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PHOENIX TS

# Tableau Desktop Fundamentals

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## Course Overview

This 1-day, online, instructor led Tableau Fundamentals course will introduce participants to Tableau software. It covers:

- Worksheets
- Dashboards
- Data Stories

This course is intended for:

- Those familiar with using desktop and/or web-based data management tools to perform data analysis related tasks
- Some experience with Microsoft, Excel and Google Sheets

## Schedule

Currently, there are no public classes scheduled. Please contact a Phoenix TS Training Consultant to discuss hosting a private class at 301-258-8200.

## Course Objectives:

By the end of this course, participants will be able to:

- Identify and configure basic functions of Tableau.
- Connect to data sources, import data into Tableau, and save Tableau files.
- Create views and customize data in visualizations.
- Manage, sort, and group data.



# PhoenixTS

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- Save and share data sources and workbooks.
- Filter data in views.
- Customize visualizations with annotations, highlights, and advanced features.
- Create and enhance dashboards in Tableau.
- Create and enhance stories in Tableau.

## Course Outline

### Module 1: Tableau Fundamentals

- Overview of Tableau
- Navigate and Configure Tableau

### Module 2: Connecting to and Preparing Data

- Connect to Data
- Build a Data Model
- Save Workbook Files
- Prepare Data for Analysis

### Module 3: Exploring Data

- Create Views
- Customize Data in Visualizations

### Module 4: Managing, Sorting, and Grouping Data

- Adjust Fields
- Sort Data
- Group Data

### Module 5: Saving, Publishing, and Sharing Data

- Save Data Sources
- Publish Data Sources and Visualizations
- Share Workbooks for Collaboration

## Module 6: Filtering Data

- Configure Worksheet Filters
- Apply Advanced Filter Options
- Create Interactive Filters

## Module 7: Customizing Visualizations

- Format and Annotate Views
- Emphasize Data in Visualizations
- Create Animated Workbooks
- Best Practices for Visual Design

## Module 8: Creating Dashboards in Tableau

- Create Dashboards
- Enhance Dashboards with Actions
- Create Mobile Dashboards

## Module 9: Creating Stories in Tableau

- Create Stories
- Enhance Stories with Tooltips

## Exam Information

This course can help students who want to prepare for the Tableau Desktop Qualified Associate certification, which requires candidates to pass the Tableau Desktop Certified Associate exam.

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