tableau
SOFTWARE
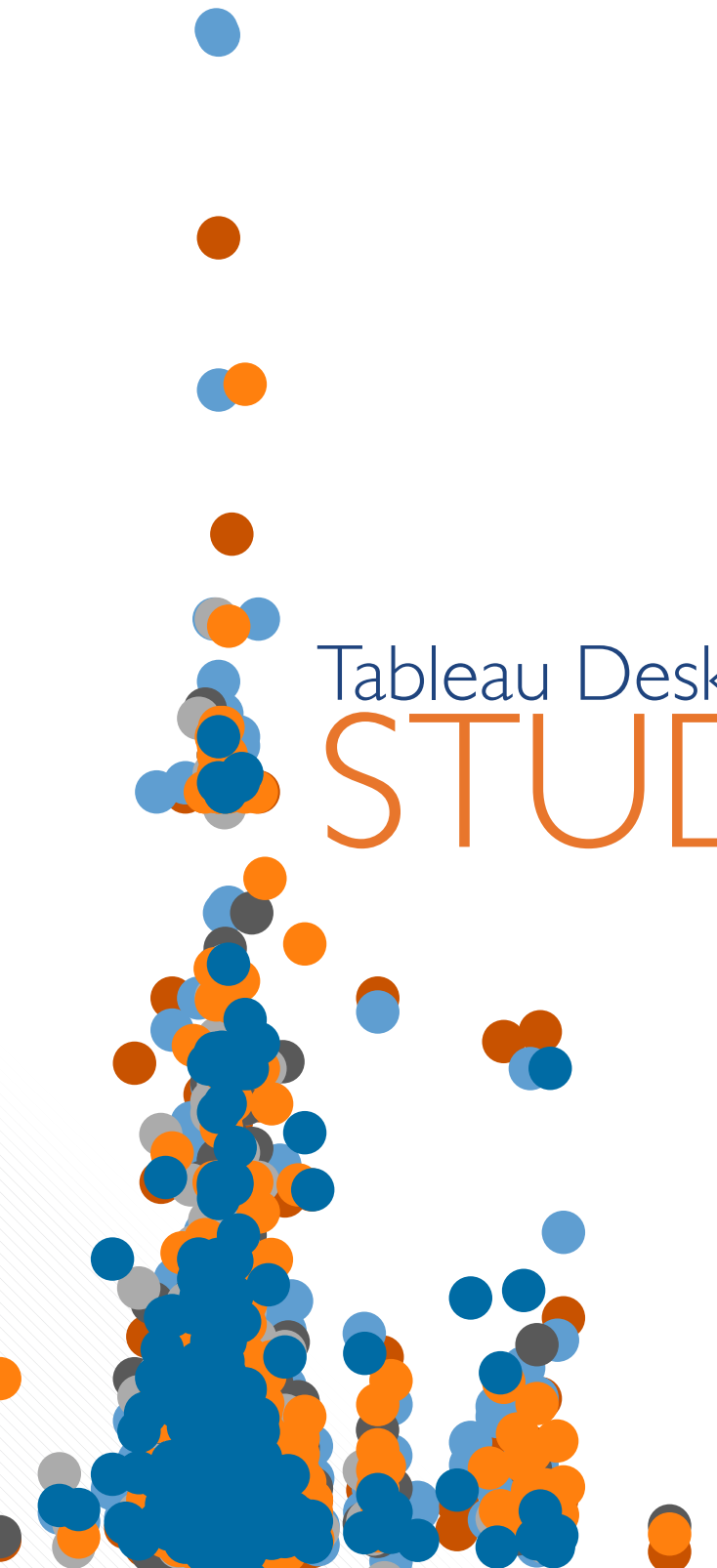
Tableau Desktop 6 Core Certification
STUDY GUIDE

The testing center computers will be pre-loaded with Tableau 6.1. The content described below, and the exam itself, are based on the feature set of Tableau 6.0. If you are currently using Tableau 5.2 or earlier, it is recommended that you either upgrade to Tableau 6.1 or trial Tableau 6.1 and understand the new capabilities prior to attempting the exam.

Recommended Preparation

Path A

- Attend the Tableau Fundamentals Training.

- Attend Tableau Advanced Training.

Path B:

- Watch these videos:

Intro

TITLE	LENGTH
Introductory Training - Creating Views http://www.tableausoftware.com/learn/tutorials/on-demand/introductory-training-creating-views	*20:12*
Introductory Training - Working with Data http://www.tableausoftware.com/learn/tutorials/on-demand/introductory-training-working-data	*07:59*
Introductory Training - Analyzing http://www.tableausoftware.com/learn/tutorials/on-demand/introductory-training-analyzing	*25:19*
Introductory Training - Formatting and Sharing http://www.tableausoftware.com/learn/tutorials/on-demand/introductory-training-formatting-and-sharing	*28:25*

Advanced

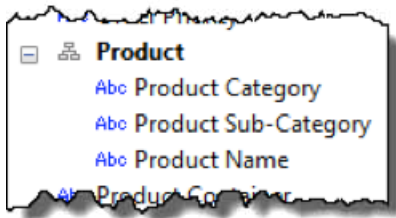| TITLE	LENGTH
Advanced Training - Filtering, Sorting & Grouping http://www.tableausoftware.com/learn/tutorials/on-demand/advanced-training-filtering-sorting-grouping	*22:23*
Advanced Training - Dates & Times http://www.tableausoftware.com/learn/tutorials/on-demand/advanced-training-dates-times	*18:13*
Advanced Training - Table Calculations http://www.tableausoftware.com/learn/tutorials/on-demand/advanced-training-table-calculations	*26:39*
Advanced Training - Basic Calculations http://www.tableausoftware.com/learn/tutorials/on-demand/advanced-training-basic-calculations	*21:06*
Advanced Training - Guided Analytics http://www.tableausoftware.com/learn/tutorials/on-demand/advanced-training-guided-analytics	*26:19*
Advanced Data - Data Blending http://www.tableausoftware.com/learn/tutorials/on-demand/advanced-data-data-blending	*25:43*
Advanced Training - Parameters http://www.tableausoftware.com/learn/tutorials/on-demand/advanced-training-parameters	*19:21*

Practice

All of the examples below use the "Sample-Superstore Sales (Excel).xls' file. It is not recommended that you use the saved data source of the same name, rather make a new connection to the excel file directly. When trying to recreate these examples, your dates and resulting visualizations may differ from the examples.

