## Instruction Schedule – Based on Part - Time Cohort

• 60 minutes: welcome and content read

• 60 minutes: lecture and demo lessons

• 30 minutes: work on challenges

• 30 minutes: walkthrough challenge solutions and wrap up

## Instruction Schedule – Based on Full - Time Cohort

### Morning session:

• 60 minutes: welcome and content read

• 60 minutes: lecture and demo lessons

• 30 minutes: work on challenges

• 30 minutes: walkthrough challenge solutions and wrap up

Break – 30 mins

### Afternoon session:

• 60 minutes: recap and content read

• 60 minutes: lecture and demo lessons

• 30 minutes: work on challenges

• 30 minutes: walk through challenge solutions and wrap up

## Tableau Instructor Guide Introduction

Welcome to Tableau! This workshop will introduce students to Tableau and the fundamentals of effectively communicating their findings as an analyst, using compelling visuals via BI tools. Your role as the instructor is critical to the student learning experience. You will be meeting with students in a synchronous environment three times a week and should be prepared with the teaching goals, strategies, and structure for each class. This is where the instructor guide comes in! Each synchronous class covers one module and you will be provided an instructor guide for every module. The modules are further subdivided into lessons. The guide is meant to offer you the goals and key considerations for each module as whole, but also each lesson. We hope this will help and make you feel supported in your very important role.

# Module 1 – Instructor guide

### Introduction to Tableau

### Module Learning Outcomes

In this module students will,

1. Define what Tableau is.
2. Identify Tableau key terms.
3. Demonstrate how to install and navigate Tableau.
4. Identify the difference between Tableau and Excel.

### Module Overview Description

This module will get students familiar with Tableau, key terminology, and familiarize them with how to navigate. The module wraps up with a Challenge activity to review what they have learned by answering foundational questions.

### Considerations to Keep in Mind

* Some students may come with no experience in Tableau and BI tools whereas others might already be proficient.
* There is a workbook for the entire Tableau workshop. Encourage students to use the workbook to take notes.
* Each class will start with a lesson video that will introduce key concepts and examples for the designated modules and how data analysts use Tableau.
* The module will end with a challenge activity.

### Lesson 1: Introduction to Tableau

* Build students knowledge and guide them through the following ares:
  + Define Tableau.
  + Describe the key features of Tableau.
  + Identify the types of files that Tableau can connect with.

### Lesson 2: Key Terms and Navigation

* Build students knowledge and guide them through the following ares:
  + Define the following Tableau product offerings:
    - Desktop
    - Public
    - Server
    - Online
    - Reader
  + Define the following Tableau key terms.
    - Worksheet
    - Workbook
    - View
    - Pane
    - Repository
    - Marks
    - Filter
    - Data Source
    - Cross-Tab
    - Dashboard

### Lesson 3: Tableau at a Glance

* Using the Tableau workspace, walk students through the following areas:
  + Identify what can be accessed in the top toolbar.
  + Identify what can be done using the formatting toolbar.
  + Describe what the analytics tab does.
  + Explain what the “show me” feature is in Tableau.
  + Describe the ways that you can create a new worksheet.
  + Describe the ways that you can create a new dashboard.
  + Describe the ways that you can create a new story.

### Lesson 4: Tableau versus Excel

* Walk students through Tableau versus Excel covering the following:
  + Describe some data exploration and discovery differences between Excel and Tableau.
  + Describe some functionality differences between Excel and Tableau.
  + Describe some differences between Excel and Tableau when creating visuals.

# Module 2 – Instructor guide

### Data Source Page

### Module Learning Outcomes

In this module students will,

1. Define what Tableau is.
2. Identify Tableau key terms.
3. Demonstrate how to install and navigate Tableau.
4. Identify the difference between Tableau and Excel.

### Module Overview Description

This module will get students familiar with navigating Tableau, data types, structures, and how to customize fields. The module wraps up with a Challenge activity to review what they have learned by answering foundational questions, using Tableau.

