



**data**   
**analytics**

## Online Training proposal



**data**   
**analytics**

  
**tableau**<sup>®</sup>  
P A R T N E R



## Table of contents

List of Tableau Desktop basic training topics (1 day) .....	2
List of Tableau Desktop training issues at intermediate and advanced level (1 day) .....	3
List of training topics for Tableau Explorer (1 day).....	4



## List of Tableau Desktop basic training topics (1 day)

<b>Introduction</b>
<ul style="list-style-type: none"><li>• introduction to Tableau Desktop and a brief overview of other Tableau products</li></ul>
<ul style="list-style-type: none"><li>• fast-track, i.e. building a dashboard in 30 minutes with a brief overview of Tableau's possibilities, ideal for beginners</li></ul>
<ul style="list-style-type: none"><li>• connection to multiple data sources and creation of a cross database joint</li></ul>
<ul style="list-style-type: none"><li>• working with metadata</li></ul>
<ul style="list-style-type: none"><li>• extracts - creation and management</li></ul>
<b>Visualizations in Tableau and practical examples of their use</b>
<ul style="list-style-type: none"><li>• column and bar charts</li></ul>
<ul style="list-style-type: none"><li>• line and surface charts</li></ul>
<ul style="list-style-type: none"><li>• scatter plot</li></ul>
<ul style="list-style-type: none"><li>• pie chart</li></ul>
<ul style="list-style-type: none"><li>• heatmap</li></ul>
<ul style="list-style-type: none"><li>• tree map</li></ul>
<ul style="list-style-type: none"><li>• bubble diagram</li></ul>
<ul style="list-style-type: none"><li>• Gantt chart</li></ul>
<ul style="list-style-type: none"><li>• histogram</li></ul>
<ul style="list-style-type: none"><li>• bullet chart</li></ul>
<ul style="list-style-type: none"><li>• charts on maps</li></ul>
<ul style="list-style-type: none"><li>• methods of building reports in a tabular layout</li></ul>
<b>Grouping</b>
<ul style="list-style-type: none"><li>• how to use clustering to organize data?</li></ul>
<ul style="list-style-type: none"><li>• how to use grouping in visualisations</li></ul>
<b>Filters</b>
<ul style="list-style-type: none"><li>• discussion of filter types, range and formatting</li></ul>
<ul style="list-style-type: none"><li>• filtering levels in Tableau for example</li></ul>
<ul style="list-style-type: none"><li>• effective use of filters in dashboards</li></ul>
<ul style="list-style-type: none"><li>• top N, formulas</li></ul>
<b>Calculations in Tableau</b>
<ul style="list-style-type: none"><li>• calculations at source level for operations on text, dates, conversion of data types</li></ul>
<ul style="list-style-type: none"><li>• calculations on aggregates</li></ul>
<ul style="list-style-type: none"><li>• table calculations</li></ul>
<ul style="list-style-type: none"><li>• conditional and logical calculations</li></ul>
<ul style="list-style-type: none"><li>• LOD expressions, simple examples for Fixed, Include and Exclude</li></ul>
<ul style="list-style-type: none"><li>• use of calculations in creating visualization</li></ul>



<b>Parameters</b>
<ul style="list-style-type: none"><li>• use of parameters to interact with the user</li><li>• use of parameters to create universal measures</li></ul>
<b>Data sets</b>
<ul style="list-style-type: none"><li>• working with static sets</li><li>• creating dynamic sets and their practical application examples</li></ul>
<b>Working with maps</b>
<ul style="list-style-type: none"><li>• basic data visualization on maps</li><li>• map functionalities: layers, toolbar, built-in geographical levels</li><li>• creating new areas on the basis of built-in</li><li>• use of the dual axis method for presentation on maps</li></ul>
<b>Dashboard construction methods</b>
<ul style="list-style-type: none"><li>• construction of dashboard, arrangement of tile elements</li><li>• defining interactions between dashboard elements using filtering actions</li><li>• customization of the dashboard format for different formats: desktop, tablet, smartphone</li><li>• methods of effective presentation of data</li></ul>
<b>Story - data presentation</b>

