

Getting Started with Tableau Prep - TTDTAB010

Learn how to clean, combine, and organize your data so it is ready for accurate, reliable reporting and dashboards.

Duration: 2 Days

Skill Level: Introductory

Available Format: Instructor-Led Online; Instructor-Led, Onsite In Person ; Blended;
On Public Schedule

Learn how to clean and prepare your data so it is easier to work with, easier to trust, and ready for reporting. This class gives you practical, hands-on experience using a powerful tool to fix messy values, join different data sources, reshape tables, and create reusable data flows. You will build the skills to handle real data challenges like missing values, incorrect data types, or inconsistent field names. You will also learn how to group, filter, pivot, and combine data in ways that save time and make your insights more reliable. Whether your goal is to support better dashboards or just make sure your data is clean before sharing it, this course helps you work more confidently with the information your team relies on. The format is interactive and engaging, with lots of step-by-step practice and expert support throughout. Everything you do in class reflects the kinds of tasks people face on the job every day. No experience with Tableau Prep is required, and all concepts are taught in a clear, approachable way. If you have worked with spreadsheets and are ready to spend less time fixing data and more time using it, this course is a great next step.

What You'll Learn

Overview

Tableau Prep helps you clean, combine, and shape your data so it is ready for analysis and reporting. Preparing data well is one of the most valuable skills in any business role that depends on clear, accurate information. **Getting Started with Tableau Prep** is a workshop-style, expert-led course designed for business users and team members who want to feel more confident working with real-world data and need a practical way to get

started with Tableau Prep. You do not need to know Tableau Desktop in advance to attend, but if you have seen or used it before, that can be helpful.

This class is very hands-on, with about half the time spent actively working in the tool on guided exercises and projects. You will learn how to connect to different types of data, remove errors, group and clean values, rename fields, and organize your flows in a way that is easy to update and reuse. You will also work with joins and unions, build calculated fields, use parameters, and output your cleaned data into formats your team can use right away. Every skill is taught through real examples, so you are learning by doing, not just watching.

By the end of the course, you will be able to manage the full process of preparing data in Tableau Prep with confidence. Whether you support dashboards, create reports, or just want your data to be cleaner and more useful, you will leave class ready to apply your new skills right away. This course is built for new users with no prior experience in Tableau Prep, and it is ideal for analysts, project leads, and business professionals who want to spend less time struggling with messy data and more time sharing clear insights.

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 this course is to help you build real, hands-on skills for getting your data clean, organized, and ready to use in reports and dashboards. By the end of the course, you will be able to:

- Connect to different types of data sources, including spreadsheets, databases, and PDFs, and manage those connections with ease.
- Clean messy data by removing extra fields, fixing data types, grouping similar values, and handling missing or unexpected entries.
- Combine data using joins and unions, and troubleshoot common issues when working with multiple tables.

- Apply filters, rename fields, and create calculated fields to shape your data in ways that support better reporting.
- Use Tableau Prep tools like the Profile Pane, Clean Step, and Data Interpreter to explore and organize your data visually.
- Build, save, and reuse data flows that make it easy to keep your data clean and up to date for your team.

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

This introductory-level course is designed for beginners who are new to Tableau Prep and want to learn how to prepare and clean data for reporting or dashboards. It is a great fit for analysts, business professionals, operations staff, and anyone who works with data and wants to make it more usable and accurate. You do not need any experience with Tableau Prep, but it helps to be familiar with basic data concepts like tables and fields.

Pre-Requisites

This course is designed for beginners who are new to Tableau Prep and want to learn how to prepare and clean data for reporting or dashboards. It is a great fit for analysts, business professionals, operations staff, and anyone who works with data and wants to make it more usable and accurate. You do not need any experience with Tableau Prep, but it helps to be familiar with basic data concepts like tables and fields.

To get the most out of this course, you should:

- Feel comfortable reading and working with spreadsheets or tabular data
- Understand what rows, columns, and field names represent
- Have a general idea of the types of data your team or organization uses for analysis or reporting

TTDS6022 Data Literacy Basics for Everyone

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.

