Tableau Desktop: Part One

Days: 2

Prerequisites: To ensure your success in this course, you should have experience in working with data in spreadsheet format, such as in Microsoft® Excel® or Google Sheets™, which you could obtain by taking these courses:

- *Microsoft® Excel® for Office 365™ (Desktop or Online): Part 1 or Microsoft® Office Excel® 2021: Part 1*

- *Microsoft® Excel® for Office 365™ (Desktop or Online): Part 2 or Microsoft® Office Excel® 2021: Part 2*

Optionally, having experience with other data analytics tools, such as Google Analytics™ or Customer Relationship Management (CRM) tools, as well as an understanding of database design concepts or a background in statistical analysis, will help you get even more out of Tableau. The following courses are helpful but not required:

- *Database Design: A Modern Approach*

- *Microsoft® Excel® for Office 365™/2019/2021: Dashboards*

Audience: This course is designed for professionals in a variety of job roles who are currently using desktop or web-based data-management tools to perform numerical or general data analysis. This includes capturing and reporting on data to peers, executives, and clients. These professionals must also provide data visualizations in reports or explain data analysis through visualizations.

This course is also designed for students who plan to obtain the Tableau Desktop Specialist certification, which requires candidates to pass the Tableau Desktop Specialist exam, or the Tableau Certified Data Analyst certification, which requires candidates to pass the Tableau Certified Data Analyst exam.

Description: As technology progresses and becomes more interwoven with our businesses and lives, more and more data is collected about business and personal activities. This era of "big data" has exploded due to the rise of cloud computing, which provides an abundance of computational power and storage, allowing organizations of all sorts to capture and store data. Leveraging that data effectively can provide timely insights and competitive advantage.

The creation of data-backed visualizations is a key way data scientists, or any professional, can explore, analyze, and report insights and trends from data. Tableau® software is designed for this purpose. Tableau was built to connect to a wide range of data sources and allows users to quickly create visualizations of connected data to gain insights, show trends, and create reports. Tableau's data connection capabilities and visualization features go far beyond those that can be found in spreadsheets, allowing users to create compelling and interactive worksheets, dashboards, and stories that bring data to life and turn data into thoughtful action.

Course Objectives: In this course, you will visualize data with Tableau. You will:
- Identify and configure basic functions of Tableau.

- Connect to data sources, import data into Tableau, and save Tableau files.

- Create views and customize data in visualizations.

- Manage, sort, and group data.

- Save and share data sources and workbooks.

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- Filter data in views.

- Customize visualizations with annotations, highlights, and advanced features.

- Create and enhance dashboards in Tableau.

- Create and enhance stories in Tableau.

OUTLINE:

LESSON 1: TABLEAU FUNDAMENTALS
- Topic A: Overview of Tableau
- Topic B: Navigate the Tableau Desktop Interface

LESSON 2: CONNECTING TO AND PREPARING DATA
- Topic A: Connect to Data
- Topic B: Save Workbook and Extract Files
- Topic C: Build a Data Model
- Topic D: Prepare Data for Analysis

LESSON 3: EXPLORING DATA WITH VIEWS AND VISUALIZATIONS
- Topic A: Create Views and Visualizations
- Topic B: Edit Visualizations to Support Data Analysis
- Topic C: Create and Use Hierarchies
- Topic D: Perform Quick Table Calculations

LESSON 4: MANAGING, SORTING, AND GROUPING DATA
- Topic A: Manage Fields
- Topic B: Sort Data
- Topic C: Group Data

LESSON 5: SAVING, PUBLISHING, AND SHARING DATA
- Topic A: Save Data Sources
- Topic B: Publish Data Sources and Visualizations
- Topic C: Share and Publish Workbooks

LESSON 6: FILTERING DATA
- Topic A: Configure Basic Filters
- Topic B: Configure Advanced Filter Options
- Topic C: Create Interactive Filters

LESSON 7: CUSTOMIZING VISUALIZATIONS
- Topic A: Format and Annotate Views
- Topic B: Emphasize Data in Visualizations
- Topic C: Create Animated Workbooks
- Topic D: Best Practices for Visual Design

LESSON 8: CREATING DASHBOARDS IN TABLEAU
- Topic A: Create Dashboards
- Topic B: Enhance Dashboards with Actions
- Topic C: Create Mobile Dashboards

LESSON 9: CREATING STORIES IN TABLEAU
- Topic A: Create Stories
- Topic B: Enhance Stories with Tooltips

APPENDIX A: MAPPING COURSE CONTENT TO TABLEAU® DESKTOP SPECIALIST EXAM OBJECTIVES

APPENDIX B: MAPPING COURSE CONTENT TO TABLEAU® CERTIFIED DATA ANALYST EXAM OBJECTIVES