

Syllabus – Data Visualisation with Power BI & Tableau

Power BI

Session 1 (Quick Start Power BI Service)

- Get Power BI Tools
- Introduction to Tools and Terminology
- Dashboard in Minutes
- Refreshing Power BI Service Data
- Interacting with your Dashboards
- Sharing Dashboards and Reports

Session 2 (Getting and Transforming Data with Power BI Desktop)

- Introduction to Power BI Desktop
- Getting Data: Excel vs Power BI Desktop & Service
- Naming for Q&A
- DirectQuery vs Import Data

Session 3-4 (Modeling with Power BI)

- Introduction to Modeling
- Setup and Manage Relationships
- Cardinality and Cross Filtering
- Default Summarization & Sort by
- Creating Calculated Columns
- Creating Measures & Quick Measures

Session 5-10 (Power BI Desktop Visualisations)

- Creating Visualisations
- Color & Conditional Formatting
- Setting Sort Order
- Scatter & Bubble Charts & Play Axis
- Tooltips
- Slicers, Timeline Slicers & Sync Slicers
- Cross Filtering and Highlighting
- Visual, Page and Report Level Filters
- Drill Down/Up
- Hierarchies
- Constant Lines

- ❖ Course Duration: - 6 Months
- ❖ Live Classes

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- Tables, Matrices & Table Conditional Formatting
- KPI's, Cards & Gauges
- Map Visualisations
- Custom Visuals
- Managing and Arranging
- Drillthrough
- Custom Report Themes
- Grouping and Binning
- Bookmarks & Buttons
- Decomposition Tree

Session 11 (Power BI Service Visualisation Tools)

- Introduction to the Power BI Service
- Standalone Tiles
- Data Driven Alerts (Power BI Pro/Premium)
- Quick and Related Insights
- Custom Q&A

Session 12-13 (Publishing and Sharing)

- Sharing Options Overview
- Publish from Power BI Desktop
- Publish Reports to Web
- Printing, PDFs and Exporting to PowerPoint
- Row Level Security (Power BI Pro)
- Export Data from a Visualisation
- Publishing for Mobile Apps

Session 14 (Refreshing Datasets)

- Understanding Data Refresh
- Personal Gateway (Power BI Pro and 64-bit Windows)
- Replacing a Dataset
- Troubleshooting Refreshing

Session 15 (Power BI and Excel Together)

- Options for Publishing from Excel

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- Pin Excel Elements to Power BI (Excel 2010-2013)
- Excel Publish: Upload and Export to Power BI
- Sharing Published Excel Dashboards (Power BI Pro or Premium)

Tableau

Session 1 (Getting Started)

- The Tableau Interface
- Distributing and Publishing

Session 2-3 (Tableau Prep)

- Getting Started with Tableau Prep Builder
- The Tableau Prep Builder Interface
- The Input Step
- The Cleaning Step
- Group and Replace
- The Profile Pane
- The Pivot Step
- The Aggregate Step
- The Join Step
- The Union Step
- The Output Step
- Tableau Prep Conductor

Session 4-5 (Connecting to Data)

- Relationships
- Managing Metadata
- Managing Extracts
- Saving and Publishing Data Sources
- Connect to Data from the Web
- Data Prep with Text and Excel Files
- Join Types with Union
- Data Blending
- Additional Data Blending Topics
- Connecting to PDFs

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- Connecting to Cubes

Session 6-8 (Visual Analytics)

- Getting Started with Visual Analytics
- Drill Down and Hierarchies
- Sorting
- Grouping
- Additional Ways to Group
- Creating Sets
- Working with Sets
- Set Actions
- Ways to Filter
- Using the Filter Shelf
- Interactive Filters
- Where Tableau Filters
- Additional Filtering Topics
- Parameters
- Dynamic Parameters
- Parameter Actions
- Formatting
- The Formatting Pane
- Basic Tooltips
- Viz in Tooltip
- Trend Lines
- Reference Lines
- Explain Data
- Forecasting
- Clustering
- Analysis with Cubes and MDX

Session 9-10 (Dashboards and Stories)

- Getting Started with Dashboards and Stories
- Building a Dashboard
- Dashboard Objects
- Dashboard Formatting
- Dashboard Interactivity Using Actions

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- Dashboard Extensions
- Device Designer
- Story Points

Session 11-12 (Mapping)

- Getting Started with Mapping
- Maps in Tableau
- Editing Unrecognized Locations
- Spatial Files
- Spatial Joins
- The Density Mark Type (Heat maps)
- Expanding Tableau's Mapping Capabilities
- Custom Geocoding
- Polygon Maps
- Mapbox Integration
- WMS: Web Mapping Services
- Background Images

Session 12-13 (Calculations)

- Getting Started with Calculations
- Calculation Syntax
- Intro to Table Calculations
- Modifying Table Calculations
- Introduction to LOD Expressions
- Aggregate Calculations
- Date Calculations
- Logic Calculations
- String Calculations
- Number Calculations
- Type Calculations
- Conceptual Topics with LOD Expressions
- Aggregation and Replication with LOD Expressions
- Nested LOD Expressions
- How to Integrate R and Tableau
- Using R within Tableau

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Session 14 (Why is Tableau Doing That?)

- Understanding Pill Types
- Measure Names and Measure Values
- Aggregation, Granularity, and Ratio Calculations
- Filtering for Top Across Panes

Session 15-16 (How To)

- Using a Parameter to Change Fields
- Finding the Second Purchase Date with LOD Expressions
- Cleaning Data by Bulk Re-aliasing
- Bollinger Bands
- Bump Charts
- Control Charts
- Funnel Charts
- Step and Jump Lines
- Pareto Charts
- Waterfall Charts



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