Contents

This document details the levels of DIT team members, as well as what is expected from the team to be promoted to the next level. For clarity, the topics listed against each level are required for promotion, e.g., we would expect a BIA to be able to cover everything in the list provided at the BIA level. The requirements are also cumulative, so each level builds on the knowledge of the previous one.

Document revision history

Date	Version	Author	Notes
28 July 2022	1.0	Anu Jaithirtha	Initial version
14 Feb 2023	1.1	Anu Jaithirtha	Reviewed with HR

General topics

Level	Tech – Data	Tech – BI and visuals	Business knowledge and independence

Junior	Basic SQL
	• SELECT
	• WHERE
	• GROUP BY
	• L, R, and INNER JOIN
	• WHERE vs HAVING
	• LIKE vs IN
		• Some exposure to BI concepts
		  o Dimensional modelling
		  o Entities
		  o Relationships
		• Basic Tableau knowledge, or one other BI tool
			• Needs constant support
			• Has basic business knowledge
			  o Frontiers domains
			  o Understands basics of front-end tools

BIA	• Moderately complex SQL
	  o Can create views and SPs and choose between them
	  o UNION, PIVOT
	  o Window and analytic functions
	  o Data deduplication
	  o Can query DIT / DAE curated sources
	• Confidently defines and controls the grain of tables, views, and data sources
		• Can build basic dashboards from scratch
		• Can use existing DS and build simple embedded queries for other cases
		• Basic QA:
		  o L1: own work
		  o L2: other unit members' work
			• Some independent work with frequent review
			• Stakeholder meetings:
			  o L1: Can attend and follow-up
			  o L2: Can lead and translate basic requirements into design
			• Business knowledge:
			  o L1: basic knowledge of unit scope and responsibilities
			  o L2: Additionally, very confident in 1-2 areas
			• Knows how to appropriately escalate issues

Level	Tech – Data	Tech – BI and visuals	Business knowledge and independence
Senior	- Models data from source to dashboard and understands and applies transformations appropriately - Confidently reads and writes complex T-SQL queries and breaks down a problem into constituent parts to create a solution - Performs exploratory analysis of data in source systems - Liases with DAE to acquire data from source - Basic troubleshooting and performance analysis of queries	- Understands best practice - Dashboard design and visualizations - Performance optimization - Contributes to team development - Knowledge-sharing - Informal mentoring - Can build complex dashboards from start to finish without support - Can troubleshoot and QA other peoples' work - Spots opportunities for improvement, both technical and process	- Largely independent - Takes pro-active steps to be visible within the team and to stakeholders - Takes on appropriate responsibilities - Domain knowledge: very confident in 3-4 domains, basic knowledge of rest - Can work independently to gather requirements and generate efficient designs - Builds trusted relationships with clients and can clearly explain data and reports - Understands DIT data sources, content, and definitions - Can use front-end apps to check and debug data issues - Review Forum - RT Management - Salesforce (basic)

Tableau topics (visuals)

Level	Visual Analytics	Dashboards
Junior	• The Workspace Area: Learn the layout of the workspace area and the high-level dashboard creation process. • Getting Started with Visual Analytics: This Getting Started video introduces Visual Analytics by explaining how to control the marks in a view using the Marks Card and Show Me. • Drill Down and Hierarchies: Learn how to use Tableau's drill down capabilities and how to build your own hierarchies. • Built: Bar Chart Profit Ratio by City: Learn how to create a bar chart that appears when you hover over the map. • Build: Text Table: Key Performance Indicators: Learn how to quickly create a text table using the measure names and measure values automatically-generated fields.	• Building a Dashboard: Learn how to combine views and apply actions to create a fully interactive dashboard.
BIA – 1	• Measure Names and Measure Values: Learn how to use those "Measure Names" and "Measure Values" fields you've always ignored in the Data Pane. • Sorting: This video covers the various ways to sort, including one click options and advanced sorting. • Grouping: Learn what you can do to enhance your analysis with groups and visual grouping. • Creating Sets: Learn how to make constant, dynamic, and combined sets for use in your analysis. • Ways to Filter: This video is a brief overview of the main filtering options in Tableau. • Using the Filter Shelf: Learn the ins and outs of using the filter shelf with different types of data. • Where Tableau Filters: Understand the differences between Summary and Record level filtering and learn how to use a Data Source Filter.	• Building a Dashboard: This video covers the basics on how to use views and other elements to create an interactive dashboard. • Dashboard Objects: Learn how to add pieces to an interactive dashboard and control their layouts. • Dashboard Formatting: Learn how to customize and format various aspects of a dashboard • Dashboard Interactivity Using Action: Learn how to enhance the interactivity of your dashboards using highlight, filter, and URL actions. • Publishing to Tableau Server: Learn how to publish a workbook from Tableau Desktop to Tableau Server and what the options are for sharing a published workbook.