Be able to:

1. BASIC CONCEPTS AND DATA

1.1.   Build Views.

1.2.   Build Dashboards.

1.3.   Create a hierarchy.
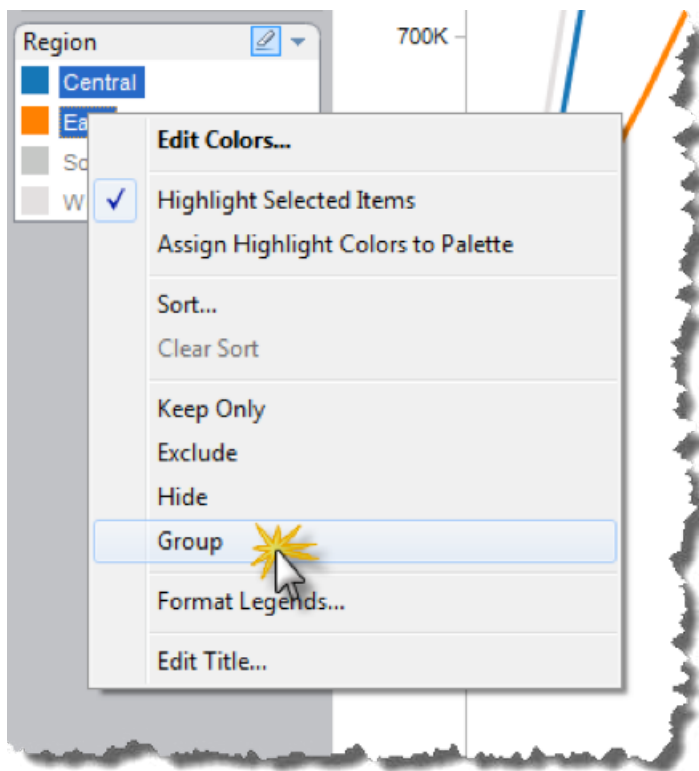

1.4.   Change a measure into a dimension.

1.5.   Hide unneeded fields.

1.6.   Change a field's formatting to display as currency or percentages.

1.7.   Understand the difference between 'Discrete' and 'Continuous'.

1. BASIC CONCEPTS AND DATA (con't)

1.8.   Group two or more items on a view or legend.

1. BASIC CONCEPTS AND DATA (con't)

1.9. Use 'Measure Names' and 'Measure Values'. Be able to explain what Measure Names and Measure Values are in Tableau, when they appear, and how to use them.

Product Sub-Category	Order Quantity	Product Base Margin	Profit	Sales	Shipping Cost	Unit Price
Appliances	10,949	241	98,023	747,333	6,922	31,734
Binders and Binder Accesso..	23,120	345	307,174	1,024,522	6,682	52,933
Bookcases	4,836	122	-33,171	821,982	8,596	32,553
Chairs & Chairmats	9,385	238	149,938	1,744,145	15,281	69,876
Computer Peripherals	19,263	450	94,534	796,554	4,069	32,235
Copiers and Fax	2,128	36	167,361	1,130,361	2,447	64,899
Envelopes	6,618	93	48,711	176,298	1,715	6,524
Labels	7,320	109	13,689	39,042	290	1,592
Office Furnishings	20,273	405	96,878	665,912	8,225	25,154
Office Machines	7,879	151	276,590	2,171,343	7,248	190,883
Paper	31,006	461	45,987	449,496	7,949	17,749
Pens & Art Supplies	17,116	340	7,552	167,525	2,049	6,100
Rubber Bands	5,010	96	-78	15,240	227	544
Scissors, Rulers and Trimme..	3,931	92	-7,799	80,996	671	6,101
Storage & Organization	13,957	370	2,517	1,099,774	10,149	44,826
Tables	9,048	244	-61,271	1,887,215	20,619	79,569
Telephones and Communica..	22,969	513	316,952	1,889,314	4,842	86,844

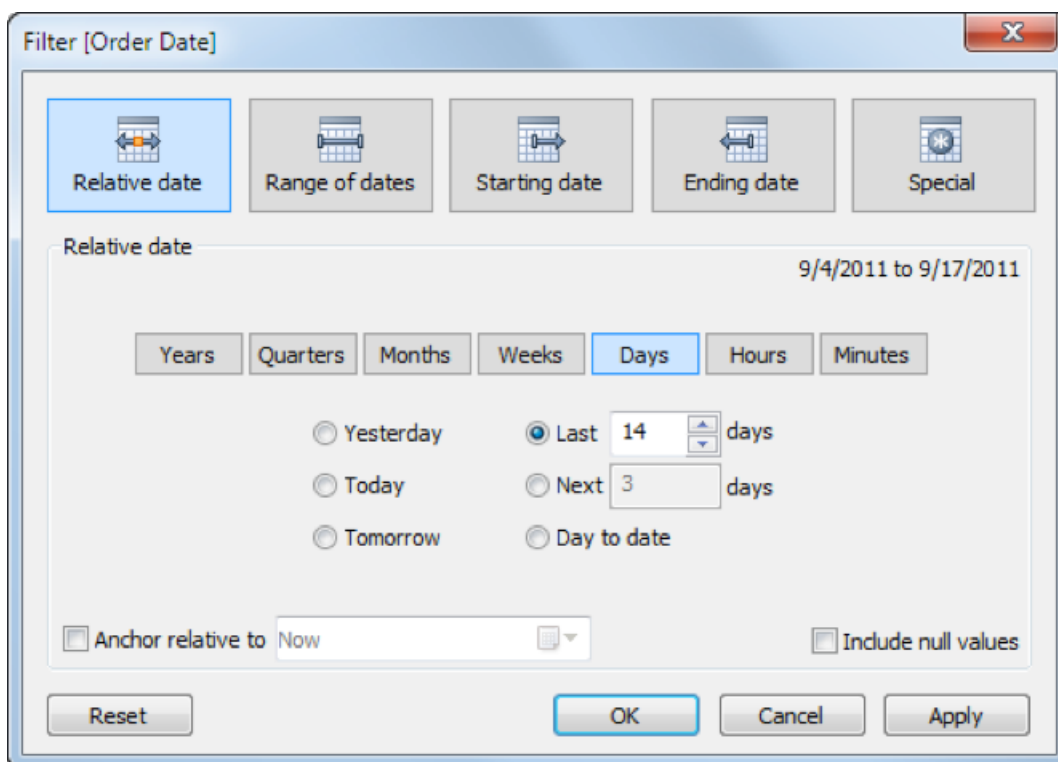# 1. BASIC CONCEPTS AND DATA (con't)

