



## Working with Tableau and Alteryx

Enabling Better Data Handling, Processing, Viewing and Accessibility using Tableau and Alteryx

[www.triveratech.com](http://www.triveratech.com)

### Course Snapshot

- **Course:** TTDTAB102 Working with Tableau and Alteryx
- **Duration:** 2 days
- **Audience / Skill Level:** This is an **introductory-level course** for Data Analysts, Business Analysts, Data Scientists or anyone who is tasked with analyzing business data
- **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

**Working with Tableau and Alteryx** is an **introductory-level course** for Data Analysts, Business Analysts, Data Scientists or anyone new to these tools who is tasked with analyzing business data. Both Tableau and Alteryx have disrupted the world of Data Analytics by offering solutions accessible to the analyst (beyond the realm of the coders and programmers), boosting their productivity and their time to insight along the way. Those solutions combine offer to the analyst full control over the data processing chain, from the moment it is extracted, to the moment it is consumed.

Each solution has its strengths:

- Tableau is a great tool to explore data, and Alteryx is a great tool to prepare data in sequence
- Alteryx is a great tool to blend data, and Tableau is a great tool to share data
- Tableau is hiding the complexity from the users, Alteryx is exposing it

NOTE: The 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 these tools and their current features, benefits and functionality in a wide array of uses. This is not Official Vendor Training.

### Learning Objectives

This course combines engaging lecture, demos, group activities and discussions with machine-based student labs and project work.

Working in a hands-on learning environment led by our expert practitioner, students will explore:

- Connecting to Data Sources - Connecting to text, Excel, Access, and SQL files
- Creating Univariate Charts
- Creating Bivariate Charts
- Creating Multivariate Charts
- Creating Maps
- Calculating User Defined Fields
- Customizing and Saving
- Working with Advanced Features
- Working with JSON Data
- Server Architecture
- Clustering and Means Analysis
- Time Series Forecasting

**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 Alteryx, 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** course geared for attendees who want a quick introduction to working with both Tableau and Alteryx, or for those who want a refresher of the basics or newer features. Individuals working with data—regardless of technical or analytical background—are a fit for this course.

**Next Steps / Follow-On Courses:** We offer a wide array of ‘next-step’ Alteryx and Tableau courses for various skill levels and roles. Please see our detailed **Training Suite** list of offerings for the complete tooling, 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 Coaching & Mentoring Services** and **Extended Learning Support & Post Training** services.

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## 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.*

### Part 1: Working with Tableau

#### Day One: Morning

##### Session 1: Connecting to Data Sources

- Connecting to text, Excel, Access, and SQL files
- Pasting from a clipboard
- Connecting to other databases
- Connecting to Windows Azure Marketplace
- Understanding dimensions and measures
- Changing data types
- Applying filters
- Merging multiple data sources

##### Session 2: Creating Univariate Charts

- Creating tables
- Creating bar graphs
- Creating pie charts
- Sorting the graphs
- Creating histograms
- Creating line charts
- Using the Show Me toolbar
- Creating stacked bar graphs
- Creating box plots
- Showing aggregate measures
- Showing the top 10 items

##### Session 3: Creating Bivariate Charts

- Creating tables
- Creating scatter plots
- Swapping rows and columns

- Adding trend lines
- Selecting color palettes
- Using dates

##### Session 4: Creating Multivariate Charts

- Creating facets
- Creating area charts
- Creating bullet graphs
- Creating dual axes charts
- Creating Gantt charts
- Creating heat maps
- Dueling with dual axes
- Creating animated visualizations
- Correcting data exports from Tableau to Excel
- Blending data
- Optimizing tips for efficient, fast visualization

#### Day One: Afternoon

##### Session 5: Creating Maps

- Setting geographic roles
- Placing marks on a map
- Overlaying demographic data
- Creating choropleth maps
- Using polygon shapes
- Customizing maps
- Introduction to Dashboards
- Using external data to enrich your dashboard
- Using custom geocoding in Tableau

##### Session 6: Calculating User Defined Fields

- Hierarchies for revealing the dashboard message
- Classifying your data for dashboards
- Using predefined functions
- Calculating percentages
- Applying the If-Then logic
- Applying logical functions
- Showing totals
- Showing the percentage of totals
- Guided analytics with Tableau
- Discretizing data
- Manipulating text
- Aggregating data
- Creating choices in dashboards using conditional logic
- String manipulation in dashboards

##### Session 7: Customizing and Saving

- Adding title and caption
- Modifying font sizes and colors
- Applying various marks
- Adding colors, labels
- Changing marks sizes
- Adding reference lines
- Printing to PDF
- Saving packaged workbooks
- Creating a workbook data extract
- Sharing your results in a meeting
- Packaging workbooks with data
- Publishing dashboards to Tableau

- Server
- Publishing dashboards to Tableau Public
- Notes and annotations

**Session 8: Exploring and Sharing**

- Saving a workbook on a Tableau server
- Saving a workbook on the Web
- Sizing to make a data story
- Exporting images
- Exporting data

**Session 9: Exploring Advanced Features**

- Viewing data
- Changing the mark size
- Using the presentation mode
- Adding annotations
- Excluding data on the fly

- Customizing mark shapes
- Adding drop-down selectors
- Adding search box selectors
- Adding slider selectors
- Actions and interactions
- Drilling into the details
- Working with input controls
- Creating dashboards
- Creating parameters
- Using parameters in dashboards
- Mobilizing your dashboards
- Mixing Tableau with Power BI

**Part 2: Working with Alteryx****Day Two: Morning**

- Using the RegEx Tool
- Using the Formula Tool
- Blending Data Overview
- Combining Data by Column Name
- Combining Data by Column

**Position**

- Combine Data with Different Fields and Headings
- Join Two data sets using Key Fields
- Blending Memory Considerations

**Day Two: Afternoon**

- Join Multiple Data Streams on Key Fields
- Parsing JSON Data
- Downloading JSON
- Introduction to Geocoding and Drive Time
- Regression Analysis
- Server Architecture
- AB Analysis
- Clustering and Means Analysis
- Time Series Forecasting
- Market Basket Analysis

**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**

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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