## List of Tableau Desktop training issues at intermediate and advanced level (1 day)

<b>Tableau Prep</b>
<b>Advanced report formatting in tabular formatting</b>
<b>Integration of data sources with the calendar</b>
<b>Calculations in Tableau</b>
<ul style="list-style-type: none"><li>• practical examples of the most common applications for Table Calculation</li><li>• practical examples of the most common applications for LOD expressions</li><li>• advanced Table Calculation applications to build visualization</li></ul>
<b>Working with geographical maps</b>
<ul style="list-style-type: none"><li>• applying data to jpg (background images )</li><li>• integration with map services (WMS, MapBox)</li><li>• own definitions of geographical hierarchies (custom geocoding)</li><li>• loading custom shapes or custom areas defined in shp files</li></ul>
<b>Dashboard and Stories construction methods</b>
<ul style="list-style-type: none"><li>• construction of pixel perfect dashboards, i.e. based on floating elements</li><li>• to discuss all the actions in an exemplary manner</li><li>• customization of the dashboard format for different formats: desktop, tablet, cell phone</li><li>• methods of effective presentation of data</li></ul>



<b>Data Blending - multiple data sources on one visualisation</b>
<ul style="list-style-type: none"><li>• combining data at different levels of aggregation</li><li>• calculations and their interpretation with multiple data sources</li><li>• practical application examples</li></ul>
<b>Advanced visualizations in Tableau and practical examples of their applications</b>
<ul style="list-style-type: none"><li>• construction of Sparklines visualisation</li><li>• construction of Slope Chart visualization</li><li>• construction of Control Chart visualisation</li><li>• construction of Pareto visualisation</li><li>• construction of Bolinger Bands visualisation</li><li>• construction of Waterfall Chart visualisation</li><li>• construction of Donut Chart visualisation</li></ul>
<b>Statistics in Tableau</b>
<ul style="list-style-type: none"><li>• trendlines</li><li>• medians, quartiles and others</li><li>• box graph</li><li>• forecasting</li><li>• focus analysis</li></ul>
<b>Building business analysis</b>
<ul style="list-style-type: none"><li>• What-If analysis</li><li>• profitability and growth quadrants</li><li>• Pareto diagram</li><li>• KPI dashboards</li><li>• budget vs. realization</li></ul>
<b>Performance analysis of workbooks</b>

## List of training topics for Tableau Explorer (1 day)

<b>Getting to know the Web Tableau Server interface</b>
<ul style="list-style-type: none"><li>• Desktop</li><li>• Navigation panel</li><li>• Exploration</li><li>• Projects</li><li>• Sheets</li><li>• Views</li><li>• Data sources</li><li>• Ask Data functionality</li></ul>



• Flows
• Efficient navigation
• Creating visualizations from the "Web Authoring" level
• Account settings page
<b>Interaction with content on the server</b>
• Drill Down and the actions
• Preview of source data
• Non-standard views
• Adding comments
• Downloading and exporting
• Sharing visualisation
• Subscriptions
• Data alerts
• Favorites
<b>Web-based authorisation</b>
• Use of published data sources
• Linking to previously published data sources
• Creating and editing visualizations in the Web environment
• Application of filters and sorting
• Working with dates in Tableau
• Viewing and creating popular types of visualization, including pivot tables, geographic maps, bar graphs, line graphs, heat maps, highlight tables, double axis visualizations and scatter plots
• Creating dashboards
• Use of reference lines and built-in analytical tools to highlight important data elements
• Creating basic calculations, including working with text variables, basic arithmetic calculations, custom calculations and coefficients and quick table calculations
<b>Data-based alerts</b>
• Configuring the alert in the published folder
• Improvement of the alert
• Alert management
• Cumulative bar chart
• Building alerts views
<b>Ask Data</b>
• Working with "Ask Data"
• Basics
• Examples
• Analytical phrases



• Aggregation and grouping
• Use of filters
• Sorting
• Determining the type of visualization
• Synonyms
• Asking more complex questions
<b>Explain Data</b>
• Explanations
• Flow of Analysis
<b>Interaction with content in the mobile application</b>
• Marks
• Sheets and workbooks
• Maps
• Non-standard views
• Editing the view



visualizations



reporting



compatibility



transparency



speed

## TABLEAU LICENSES



### Tableau Creator

It is designed for advanced users, data analysts. It defines connections to databases, creates analyses and makes them available to others.



### Tableau Explorer

It is dedicated for users working on previously published data sources. They can edit received analyses or create their own.



### Tableau Viewer

This solution is designed for users browsing previously created and published analyses and dashboards. It does not give the possibility of editing.

## TABLEAU VERSIONS



### Tableau Desktop

Version for personal use (fully professional set).



### Tableau Server

Server version dedicated to group work.



### Tableau Online

Cloud version with remote access (economical option).



### Tableau Prep

Additional module to prepare and combine different sources.

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