1.10. Format a cross-tab so that the shading changes on every third row.

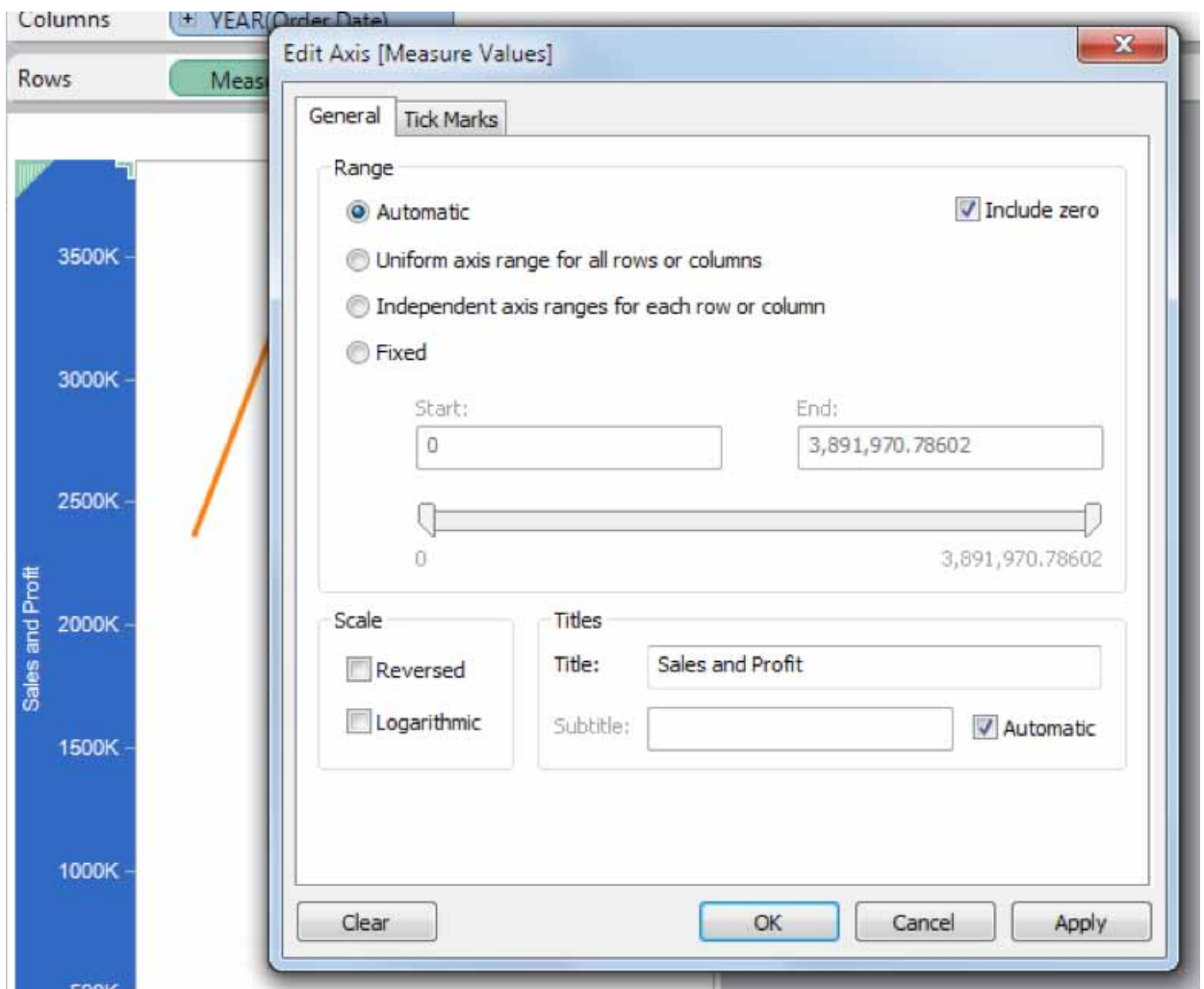| Product Sub-Category	Region			
	Central	East	South	West
Appliances	188,779	151,835	187,920	218,800
Binders and Binder Accesso..	260,320	229,520	240,083	294,599
Bookcases	206,170	212,900	233,571	169,341
Chairs & Chairmats	398,892	416,734	469,663	458,855
Computer Peripherals	172,392	145,256	245,985	232,921
Copiers and Fax	344,372	263,329	311,800	210,861
Envelopes	47,499	28,159	60,689	39,951
Labels	9,088	10,983	8,795	10,176
Office Furnishings	151,713	131,677	164,327	218,195
Office Machines	445,251	449,344	734,106	542,643
Paper	110,890	102,716	117,956	117,934
Pens & Art Supplies	44,400	32,407	50,746	39,971
Rubber Bands	2,881	3,784	3,439	5,136
Scissors, Rulers and Trimme..	8,579	7,641	43,022	21,754
Storage & Organization	263,535	209,005	277,454	349,781
Tables	565,172	369,520	487,273	465,250
Telephones and Communica..	473,347	418,181	495,150	502,636

