



01

Connect to data sources

- Identify data source
- Determine live connection vs. extract
- Connect to extracts
- Connect to files
- Connect to relational databases
- Connect to published data sources from a Tableau Server or Tableau Cloud site
- Replace the connected data source with another data source for an existing chart or sheet

02

Prepare data for analysis

- Assess data quality (completeness, consistency, accuracy)
- Perform cleaning operations
- Organize data fields into folders
- Use multiple data sources (establish relationships, create joins, union tables)
- Prepare data by using Data Interpreter, pivot, and split
- Create extract and data source filters

03

Customize fields

- Change default field properties (types, sorting, etc.)
- Rename columns
- Choose when to convert between discrete and continuous
- Choose when to convert between dimension and measure
- Create aliases

04

Create calculated fields

- Write date calculations
- Write string functions
- Write logical and Boolean expressions
- Write number functions
- Write type conversion functions
- Write aggregate functions
- Write basic spatial calculations

05

Create table calculations

- Moving average and window average
- Percent of total
- Running total
- Difference and percent of difference
- Percentile
- Index
- Ranking
- Apply quick table calculations
- Customize table calculations



06

Create and use filters

- Apply filters to dimensions and measures
- Configure filter settings including Top N, Bottom N, include, exclude, wildcard, and conditional
- Add filters to context
- Apply filters to multiple sheets and data sources

07

Create parameters to enable interactivity

- In calculations
- With filters
- With reference lines
- Set parameters to dynamically refresh

08

Structure the data

- Sets
- Bins
- Hierarchies
- Groups

09

Map data geographically

- Create symbol maps
- Create density maps
- Create choropleth maps (filled maps)
- Create mark layers

10

Summarize, model, and customize data by using the Analytics pane

- Totals and subtotals
- Reference lines
- Reference bands
- Average lines
- Trend lines
- Distribution bands
- Forecast by using default settings
- Customize a data forecasting model

11

Create Level of Detail (LOD) calculations

- Write FIXED LOD calculations
- Write INCLUDE LOD calculations
- Write EXCLUDE LOD calculations
- Write nested LOD calculations



12

Create charts

- Create basic charts from scratch (bar, line, pie, highlight table, scatter plot, histogram, tree map, bubbles, data tables, Gantt, box plots, area, dual axis, combo)
- Sort data (including custom sort)

13

Create dashboards and stories

- Combine sheets into a dashboard by using containers and layout options
- Add objects (containers, images, text)
- Create stories using story points

14

Add interactivity to dashboards

- Use filter in a dashboard
- Add filter, URL, and highlight actions
- Create interactivity using dynamic zone visibility
- Add navigation buttons
- Create interactivity using set and parameter actions
- Create show/hide buttons for dashboard objects

15

Format workbooks, worksheets, and dashboards

- Apply color, font, shapes, styling
- Add custom shapes and color palettes
- Add annotations
- Customize tooltips
- Apply padding
- Format gridlines, row-level and column-level bands, and shading
- Create a responsive design for specific device layouts

16

Publish Content

- Publish a workbook
- Publish a data source from Desktop or Prep
- Export content
- Publish a flow

17

Schedule data updates

- Schedule data extract refreshes

18

Manage published workbooks

- Create alerts
- Create subscriptions
- Create and save custom views
- Understand user roles and permissions
- Customize and distribute a published workbook