Exploring Tableau Prep

- Understanding Tableau Products
- Tableau User Roles
- What is Tableau Prep?
- The Start Page
- Opening an Existing Flow
- Tableau Prep Workspace
- Visual Dictionary
- Basic Steps of Data Preparation

Connecting to Data

- Connecting to Data
- Types of Data Sources
- Adding a Connection
- Initial SQL
- Accessing Data in PDFs
- The Input Pane
- The Data Interpreter
- Key for the Data Interpreter
- Editing or Removing a Connection
- Replacing a Data Connection
- Starting a New Flow
- Saving a Flow

The Input Step

- What is the Input Step?
- Input Step Cleaning
- Hiding Fields
- Removing Unwanted Fields
- Filtering
- Renaming Fields

- Changing Data Types
- Including Row Numbers
- Changes Tab
- Settings Tab
- Data Sample Tab
- Sampling Methods
- Tables Tab
- Union Multiple Tables
- Understanding Linked Keys and Joining Data
- Refreshing Data

Examining the Data

- Understanding Steps
- Step Types
- Adding or Inserting Steps
- Adding a Clean Step
- The Profile Pane
- The Toolbar
- Size and Value Details
- Nulls, Outliers, and Unexpected Values
- Distribution of Values or Unique Values
- Searching for Fields and Values
- Editing, Sorting, and Filtering Values
- Reordering Fields (Moving Profile Cards)
- Highlighting
- Changing Data Types
- Using and Adding Data Roles
- Basics of Data Preparation

Cleaning (Clean Step)

- Adding a Clean Step
- Using Smart Recommendations
- Applying Cleaning Operations
- Cleaning Options
- Quick Cleaning Operations: Strings
- Quick Cleaning Operations: Dates
- Viewing Your Changes
- Order of Operations
- Renaming Fields in Bulk

- Merging Fields
- Grouping Values
- Mapping Multiple Values to a Single Selected Field
- Creating a Group by Selecting Multiple Values
- Adding Values Not in the Group
- Using Fuzzy Match
- Pausing Updates

Integration (Join and Union Steps)

- Combining Data
- Union
- Join
- Join Types
- Joining Tables
- Common Join Issues

Transformation

- Filtering Methods
- The Aggregate Step
- Aggregating or Grouping Data
- The Pivot Step and Calculated Fields
- Pivoting Data
- The Pivot Step
- Pivoting Columns to Rows
- Pivoting Rows to Columns
- Calculated Fields
- Calculating Level of Detail
- Using Calculation Editor and Visual Calculation Editor
- Calculating Rank or Row Number
- Ranking Information
- Creating a Rank Calculation
- Tile Calculations
- Using Multi-Row Calculations
- New Rows Step
- Using Parameters in Flows
- Creating a Parameter
- Using a Parameter

The Output Step

- Saving or Packaging Flows
- Viewing Flow Output in Tableau Desktop
- Understanding .hyper
- The Output Step
- Creating Extracts
- Saving to External Databases
- Creating Published Data Sources
- Refreshing Data
- Reusable Flow Steps

Organizing the Flow

- Reorganizing the Flow Layout
- Moving Steps
- Grouping Steps
- Removing Steps
- Adding Descriptions to Flow Steps and Change Entries
- Using Flow Navigator

Follow On Courses

TTDTAB006 Tableau Desktop Fundamentals

Related Courses

TTDTAB006 Tableau Desktop Fundamentals
TTDTAB007 Advanced Tableau Desktop / Tableau Desktop II
TTDS6022 Data Literacy Basics for Everyone

Setup Made Simple! All of our AI for Business course software, digital course files or course notes, labs, data sets and solutions, live coaching support channels and rich extended learning and post training resources are provided for you in our easy access, single source, no install required online Learning Experience Platform (LXP), remote lab and content environment. Or we can provide a local installation (trial edition) to setup and use on your machine. Access periods and versions vary by course. Please inquire about set up details and options for your specific course of interest. Regardless of setup option, we will collaborate with you to ensure your team is set up and ready to go well in advance of the class.

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.