

# Tableau Desktop Specialist Study Guide

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The Tableau Specialist exam format changed in mid-2021. The exam is now administered by [Pearson](#), and features 45 multiple-response and multiple-choice questions. The [current exam](#) does not feature any hands-on questions, and you cannot use Tableau Desktop or any other outside resources during the exam. [Free Specialist practice questions are available here.](#)

## Domain 1: Connecting to & Preparing Data

### 1.1 Create live connections and extracts

1.1.1 [Create a live connection to a data source](#) - *live connection is the default when you connect to a data source*

1.1.2 Explain the differences between using [live connections](#) versus [extracts](#)

1.1.3 [Create an extract](#)

1.1.4 [Save metadata properties in a .TDS](#)

1.1.5 Create a data source that uses multiple connections - [difference between a "data source" and a "connection"](#)

### 1.2 Create and manage the data model

1.2.1 [Add relationships to a data source](#)

1.2.2 Add [joins](#) and [unions](#)

1.2.3 [Explain when to use a join versus a relationship](#) - [relationships are recommended except under conditions mentioned here](#)

### 1.3 Manage data properties

1.3.1 Rename a data field

1.3.2 [Assign an alias to a data value](#)

1.3.3 [Assign a geographic role to a data field](#)

1.3.4 [Change data type for a data field \(number, date, string, Boolean, etc.\)](#)

1.3.5 [Change default properties for a data field \(number format, aggregation, color, date format, etc.\)](#)

## Domain 2: Exploring & Analyzing Data

### 2.1 Create basic charts

2.1.1 [Create a bar chart](#)

2.1.2 [Create a line chart](#)

2.1.3 [Create a scatterplot](#)

2.1.4 [Create a map using geographic data](#)

- 2.1.5 [Create a combined axis chart](#) - *blended axis is another term for combined axes*
- 2.1.6 [Create a dual axis chart](#)
- 2.1.7 Create a stacked bar
- 2.1.8 [Create a density map](#)
- 2.1.9 Create a chart to show specific values ([crosstab](#), [highlight table](#))

## 2.2 Organize data and apply filters

- 2.2.1 Create groups by using [marks](#), headers, and the [data pane](#)
- 2.2.2 Create sets by using [marks](#) and the [data pane](#)
- 2.2.3 [Organize dimensions into a hierarchy](#)
- 2.2.4 [Add a filter to a view](#)
- 2.2.5 [Add a date filter](#) - see also [this on relative date filters](#)

## 2.3 Apply analytics to a worksheet

- 2.3.1 Add a [manual](#) or a [computed sort](#) - *note that the sort is computed unless the document explicitly mentions a manual sort*
- 2.3.2 [Add a reference line](#)
- 2.3.3 [Use a quick table calculation](#)
- 2.3.4 Use [bins](#) and [histograms](#)
- 2.3.5 [Create a calculated field](#) (e.g. [string](#), [date](#), [simple arithmetic](#))
- 2.3.6 Explain when to use a parameter - [in a calculation](#), [in a filter](#), [in a reference line](#), [swamp measures](#)
- 2.3.7 [Display totals on a worksheet](#)

# Domain 3: Sharing Insights

## 3.1 Format view for presentation

- 3.1.1 [Use color from the marks card](#)
- 3.1.2 [Configure fonts](#)
- 3.1.3 [Format marks as shapes](#)
- 3.1.4 [Configure viz animations](#)
- 3.1.5 [Change size of marks](#)
- 3.1.6 [Show and hide legends](#)

## 3.2 Create and modify a dashboard

- 3.2.1 [Add worksheets to a dashboard](#)
- 3.2.2 [Add interactive elements](#) for consumers (e.g. [show filters](#), [data highlighter](#), tooltips)
- 3.2.3 Add dashboard actions (e.g. [filter action](#), [highlight action](#), [parameter control](#), [URL action](#))
- 3.2.4 Configure a [dashboard layout](#) and create [device-specific dashboards](#)
- 3.2.5 [Create a story and a story point](#)

### **3.3 View and share workbook data**

3.3.1 Share a workbook (e.g. [twbx](#) as a [PDF](#) or an [image](#), [publish to Tableau Server](#))

3.3.2 [View](#) and [export underlying data](#)

3.3.3 [Export to Microsoft PowerPoint](#)

## **Domain 4: Understanding Tableau Concepts**

### **4.1 Understand dimensions and measures**

4.1.1 [Explain what kind of information dimensions usually contain](#)

4.1.2 [Explain what kind of information measures usually contain](#)

4.1.3 [Explain the difference between dimensions and measures](#)

### **4.2 Understand discrete and continuous fields**

4.2.1 [Explain how discrete fields are displayed](#)

4.2.2 [Explain how continuous fields are displayed](#)

4.2.3 Explain the difference between discrete date parts and [continuous date values](#)

### **4.3 Understand aggregations**

4.3.1 [Explain the default aggregation for measures](#)

4.3.2 [Describe how an aggregated measure changes when dimensions are added to a view](#)