### Lesson 1: Data Source Page

* Build students knowledge and guide them through the following areas:
  + The data source page and all of the elements that are included and what can be done.
  + Describe the 4 main areas of the data source page:
    - Left Pane
    - Canvas
    - Data Grid
    - Metadata Grid

### Lesson 2: Data Characteristics

* Build students knowledge and guide them through the following areas:
  + Explain why it is important to have a data identifier.
  + Explain how values are determined by Tableau once data is connected.
  + Identify the most common data types and their icons.
  + Discuss a few things to keep in mind when changing data type.
  + Define a dimension in Tableau.
  + Define a measure in Tableau.
  + Discuss what to keep in mind when working with mixed data types.
  + Describe how Tableau reads in the following data value fields:
    - Text
    - Date
    - Numbers
    - Boolean

### Lesson 3: Data Characteristics

* Build students knowledge and guide them through the following areas:
  + Describe value fields in Tableau.
  + Define and describe discrete variables.
  + Define and describe continuous variables.
  + Describe how to convert from discrete to continuous variables in Tableau.
  + Describe an example of a continuous variable.
  + Describe an example of a discrete variable.

### Lesson 4: Data Fields in the Data Pane

* Build students knowledge and guide them through the following areas:
  + Describe some features of the data pane.
  + Describe some of the field options in Tableau.
  + Define measure names.
  + Define measure values.
  + Describe some ways that you can reorganize the items in the data pane from the default layout.

# Module 3 – Instructor guide

### Tableau Customizing Fields

### Module Learning Outcomes

In this module students will,

1. Identify fields in the data pane.

2. Describe the different fields and data types.

3. Discuss the difference between a set, hierarchy, and parameter.

4. Demonstrate how to create a set, hierarchy, and parameter.

5. Identify the different data and time dimensions.

### Module Overview Description

This module will get students familiar with how to change fields and data types, help them learn the different types of data structures, and understand how to create groups, hierarchies, and sets. The module wraps up with a Challenge activity to review what they have learned by answering foundational questions and applying concepts using Tableau.

### Lesson 1: Creating Custom Hierarchies

* Build students knowledge and guide them through the following areas:
  + Define a data hierarchy.
  + Identify an example of a geographic hierarchy.
  + Describe the steps involved in creating a hierarchy.
  + Describe the steps involved in removing a hierarchy.

### Lesson 2: Grouping Data

* Build students knowledge and guide them through the following areas:
  + Discuss the purpose of creating groups.
  + Identify what you can do when creating groups.
  + Describe the steps involved in creating a group.
  + Identify a few things to keep in mind about groups.

### Lesson 3: Creating Parameters

* Build students knowledge and guide them through the following areas:
  + Explain what parameters do in Tableau.
  + Identify what parameters are in a workbook.
  + Describe the steps involved in creating parameters.
  + Define dynamic parameters.

### Lesson 4: Date and Time Fields

* Build students knowledge and guide them through the following areas:
  + Define the data sources that determine how Tableau formats date and time fields.
  + Describe how Tableau defaults date fields.
  + Explain the benefit of changing the date order from year to quarters.
  + Discuss the steps involved in changing the date format to continuous.

# Module 4 – Instructor guide

### Creating Basic Data Views

### Module Learning Outcomes

In this module students will,

1. Identify shelves and grid view.

2. Demonstrate how to drag and drop fields.

3. Demonstrate how to use one measure for multiple actions.

4. Create filters and subcategories.

### Module Overview Description

Welcome to the Creating Basic Data Views module of Tableau. This module will familiarize students with how to start building basic data tables, creating axes, applying filters, and comparing across blended measures. The module wraps up with a Challenge activity to review what they have learned by answering foundational questions and applying concepts using Tableau.

### Lesson 1: The View Pane

* Build students knowledge and guide them through the following areas:
  + Define the view and how to get data to the view.
  + Describe how to select more than one field from the data pane to drag to the view.
  + Describe how Tableau’s default system categorizes data fields in the shelves.
  + Explain how to remove fields from the view.

