

Tableau

Lesson 00: Course Overview



Course Audience

➤ This course is designed for:





Course Goals and Non Goals

- Course Goals
 - To understand Tableau basics and reporting





Pre-requisites

- Good knowledge of Informatica
- Fair knowledge of programming



Intended Audience

- Professional Data warehousing experts, or anyone requiring a foundation knowledge in ETL process





Day Wise Schedule

➤ Day 1

Lesson 1: Introduction to Tableau and Field Types & Visual Cues

➤ Day 2

Lesson 2: Data Connections

➤ Day 3

Lesson 3: Data Connections Contd..

➤ Day 4

Lesson 4: Organizing & Simplifying Data

➤ Day 5

Lesson 5: Formatting and Annotations

➤ Day 6

Lesson 6: Special Field Types contd.. and Tableau-generated fields



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- Lesson 1: Introduction to Tableau and Field Types & Visual Cues
 - What is Tableau?
 - The Tableau Environment
 - Tableau Workbooks and Sheets
 - Tableau Build Data Views (Manual),
Build Data Views (Automatic)
 - Creating a Basic Connection
 - Application terminology and definitions
 - View terminology and definitions
 - Fields on shelves
 - Visual cues for fields
 - Fields in the data window
 - Data terminology and definitions



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➤ Lesson 2: Data Connections

- Connecting to Tableau Data Server

- From the same database , Understand connection options

- Working with extracts

- Custom SQL Data Connection

➤ Lesson 3: Data Connections Contd..

- Database joins

- Database blending

- Cross database joins



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➤ Lesson 4: Organizing & Simplifying Data

- Filtering

- Sorting

- Creating a Combined Field

- Grouping

- Sets

- Drilling, Hierarchies

- Grand Totals, Sub-totals, and Changing Aggregation

- Bins

➤ Lesson 5: Formatting and Annotations

- Use spatial analysis

- Effectively use titles, captions and tooltips (tutorial)



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Format results with edit axes

Formatting Your View

Format results with mark labels and annotations

➤ Lesson 6: Special Field Types contd.. and Tableau-generated fields

Date hierarchies

Different date parts on different shelves

Discrete and continuous date parts

Continuous dates

Custom dates

Define a fiscal year

Relative date filtering



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Date hierarchies and OLAP considerations

Measure values and names (tutorial)

When to use measure values and names

Number of records

Generated latitude and longitude