SimpleGuru

TABLEAU

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Basics of BI

- ➢ What is Business Intelligence?
- ➢ What is Data?
- ➢ Types of Data
  - a. Structured
  - b. Semi-Structured
  - c. Unstructured
- ➢ What is Datawarehouse?

Introduction to Tableau

- ➢ Tableau Overview
- ➢ Different Tableau Offerings
- ➢ Tableau Desktop User Interface
- ➢ Installing Tableau Desktop

Connecting to Data Source

- ➢ Types of Connections
- ➢ Connect to data from File
- ➢ Connect to data from different Data sources
- ➢ Change Data Source Settings
- ➢ Create a Live and Extract Connection
- ➢ Create a connection between multiple data source using Joins, Relationship, Data Blending and Unions
- ➢ Full refresh vs Incremental refresh
- ➢ Connecting to Tableau server

Working with Data

- ➢ Data Types
- ➢ Dimension vs Measures
- ➢ Discrete vs Continuous data
- ➢ Show or hide fields, Create aliases

Data Structuring in Tableau

- ➢ Create different Types of filters:
  - a. Data source Filter
  - b. Extract Filter
  - c. Context Filter
  - d. Dimension Filter
  - e. Measure Filter
- ➢ Sharing Filters with other visuals & datasource
- ➢ Order of execution of Filters
- ➢ Sort the data
- ➢ Create Groups, Sets from data
- ➢ Create Hierarchies for dependent data fields
- ➢ Create Bins, Histograms

Introduction to Visualizations

- ➢ Create Visualisations
  - a. Tables. Highlight Tables, Bar, Stacked Bar
  - b. Line, Combined and Dual Axis Chart
  - c. Scatter plot, Tree map, Bubble, Word
  - d. Area, Pie, Donut, Waterfall, Funnel
  - e. Box & Whisker, Bullet, Gantt, Bump
  - f. Thermometer, Lollipop, Pareto, Dumbell
  - g. Control, KPI and Sankey Charts
- ➢ Introduction to Geographic visualizations
  - a. Types of Map
  - b. Custom geo-coding
  - c. Manually assigning geographical locations
  - d. Tableau Map search
  - e. Load custom maps from WMS server
  - f. Load custom maps from Mapbox

Advanced Analytics Tableau

- ➢ What are different types of Calculation
- ➢ Explore built in functions
  - a. Number, String, Date
  - b. Logical, Aggregate, User
- ➢ What are Table Calculations
- ➢ Create Fixed LOD, Include LOD, Exclude LOD, nested LOD expressions
- ➢ Create YTD, PYTD, MTD, QTD, YOY% etc.
- ➢ Creating parameters
- ➢ Manage filters and calculations using parameters
- ➢ Switch columns, Visuals, metrics with parameters
- ➢ Use tooltips in visuals
- ➢ Create trend and reference lines
- ➢ Create reference and distribution bands
- ➢ Create forecasting and cluster visuals
- ➢ Dashboard UI and components walkthrough
- ➢ Create Dashboard layouts and formatting
- ➢ Build interactive dashboards using Actions
- ➢ Create stories & link multiple dashboards to story
- ➢ Configure dashboards to multiple Devices

Introduction to Tableau Server

- ➢ Overview of Tableau server UI
- ➢ How to create New site for each company
- ➢ Create New project, manage project by program
- ➢ How to publish a workbook in server
- ➢ How to create Manual and Schedule Refresh
- ➢ Create user groups, add users to group
- ➢ Create empty extract to handle large datasets
- ➢ Diff between Published and Embedded extract
- ➢ Create Row level security to manage user access
- ➢ How to optimize dashboard performance using performance recorder