



# Quick Start Tableau for Leadership

Course ID #: 0360-754-00-W

Hours: 7

## Course Content

### At Course Completion:

After completing this course, students will have a clear understanding of how Tableau will give you the power to answer the true business questions.

### Target Student:

Leaders and upcoming leaders

### Prerequisites:

None

Please come to class with a trial or licensed copy of Tableau loaded on your laptop.

### Topics:

#### Understanding the Main Tableau Interface

- Overview of the main components of Tableau and how data is classified and used

#### Dimensions vs. Measures and How They Affect a Viz

- What's a Dimension – create headers or segments data, each header creates a pane
- What's a Measure – create axes and are numerical
- How they are classified by Tableau
- How they affect the viz
- Converting measures to dimensions and vice versa

#### Understanding and Utilizing “Show Me”

- What is Show Me and why it was created
- How can it help you build a viz quickly
- How to use it to see different insights from a data set

#### Basic Dates

- Looking at how the headers are placed on charts
- Discrete Dates and how to rearrange to gain new insights
- Date parts – eliminating the drill down functionality, and getting the aggregation right
- Continuous Dates and the way it changes your chart
- Creating Custom Dates

#### Sorting and Grouping

- How to sort
- How to group and why groups are useful



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## Basic Aggregations

- Sum and Average
- Min/Max
- Count and Count Distinct – count of all purchases per customer vs. count of customers
- Using different aggregations in the same view

## Quick Table Calculations in 1 click

- % of Total
- % Difference (month over month and year over year)
- Variance
- Moving Average
- Running Total

## Basic Calculations

- Ratios
- If/Then

## Building Your First Dashboard

- Bringing it all together into a dashboard
- Basic design layouts
- Adding formatting, titles and captions
- Making some objects floating

## Quick Filters and Action Filter

- What they are and how to create
- Incorporating into a dashboard
- Creating cascading filters and filter options

## Save and Close

- How to Save and Saving Options review
- Where to Save and Publishing Options
  - Print to PDF
  - Export Image
  - Tableau Reader
  - Tableau Server

## Q&A