

Exploring Tableau Desktop (Level 1)

Course Summary

Description

This two-day instructor led course will introduce Tableau Desktop software to help you quickly and creatively visualize data from both on premise and cloud data sources.

Objectives

After taking this course, students will be able to:

- Identify appropriate chart and data visualization types for specific data source scenarios
- Design fundamental charts and graphs
- Create introductory calculations
- Generate basic geographic maps
- Combine multiple worksheets into an interactive dashboard or data story

Topics

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| • Tableau and Data Visualization | • Quick Table Calculations |
| • Filtering | • Interactive Dashboards |
| • Geographic Mapping | • Guided Analysis with Stories |
| • Date/Time Analysis | • Customizing the Data Source (optional) |
| • Customized Calculations | • Additional Chart Types |

Audience

The primary audience for this course consists of anyone in an organization or company who wishes to perform personal data analysis on a cloud or on premise data source. Participants DO NOT need an IT background to be successful with Tableau.

Prerequisites

Before taking this course, participants should have a basic familiarity with introductory data source concepts (tables, rows/columns, records/fields).

Duration

Two days

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Course Outline

I. Tableau and Data Visualization

- A. What is Data Visualization
- B. Analyze Existing Tableau Workbooks
- C. Create a New Workbook
- D. Using Show Me
- E. Sharing Tableau Workbooks

II. Filtering

- A. Keep Only and Exclude
- B. The Filters Shelf
- C. Interactive Filters
- D. Filter Scope

III. Geographic Mapping

- A. Geographic Dimensions/Geocoding
- B. Latitude/Longitude Combined with Background Maps
- C. Symbol Maps
- D. Filled Maps
- E. Map Layers

IV. Date/Time Analysis

- A. Navigating Date Hierarchies
- B. Discrete/Continuous Dates
- C. Date Filters

V. Customized Calculations

- A. Ad-Hoc Versus the Calculation Editor
- B. Parts of Calculated Fields
- C. Calculated Field Data Types
- D. Aggregation Options

VI. Quick Table Calculations

- A. "Second Pass" Table Calculations
- B. Table Calculation Scope and Direction

VII. Interactive Dashboards

- A. Setting Dashboard Size
- B. Adding Worksheets
- C. Customizing Legend and Filter Appearance
- D. Dashboard Interactivity

VIII. Guided Analysis with Stories

- A. Setting Story Size
- B. Adding Worksheets, Dashboards, and Text to Story Points
- C. Modifying Sheet State
- D. Formatting Stories

IX. Customizing the Data Source (optional)

- A. Joining Tables
- B. Data Pane Customization
- C. Saving Custom Data Sources

X. Additional Chart Types

- A. Measure Names/Measure Values
- B. Show Me Charts
 - 1. Text Tables
 - 2. Heat Maps
 - 3. Horizontal Bar
 - 4. Stacked Bar
 - 5. Side-By-Side Bar
 - 6. Treemap
 - 7. Circle View
 - 8. Lines
 - 9. Dual Combination
 - 10. Scatter Plot
 - 11. Histogram
 - 12. Box and Whisker Plot
 - 13. Gantt View
 - 14. Bullet Graph
 - 15. Packed Bubble