

## TDT-B: Tableau Desktop Training (Basic)

Course Code: TDT-B  
Duration: 2 days  
Instructor-led Training (ILT) | Virtual Instructor-led Training (VILT)

### OVERVIEW

Learn the fundamentals of Tableau Desktop in this introductory course. In this 2-day instructor-led course, you'll gain a comprehensive introduction to data analysis and visual design to build a range of visualizations—from single worksheets to dashboards—and learn techniques to apply to your own data analysis with Tableau.

### SKILLS COVERED

- Connect to data to edit its source
- Gather data for sorting, filtering and grouping
- Use the Tableau Workspace to create visualizations
- Build a range of essential chart types for analysis
- Create basic calculations, including quick table calculations
- Design interactive dashboards to reveal data insights
- Describe how to share and publish visualizations

### WHO SHOULD ATTEND?

- Admin
- Architect
- Business Analyst
- Consultant
- Designer
- End User
- Markerter

### PREREQUISITES

PREPARE FOR YOUR TRAILHEAD COURSE BY COMPLETING THIS PREWORK BEFORE YOUR SESSION STARTS

### MODULES

#### MODULE 1: INTRODUCTION TO TABLEAU

- DISCOVER THE TABLEAU PLATFORM
- LEARN APPLICATION TERMINOLOGY
- IDENTIFY VISUAL CUES FOR FIELDS

#### MODULE 2: TABLEAU WORKFLOW

- UNDERSTAND THE TABLEAU WORKFLOW
- RECOGNIZE ELEMENTS OF A VISUALIZATION
- GET STARTED IN TABLEAU

#### MODULE 3: CONNECTION AND DATA SOURCE SETUP

- IDENTIFY TABLEAU FILE TYPES AND EXTENSIONS
- CREATE A LIVE DATA CONNECTION
- SAVE AND EDIT A DATA SOURCE
- MODIFY DATA ATTRIBUTES
- UNDERSTAND CHANGES TO DATA

#### MODULE 4: DATA SIMPLIFICATION AND SORTING

- FILTER DATA
- CREATE DATE FILTERS
- SORT DATA

#### MODULE 5: DATA ORGANIZATION

- USE GROUPS
- CREATE AND USE HIERARCHIES

#### **MODULE 6: SPECIFIC VALUES**

- CREATE CROSSTABS
- GENERATE GRAND TOTALS, SUBTOTALS, AND CHANGING AGGREGATION
- BUILD HIGHLIGHT TABLES

#### **MODULE 7: DATA BY DATE**

- WORK WITH DATES IN TABLEAU
- USE DISCRETE DATE PARTS AND CONTINUOUS DATE VALUES

#### **MODULE 8: MULTIPLE MEASURES IN A VIEW**

- MEASURE VALUES AND NAMES
- COMBINE OR SHARE AXIS CHARTS
- CREATE DUAL AXIS CHARTS

#### **MODULE 9: RELATIONSHIPS BETWEEN NUMERICAL VALUES**

- SHOW CORRELATIONS AND OUTLIERS WITH SCATTER PLOTS  
CREATE A SCATTER PLOT
- ANALYZE USING THE HIGHLIGHTER
- ANALYZE AN OUTLIER WITH THE DATA GUIDE
- USE THE ANALYTICS PANE
- BUILD TREND LINES AND MODELS
- REFERENCE LINES AND BANDS

#### **MODULE 10: GEOGRAPHIC DATA MAPPING**

- MAP IN TABLEAU
- NAVIGATE AND SELECT IN MAPS

#### **MODULE 11: DATA CUSTOMIZATION**

- CALCULATE IN TABLEAU
- CHOOSE BETWEEN CALCULATION TYPES
- CREATE AND EDIT CALCULATED FIELDS
- FOLLOW FORMULA EDITOR CONVENTIONS

- IDENTIFY TYPES OF CALCULATED FIELDS
- CONDUCT CALCULATIONS AND AGGREGATIONS
- USE STRING FUNCTIONS
- BUILD SPLITS AND CUSTOM SPLITS
- CONVERT TYPES
- CALCULATE DATES

#### **MODULE 12: QUICK TABLE CALCULATIONS**

- DISCOVER TABLE CALCULATIONS
- USE QUICK TABLE CALCULATIONS
- HARNESS RANK TO SHOW BIGGEST TO SMALLEST

#### **MODULE 13: BREAKDOWNS OF THE WHOLE**

- GENERATE PIE CHARTS AND PARTS OF THE WHOLE
- CREATE TREE MAPS

#### **MODULE 14: VIEW SHARING**

- BUILD DASHBOARDS
- DEMONSTRATE RELATIONS BETWEEN DASHBOARDS AND WORKSHEETS
- GENERATE TILED OR FLOATING OBJECTS
- FORMAT COMPONENTS
- CHANGE DASHBOARD DEVICE LAYOUTS
- CONDUCT DASHBOARD ACTIONS
- PUBLISH YOUR DASHBOARD ONLINE

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