



Visualizing Data with Tableau Level 2

Course ISI-1472 2 Days Instructor-led, Hands-on

Course Description

Tableau is a revolutionary toolkit that lets you simply and effectively create high quality data visualizations. In this two day, instructor-led course, students will learn how to make the most of Tableau by connecting to various data sources and create different types of visualizations, including stacked bar charts, scatter plots and maps. You'll also learn about customizing Tableau's default settings for visualizations.

You'll find this course useful if you spend a lot of time conducting data analysis and creating reports. Students will learn the exact steps required to generate simple to complex graphics. Whether they are pie charts or box plots, you can create such graphics with ease and confidence; no more searching for scripts or laborious Excel hacks.

You'll start with getting your data into Tableau, move onto generating progressively complex graphics, and end with the finishing touches and packaging your work for distribution.

Learn how to create filled maps, use custom markers, add slider selectors, and create dashboards. You will learn how to manipulate data in various ways by applying various filters, logic, and calculating various aggregate measures. Then, you will learn how to create animated graphs and provide search box and drop-down selectors to users.

Course Objectives

After completing this course, students will be able to:

- Forecast with trend lines
- Manipulate and transform data
- Import data from various sources
- Create filled maps and use any shape file
- Share your work easily
- Create dashboards and scorecards
- Format and finish the graphic
- Observe statistical distributions

Prerequisites

Before attending this course, students should have attended Course ISI-1470, Introduction to Tableau or have equivalent experience and skills.

Contact ISI Inc for more information at 916.920.1700 or by visiting our website at <http://www.isinc.com>



Course Outline

Module 1: Connecting to Data Sources

Connect to various data sources, including text, Excel and Access files, as well as sources on a server.

- Connecting to text files, Excel files and Access databases
- Connecting to a SQL Server
- Pasting from a clipboard
- Connecting to other databases
- Connecting to Windows Azure Marketplace
- Understanding dimensions and measures
- Changing data types
- Apply filters
- Merging multiple data sources

Module 2: Creating Univariate Charts

Create charts on one variable, including bar graphs, pie charts, histogram, line charts, stacked bar charts and box plots.

- Creating tables, bar graphs and pie charts
- Sorting the graphs
- Creating histograms
- Creating line charts
- Using the Show Me toolbar
- Creating stacked bar graphs
- Creating box plots
- Showing aggregate measures
- Show the top 10 items

Module 3: Creating Bivariate Charts

Create charts with two variables, including tables, scatter plots, trend lines and the use of colors

- Creating tables
- Creating scatter plots
- Swapping rows and columns
- Adding trend lines
- Selecting color palettes

Module 4: Creating Multivariate Charts

Create charts with three or more variables, including facets, area charts, bullet graphs, dual axes charts, Gantt charts and heat maps

- Creating facets
- Creating area charts and bullet graphs

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- Creating dual axes charts
- Creating Gantt charts
- Creating heat maps

Module 5: Creating Maps

Create maps by setting geographic variables, placing markers, overlaying demographic data and using custom polygon shapes and choropleth maps

- Setting geographic roles
- Placing marks on a map
- Overlaying demographic data
- Creating choropleth maps
- Using polygon shapes
- Customizing maps

Module 6: Calculating User-defined Fields

Create new fields using predefined functions, calculating percentages, apply the if-then logic, showing totals and percentages of totals, discretizing data, manipulating text, aggregating data and applying local functions.

- Using predefined functions
- Calculating percentages
- Applying the If-Then logic
- Applying logical functions
- Showing totals
- Showing the percentage of totals
- Discretizing data
- Manipulating text
- Aggregating data

Module 7: Customizing and Saving

Modify visualizations by adding information, changing the default marker size and shape settings and saving files.

- Adding title and caption
- Modifying font sizes and colors
- Applying various marks
- Adding colors and labels
- Changing marks sizes
- Adding reference lines
- Printing to PDF
- Saving packaged workbooks
- Creating a workbook data extract

Module 8: Exporting and Sharing

Export images and data from the workbook, save them on the Tableau server and share them on the Web.

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- Saving a workbook on Tableau server
- Saving a workbook on the Web
- Exporting images and data

Module 9: Exploring Advanced Features

Explore some of the advanced features of Tableau, such as customizing marker shapes, adding various selectors and creating animated visualizations.

- Viewing data
- Changing the mark size
- Using the presentation mode
- Adding annotations
- Excluding data on the fly
- Customizing mark shapes
- Adding drop-down selectors
- Adding search box selectors
- Adding slider selectors
- Creating dashboards
- Creating animated visualizations
- Creating parameters