



# Introduction to Data Visualization Using Tableau

### Pre-requisites

Hope you have gone through the self-learning content for this session on the PRISM portal.



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# By the end of this session, you will:

- Create diverse visualizations: Crosstabs, Highlight Tables, Heat Maps, Column Charts, Horizontal Bar Charts, Stacked Column Charts, Stacked Horizontal Bar Charts, Bar in Bar Charts, Line Charts, and Dual/Blended Axis Charts.
- Choose appropriate chart types for different data scenarios.
- Understand data representation in line charts with discrete and continuous data.
- Enhance data storytelling through compelling visualizations.
- Optimize visualization quality using best practices.
- Apply knowledge in hands-on Tableau practice.

Q. Which of the following is NOT a Tableau Field data type?

- a. String
- b. Number (whole)
- c. Boolean
- d. Float



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### **Basic Data Visualization**

#### Introduction to Basic Data Visualization

Data visualization is the graphical representation of data to communicate information and insights effectively. It is a powerful tool that transforms complex datasets into visual elements such as charts, graphs, and maps, making data more accessible, understandable, and actionable for decision-makers.

#### **Key Aspects of Data Visualization**

- **Visual Representation**: Data visualization uses visual elements like bars, lines, and pie charts to represent data points, making it easier to identify patterns, trends, and relationships within the data.
- **Simplifying Complexity**: It simplifies complex datasets by condensing large amounts of information into visually appealing and digestible formats, enabling users to grasp the key takeaways quickly.
- **Data Exploration**: Data visualization allows users to explore data interactively, enabling them to filter, drill down, and uncover insights in real time, promoting a deeper understanding of the data.

#### **Key Aspects of Data Visualization**

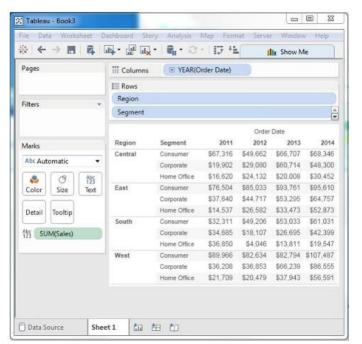
- **Effective Communication**: Visualizations help communicate complex data-driven insights to diverse audiences, making it an essential tool for data-driven decision-making across industries.
- **Identifying Anomalies**: Visual representation of data aids in identifying outliers and anomalies in datasets, facilitating data quality assessment and error detection.
- **Storytelling with Data**: Data visualization empowers data analysts and storytellers to present compelling narratives supported by data, enhancing the impact and persuasion of their messages.



Crosstabs/Text Table

#### Introduction to Crosstabs/Text Table

Crosstabs, also known as Text Tables in Tableau, are a fundamental data visualization technique used to present summarized data in a tabular format. They provide a concise view of data, organizing information in rows and columns, making it easy to compare and analyze values across different dimensions.



#### Use Case of Crosstabs/Text Table

- **Sales Analysis**: Crosstabs can be used to analyze sales data by regions or product categories, comparing sales revenue and quantities.
- **Survey Results**: Crosstabs are ideal for presenting survey responses, displaying frequencies and percentages of each answer.
- **Financial Reporting**: Crosstabs can summarize financial data, showcasing monthly expenses or revenue across different departments.
- Population Demographics: Crosstabs can be used to analyze demographic data, comparing population distribution by age groups and genders.



Demo - Crosstabs/Text Table

#### **Poll Time**

Q. In Tableau, a crosstab chart is also known as \_\_\_\_.

- a. Text table
- b. Field table
- c. Both a and b



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- b. Field table
- c. Both a and b





Crosstabs with Multiple Measures

#### **Crosstab with Multiple Measures**

A Crosstab with Multiple Measures in Tableau is a data visualization technique that presents summarized data in a tabular format while simultaneously displaying multiple measures across different dimensions. It allows users to efficiently compare and analyze various measures side by side, providing valuable insights into their relationships and trends.

