# Tableau Desktop Fundamentals - TTDTAB006

Become a Tableau Pro in two days! Get hands-on with data and build real Tableau skills to support better decisions and everyday business reporting.

**Duration:** 2 Days
**Skill Level:** Introductory
**Available Format:** Instructor-Led Online; Instructor-Led, Onsite In Person ; Blended; On Public Schedule

This course is the perfect starting point for anyone looking to turn raw data into eye-catching, interactive visualizations. In just two hands-on days, you will build practical skills in connecting to data, creating stunning charts and maps, and designing interactive dashboards that make data easy to understand and share. Whether you are a data analyst, business professional, or project manager, you will leave with the confidence to tell data-driven stories and make smarter decisions using one of the most powerful tools in the industry. No prior Tableau experience? No problem. This course will get you up to speed with practical techniques and plenty of hands-on practice.

# What You'll Learn

## Overview

Tableau Desktop Fundamentals gives you the hands-on experience you need to start building clear, useful data visuals with confidence. Tableau is one of the most trusted tools for exploring data, answering real business questions, and sharing insights in a way that actually gets used. If you are new to Tableau and want a practical, engaging way to learn the tool while building skills you can use right away, this course is designed for you.

Led by a live expert, this class is focused on doing—not just watching. You will spend over half your time working through real-world projects that help you build charts, maps, and dashboards from the ground up. Along the way, you will learn how to shape your data, apply filters, create calculated fields, and organize your results so they are clear,

focused, and ready to share. Each activity is designed to reflect the kind of questions and tasks you face on the job, so you can start applying what you learn immediately.

By the end of the course, you will be able to create polished, interactive dashboards that help your team make better decisions. You will know how to take raw data and turn it into something meaningful, visual, and easy to explore. This course helps you build real Tableau skills that support business reporting, analysis, and day-to-day communication. No previous experience with Tableau, reporting tools or data visualization is required.

**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.

## Objectives

The goal of **Tableau Desktop Fundamentals** is to help you build confidence and real skills using Tableau to turn data into useful, easy-to-understand visuals that support better decisions at work. By the end of the course, you will be able to:

- Understand the basics of working with Tableau, including how to navigate the interface, use key features, and get comfortable with visual analytics tools.
- Connect to different types of data sources and understand how Tableau handles live and static data.
- Create and customize a variety of charts, such as bar charts, scatterplots, line charts, pie charts, and heat maps to answer real business questions.
- Organize and manage your data using filters, groups, hierarchies, and calculated fields to control what your audience sees.
- Work with dimensions, measures, and marks to shape and format your visuals in a way that is clear and informative.
- Design interactive dashboards that bring your findings together and allow others to explore the data with filters, tooltips, and clean layouts.
- Save, publish, and share your work so your team can use your insights, and manage your data sources with confidence.

**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

This introductory-level course is designed for new users who want to start using Tableau for data analysis and business reporting. It is a great fit for anyone curious about business intelligence tools, including analysts, project managers, operations staff, and other professionals who work with data in their roles. There are no specific requirements for the course. Just a few business skills you should be familiar with, as listed below.

## Pre-Requisites

This course is designed for new users who want to start using Tableau for data analysis and business reporting. It is a great fit for anyone curious about business intelligence tools, including analysts, project managers, operations staff, and other professionals who work with data in their roles. No prior experience with Tableau, reporting tools or data visualization is required.

To get the most out of this course, you should be comfortable with:
- Basic computer skills and navigating software applications
- Reading and interpreting simple data tables or spreadsheets
- Understanding the kinds of questions your team or business is trying to answer with data

TTDTAB010          Getting Started with Tableau Prep

## 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.*

**Getting Started with The Tableau Environment**
- Tableau Products
- What is a Data Visualization?
- The Viz
- The Start Page
- The Tableau Interface

- Workbooks and Sheets
- Navigating Workbooks and Sheets

## Connecting to Data

- The Role of Data in Tableau
- Static vs. Live Data Sources
- Types of Data Sources
- Establishing a Data Connection
- Editing a Data Source
- Data Source Page
- Data Grid vs. Metadata Grid
- Refreshing a Data Source
- What Happens When You Connect to Data?

