Connecting to & Preparing Data

**Create and save data connections**

• Create a live connection to a data source

• Explain the differences between using live

Connections versus extracts

• Create an extract

• Save metadata properties in a . TDS

**Modify data connections**

• Add a join

• Add a blend

• Add a union

**Manage data properties**

• Rename a data field

• Assign an alias to a data value

• Assign a geographic role to a data field

• Change data type for a data field (number,

date, string, boolean, etc.)

• Change default properties for a data field

(number format, aggregation, color, date

format, etc.)

Exploring & Analyzing Data

**Create basic charts**

• Create a bar chart

• Create a line chart

• Create a scatterplot

• Create a map using geographic data

• Create a combined axis chart

• Create a dual axis chart

• Create a stacked bar

• Create a chart to show specific values

(crosstab, highlight table)

**Organize data and apply filters**

• Create a visual group

• Create a group using labels

• Create a set

• Organize dimensions into a hierarchy

• Add a filter to the view

• Add a context filter

• Add a date filter

**Apply analytics to a worksheet**

• Add a manual or a computed sort

• Add a reference line or trend line

• Use a table calculation

• Use bins and histograms

• Create a calculated field (e.g. string, date,

Simple arithmetic)

• Add a parameter

Sharing Insights

**Format view for presentation**

• Use color

• Use bolding

• Use shapes

• Use viz animations

• Change size of marks

• Select fonts

**Create and modify a dashboard**

• Create a dashboard layout

• Add interactive or explanatory elements

• Add dashboard actions

• Modify existing dashboard layout for mobile devices

• Create a story using dashboards or views

• Share a twbx as a PDF

• Share a twbx as an image

Understanding Tableau Concepts

**Dimensions and measures**

• Explain what kind of information dimensions usually contain

• Explain what kind of information measures usually contain

**Discrete and continuous fields**

• Explain how discrete fields are displayed in Tableau

• Explain how continuous fields are displayed in Tableau

• Explain the difference between discrete date parts and continuous date values in Tableau

**Aggregation**

• Explain why Tableau aggregates measures

• Describe how an aggregated measure changes when dimensions are added to the view