#### **Key Features:**

- **Tabular Representation**: Crosstab with Multiple Measures displays data in a table format with rows representing one dimension and columns representing another dimension.
- **Multi-Measure Display**: It accommodates multiple measures, such as sales revenue, profit, and quantity, in individual columns for a comprehensive analysis.
- Aggregation and Summarization: The Crosstab can aggregate and summarize data based on the selected dimensions and measures.
- **Interactivity**: Users can interact with the Crosstab, filtering, sorting, and drilling down into specific data points for deeper exploration.



### Demo - Crosstabs with Multiple Measures



# Introduction to Highlight Tables and Heat Maps

#### Purpose of Highlight Tables and Heatmaps

#### **Purpose of Highlight Tables:**

Highlight Tables in Tableau serve the purpose of emphasizing specific data points or patterns within a tabular visualization. They are designed to highlight cells with distinctive colors based on pre-defined conditions or criteria. This enables users to quickly identify significant values, outliers, or trends within the data, promoting efficient data analysis and decision-making.

#### **Use Cases:**

- Sales Analysis: Use Highlight Tables to identify top-selling products, high revenue regions, or significant sales trends.
- Financial Reporting: Highlight Tables can be used to emphasize key financial metrics like profit margins, expenses, or revenue growth.
- Customer Segmentation: Identify customer groups with high customer satisfaction scores or revenue contributions using color-coded Highlight Tables.

#### Purpose of Highlight Tables and Heatmaps

#### **Purpose of Heatmaps:**

Heatmaps in Tableau are visual representations that use colors to convey the density or intensity of data points within a matrix or cross-tabulation. They help reveal patterns, correlations, and areas of interest in the data. Heatmaps are particularly useful when dealing with large datasets, allowing users to discern trends and relationships that may not be apparent in traditional tabular formats.

#### **Use Cases:**

- Geospatial Analysis: Use Heatmaps to visualize the density of points on a map, revealing areas of high activity or concentration.
- Web Analytics: Heatmaps are valuable in analyzing website user behavior, showing where users click or spend more time.
- Healthcare Data: Visualize patient outcomes or disease prevalence in different regions using color-coded Heatmaps.



# Demo – Creating Highlight Tables and Heat Maps

Q. How does the Tableau Highlight Table achieve emphasis on specific data points?

- a. By adding reference lines to the chart
- b. By applying color-coded cells based on conditions
- c. By displaying data points as individual marks
- d. By using dual axes for different measures



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## Introduction to Vertical Bar Chart and Horizontal Bar Chart

#### Introduction to Vertical Bar Chart

A Vertical Bar Chart is a fundamental data visualization tool that represents data using vertical bars of varying lengths. Each bar corresponds to a specific category or data point, and the height of the bar represents the magnitude of the associated value. Vertical Bar Charts are commonly used to compare discrete data values or categories and showcase frequency distributions.

#### **Key Features:**

- Vertical Bars: Data values are represented by vertical bars, making it easy to compare values across different categories.
- Axis Labels: The vertical axis (y-axis) typically represents the measured values, while the horizontal axis (x-axis) displays the categories.
- Data Comparison: Vertical Bar Charts facilitate quick visual comparison of data points, identifying variations and trends.

#### Introduction to Horizontal Bar Chart

A Horizontal Bar Chart is similar to a Vertical Bar Chart but displays data with horizontal bars instead of vertical ones. The length of the bars represents the data value, and the categories are shown on the vertical axis. Horizontal Bar Charts are useful when the category names are long or space is limited, as they allow for a clearer presentation of data.

#### **Key Features:**

- Horizontal Bars: Data values are represented by horizontal bars, suitable for long category labels.
- Axis Labels: The horizontal axis (x-axis) typically represents the measured values, while the vertical axis (y-axis) displays the categories.
- Data Comparison: Horizontal Bar Charts facilitate easy comparison of data points, especially when dealing with long category names.



