

Tableau Prep



Length: 2 Days / 4 Half Days

Overview: This course is designed for students who are new to Tableau Prep or have limited experience with the tool. Participants will learn the essential skills needed for effective data preparation, cleansing, and ETL processes. The course will cover how to connect to various data sources, apply data cleansing techniques, and create efficient workflows. Students will also explore best practices for shaping and validating data, enabling them to streamline their Tableau analysis and visualization processes. By the end of the course, participants will be equipped to tackle common data preparation challenges with confidence.

Objectives:

- Understand and implement preferred data structures in Tableau.
- Navigate the Tableau Prep workspace effectively.
- Apply data cleansing techniques, including joins, unions, and handling nulls.
- Determine when to use Tableau Prep versus Tableau Desktop for data preparation.
- Connect to and configure various data sources.
- Create and manage workflows for efficient data preparation.
- Clean and shape data for optimal analysis.
- Validate results and create output files using best practices.

Course Outline

- Introduction to Tableau Prep
- Overview of Tableau Prep and its purpose
- Introduction to the workspace
- Preferred Data Structures in Tableau
- Understanding optimal data formats for Tableau
- Data Cleansing and Preparation Concepts
- Joins and unions
- Wildcard matches and fuzzy matching
- Addressing nulls, irregularities, and outliers
- Data Preparation Strategies
- When to use Tableau Prep vs. Tableau Desktop
- Understanding data sampling
- Connecting to and Configuring Data
- Methods for connecting to various data sources
- Configuring data connections
- Exploring Data
- Techniques for data exploration and analysis
- Creating Workflows
- How to create and manage workflows for data preparation
- Data Cleaning and Shaping
- Techniques for cleaning data
- Methods for shaping data for analysis
- Combining and Joining Data
- Joining and unjoining data
- Best practices for data combination
- Output and Validation
- Opening a data sample and creating an output file
- Validating results of data preparation
- Best Practices and Complex Flows
- Best practices for effective data preparation
- Creating and managing complex data flows

Prerequisites

None

Materials

- All students will receive slides with lecture material, data and labs.
- Software needed on each student PC:
 - Microsoft Excel 2010 or later (2013 or later recommended)
 - Internet access
 - Tableau Prep
- Related data and lab files will be provided

Other Tableau Courses Available: Tableau Beginner, Tableau Intermediate, Tableau Advanced