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Collaborative IT Training, Coaching & Skills Development Solutions

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Tableau Jump Start / Hands-on Introduction to Tableau for New Users
Hands-on Tableau Essentials to Create Effective Visualizations and Dashboards

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Course Snapshot

- **Course: TTDTAB002: Tableau Jump Start / Hands-on Introduction Tableau for New Users**
- **Duration:** 2 days
- **Audience:** New Tableau Users, or users new to tableau that want more 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

Tableau JumpStart / Hands-on Introduction to Tableau for New Users is a two-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 explore how to do trend analysis and forecasting using clustering and distribution models to inform your analytics, and then how to combine your visualizations into interactive dashboards and share them with others.

Great visualizations based on accurate data can provide the insights an organization needs to make better informed decisions. 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.

This course is a superset of the one-day Tableau QuickStart. The topics covered are similar, however the JumpStart class dives deeper into the hands-on portion of the training and extends some of the more advanced concepts.

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

This skills-focused course combines expert lecture, real-world demonstrations and group discussions with machine-based practical labs and exercises. Working in a hands-on learning environment led by our expert facilitator, students will learn how to:
- Create stylish visualizations and dashboards that explain complexity with clarity
- Learn effective data storytelling to transform how your business uses ideas and makes decisions
- Explore the latest features in Tableau and start to redefine what business analytics means to your organization
- Find out how to build effective visualizations and dashboards
- Prepare and clean your data so you can be sure Tableau is finding answers to your questions – not raising more problems
- Discover how to create advanced visualizations that explain complexity with clarity and style
- Dig deeper into your data with clustering and distribution models that allow you to analyze trends and make forecasts
- Learn how to use data storytelling to aid decision-making and strategy
- Share dashboards and visualizations to cultivate a culture where data is available and valued

**Tableau
Training Series**

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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. It will help you understand and use the basic techniques for creating visualizations and combining them in interactive dashboards.

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: Creating Your First Visualizations and Dashboard
- Connecting to data
- Foundations for building visualizations
- Visualizing data
- Creating bar charts
- Creating line charts
- Creating geographic visualizations
- Using Show Me
- Bringing everything together in a dashboard

2: Working with Data in Tableau
- The Tableau paradigm
- Connecting to data
- Managing data source metadata
- Working with extracts instead of live connections
- Tableau file types
- Joins and blends
- Filtering data

3: Moving from Foundational to More Advanced Visualizations
- Comparing values across different dimensions
- Visualizing dates and times

- Relating parts of the data to the whole
- Visualizing distributions
- Visualizing multiple axes to compare different measures

4: Using Row-Level, Aggregate, and Level of Detail Calculations
- Creating and editing calculations
- Overview of the three main types of calculations
- Level of Detail calculations
- Parameters
- Practical examples of calculations and parameters
- Ad hoc calculations
- Performance considerations

5: Table Calculations
- Overview of table calculations
- Quick table calculations
- Relative versus fixed
- Scope and direction
- Addressing and partitioning
- Custom table calculations
- Practical examples
- Data densification

6: Formatting a Visualization to Look Great and Work Well
- Formatting considerations
- Understanding how formatting works in Tableau
- Adding value to visualizations

7: Telling a Data Story with Dashboards
- Dashboard objectives
- Example - is least profitable always unprofitable?
- Designing for different displays and devices
- How actions work
- Example - regional scorecard
- Stories

8: Deeper Analysis – Trends, Clustering, Distributions, and Forecasting
- Trending
- Clustering
- Distributions
- Forecasting

9: Making Data Work for You
- Structuring data for Tableau

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- Techniques for dealing with data structure issues
- Overview of advanced fixes for data problems

10: Advanced Visualizations, Techniques, Tips, and Tricks
- Advanced visualizations
- Sheet swapping and dynamic dashboards
- Advanced mapping techniques
- Using background images

- Animation

11: Sharing Your Data Story
- Presenting, printing, and exporting
- Sharing with users of Tableau Desktop and Tableau Reader
- Sharing with users of Tableau Server, Tableau Online, and Tableau Public
- Additional distribution options using Tableau Server

12. (OPTIONAL – Time Permitting) Overview of Tableau Server
- User interactions with Tableau Server
- Single-server installation
- Content administration
- Authorization and permissions
- Users, groups, and sites
- Data sources and extracts
- Schedules, tasks, and subscriptions
- Monitoring server status

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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