Tableau Desktop Specialist Study Guide

The Tableau Specialist exam format changed in mid-2021. The exam is now administered by Pearson, and features 45 multiple-response and multiple-choice questions. The current exam does not feature any hands-on questions, and you cannot use Tableau Desktop or any other outside resources during the exam. Free Specialist practice questions are available here.

Domain 1: Connecting to & Preparing Data

1.1 Create live connections and extracts

1.1.1 Create a live connection to a data source - *live connection is the default when you connect to a data source*
1.1.2 Explain the differences between using live connections versus extracts
1.1.3 Create an extract
1.1.4 Save metadata properties in a .TDS
1.1.5 Create a data source that uses multiple connections - difference between a "data source" and a "connection"

1.2 Create and manage the data model

1.2.1 Add relationships to a data source
1.2.2 Add joins and unions
1.2.3 Explain when to use a join versus a relationship - relationships are recommended except under conditions mentioned here

1.3 Manage data properties

1.3.1 Rename a data field
1.3.2 Assign an alias to a data value
1.3.3 Assign a geographic role to a data field
1.3.4 Change data type for a data field (number, date, string, Boolean, etc.)
1.3.5 Change default properties for a data field (number format, aggregation, color, date format, etc.)

Domain 2: Exploring & Analyzing Data

2.1 Create basic charts

2.1.1 Create a bar chart
2.1.2 Create a line chart
2.1.3 Create a scatterplot
2.1.4 Create a map using geographic data

2.1.5 Create a combined axis chart - *blended axis is another term for combined axes*
2.1.6 Create a dual axis chart
2.1.7 Create a stacked bar
2.1.8 Create a density map
2.1.9 Create a chart to show specific values (crosstab, highlight table)

2.2 Organize data and apply filters

2.2.1 Create groups by using marks, headers, and the data pane
2.2.2 Create sets by using marks and the data pane
2.2.3 Organize dimensions into a hierarchy
2.2.4 Add a filter to a view
2.2.5 Add a date filter - see also this on relative date filters

2.3 Apply analytics to a worksheet

2.3.1 Add a manual or a computed sort - *note that the sort is computed unless the document explicitly mentions a manual sort*
2.3.2 Add a reference line
2.3.3 Use a quick table calculation
2.3.4 Use bins and histograms
2.3.5 Create a calculated field (e.g. string, date, simple arithmetic)
2.3.6 Explain when to use a parameter - in a calculation, in a filter, in a reference line, swamp measures
2.3.7 Display totals on a worksheet

Domain 3: Sharing Insights

3.1 Format view for presentation

3.1.1 Use color from the marks card
3.1.2 Configure fonts
3.1.3 Format marks as shapes
3.1.4 Configure viz animations
3.1.5 Change size of marks
3.1.6 Show and hide legends

3.2 Create and modify a dashboard

3.2.1 Add worksheets to a dashboard
3.2.2 Add interactive elements for consumers (e.g. show filters, data highlighter, tooltips)
3.2.3 Add dashboard actions (e.g. filter action, highlight action, parameter control, URL action)
3.2.4 Configure a dashboard layout and create device-specific dashboards
3.2.5 Create a story and a story point

3.3 View and share workbook data

3.3.1 Share a workbook (e.g. twbx as a PDF or an image, publish to Tableau Server)
3.3.2 View and export underlying data
3.3.3 Export to Microsoft PowerPoint

Domain 4: Understanding Tableau Concepts

4.1 Understand dimensions and measures

4.1.1 Explain what kind of information dimensions usually contain
4.1.2 Explain what kind of information measures usually contain
4.1.3 Explain the difference between dimensions and measures

4.2 Understand discrete and continuous fields

4.2.1 Explain how discrete fields are displayed
4.2.2 Explain how continuous fields are displayed
4.2.3 Explain the difference between discrete date parts and continuous date values

4.3 Understand aggregations

4.3.1 Explain the default aggregation for measures
4.3.2 Describe how an aggregated measure changes when dimensions are added to a view