Tableau Training
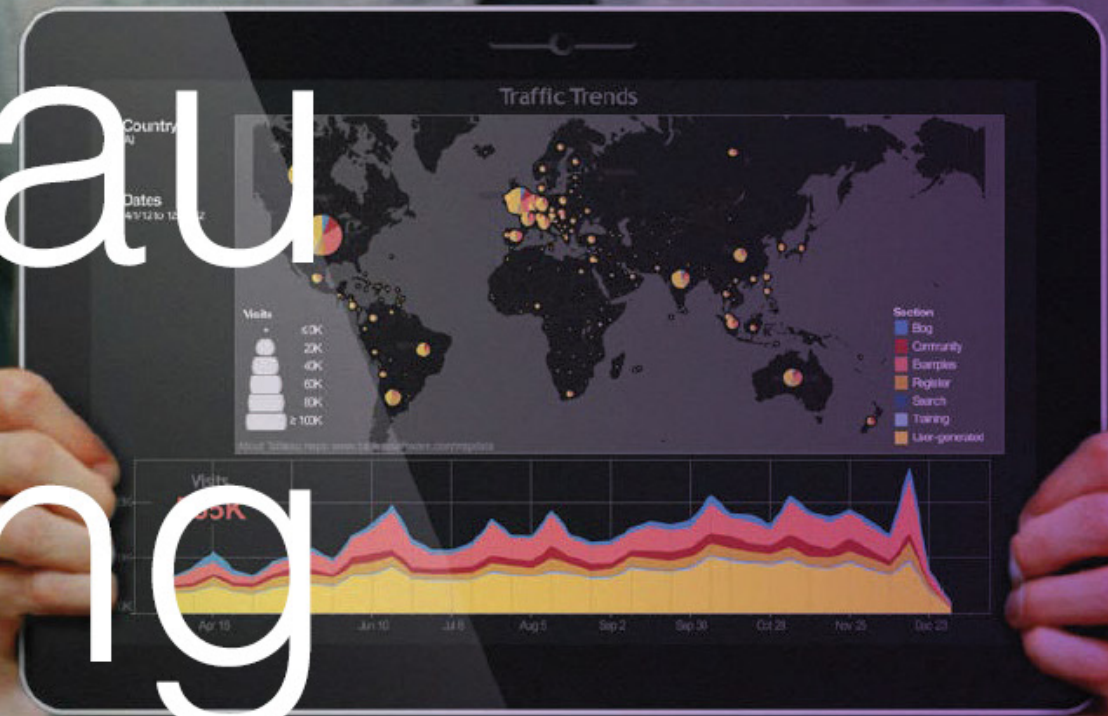
At **Tridant** we believe in enabling our customers to get the most out of their solutions.

"In addition to implementing onsite solutions, we can provide tailored training to put the power of analysis in your hands.

Whether you want to equip your business stakeholders with fundamental Tableau skills, or ensure comprehensive training for your power users, we can customise the right approach to suit your needs.

In this booklet you will find the complete list of topics that form part of our Tableau training offer, but you can chose any subset for your specific requirements.

We can hold training courses onsite at your location, and can facilitate custom data workshops to hone in on your specific data analytics issue.

Our training will ensure that your Tableau users are well equipped to tackle your Tableau analytics, reporting and data visualisation challenges and help you understand your data."

Tridant Solutions + Enablement = Your Success!

Fundamentals

Fundamentals

1 Connecting to and organising your data

How do I connect to various data sources?

a) Data Connection, Data Interpreter, Metadata view
- What's the best way to enable ad hoc analysis of my data?
- How can I bring order into the numerous fields contained in my dataset?
- My spreadsheets are pre-formatted, can I use them anyway?

b) Default Properties
- How can I save time when it comes to formatting my dimensions and measures?
- How can I prepare my data source most effectively for sharing?

c) Folders
- How can I find relevant and related fields more easily in my data window?

2 Simplifying your Data through Filters

What is the best way to limit the data in my visualisation?

What restrictions can I apply to my sensitive data that should only be visible to certain users?

3 Organising your Data

a) Groups
- How can I combine members within my data without having to go back to the data source?
- How can I identify data cleansing issues and what's an easy way to address them in the short term?
- Is there a way to create dimensions at a higher level of detail than those currently in my data?

b) Hierarchies
- How can I give my users the ability to drill-down in their reports?
- What's the best way to structure hierarchies in my data?
- What if I don't want my users to drill-down into dimensions which are in a hierarchy?

Fundamentals

5 Using Multiple Measures in a View

How can I show Revenue and Expenses in a single chart?

What are the most useful visualisations when I want to show a number of measures at the same time?

How do I create a chart that has bars and a line?

4 Working with Date Fields

What are the benefits of discrete and continuous date fields?

Why do some visualisations work only with dates while others don't accommodate a time view?

Why are there no smoothed lines in my line chart?

How can I change my Financial Year start date?

Fundamentals

6 Showing the Relationship between Numerical Values

How can I show correlations between two measures?

What statistical analysis can I use?

7 Viewing specific values

How can I create charts that are visual but still provide my users with the detailed information they need?

