



Skills Assessment Survey

To set up an effective Data Doctor program, you'll need to first assess your employees' Tableau skills. You can create a simple Google Form to identify power users, see their credentials, find any gaps to train on, and determine which questions they are most qualified to help others with. Here's [an example survey](#) to get you started.

Refer to the **Data Doctor Skills assessment survey responses** sample spreadsheet and **Data Doctor Skills assessment** workbook to jumpstart your analysis of the survey results.

Feel free to modify these templates to best suit your needs. For more information on implementing Data Doctor in your organization, refer to [the full toolkit](#).

Preparing the data

To work with the data associated with the **Data Doctor Skills assessment survey responses** sample spreadsheet, we recommend following the below steps before replicating the dashboards:

1. Group fields into different folders, for example: Certification & Training, Primary Fields, Topics
2. Rename the "Topic Proficiency [<Skill>]" fields. For example: rename "Topic Proficiency [Covid19 Performance (Online & Server)]" as "Covid19 Performance (Online & Server)".
3. Multi-select and right click all renamed Topics fields and select **Transform > Pivot**
4. Rename "Pivot Field Name" as "Skills" and rename "Pivot Field Values" as "Skills Values"
5. (Optional) [Group](#) skills by product names (for example: Tableau Prep, Tableau Desktop, Tableau Online etc.)
6. Create a new calculate field named "Expertise Value" to convert the Values into actual whole numbers:

```
INT(IF [Skills Values] = "1/5 No Experience" THEN "1"  
ELSEIF [Skills Values] = "2/5 Beginner" THEN "2"  
ELSEIF [Skills Values] = "3/5 Intermediate" THEN "3"  
ELSEIF [Skills Values] = "4/5 Advanced" THEN "4"  
ELSEIF [Skills Values] = "5/5 Jedi/Expert" THEN "5"  
END)
```

Note: the newly created calculated field will be mainly used with **AVG ()** and **MAX ()** aggregations.

If using Tableau Prep, see [Clean and Shape Data](#) and [Pivot Your Data](#) in Tableau Help for more information about data preparation and pivots. For example, rename and pivot Product Levels of confidence, or, custom split Trainings that are separated by a coma [.,].

Additional Skills (Advanced)

In this document you will find a definition for each topic/skill/feature/functionality that could be used for an advanced assessment.



Tableau Desktop & Analytics Skills

Topic / Skill	Description
Actions, Filters, Parameters, & Sorting	Using actions, filters, or building/using parameters to control interactivity & refine data; resolving sorting issues, especially nested sorting.
Calculations & Statistics	Creating calculated fields, table calculations, or performing statistical analysis using Tableau features; explaining Tableau's calculation order of operations or statistical functionality.
Dashboard Design & Visualization Best Practices	Formatting, building specific visualization, constructing dashboards, creating stories, and displaying data for best visual impact of comprehension.
Data Connectivity	Connecting to data, including joins and data blending; explaining differences & limitations between flat, relational, cube, and cloud data sources; explaining data or calculation issues caused by the data source (data duplication, refresh rate, sampling, etc.)
Data Preparation	Manipulating data outside of Tableau for better reporting in Tableau; using Tableau Prep; how to normalize data / what normalized data is; promoting data preparation & ETL best practices.
Dates & Times	Combining date & time fields, using dates & times in calculations, comparing data between time ranges, adjusting time zones, etc.
Device Specific Design	Designing dashboards & views for optimal display on different devices (laptop, desktop, mobile phone, tablets, etc.)
Enterprise Deployments	Deploying Tableau Desktop at scale into enterprise environments, including virtualization platforms and/or centrally managing licensing with on-premises licensing.
ETL (Extract, Transform, Load)	Utilizing ETL tools & methodologies to prepare data for Tableau; using/troubleshooting Alteryx workflows; promoting general ETL best practices.
Installation & Upgrade	Installing & upgrading Tableau Desktop.
Level of Detail Calculations	Writing LOD calculations; explaining when & how to use LOD calculations; explaining how LOD calculations impact performance; transitioning nested table calculations to LOD.
Licensing	Explaining or troubleshooting activation, registration, or license transfer.
Mapping & Geocoding	Visualizing geographic data; expanding Tableau's data map in order to visualize non-standard geographic data; utilizing WMS servers. Example: creating dual axis maps; mapping address level data.
Printing & Exporting	Troubleshooting printing, exporting, or visual discrepancies between print & screen.
Tableau Prep	Explaining/demonstrating how to navigate the Tableau Prep interface, connect to data, use data cleaning functions, exporting data for use in Tableau.
R Statistical Analysis	Connecting to RServe; leveraging R statistical analysis functions & data in Tableau.



Security & Authentication	Workbook and/or data security in Tableau Desktop including row-level security, user filters, & SSL data source connections.
Survey Data	Preparing survey data for analysis in Tableau; analyzing survey data in Tableau; best practices for survey data presentation.
Technical Specifications	Explaining how hardware & system requirements impact installation, upgrade, performance.
User Interface	Explaining/demonstrating how to navigate the Tableau Desktop user interface; showing which features/functionality has changed or moved between versions.
Workbook Performance & Optimization	Optimizing workbook performance issues; promoting workbook best practices.

