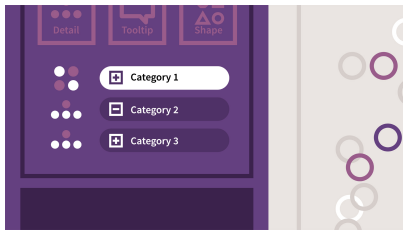# Tableau Essential Training (2020.1)

Tableau is a widely used data analytics and visualization tool that many consider indispensable for data-science-related work. Its drag-and-drop interface makes it easy to sort, compare, and analyze data from multiple sources, including Excel, SQL Server, and cloud-based data repositories. In this course, learn what you need to know to analyze and display data using Tableau 2020—and make better, more data-driven decisions for your company. Discover how to install Tableau, connect to data sources, and sort and filter your data. Instructor Curt Frye also demonstrates how to create and manipulate data visualizations—including highlight tables, charts, scatter plots, histograms, maps, and dashboards—and shows how to share your visualizations. Along the way, he highlights the new features packed into this edition of the software, including Viz Animations, which allows you to visually follow the movement of marks in a data visualization to see and understand your changing data.

Chapter: 2. Managing Data Sources and Visualizations

Video: Clean up source data (1 Notes)

For more extensive data cleaning, consider Tableau Prep.	3:29

Video: Present data using storylines (1 Notes)

To create a new story, click the New Story button to the right of the sheet tabs at the bottom of the UI.	0:38

Video: Display source metadata (1 Notes)

To view data source metadata, go to the Data Source tab and then click on the Manage Metadata button (left of Sort Fields text).	0:30

Chapter: 3. Managing Tableau Worksheets and Workbooks

Video: Display the data underlying a workbook (1 Notes)

To view data, from menus, select Data > [Data Source Name] > View Data	0:25

Chapter: 4. Creating Custom Calculations and Fields

Video: Present Tableau operators and built-in functions (3 Notes)

The percent sign is used for modular division (remainder)	0:50
CEILING rounds up to the next integer	2:32

FLOOR rounds down to the previous integer
Video: Create a calculated field (1 Notes)

3:11

To create a calculated field, from menus, select Analysis > Create Calculated Field
Video: Create a calculated field on a shelf (1 Notes)

0:51

To create a calculated field on the fly, double-click on a shelf

0:20

Chapter: 5. Analyzing Data

Video: Forecast future values (2 Notes)

To add a forecast, go to the Analytics tab of the navigation pane. And then under Model, drag Forecast onto the viz and drag it so that it is highlighting the Forecast icon.

0:42

Problem: Exact Date as selection in a Date value (need to select anything but)

2:57

Chapter: 7. Defining Groups and Sets

Video: Define a group (1 Notes)

To create a group Ctrl+Click to select more than one member, then click on the Group Members button (paper clip) in the the super tool tip.
Video: Define a group for Other values (2 Notes)

0:39

To create a group, 1) select menu on an existing grouped dimension and select Edit Group, 2) in the Edit Group dialog, check the box for Include 'Other'

0:54

Another way to create an "Other" group is to select a currently grouped dimension already on a shelf and from it's menu, select Include 'Other'

2:10