

## Next Level Tableau for Power Users / Intermediate Tableau

Explore Tableau Advanced Charts, Formatting & Visualizations; Calculations, Statistics, Mappings & More

### Course Snapshot

- **Course:** Next Level Tableau for Power Users / Intermediate Tableau (TTDTAB015)
- **Duration:** 2 days
- **Audience & Skill-Level:** This is an intermediate-level course for experienced Tableau users.
- **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.

**Next Level Tableau / Intermediate Tableau for Power Users** is a two-day course that provides you with hands-on experience with the less obvious (often more advanced) tricks and tips within Tableau that can help you accelerate your day to day taskworking with Tableau. In order to gain the most from the labs, you should come to class armed with a deep understanding of all the fundamental concepts of building worksheets and dashboards. Throughout the class you'll learn how to build advanced chart types and visualizations, as well as complex calculations to manipulate your data. You'll explore working with geographical mapping and using custom images and geocoding to build spatial visualizations of non-geographic data. You'll also deep dive implementing all options in working with data. Your expert facilitator will share tons of practical experience, best practices and tips and tricks throughout the course.

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:

- Build advanced chart types and visualizations
- Build complex calculations to manipulate your data
- Work with statistics and statistical techniques
- Work with parameters and input controls
- Implement advanced geographic mapping techniques and use custom images and geocoding to build spatial visualizations of non-geographic data
- Implement all options in working with data: Joining multiple tables, data blending, performance considerations and working with the Data Engine, sharing your connections as meta data, and understand when to implement which connection method.
- Build better dashboards using techniques for guided analytics, interactive dashboard design and visual best practices
- Implement many efficiency tips and tricks
- Optional: Understand the basics of Tableau Server and other options for sharing your results

**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 **Intermediate and beyond-level** Tableau course geared for experienced Tableau users who wish to leverage Tableau’s more advanced capabilities.

**Take Before:** Attending students should have skills equivalent to or should have recently attended one of these courses:

- TTDTAB002 Introduction to Tableau / Tableau JumpStart (2 days)
- TTDTAB006 Tableau Desktop Fundamentals (2 days)
- TTDTAB004 JumpStart Great Data Visualization with Tableau Desktop (for New Users)

**Take After:** 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.*

### Introduction and Getting Started (Quick Refresh, Optional)

- Why Tableau? Why Visualization?
- The Tableau Product Line
- Level Setting – Terminology
- Getting Started – creating some powerful visualizations quickly
- Review of some Key Fundamental Concepts

### Filtering, Sorting & Grouping

- Filtering, Sorting and Grouping are fundamental concepts when working with and analyzing data.
- Advanced options for filtering and hiding
- Understanding your many options for ordering and grouping your data: Sort,
- Groups, Bins, Sets
- Understanding how these options inter-relate

### Working with Data

- Learn the difference between joining and blending data, and to do each
- Consider the implications of working with large data sets, and options for when and how to work with extracts and the data engine.

- Investigate best practices in “sharing” data sources for Tableau Server users.
- Data Types and Roles
  - Dimension versus Measures
  - Data Types
  - Discrete versus Continuous
  - The meaning of pill colors
- Database Joins
- Data Blending
- Working with the Data Engine / Extracts and scheduling extract updates
- Working with Custom SQL
- Adding to Context
- Switching to Direct Connection
- Building meta data via shared Data Source connections
- Performance considering and working with big data
- OLAP considerations (Overview)

### Working with Calculated Data and Statistics

- Understand the intricacies of manipulating data within Tableau
- A Quick Review of Basic Calculations
  - Arithmetic Calculations
  - String Manipulation
  - Date Calculations
  - Quick Table Calculations

- Custom Aggregations
- Custom Calculated Fields
  - Logic and Conditional Calculations
  - Conditional Filters
- Advanced Table Calculations
  - Understanding Scope and Direction
  - Calculate on Results of Table Calculations
  - Complex Calculations
  - Difference from Average
  - Discrete Aggregations
  - Index to Ratios
- Understanding where Calculations Occur
  - Statistics
  - Reference / Trend Lines
  - Statistical Calculations
  - Summary Stats
  - Cohort Analysis
- Working with Dates and Times
  - Continuous versus Discrete Dates
  - Dates and Times
  - Reference Dates

### Advanced Mapping

Learn the intricacies of working with the mapping function within Tableau including working with custom geographies and geo-coding, working

with an alternate WMS server and spatially visualizing non-geographic data

- Fundamentals Review: Building basic maps
  - Fixing geographies
  - Geographic Fields
  - Map Options
- Built-in Demographics / Layering
- WMS – working with a Web Map Service
- Importing Custom Geographies
- Assigning Geographies to Non-Geographic fields
- Distance Calculations
- Spatially Visualizing non-Geographic Data using background images and geo-coding

#### Working with Parameters

How to use parameters to modify our title, create What-If analysis, etc.

- Parameter Basics
  - Data types of parameters
  - Using parameters in calculated fields
  - Inputting parameter values and parameter control options
- Advanced Usage of Parameters
  - Using parameters for titles, field selections, logic

statements, Top X

#### Building Advanced Chart Types and Visualizations / Tips & Tricks

Create chart types and visualizations that may be less obvious in Tableau, as well as more common tips & tricks / techniques to assist customers in solving more complex problems.

- Bar in Bar
- Box Plot
- Bullet Chart
- Custom Shapes
- Gantt Chart
- Heat Map
- Pareto Chart
- Spark Line
- KPI Chart

#### Best Practices in Formatting and Visualizing

- Formatting Tips
  - Drag to Legend
  - Edit Legend
  - Fill 100% Black Line
  - Highlighting
  - Labeling
  - Legends
  - Working with Nulls
  - Table Options
  - Annotations and Display Options
- Introduction to Visualization Best

Practices

#### Building Better Dashboards

How to build effective and interactive applications via dashboarding.

- Interactive Dashboards
  - Quick Filters
  - Dashboard Objects
  - Filter Actions
  - Highlighting and Actions
  - Performance
  - Publish to Web
  - Zones
- Guided Analytics
  - Cascading Filters
  - Highlighting
  - Quick filter Options
  - Select then See Visual
  - Self-Populating Dashboards
  - Shortcuts
  - URL Actions

#### Overview – Working with Tableau Server

- Publishing to Tableau Server – Overview of publishing, scheduling & security options
- Tableau Server Usage – Interacting with Published Visualizations

### 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 Next-Level / 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)

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### 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](http://www.triveratech.com), email [Info@triveratech.com](mailto:Info@triveratech.com) or call us toll free at **844-475-4559**. Our pricing and services are always satisfaction guaranteed.

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