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**Purpose:** Provide training resources for web-based self-paced Tableau training for the campus community.

## User Requirements:

- a. **Viewer, Explore, and Project Leader Group:** All interactions/modification are performed within Tableau Server platform.
- b. **Creator Group:** Tableau Desktop application is required. You can download a [free 14-day trial of Tableau Desktop](#) to try it.

## User Group Type Definitions:

- a. **Viewer** – Is a user group that interacts with a published/delivered content on Tableau Server. This group can not make any changes to the content. No Tableau Desktop nor Tableau Prep application is needed; all interactions is done within Tableau Server platform.
- b. **Explorer** – Is a user group that interacts and modifies published/delivered content on Tableau Server. This group can create a new content using existing published data sources. No Tableau Desktop nor Tableau Prep application is needed; all interactions/modification is done within Tableau Server platform.
- c. **Creator** – Users in this group create/modify content for the end-users consumption (e.g. Viewer, Explorer, etc.). Creator user group can create and modify. For this user group Tableau Desktop is required.

1. *Publishing data sources*
  2. *Dashboards*
  3. *Stories*
  4. *Assign project leader to sub-project(s) (nested directory)*
  5. *Workbooks*
  6. *Add/remove content*
  7. *Grant Permissions on created content*
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d. **Project Leader** – Users in this group are responsible for security of assigned Tableau Project folder(s). A project in Tableau is a directory under which all related items such as workbooks, views, database sources, and others are packaged together. This group can do the following:

1. *Granting access to a project using user-group*
  2. *Add/Remove user groups from the project*
  3. *Assign project leader to sub-project(s) (nested directory)*
  4. *Set ownership for the content*
  5. *Add/remove content*
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e. **Site Administrator** – This group has highest level of access for Tableau server site. Unrestricted access to all content at the site level. Here are some of the functions that site administrator can perform:

1. *Connect to Tableau or external data in the browser, Tableau Desktop, or Tableau Prep*
  2. *Create new data sources; build and publish content*
  3. *Assign project leader to sub-project(s) (nested directory)*
  4. *On Tableau Server, site administrators manage users and assign site roles and site membership*
  5. *Creates Tableau Projects and delegates security on the projects to Project Leaders*
  6. *Add/remove content*
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## Training Material [Recommended]: Tableau Free Online Training

### Tableau Viewer and Explorer Training Resource

Are you consuming analytics on Tableau Server or Tableau Online? If you're looking to make data-driven decisions based on your organization's analytics, these videos are for you. Learn how to interact with content right from your browser.

If you can access published data sources and create or modify content, these videos are for you. Learn how to work with your data on the web.

Read more at <https://www.tableau.com/learn/training#Us8lOjVX1RozwBpA.99>

Viewer	Explorer
<b>Tableau.com</b>	<b>Tableau.com</b>
<b><u>Viewer Training Videos</u></b>	<b><u>Explorer Training Videos</u></b>
<a href="#">Getting Started with Tableau Server</a>	<a href="#">Getting Started with Tableau Server</a>
<a href="#">Interacting with Content on Tableau Server(Viewer)</a>	<a href="#">Interacting with Content on Tableau Server</a>
<a href="#">Navigating the Tableau Mobile App</a>	Web Authoring
<a href="#">Interacting with Content - Mobile App</a>	<a href="#">Data Driven Alerts</a>
<a href="#">Tableau on the Phone</a>	<a href="#">Navigating the Tableau Mobile App</a>
	<a href="#">Interaction with Content - Mobile App</a>
	<a href="#">Tableau on the Phone</a>
<b>Duration (0h 19m)</b>	<b>Duration (0h 27m)</b>

## Tableau Content Creator Training Resource

Are you doing deep data prep and analysis? Responsible for creating content for others? If you have Tableau Prep and Tableau Desktop, these videos are for you. Learn how to prepare, analyze, and share your data.

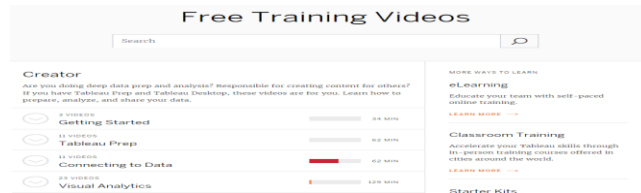


Figure 1: To see progress of your training please go to <https://www.tableau.com/learn/training>

<b><u>Creator (Content Creator Video )</u></b>	<b><u>Session(s) URL – Click links below</u></b> <b>Note:</b> To check progress of your training please go to <a href="https://www.tableau.com/learn/training">https://www.tableau.com/learn/training</a>
<b>Getting Started</b>	<ol style="list-style-type: none"> <li>1. <a href="#">Getting Started</a></li> <li>2. <a href="#">The Tableau Interface</a></li> <li>3. <a href="#">Distributing and Publishing</a></li> </ol>
<b>Connecting to Data</b>	<ol style="list-style-type: none"> <li>1. <a href="#">Getting Started with Data</a></li> <li>2. <a href="#">Managing Extracts</a></li> <li>3. <a href="#">Saving and Publishing Data Sources</a></li> <li>4. <a href="#">Data Prep with Text and Excel Files</a></li> <li>5. <a href="#">Join Types with Union</a></li> <li>6. <a href="#">Cross-database Joins</a></li> <li>7. <a href="#">Data Blending</a></li> <li>8. <a href="#">Additional Data Blending Topics</a></li> <li>9. <a href="#">Connecting to Cubes</a></li> </ol>
<b>Visual Analytics</b>	<ol style="list-style-type: none"> <li>1. <a href="#">Getting Started with Visual Analytics</a></li> <li>2. <a href="#">Drill Down and Hierarchies</a></li> </ol>