### Lesson 2: Headers and Axes

* Build students knowledge and guide them through the following areas:
  + Identify how dimensions and measures are placed in the view.
  + Describe how to adjust the table to see long titles in their entirety.
  + Discuss how to swap rows and columns in the view.
  + Describe how to overlap data fields and why it is valuable.

### Lesson 3: Adding Filters

* Build students knowledge and guide them through the following areas:
  + Describe the function of applying a filter.
  + Identify the steps involved in applying a filter.

### Lesson 4: Comparing Individual and Multiple Axes

* Build students knowledge and guide them through the following areas:
  + Identify a few options for creating combo charts in Tableau.
  + Describe the steps involved in blending multiple measures that share a single axis.
  + Describe the steps involved in adding an individual axis for each measure when creating combo charts.

# Module 5 – Instructor guide

### Building Common Charts

### Module Learning Outcomes

In this module students will,

1. Define the different types of tables.

2. Identify how to drill into the data.

3. Demonstrate how to change number formats.

4. Demonstrate how to use the Show Me feature.

### Module Overview Description

Welcome to the Building Common Charts module of Tableau. This module will get students familiar with the common charts used in Tableau, how to format numbers, drill into the data, and use the Show Me feature. The module wraps up with a Challenge activity to review what they have learned by answering foundational questions and building common charts.

### Lesson 1: Basic Tables and Charts

* Build students knowledge and guide them through the following areas:
  + Describe the features of a text table in Tableau.
  + Explain how to create a text table in Tableau.
  + Identify other names for text tables in Tableau.
  + Describe how to create a bar chart in Tableau.
  + Describe how to create line charts in Tableau.
  + Describe how to create a continuous line chart in Tableau.
  + Explain when to use scatter plots.
  + Describe how to create scatter plots in Tableau.
  + Describe how to create a map in Tableau.
  + Explain how to change the title of a worksheet in Tableau.

### Lesson 2: Drilling into the Data

* Build students knowledge and guide them through the following areas:
  + Describe the value of having the indicator of the special value.
  + Define treemaps and what they are used for.
  + Describe how to create a treemap in Tableau.
  + Discuss the considerations of plotting maps that have unknown fields.
  + Explain how to filter out and edit null dimensions or discrete measures in Tableau.
  + Discuss what to do if a field has negative values.
  + Identify how Tableau defaults the following data types:
    - Numbers
    - Dates
    - Negative values
    - Unknown geographic locations

### Lesson 3: Number Formats

* Build students knowledge and guide them through the following areas:
  + Identify and define the important number formats and options in Tableau.
  + Describe how to format a field in Tableau.

### Lesson 4: Show Me

* Build students knowledge and guide them through the following areas:
  + Describe what the Show Me feature does in Tableau.
  + Explain how to use the Show Me feature in Tableau.
  + Identify some of the suggestions that the Show Me feature offers.

# Module 6 – Instructor guide

### Formatting Charts

### Module Learning Outcomes

In this module students will,

1. Demonstrate how to hide data.

2. Discuss the difference between hiding and filtering rows and columns.

3. Demonstrate how to use marks card and create labels.

4. Demonstrate how to create aliases.

### Module Overview Description

Welcome to the Formatting Charts module of Tableau. This module will get students familiar with how to format charts by hiding rows and columns, aliasing field names, using the marks card, and creating labels. The module wraps up with a Challenge activity to review what they have learned by answering foundational questions and formatting charts.

### Lesson 1: Hiding Data

* Build students knowledge and guide them through the following areas:
  + Describe the behind the scenes difference between hiding data and excluding data in Tableau.
  + Explain the steps involved in hiding data in Tableau.
  + Explain the steps involved in excluding data in Tableau.

### Lesson 2: Marks Card and Labels

* Build students knowledge and guide them through the following areas:
  + Define the marks card and its properties.
  + Describe the process in using the marks card elements.
  + Identify considerations when using the marks card properties.
  + Discuss the value in using labels for visuals.
  + Describe how to create labels for your visuals.