1. BASIC CONCEPTS AND DATA (con't)
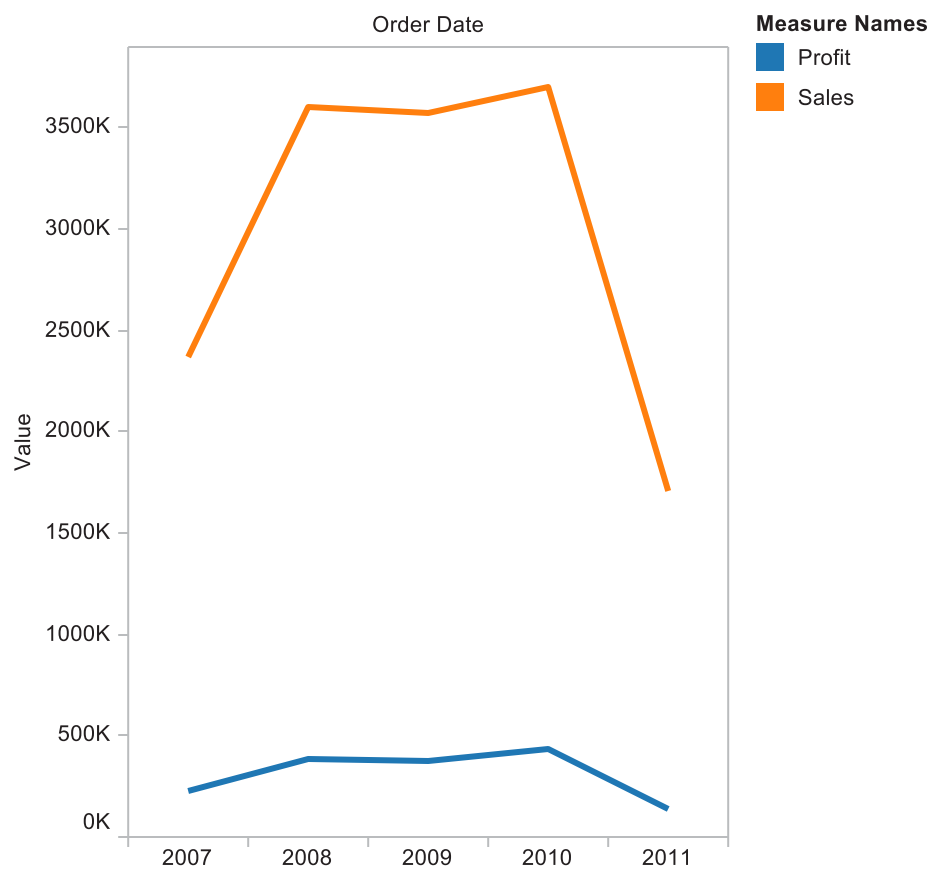
1.11. Filter a view to the last 14 days.

1. BASIC CONCEPTS AND DATA (con't)
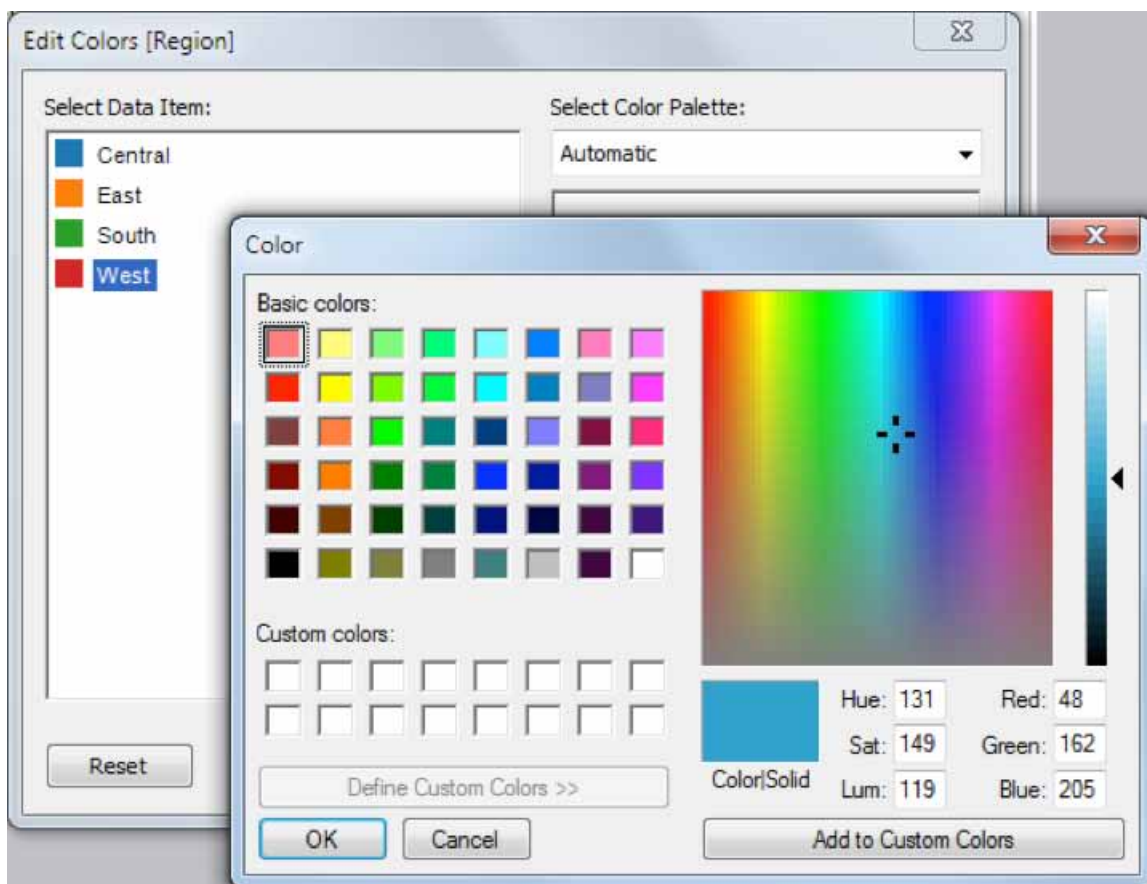
1.12. Put two or more measures on a single axis.