	<ol style="list-style-type: none"> <li>3. <a href="#">Sorting</a></li> <li>4. <a href="#">Grouping</a></li> <li>5. <a href="#">Additional Ways to Group</a></li> <li>6. <a href="#">Creating Sets</a></li> <li>7. <a href="#">Working with Sets</a></li> <li>8. <a href="#">Set Actions</a></li> <li>9. <a href="#">Ways to Filter</a></li> <li>10. <a href="#">Using the Filter Shelf</a></li> <li>11. <a href="#">Interactive Filters</a></li> <li>12. <a href="#">Where Tableau Filters</a></li> <li>13. <a href="#">Additional Filtering Topics</a></li> <li>14. <a href="#">Parameters</a></li> <li>15. <a href="#">Formatting</a></li> <li>16. <a href="#">The Formatting Pane</a></li> <li>17. <a href="#">Basic Tooltips</a></li> <li>18. <a href="#">Viz in Tooltip</a></li> <li>19. <a href="#">Trend Lines</a></li> <li>20. <a href="#">Reference Lines</a></li> <li>21. <a href="#">Forecasting</a></li> <li>22. <a href="#">Clustering</a></li> <li>23. <a href="#">Analysis with Cubes and MDX</a></li> </ol>
<p><b>Dashboards and Stories</b></p>	<ol style="list-style-type: none"> <li>1. <a href="#">Getting Started with Dashboards and Stories</a></li> <li>2. <a href="#">Building a Dashboard</a></li> <li>3. <a href="#">Dashboard Objects</a></li> <li>4. <a href="#">Dashboard Formatting</a></li> <li>5. <a href="#">Dashboard Interactivity Using Actions</a></li> <li>6. <a href="#">Dashboard Extensions</a></li> <li>7. <a href="#">Device Designer</a></li> <li>8. <a href="#">Story Points</a></li> </ol>
<p><b>Calculations</b></p>	<ol style="list-style-type: none"> <li>1. <a href="#">Getting Started with Calculations</a></li> </ol>

# Tableau Training

Eastern Washington University - Tableau Project Team

	<ol style="list-style-type: none"><li>2. Calculation Syntax</li><li>3. Introduction to LOD Expressions</li><li>4. Intro to Table Calculations</li><li>5. Modifying Table Calculations</li><li>6. Aggregate Calculations</li><li>7. Date Calculations</li><li>8. Logic Calculations</li><li>9. String Calculations</li><li>10. Number Calculations</li><li>11. Type Calculations</li><li>12. Conceptual Topics with LOD Expressions</li><li>13. Aggregation and Replication with LOD Expressions</li><li>14. Nested LOD Expressions</li><li>15. How to Integrate R and Tableau</li><li>16. Using R within Tableau</li></ol>
<b>Publish to Tableau Server</b>	<ol style="list-style-type: none"><li>1. Publishing to Tableau Server</li><li>2. Device Designer</li><li>3. Introduction to the Tableau JavaScript API</li></ol>
<b>Duration (5h 45m)</b>	

## OPTIONAL Training Material: Lynda.com

The following are **OPTIONAL** Tableau training material:

### [Lynda.com](https://www.lynda.com)

<https://www.lynda.com/search?q=tableau>

<u>Tableau 10: Essential Training</u>	<u>Tableau 10: Mastering Calculations</u>	<u>Creating Interactive Dashboards in Tableau 10</u>	<u>Tableau 10 for Data Scientists</u>
<i>up to version 10.2</i>	<i>up to version 10.2</i>	<i>up to version 10.1</i>	<i>up to version 10.2</i>
Introducing Tableau	Introducing Calculations in Tableau 10	Tableau Dashboards	Green and Blue Pills
Managing Data Sources and Visualizations	Summarizing Data Using Aggregate Functions	Worksheet Design	Connect and Extract Data
Managing Tableau Worksheets and Workbooks	Calculating Values Using Number Functions	Dashboard Design	Transform Data
Creating Custom Calculations and Fields	Working with Times and Dates	Designing Interactivity	Analytics
Analyzing Data Using Statistical Tools	Creating Conditional Calculations Using Logical Functions	Keeping Your Dashboard Up to Date	Map Your Data
Sorting and Filtering Tableau Data	Creating Level of Detail (LOD) Expressions		Parameters
Defining Groups and Sets	Summarizing Data Using Table Calculations		Dashboard Design
Creating and Pivoting Crosstabs	Managing Text Strings		Useful Calculations
Formatting Tableau Visualizations			
Creating Basic Charts			
Annotating and Formatting Charts			
Mapping Geographic Data			
Creating Dashboards and Actions			
What's New in Tableau 10.1 and 10.2			