### Lesson 3: Create Aliases

* Build students knowledge and guide them through the following areas:
  + Describe the purpose of creating aliases.
  + Explain why you can’t change the alias of a measure.
  + Explain what needs to be done if you must change the alias of a measure.
  + Describe the steps to creating an alias.

### Lesson 4: Formatting Charts and Worksheets

* Build students knowledge and guide them through the following areas:
  + Describe some considerations when formatting your visuals in Tableau.
  + Explain what the Tooltip feature does in Tableau.
  + Describe the steps involved in changing the color of the bars in a bar chart.
  + Identify what can be done in the format pane.
  + Identify the steps needed to copy and paste visuals to another worksheet.

# Module 7 – Instructor guide

### Understanding Calculations

### Module Learning Outcomes

In this module students will,

1. Identify how to create basic calculated fields.

2. Describe the different types of calculated fields.

3. Demonstrate how to plot calculated fields and interpret them.

4. Identify the difference between basic calculations and aggregate calculations.

### Module Overview Description

Welcome to the Understanding Calculations module of Tableau. This module will get students familiar with how to create basic calculations in the data pane, the analysis tab, how to plot calculated fields, and the difference between level of detail and table calculations. The module wraps up with a Challenge activity to review what they have learned by answering foundational questions and applying concepts using Tableau.

### Lesson 1: Calculated Fields Using Shelves

* Build students knowledge and guide them through the following areas:
  + Define calculated fields.
  + Describe what calculated fields do.
  + Identify when you might want to create calculations.
  + Describe how to create a calculation.
  + Describe how to plot calculated fields.
  + Describe how to edit a calculated field after you have created a plot.

### Lesson 2: Basic Calculations using the Analysis Tab

* Build students knowledge and guide them through the following areas:
  + Describe another way to create calculated fields.
  + Describe how to edit a calculated field.
  + Define aggregate calculations.
  + Describe how to create an aggregate calculation.

### Lesson 3: Level of Detail Expressions

* Build students knowledge and guide them through the following areas:
  + Define LOD expressions.
  + Describe the three types of LOD expressions.
    - Fixed
    - Include
    - Exclude

### Lesson 4: Table Calculations

* Build students knowledge and guide them through the following areas:
  + Define table calculations.
  + Define the following quick table calculations.
    - Running Total
    - Difference
    - Percent Difference
    - Percent Total
    - Rank
    - Percentile
    - Moving Average
    - YTD Total
    - Compound Growth Rate
    - Year Over Year Growth
    - YTD Growth
  + Describe how to quick change a measure.
  + Describe how to create a quick table calculator of segments.
  + Describe how to remove a table calculation.

This module has the [*Tableau | Understanding calculations*](https://content.bridgepointeducation.com/curriculum/file/4818985c-a21a-463c-9dfc-99feb8f16a3d/1/Tableau%20Understanding%20Calculations.zip/story.html) interactive available for students to interact with and test their newly acquired skills. This is an interactive knowledge check with questions on performing calculations using column and row shelves and identifying the difference between level of detail and table calculations.

# Module 8 – Instructor guide

### Table Calculations

### Module Learning Outcomes

In this module students will,

1. Identify the difference between table, pane, and cell calculations.

2. Identify how to drag data fields to create a calculation using rows and columns.

3. Demonstrate how to create different table calculation types.

4. Demonstrate how to change the view of a table using table calculations.

### Module Overview Description

Welcome to the Table Calculations module of Tableau. This module will get students familiar with the different types of basic table calculations and how to create table calculations based on different directions using rows and columns. The module wraps up with a Challenge activity to review what they have learned by answering foundational questions.

### Lesson 1: Table Calculation Basics

* Build students knowledge and guide them through the following areas:
  + Define table calculations and describe their purpose.
  + Define partitioning fields and describe how it is done.
  + Define addressing fields and describe how it is determined.
  + Describe the steps for creating a table calculation.
  + Discuss what needs to be kept in mind about the table calculator.
  + Identify what happens when all dimensions are selected in the table calculator.

