



Tableau Fundamental Concepts

- ✓ What is data visualization?
- ✓ Purpose of data visualization
- ✓ Introduction to tableau
- ✓ What is Tableau
- ✓ Why Tableau
- ✓ About Tableau products
 - .1. Tableau Desktop
 - .2. Tableau Server
 - .3. Tableau Public

- ✓ Installation of Tableau Desktop
- ✓ Connecting to Excel Data source
- ✓ Understanding of Data window
 - .1. Dimension?
 - .2. Measure?
 - .3. Data types and Symbols

- ✓ Different ways of dragging dimensions and measures
- ✓ Sample report and dashboard
- ✓ Connecting to data source
 - .1. Connecting to single table
 - .2. Connecting to multiple tables
 - .3. Connecting using custom SQL
 - .4. Exporting or saving data connection
 - .5. Editing data connection
 - .6. Replacing data connection
 - .7. Refreshing the connection
 - .8. Extract connection
 - .9. Live vs extract
 - .10. Data Source filters
 - .11. switch to live
 - .12. Refreshing extract
 - .13. Closing data source
 - .14. Clipboard data source
 - .15. Data Blending

- ✓ Different File extension types in Tableau
 - .1. .tbn
 - .2. .twb
 - .3. .tde



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- .4. .twbx
 - .5. .tds
 - .6. .tdsx
 - .7. .tps
 - .8. .tms
- ✓ Tool bar menu icons
- .1. Undo(Ctr+Z)
 - .2. Redo(Ctr+Y)
 - .3. Save(Ctr+S)
 - .4. Connect to data(Ctr+D)
 - .5. Create new sheet or dashboard or story
 - .6. Duplicate sheet
 - .7. Clearing sheet
 - .8. Swapping
 - .9. Sorting
 - .10. Labeling(abc)
 - .11. Resetting cards
 - .12. Highlighting
 - .13. Presentation view
- ✓ Data window options
- .1. Add to sheet
 - .2. Show quick filter
 - .3. Duplicate
 - .4. Rename
 - .5. Hide
 - .6. Group by folder or data source table
 - .7. Create folder
 - .8. Change data type
 - .9. Change Geo graphic role
 - .10. Default properties
 - .11. Replace references
 - .12. Describe
 - .13. Creating calculation field
- ✓ Cross tab reports
- .1. simple cross tab report
 - .2. cross tab report with more than 6 columns
 - .3. cross tab report with more than 16 columns
 - .4. showing header for single measure cross tab report
 - .5. hiding and showing columns in cross tab report
 - .6. adding sub totals, row and column grand totals
 - .7. formatting cross tab reports
 - .8. conditional formatting in cross tab report



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- .9. KPI in cross tab reports

- ✓ Hierarchies
 - .1. Create Hierarchies
 - .2. Hierarchies in cross tab reports
 - .3. Hierarchies in charts

- ✓ Bar and Line charts
 - .1. Simple Bar chart
 - .2. Side by side Bar chart-- Grouped Bar chart--
 - .3. Staked Bar chart
 - .4. Bar with line chart (Dual axis)
 - .5. Bar with in Bar chart (Dual axis)
 - .6. About marks shelves (Color, Size, Label, Tool Tip)
 - .7. Annotations (Mark, Point and Area)
 - .8. Formatting sheets

- ✓ Worksheet options
 - .1. Renaming of sheet
 - .2. Deleting sheet
 - .3. Duplicating sheet
 - .4. Duplicating as cross tab
 - .5. Export sheet
 - .6. Copy/Paste formatting
 - .7. Copy/Paste sheets
 - .8. Show title, caption, summary options
 - .9. Describing sheet

- ✓ Filters
 - .1. Quick filters
 - .2. Filtering Dimensions
 - .3. Filtering Measures
 - .4. Range filters
 - .5. Context filters
 - .6. Filter options
 - .7. Applying filter to specific sheets
 - .8. Applying filter to data source
 - .9. Date filters
 - .10. Conditional filters
 - .11. Top filters
 - .12. Relevant filters

- ✓ Parameters
 - .1. Create parameter
 - .2. Parameter options



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- .3. Sheet selector using parameter
- .4. Selecting measure using parameter

- ✓ Sorting
 - .1. Icon Sorting
 - .2. Sorting options
 - .3. Manual sorting
 - .4. Computed sorting

