

# Service Definition Document

## Tableau Desktop Fundamentals & Advanced Courses

*Pasteq Analytics Ltd - G-Cloud 14*

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### About this Document

This is the Service Definition document for training and services provided by Pasteq Analytics Ltd.

This document has been created with accessibility in mind and has been tested for accessibility. If you have any issues accessing this document or anything within in, please contact us at [hello@pasteq.co.uk](mailto:hello@pasteq.co.uk) and we will endeavour to respond to you with an accessible solution as soon as possible.

The training course and services that we provide, and supporting details for each, are included in this document.

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## About our training courses

- All of courses are delivered by experienced and certified trainers and consultants – we have trainers who are certified by best-in-class technology providers (e.g. Tableau) and who hold official training CSAT scores of 9+ out of 10.
- Our courses provide structured classroom training and include digital manuals, exercises and demo data
- All courses include both teaching and hands on practice using demo data to complete exercises using the relevant software
- They cover the full spectrum of platform knowledge (scoped to the chosen technology): this caters to complete beginners to advanced users
- Courses can be delivered virtually or in-person, based on requirements of the client
- It is assumed that all attendees will have their own computer and will have suitable software installed with a valid license (trial licenses are fine) for the duration of the training.

## Tableau Training Courses included in this listing

### Fundamentals of Tableau Desktop

#### Purpose and Target Audience

This course is designed for those with zero or little Tableau Desktop experience. This would also be suitable for those who have used Tableau Desktop for some time, but feel they are limited to very simple tasks, or who find using the software challenging. It would also be suitable as a refresher course for someone who has not used Tableau Desktop for a prolonged period.

#### Duration and Timings

- 2 days
- 9am to 5pm (this is flexible within reason)

#### Prerequisites

There are no prerequisites to attend this course.

#### Learning Outcomes

Following completion of the course, attendees will be able to:

- Use end-to-end features of Tableau Desktop, from connecting to data through to building simple dashboards.
- Complete further self-learning using these learning as a robust foundation. The course will remove the initial hurdle of getting started while having no or little existing experience.
- Use most/all fundamental functions of Tableau Desktop

#### Course Curriculum

- Navigating Tableau Desktop
- Connecting to Data
- Filtering and Sorting Data
- Using Groups and Hierarchies
- Using Dates in Tableau
- Using Multiple Measures
- Proportional Chart Types
- Calculated Fields & Parameters
- Using Context lines, Distributions & Totals
- Geographic Mapping
- Custom shapes and Colour Palettes
- Dashboards and Stories

## Tableau Desktop Advanced Principles

### Purpose and Target Audience

This course is designed for those with a good foundation of Tableau Desktop knowledge. It is recommended they have completed the fundamentals course and have had some time to use Tableau Desktop in practice. Equally, someone who is a self-learner and has used Tableau Desktop consistently for 3-6 months is likely to feel comfortable attending this course.

### Duration and Timings

- 2 days
- 9am to 5pm (this is flexible within reason)

### Prerequisites

The prerequisites to attend this course are either of the following:

- Attended Tableau Desktop Fundamentals Course
- 6 months of consistent use of Tableau Desktop

### Learning Outcomes

Following completion of the course, attendees will be able to:

- Use end-to-end features of Tableau Desktop, from connecting to data through to building simple dashboards, including some advanced techniques.
- Complete further self-learning to an advanced level, building on prior existing knowledge and knowledge gained from this course.
- Use most/all fundamental functions of Tableau Desktop and many advanced techniques.

### Course Curriculum

- Understanding Metadata
- Combining Data with Joins, Unions and Relationships
- Extracts and Performance
- Advanced Table Calculations
- Advanced Calculated Fields
- Dynamic Charts
- Advanced Sorting and Filtering
- Advanced Geographic Mapping
- Advanced Chart Types
- Introduction to Visual Best Practices
- Dashboards and Device Designer

## Other Tableau Training Courses

### Data Visualisation Best Practices in Tableau

#### Purpose and Target Audience

This course is designed for those with an existing understanding of how to use Tableau Desktop, however, they do not need to be an advanced user. It is recommended they have completed the fundamentals course and/or have had some time to use Tableau Desktop in practice. This course will enable best practice use of data visualisation, through hands on use of Tableau Desktop throughout the course.