### Lesson 2: Table Calculation Directions

* Build students knowledge and guide them through the following areas:
  + Describe the common practices that make table calculations easier to debug.
  + Define Table (across) and describe how it will impact your table calculations.
  + Define Table (down) and describe how it will impact your table calculations.
  + Define Table (down then across) and describe how it will impact your table calculations.
  + Define Table (across then down) and describe how it will impact your table calculations.

### Lesson 3: Pane and Cell Calculation Directions

* Build students knowledge and guide them through the following areas:
  + Define Pane (down) and describe how it will impact your table calculations.
  + Define Pane (across then down) and describe how it will impact your table calculations.
  + Define Pane (down then across) and describe how it will impact your table calculations.

### Lesson 4: Table Calculation Types

* Build students knowledge and guide them through the following areas:
  + Define the following types of table calculations:
    - Difference from calculation
    - Moving calculation
    - Percent difference from calculation
    - Percent from calculation
    - Percent of total calculation
    - Percentile calculation
    - Rank calculation
    - Running total calculation
    - Describe the steps involved in creating a table calculation and a visual.

# Module 9 – Instructor guide

### Spotting Trends

### Module Learning Outcomes

In this module students will,

1. Identify trend analysis and data patterns.

2. Identify the different types of trends and how to understand your data.

3. Demonstrate how to add reference lines and reference bands.

4. Demonstrate how to create box plots.

### Module Overview Description

Welcome to the Spotting Trends module of Tableau. This module will get students familiar with the different types of trends and patterns within the data. Students will learn how to identify trends and patterns through the use of reference lines, reference bands, and particular plots that will help them analyze data in more detail. The module wraps up with a Challenge activity to review what students have learned by answering foundational questions.

### Lesson 1: Trend Analysis

* Build students knowledge and guide them through the following areas:
  + Define trend analysis and what it means for data analytics.
  + Describe the steps involved when working through trends and patterns.
  + Discuss the purpose, advantages, and disadvantages of the three common trends types listed below.
    - Geographic
    - Temporal
    - Intuitive
  + Describe the advantages and disadvantages of trend analysis.

### Lesson 2: Reference Lines

* Build students knowledge and guide them through the following areas:
  + Define reference lines and what they are used for.
  + When can you NOT use reference lines?
  + Describe the steps involved in creating reference lines.
  + Describe the different aggregate types that you can select as a baseline.

### Lesson 3: Reference Bands and Distributions

* Build students knowledge and guide them through the following areas:
  + Define reference bands.
  + Describe the steps involved in adding reference bands.
  + Explain what reference distributions are used for.
  + Describe the steps involved in creating distribution bands.

### Lesson 4: Box Plot

* Build students knowledge and guide them through the following areas:
  + Define box plots and what they are used for.
  + Describe what the lines on a box plot represent.
  + Describe the steps involved in creating a box plot.
  + Identify what happens when you hover over a point in Tableau.

# Module 10 – Instructor guide

### Data Sources and Blending

### Module Learning Outcomes

In this module students will,

At the end of this module, students will be able to

1. Identify the different types of data sources.

2. Identify the different types of data files.

3. Demonstrate how to connect to data files.

4. Demonstrate how to blend, join, and pivot data.

### Module Overview Description

Welcome to the Data Sources and Blending module of Tableau. Now that students have learned the details at the worksheet level, this module will get them familiar with the different types of data sources that they can analyze within worksheets. Students will learn how to connect to different data files, data sources, how to blend data, how to join data, and how to pivot data. The module wraps up with a Challenge Interactive activity to review what they have learned. To follow along in this module they can download and connect to the [Sample Superstore](https://drive.google.com/file/d/1zmIeZUObONY_IHGHAAXhKNcjjbHam0XE/view?usp=sharing) Excel data file and use Tableau Desktop or Tableau Public.

### Lesson 1: Connecting Your Data

* Build students knowledge and guide them through the following areas:
  + Describe the process for connecting your personal data files to Tableau.

