

Tableau Desktop Fundamentals

Hands-on Tableau to Connect to Your Data, Create Basic Calculations, Create Visualizations, Reports and More

Course Snapshot

- **Course:** Tableau Desktop Fundamentals (TTDTAB006)
- **Duration:** 2 days
- **Audience / Skill Level:** This is an **introductory-level course** for Users new to Tableau who will be using Tableau on the desktop.
- **Hands-on Learning:** This course is approximately 50% hands-on lab to lecture ratio, combining 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 Desktop Fundamentals is a two-day, hands-on course designed for users new to Tableau, who handle and work with data, regardless of their technical or analytical background. Working in a hands-on learning environment, you'll learn how to use the key features of Tableau to move from simple to complex visualizations, and then how to combine them in interactive dashboards.

If you're looking to combine introductory Tableau Desktop topics with a deeper dive into Data Visualization, you might consider the three-day superset course, **JumpStart Great Data Visualization with Tableau Desktop (for New Users) (TTDTAB004)**, as an alternative.

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

- Connect to your data, and 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.

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. Please see our **Tableau Training Suite** for 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 desktop edition of 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 next-level Tableau features and functions. Individuals working with data—regardless of technical or analytical background—are a fit for this course.

Follow On / Next-Steps: 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 will work with you to tune this course and level of coverage to target the skills you need most. Course agenda, topics and labs are subject to adjust during live delivery in response to student skill level, interests and participation.

- | | | |
|---|---|---|
| <p>1. Introduction</p> <ul style="list-style-type: none"> Tableau Desktop and the Tableau Product Line Application Terminology Visual Cues for Fields Getting Started in Tableau Desktop Elements of a Visualization <p>2. Connecting to Data</p> <ul style="list-style-type: none"> Creating a Live Data Connection Saving and Editing a Data Source Metadata Grid Understanding Changes to Data Data Connection Options Sharing Options <p>3. Simplifying and Sorting Your Data</p> <ul style="list-style-type: none"> Data Filtering Creating Date Filters Sorting <p>4. Organizing your Data</p> <ul style="list-style-type: none"> Using Groups Creating and Using Hierarchies <p>5. Slicing your Data by Date</p> <ul style="list-style-type: none"> Working with Dates in Tableau Using Discrete Date Parts Defining a Fiscal Year | <ul style="list-style-type: none"> Creating Custom Dates <p>6. Using Multiple Measures in a View</p> <ul style="list-style-type: none"> Using Measure Values and Measure Names in a View Combo Charts Combined or Shared Axis Charts Creating Dual Axis Charts <p>7. Showing the Relationship between Numerical Values</p> <ul style="list-style-type: none"> Creating Scatter Plots Using Sets <p>8. Mapping Data Geographically</p> <ul style="list-style-type: none"> Mapping in Tableau Geographic Mapping Background Maps and Layers Navigation and Selection in Maps <p>9. Viewing Specific Values</p> <ul style="list-style-type: none"> Creating Heat Maps Creating Crosstabs Creating Highlight Tables Grand Totals, Sub-Totals, and Changing Aggregation <p>10. Customizing your Data</p> <ul style="list-style-type: none"> Calculation Types Parts of a Calculated Field Options for Creating Calculated | <ul style="list-style-type: none"> Fields Strings, Dates, and Type Conversion Functions Calculations and Aggregations <p>11. Analyzing Data with Quick Table Calculations</p> <ul style="list-style-type: none"> Using Quick Table Calculations <p>12. Showing Breakdowns of the Whole</p> <ul style="list-style-type: none"> Pie Charts and Parts of the Whole Creating Tree Maps <p>13. Viewing Distributions</p> <ul style="list-style-type: none"> Bins and Histograms Box and Whisker Plots <p>14. Highlighting Data with Reference Lines</p> <ul style="list-style-type: none"> Using Reference Lines Reference Bands Using the Analytics Pane Instant Analytics <p>15. Making Your Views Available</p> <ul style="list-style-type: none"> Building Dashboards Dashboard Actions |
|---|---|---|
-

Student Materials & Lab Environment

All course software (limited versions, for course use only), digital courseware files or course notes, labs / data sets and solutions (as applicable) are provided for you in our “easy access / no install required” high-speed remote lab environment. Our tech team works with every student to ensure everyone is set up with working access and ready to go prior to every course start date, ensuring a smooth delivery and great hands-on experience. Please ask for details.

Trivera Technologies | Tableau Training Suite

Tableau Essentials – New to Tableau

Strong Tableau foundation courses for all users as their experience with data analytics and Tableau builds.

- TTDTAB000 Getting to Know Tableau (Half-day workshop, light hands-on optional)
- TTDTAB001 Tableau QuickStart (1 day, light hands-on)
- TTDTAB002 Tableau JumpStart / Hands-on Introduction to Tableau for New Users / (2 days; extension of Tableau Quick Start)
- TTDTAB003 Tableau Web Authoring Essentials (2 days)
- TTDTAB004 JumpStart Great Data Visualization with Tableau Desktop (for New Users) (3 days)
- TTDTAB005 Tableau Server Administration (2 days)
- TTDTAB006 Tableau Desktop Fundamentals (2 days)
- TTDTAB102 Working with Tableau and Alteryx (Introductory) (2 days)

Next Level Tableau – Intermediate and Beyond for Experienced Users

Courses for Experienced Tableau Users. Leverage intermediate and beyond level Tableau features and best practices to advance your data analytics, visualizations and reporting skills.

- TTDTAB007 Tableau Desktop II (Intermediate Tableau Desktop) (2 days)
- TTDTAB010 Tableau Prep Building (Tableau Data Prep) for Experienced Users (2 days)
- TTDTAB015 Intermediate Tableau for Power Users (2 days)
- TTDTAB019 Tableau Data Visualization Essentials for Experienced Users (2 days)
- TTDTAB020 Next-Level Tableau Visual Analytics (Intermediate) (2 days)
- TTDTAB025 Advanced Tableau: Next Level Data Visualizations, Calculations, Hadoop Integration & More (2 days)

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.

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