#### Duration and Timings

- 2 days
- 9am to 5pm (this is flexible within reason)

#### Prerequisites

The prerequisites to attend this course are:

- Attended Tableau Desktop Fundamentals Course

#### Learning Outcomes

Following completion of the course, attendees will be able to:

- Understand how the human mind best interprets different visual elements in order to leverage them in practice
- Understand what data visualisation techniques are best for what applications
- Understand what chart types are suitable when, and for what applications
- Develop visualisations and dashboards that use data visualisation best practices, resulting in increased end user cognition and speed to insight

#### Course Curriculum

- Introduction to Visual Analytics
- Understanding Memory Types
- Minimising Short-term Memory
- Leveraging Sensory Memory
- Choosing the Right Chart
- Charts for Comparison
- Charts to Show Composition
- Visualising Data Over Time
- Charts for Distributions
- Geographic Mapping
- Designing Dashboards

## Tableau Prep Builder

### Purpose and Target Audience

This course is designed for those with zero or little Tableau Prep Builder experience. This would also be suitable for those who have used Tableau Prep Builder for some time, but feel they are limited to very simple tasks, or who find using the software challenging. It would also be suitable as a refresher course for someone who has not used Tableau Prep Builder for a prolonged period.

### Duration and Timings

- 2 days
- 9am to 5pm (this is flexible within reason)

### Prerequisites

There are no prerequisites to attend this course.

### Learning Outcomes

Following completion of the course, attendees will be able to:

- Use end-to-end features of Tableau Prep Builder, from connecting to data through to more complex data processing tasks.
- Complete further self-learning using these learning as a robust foundation. The course will remove the initial hurdle of getting started while having no or little existing experience.
- Use most/all fundamental functions of Tableau Prep Builder

### Course Curriculum

- Introduction to Tableau prep builder
- Data structure best practices
- Connecting to data
- Exploring data
- Cleaning data
- Combining data
- Shaping data
- Previewing and sampling data
- Data output and best practice

## Tableau Server/Online Administration

### Purpose and Target Audience

This course is designed for organisations who have Tableau Server or Online licenses, and for attendees who are, or will be, managing the administrative elements of the Tableau Server/Online installation. This course is suitable for those with zero or little Tableau Admin experience, however, attendees will gain most of they already have skills relevant for a technical administrative role.

### Duration and Timings

- 1 day
- 9am to 5pm (this is flexible within reason)

### Prerequisites

The prerequisites to attend this course are:

- Tableau Server license and administration credentials

### Learning Outcomes

Following completion of the course, attendees will be able to:

- Understand how to safely and securely manage front-end functions of Tableau Server/Online
- Manage most/all fundamental functions of Tableau Server/Online

### Course Curriculum

- Roles and responsibilities
- Tableau Server UI and landscape
- Tableau Services Manager and Server health
- Publishing workbooks, Prep flows and Data sources
- Content management
- Permissions and security
- Managing users and groups
- Schedules and Tasks
- Subscriptions



## Business Dashboard Masterclass using Tableau

### Purpose and Target Audience

This course is designed to help your Tableau users build dashboards that are suitable for business use and that are aligned to your corporate design standards. It will leverage existing Tableau Desktop knowledge while using a pre-agreed dashboard template specific to your organisation. Attendees should have completed the fundamentals course and/or have used Tableau Desktop in practice.

