Tableau Tutorial - Getting Started with Tableau

Checklist of Concepts

Having watched the video and worked through the examples you should **understand** the following concepts and **be able to use them** in Tableau Desktop.

We'd like you to make a copy of this list and cross each item off as you have addressed it.

These are all **essential concepts** that you will need to be able to use in *Tableau Desktop* to succeed in the module.

Once you have tried each concept out when following the **Getting Started** videos then...
check the box or cross it off!

1. ☐   load an **Excel** file into Tableau - to 'connect' a data set

2. ☐   **extract** the data - know the difference between *live* and *extract*

   (we will normally want to extract)

3. ☐   know and understand the difference between **dimensions** and **measures**

   - **measures** - **green** pills - these are *quantities*, numbers
   - **dimensions** - **blue** pills - these are *qualities*, categories (usually names)

4. ☐   create a **hierarchy** of dimensions (categories)

5. ☐   **hide** dimensions and measures

6. ☐   **build** visualizations in the *sheet* by dragging dimensions and measure fields to the *shelves* and *cards*

7. ☐   **calculate** *new variables (measures) - a calculated field*

8. ☐   use the **back** or **undo** button

    to get back to where you were - before you messed things up!

9. ☐   use **SAVE** to save a *TWBX workbook* (a Tableau workbook with data)

10. ☐   use '**Show Me**' to select possible chart types

    *this is the **one click option**, not a comprehensive list of possibilities*

11. ☐   select a **colour scheme**

12. ☐   **change** the end and centre points of a *diverging colour scheme*

13. ☐   show and use a **filter** to select relevant data items *interactively*

14. ☐   use the **row** and **column** shelves to split the screen and structure a graphic

15. ☐   use the **marks shelf** to vary a graphic

16. ☐   know the difference between **discrete** and **continuous** fields

17. ☐ understand how Tableau uses **dates** (date parts and date values)

18. ☐ use **dates** to aggregate data by different time periods

19. ☐ use **SUM**, **AVG** and **COUNT** to aggregate rows in the data set

20. ☐ change **axis parameters** - *range, scale, title, tick marks*

21. ☐ create **level of detail** (LOD) calculations

22. ☐ change the **ordering** of *categories* displayed in a graphic and legend

23. ☐ use the *legend* to **highlight** particular categories

24. ☐ edit **tooltips** to include *dynamic text*

25. ☐ **filter** graphics *by date*, *interactively*

26. ☐ **rename** worksheets

27. ☐ **duplicate** worksheets - you will need to make copies as you make changes

28. ☐ use *Measure Names* and *Measure Values* to create a *text table*

29. ☐ create a **bar chart** and change the *ordering* used to sort bars

30. ☐ create **graphical tooltips**

31. ☐ arrange worksheets in a composite **dashboard**

32. ☐ **size** a dashboard

33. ☐ use the **item hierarchy** in a dashboard to *select and manage* dashboard contents

34. ☐ use **filters** to effect *all graphics* in a dashboard

35. ☐ add **filter actions** to *focus graphics* in a dashboard on selected items

36. ☐ **hide** header labels

Tableau Demo

Sometime soon, perhaps at the end of the session, maybe at the start, maybe next week or later on the course ... or perhaps on video (!) ... I'll be showing you how to do a few more important things.

Make sure you can do them too ...

37. ☐ understand the concepts of **aggregation** & **detail** an use them in your graphics

38. ☐ add **annotations** to graphics

39. ☐ use **entire view** to fit a graphic into the screen space available

40. ☐ add and use a **highlighter**

41. ☐ change the **colour** and transparency of marks

42. ☐ add **trend lines** from the analytics pane

43. ☐ create a simple **story** by ordering dashboards and workbooks (and adding titles)

44. ☐ create a **set** and colour items in a graphic according to *set membership*

45. ☐ *combine data visually* through a **dual axis**