



# TABLEAU TRAINING

TABLEAU DESKTOP  
FUNDAMENTALS

TABLEAU DESKTOP  
ADVANCED

TABLEAU PREP  
FUNDAMENTALS

TABLEAU SERVER  
ADMINISTRATION

# TABLEAU DESKTOP FUNDAMENTALS

The Tableau Desktop Fundamentals training addresses to those who are trying Tableau for the first time, or have a basic experience of that, no matter their analytical or technical backgrounds. Its aim is to make these users immediately productive. The training is mainly practical and intuitive, from the Tableau basic skills, to the simple and complex graphics, also combined in some interactive dashboards.

**DURATION:** 2 days

## THE SYLLABUS

### INTRODUCTION

The success of the visual analytics • How does Tableau work? • Terminology • Tableau workspace • How to explore data • Sharing data and views

### CONNECTING TO DATA

Connecting to a file or a server • Tableau data source • join / union / cross-database join • data preview • live or extract connections • sizes and measures • types of data

### ANALYZING DATA THANKS TO THE VIEWS

Crosstabs and highlighted tabs • bar charts and histograms • line plots and area charts • treemap and bubble charts • maps • pie charts • scatterplots • histograms & bins • views enriched with total, continuous and middle lines, clusters, tooltip viz and highlighters • size clusters • discrete and continuous axes • simple orders • multiple measurements on the same tab, or on the same axis, or dual axis

### CALCULATED FIELDS

Row-detail calculations or aggregated calculations • calculations with temporal functions • logical functions and KPIs • calculations of parameters • quick table calculations

### FILTERING AND SURFING DATA

Filters through sizes, measurements and dates • show filter • filtri gerarchici • SET filters • global filters on the data source • surf data in pages

### DATA BLENDING

Data blending versus cross-database join • relationships among data sources • using two or more data sources in a worksheet

### DASHBOARD & STORY

How to combine worksheets and other objects in a dashboard • using shared filters • creating interactivity through actions • layout for mobile devices • organizing worksheets e dashboards in a story

# TABLEAU DESKTOP ADVANCED

The Tableau Desktop Advanced training addresses to all those who already use Tableau and want to improve their skills. The training allows them to discover the most advanced functions of Tableau, to understand how does it works "under the hood" and to face analytical and visualization problems more and more complex.

**DURATION:** 2 days

## THE SYLLABUS

### PREPARATION AND ORGANIZATION OF DATA

Advanced extracts concepts (aggregate, incremental, multiple tables) • Convert data fields

### FILTERS

Order of application of the filters in Tableau (Tableau VizQL Workflow) • TOP N through dimensional, contextual and based filters on table calculation • User filters at data row level (requires Tableau Server) • Advanced use of Action Filters • Highlight instead of filtering (bump chart)

### TABLE CALCULATIONS

Table calculation functionality review • How to set up the correct scope of a table calculation (scope)

### SET

Using SET in calculated fields • SET actions to improve the interaction (proportional brushing and asymmetric drill-down)

### PARAMETERS

Use cases of the parameters in Tableau • Dynamic sorting through parameters • Parameter actions to improve the interaction (dynamic selector of views and measures, dynamic aggregation of values)

### ADVANCED ANALYSIS

Pass Through Features • LOD (Level of Detail) Expressions • Integration with R and Python

### COMPARISON OF MEASUREMENTS WITH A TARGET

Create a Variable Reference Line • Bullet Graph • Bar In Bar Chart

### VIEW DATA DISTRIBUTION

Box and Whisker Plot (Jitter Plot) • Pareto Chart • Bar Chart treemap

### VIEW DATA THROUGH GANTT CHART

Box and Whisker Plot (Jitter Plot) • Pareto Chart • Bar Chart treemap

### ANALYTICAL MODELS OF TABLEAU

Average / Median with 95% Confidence Interval • Trend Lines • Forecast • Cluster

### ADVANCED MAPPING FEATURES

Tableau's geography • Standard geographic roles • Map Layers, map Options, zoom Control, radial tool • Custom and geographic roles territorial groupings • Maps with spatial files (polygons and lines) • Hierarchical navigation on the map • Spatial join • Maps point-to-point • Use of a Web Map Service (WMS) and Mapbox • Maps based on background images. • Heat maps

## AGENDA

# TABLEAU PREP FUNDAMENTALS

The Tableau Prep Fundamentals training is planned to give the trainees the necessary tools and the skills to prepare and model data. The training fits to all those that already have 3 or 6 month experience with Tableau Desktop, or feel at ease with calculated fields.

**DURATION:** 1 day

## THE SYLLABUS

### INTRODUCTION

Why you should use Tableau Prep • Tableau Prep user interface

### CONNECTING TO DATA

File or Servers • Connecting to one or more files • applying filters

### EXPLORING DATA

Introduction • How to analyze data fastly • change management

### CLEANING DATA

Adding and configuring a cleaning step • automatic and custom split operations with textual fields • renaming and changing the fields type • field filtering • bring data together and replace data • creating a calculated field

### MODELLING AND COMBINING DATA

Adding and configuring a pivoting step • adding and configuring an aggregation step • adding and configuring a join step • interpreting a join's results • adding and configuring an union step

### OUTPUT MANAGEMENT

Adding and configuring an output step • Creating a different format

### MANAGING THE FLOWS' EXECUTION

Executing a flow from a command line • publishing and scheduling a flow on Tableau Server or Tableau Online

## AGENDA

# TABLEAU SERVER ADMINISTRATION

The Tableau Server Administration training is a generic training, dedicated to technical users who need to: 1) have the skills to manage and monitor a Tableau Server's installation on a single-node; 2) manage users and contents to integrate and develop with Tableau Server. During the training, the trainees will get information and best practises about security, performances, goverance and scalability. The training is also useful for those who want to improve their knowledge about Tableau Server or who are thinking about adopting Tableau Server.

**DURATION:** 1 day

## THE SYLLABUS

### TABLEAU PLATFORM OVERVIEW

#### TABLEAU PLATFORM OVERVIEW AND HOW TO INSTALL AND CONFIGURE TABLEAU SERVER

Verifying requirements • Tableau Server Authentication Model • First installation and configuration (Single Node) • Post-installation activities • Tableau Server Upgrade • Tableau Server's processes

### TABLEAU SERVER CONTENT ADMINISTRATION

Tableau Server's contents architecture • Managing users, groups, projects, workbooks and data sources • Creating View/Dashboard/Story via Web Editing • Security: permissions, roles, data access, Row Level User Filters • Server/Site Administration: Schedules, Tasks, Subscriptions, Settings

### TABLEAU SERVER PERFORMANCE MONITORING

Administrative View • Process status • TabMon • Tableau Server Cache • Performance recording

### COMMAND LINE UTILITIES

TMS CLI • TABCMD

### TABLEAU DEVELOPER RESOURCES

Javascript API • REST API • Tableau SDK • Web Data Connector • Extensions API



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# EXPERTS IN TABLEAU'S CONSULTANCY AND TRAINING

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