Level	Visual Analytics	Dashboards
	• **Interactive Filters**: Learn how to use filters to add interactivity to your views. • **Additional Filtering Topics**: This video covers deeper topics in filtering. • **Parameters**: Learn how to use parameters in a variety of ways to enhance interactivity. • **Dynamic Parameters**: Learn how to use dynamic parameters to automatically refresh the list of parameter values and set a default value. • **Formatting**: Learn about options for formatting the view and how to control the layout of your analysis. • **The Formatting Pane**: Learn about options for formatting the worksheet and how to copy and paste your formatting. • **Basic Tooltip**: Learn how to take your analysis one step further by customizing and building useful tooltips. • **Maps in Tableau**: Learn how to use geographic roles and plot location data in Tableau desktop.	
BIA – 2	• **Additional Ways to Group**: See an example of how to use calculations and parameters to dynamically group data. • **Working with Sets**: See examples of how to use sets with other features of Tableau Desktop to enhance an analysis. • **Trend Lines**: Learn how to add trend lines to an analysis and access information about the model to determine if the trend is of analytical value. • **Reference Lines**: This video covers how to add reference lines (and reference bands, distributions, and box plots) to a view to enhance your analysis. • **Parameter Actions**: Learn how to use parameter actions to change the value of a parameter by interacting with a viz. • **Viz in Tooltips**: Learn how to embed visualizations within a tooltip for enhanced analysis and deeper information about your data.	• **Device Designer**: Customize versions of a dashboard for optimized viewing on a tablet or phone with device designs. • **Story Points**: Share the story behind your data with Story Points.

Level	Visual Analytics	Dashboards
	• [Maps, Editing Unrecognized Locations](): If you have a map with an indicator that says "unknown" , this video explains what's going on and how to fix it. • [Background Images](): Learn how to bring a background image into Tableau and to plot data on that image.	
Senior	• [Set Actions](): This video provides an overview of how to use set actions in Tableau. • [Explain Data](): Learn how Explain Data provides AI-driven explanations to uncover hidden insights and guide your deeper analysis of your data. • [Forecasting](): Learn how to use forecasts in Tableau and how to evaluate or show information about the forecast.	• [Device Designer](): Customize versions of a dashboard for optimized viewing on a tablet or phone with device designs.

Tableau topics (data)

Level	Data Sources	Calculations	Best Practice
Junior	• Connecting to Data: Learn to connect to data and relate tables.	• Getting Started with Calculations: Get an overview of calculations in Tableau with this quick introductory video • Calculation Syntax: Dissect a simple calculation to see what the various aspects of calculation syntax are in Tableau. • Intro to Table Calculations: This video introduces creating and using Table Calculations, with an emphasis on Quick Table Calculations.	• N/A
BIA – 1	• Managing MetaData: Learn how to manage and customize your data sources in Tableau with metadata management. • Managing Extracts: Learn how to manage and customize your data sources in Tableau with extracts. • Saving and Publishing Data Sources: Have you managed your metadata and polished your data source? Learn how to save or publish it for others to use. • Join Types with Union: Confused by Joins? Here's a primer on Left, Right, Inner, and Full Outer Joins • Data Blending - an introduction: Learn the basics on Data Blending and how to use data from two different sources simultaneously in Tableau.	• Modifying Table Calculations: Learn how to modify table calculations to gain greater control over exactly how the calculation is performed. • Introduction to LOD Expressions: This video provides an introduction to LOD Expressions – what they are, an example, and a breakdown of the syntax. • Aggregate Calculations: This video covers several aspects of aggregations used in calculations, including explanations of AGG and ATTR • Date Calculations: This training covers dates from the simplest use of manipulating dates in the view to more advanced calculations. • Logic Calculations: This training gives several examples of how and why we can use logical statements in calculations in Tableau.	• Understanding Pill Types: Ever wonder why a field in your view isn't behaving as you expected? It may be the pill type watch this video to learn more about dimensions, measures, and continuous and discrete pills. • Tableau's Order of Operations - Tableau:The order of operations in Tableau, sometimes called the query pipeline, is the order in which Tableau performs various actions. • Top 15 Tableau LOD Expressions (Practical Examples): These LOD expressions let people express powerful concepts using simple statements.

Level	Data Sources	Calculations	Best Practice
		• **String Calculations**: This training introduces some of the uses of string functions within Tableau calculations. • **Number Calculations**: This training goes over two quick calculations that leverage number functions. • **Type Calculations**: This training shows how to change data types in a calculation and some examples of when that might be necessary. • **Aggregation, Granularity, and Ratio Calculations**: Ever need to compute something like clicks/impressions or profit/sales in Tableau? This video shows you how to make sure your calculation is always correct by introducing the concepts of aggregation and granularity of the view. • **Filtering for Top Across Panes (INDEX and RANK function)**: This video goes over the nuances of filtering for Top across panes using table calculations INDEX or RANK	
BIA – 2	• **Relationships**: Learn how relationships can help you easily analyze data from multiple tables at different levels of detail. • **Additional Data Blending Topics**: This video covers common issues with data blending, including creating calculations across data sources and dealing with asterisks.	• **Conceptual Topics with LOD Expressions**: Dive deeper into Level of Detail Expressions Syntax and the implications of using a given keyword. • **Aggregation and Replication with LOD Expressions**: Dive deeper into Level of Detail Expressions and how the calculation results are reconciled with the Level of Detail of the view.	• Performance Monitoring • Best Practice Design (extrapolate from requirements)

Level	Data Sources	Calculations	Best Practice
		• Nested LOD Expressions: Dive deeper into Level of Detail Expressions and how nested LOD Expressions are evaluated	
Senior	• Connect to Data from the Web: As a Creator, you can connect to new data sources directly from the browser. Learn how with this training video.	• N/A	• Designing Efficient Workbooks Paper