My users are used to tabular reports and I don't know how to convince them that visualisations might be a better choice. How can I create dashboards that help win them over?
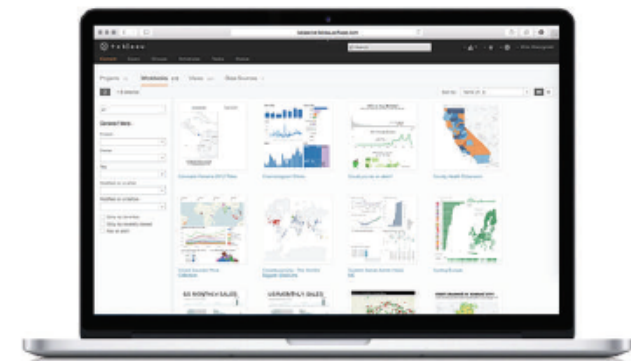
How can I enhance my existing tables to show important information more easily?

8 Customising your Data - Calculations, Table Calculations

How can I add additional measures to my data?

Can I create conditional formatting, dynamic headings, etc.?

My users want to see Running Totals, Percent of Total etc. How can I create these most easily without the need for a developer to add these measures into the underlying data?
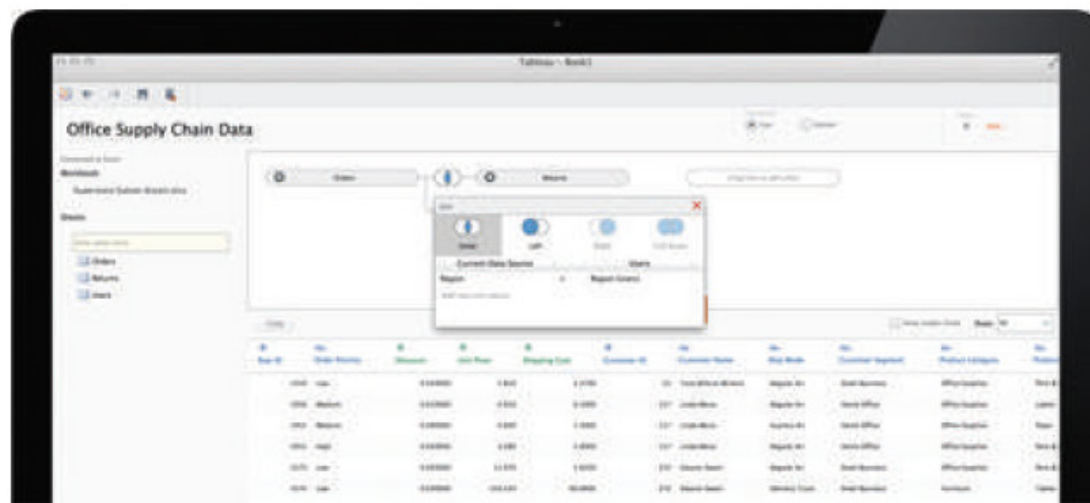
9 Distributions in your Data

My users have asked me for the spread of the data and want to see minimum and maximum data points. What are some visualisations I can crate for them?

I have survey response data, how can I best show how many people responded using the different response options?

10 Reference Lines

How can I display one measure relative to another?

We have budget and actual data, how can I best display our performance against a target?

Advanced

1 Single data sources vs multiple data sources

How can I connect my workbook to multiple data sources?

Can I join data from multiple data sources?

2 Advanced Table Calculations

What else can I do with table calculations?

Is there an easy way to calculate Year on Year growth?

3 Statistics and Forecasting

Can I use Tableau to model my data?

My statistics knowledge is a bit rusty, is there an easy way for doing Trend Analysis and Forecasting in Tableau?

What if I want to do MORE than the simple stuff?

4 Level of Detail Calculations

What if I want to show Average Sales by Sales rep but at a State level?

I don't want to include every dimension into my visualisation but I need to show the information in my tooltips, what can I do?

I can't get my head around the Fixed, Include and Exclude options. What's the best way to remember how they work?

5 Parameters

My users want to be in control of what they see in their report. How can I put them in charge of the visualisation?

I have to display everything on a single dashboard, but there isn't a lot of room. What's the best way to save space?

How can I create dynamic league ladders to analyse staff performance?

How can I dynamically change the measures displayed in a chart?

6 Tableau Geocoding

We have a lot of geographical data, can I plot this on a map in Tableau?

How can I enrich my Tableau maps with additional dimensions and measures?

Can I create custom maps?

7 Distributions in your Data

We use a lot of Pareto charts to display where most of our revenue is coming from. How can I create these charts in Tableau?

My users are interested in analysing the performance of cohorts within the data, what's a good way to do this?

8 Dashboards

So how do I build a dashboard?

Are there any rules when it comes to creating dashboards and visualisations?

How can I guide my users through a dashboard?

What's the best way to link one dashboard to the next?

What are some tips on creating a compelling story?

9   Data Visualisation

What are some of the basic design principles that I should follow?

How do I create beautiful visualisations?

My users are accustomed to seeing excel charts and tables, how do I make the transition to Tableau visualisations without alienating them?

10   Additional data visualisation topics

What are some of the new features in Tableau 9.1?

I heard about the 'Story' feature in Tableau, what is it and how do I use it?

How can I share my work with others?

I want to publish my report on Tableau Server. What do I need to know and how do I go about it?

11   Good and bad examples

What are some good examples we can use for guidance?

What are some examples of how NOT to do it?

Contact us today
to get started with **Tableau.**

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