

USING APPLY AND OK

When we create a new calculated field inside of Tableau, we will be getting two options in the bottom of dialog box

Apply and OK

Clicking on **Apply** button commits the changes into the Data pane

Clicking on **OK** button closes the current dialog box

OK button does both **Apply and Close operation**

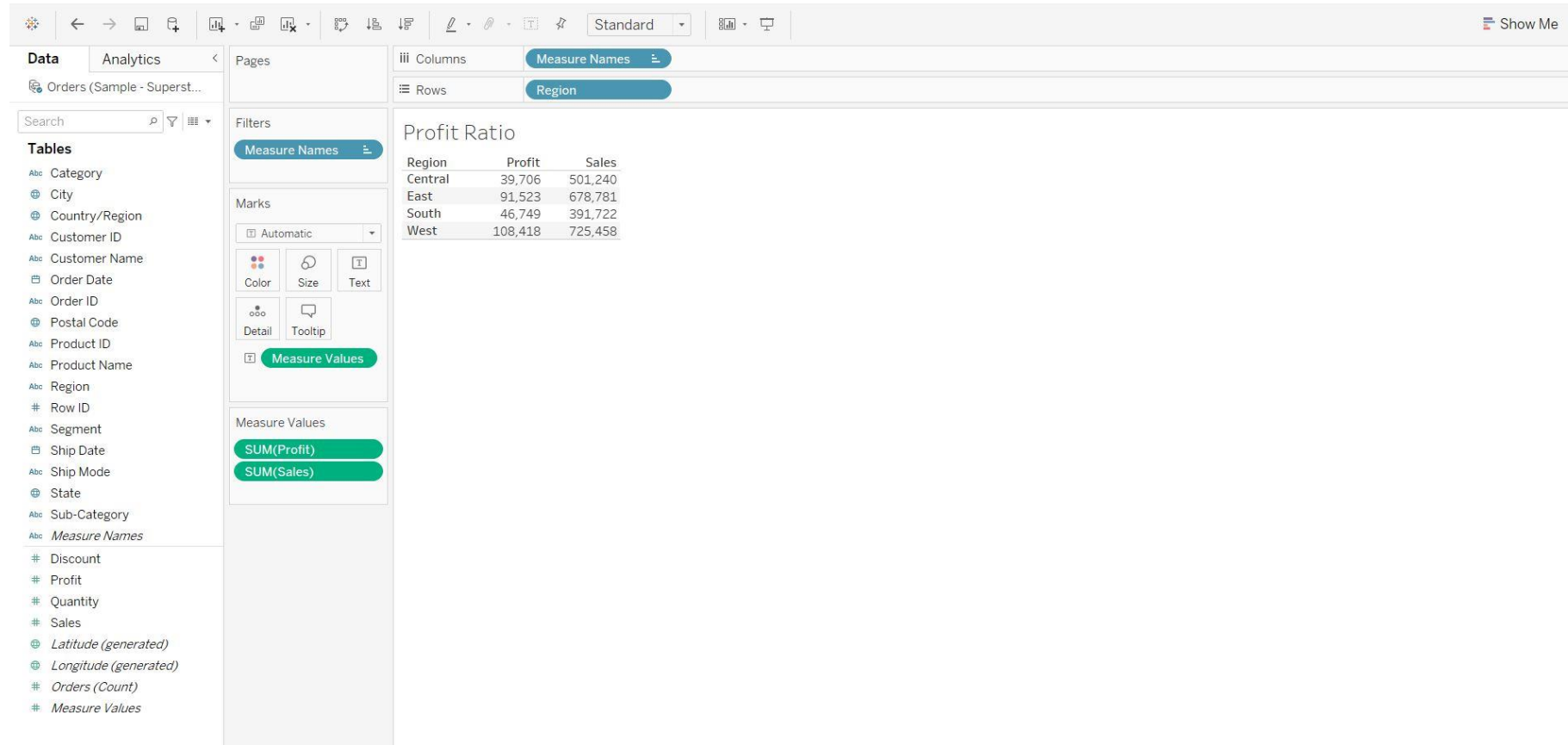
Once we click Apply button, we can continue working on the view by moving the newly created calculated field into the Measure Values shelf

e.g.: Profit Ratio

We can do all this despite the Calculation Editor box being open

STEPS TO MAKE USE OF APPLY AND OK

Step 1: Consider we have the below mentioned Viz
Region with Profit and Sales



STEPS TO MAKE USE OF APPLY AND OK

Step 2: Create Calculated Field

The screenshot shows the Tableau Desktop interface. The 'Data' pane on the left is open, displaying a list of fields. The 'Create Calculated Field...' option is highlighted in the menu. The 'Columns' shelf contains 'Measure Names' and the 'Rows' shelf contains 'Region'. The 'Marks' shelf is set to 'Automatic'. The 'Filters' shelf is empty. The 'Measure Values' shelf contains 'SUM(Profit)' and 'SUM(Sales)'. The main view displays a table titled 'Profit Ratio' with columns for Region, Profit, and Sales.

