
Tableau Essential Training (2020.1)

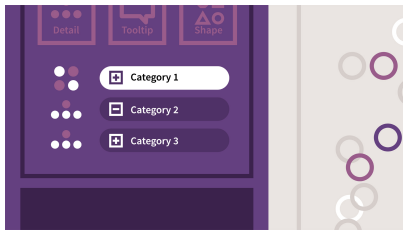


Tableau is a widely used data analytics and visualization tool that many consider indispensable for data-science-related work. Its drag-and-drop interface makes it easy to sort, compare, and analyze data from multiple sources, including Excel, SQL Server, and cloud-based data repositories. In this course, 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
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To create a calculated field, from menus, select Analysis > Create Calculated Field Video: Create a calculated field on a shelf (1 Notes)	0:51
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To create a calculated field on the fly, double-click on a shelf	0:20
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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
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Problem: Exact Date as selection in a Date value (need to select anything but)	2:57
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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
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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
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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' Video: Find members of a group (1 Notes)	2:10
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Edit Group has find functionality Video: Edit and delete groups (1 Notes)	1:06
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Group operations include, removing elements (Ungroup/Remove), adding elements (Add to...), renaming (Edit Alias outside of the Edit Group dialog box), ungrouping (also available from Super Tip Popup outside of the Edit Group dialog box). Video: Define a set (4 Notes)	0:17
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Define a set to analyze a portion of the data.	0:00
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Ctrl+click on desired elements to select them, mouse over them to display the Super Popup Tip dialog and click on the Create Set button (interlocking circles).	0:13
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Use sets as a predefined filter. Drag a set element to the Filters card.	1:26
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Sets appear in the Tables (Dimensions) section of the left navigation panel. Video: Create summaries using sets (4 Notes)	1:30
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Use sets to create segments in your data set (can be used for subtotals).	0:37
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To segment data, drag set elements to the appropriate shelf.	0:50
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To add subtotals, from the Analysis menu, select Totals > Add All Subtotals.	1:14
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(There must be a better way to group for subtotals than to have two additional columns at the left. Also, order of adding is important. For example, add Northern East to left of Sales Region, then add subtotals, then add Southern West to left of Northern East; otherwise, double total rows may result.) Video: Combine sets (2 Notes)	2:24
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To create a combined set, Ctrl-click on two or more sets, right-click on one and select Create Combined Set from the pop-up menu.	0:35
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The Create Set dialog box will appear. Select options (Name; Method: All members in both [union -- default], Shared members in both [intersection], One or other except shared members [left or right outer]). Video: Edit and delete sets (1 Notes)	1:09
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After you create one or more sets, you can edit the values they contain, change their names, or delete them entirely. In Edit Set dialog (from right-click menu), you can delete. Right-click Rename. Right-click Delete to delete the set. Not shown in the tutorial, but can add members to a set from the sheet (right click on the member and choose Add to [set name] or Remove from [set name]).	2:01
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Chapter: 8. Creating and Pivoting Crosstabs

Video: Create a crosstab (4 Notes)

To create a Crosstab (aka PivotTable in Excel), from Worksheet menu, select Duplicate as Crosstab.	1:04
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Note: Functionality of dragging one element from the Rows shelf to the Columns shelf to create a Crosstab appears to have been available in the original table sheet. Question: What is the difference?	1:43
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Based on Tableau documentation, the functionality is primarily available to start from a non-table sheet and get a table (crosstab) to work with for what sheet is in view.	2:09
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https://help.tableau.com/v2020.2/pro/desktop/en-us/enviro_n_workbooksandsheets.htm Video: Unpivot a crosstab (1 Notes)	2:31
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Unpivot by dragging elements from columns shelf to rows shelf to create a list from a crosstab.	0:02
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Video: Add totals and subtotals to a crosstab (1 Notes)

Add totals and subtotals from the Analysis > Totals menu.

0:03

Chapter: 9. Creating Basic Visualizations

Video: Create column and stacked column charts (1 Notes)

View available visualizations under the Show Me button.

0:43

Video: Create pie charts (1 Notes)

Pie charts can be a useful way to filter (exclude) data. Just click on the wedge and select Exclude from the pop-up tip.

1:16

Video: Create scatter plots (3 Notes)

To make a scatter plot, drag each of two different measures to a different shelf (one to rows, the other to columns), then deselect Aggregate Measures from the Analysis menu.

0:54

Change shape from open circle to filled circle by selecting Shape on the Marks card.

1:51

Change size of marks using Size on the Marks card.

2:14

Video: Identify data clusters (4 Notes)

To view clusters in a scatterplot, select the Analytics tab (left pane) and from the Model section, drag Cluster onto the Cluster target button.

1:20

Change number of clusters in the Clusters dialog.

2:21

To view statistics about the clusters, select the Clusters context menu from the Marks card and click Describe Clusters.

3:02

Remove clusters by dragging the Clusters pill away from the Marks card.

4:30

Video: Create histograms (1 Notes)

To create a histogram, drag a measure (e.g., Order Total) to the Data area, apply desired filters, then select Histogram from the Show Me panel.

1:19

Video: Summarize data using a smart histogram (1 Notes)

To edit the bin size in a histogram (Smart Histogram), in the Dimensions (Tables) section of the Data panel, click on the Order Total (bin) pill and select Edit, then enter a new value for the Size of Bins.

0:39

Video: Create a treemap (1 Notes)

To create a TreeMap, on a Text Table sheet, drag in a dimension to use as a category and then add a measure for the data. From the Show Me panel, select the TreeMap icon.

0:39