



Tableau Creator/Desktop: Intermediate/Advanced Course

Instructor-Led Course
Virtual or On-site

Course Overview

You've learned the fundamentals of Tableau Creator Desktop and dipped a toe into more complex topics. You're ready to take your skills to the next level in our **Tableau Creator Desktop Intermediate/Advanced level course for health and healthcare professionals!**

This highly interactive live instructor-led course uses real-world health and healthcare examples, showcasing challenging problems we've encountered with current and past clients. We teach intermediate and advanced technical skills, performance improvement techniques, enterprise data considerations, and plenty more valuable and practical tools.

This course is not for beginners! We recommend at least six months of Tableau experience for most users before taking the course to ensure complete comfort and confidence about the basics. The course will be delivered through lectures with demonstration, followed by extensive hands-on practice using health and healthcare case studies in Tableau-ready workbooks. To see if you are ready, take our assessment quiz.

Learning Objectives

After taking this course, learners will be able to:

- Design data sets with the proper structure and aggregation in Tableau
- Optimize report performance
- Employ formatting best practices to get the look and feel of an infographic, C-suite dashboards, and everything in between
- Create and utilize advanced Calculated Fields, including year-over-year comparisons, rolling and parameters-based dates, nested IF/THEN statements, and more
- Navigate complex table calculations and leverage advanced Level-of-Detail Expressions
- Effectively data blend while avoiding common mistakes
- Plan for and implement "Row Level Security"
- Create advanced visualizations such as dual-axis charts and heat map calendar controls
- Use dynamic layout containers

- Understand use cases for context filters, extract filters, data source filters, and more
- Implement Tableau Server best practices from small pilots to enterprise environments

Course Details

Technology Needed: Learners need to have two screens: one to view the instructor’s step-by-step instructions; the other to follow along performing those step-by-step instructions using their Tableau software (a current version of Tableau Creator/Desktop or a trial version). The options for a secondary screen, along with the learner’s primary computer/laptop, can be any of the following:

- Secondary computer monitor (aka a dual monitor)
- Tablet/iPad
- Another computer/laptop
- TV with an HDMI cable connection
- Classroom style – projecting the instructor’s view on a wall-mounted screen

Virtual learners can access audio via phone or computer. A headset and webcam are recommended.

Software needed: Participants need a current version of Tableau Creator/Desktop installed on their computer/laptop and Microsoft Excel **before the start of the course**. Tableau provides a free [14-day trial of the software](#) (trial software cannot be downloaded more than once on a laptop/computer, so be mindful of this time limit).

Course Instructor(s): Our instructors are Tableau-certified professionals and data visualization experts with experience in public health and healthcare.

Course Resources: Learners will receive:

- A Tableau for Health & Healthcare training manual to follow along with during the course
- Training data and Tableau packaged workbooks with answer keys

Course Details

	Open to Public	Open to Just Your Team		
How is it delivered?	Virtual	Virtual	Virtual	On-site
How many can enroll?	Standard size Up to 15 Learners	Small size Up to 6 Learners	Standard size Up to 12 Learners	Standard size Up to 12 Learners
Can additional learners be added?	no	no	Up to 3 learners	Up to 3 learners

	Open to Public	Open to Just Your Team		
How is it scheduled?	four half-days 1:00 – 4:30 ET	four half-days scheduled	four half-days scheduled	two full-days 9:00 am – 4:00 pm
How is it priced?	Per seat	Flat fee	Flat fee	Flat fee plus travel costs

Course Content by Day

ONSITE COURSE DAY 1		ONSITE COURSE DAY 2	
VIRTUAL COURSE DAY 1	VIRTUAL COURSE DAY 2	VIRTUAL COURSE DAY 3	VIRTUAL COURSE DAY 4
<ul style="list-style-type: none"> • Intro and best practices overview • Hands-on: dashboard redesign exercise • Hands-on: advanced date calculations 	<ul style="list-style-type: none"> • Review: calculated fields • Hands-on: Level of detail (LOD) expressions • Hands-on: Advanced visualizations 	<ul style="list-style-type: none"> • Review: LOD expressions • Hands-on: Table calculations • Hands-on: additional advanced visualizations 	<ul style="list-style-type: none"> • Review: Table calculations • Practical: Dashboard creation exercise • Hands-on: Advanced data blending • Row-level security and distribution

Have questions about this course or need pricing information? Contact us at info@healthdataviz.com.