### Duration and Timings

- 0.5 days
- 9am to 1pm or 1pm to 5pm (this is flexible within reason)

### Prerequisites

The prerequisites to attend this course are either of the following:

- Attended Tableau Desktop Fundamentals Course (for attendees)
- 6 months of consistent use of Tableau Desktop (for attendees)
- Pre-agreed Tableau template (with management team/senior leaders)
- Pre-agreed use of brand colours, font, logos, etc. (with management team/senior leaders)

Price for this course reflects the training delivery and the custom work that will be required in advance of running this course.

### Learning Outcomes

Following completion of the course, attendees will be able to:

- Develop best practice dashboards for use within your organisation
- Use a dashboard template effectively including brand colours, fonts and logos
- Ensure best practices are used when structuring a dashboard for simple editing and resizing in future

### Course Curriculum

- Introduction to Dashboard design for Business use
- Introduction to Dashboard Templates
- Connecting real data to your template
- Preparing the workbook – template to working file
- Adding KPIs
- Adding Other Worksheets
- Dashboard Filters and Actions
- Dashboard Navigation options

## Exam Preparation Masterclass - Tableau

### Purpose and Target Audience

This course is designed to prepare attendees to complete official Tableau exams, such as the **official Tableau Certified Data Analyst exam**.

### Duration and Timings

- 1 day
- 9am to 5pm (this is flexible within reason)

### Prerequisites

The prerequisites to attend this course are the following:

- Attended Tableau Desktop Fundamentals Course
- Attended Tableau Prep Builder Course
- Had 3-6 months practice using both platforms

### Learning Outcomes

Following completion of the course, attendees will be able to:

- Confidently assess how ready they are to sit the exam
- Have improved Tableau skills needed for passing the exam
- Complete final personal preparation to the right standard for themselves to confidently pass the official Tableau exam

Unfortunately, there is no guarantee that the attendees will pass the exam following completion of this course, and it is recommended that they complete additional preparation after completing the course before sitting the exam.

### Course Curriculum

- Guidance and preparation materials
- Exam format
- Preparing to book the exam
- Payment and booking
- Exam style
- Exam Content
- Hands-on: Practice Exercises
- Recommended exercises for self-learning
- On the day of the exam
- Questions from the class

## Alteryx Training Courses

### Alteryx Designer Fundamental Principles

#### Purpose and Target Audience

This course is designed for those with zero or little Alteryx Designer experience. This would also be suitable for those who have used Alteryx Designer for some time, but feel they are limited to very simple tasks, or who find using the software challenging. It would also be suitable as a refresher course for someone who has not used Alteryx Designer for a prolonged period.

#### Duration and Timings

- 1 day
- 9am to 5pm (this is flexible within reason)

#### Prerequisites

There are no prerequisites to attend this course.

#### Learning Outcomes

Following completion of the course, attendees will be able to:

- Use end-to-end features of Alteryx Designer, from connecting to data through to combining data from different sources.
- Complete further self-learning using these learning as a robust foundation. The course will remove the initial hurdle of getting started while having no or little existing experience.
- Use most/all fundamental functions of Alteryx Designer.

#### Course Curriculum

- Introduction to Alteryx
- Constructing a Workflow
- Data input and output
- Introduction to Data Blending
- Intermediate Data Blending
- Publishing and using the workflow

## Alteryx Designer Advanced Principles

### Purpose and Target Audience

This course is designed for those with a good foundation of Alteryx Designer knowledge. It is recommended they have completed the fundamentals course and have had some time to use Alteryx Designer in practice. Equally, someone who is a self-learner and has used Alteryx Designer consistently for 3-6 months is likely to feel comfortable attending this course.

### Duration and Timings

- 2 days
- 9am to 5pm (this is flexible within reason)

### Prerequisites

The prerequisites to attend this course are either of the following:

- Attended Alteryx Designer Fundamentals Course
- 6 months of consistent use of Alteryx Designer

### Learning Outcomes

Following completion of the course, attendees will be able to:

- Use end-to-end features of Alteryx Designer, from connecting to data through to complete data blending, and an introductory knowledge of building apps and macros.
- Complete further self-learning to an advanced level, building on prior existing knowledge and knowledge gained from this course.
- Use most/all fundamental functions of Alteryx Designer and many advanced techniques.

