Introduction to Tableau Desktop (2 Days)

This Introduction to Tableau Desktop training course is designed for professionals in a variety of job roles who are currently using desktop or web-based data-management tools to perform numerical or general data analysis. This includes capturing and reporting on data to peers, executives, and clients. These professionals must also provide data visualizations in reports, or explain data analysis through visualizations.

This course is also designed for students who plan to obtain Tableau Desktop Qualified Associate certification, which requires candidates to pass the Desktop Qualified Associate exam.

Goals

- Learn to identify and configure basic functions of Tableau.
- Learn to connect to data sources, import data into Tableau, and save Tableau files.
- Learn to create views and customize data in visualizations.
- Learn to manage, sort, and group data.
- Learn to save and share data sources and workbooks.
- Learn to filter data in views.
- Learn to customize visualizations with annotations, highlights, and advanced features.
- Learn to create maps, dashboards, and stories.

Class Prerequisites

Experience in the following *is required* for this Tableau class:

- Experience managing data with Microsoft® Excel or Google Sheets.

Course Outline

Tableau Fundamentals
    Overview of Tableau
    Navigate the Tableau Interface and Configure Settings

Connecting to and Preparing Data
    Prepare Data for Analysis
    Save Workbook Files

Exploring Data
    Create a View
    Customize Data in Visualizations

Managing, Sorting, and Grouping Data
    Adjust Fields
    Sort Data
    Group Data

Saving and Sharing Data
    Save and Publish Data Sources
    Share Workbooks for Collaboration

Filtering Data
    Configure Worksheet Filters
    Apply Advanced Filter Options
    Create Interactive Filters

Customizing Visualizations
    Format and Annotate Views
    Highlight Data
    Create Advanced Visualizations

Creating Maps, Dashboards, and Stories
    Create Maps
    Create Dashboards
    Create Stories