

Tableau Intermediate



Length: 2.5 Days / 5 Half Days

Overview: This class is designed for someone who has moderate experience with Tableau and is ready to take basic skills to an advanced level. This class will put more tools in your analytical toolbox, such as more complex calculations, more powerful interactivity, more complex chart types, and more ways to slice and dice your data to mine for critical insights.

Objectives:

- Create complex calculations and dynamic parameters.
- Build interactive dashboards for decision makers connecting the “why” to the “what”
- Produce advanced charts for easier comparisons.
- Apply advanced formatting and data visualization best practices.
- Slice data into segments using sets and clustering to mine for critical insights.

Calculations and Interactivity

- Calculated Fields
- Aggregate Calculations & Ratios
- Logical Calculations
 - If/Then
 - IfNull
 - IsNull
 - ZN
- Date Calculations
 - DateAdd
 - DateDiff
 - Today()
- Parameters
 - Pre-defined Lists for Faster Filtering
 - Top N Filter
 - Reference Line Parameter
 - Swapping Dimensions or Measures in a View
- Using Actions to Create Interactive Dashboards
 - Filter Actions
 - Highlight Actions
 - URL Actions
- Combining Parameters and Actions: On Demand Charts

- Advanced Chart Types
 - Bar in Bar Chart
 - Bulletgraphs
 - Sparklines
 - Control Charts

Advanced Analytics and Storytelling

- Advanced Formatting & Dashboard Best Practices
 - Layout Containers
 - Floating Elements
 - When to Use Which
 - Effective Dashboard Layouts
 - Layout Best Practices
 - Titles and Labeling
 - Color Choices
 - Do
 - Don't
 - Guided Analytics
- Advanced Tooltips
 - Text with formatting and dynamic data woven in
 - Viz in tooltip
- Custom Shapes & Custom Color Palettes

continued

- Advanced Segmentation
 - Dynamic Sets
 - Top N Sets
 - Conditional Sets
 - Combined Sets
 - Set Actions Overview
 - Clustering
- Advanced Analytics
 - Reference Bands and Reference Distributions Explained
 - Reference bands
 - Reference Distributions
- 60, 80% of Total, Percentiles
- Quantiles
- Standard Deviation
- Box Plots
- Forecasting
- Storypoints
- To Publish a Workbook to Tableau Server

Prerequisites

Tableau Beginner

Materials

- All students will receive slides with lecture material, data and labs.
- Software needed on each student PC:
 - Microsoft Excel 2010 or later (2013 or later recommended)
 - Internet access
 - Tableau Desktop
- Related data and lab files will be provided

Other Tableau Courses Available: Tableau Beginner, Tableau Advanced and Tableau Prep