### Course Curriculum

- Basic Macros
- Basic Analytics Apps
- Introduction to Spatial Workflows
- Introduction to Predictive Analysis
- Advanced macros
- Advanced apps
- Building a spatial workflow
- Alteryx Gallery
- What predictive and visual analysis is possible with Alteryx?
- Predictive Analytics toolbox
- Time Series Analysis
- Clustering algorithms and the Predictive Grouping Toolbox

## Power BI Training courses

### Power BI Fundamental Principles

#### Purpose and Target Audience

This course is designed for those with zero or little Power BI experience. This would also be suitable for those who have used Power BI for some time, but feel they are limited to very simple tasks, or who find using the software challenging. It would also be suitable as a refresher course for someone who has not used Power BI for a prolonged period.

#### Duration and Timings

- 2 days
- 9am to 5pm (this is flexible within reason)

#### Prerequisites

There are no prerequisites to attend this course.

#### Learning Outcomes

Following completion of the course, attendees will be able to:

- Use end-to-end features of Power BI, from connecting to data through to building simple dashboards.
- Complete further self-learning using these learning as a robust foundation. The course will remove the initial hurdle of getting started while having no or little existing experience.
- Use most/all fundamental functions of Power BI

#### Course Curriculum

- Introduction to Power BI
- Connecting to Data
- Customising Data
- Basic Visualisations I
- Interacting with Data
- Basic Formatting
- Calculated Columns
- Basic Visualisation II
- Sharing/Publishing
- Shaping data using the query editor
- Measures
- Links to other programs
- Wrap-up

## Data Visualisation Best Practices in Power BI

### Purpose and Target Audience

This course is designed for those with an existing understanding of how to use Power BI, however, they do not need to be an advanced user. It is recommended they have completed the fundamentals course and/or have had some time to use Power BI in practice. This course will enable best practice use of data visualisation, through hands on use of Power BI throughout the course.

### Duration and Timings

- 2 days
- 9am to 5pm (this is flexible within reason)

### Prerequisites

The prerequisites to attend this course are:

- Attended Power BI Fundamentals Course

### Learning Outcomes

Following completion of the course, attendees will be able to:

- Understand how the human mind best interprets different visual elements in order to leverage them in practice
- Understand what data visualisation techniques are best for what applications
- Understand what chart types are suitable when, and for what applications
- Develop visualisations and dashboards that use data visualisation best practices, resulting in increased end user cognition and speed to insight

### Course Curriculum

- Introduction to Visual Analytics
- Understanding Memory Types
- Minimising Short-term Memory
- Leveraging Sensory Memory
- Choosing the Right Chart
- Charts for Comparison
- Charts to Show Composition
- Visualising Data Over Time
- Charts for Distributions
- Geographic Mapping
- Designing Dashboards

## Business Dashboard Masterclass using Power BI

### Purpose and Target Audience

This course is designed to help your Power BI users build dashboards that are suitable for business use and that are aligned to your corporate design standards. It will leverage existing Power BI knowledge while using a pre-agreed dashboard template specific to your organisation. Attendees should have completed the fundamentals course and/or have used Power BI in practice.

### Duration and Timings

- 0.5 days
- 9am to 1pm or 1pm to 5pm (this is flexible within reason)

### Prerequisites

The prerequisites to attend this course are either of the following:

- Attended Power BI Fundamentals Course (for attendees)
- 6 months of consistent use of Power BI (for attendees)
- Pre-agreed Power BI template (with management team/senior leaders)
- Pre-agreed use of brand colours, font, logos, etc. (with management team/senior leaders)

Price for this course reflects the training delivery and the custom work that will be required in advance of running this course.