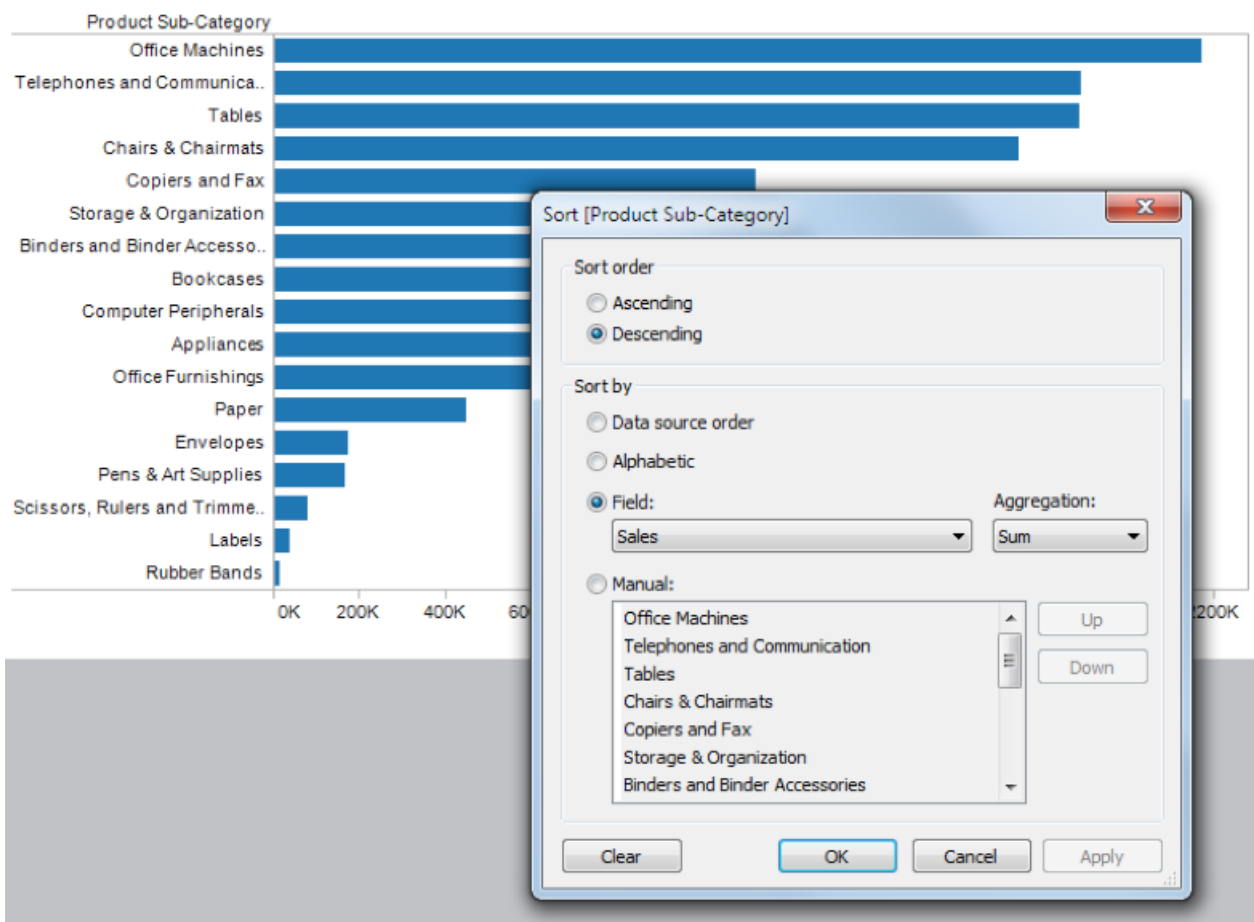# 1. BASIC CONCEPTS AND DATA (con't)

1.13. Change the label of an axis.

Order Date

Measure Names
- ■ Profit
- ■ Sales

1. BASIC CONCEPTS AND DATA (con't)

1.14. Adjust color legends by using a custom color.
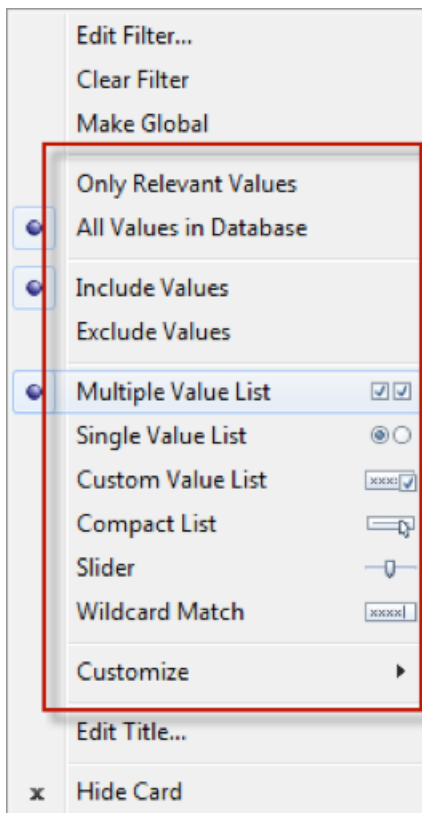
1. BASIC CONCEPTS AND DATA (con't)

1.15. Sort dynamically. Be able to explain how dynamic sorts differ from clicking on the sort button on the tool bar.

1. BASIC CONCEPTS AND DATA (con't)

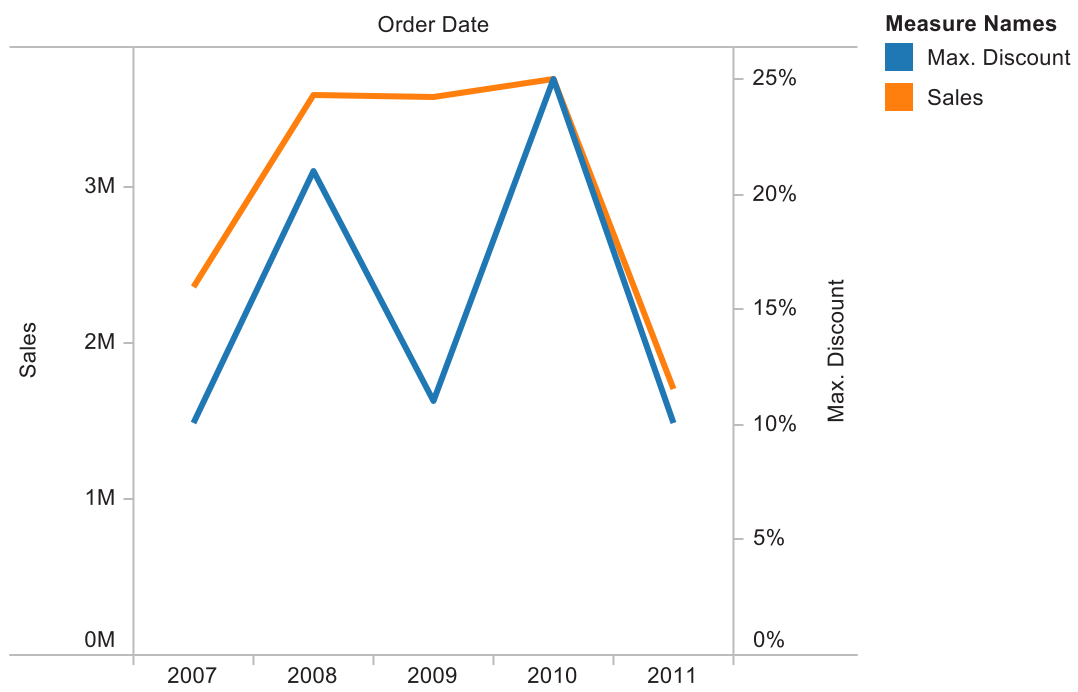1.16. Show Quick Filters.