Region	Profit	Sales
Central	39,706	501,240
East	91,523	678,781
South	46,749	391,722
West	108,418	725,458

STEPS TO MAKE USE OF APPLY AND OK

Step 3: Enter the required formula in Calculation Editor

Observe that there are no fields in Measures section of Data pane

Click on **Apply**

The screenshot shows the Tableau interface with the 'Data' pane on the left, the 'Columns' shelf containing 'Measure Names', and the 'Rows' shelf containing 'Region'. The 'Marks' shelf is set to 'Automatic'. The 'Measure Values' section shows 'SUM(Profit)' and 'SUM(Sales)'. The 'Profit Ratio' calculation is entered in the 'Columns' shelf. A dialog box is open, showing the formula `SUM([Profit])/SUM([Sales])` and the message 'The calculation is valid.' with 'Apply' and 'OK' buttons.

Data Analytics <

Orders (Sample - Superst...)

Search

Tables

- Category
- City
- Country/Region
- Customer ID
- Customer Name
- Order Date
- Order ID
- Postal Code
- Product ID
- Product Name
- Region
- Row ID
- Segment
- Ship Date
- Ship Mode
- State
- Sub-Category
- Measure Names
- Discount
- Profit
- Quantity
- Sales
- Latitude (generated)
- Longitude (generated)
- Orders (Count)
- Measure Values

Columns Measure Names

Rows Region

Filters Measure Names

Marks Automatic

Color Size Text

Detail Tooltip

Measure Values

- SUM(Profit)
- SUM(Sales)

Profit Ratio

Region	Profit	Sales
Central	39,706	501,240
East	91,523	678,781
South	46,749	391,722
West	108,418	725,458

Profit Ratio

`SUM([Profit])/SUM([Sales])`

The calculation is valid.

Apply OK

Apply (Ctrl+Enter)

STEPS TO MAKE USE OF APPLY AND OK

Step 4: The newly created **Profit Ratio** is now present in Measures

The screenshot shows the Power BI Desktop interface. On the left, the 'Data' pane displays a list of tables and measures. The 'Measures' section at the bottom includes 'Profit Ratio', which is highlighted in green. The main workspace shows a table titled 'Profit Ratio' with columns for Region, Profit, and Sales. The data is as follows:

Region	Profit	Sales
Central	39,706	501,240
East	91,523	678,781
South	46,749	391,722
West	108,418	725,458

Below the table, a confirmation dialog box is open, titled 'Profit Ratio'. It contains the DAX formula `SUM([Profit])/SUM([Sales])` and a message stating 'The calculation is valid.' at the bottom. The dialog has 'Apply' and 'OK' buttons.

STEPS TO MAKE USE OF APPLY AND OK

Step 5: Drag the Profit Ratio to the Measure Values shelf

The screenshot shows the Tableau Desktop interface. The 'Columns' shelf contains 'Measure Names' and the 'Rows' shelf contains 'Region'. The 'Marks' shelf is set to 'Automatic'. The 'Measure Values' shelf is empty. A dialog box titled 'Profit Ratio' is open, showing the formula $SUM([Profit]) / SUM([Sales])$. The dialog box has 'Apply' and 'OK' buttons.

Data | Analytics | Pages

Orders (Sample - Superst...

Search

Tables

- Category
- City
- Country/Region
- Customer ID
- Customer Name
- Order Date
- Order ID
- Postal Code
- Product ID
- Product Name
- Region
- Row ID
- Segment
- Ship Date
- Ship Mode
- State
- Sub-Category
- Measure Names
- Discount
- Profit
- Profit Ratio
- Quantity
- Sales
- Latitude (generated)
- Longitude (generated)
- Orders (Count)
- Measure Values

Filters

Measure Names

Marks

Automatic

Color Size Text

Detail Tooltip

Measure Values

SUM(Profit)

SUM(Sales)

AGG(Profit Ratio)

Profit Ratio

Region	Profit	Sales
Central	39,706	501,240
East	91,523	678,781
South	46,749	391,722
West	108,418	725,458

Profit Ratio

$SUM([Profit]) / SUM([Sales])$

The calculation is valid.

