Faysal Aziz

Tableau Foundations

Practical Skills for Immediate Impact - 2 days

FA-0432 · 2 days

DevOps, Cloud & Infrastructure · Data & Analytics

Introduction

In a data-first world, the ability to quickly turn raw data into intuitive visuals is a competitive advantage. Over two days, this course equips participants with industry-tested workflows in Tableau Desktop and Cloud. Grounded in three decades of real-world BI consulting, it emphasizes hands-on application, practical problem solving, and real datasets—no fluff, no theory.

With 30+ years spanning BI consulting, data warehousing, and dashboard development across finance, retail, and healthcare, the instructor delivers industry-centered training. You'll work with real client-style datasets, explore best-practice governance, and build dashboards built to solve real challenges.

Learning outcomes

Participants will be able to:

- Install and navigate Tableau Desktop
- Connect to diverse data sources, apply joins, blends, extracts
- Create core chart types (bar, line, scatter, pie, histogram, maps)
- Build interactive dashboards with filters, parameters, actions
- Use calculations, table calculations, and Level of Detail (LOD) expressions
- Leverage analytics features: trend lines, reference lines, forecasting
- Implement best practices in dashboard design and data governance
- Publish to Tableau Cloud and manage permissions and data refreshes

Prerequisites

- Basic spreadsheet familiarity (Excel/Google Sheets)

- No prior Tableau or BI tool experience required

Training outline

1. Getting Started and Setup

- Overview of Tableau product ecosystem (Desktop, Cloud, Prep Builder, Public)
- Installing Tableau; working with .twb, .twbx files; interface fundamentals

2. Connecting to Data

- Connecting to Excel, CSV, SQL, cloud sources
- Comparing live connections vs. extracts
- Joins, unions, blends, relationships in modern semantic data model

3. Core Visual Analytics

- Differentiating dimensions vs. measures; discrete vs. continuous
- Creating bar, line, scatter, pie, histogram, and map charts
- Introduction to Show Me panel for quick chart generation

4. Calculations and Data Structuring

- Basic calculated fields: arithmetic, date, string, logical
- Table calculations: running totals, percent of total, ranking
- LOD expressions: FIXED, INCLUDE, EXCLUDE for advanced aggregation

5. Intermediate Charts and Analytics

- Building advanced charts: dual-axis, bullet, waterfall
- Adding reference lines, bands, trend lines, forecasting
- Intro to clustering and sets for segment analysis

6. Interactive Dashboards

- Combining worksheets into dashboards; layout and formatting principles
- Adding filters, parameters, highlight and URL actions
- Custom tooltips and interactivity for user-driven insights

7. Mapping and Geo-Analytics

- Working with geographic data (cities, postal codes, lat/long)
- Advanced mapping techniques: layers, territories, custom shapes

8. Data Preparation and Cleansing

- Tableau Prep basics: cleaning, pivoting, shaping
- Using relationships to maintain clean data models

9. Publishing, Governance, and Cloud Features

- Publishing workbooks and data sources to Tableau Cloud
- Setting refresh schedules, managing permissions
- Custom themes, formatting, naming conventions, folder structures

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