# Demo – Vertical Bar Chart and Horizontal Bar Chart

Q. In a Tableau Horizontal Bar Chart, what does the horizontal axis typically represent?

- a. Time or continuous data values
- b. Discrete data categories
- c. The length of the bars
- d. The number of data points



Q. In a Tableau Horizontal Bar Chart, what does the horizontal axis typically represent?

- a. Time or continuous data values
- b. Discrete data categories
- c. The length of the bars
  - d. The number of data points





### Introduction to Bar-in-Bar Chart

#### Introduction to Bar in Bar Chart

The Bar-in-Bar Chart is a powerful and innovative data visualization technique in Tableau that allows for the simultaneous comparison of two sets of data using nested bars. It is an extension of the traditional bar chart and is particularly useful when presenting hierarchical or multi-level data comparisons.

#### **Key Features:**

- **Nested Bars**: The Bar-in-Bar Chart consists of two sets of bars, with one set nested within the other, representing two different measures or metrics.
- Hierarchical Comparison: It enables the comparison of data at two levels of hierarchy, providing a more detailed view of the data relationships.
- Data Emphasis: The nested bars draw attention to the relationships between the primary and secondary measures, highlighting the interplay between the two.



Demo – Bar-in-Bar Chart

Q. In a Tableau Bar-in-Bar Chart, what does the outer set of bars typically represent?

- a. The primary measure or data set
- b. The secondary measure or data set
- c. Time or continuous data values
- d. Discrete data categories



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- b. The secondary measure or data set
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# Introduction to Line Chart

#### Introduction to Line Chart

The Line Chart is a fundamental and widely used data visualization tool that represents data points using connected lines. It is especially useful for displaying trends and patterns over time or continuous data. Line Charts are valuable in revealing the trajectory of data, identifying changes, and visualizing data relationships.

#### **Key Features:**

- **Connected Data Points**: The Line Chart connects data points with straight lines, providing a continuous view of data trends.
- **Time Series Analysis**: It is ideal for visualizing data that varies over time, making it easy to observe trends and seasonality.
- Continuous Data Visualization: Line Charts can display the continuous flow of data, such as temperature, distance, or speed.



Demo – Line Chart

Q. How does the Tableau Line Chart represent data points?

- a. Using vertical bars
- b. By plotting discrete data points
- c. Connecting data points with lines
- d. Using different colors for each data point



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# Introduction to Dual Axis Charts

#### Introduction to Dual Axis Charts

The Dual Axis Chart in Tableau is a sophisticated data visualization technique that allows the simultaneous display of two measures with different scales on a single chart. It involves plotting two distinct axes on either side of the visualization to represent the measures independently, enabling users to compare and analyze two different data series effectively.

#### **Key Features**:

- **Multiple Measures**: The Dual Axis Chart accommodates two measures on separate axes, offering a comprehensive view of their individual trends.
- **Independent Scaling**: Each measure can have its own scale on the respective axis, preventing data with vastly different magnitudes from being distorted.
- **Combining Chart Types**: Dual Axis Charts support different chart types for each measure, enhancing the flexibility of data representation.



Demo - Creating Dual Axis Charts



# Introduction to Blended Axis Charts

#### Introduction to Blended Axis Charts

The Blended Axis Chart is an advanced data visualization technique in Tableau that allows users to blend or combine two different measures with varying scales into a single chart. Unlike the Dual Axis Chart, where measures have separate axes, Blended Axis Charts merge data points with different units or scales on a shared axis, facilitating a holistic view of the data relationship.

#### **Key Features:**

- Shared Axis: Blended Axis Charts share a common axis for both measures, ensuring a unified representation of data.
- **Blending Measures**: It combines two distinct measures within the same visualization, enabling comparison and correlation analysis.
- Consolidated Insights: The chart helps users understand how measures with different magnitudes interact and influence each other.



# Demo - Creating Blended Axis Charts

Q. In a Tableau Blended Axis Chart, how are the two measures usually visualized?

- a. Using vertical bars
- b. By connecting data points with lines
- c. As separate charts side by side
- d. Both measures are represented using different colors



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# Summary

- Discovered a range of data visualization methods, from crosstabs and heat maps to bar charts and line charts.
- Employed crosstabs with multiple measures for comprehensive analysis of data relationships.
- Utilized highlight tables to spotlight critical data points or trends with color-coded cells.
- Leveraged heat maps to reveal patterns and concentrations within large datasets through color gradients.

