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+ + + tableau®
+ + + S O F T W A R E

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   - Scatter plots
  - Geographic maps   - Pie and bar charts
  - Motion charts   - Small multiples
  - Heat maps   - Density charts
  - Tree maps   - Highlight tables
  - Different mark types on dual axis/combo charts
  - Drill down/drill across on dashboards

+ 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 and Getting Started
+ Tableau Desktop's role in the Tableau product line
+ Application terminology
+ View terminology
+ Data terminology
+ Visual cues for fields

Best Practices in Connecting to Data
+ Working with meta data
+ What happens when the data source changes?
+ Overview of other connection options

Working with Data
+ Filtering your data
+ The value of using a heat map
+ Sorting
+ Building groups
+ Building hierarchies
+ Sets
+ Combined sets
+ In and out sets

Working with Special Field Types
+ Data fields
+ Measure Values and Measure Names
+ Latitude and longitude (generated)

Building Visualizations
+ Combo Charts (bar and line or mixed mark)
+ Highlight table
+ Bins, histograms, calculated bins
+ Tree maps
+ Motion charts
+ Working with shapes and marks

Building Custom Calculations
+ Overview of calculations and the calculation engine
+ Manipulating strings and date calculations
+ Calculations and aggregations
+ Logic statements
+ Grand totals, sub-totals and changing aggregation
+ Creating quick table calculations

Introduction to Parameters

Statistical Visual Analysis
+ Reference lines/bands/distributions
+ Trend modeling and forecasting
+ Forecasting

Building Dashboards
+ Overview of dashboards
+ Building your first dashboard

Making Applications Interactive by Using Actions
+ What is an action?
+ Options for running actions
+ Highlight actions
+ Filter actions
+ URL actions

Options for Sharing Work
+ Tableau Packaged Workbooks
+ Publishing to Tableau Server (Web)
+ Publishing to Tableau Reader
+ Publishing to Tableau Public
+ Publishing to PDF
+ Exporting to an image file
+ Exporting the data only

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