Tableau Pulse: Introduction to AI-Driven Data Monitoring

Course Number: TABPLS-AI-DATAMON

Duration: 1 days

Course Description

Staying ahead of the data analytics curve requires more than just reacting to data; it requires being proactive and informed in real-time. This Tableau Pulse training course teaches learners how to access real-time insights and analytics to drive business success. Learners discover how to define business metrics, configure alerts and thresholds, and deliver personalized notifications via Slack, Teams, or email, empowering teams to make informed decisions.

Skills Gained

- Understand the purpose and value of Tableau Pulse in delivering real-time, AI-enhanced metric insights that drive proactive decision-making
- Learn key terminology such as metrics, thresholds, channels, and metric layer to navigate Tableau Pulse with confidence
- Navigate the Tableau Pulse interface to define and monitor KPIs effectively, ensuring you stay on top of critical business metrics
- Create and configure metrics from existing data in Tableau Cloud or CRM Analytics, tailoring insights to your specific needs
- Set up thresholds and smart alerts that notify users when metrics deviate from expectations, enabling timely action
- Deliver insights via Slack, Microsoft Teams, and email to drive awareness and action, ensuring stakeholders are always informed

- Explore AI-generated summaries and contextual explanations for metric changes, making data insights more accessible and actionable
- Apply best practices for user adoption, access control, and alert design across teams, fostering a culture of data-driven decision-making

Technical requirements and prerequisites

- Tableau Cloud account with access to Tableau Pulse
- ? Must have Viewer, Explorer, or Creator license assigned
- ? Must have Pulse feature enabled by your Tableau Cloud admin
- Reliable internet connection for cloud-based hands-on labs
- Access to Slack, Microsoft Teams, or email account
- ? Required to test real-time Pulse alerts and delivery workflows
- Modern web browser (Chrome, Edge, Firefox)
- ? Tableau Pulse is fully browser-based

Materials

All students will receive slides with lecture material and data and labs.

Course Details

Introduction to Tableau Pulse

What is Tableau Pulse and How Does It Work?

- Discover how Tableau Pulse leverages AI to provide real-time insights and proactive analytics

The Role of Pulse in AI-Driven, Proactive Analytics

- Learn how Tableau Pulse fits into the broader analytics landscape and enhances decision-making

Where Tableau Pulse Fits in the Tableau Ecosystem

- Understand the integration of Tableau Pulse within the Tableau ecosystem for seamless data management

Who Benefits from Using Tableau Pulse

- Identify the key stakeholders who can benefit from Tableau Pulse, from data analysts to business leaders

Getting Started with Tableau Pulse

Enabling and Accessing Tableau Pulse in Tableau Cloud

- Step-by-step guide to enabling and accessing Tableau Pulse in your Tableau Cloud environment

Understanding the Metric Layer: Definitions vs. Metrics

- Learn the difference between metric definitions and metrics to effectively manage your data

How Tableau Pulse Uses Data from Tableau Cloud and CRM Analytics

- Explore how Tableau Pulse integrates with Tableau Cloud and CRM Analytics for comprehensive data insights

Overview of the User Interface and Navigation

- Get familiar with the Tableau Pulse interface and navigation tools for efficient use

Defining and Managing Metrics

Selecting Business-Critical Metrics to Monitor

- Identify and select the most critical business metrics to monitor for optimal performance

Creating Basic Metric Definitions

- Learn how to create basic metric definitions to start monitoring your key metrics

Setting Thresholds and Alert Logic

- Configure thresholds and alert logic to ensure you are notified when metrics deviate from expectations

Creating Advanced Metrics with Dimensions and Filters

- Enhance your metrics with dimensions and filters for more detailed and specific insights

Reviewing and Managing Your Metrics Library

- Organize and manage your metrics library for easy access and updates

Delivering Smart Insights

Configuring Alert Channels: Slack, Microsoft Teams, Email

- Set up alert channels to deliver notifications via Slack, Microsoft Teams, and email

Understanding and Customizing AI-Generated Summaries

- Learn how to interpret and customize AI-generated summaries for clearer insights

Using Subscriptions and Notifications to Stay Informed

- Utilize subscriptions and notifications to stay informed about metric changes in real-time

Exploring Metric Changes with Contextual Insights

- Gain contextual insights into metric changes to understand the underlying factors

Best Practices and Hands-On Exercises

Best Practices for Designing Metrics That Matter

- Discover best practices for creating metrics that drive meaningful insights and actions

Hands-On: Create and Configure a Metric from a Published Data Source

- Step-by-step exercise to create and configure a metric from an existing data source

Hands-On: Set Thresholds and Deliver Alerts Across Multiple Channels

- Practical exercise to set thresholds and deliver alerts across different communication channels

Hands-On: Interpreting and Communicating AI-Generated Summaries

- Learn how to interpret and communicate AI-generated summaries effectively

Governance and Adoption Tips: Rollout Strategies for Teams

- Strategies for successful rollout and adoption of Tableau Pulse within your team or organization

Wrap-Up and Next Steps

Summary of Key Takeaways

- Recap of the key points and takeaways from the workshop

Common Use Cases and Real-World Applications

- Explore common use cases and real-world applications of Tableau Pulse

Additional Resources and Continued Learning Paths

- Access to additional resources and continued learning paths to further your skills