

# **Tableau for Beginners**

**Duration: 2 Days**

## **Overview:**

This course covers data visualization through Tableau and helps you create opportunities for you or key decision-makers to discover data patterns such as customer purchase behaviour, sales trends, or production bottlenecks. You'll learn all the features in Tableau that allow you to explore, experiment with, fix, prepare, and present data easily, quickly, and beautifully.

## **Course Objectives:**

In this course, you will learn:

- Tableau Basics
- Find trends in your data and make accurate forecasts
- How to use aggregations to summarize information
- How to create various charts, maps, scatterplots, and interactive dashboards
- Identify whether to join or blend data
- Advanced features of data preparation in Tableau

## **Course Content:**

### Lesson 1: Introduction to Tableau

- What is Tableau
- Installation

### Lesson 2: Tableau Basics

- The business challenge
- Connecting Tableau to a Data File - CSV File
- Navigating Tableau
- Creating Calculated Fields
- Adding Colors
- Adding Labels and Formatting
- Exporting your worksheet

### Lesson 3: Time Series, Aggregation and Filters

- Data Extracts in Tableau
- Time Series
- Understanding Aggregation, Granularity, and Level of Detail
- Creating an Area Chart & Highlighting
- Adding a Filter and Quick Filter

### Lesson 4: Maps, Scatterplots and Dashboards

- Relationships vs Joins

- Joining Data in Tableau
- Creating a Map, Working with Hierarchies
- Creating a Scatter Plot, Applying Filters to Multiple Worksheets
- Create your First Dashboard
- Adding an Interactive Action – Filter
- Adding an Interactive Action - Highlighting

#### Lesson 5: Joining, Blending and Relationships

- Understanding how LEFT, RIGHT, INNER, and OUTER Joins Work
- Joins With Duplicate Values
- Joining on Multiple Fields
- Joining Data vs. Blending Data in Tableau
- Data Blending in Tableau
- Dual Axis Chart
- Creating Calculated Fields in a Blend
- The Data Model
- Working with Relationships in Tableau

#### Lesson 6: Table Calculations, Advanced Dashboards, Storytelling

- Connecting Data to Tableau
- Mapping: how to Set Geographical Roles
- Creating Table Calculations for Gender
- Creating Bins and Distributions for Age
- Leveraging the Power of Parameters
- How to Create a Tree Map Chart
- Creating a Customer Segmentation Dashboard
- Advanced Dashboard Interactivity
- Analysing the Customer Segmentation Dashboard
- Creating a Storyline

#### Lesson 7: Advanced Data Preparation

- What Format Your Data Should Be In
- Data Interpreter
- Pivot
- Splitting a Column into Multiple Columns
- MetaData Grid
- Fixing Geographical Data Errors in Tableau

#### Lesson 8: Clusters, Custom Territories, Design features

- Custom Territories Via Groups
- Custom Territories Via Geographic Roles
- Adding a Highlighter
- Clustering In Tableau
- Cross-Database Joins

- Modelling With Clusters
- Saving Your Clusters
- New Mobile Features

#### Lesson 9: Tableau Toolkit

- Data from PDF Files
- Connecting to PDF
- Connecting to Spatial Files
- Joining to Spatial Files
- Putting it All Together
- Step and Jump Line Chart
- Viz in Tooltip