## Creating a Visualization

- The Data Pane
- Data Types
- Changing Data Types
- Dimensions and Measures
- Tableau-Generated Fields
- Understanding Dimensions
- Understanding Measures
- Searching for a Field
- Understanding Shelves
- Building a View
- The View Area
- What is Show Me?

## Saving, Publishing, and Sharing

- Saving Visualizations
- Publishing Visualizations
- Saving Data Sources
- Location of Saved Data Sources
- Publishing Data Sources

## Chart Types and Uses

- Tabular Data (Crosstabs or Pivot Tables)
- Pie Charts
- Line Charts

- Bar Charts
- Heat Maps (Density Maps)
- Highlight Tables
- Treemap Charts
- Gantt Charts
- Bullet Graphs
- Scatterplots
- Types of Correlation
- Outliers
- Histograms

## Discrete vs. Continuous

- Discrete vs. Continuous
- Converting Fields Between Discrete and Continuous
- Using Totals and Aggregation
- Understanding Discrete and Continuous Time
- Convert a Measure to a Dimension

## Adding Visual Details

- Understanding Marks
- Marks Card
- Text Mark
- Shape Mark
- Bar Mark
- Line Mark
- Titles and Captions
- Legends
- Tooltips
- Tooltip Command Buttons
- Annotations
- Creating Annotations
- Formatting Annotations

## Formatting Basics

- Formatting a Workbook
- Themes
- Editing Axes
- Changing Axis Range
- Editing Tick Marks

- Formatting Fields
- Formatting Field Labels
- Formatting Numbers and Null Values
- Resizing Tables and Cells

## Working with Multiple Measures

- Working with Multiple Measures in a View
- Adding Individual Axes for Each Measure
- Creating Combined (Blended) Axis Charts
- Understanding a Dual Axis Chart
- Creating a Dual Axis Chart

## Organizing, Filtering, and Sorting

- Hiding Fields
- Data Properties
- Renaming Fields
- Creating Aliases
- Sorting Data
- Sorting Options
- Creating Folders
- Creating Hierarchies
- Using Hierarchies
- Drill Up or Down a Hierarchy
- Understanding Filters
- Creating Filters
- Applying a Filter
- Filtering Qualitative Data (Dimensions)
- Filtering Quantitative Data (Measures)
- Creating Groups
- Creating Sets

## Mapping Data Geographically

- Understanding Mapping Concepts
- Latitude and Longitude
- Working with Location Data
- Creating a Simple Map
- The View Toolbar

## Using Calculations

- Understanding Calculations
- Creating a Calculated Field
- Formatting Calculations
- Working with Functions
- Working with Aggregates
- Applying Quick Table Calculations

**Creating Dashboards**

- What is a Dashboard?
- Building a Dashboard
- Dashboard Interactivity
- Creating Dashboards for Different Devices
- Dashboard Size Options
- Tiled vs. Floating Items
- Switching Between Tile or Float

**Creating Stories**

- What is a Story?
- The Story Workspace
- Creating a Story

## Follow On Courses

TTDTAB007      Advanced Tableau Desktop / Tableau Desktop II

## Related Courses

TTDTAB005      Tableau Server Administration
TTDTAB010      Getting Started with Tableau Prep
TTDTAB006      Tableau Desktop Fundamentals
TTDTAB007      Advanced Tableau Desktop / Tableau Desktop II

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**Ways to Learn**: At Trivera, we believe that Experience is Everything. Our customizable, hands-on courses are delivered live online, onsite, or in a blended format for maximum flexibility. We provide real-time expert-led training and coaching for all skill levels, from small groups to enterprise-wide programs, ensuring every learner gains the latest, most relevant job-ready skills they can apply with confidence. This course is also available for individuals or small groups on our extensive Public Schedule (see current dates below). We look forward to helping you take the next steps in your modern web developer learning journey.

# For More Information

Please contact us or call 844-475-4559 toll free for more information about our training services (instructor-led, self-paced or blended), coaching and mentoring services, public course enrollment or questions, partner programs, courseware licensing options and more.