

# Introduction to Tableau – from data modelling to dashboard



The training introduces participants to the world of data analysis and data visualization using one of the leading Business Intelligence tools – Tableau.

The program focuses on the key functionalities of Tableau Desktop, enabling efficient data preparation, the creation of clear and insightful visualizations, and the development of interactive dashboards.

This training is an excellent starting point for individuals who are beginning their work with Tableau, as well as for those who want to organize and systematize their existing knowledge.



## Training recipients

The training is intended for:

- Individuals new to working with Tableau who want to gain a fundamental understanding of data visualization.
- Specialists interested in Business Intelligence tools that support data analysis and decision-making.
- Business users who want to analyze and present data in a visual and easy-to-understand way.



## Benefits

After completing the training, participants will:

1. Become familiar with the Tableau interface and key functionalities required to efficiently create visualizations.
2. Learn how to use dimensions, measures, parameters, data bins, and calculated fields in data analysis.

3. Gain the ability to prepare data sources and correctly select and adjust data types.
4. Understand how to create map-based visualizations and perform basic data transformations.
5. Acquire knowledge on building interactive dashboards and data stories.



## Training program

### 1. Introduction

- Overview of Business Intelligence tools
- Overview of Tableau Desktop
- Tableau Public - when to use
- Overview of the Tableau products family

### 2. Data Model

- Live and Extract data connections
- Different file types and data storage methods
- Single-table data sources
- Multi-table data models: facts and dimensions
- Data types and their role in report creation
- Data type conversions
- Physical and logical tables
- Role of JOINS and when to use them
- Data sources with multiple fact tables
- Role of lookup (dimension) tables

### 3. Creating Visualizations in Tableau

- Measures and dimensions in data visualization
- Role of shelves (Rows, Columns, Marks, Filters, Pages)
- Creating visualizations using the SHOW ME panel
- Manual creation of visualizations
- Changing aggregations in visualizations
- Sorting results
- Formatting visualizations
- Tooltips
- Reference lines

### 4. Working with Data

- Continuous and discrete data
- Dates aggregations
- Changing field roles from measures to dimensions
- Grouping data
- Data bins (numeric ranges)

### 5. Data Analysis

- Row-level calculations
  - Column-level aggregations
  - Table calculations
  - Calculation context (field, table, pane, etc.) and calculation direction (vertical, horizontal, or both)
  - Aliases
  - Grand totals and subtotals
  - Forecasting - introduction
  - Parameters - basic use cases
  - Conditional logic (IF statements)
  - Logical conditions
  - Basic arithmetic calculations
  - Date operations
  - Data type conversions
  - String operations
  - Logical expressions
6. Filtering
- Filtering at the data source level
  - Date filters: relative dates, date ranges, date intervals
  - Number filters: raw data and aggregated data
  - Top N filters
7. Introduction to Dashboard Creation
- Dashboard size and layout
  - Adding graphics (e.g., logos)
  - Tiled vs. Floating objects
  - Combining visualizations
  - Dashboard formatting
  - Creating interactions using filters and actions (introduction)
8. Introduction to Story Creation
- Adding story points
  - Annotations



Expected preparation of the participant

None



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## Language

Training: English