### Learning Outcomes

Following completion of the course, attendees will be able to:

- Develop best practice dashboards for use within your organisation
- Use a dashboard template effectively including brand colours, fonts and logos
- Ensure best practices are used when structuring a dashboard for simple editing and resizing in future

### Course Curriculum

- Introduction to Dashboard design for Business use
- Introduction to Dashboard Templates
- Connecting real data to your template
- Preparing the workbook – template to working file
- Adding KPIs
- Adding Other Worksheets
- Dashboard Filters and Actions
- Dashboard Navigation options

## Support following Training Delivery (applicable for any of the above courses)

### Purpose and Target Audience

This is a troubleshooting and advice service for prior attendees to one of our training courses, to enable them to continue self-learning following completion of one of our training courses. It is an annual subscription that is charged per person per technology (e.g. Tableau or Alteryx), as well as an annual flat fee per organisation per technology. Please see pricing document for details on pricing.

Requests will be responded to by an experienced Tableau consultant or trainer. While we cannot promise to always solve your problem, we will always endeavour to give the best advice possible or sign post the user to useful materials.

### Duration and Timings

- Annual subscription
- Response time: within 5 working days
- Service availability: during standard working hours (9am to 5pm) on standard UK working days (not available on weekends or bank holidays)

### Prerequisites

The prerequisites for an individual to use this service:

- Attended one of our training courses
- Queries must be relevant to (i.e. were covered in) the Pasteq Analytics training course that the individual attended

### Scope

- This service is limited to troubleshooting queries and providing advice for topics that are relevant to (i.e. were covered in) the course that was already attended
- Consulting and development are not in scope for this service
- Each user subscription is per technology type (e.g. Tableau or Alteryx).
- Up to 4 queries per person per month

### Learning Outcomes

- Users of this service will be able to gain advice on specific queries or challenges that they are facing that are relevant to a training that has already been attended and delivered by Pasteq Analytics.



## Consulting Services

### About our Consulting Services

Our team has years of experience in delivering data and analytics projects across a range of technologies across the full analytics spectrum. Our favoured technologies are Tableau, Alteryx and Power BI, with a depth experience using them on client projects and for client training.

- Our consulting services exclude all training delivery
- All of consulting services will be delivered by resource(s) at a mutually agreed and appropriate level of experience and skillset.
- Our consulting services will be scoped with the client based on specific requirements, details of which will be outlined clearly in the Call off contract.
- Consulting services can be delivered virtually, in-person, or a mix of both, based on requirements of the client
- It will be agreed with the client whether Pasteq Analytics or client hardware and software will be used.
- Consulting services could cover a multitude of areas based on requirements of the client.
  - This could be across one or more technologies, such as Tableau, Alteryx, Power BI or Excel (this list is non-exclusive and non-exhaustive), for example.
  - This could be across multiple service types. See following sections for examples.
- The SFIA rate card will be used to determine pricing based on length of consulting services engagement and resource required.

Examples of Data & Analytics consulting service types are below. You can find more information about all of our services on our website: [www.pasteq.co.uk](http://www.pasteq.co.uk).

### Consulting Project (tool agnostic)

For our consulting projects, we will scope the project with the client with a specific deliverable in mind. After initial conversations with leadership to establish project needs and resource, we would typically launch this type of project with initial kick off workshops, followed by requirements gathering workshops for each deliverable. While working on the project, we use agile ways of working to allow us to adapt as requirements change as the project progresses.

We always include a dedicated handover and exit plan to ensure the client and client team comfortable with the solution and will be able to maintain it moving forward, either with our ongoing support or without.

We prefer to work as part of your analytics team, but we are aware this is not always possible, so we are able to deliver deliverables based on independent work if required.

For more details, or to discuss a specific project, please get in touch.

## Enablement Packages and Centre of Excellence formation (tool agnostic)

Our enablement packages are always tailored to client requirements and are wholly dependent on the client's situation. Some organisations will have started their analytics journey and already have a certain level of experience and expertise, whereas others might be brand new to it. At Pasteq Analytics we work with the client to establish short and long-term goals to develop a strategy (if required) and plan an enablement package to meet your needs.