# Summary

- Utilized vertical and horizontal bar charts for effective comparisons of discrete data or categories.
- Employed line charts to showcase trends and patterns in continuous data or time series.
- Created dual axis and blended axis charts to combine and compare measures with varying scales in a unified visualization.

#### **Pre-requisites:**

- Basic understanding of Tableau interface and data connection.
- Familiarity with importing and preparing datasets in Tableau.
- Understanding of heat maps.

#### **Scenario:**

You are a Data Analyst working for a weather forecasting agency. The agency wants to analyze temperature variations across different cities over the past month. They need a clear visualization to identify temperature hotspots and cold regions for further analysis.

#### **Expected Outcome:**

Create a Tableau workbook that includes a heat map representing temperature variations for each city over the past month.

#### Steps:

- Data Preparation
- Create the Heat Map
- Customize the Heat Map
- Add Data Labels
- Finalize the Visualization
- Save and Export

#### **Pre-requisites:**

- Basic understanding of Tableau interface and data connection.
- Familiarity with importing and preparing datasets in Tableau.
- Understanding of bar charts and line charts.

#### Scenario:

You are a Data Analyst working for a retail company. The company wants to compare the sales revenue and profit margins for different product categories over the past year. They need a clear visualization to understand the relationship between revenue and profit margins and identify areas of improvement.

#### **Expected Outcome:**

Create a Tableau workbook that includes a dual-axis chart with bars representing sales revenue and a line representing profit margins for each product category.

#### **Steps:**

- Data Preparation
- Create the Bar Chart
- Create the Line Chart
- Combine the Charts
- Finalize the Visualization
- Save and Export

### **Next Session:**

Advanced Data Visualization using Tableau

# **THANK YOU**

Please complete your assessments and review the self-learning content for this session on the **PRISM** portal.







# Advanced Data Visualization using Tableau



# Pre-requisites

Hope you have gone through the self-learning content for this session on the PRISM portal.



# By the End of This Session, You Will:

- Create Scatter Plots for visualizing relationships between numerical variables.
- Utilize Pie Charts to represent categorical data and proportions.
- Construct Tree Maps for hierarchical data exploration.
- Generate Heat Maps to display data intensity and patterns.
- Develop Packed Bubble Charts to show hierarchical relationships.
- Create Word Clouds to visualize word frequency.
- Use Symbol Maps and Filled Maps for geographic data representation.

### **Poll Time**

Q. What is Tableau Public?

- a. A feature for private data sharing within an organization
- A cloud-based platform for sharing Tableau visualizations publicly
- c. A data storage service for Tableau workbooks
- d. A community forum for Tableau users



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lntroduction to Scatter Plot

#### **Introduction to Scatter Plots**

- Scatter Plots are graphical representations that display the relationship between two numerical variables.
- Each data point is represented by a dot on a two-dimensional coordinate system, revealing patterns and correlations between the variables.
- They are valuable tools for data analysis and decision-making, allowing us to identify trends, outliers, and data distributions.
- Interpreting Scatter Plots involves understanding the direction and strength of the relationship, making them essential for gaining insights from data in a visually intuitive manner.



# Demo - Creating Scatter Plots



# Introduction to Pie Charts

#### Introduction to Pie Charts

Pie charts are a popular data visualization tool used in Tableau to represent parts of a whole. They are effective in displaying the proportion of individual data points relative to the total dataset. In a pie chart, each data point is represented as a slice of the pie, with the size of the slice indicating its percentage contribution to the whole.

#### Introduction to Pie Charts

#### **Best Practices**:

- Avoid Overcrowding: Limit the number of categories to keep the chart clear and easily interpretable.
- Ordering Slices: Arrange the slices in descending order based on their percentage contribution for better comparison.
- Explode Slices: Optionally, explode one or more slices to emphasize specific categories, but use this sparingly to prevent clutter.
- Use Data Labels: Add data labels to display the exact percentage or values for each slice for precision.
- Legend and Colors: Utilize a clear legend and distinctive colors to aid in identifying each category.



