



## TABLEAU Training COURSE CONTENT

### Tableau Architecture

#### Connecting to & Preparing Data

- Create and save data connections
- Create a live connection to a data source
- Explain the differences between using live connections versus extracts
- Create an extract
- Save metadata properties in a .TDS

#### Modify data connections

- Add a join
- Add a blend
- Add a union

#### Manage data properties

- Rename a data field
- Assign an alias to a data value
- Assign a geographic role to a data field
- Change data type for a data field (number, date, string, Boolean, etc.)
- Change default properties for a data field (number format, aggregation, color, date format, etc.)

#### Exploring & Analyzing Data

- Create basic charts
- Create a bar chart
- Create a line chart
- Create a scatterplot
- Create a map using geographic data
- Create a combined axis chart
- Create a dual axis chart
- Create a stacked bar
- Create a chart to show specific values (crosstab, highlight table)

#### Organize data and apply filters

- Create a visual group
- Create a group using labels
- Create a set
- Organize dimensions into a hierarchy
- Add a filter to the view
- Add a context filter
- Add a date filter

#### Apply analytics to a worksheet

- Add a manual or a computed sort
- Add a reference line or trend line
- Use a table calculation



Use bins and histograms

Create a calculated field (e.g. string, date, simple arithmetic)

Add a parameter

Sharing Insights

Format view for presentation

Use color

Use bolding

Use shapes

Use viz animations

Change size of marks

Select fonts

Create and modify a dashboard

Create a dashboard layout

Add interactive or explanatory elements

Add dashboard actions

Modify existing dashboard layout for mobile devices

Create a story using dashboards or views

Share a twbx as a PDF

Share a twbx as an image

Understanding Tableau Concepts

Dimensions and measures

Explain what kind of information dimensions usually contain

Explain what kind of information measures usually contain

Discrete and continuous fields

Explain how discrete fields are displayed in Tableau

Explain how continuous fields are displayed in Tableau

Explain the difference between discrete date parts and continuous date values in Tableau

Aggregation

Explain why Tableau aggregates measures

Describe how an aggregated measure changes when dimensions are added to the view