

Tableau Desktop

Length: 4 Days

Summary: Tableau has for some time been one of the most popular Business Intelligence and data visualization tools available. Why? Because, quite simply, it is a tool that is responsive to the needs of modern businesses. But it's most effective when you know how to get what you want from it – it might make your business intelligent, but it isn't going to make you intelligent...

We will make sure you are well prepared to take full advantage of Tableau 10's new features. Whether you are an experienced data analyst that wants to explore 2016's new Tableau, or you are a beginner that wants to expand their skillset and bring a more professional and sharper approach to their organization, we have got you covered. Beginning with the fundamentals, such as data preparation, you will soon learn how to build and customize your own data visualizations and dashboards, essential for high-level visibility and effective data storytelling. You will also find out how to do trend analysis and forecasting using clustering and distribution models to inform your analytics.

You will be armed with an arsenal of advanced chart types and techniques to enable you to efficiently and engagingly present information to a variety of audiences through the use of clear, efficient, and engaging dashboards. Explanations and examples of efficient and inefficient visualization techniques, well-designed and poorly designed dashboards, and compromise options when Tableau consumers will not embrace data visualization will build on your understanding of Tableau and how to use it efficiently.

Features

- Create stylish visualizations and dashboards that explain complexity with clarity
- Learn effective data storytelling to transform how your business uses ideas and makes decisions
- Explore all the new features in Tableau 10 and start to redefine what business analytics means to your organization
- Arm yourself with an arsenal of advanced chart types and geocoding to efficiently and engagingly present information
- Map a grid over a network node diagram and use that grid to demonstrate loads, processing time, and more in Tableau

Learning

- Find out how to build effective visualizations and dashboards
- Prepare and clean your data so you can be sure Tableau is finding answers to your questions – not raising more problems
- Discover how to create advanced visualizations that explain complexity with clarity and style
- Dig deeper into your data with clustering and distribution models that allow you to analyze trends and make forecasts
- Learn how to use data storytelling to aid decision-making and strategy
- Share dashboards and visualizations to cultivate a culture where data is available and valued
- Create a worksheet that can display the current balance for any given period in time
- Recreate a star schema from in a data warehouse in Tableau
- Combine level of detail calculations with table calculations, sets, and parameters
- Create custom polygons to build filled maps for area codes in the USA
- Visualize data using a set of analytical and advanced charting techniques
- Know when to use Tableau instead of PowerPoint
- Build a dashboard and export it to PowerPoint

Version: This course will be taught with the Version 10 course materials and software. Users of Tableau Version 9 will feel comfortable in the class because the user interface is very similar between versions 9 and 10.

Audience: This course is designed for the beginner Tableau user. It will help you understand and use the basic techniques for creating visualizations and combining them in interactive dashboards. This course is taught using Tableau version 10 software. However, the class is appropriate for users of version 9 and the instructor will highlight the minor differences between the two versions.

Prerequisites: Before attending this course, students should have experience using Microsoft Excel.

COURSE CONTENT

INTRODUCTION TO BUSINESS INTELLIGENCE

- Overview of BI
- Overview of Tableau Environment
- Putting it all together

DATA CONNECTIONS

- Getting to data from Tableau Desktop
- Learning the basics of visualizing data
- Visualizing business needs

TRANSFORMING DATA

- Why transform data?
- Data Blends
 - Data Joins

CALCULATIONS IN TABLEAU

- Data Aggregates
- Calculation Wizards
- Table Calculations
- Customized Calculations

ADVANCED CALCULATIONS

- Strings
- Floor and Ceiling
- Dates

PARAMETERS AND FILTERS

- Basics of Filtering
- Basics of Parameters
- Putting it all together

SORTING

- Ascending and Descending Order manually
- Computes and Sorting
- Nested Sorting

GROUPING TECHNIQUES

- Sets
- Combining Fields

FORMATTING

- Colors
- Custom Colors
- Highlighters

MAP BASICS

- Layers
- Editing
- Customizing

VISUALIZATIONS

- Understanding Charts
- Text Charts
- Visual Charts
- Time Charts
- Trend Charts

INTRODUCTION TO DASHBOARDS

- Designing
- Actions
- Stories

CHART TYPES

- Manually Creating and Editing Charts
- Chart Enhancements
- Advanced Techniques with Various Charts

TIPS AND TRICKS

- Icon Navigation
- What-If Analysis
- Alerts on Dashboards
- Custom Shapes
- Google Analytics
- Conditional Formatting
- Level of Detail Expressions
- Device Specific Dashboards
- Time Choices
- Beautiful charts

MORE CHARTS

- Creating a bar chart
- Creating a stacked bar chart
- Creating a line chart
- Creating a scatter plot
- Creating a heat map
- Creating a text table (crosstab)
- Creating a highlight table
- Creating an area chart
- Creating a pie chart
- Creating a bubble chart
- Creating a word cloud
- Creating a tree map

ADVANCED CHARTS

- Introduction Creating a histogram
- Creating a small multiple chart
- Creating a shared axis chart
- Creating a combo chart (dual axis chart)
- Creating a bullet chart
- Creating a bar in bar chart
- Creating a donut chart
- Creating a unit chart
- Creating a box and whisker chart
- Creating a sparkline with indicators
- Creating a KPI text table
- Creating a waterfall chart
- Creating a population pyramid

INTERACTIVITY

- Introduction
- Creating a motion chart
- Creating a dynamic column/row trellis chart
- Creating a top/bottom N filter
- Comparing one to everything else
- Dynamically displaying dimensions
- Dynamically displaying and sorting measures
- Creating a custom date period filter

DASHBOARDS AND STORY POINTS

- Introduction
- Creating a filter action
- Creating a highlight action
- Creating a URL action
- Creating an Infographic-like dashboard
- Creating story points

MAPS AND GEOSPATIAL VISUALIZATION

- Introduction
- Adding data layers to map
- Creating custom territories
- Working with Web Map Service (WMS)
- Using path to display movement in map Mapping custom polygons
- Importing custom geocoding Using a custom image background

ANALYTICS

- Introduction
- Adding a constant line
- Adding a trend line Using a reference line
- Adding a reference band
- Performing cluster analysis Visualizing forecast
- Performing linear regression with R

DATA PREPARATION

- Introduction
- Using the Data Interpreter and pivot
- Using the legacy Jet driver
- Using schema.ini to resolve data type issues Pivoting columns
- Using union Using join Using blend