



INTRODUCTION

- Welcome
- Why learn Tableau?
- Why learn from me?
- Course overview

Modules
1 – Connecting to & Preparing Data
2 – Understanding Tableau Concepts
3 – Exploring & Analysing Data
4 – Creating Stand-Out Dashboards



CONNECTING TO DATA SOURCES

- We need data!
- We need to understand the different data sources you can connect to.



DATA INTERPRETER

- The data interpreter is used when we have a data set that doesn't conform to the tabular structure that we need it to be.
- Using the interpreter automatically cleans our data set for us into the perfect structure.



LIVE CONNECTIONS VS EXTRACTS

Understanding the difference between live connections and extracts is vital. Both live connections and extracts have their advantages.

Live Connections:

- Real time data
- Tableau relies on database for all queries

Extracts:

- Snapshots of data saved in memory
- Tend to be much faster than live connections
- Must refresh the extract to retrieve latest data.



JOINS & RELATIONSHIPS

- A join combines two data sets together into one table.
- A relationship acts like a join however keeps the tables separate.
- Relationships are known as the logical layer and joins are known as the physical layer.

Join Disadvantages:

- Joins are static
- May result in losing data
- Can result in poor performance

UNIONS

- Unions are an extra method of combining two or more tables in Tableau.
- Achieved by appending rows from one table to another.
- Can only be successful when the tables contain the same columns.



2020			
Date	Sales	Costs	Profit
Q1	£6,275	£1,234	£5,041
Q2	£6,386	£1,432	£4,954
Q3	£2,567	£2,341	£226
Q4	£6,545	£2,314	£4,231

2021			
Date	Sales	Costs	Profit
Q1	£8,978	£1,234	£7,744
Q2	£7,980	£1,432	£6,548
Q3	£6,879	£2,341	£4,538
Q4	£9,787	£2,314	£7,473

Overall Stats				
Date	Sales	Costs	Profit	Table
Q1	£6,275	£1,234	£5,041	2020
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DATA SOURCE FILTERS



- Applies the filter at the data source level.
- Used when we want to eliminate data from the entire workbook.
- Can save us development time.
- Positive performance benefit.





SUMMARY

- How to connect to a data source
- Data Interpreter
- Metadata Table
- Live Connections Vs Extracts
- Joins & Relationships
- Unions
- Data Source filters
- Renaming fields
- Changing data types
- Changing default properties