Demo - Creating Pie Charts

Q. In Tableau, what type of data is best suited for creating a scatter plot?

- a. Categorical data
- b. Textual data
- c. Numerical data
- d. Time series data



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- b. Textual data
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Introduction to Tree Maps

# Introduction to Tree Maps

Tree maps are a powerful data visualization technique used in Tableau to represent hierarchical data in a hierarchical manner. They display data as nested rectangles, with each rectangle's size proportional to the data it represents. Tree maps are effective in showcasing the hierarchical structure of data and visualizing the distribution of values within each category.

## **Introduction to Tree Maps**

- **Hierarchical Data Representation**: Tree maps are designed to represent hierarchical data structures, making them ideal for showcasing parent-child relationships.
- **Data Hierarchy Visualization**: They help users understand the composition of categories and subcategories within a dataset.
- **Proportional Comparison**: Tree maps visually emphasize the proportionality of data values, making it easier to compare different categories and their subcategories.
- **Space Utilization**: The efficient use of space allows for the display of a large amount of hierarchical data without overwhelming the viewer.



Demo - Creating Tree Maps



# Introduction to Packed Bubble Chart

#### Introduction to Packed Bubble Chart

The Packed Bubble Chart is a unique and visually engaging data visualization technique used in Tableau to represent hierarchical and quantitative data. It displays data as a series of circles, with each circle's size proportional to the data it represents. Packed bubble charts are effective in visualizing the hierarchical relationship between data categories and the distribution of quantitative values within each category.

- Hierarchical Data Representation: Packed bubble charts excel at displaying hierarchical data structures, making them suitable for showcasing parent-child relationships.
- Quantitative Comparison: They provide a clear visual representation of the relative sizes and values of data categories and subcategories.
- Space Utilization: Packed bubble charts efficiently use space, allowing for the display of a large amount of hierarchical data in a compact and visually appealing manner.
- Interactive Exploration: Users can interact with packed bubble charts to explore data further, revealing details about each circle's data upon hovering or clicking.



# Demo – Creating Packed Bubble Chart

Q. What does the position of each bubble represent in a packed bubble chart?

- a. Data averages
- b. Data categories
- c. Data values
- d. Data relationships



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- a. Data averages
- b. Data categories
- c. Data values
- d. Data relationships





Introduction to Word Cloud

#### Introduction to Word Cloud

The Word Cloud is a captivating and intuitive data visualization technique used in Tableau to represent textual data. It displays words in a visual arrangement, where the size of each word corresponds to its frequency or importance within the dataset. Word clouds are powerful tools for gaining insights into text-based data, identifying key themes, and showcasing word frequency patterns in a visually appealing manner.

- Textual Data Visualization: Word clouds are designed to represent and visualize textual data, making them ideal for analyzing and displaying word frequency.
- Word Frequency Analysis: They help users quickly identify the most frequent words or keywords within a text corpus.
- Key Themes Identification: Word clouds provide an intuitive way to identify the dominant themes or topics in a large body of text.
- Attractiveness and Engagement: Word clouds are visually engaging, making them ideal for presentations and reports, capturing the audience's attention.



Demo – Creating Word Cloud



Introduction to Symbol Maps

# Introduction to Symbol Maps

Symbol maps are a powerful data visualization technique used in Tableau to display geographical or location-based data. They represent data points using symbols or markers placed on a map, where the size, shape, and color of the symbols can be customized to convey additional information. Symbol maps allow users to quickly identify patterns, trends, and spatial relationships within the data, making them an essential tool for geographic analysis.

- Geospatial Data Visualization: Symbol maps are designed to visualize data with geographical or location-based attributes, such as latitude and longitude.
- Spatial Patterns Identification: They help users identify spatial patterns and trends, such as concentration, dispersion, or clusters of data points.
- Data Comparison Across Regions: Symbol maps allow for the comparison of data values across different geographic regions.
- Symbol Customization: Users can customize symbols based on data attributes, enabling the representation of multiple dimensions (e.g., size, shape, color) on the map.



