



Introduction to Creating Great Data Visualizations with Tableau Desktop (for New Users)

Explore using Tableau Desktop to Deep Dive Your Data and Create and Share Great Data Driven Insights

www.triveratech.com

Course Snapshot

- **Course:** TTDTAB004: Introduction to Creating Great Data Visualization with Tableau Desktop (for New Users)
- **Duration:** 3 days
- **Audience:** New Tableau Users working with data-regardless of technical or analytical background.
- **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

Data-backed visualizations allow anyone to explore, analyze, and report insights and trends from data. Tableau® software is designed for this purpose. Tableau was built to connect to a wide range of data sources and allows users to quickly create visualizations of connected data to gain insights, show trends, and create reports. Beyond the fundamental capabilities of creating data driven visualizations, Tableau allows users to manipulate data with calculations to show insights, make visualizations interactive, and perform statistical analysis. This gives users the ability to create and share data driven insights with peers, executives and clients.

Introduction to Creating Great Data Visualization with Tableau Desktop (for New Users) is a hands-on course designed for users new to Tableau, who handle and work with data, regardless of their technical or analytical background. This course is designed to help students gain an understanding of the key features and uses of the Tableau toolset to move from simple to complex visualizations, and then how to combine them in interactive dashboards.

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:

- Connect to your data; Edit and save a data source.
- Understand Tableau terminology.
- Use the Tableau interface / paradigm to effectively create powerful visualizations.
- Create basic calculations including string manipulation, basic arithmetic calculations, custom aggregations and ratios, date math, logic statements and quick table calculations.
- Represent your data using the following visualization types: Cross Tabs; Geographic Maps; 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
- Use Reference Lines to highlight elements of your data.
- 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.
- 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.

Course Topics Quick View: This is the high-level list of the high-level topics address by this course. Please see the detailed Course Agenda or Training Plan below.

- Tableau Fundamentals
- Connecting and Preparing Data
- Exploring Data
- Managing, Sorting and Grouping Data
- Saving and Sharing Data
- Filtering Data
- Customizing Visualizations
- Creating Maps, Dashboards and Stories
- Blending Data to Visualize Relationships
- Joining Data
- Accessing Data in PDFs
- Refining Visualizations with Sets and Parameters
- Performing Statistical Analysis and Forecasting
- Manipulating Data with Calculations
- Visualizing Data with Advanced Calculations
- Enriching Visualizations, Dashboards and Maps

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, with focus on data visualization. Individuals working with data-regardless of technical or analytical background are a fit for this course.

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. Getting to Know Tableau <ul style="list-style-type: none"> • Overview of Tableau • Navigate the Tableau Interface and Configure Settings | 5. Saving and Sharing Data <ul style="list-style-type: none"> • Save and Publish Data Sources • Share Workbooks for Collaboration | between numerical values, and viewing specific values |
| 2. Connecting to and Preparing Data <ul style="list-style-type: none"> • Connect to Data • Prepare Data for Analysis • Save Workbook Files | 6. Filtering Data <ul style="list-style-type: none"> • Configure Worksheet Filters • Apply Advanced Filter Options • Create Interactive Filters | 8. Creating Maps, Dashboards and Stories <ul style="list-style-type: none"> • Create Maps • Create Dashboards • Create Stories |
| 3. Exploring Data <ul style="list-style-type: none"> • Create a View • Customize Data in Visualizations | 7. Customizing Visualizations <ul style="list-style-type: none"> • Format and Annotate Views • Highlight Data • Create Advanced Visualizations | 9. Blending Data to Visualize Relationships <ul style="list-style-type: none"> • Blend Data • Troubleshoot and Refine Data Blends |
| 4. Managing Storing and Grouping Data <ul style="list-style-type: none"> • Adjust Fields • Sort Data • Group Data | <ul style="list-style-type: none"> • Slicing your data by date, mapping data geographically, and customizing your data • Using multiple measures in a view, showing the relationship | 10. Joining Data <ul style="list-style-type: none"> • Create Joins • Troubleshoot Joins • Union Data |

11. Accessing Data in PDFs

- Connect to PDFs
- Clean and Organize PDF Data

12. Refining Visualizations with Sets and Parameters

- Create Sets
- Analyze Data with Sets
- Apply Parameters to Data to Refine Visualizations

13. Manipulating Data with Calculations

- Create Calculated Fields

- Manipulate Data with Functions
- Analyze Data with Table Calculations
- Analyzing data with quick table calculations
- Showing breakdowns of the whole

14. Visualizing Data with Advanced Calculations

- Create Groups and Bins with Calculations
- Analyze Data with LOD Expressions

15. Performing Statistical Analysis and Forecasting

- Perform Statistical Analysis
- Forecast Data Trends
- Highlighting data with reference lines

16. Enriching Visualizations, Dashboards and Maps

- Customize Mapped Data
- Enhance Visualizations with Tooltips
- Enhance Dashboards with Actions

Hands-on 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

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.

TRIVERA TECHNOLOGIES • Collaborative IT Training, Coaching & Skills Development Solutions
www.triveratech.com • toll free +1-844-475-4559 • Info@triveratech.com • Twitter TriveraTech

ONSITE, ONLINE & BLENDED TRAINING SOLUTIONS • PUBLIC / OPEN ENROLLMENT COURSES • COURSEWARE LICENSING & DEVELOPMENT
MENTORING • ASSESSMENTS • LEARNING PLAN DEVELOPMENT • SKILLS IMMERSION PROGRAMS / RESKILLING / NEW HIRE / BOOT CAMPS
PARTNER & RESELLER PROGRAMS • CORPORATE TRAINING MANAGEMENT • VENDOR MANAGEMENT SERVICES

Trivera Technologies is a Woman-Owned Small-Business Firm

Explore Trivera's Ways to Learn!**everyCourse**
EXTRASTECHNOLOGY
MiniCamps**quickSkills**
FREE COURSES AND WEBINARS**afterCourse**
COACHING AND SUPPORT