



# Tableau Prep Introduction

Course ISI-1537      Two days      Instructor-led

Focus on the most important and most often overlooked factor in a successful Tableau project—data. Without a reliable data source, you will not achieve the results you hope for in Tableau. This course does more than teach the mechanics of data preparation. It teaches you: how to look at data in a new way, to recognize the most common issues that hinder analytics, and how to mitigate those factors one by one

This two-day, instructor-led course is designed to provide you with the tools and knowledge of how to prepare and shape data in Tableau Prep. It's best suited for people who have 3-6 months experience in Tableau Desktop and are somewhat familiar with writing calculations. Throughout the course, our instructors will take you from conceptual data preparation material to creating useful Tableau Prep flows that can be output to Tableau Desktop for analysis.

This class is for individuals responsible for accessing organizational data and transforming it for analysis in Tableau

## Objectives

Upon successful completion of this course, students learn

- Recognize data sources that are good candidates for analytics in Tableau
- Connect to local, server, and cloud-based data sources
- Profile data to better understand its content and structure
- Rename fields, adjust data types, group data points, and aggregate numeric data
- Pivot data
- Join data from local, server, and cloud-based sources for unified analytics
- Review the steps and results of each phase of the Data Prep process
- Output new data sources that can be reviewed in Tableau or any other analytics tool

## Prerequisites

Individuals should have at least 3 months of experience with Tableau or should have taken our Tableau Desktop Level 1: Introduction or have equivalent knowledge and skills.

## Course Outline

### Module 1: What is ETL?

- Extract
- Transform
- Load

Contact ISInc for more information at 916.920.1700 or by visiting our website at <http://www.isinc.com>

## **Module 2: Introduction & Tableau Prep Builder**

- Tableau Prep Builder
- Interface
- Steps in Tableau Prep Builder
- Features of a Workflow

## **Module 3: Input and Output**

- Connect to Microsoft Excel
- Data Interpreter
- Configuration Window
- Data Sampling
- Connect to Tableau Data Extract File
- Connect to Text File
- Other Features

## **Module 4: Data Cleaning**

- Profile Pane: An In-Depth Analysis
- Functions
- Tracking Changes
- String Calculations

## **Module 5: Group and Replace**

- Automatic Group and Replace Functions
- Manual Grouping
- Examples

## **Module 6: Aggregation and Pivot**

- Aggregations
- Aggregation Functions
- Group By
- Examples
- Pivot

## **Module 7: Joins and Unions**

- Join
- Types of Joins
- Example
- Union
- Example



## **Module 8: Tableau Prep Builder Conductor**

- Tableau Prep Builder Conductor