

Tableau Course Syllabus

Course Timeframe:

- June 27 – July 28, 2022
- No class on July 4 - class will be on July 5 and 7

Course Days: Mondays and Thursdays

Course Time: 6:30 – 8 p.m.

Duration: 5 weeks

Course Format: This is a virtual, instructor led course.

Course Description:

The purpose of this course is to provide foundational knowledge of Tableau. It is targeted toward first-time users and developers. By the end of the course, participants will be confident in building charts and dashboards, and will know how to pursue additional information on their own to continue expanding their skills.

While there is a Tableau Certified Data Analyst certification, it is not offered as part of this course. Goodwill's Tableau course provides foundational knowledge and is a stepping stone to the certification exam. If you are interested in becoming certified after completing Goodwill's Tableau course, you can [learn more about the certification exam](#).

In this course you will learn:

1. The benefits of Tableau, including Tableau vs. Excel
2. How to navigate Tableau as a user, including interactivity and downloading data, PDFs, and PowerPoint presentations
3. Connecting to an Excel data source, developing crosstab views (aka pivots)
4. Creating calculated fields
5. Creating “download friendly” dashboards, including formatting, titles, and filter selectors
6. Creating bar and line graphs, as well as pie charts
7. Dual axis graphs
8. Visual design principles
9. Publishing dashboards to a server (even if the license doesn't allow)
10. Tips on searching for additional Tableau help on Google and YouTube

Course Learning Outcomes:

Students will be able to:

- Connect to your data.

- Edit and save a data source.
- Understand Tableau terminology.
- Use the Tableau interface / paradigm to effectively create powerful visualizations.
- Create basic calculations including basic arithmetic calculations, custom aggregations and ratios, date math, and quick table calculations.

Module 1 Overview

- What is Tableau.
- How does Tableau relate to Excel?
- Navigating Tableau as a user, including interactivity with visualizations, and learning how to download data, PDFs and PowerPoint
- Create a new Tableau workbook, connect to an Excel document as the data source (Sample Superstore comes with the Tableau install)
- Creating a crosstab (aka pivot) view

Module 1 Homework (15 Pts):

- Create a basic workbook using the Sample Superstore
- Replicate assigned visualization
- Publish and email the link to instructor

Module 2 Overview

- Creating bar and line graphs, as well as pie charts
- Dual axis graphs
- Creating calculated fields
- Filters
- Formatting

Module 2 Homework (15 Pts):

- Create a bar chart visualization to specification
- Create a time series line graph to specification
- Create a pie chart to specification
- Publish and email the link to instructor

Module 3 Overview:

- Creating a dashboard
- Adding sheets to dashboards
- User interactive filters
- Formatting and static elements

Module 3 Homework (15 Pts):

- Create a dashboard to specification

- Publish and email the link to instructor

Module 4 Overview

- Visual design principles
- Create a map visualization
- Adding totals
- Reference bands
- Tips on searching for additional help on the internet

Module 4 Homework (15 Pts):

- Read the following article: <https://www.tableau.com/learn/articles/data-visualization>.
- Review from sample published dashboards: <https://public.tableau.com/app/discover/viz-of-the-day>.
 - Download 1 to PDF that you find intuitive and aesthetically pleasing
 - Download 1 to PDF that you find unintuitive
 - Email both to me, with notes on what you like about one and dislike about the other

Final Project (40 Pts):

- Create and design a new workbook with at least 2 dashboards, incorporating prescribed elements, applying your own formatting/aesthetics. Publish and email the link to instructor.

Career Definitions:

Tableau is a tool that helps people and organizations become more data-driven with the most beloved modern analytics platform in the world. [Click here to see a list of 20 occupations that use Tableau.](#)

About the Instructor:

Laurel Rumph has over 30 years of experience with Data Analytics and Reporting, mostly from the major companies in the Charlotte market. This includes 15+ years at Wells Fargo (including legacy First Union/Wachovia), 4+ years at Bank of America and 5 years at Compass Group. She is currently working in Financial Crimes Analytics for Wells Fargo. She graduated in 1993 with a BSBA from UNCC, with Management Information Systems & Marketing majors.

She is currently living in the NC mountains (Ashe County) and enjoys hiking, biking, kayaking and is a Certified Yoga Instructor.