### Lesson 2: Joining Your Data

* Build students knowledge and guide them through the following areas:
  + Describe the purpose of creating joins in Tableau.
  + Identify a few things to consider when creating data joins for Tableau.
  + Discuss the difference in blending and joining data when an aggregate is performed.
  + Identify the types of joins that are possible in Tableau.
  + Describe the steps involved in performing an inner join in tableau.
  + Discuss how changing the type of join can impact the columns and data fields in a worksheet.

### Lesson 3: Blending Your Data

* Build students knowledge and guide them through the following areas:
  + Define data blending and what it is used for.
  + Describe some common disadvantages when blending data.
  + Explain how blending data simulates a traditional left join.
  + Discuss the steps involved in creating a blend.
  + Describe what can be done if you have a null value indicator when blending data.

### Lesson 4: Pivot Your Data

* Build students knowledge and guide them through the following areas:
  + Define crosstab format.
  + Identify the steps involved in pivoting data.
  + Describe how to add more data to a pivot.

This module has the [*Tableau data sources and blending interactive*](https://content.bridgepointeducation.com/curriculum/file/b546238e-cd14-4b67-9937-9f67efcbff7d/1/Tableau%20Data%20Sources%20%26%20Blending%20Interactive.zip/story.html) available for students to interact with and test their newly acquired skills. This is an interactive knowledge check with questions on connecting data, identifying different types of joins, and demonstrating joining, blending and pivoting data.

# Module 11 – Instructor guide

### Data Sources and Blending

### Module Learning Outcomes

In this module students will,

1. Identify the different types of logical functions.

2. Identify the different types of benchmarks.

3. Demonstrate how to create bins.

4. Demonstrate how to create KPIs.

5. Demonstrate how to create annotations.

### Module Overview Description

Welcome to the Benchmarks and Logical Functions module of Tableau. Now that students have learned basic functions and chart formatting, this module will familiarize them with how to create and identify benchmarks in visuals. Students will learn how to create bins, logical functions, and identify key performance indicators. The module wraps up with a Challenge activity to review what they have learned. To follow along in this module you can download and connect to the [Sample Superstore](https://drive.google.com/file/d/1zmIeZUObONY_IHGHAAXhKNcjjbHam0XE/view?usp=sharing) Excel data file and use Tableau Desktop or Tableau Public.

### Lesson 1: Bins

* Build students knowledge and guide them through the following areas:
  + Define bins in Tableau and what they are used for.
  + Describe the steps involved in creating bins.
  + Explain how the bin size is calculated.
  + Describe how to create a chart from a binned dimension.
  + Explain how to delete a chart made from a binned dimension.

### Lesson 2: Logical Functions

* Build students knowledge and guide them through the following areas:
  + Identify the most common logical functions use in data analytics with Tableau.
  + Describe the steps involved in creating a calculated field.
  + Describe the steps involved in creating an IF and AND function and how that looks in the view.

### Lesson 3: KPIs

* Build students knowledge and guide them through the following areas:
  + Explain how to create KPIs on your view.
  + Describe how to create a calculated field that will set a benchmark to a data field.
  + Explain how to change shape style and why you would choose to do that for KPI benchmark analysis.

### Lesson 4: Annotations

* Build students knowledge and guide them through the following areas:
  + Explain what annotations are used for in your Tableau view.
  + Describe the steps involved in creating an annotation.
  + Describe how to move an annotation of the point it represents.
  + Explain how to format an annotation.

# Module 12 – Instructor guide

### Creating Advanced Charts

### Module Learning Outcomes

In this module students will,

1. Identify the different types of advanced charts.

2. Demonstrate how to create waterfall, pareto, donut charts, and word clouds.

3. Demonstrate how to use calculations in advanced charts.

4. Demonstrate how to create motion and animation in charts.

### Module Overview Description

Welcome to the Creating Advanced Charts module of Tableau. Now that students have learned how to apply calculated fields, table calculations, and chart formatting, this module will get them familiar with how to create more advanced visuals. Students will learn how to create views beyond the Show Me feature using motion, animations, and advanced charts. The module wraps up with a Challenge activity to review what they have learned. To follow along in this module you can download and connect to the [Sample Superstore](https://drive.google.com/file/d/1zmIeZUObONY_IHGHAAXhKNcjjbHam0XE/view?usp=sharing) Excel data file and use Tableau Desktop or Tableau Public.

