

Tableau Desktop - Part 1 (2 Days)

As technology progresses and becomes more interwoven with our businesses and lives, an increasing amount of 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 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 for data scientists or any professional to explore, analyze, and report insights and trends from data. Tableau® software is designed for this purpose. Tableau connects to a wide range of data sources and allows users to quickly create visualizations to gain insights, show trends, and create reports. Tableau's data connection capabilities and visualization features go far beyond those found in spreadsheets, enabling users to create compelling and interactive worksheets, dashboards, and stories that bring data to life and turn data into thoughtful action.

Course Benefits

- 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.
- Filter data in views.
- Customize visualizations with annotations, highlights, and advanced features.
- Create and enhance dashboards in Tableau.
- Create and enhance stories in Tableau.

Class Materials

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

Class Prerequisites

Experience in managing data with Microsoft® Excel® or Google Sheets™ *is required* for this Tableau class.

Course Outline

Overview of Tableau

- Navigate and configure Tableau

Connect to data

- Build a data model
- Save workbook files
- Prepare data for analysis

Create views

- Customize data in visualizations

Adjust fields

- Sort data
- Group data

Save data sources

- Publish data sources and visualizations
- Share workbooks for collaboration

Configure worksheet filters

- Apply advanced filter options
- Create interactive filters

Format and annotate views

- Emphasize data in visualizations
- Create animated workbooks
- Best practices for visual design

Create dashboards

- Enhance dashboards with actions
- Create mobile dashboards

Create stories

- Enhance stories with tooltips