1.17. Change Quick Filter modes.

1. BASIC CONCEPTS AND DATA (con't)

1.18. 'Make Global' filters.

1.19. Understand how 'Context Filters' interact with Top n filters.

1.20. Understand the difference between making a field discrete versus continuous. Why might you want to change this in Tableau? How can you tell if a field is discrete or continuous?

1.21. Understand your options when connecting 2 tables in Tableau Desktop.

1.22. What is a Saved Data Connection in Tableau and how might you use one?

1.23. Save a packaged workbook with your name as the title.
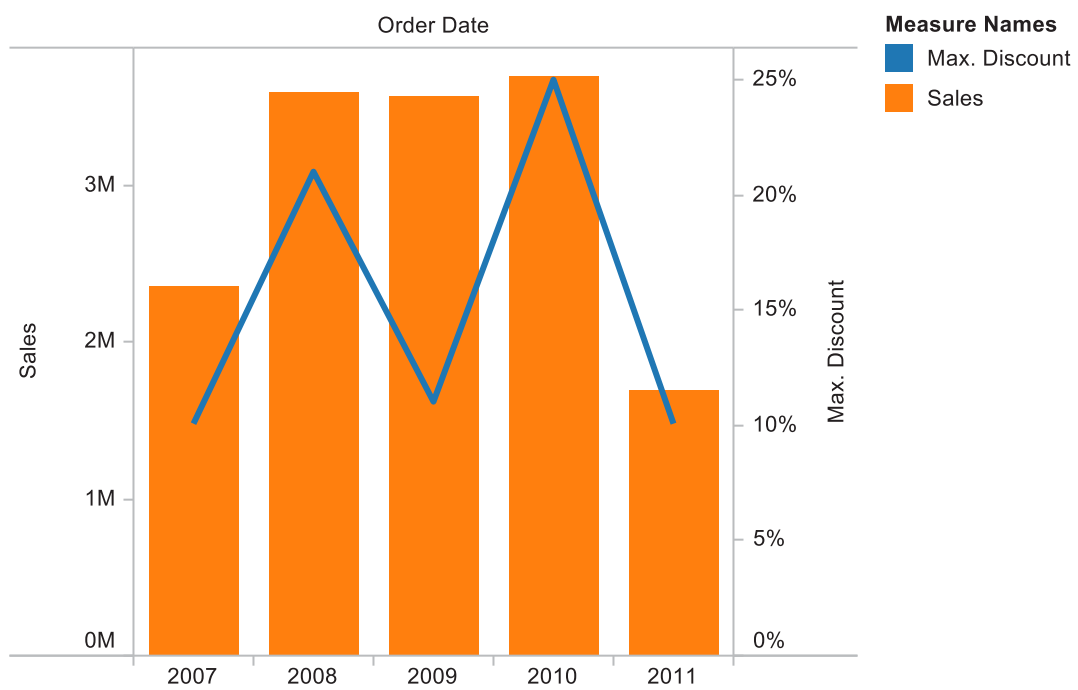
1.24. Publish to a Tableau Server.

2. BUILDING VIEWS

2.1. Create a dual axis chart.

2. BUILDING VIEWS (con't)

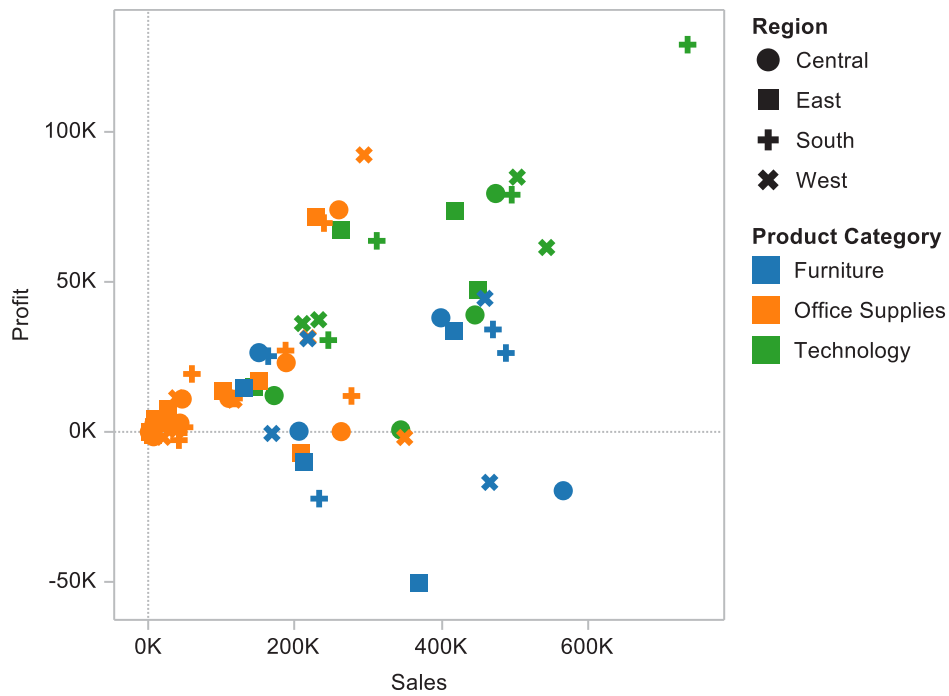2.2. Create a combination chart (e.g. bar and line).