### Lesson 1: Graphing Beyond Show Me

* Build students knowledge and guide them through the following areas:
  + Describe the steps involved in showing motion in your charts.
  + Describe the steps involved in showing animations in your charts.

### Lesson 2: Waterfall Chart and Calculated Fields

* Build students knowledge and guide them through the following areas:
  + Define a waterfall chart.
  + Describe the steps involved in creating a waterfall chart.

### Lesson 3: Pareto Charts

* Build students knowledge and guide them through the following areas:
  + Define pareto chart.
  + Describe some history behind the pareto chart and the 80% to 20% principle.
  + Discuss situations when a pareto chart is useful.
  + Describe the steps involved in creating a pareto chart.

### Lesson 4: Word Clouds

* Build students knowledge and guide them through the following areas:
  + Describe what a word cloud is and when it is used.
  + Describe the steps needed to create a word cloud.

# Module 13 – Instructor guide

### Creating Dashboards

### Module Learning Outcomes

In this module students will,

1. Identify dashboard best practices.

2. Demonstrate how to create an effective dashboard.

3. Demonstrate how to share and publish your dashboard.

4. Demonstrate how to share your dashboard for all device types

### Module Overview Description

Welcome to the Creating Dashboards module of Tableau. Now that students have learned how to apply calculated fields, table calculations, and create advanced charts, this module will get them familiar with how to create and publish dashboards. Students will learn dashboard best practices, how to create an effective dashboard, how to publish dashboards, and how to share dashboards. The module wraps up with a Challenge activity to review what they have learned. To follow along in this module you can download and connect to the [Sample Superstore](https://drive.google.com/file/d/1zmIeZUObONY_IHGHAAXhKNcjjbHam0XE/view?usp=sharing) Excel data file and use Tableau Desktop or Tableau Public.

### Lesson 1: Dashboard Best Practices

* Build students knowledge and guide them through the following areas:
  + Define a dashboard in Tableau.
  + Identify the steps needed to create a dashboard in Tableau.
  + Describe the purpose of creating a dashboard.
  + Explain what is needed to build an effective yet understandable dashboard.
  + Identify tips on how to make a dashboard run faster.

### Lesson 2: Creating Your Dashboard

* Build students knowledge and guide them through the following areas:
  + Explain how to hide a dashboard or sheet in Tableau.
  + Describe how to create a new dashboard and add sheets to it.
  + Describe the steps involved in changing or adjusting the size and place of a visual or chart or graph.
  + Explain other ways that you can enhance your dashboard.

### Lesson 3: Share and Publish Your Dashboard

* Build students knowledge and guide them through the following areas:
  + Explain how to format a dashboard.
  + Identify the questions you should ask yourself before publishing a dashboard.
  + Explain how to create a static image to view a dashboard.
  + Explain how to publish one or more views to PDF.
  + Explain how to export a Tableau workbook to PowerPoint.
  + Describe how to publish a dashboard.

### Lesson 4: Dashboard and Device Types

* Build students knowledge and guide them through the following areas:
  + Explain how to preview a dashboard for multiple devices.
  + Explain how to add a device to the preview.

# Module 14 – Instructor guide

### Forecasting

### Module Learning Outcomes

In this module students will,

1. Identify forecasting best practices

2. Identify the different types of forecast models using date data fields.

3. Demonstrate how to create an effective forecast

4. Demonstrate how to read and understand your forecast.

5. Demonstrate how to use the Show Me feature with your forecast.

### Module Overview Description

Welcome to the Forecasting module of Tableau. This module will get students familiar with how to enable and create forecasts using data sources. Students will learn forecasting best practices, how to create an effective and accurate forecast, using forecast options, methods, and models. The module wraps up with a Challenge activity to review what they have learned. To follow along in this module you can download and connect to the [Sample Superstore](https://drive.google.com/file/d/1zmIeZUObONY_IHGHAAXhKNcjjbHam0XE/view?usp=sharing) Excel data file and use Tableau Desktop or Tableau Public.

