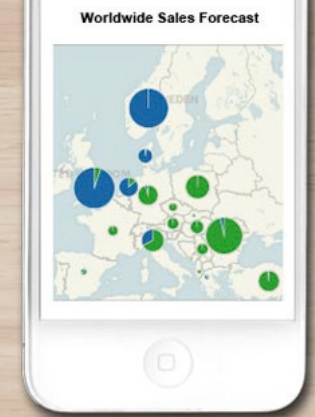


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Course Topics: (cont...)

Advanced Mapping

The Fundamentals class taught us the basics of Geographic Mapping.

In the Advanced Class, we will learn the intricacies of working with the mapping function within Tableau including working with custom geographies and geo-coding, working with an alternate WMS server and spatially visualising non-geographic data.

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

Working with Parameters

In the Fundamentals class, we were introduced to parameters. How to create a parameter and use it in a calculation. In the Advanced class, we will go into more details on how we can use parameters to modify our title, create What-If analysis, etc

- + 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 Visualisations / Tips

This topic covers how to create some of the chart types and visualisations that may be less obvious in Tableau.

It also covers some of the more common tips & tricks / techniques that we use to assist customers in solving some of their more complex problems.

- + 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
 - » Fill 100% Black Line
 - » Highlighting
 - » Labeling
 - » Legends
 - » Working with Nulls
 - » Table Options
 - » Annotations and Display Options
- + Introduction to Visualisation Best Practices

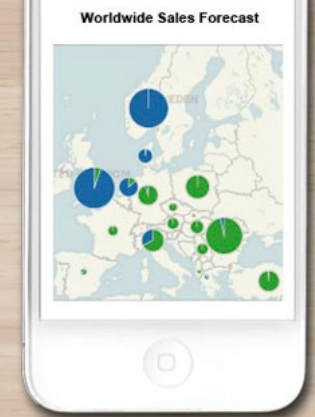


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Course Topics: (cont...)

Building Better Dashboards

In the Fundamentals courses, we learned how we can combine several worksheets in a dashboard and publish that to the web.

In the Advanced course, we will learn how to build effective and interactive applications via dashboarding.

- + 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

Overview – Working with Tableau Server

In Tableau Fundamentals, we saw that we could use Tableau Server as a mechanism to share our visualisations and dashboards. Now we will dig in a bit deeper.

- + Publishing to Tableau Server – Overview of publishing, scheduling & security options
- + Tableau Server Usage – Interacting with Published Visualisations

Wrap Up Activities

- + Summary of what we have learned
- + Advanced activities to pull together and solidify the concepts

Where to get Further Assistance

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

Tableau Jedi Status Awaits

Graduate from the Tableau advanced training and you will possess a superhuman capacity for building visualisations, dashboards and workbooks giving your organisation a whole new level of enhanced insight.

With our accredited Tableau trainers at your side, the knowledge and techniques you will gather will build on what you've already achieved to gain greater clarity and improve Tableau performance across the team. As you share your wisdom and implement better dashboards you'll taken another step closer to becoming a Tableau Jedi.

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