2.3. Create a cross-tab with % of Total Sales and Sales.

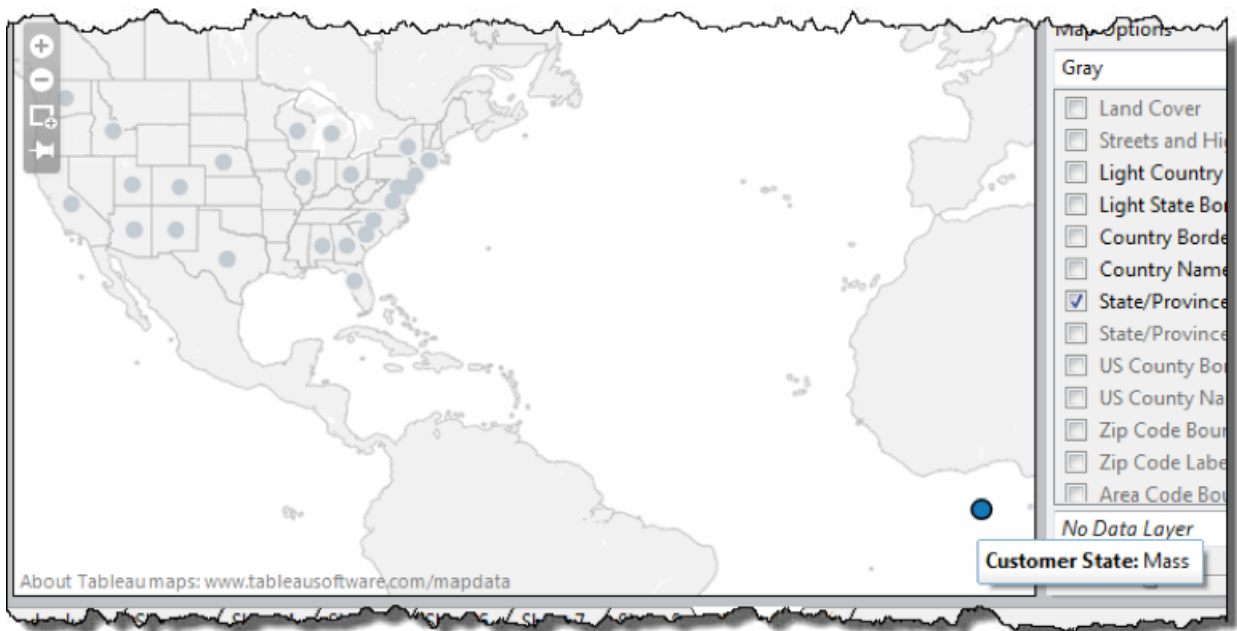| Region	Sales	% of Total Sales
Central	3,693,281	24.78%
East	3,182,989	21.35%
South	4,131,981	27.72%
West	3,898,802	26.15%

2. BUILDING VIEWS (con't)

2.4.   Create a scatter plot.
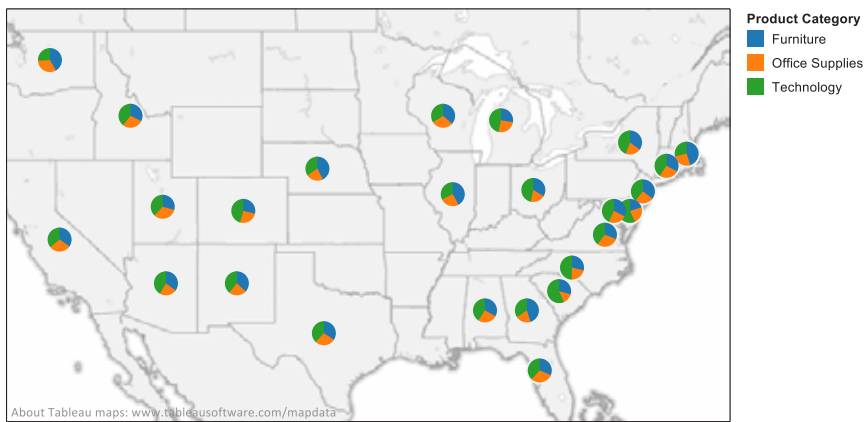
2. BUILDING VIEWS (con't)

2.5.   Create a map view and correct geo-coding errors (fix locations).

2.6.   Use shapes on a map and scatter plot.

2. BUILDING VIEWS (con't)
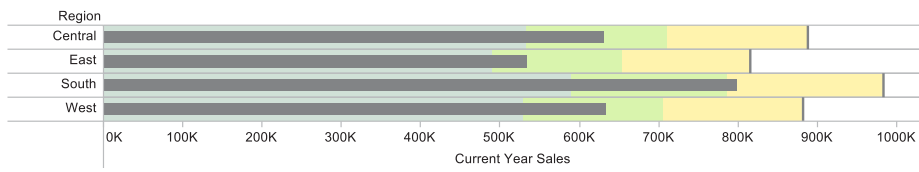
2.7. Create a pie chart on a map.

Product Category
- Furniture
- Office Supplies
- Technology

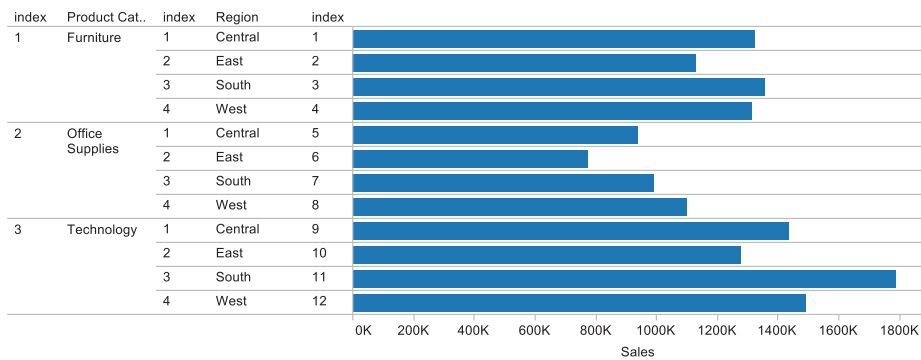About Tableau maps: www.tableausoftware.com/mapdata

2.8. Create a heat map.

2. BUILDING VIEWS (con't)

2.9.   Create a bullet chart.

3. ANALYTICS

3.1.   Create Calculated Fields.

3.2.   Use date functions such as DATEDIFF() and DATETRUNC().

3.3.   Use the INDEX() function to create row numbers/ranking.

index	Product Cat..	index	Region	index
1	Furniture	1	Central	1
		2	East	2
		3	South	3
		4	West	4
2	Office Supplies	1	Central	5
		2	East	6
		3	South	7
		4	West	8
3	Technology	1	Central	9
		2	East	10
		3	South	11
		4	West	12

3.4.   Use IF or CASE statements.

3.5.   Understand when and how to use aggregate calculations (custom aggregations).

3.6.   Create a profit ratio calculation which divides profit by sales. How does using Sum([Profit]) / Sum([Sales]) differ from [Profit] / [Sales]? Which calculation is a better practice and why?