Tableau Server Skills

Topic / Skill	Description
Authentication - Basic	Configuring and/or troubleshooting Local, Active Directory, SSPI, SSL/TLS, Trusted Authentication, Mutual Authentication (Client certs). Example: How to transition from one authentication method to another; how to configure authentication for more than one domain.
Authentication & Delegation – Kerberos	Configuring and/or troubleshooting Kerberos authentication or delegation.
Authentication – LDAP	Configuring and/or troubleshooting LDAP authentication.
Authentication – SAML & OpenID	Configuring and/or troubleshooting SAML, Federated Identity, or OAuth authentication.
Configuration & Command Line Operation	Using tabcmd, tabadmin, or other command line tools to configure & operate Tableau Server.
Content Management	Managing users, groups, projects, and data sources / extracts, including extract refresh & schedules.
Data Connectivity	Accessing / connecting to data via Tableau Server to facilitate live data or extract refresh; explaining driver installation requirements for Tableau Server.
Extracts	Publishing, modifying, and refreshing extracts.
Installation, Upgrade, Backup, & Restore	Installing, upgrading, or performing backups on restores; working with distributed environments; installation/upgrade/backup requirements; backup/disaster recovery/redundancy planning & best practices.
Licensing	Explaining or troubleshooting activation, registration, or license transfer. Especially for distributed environments (workers).
Linux	Installing, activating, operating, or performing backups or restores of Tableau Server on Linux.
Load Balancers & Proxy Servers	Configuring/using/troubleshooting Tableau Server in an environment that utilizes load balances or proxy servers.



Mapping & WMS Servers	Troubleshooting issues with map views after publishing to Tableau Server; configuring Tableau Sever to access WMS Server data.
Publishing & Exporting	Explaining/demonstrating/troubleshooting publishing workbooks & data sources or exporting workbooks & data from Tableau Server.
Security (Permissions)	Managing or configuring access to content on Tableau Sever including groups, projects, workbooks, & data sources; promoting permissions best practices.
Sharing & Subscriptions	Explaining/demonstrating/troubleshooting sharing or subscribing to workbooks & views.
Sizing, Scaling, & Performance Optimization	Optimizing performance of workbooks & views on Tableau Server vs. Tableau Desktop; troubleshooting high CPU or memory usage issues; recommending/reviewing sizing or scaling of Tableau Server for a particular use case.
Technical Specifications	Explaining how hardware & system requirements impact installation, upgrade, performance.
User Interface	Explaining/demonstrating how to navigate the Tableau Server user interface; showing which features/functionality has changed or moved between versions.
View Rendering	Explaining how views are rendered; troubleshooting errors generated while view renders, when view is embedded, or when views are rendered incorrectly.
Web Authoring	Explaining/demonstrating how to create/modify views via a web browser.

Tableau Online Skills

Topic / Skill	Description
Authentication - Basic	Logging into Tableau Online; creating new users.
Authentication – SAML & OpenID	Configuring and/or troubleshooting SAML, Federated Identity, or OAuth authentication.
Configuration & Command Line Operation	Using tabcmd or other command line tools to automate content publication or refresh to Tableau Online.
Content Management	Managing users, groups, projects, and data sources / extracts, including extract refresh & schedules.
Data Connectivity	Accessing / connecting to data via Tableau Online to facilitate live data or extract refresh; utilizing and/or troubleshooting Dashboard Starters.
Extracts	Publishing, modifying, and refreshing extracts.
Mapping & WMS Servers	Troubleshooting issues with map views after publishing to Tableau Online; utilizing WMS Server data.
Performance Optimization	Optimizing performance of workbooks & views on Tableau Online vs. Tableau Desktop.



Publishing & Exporting	Explaining/demonstrating/troubleshooting publishing workbooks & data sources or exporting workbooks & data from Tableau Online.
Security (Permissions)	Managing or configuring access to content on Tableau Online including groups, projects, workbooks, & data sources; promoting permissions best practices.
Sharing & Subscriptions	Explaining/demonstrating/troubleshooting sharing or subscribing to workbooks & views.
Tableau Bridge	Explaining/demonstrating/troubleshooting refreshing data on Tableau Online with Tableau Bridge.
User Interface	Explaining/demonstrating how to navigate the Tableau Online user interface; showing which features/functionality has changed or moved between versions.
View Rendering	Explaining how views are rendered; troubleshooting errors generated while view renders, when view is embedded, or when views are rendered incorrectly.
Web Authoring	Explaining/demonstrating how to create/modify views via a web browser.

Tableau APIs & Developer Tools Skills

Topic / Skill	Description
Data Extract API	Using/troubleshooting the Data Extract API to create or refresh data extracts.
Document API	Using/troubleshooting the Document API to modify workbooks.
Extensions API	Using/troubleshooting the Extensions API
JavaScript API	Using/troubleshooting the JavaScript API to extend Tableau Server / Tableau Online functionality.
ODBC Connection (TDC)	Creating/troubleshooting TDC file to tune generic ODBC data connections; explaining limitations of generic ODBC data connections.
REST API	Using/troubleshooting the REST API to report on Tableau Server operation.
Tableau Developer & IT Admin Tools	Using/troubleshooting tabmon, tabjolt, tabmigrate, VizAlerts, logshark, Data Driven Alerts, sparkler, etc.
Web Data Connector (WDC)	Creating/troubleshooting a custom web data connector to connect to online data.

Tableau Mobile Skills

Topic / Skill	Description
Authentication	Configuring/troubleshooting authentication issues between mobile devices & Tableau Server / Tableau Online, especially via SSL.
Device Management	Deploying Tableau Mobile App using Mobile Device Management software.



View Rendering

Troubleshooting issues where the Tableau Mobile App is not rendering dashboards or views as expected.
