



# Tableau Creator/Desktop: Beginner/Intermediate Course

Instructor-Led Course  
Virtual or On-site

## Course Overview

Our **Tableau Creator/Desktop Beginner/Intermediate** course is designed for the health and healthcare professional who works with data (regardless of technical or analytical background) with a beginner to intermediate Tableau skill level. This highly interactive live instructor-led course uses real-world health and healthcare examples, showcasing situations we've encountered with current and past clients. We will teach how to connect to data, navigate the Tableau workspace, build basic data reports, create basic calculated fields, combine visualizations into interactive dashboards, and much more.

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. Our Tableau course curricula were developed to facilitate learning within health and healthcare, pharmaceutical, public, private, and payor organizations. Healthcare and public health datasets were researched and developed as the foundation for step-by-step instruction to resonate and improve lesson retention.

## Learning Objectives

After taking this course, learners will be able to:

- Connect to data and manipulate it for use in Tableau Desktop
- Configure data with relationships, table joins, and data blending
- Build intuitive reports using a variety of visualization types, such as:
  - Bar charts and their variants
  - Line charts and their variants
  - Text Table
  - Highlight Table
  - Scatter Plot / Strip Plot
  - Deviation charts
  - Maps
  - Pareto charts
- Employ data visualization best practices to build charts and production-ready dashboards
- Use the sort, filter, hierarchy, group, and formatting options effectively
- Create and use basic calculated fields, table calculations, and parameters
- Use trend lines, reference lines, and statistical techniques
- Explain important considerations for sharing visualizations with others

## 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:

- Our [Tableau for Healthcare, fourth edition](#) book 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
How is it scheduled?	four half-days 12:30 – 4:30 ET	four half-days scheduled	four half-days scheduled	two full-days 9:00 am – 4:00 pm

	Open to Public	Open to Just Your Team		
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"> <li>• Introduction and data visualization best practices overview</li> <li>• Overview of Tableau workspace</li> <li>• Hands-on: introductory chart builds</li> </ul>	<ul style="list-style-type: none"> <li>• Review: student rebuilds of a prior day's chart</li> <li>• Hands-on: basic chart builds, continued</li> <li>• Hands-on: connecting to data</li> </ul>	<ul style="list-style-type: none"> <li>• Review: student rebuilds of a prior day's chart</li> <li>• Hands-on: intermediate chart builds</li> <li>• Hands-on: dashboard creation with interactivity</li> </ul>	<ul style="list-style-type: none"> <li>• Review: student rebuilds of a prior day's chart</li> <li>• Hands-on: advanced skills</li> <li>• Hands-on: data blending</li> <li>• Report Distribution</li> <li>• Review: Table calculations</li> </ul>

Have questions about this course or need pricing information? Contact us at [info@healthdataviz.com](mailto:info@healthdataviz.com).