



Introduction to Tableau Basics / Tableau Quick Start

Get Started with Tableau Basics to Create Effective Visualizations and Dashboards

www.triveratech.com

Course Snapshot

- **Course:** TTDTAB001: Introduction to Tableau Basics / Tableau Quick Start
- **Duration:** 1 day
- **Audience:** New Tableau Users, or users new to tableau that want details on the basics and key features. Individuals working with data-regardless of technical or analytical background are a fit for this course.
- **Hands-on Learning:** This lab-intensive, hands-on course combines engaging expert lessons, demos and group discussions with real-world, skills-focused machine-based labs and exercises. Student machines are required.
- **Delivery Options:** This course is available for **onsite private classroom presentation, live online virtual presentation**, or can be presented in a **blended learning format**. Please also ask about our **Self-Paced / Video / QuickSkills** or **Mini-Camp / Short Course** flexible delivery options.
- **Public Schedule:** This course has active dates on our live-online open enrollment **Public Schedule**.
- **Customizable:** This course agenda, topics and labs can be further adjusted to target your specific training skills objectives, tools and learning goals. Please ask for details.

Overview

Introduction to Tableau Basics / Tableau Quickstart is a one day course designed to familiarize you with Tableau's most popular functions while providing with hands-on practice with a few key essential skills you'll need to create basic reports and data visualizations. Working in an engaging learning environment led by our expert Tableau practitioner, you'll learn how to simplify, sort, organize and modify your data or data sources, and then how to move from creating simple to a variety of complex visualizations, exploring a wide-variety of commonly used visualization types. You'll also learn how to combine your visualizations into interactive dashboards and publish them to the web, or share them with others.

You'll exit this course armed with a good understanding of features and benefits of using Tableau, able to organize simple data sets and create a few basic visualizations using a few common types. If you want a deeper dive look at Tableau or more extensive hands-on, please see our Tableau Training Suite for options and learning paths to guide you deeper into your hands-on data journey.

NOTE: The Tableau Training Series is independent-format training that can be tuned and adjusted to best meet your needs. Our materials are flexible, comprehensive, and are always instructed by a senior instructor with a deep understanding of Tableau and its most current features, benefits and functionality in a wide array of uses. This is not Official Tableau Training.

Learning Objectives

Working in a light hands-on learning environment led by our expert facilitator, students will learn how to:

- Understand Tableau terminology
- Use the Tableau interface / paradigm to effectively create powerful visualizations
- Simplify, sort and organize your data
- Create basic calculations including string manipulation, basic arithmetic calculations, custom aggregations and ratios, date math, logic statements and quick table calculations
- Use groups, bins, hierarchies, sorts, sets, and filters to create focused and effective visualizations
- Use Measure Name and Measure Value fields to create visualizations with multiple measures and dimensions.
- Analyzing Data with Quick Table Calculations
- Handle changes in your data source such as field addition, deletion or name changes.
- Share your visualizations with others.
- Combine your visualizations into Interactive Dashboards and publish them to the web.
- Represent your data using the following visualization types including:
 - Cross tabs; Heat maps; Distribution charts; Tree maps; Pie charts and bar charts; Dual axis and combo charts with different mark types; Box plots; Highlight tables; Scatter plots

Need different skills or topics? If your team requires different topics or tools, additional skills or custom approach, this course may be further adjusted to accommodate. We offer additional Tableau, reporting, data analytics, visualization and other related topics that may be blended with this course for a track that best suits your needs.

Audience & Pre-Requisites

This is an **introductory-level** Tableau course geared for attendees new to using the tool, or for those who want a refresher of the basics or newer features. Ideal attendees would be beginner Tableau users who want to quickly get up to speed with intermediate level Tableau features and functions. Individuals working with data-regardless of technical or analytical background are a fit for this course. Attendees should have familiarity with using Microsoft Excel.

Take Next: We offer a wide array of 'next-step' Tableau courses for various skill levels and roles. Please see our detailed **Tableau Training Suite** list of offerings for the complete Tableau, reporting and analytics course list, skills map and suggested learning paths.

Enhanced Learning Services: Please also ask about our **Pre-Training Class OnRamp & Prep / Primer** offerings, **Skills Gap Assessment Services, Case Studies, Knowledge Check Quizzes, Skills Immersion Programs & Camps, Collaborative Mentoring Services** and **Extended Learning Support & Post Training** services.

Course Topics / Agenda

Please note that this list of topics is based on our standard course offering, evolved from typical industry uses and trends. We'll work with you to tune this course and level of coverage to target the skills you need most. Topics, agenda and labs are subject to change, and may adjust during live delivery based on audience interests, skill-level and participation.

- 1. Simplifying and Sorting Your Data**
 - Data Filtering
 - Creating Date Filters
 - Sorting
- 2. Organizing Your Data**
 - Using Groups
 - Creating and Using Hierarchies
- 3. Slicing Your Data by Date**
 - Working with Dates in Tableau
 - Using Discrete Date Parts
 - Defining a Fiscal Year
 - Creating Custom Dates
- 4. Using Multiple Measures in a View**
 - Using Measure Values and Measure Names in a View
- 5. Showing the Relationship between Numerical Values**
 - Creating Scatter Plots
 - Using Sets
- 6. Viewing Specific Values**
 - Creating Heat Maps
 - Creating Crosstabs
 - Creating Highlight Tables
 - Grand Totals, Sub-Totals, and Changing Aggregation
- 7. Customizing Your Data**
 - Calculation Types
 - Parts of a Calculated Field
 - Options for Creating Calculated Fields
- 8. Analyzing Data with Quick Table Calculations**
 - Using Quick Table Calculations
- 9. Showing Breakdowns of the Whole**
 - Pie Charts and Parts of the Whole
 - Creating Tree Maps
- 10. Viewing Distributions**
 - Bins and Histograms
 - Box and Whisker Plots
- 11. Making Your Views Available**
 - Building Dashboards
 - Dashboard Actions
- Combo Charts**
- Combined or Shared Axis Charts**
- Creating Dual Axis Charts**
- Strings, Dates, and Type Conversion Functions**
- Calculations and Aggregations**

Lab Setup Made Simple. All course materials, data sets, Tableau course software (limited version, for course use only), course notes and related resources (as applicable) are provided for attendees in our easy access, no installation required, remote lab environment for the duration of the course. Our tech team will help set up, test and verify lab access for each attendee prior to the course start date, ensuring a smooth start to class and successful hands-on course experience for all participants.

For More Information

All courses can be presented **onsite** or **online**, or in a **combined / flex / blended learning format**, tailored to target your specific audience, needs and learning goals. We also offer focused, flexible **short courses, self-paced learning options, recorded sessions**

and more. We train beginner to advanced skills in all areas we cover, and offer **New Hire / Cohort Training, Boot Camps, Skills Immersion Programs, Reskilling Programs, Skills Migration & Transition Programs**, and more. We collaborate with you to ensure all courses are truly targeted to meet your specific needs and learning skills, maximizing your valuable training time, as well as your important budget.

Please also visit our extensive **Public Training Schedule** for training for smaller groups or individuals. Please contact us for course details, **Corporate Rates** and **Special Discount Offers**.

For more information about our dedicated training services, collaborative coaching services, courseware licensing options, public course schedule, training management services, partner programs, or to see our complete list of course offerings and special offers please visit us at www.triveratech.com, email Info@triveratech.com or call us toll free at **844-475-4559**. Our pricing and services are always satisfaction guaranteed.

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