

Tableau Desktop Certified Associate

Learn to connect, prepare, analyse and visualize data in Tableau Desktop, from calculations to interactive dashboard publishing.

5 Days

DURATION

4

MODULES

97

TOPICS

COURSE OVERVIEW

This training provides a comprehensive introduction to Tableau Desktop and Tableau Prep Builder, covering data connection, preparation, analysis, visualization, and publishing. The course is designed to align with the Tableau Desktop Certified Associate exam objectives and focuses on hands-on learning to help participants build interactive dashboards and perform effective data analysis using Tableau.

WHO THIS COURSE IS FOR

This course is intended for:

Aspiring and current Data Analysts

Business Intelligence (BI) professionals

Data professionals working with reports and dashboards

Individuals preparing for the Tableau Desktop Certified Associate certification

PREREQUISITES

- Basic computer skills
- Familiarity with spreadsheets and tabular data (e.g., Excel)
- Basic understanding of data concepts such as rows, columns, and measures
- No prior Tableau experience is required for foundational modules

LEARNING OBJECTIVES

- Connect to relational databases, files and published data sources
- Prepare and clean data using joins, unions and pivots
- Transform data using Tableau Prep for business scenarios
- Build calculated fields with date, string and logical functions
- Apply table calculations such as running totals and rankings
- Create parameters, sets, bins and hierarchies for analysis
- Build geographic maps and level of detail calculations
- Design dashboards with filters, actions and formatting

4 Modules, 97 Topics

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Connect to and Transform Data

1.1 CONNECT TO DATA SOURCES

- Identify data sources
- Determine live connections vs. extracts
- Connect to extracts
- Connect to files
- Connect to relational databases
- Connect to published data sources (Tableau Server / Tableau Cloud)
- Replace data sources in existing worksheets

1.2 PREPARE DATA FOR ANALYSIS

- Assess data quality (completeness, consistency, accuracy)
- Perform data cleaning operations
- Organize data fields into folders
- Use multiple data sources (relationships, joins, unions)
- Use Data Interpreter, pivot, and split
- Create extracts and data source filters

1.3 PERFORM DATA TRANSFORMATION IN TABLEAU PREP

- Choose transformations based on business scenarios
- Combine data using unions
- Combine data using joins
- Shape data using aggregations
- Perform filtering
- Shape data using pivots
- Determine appropriate output types

1.4 CUSTOMIZE FIELDS

- Change default field properties (data types, sorting)
- Rename columns
- Convert between discrete and continuous fields
- Convert between dimensions and measures
- Create aliases

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Explore and Analyze Data

2.1 CREATE CALCULATED FIELDS

- Date calculations
- String functions
- Logical and Boolean expressions
- Number functions

2.2 CREATE TABLE CALCULATIONS

- Moving and window averages
- Percent of total
- Running totals
- Difference and percent difference
- Percentile

- Type conversion functions
- Aggregate functions
- Basic spatial calculations

- Index
- Ranking
- Apply quick table calculations
- Customize table calculations

Explore and Analyze Data (continued)

2.3 CREATE AND USE FILTERS

- Filter dimensions and measures
- Top N, Bottom N, wildcard, conditional filters
- Context filters
- Apply filters across sheets and data sources

2.4 CREATE PARAMETERS FOR INTERACTIVITY

- Parameters in calculations
- Parameters with filters
- Parameters with reference lines
- Dynamic parameter refresh

2.5 STRUCTURE THE DATA

- Sets
- Bins
- Hierarchies
- Groups

2.6 MAP DATA GEOGRAPHICALLY

- Symbol maps
- Density maps
- Choropleth (filled) maps
- Mark layers

2.7 ANALYTICS PANE

- Totals and subtotals
- Reference lines
- Reference bands
- Average lines
- Trend lines
- Distribution bands
- Forecasting (default)
- Customize forecasting models

2.8 LEVEL OF DETAIL (LOD) CALCULATIONS

- FIXED LOD expressions
- INCLUDE LOD expressions
- EXCLUDE LOD expressions
- Nested LOD expressions

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Create Content

3.1 CREATE CHARTS

- Bar, line, pie, scatter, histogram, treemap, dual-axis, Gantt, box plots, area charts
- Sort data (including custom sorting)

3.2 CREATE DASHBOARDS AND STORIES

- Dashboards with containers and layouts
- Add images, text, and objects
- Create stories using story points

3.3 ADD DASHBOARD INTERACTIVITY

- Dashboard filters
- Filter, URL, and highlight actions
- Dynamic zone visibility
- Navigation buttons
- Set and parameter actions
- Show/hide dashboard objects

3.4 FORMATTING AND DESIGN

- Colors, fonts, and styling
- Custom shapes and palettes
- Annotations
- Tooltips
- Padding
- Gridlines, banding, shading
- Device-specific layouts

Publish and Manage Content

4.1 PUBLISH CONTENT

Publish workbooks · Publish data sources · Export content · Publish flows

4.2 SCHEDULE DATA UPDATES

Schedule extract refreshes

4.3 MANAGE PUBLISHED CONTENT

Create alerts · Subscriptions · Custom views · User roles and permissions · Distribute published workbooks

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

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Learn the Way That Suits You

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Live Online Classes (ILO)

Fly-Me-A-Trainer (FMAT)

Flexi (Self-Paced)

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