**ICPI Tableau Training Outline  
June 21, 2018**

**Welcome and Introductions – 9:30 – 9:40a**

* Download training materials
* Brief introductions

**Overview & Introduction to Tableau – 9:40 – 10:00a**

* Pre-training assessment result review
* Review training objectives
* Tableau functionality

**Series of Demos and Practice—10:00a – 12:15p**

*Connecting, Organizing and Manipulating Data – 10:00 – 10:30a* KN

* Connect data source and save workbook
* Examine data
* Create an extract
* Orientation to the worksheet interface
  + Measure and Dimensions
    - Review/edit metadata (string, number, geographic role)
  + Filters, Marks, Show Me
* Hierarchies
* Grouping indicators?
* Calculated measures (HTS\_TST, HTS\_NEG, HTS\_POS, Yield)

**Pause:** Are we all on the same page?

*Developing Tables and Visuals in Worksheets (10:30-11:45a)*

* Create a basic table (1. HTS Yield Trends) BB
  + Dragging dimensions and measures to rows and columns
  + Adding filters
  + Swapping rows and columns
  + Check data/QC
  + Using show me for quick table visuals
* Visualize site-level data using a bubble plot (2. HTS Yield/Site) BB
  + Using two or more measures to compare site-level data
  + Visualizing at site level by adding details
  + Analyze a third variable by manipulating size
  + Adding filters
  + Using color marks
  + Analytics pane
  + Tool tips
* Using geography to create a map (4. Geo) KN
  + Add geographic dimensions
  + Show me/Marks for filled map
  + Using color marks for a measure
  + Applying filters to selected worksheets

**Pause:** Are we all on the same page?

*Putting it All Together in a Dashboard (11:45a-12:15p)* KN/BB

* Pulling in selected worksheets (1, 2a, 4)
* Adding filter action
* Adding highlight action on Trends table
* Clean it up
  + Organizing panes
  + Sizing of dashboard set to automatic
  + Creating dynamic titles
  + Dashboard title
  + Editing legends
  + Showing worksheet as “entire view” in pane
  + Moving, hiding, renaming filters
  + Inserting “Objects”: blanks, images, text.

**Wrap-up (12:15-12:30p)**

* Discussion
* Resources & Community of Practice (Showcase—End or lunch and learn series)
* Post-training evaluation