

Course duration

- 2 days

Course Benefits

- Navigate the Tableau Desktop user interface
- Connect to Data Sources
- Create simple visuals
- Analyze data using filters, hierarchies, groups, sets, and sorting
- Create calculations
- Share data with others

Available Delivery Methods

Public Class

Public expert-led online training from the convenience of your home, office or anywhere with an internet connection. Guaranteed to run .

Private Class

Private classes are delivered for groups at your offices or a location of your choice.

Course Outline

1. Introduction to Tableau
 1. What is Tableau?
 2. Tableau Terminology
 3. User Interface Layout
 4. Build your First View
2. Connecting to Data
 1. Tableau Ready Data Files
 2. Data Source Connectors
 3. Data Source Page
 4. Data Extract (TDE vs HYPER)
 5. Save Data Source
 6. Close Data Source
3. Understanding Data Fields
 1. Data Types
 2. Data Roles

- 3. Tableau-Generated Fields
 - 4. Special Values
- 4. Analyzing Data
 - 1. Filters
 - 2. Highlighters
 - 3. Sorting
 - 4. Hierarchies
 - 5. Groups
 - 6. Sets
- 5. Calculations
 - 1. Calculation Types
 - 2. Formula Editor
 - 3. Quick Editor
 - 4. Operators and Precedence
 - 5. String and Date Calculations
 - 6. Logic Statements
 - 7. Totals
 - 8. Quick Table Calculations
- 6. Charts
 - 1. Highlight Table
 - 2. Bar Chart
 - 3. Text Table
 - 4. Line Chart
 - 5. Combined Charts
 - 6. Histogram
 - 7. Pie Chart
 - 8. Treemap
 - 9. Heat Map
 - 10. Scatter Plots
 - 11. Motion Chart
- 7. Formatting
 - 1. Visual Best Practices
 - 2. General Formatting
 - 3. Workbook Formatting
 - 4. Mark Labels
 - 5. Reference Lines
- 8. Parameters
 - 1. Overview of Parameters
 - 2. Using Parameters
- 9. Dashboards
 - 1. Overview of Dashboards
 - 2. Building a Simple Dashboard
 - 3. Actions
- 10. Story Points
 - 1. Overview of Story Points
 - 2. Create a Story
 - 3. Fit Visuals to Story

4. Annotate a Story
5. Update a Story
11. Saving, Exporting, and Publishing
 1. Publish Workbooks
 2. Save and Export Workbooks
 3. Create a PDF
 4. Save and Use Image in External Application
 5. Publish Data Source
 6. Downgrading the Workbook Version

Class Materials

Each student will receive a comprehensive set of materials, including course notes and all the class examples.

Class Prerequisites

Experience in the following *is required* for this Tableau class:

- Experience managing data with Microsoft® Excel or Google Sheets.

Follow-on Courses

- [Advanced Tableau Desktop](#)