These packages can be any length of time, but are typically between 1 and 6 months.

An enablement package, or formation of an Analytics Centre of Excellence (CoE), will typically look to:

- **Centralise tasks and processes related to data and analytics** - this can be organisation wide, department wide, team wide or otherwise, depending on your set up and requirements
- **Develop and document processes** – ensure processes are documented, shared and accessible by the team, such as development, Quality Assurance, Knowledge sharing, software upgrades etc. processes.
- **Create an analytics community** – often overlooked, but crucial in the success of an analytics team. Creation of a community doesn't happen without conscious effort. We work to create voluntary leadership roles, fun activities and team collaboration to ensure there is a safe and friendly atmosphere to develop analytics skills and deliver high quality work.
- **Develop in-house skills** – we provide a wide range of training courses (see training course listings and relevant Service Definition documents). These can be delivered as part of an Enablement package or as stand-alone courses.
- **Create skills development plan** – having a personal development plan for your employees and a clear road map of how these development points will be achieved is key to growing capability within your team to keep up with demand from the business, and also plays a crucial role in staff retention.
- **Improve governance and documentation** – using data and analytics introduces risk, especially when using sensitive or personal data. Applying governance and documentation around it is critical in ensuring everyone is aware of how to use data safely and securely within your organisation.

For more details, or to discuss a specific enablement project, please get in touch.

## Consulting Support (tool agnostic)

For this type of service we agree a set number of days of support with the client to be used over an agreed timeframe (e.g. 24 days of support to be used over a specified 12-month period). These would be used on a time and materials basis and billed as used.

This type of support could be used to maintain an existing solution or software platform, or to continue to maintain a solution that we have delivered as part of a consulting project or enablement project with the client, for example.

The scope for the type of work used for these support days will be mutually agreed, which will also determine the rates used from the SFIA rate card.

## Workshops (tool agnostic)

Workshops are often an element of the other consulting service types we provide (such as a Consulting project or an Enablement package), however, if you would benefit from delivery and hosting of a stand alone workshop we are able to provide this as a service. Examples of workshop types include:

- **Scoping and requirements setting workshop** – what scope does this project have and what are the needs of the business and end users
- **Requirements gathering workshop** – what questions should this set of dashboards answer? What are the “*must haves*” and what are the “*nice to haves*”?
- **Dashboard design and wireframing workshop** – how many dashboards are needed to meet our requirements? How will users navigate between each dashboard? What will the user journey be? What will the layout be for this specific dashboard?
- **Dashboard development process workshop** – defining and educating your team on the correct process for developing dashboards, based on requirements of your organisation.
- **Data Strategy workshop** – what is a data strategy and how do you go about creating one for your organisation?
- **Dashboard review workshop** – identifying good and bad elements of typical dashboards, based on your organisation’s requirements and best practices. Reviewing dashboards within your organisation in order to develop and improve them.
- **Tableau/Alteryx Server review workshop** – review existing content on your Server and how it is structured. Review the architecture and performance of your Server.

Workshop **outcomes** are typically working documents (such as a defined set of development requirement for a project) or a process/guidance on how certain activities should be completed (such as a documented dashboard development process) – this sets a clear standard across the organisation for certain tasks.

For more details, or to discuss a specific workshop (including one that is not mentioned above), please get in touch.

## **Data & Analytics Project Support (tool agnostic)**

This type of service is intended if you need senior strategic leadership or oversight over a project that you have in mind or are already running. You may have the technical ability in your analysts and consultants, but would like some strategic direction on planning, scoping, shaping and delivering the project.

Alternatively, this type of project can be delivered following completion of one of our training courses, to submerge the training attendees in a project environment in order to utilise new skills and embed new practices.

This type of service would include a senior member of our team leading and working with your team. Regular team contact would comprise of meetings such as daily stand ups and weekly meetings, tracking task progress and monitoring quality of deliverables.

For more details, or to discuss a specific project, please get in touch.