- ✓ Groups
 - .1. Creating Groups
 - .2. Dynamic Groups using calculated field

- ✓ Sets
 - .1. Creating Set
 - .2. Combined Sets
 - .3. Sets in calculation field

- ✓ Table calculations
 - .1. Running Total
 - .2. Difference
 - .3. Percent Difference
 - .4. Percent of Total
 - .5. Rank
 - .6. Percentile
 - .7. Moving Average
 - .8. YTD Total
 - .9. Compound Growth Rate
 - .10. Year over Year Growth
 - .11. YTD Growth

- ✓ Bins
 - .1. Creating Bins
 - .2. Bin size with parameters
 - .3. Custom Bins

- ✓ Forecasting
 - .1. Show Forecast
 - .2. Forecast options
 - .3. Describe Forecast

- ✓ Trend lines
 - .1. Show Trend lines
 - .2. Edit Trend lines
 - .3. Describe Trend lines



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.4. Describe Trend model

✓ Reference lines

- .1. Adding reference line
- .2. Reference line per cell, per pane, entire table
- .3. Adding reference band
- .4. Formatting
- .5. Distribution
- .6. Box Plot

✓ Different types of charts in tableau

- .1. Highlight Table
- .2. Heat map
- .3. Tree map
- .4. Maps
- .5. Pie Chart
- .6. Scatter Plot
- .7. Area Chart
- .8. Babble Chart
- .9. Word Cloud
- .10. Gantt Bar Chart
- .11. Bullet Chart

✓ Dashboards

- .1. Dashboard design
- .2. Dashboard size selection
- .3. Difference between Normal, Fixed width, Fixed height and Entire view
- .4. Tiled vs Floating
- .5. Dashboard components (Horizontal, Vertical, Text, Image, Web page, Blank)
- .6. Managing dashboards and sheets
- .7. Dashboard Actions
- .8. Formatting Dashboards

ADVANCED TOPICS

Functions

✓ Number Functions

- .1. ABS
- .2. DIV



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- .3. EXP
- .4. POWER
- .5. ROUND
- .6. SIGN
- .7. SQRT
- .8. SQUARE

✓ String Functions

1. ASCII
2. CHAR
3. CONTAINS
4. ENDSWITH
5. FIND
6. LEFT
7. LEN
8. LOWER
9. LTRIM
10. MID
11. REPLACE
12. RIGHT
13. RTRIM
14. SPACE
15. STARTWITH
16. TRIM
17. UPPER

✓ Date

1. DATEADD
2. DATEDIFF
3. DATENAME
4. DATEPARSE
5. DATEPART
6. DATETRUNC
7. DAY
8. MONTH
9. NOW
10. TODAY
11. YEAR

✓ Type Conversion

1. DATE
2. DATETIME
3. FLOAT
4. INT



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5. MAKEDATETIME
6. STR

✓ Logical

1. CASE
2. IF
3. IFNULL
4. IIF
5. ISDATE
6. ISNULL
7. ZN

✓ Aggregate

1. ATTR
2. AVG
3. COUNT
4. COUNTD
5. MAX
6. MEDIAN
7. MIN
8. SUM

✓ User

1. FULLNAME
2. ISFULLNAME
3. ISMEMBEROF
4. ISUSERNAME
5. ISDOMAIN
6. USERDOMAIN
7. USERNAME

✓ Table Calculation

1. FIRST
2. INDEX
3. LAST
4. LOOKUP
5. PREVIOUS_VALUE
6. RANK
7. RANK_DENSE
8. RANK_MODIFIED
9. RANK_UNIQUE
10. RUNNING_AVG
11. RUNNING_COUNT
12. RUNNING_MAX
13. RUNNING_MIN



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- 14. RUNNING_SUM
- 15. SIZE
- 16. TOTAL
- 17. WINDOW_AVG
- 18. WINDOW_COUNT
- 19. WINDOW_MAX
- 20. WINDOW_MIN
- 21. WINDOW_SUM

✓ Table Calculations

✓ Adding Reference Line Advanced

✓ Advanced Dashboard Techniques

- 1. Advanced formatting techniques
- 2. Vertical vs Horizontal containers
- 3. Best practices
- 4. Advanced Dashboard Action

✓ Tips and Tricks

✓ Miscellaneous Topics

- 1. How to do performance recording
- 2. Adding New Color Palette
- 3. Adding New Shape Palette

✓ Tableau Desktop 9 New Features

✓ Tableau Desktop 9 LOD Calculations