

# TABLEAU DEVELOPER: STEP BY STEP TO BETTER DATA VISUALIZATION



## Introduction

Learn how to create powerful data visualizations easily and quickly.

In this course you will develop reports and queries, and perform data analysis.

We cover the basic reporting and analysis functions that most BI users perform in their day-to-day work. These include connecting to a data source, working with dimensions and measures, developing reports and charts, saving workbooks, filtering, swapping, sorting, formatting, grouping, creating hierarchies, forecasting, exporting, distributing, as well developing various chart types.

Each exercise provides information that cover every step from start to finish. The exercises are based on a comprehensive sample Excel-based data source that Tableau Software (version 9) has provided, which makes it very easy to duplicate the exercises on the real software.

This course teaches you to:

- Execute each function in a step-by-step manner
- Work up to more advanced and complex Tableau functionality
- Integrate individual development of content, such as tables/charts and visualizations, onto a dashboard for an effective presentation

## What You'll Learn

- Connect to data sources
- Develop reports
- Create visualizations
- Perform analysis functions (e.g., filtering, drilldown, sorting, grouping, forecasting, etc.)
- Save visualizations in different formats and distribute them
- Develop dashboards and their content.

## Course Duration:

3 days

## Who This Book Is For

- Novice Tableau users
- BI end users
- Developers and Business Analysts.
- Also, students in university courses on dashboards and data visualization as well as BI and data analysis can quickly get up to speed with Tableau tools and use them for implementing the hands-on projects associated with these courses

## This Course

This Course aims to teach novices the basics of Tableau software so that they can quickly develop simple reports and visualizations.

Tableau is a very powerful software with a very rich set of features and functionality. However, to get started, users need to learn only a few key functions, which are widely used in every type of business.

This course aims to teach those basic functions through a series of exercises, which are based on step-by-step instructions. Learning these exercises will not make anyone an expert. However, they will provide enough knowledge and hands-on capability to novices so that they can quickly develop powerful and professional-looking visualizations.

With more than 40 exercises, one explains the Tableau interface, while the others provide step-by-step instructions for performing various functions.

Functions covered include swapping, sorting, drill down, grouping, hierarchies, aggregation, filtering, formatting, and trending.



The exercises show how to delete, copy, and save workbooks, export the data/results to Excel or PDF, and display the detailed underlying data. They also demonstrate analysis functions, including Top N and forecasting.

This course also contains step-by-step exercises that demonstrate how to create a dashboard, incorporate quick filters in dashboards, and use layout formatting, as well as how to cascade worksheet changes in a dashboard.

## Course Content

### Introduction

- 1: Log on to Tableau
- 2: Connecting to Two Data Sources
- 3: Exploring the Tableau Interface
- 4: Developing a Simple Visualization
- 5: Saving Tableau Workbook and Tableau Packaged Workbook
- 6: Using Basic Analysis Functions
- 7: Adding, Removing, and Renaming a Dimension
- 8: Copying or Deleting a Worksheet
- 9: Changing the Display from One Chart Type to Another
- 10: Using the Show Me Tool for Selecting a Visualization
- 11: Crosstab Display and Swapping
- 12: Sorting
- 13: More About Sorting
- 14: View Details/Underlying Data
- 15: Grouping
- 16: Building a Hierarchy

- 17: Aggregate Measures
- 18: Exclude and Keep
- 19: Filtering on the Filter Shelf
- 20: Quick Filters
- 21: Customization for Quick Filters
- 22: Quick Filters Single and Multiple Value Lists
- 23: Quick Filter Sliders
- 24: Dependency in Quick Filters
- 25: Saving in PDF Format
- 26: Exporting an Image to PowerPoint
- 27: Exporting Data
- 28: Displaying Underlying Data
- 29: Exporting Crosstab Data
- 30: Formatting
- 31: Highlighting with Colors
- 32: Axis Formatting
- 33: Formatting Tables
- 34: Top N Function
- 35: Trend Lines
- 36: Forecasting
- 37: Creating a Dashboard
- 38: Dashboard Quick Filters
- 39: Cascading Worksheet Changes in a Dashboard
- 40: Working with Dashboard Content