### Lesson 1: Forecast Fundamentals

* Build students knowledge and guide them through the following areas:
  + Define data analytics forecasting.
  + Define exponential smoothing.
  + Explain how having versus not having a date field impacts forecasting.
  + Describe how Tableau evaluates a forecast if you have more than one type of integer dimension.
  + When can you not add a forecast to a view?
  + Describe what the [OTexts website](https://otexts.com/fpp2/taxonomy.html?_fsi=KaVcU3ur&_fsi=KaVcU3ur) offers.
  + Discuss the two ways to draw seasonal length forecast outcomes.

### Lesson 2: Forecast Options and Model Types

* Build students knowledge and guide them through the following areas:
  + Describe the steps to use the built-in forecast options in Tableau.
  + Break down the forecast length options that you can select from in the Forecast Options dialog box.
  + Discuss the options that the source data section in the forecast options dialog box offers.
  + Discuss the trend and season options in the Forecast model dialog box.
  + Discuss the prediction interval options for forecast results.

### Lesson 3: Create a Forecast

* Build students knowledge and guide them through the following areas:
  + Describe what happens to a view when the Show Forecast option is enabled.
  + Discuss what the summary tab offers in terms of forecast descriptions.
  + Discuss what the models tab offers in terms of forecast descriptions.
  + Describe what each field result will display based on the forecast and set parameters.
  + Explain how to customize a forecast in the Forecast Options menu.

### Lesson 4: Resolving Errors

* Build students knowledge and guide them through the following areas:
  + Identify the likely problem that will cause an error when working in date fields.
  + Identify the likely problem that will cause forecasting errors.
  + Explain how to avoid aggregation errors.
  + Describe the common errors you can expect to run into when working with forecasting.

# Module 15 – Instructor guide

### Creating Stories

### Module Learning Outcomes

In this module students will,

1. Identify creating story best practices.

2. Identify the different types of storytelling features.

3. Demonstrate how to create an effective story.

4. Demonstrate how to build and read your story.

5. Demonstrate how to present your story.

### Module Overview Description

Welcome to the Creating Stories module of Tableau. This module will pull it all together and get students ready to navigate the story workspace. Students will learn to create stories, use best practices, determine how to create an effective and accurate story using the story workspace, examine trends, and bring data to life. The module wraps up with a Challenge activity to review what they have learned. To follow along in this module you can download and connect to the [Sample Superstore](https://drive.google.com/file/d/1zmIeZUObONY_IHGHAAXhKNcjjbHam0XE/view?usp=sharing)  Excel data file and use Tableau Desktop or Tableau Public.

### Lesson 1: The Workplace

* Build students knowledge and guide them through the following areas:
  + Define a story point and how it is created.
  + Describe the features of the story pane.

### Lesson 2: Great Storytelling Best Practices

* Build students knowledge and guide them through the following areas:
  + Discuss some tips and tricks to creating a great story.
  + Describe some data story tips and guiding questions that will help steer you when creating your storyboard checklist.
  + Explain how you can create a more clean and focused view to keep your audience from getting overwhelmed.

### Lesson 3: Build Your Story

* Build students knowledge and guide them through the following areas:
  + Explain the steps involved in creating a story point.
  + Discuss how to create a caption.
  + Describe how to add text to your story points once they are key findings.
  + Explain how to filter your data to create faster loading of your story.

### Lesson 4: Present and Share your Story

* Build students knowledge and guide them through the following areas:
  + Describe how to use presentation mode in Tableau.
  + Discuss a few tips and tricks for presenting.
  + Describe the steps to publish and share your story.