

Tableau Desktop Level 1 Introduction

Duration 2 Days

Overview

Tableau has for some time been one of the most popular Business Intelligence and data visualization tools available. Why? Because, quite simply, it's a tool that's responsive to the needs of modern businesses. But it's most effective when you know how to get what you want from it – it might make your business intelligent, but it isn't going to make you intelligent...

We'll make sure you're well prepared to take full advantage of Tableau's features. Whether you're an experienced data analyst that wants to explore 2016's new Tableau, or you're a beginner that wants to expand their skillset and bring a more professional and sharper approach to their organization, we've got you covered. Beginning with the fundamentals, such as data preparation, you'll soon learn how to build and customize your own data visualizations and dashboards, essential for high-level visibility and effective data storytelling. You'll also find out how to do trend analysis and forecasting using clustering and distribution models to inform your analytics.

But it's not just about you – when it comes to data it's all about availability and access. That's why we'll show you how to share your Tableau visualizations. It's only once insights are shared and communicated that you – and your organization – will start making smarter and informed decisions. And really, that's exactly what this guide is for.

Audience

This two-day course is designed for the beginner Tableau user. It will help you understand and use the basic techniques for creating visualizations and combining them in interactive dashboards.

Prerequisites

Before attending this course, students should have experience using Microsoft Excel.

Course Outline

1. Introduction to Business Intelligence

- Overview of BI
- Overview of Tableau Environment
- Putting it all together

2. Data Connections

- Getting to data from Tableau Desktop
- Learning the basics of visualizing data
- Visualizing business needs

3. Transforming Data

- Why transform data?
- Data Blends
- Data Joins

4. Calculations in Tableau

- Data Aggregates
- Calculation Wizards
- Table Calculations
- Customized Calculations

5. Advanced Calculations

- Strings
- Floor and Ceiling
- Dates

6. Parameters and Filters

- Basics of Filtering
- Basics of Parameters
- Putting it all together

7. Sorting

- Ascending and Descending Order manually
- Computes and Sorting
- Nested Sorting

8. Grouping Techniques

- Sets
- Combining Fields

9. Formatting

- Colors
- Custom Colors
- Highlighters

10. Map Basics

- Layers
- Editing
- Customizing

11. Visualizations

- Understanding Charts
- Text Charts
- Visual Charts
- Time Charts
- Trend Charts

12. Introduction to Dashboards

- Designing
- Actions
- Stories

13. Server Deployment (Demo Only)

- What is Tableau Server?
- Working with Users

- Working with Projects
 - Working with Groups
 - Publishing Data Sources
 - Publishing Visualizations
 - Securing Projects
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