Demo - Creating Symbol Maps

Q. How can you customize the symbols on a symbol map?

- a. By changing the chart type
- b. By adding more data points
- c. By adjusting the axis scales
- d. By modifying the symbol size and color properties



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Introduction to Filled Maps

## **Introduction to Filled Maps**

Filled maps are a compelling data visualization technique used in Tableau to display geographical or location-based data on a map. Unlike symbol maps that use markers or symbols, filled maps represent data by coloring geographic regions based on their data values. Filled maps are highly effective in conveying spatial patterns, distribution, and regional variations within the data.

- Geospatial Data Representation: Filled maps are designed to visualize data with geographical attributes, such as countries, states, cities, or postal codes.
- Spatial Patterns and Trends: They help users identify spatial patterns, trends, and disparities across different geographic regions.
- Data Comparison Across Regions: Filled maps allow easy comparison of data values across different regions, highlighting variations and regional differences.
- Color Gradation: Users can utilize color gradients to represent data values, emphasizing higher or lower values on the map.



Demo - Creating Filled Maps



# Introduction to Histograms

## **Introduction to Histograms**

Histograms are a powerful data visualization technique used in Tableau to display the distribution of continuous data. They divide the data into equal intervals, or "bins," and represent the frequency or count of data points falling within each bin using bars. Histograms are an effective tool for understanding the shape, central tendency, and spread of data, allowing users to identify patterns and outliers within the dataset.

- Continuous Data Distribution: Histograms are designed to visualize the distribution of continuous data, such as age, income, or test scores.
- Data Distribution Patterns: They help users quickly identify the shape of the data distribution, such as normal, skewed, or bimodal.
- Central Tendency and Spread: Histograms provide insights into the central tendency (mean, median) and spread (variance, standard deviation) of the data.
- Outlier Detection: Users can spot outliers or unusual data points that fall far from the bulk of the data.



Demo - Creating Histograms

Q. How is the width of each bar determined in a histogram?

- a. By the number of data points in each category
- b. By the size of the dataset
- c. By the range of data values in each bin
- d. By the number of colors used in the chart



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# Introduction to Area Chart

#### Introduction to Area Chart

Area charts are a versatile data visualization technique used in Tableau to display the trend and distribution of data over time or across different categories. They represent data points using connected data lines and fill the area between the lines and the horizontal axis, creating a visually appealing depiction of the data's magnitude and variation.

- Trend Visualization: Area charts are designed to showcase trends and patterns in data over time or across categories.
- Cumulative Data Representation: They are effective in illustrating cumulative data values, such as total sales or revenue.
- Data Comparison: Area charts enable easy comparison between multiple data series, providing insights into relative performance.
- Data Variation: Users can identify data variations and fluctuations by observing the area's width between the data lines.



Demo - Creating Area Chart

Q. How are data points connected in an area chart?

- a. With bars
- b. With dots
- c. With lines
- d. With filled areas



Q. How are data points connected in an area chart?

- a. With bars
- b. With dots
- c. With lines
- d. With filled areas





## **Summary**

- Revealed correlations between continuous variables for trend identification.
- Displayed proportions and comparisons within datasets.
- Depicted hierarchical data structures with nested rectangles.
- Visualized density and relationships between categorical variables.
- Compared three variables and relative data sizes simultaneously.
- Explored symbol maps, filled maps, histograms, and area charts.

## **Activity 1**

#### **Pre-requisites:**

- Basic understanding of Tableau's interface.
- A sample dataset with at least one categorical variable and one numerical variable.

#### Scenario:

As an aspiring data analyst, you are tasked with creating a simple bar chart using Tableau to visualize the number of sales for different products. The dataset contains information about various products and the corresponding sales quantities.

#### **Expected Outcome:**

The final result of the activity should be a bar chart displaying the number of sales for each product. The chart should have clear labels, axis titles, and an appropriate color scheme for easy understanding.

#### Steps:

- Connect Data
- Drag Data to Workspace
- Choose Chart Type
- Customize Chart
- Save and Share

# Session Feedback



### **Next Session:**

Mastering Data Manipulation and Visualization in Tableau

# **THANK YOU**

Please complete your assessments and review the self-learning content for this session on the **PRISM** portal.

