

Tableau Fundamentals Course

Course Duration: 2 Days | Prerequisites: None



First Steps to a Brighter World

Official Tableau Fundamentals training is designed for beginner to intermediate level Tableau user. It is for anyone who works with data, regardless of technical or analytical background. No matter the skill level all attendees will complete the course with a wealth of new skills.

In just two days attendees will have learned important concepts and techniques used in Tableau, to move from simple to complex visualisations and learn how to combine them in interactive dashboards.

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 visualisations
- › 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 the following visualisation types:
 - › Geographic Map
 - › Page Trails
 - › 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
- › Understand 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 visualisations
- › 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 visualisations with others
- › Combine your visualisations into interactive dashboards and publish them to the web

Hands-on Learning:

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

The course topics are covered in the next 2 pages

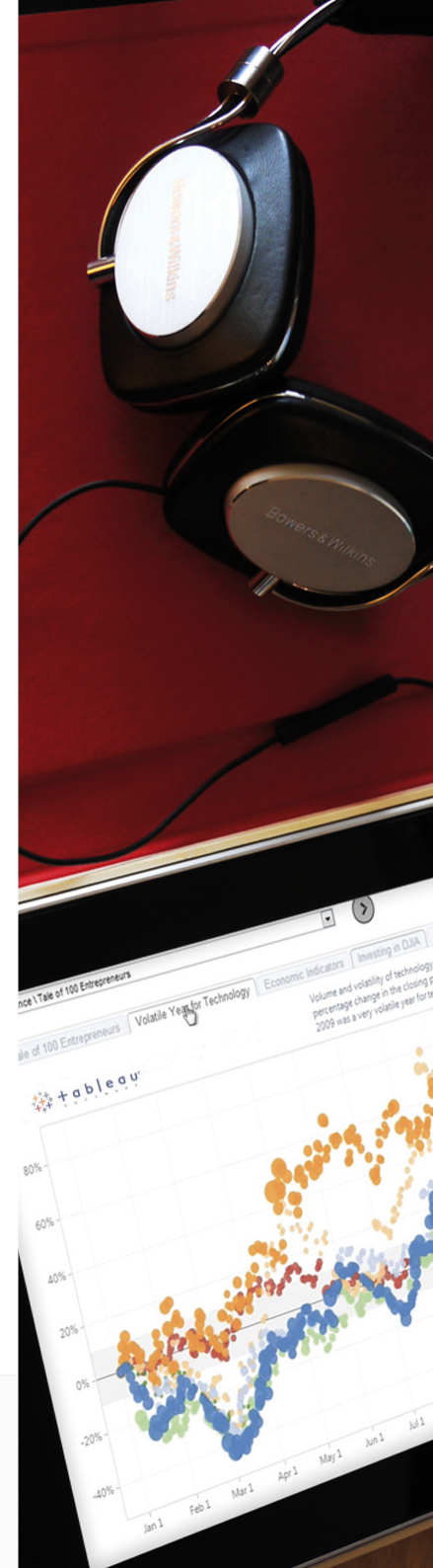


Tableau Fundamentals Course



Course Topics:

Introduction and Overview

- › Why Tableau? Why Visualisation?
- › Level Setting – Terminology
- › Getting Started – creating some powerful visualisations 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

- › 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
- › Analysing
 - » 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

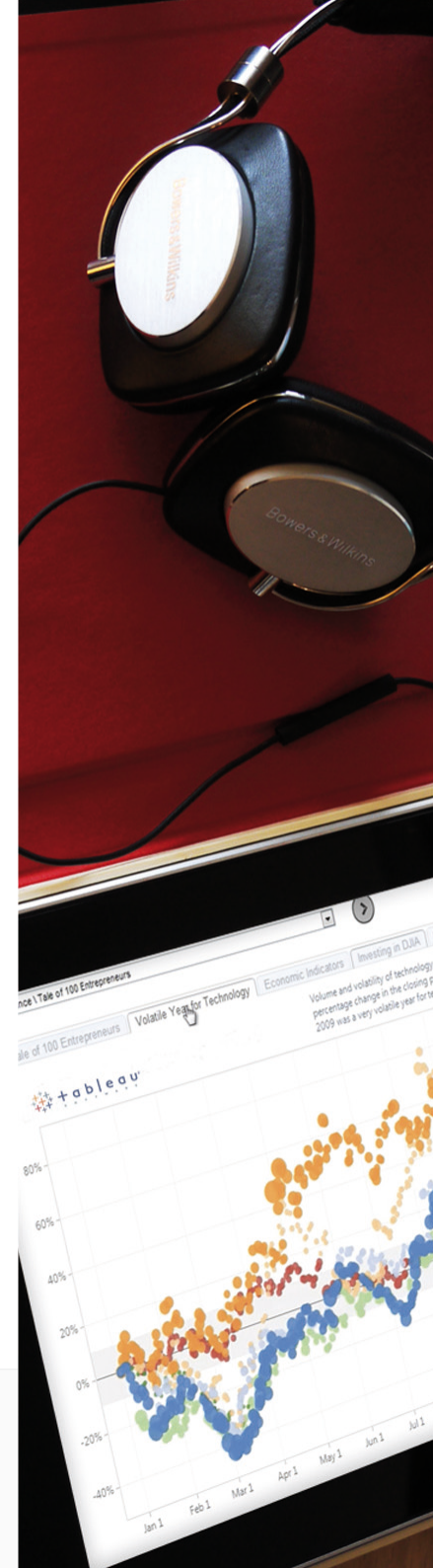


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Course Topics: (cont...)

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 Visualisation
- › Working with Labels and Annotations
- › Effective Use of Titles and Captions
- › Introduction to Visual Best Practices

Building Interactive Dashboards

- › Combining multiple visualisations into a dashboard
- › Making your worksheet interactive by using actions and filters
- › An Introduction to Best Practices in Visualisation

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 built in Desktop Help File / Product Manual
- › Knowledge base
- › Forums
- › Whitepapers & Books
- › Further Training Offerings & Professional Services
- › Technical Support

*“ It's only day one
and already my mind is blown... ”*

Gary McNamara - Group Promotions

Your Journey Starts Here

Completing Tableau official training will change your career forever. What you will learn from our Tableau accredited trainers who will transform you into a data rockstar. You will deliver better, faster more informative dashboards in less time.

You'll be equipped to provide real insight to your organisation and share your knowledge with colleagues to empower them to create better visualisations for better decision making.

Data greatness beckons. Contact your account manager to sign up.

Contact us Today

