Tableau Desktop I: Fundamentals

Course Overview

This course is designed for Tableau beginners. It's for anyone who works with data, regardless of technical or analytical background. If you're an author, analyst, designer, data scientist, or admin new to Tableau, start here. This course accommodates authoring in Tableau Desktop, Tableau Cloud, and Tableau Server.

When you complete this course, you will be able to:

- Connect to data and edit a data source.
- Sort, filter, and group data.
- Use the Tableau workspace to create visualizations.
- Build a range of essential chart types for analysis.
- Create basic calculations, including quick table calculations.
- Build interactive dashboards to reveal data insights.
- Describe how to share and publish visualizations.

Target Audience

Administrator
Architect
Business Analyst
Consultant
Designer
End User
Marketer

Course Objectives

- Introduction
- Connecting to data
- Simplifying and sorting your data
- Organizing your data
- Slicing your data by date
- Using multiple measures in a view
- Showing the relationship between numerical values
- Mapping data geographically
- Viewing specific values
- Customizing your data
- Analyzing data with quick table calculations
- Showing breakdowns of the whole
- Viewing distributions
- Highlighting data with reference lines
- Making your views available

Duration

2 Days

Certifications

Tableau Desktop Fundamentals

Contact Us

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Course Outline

Introduction to Tableau
- The Tableau Platform
- Application Terminology
- Visual Cues for Fields
- Understanding Permissions in Tableau
- Navigating a Tableau Site

Tableau Workflow
- Understanding the Tableau Workflow
- Elements of a Visualization
- Getting Started in Tableau

Setting Up Connections and Data Sources
- Tableau File Types and Extensions
- Creating a Live Data Connection
- Saving and Editing a Data Source
- Modifying Data Attributes
- Understanding Changes to Data

Simplifying and Sorting Your Data
- Data Filtering
- Creating Date Filters
- Sorting

Organizing Your Data
- Using Groups
- Creating and Using Hierarchies

Viewing Specific Values
- Creating Crosstabs
- Grand Totals, Subtotals, and Changing Aggregation
- Creating Highlight Tables

Slicing Your Data by Date
- Working with Dates in Tableau
- Using Discrete Date Parts and Continuous Date Values
- Using Multiple Measures in a View
- Using Measure Values and Measure Names in a View
- Combined or Shared Axis Charts
- Creating Dual Axis Charts

Showing the Relationship Between Numerical Values
- Showing Correlations and Outliers with Scatter Plots
- Create a Scatter Plot
- Analyze Using the Highlighter
- Analyze an Outlier Using Explain Data
- Using the Analytics Pane
- Trend Lines and Trend Model
- Reference Lines and Bands

Mapping Data Geographically
- Mapping in Tableau
- Navigation and Selection in Maps

Customizing Your Data
- Using Calculations in Tableau
- Calculation Types
- Creating and Editing Calculated Fields
- Formula Editor Conventions
- Types of Calculated Fields - Examples
- Calculations and Aggregations
- String Functions
- Split and Custom Split
- Type Conversions
- Date Calculations - Examples

Analyzing Data with Quick Table Calculations
- Table Calculation Overview
- Using Quick Table Calculations
- Using Rank to Show Biggest to Smallest

Showing Breakdowns of the Whole
- Pie Charts and Parts of the Whole
- Creating Tree Maps

Making Your Views Available
- Dashboards
- Dashboard Actions
- Publish Your Dashboard Online