3. ANALYTICS (con't)

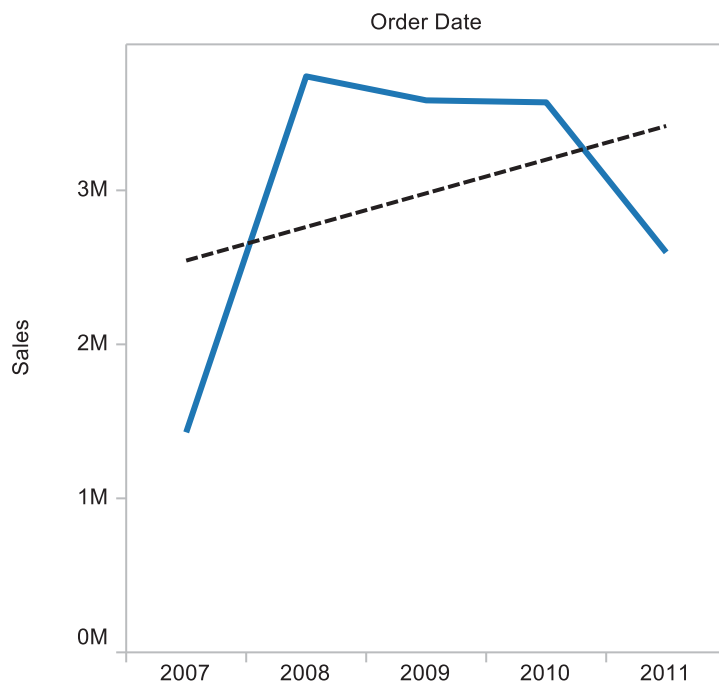3.7. Create and use a parameter to perform 'what if' analysis.

3.8. Work in 'dis-aggregated' mode.

3.9. Blend data from two or more datasources.

3.10. Apply a 'Quick Table Calculation' (e.g. Year Over Year Growth, Percent of Total).
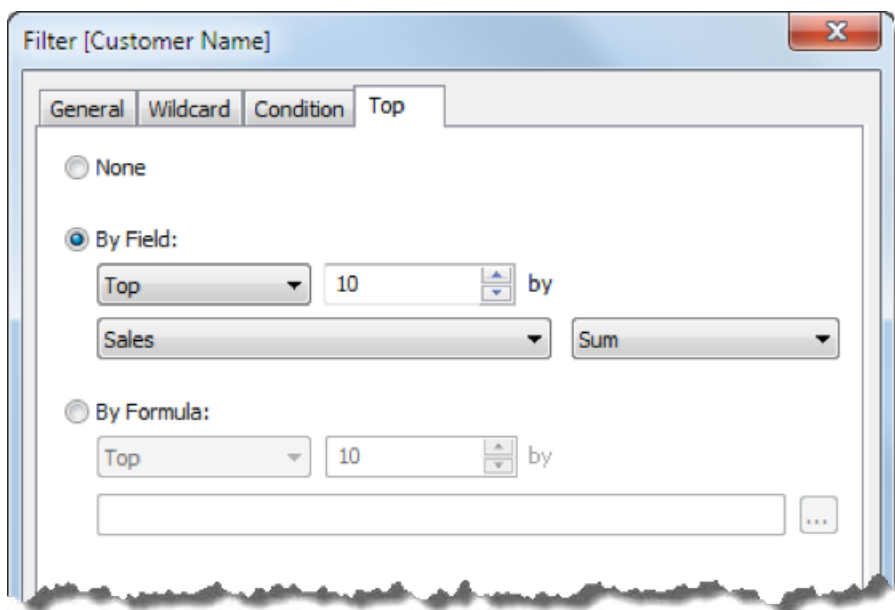
3. ANALYTICS (con't)

3.11. Filter a list to the Top 10.

3. ANALYTICS (con't)

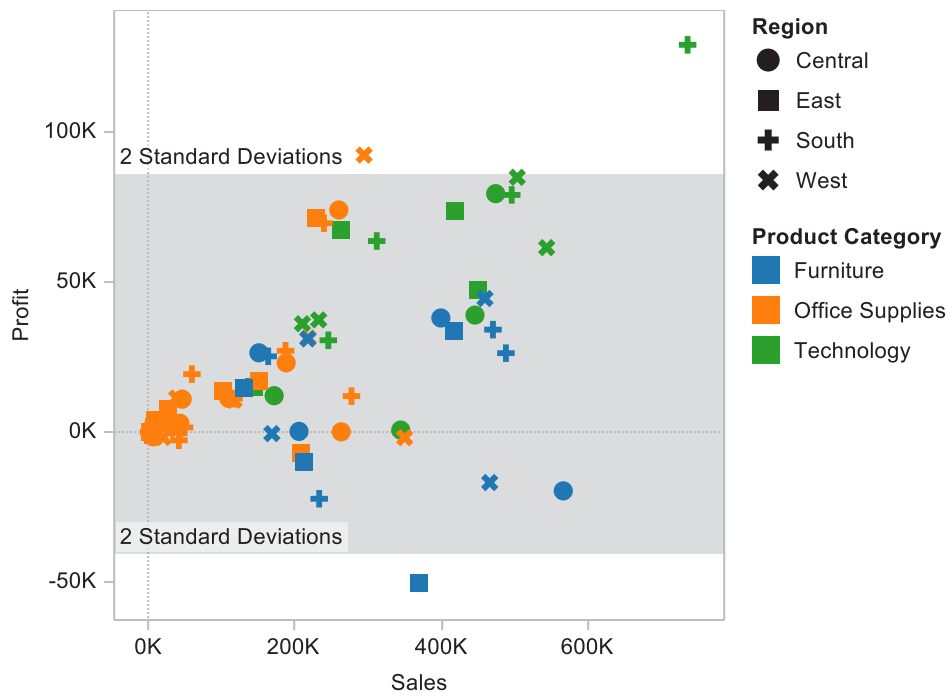3.12. Perform a linear regression (Turn on Trend Lines).

3.13. Create an extract of your data. Be able to explain what an extract is and when you would use one.

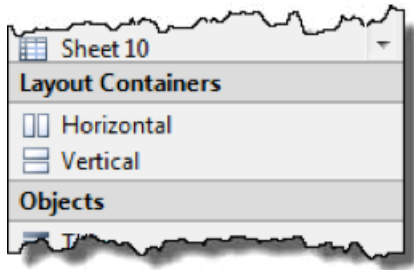3.14. Create a reference line with a constant value.

3. ANALYTICS (con't)

3.15. Create a reference line shading the area between +-2 standard deviations.

4. DASHBOARDS

4.1.   Add quick filters to dashboards.

4.2.   Organize dashboards by moving items.

4.3.   Use Horizontal and Vertical Layout Containers.

4.4.   Use 'actions' to make a selection on one sheet filter only one other sheet on the dashboard.

4.5.   Use 'actions' to highlight related items on a dashboard.