Apply OK

The screenshot shows the Tableau Desktop interface after the 'Profit Ratio' measure has been added to the 'Measure Values' shelf. The 'Columns' shelf contains 'Measure Names' and the 'Rows' shelf contains 'Region'. The 'Marks' shelf is set to 'Automatic'. The 'Measure Values' shelf now contains 'SUM(Profit)', 'SUM(Sales)', and 'AGG(Profit Ratio)'. A dialog box titled 'Profit Ratio' is open, showing the formula $SUM([Profit]) / SUM([Sales])$. The dialog box has 'Apply' and 'OK' buttons.

Data | Analytics | Pages

Orders (Sample - Superst...

Search

Tables

- Category
- City
- Country/Region
- Customer ID
- Customer Name
- Order Date
- Order ID
- Postal Code
- Product ID
- Product Name
- Region
- Row ID
- Segment
- Ship Date
- Ship Mode
- State
- Sub-Category
- Measure Names
- Discount
- Profit
- Profit Ratio
- Quantity
- Sales
- Latitude (generated)
- Longitude (generated)
- Orders (Count)
- Measure Values

Filters

Measure Names

Marks

Automatic

Color Size Text

Detail Tooltip

Measure Values

SUM(Profit)

SUM(Sales)

AGG(Profit Ratio)

Profit Ratio

Region	Profit	Sales	Profit Ratio
Central	39,706	501,240	0
East	91,523	678,781	0
South	46,749	391,722	0
West	108,418	725,458	0

Profit Ratio

$SUM([Profit]) / SUM([Sales])$

The calculation is valid.

Apply OK

STEPS TO MAKE USE OF APPLY AND OK

Step 6: Right-click Profit Ratio, Format > Pane > Numbers > Percentage

Data | Analytics | Pages

Orders (Sample - Superst...)

Search

Tables

- Category
- City
- Country/Region
- Customer ID
- Customer Name
- Order Date
- Order ID
- Postal Code
- Product ID
- Product Name
- Region
- Row ID
- Segment
- Ship Date
- Ship Mode
- State
- Sub-Category
- Measure Names
- Discount
- Profit
- Profit Ratio
- Quantity
- Sales
- Latitude (generated)
- Longitude (generated)
- Orders (Count)
- Measure Values

Filters

- Measure Names

Marks

- Automatic
- Color
- Size
- Text
- Detail
- Tooltip
- Measure Values

Measure Values

- SUM(Profit)
- SUM(Sales)
- AGG(Profit Ratio)

Profit Ratio

Region	Profit	Sales	Profit Ratio
Central	39,706	501,240	0
East	91,523	678,781	0
South	46,749	391,722	0
West	108,418	725,458	0

Profit Ratio

SUM([Profit])/SUM([Sales])

The calculation is valid.

Apply OK

Format AGG(Profit Ratio)

Axis | Pane

Default

Numbers: 12345600.0...

Format List:

- Automatic
- Number (Standard)
- Number (Custom)
- Currency (Standard)
- Currency (Custom)
- Scientific
- Percentage**
- Custom

Percentage Settings:

Decimal places: 2

Profit Ratio

Region	Profit	Sales	Profit Ratio
Central	39,706	501,240	7.92%
East	91,523	678,781	13.48%
South	46,749	391,722	11.93%
West	108,418	725,458	14.94%

Measure Values

- SUM(Profit)
- SUM(Sales)
- AGG(Profit Ratio)

Profit Ratio

SUM([Profit])/SUM([Sales])

The calculation is valid.

Apply OK

Clear

STEPS TO MAKE USE OF APPLY AND OK

Step 7: Close the **Format AGG(Profit Ratio)** box

The screenshot shows the Qlik Sense interface with the **Format AGG(Profit Ratio)** dialog box open. The dialog box has a **Default** tab and a **Numbers** field set to **12345600.0...**. The **Marks** section shows **Automatic** as the mark type, with **Color**, **Size**, **Text**, **Detail**, and **Tooltip** options. The **Measure Values** section lists **SUM(Profit)**, **SUM(Sales)**, and **AGG(Profit Ratio)**. The **Measure Names** section lists **Measure Names**. The **Columns** section lists **Measure Names** and the **Rows** section lists **Region**. The **Profit Ratio** table is displayed with the following data:

Region	Profit	Sales	Profit Ratio
Central	39,706	501,240	7.92%
East	91,523	678,781	13.48%
South	46,749	391,722	11.93%
West	108,418	725,458	14.94%

The **Profit Ratio** dialog box is also open, showing the formula `SUM([Profit])/SUM([Sales])` and the message "The calculation is valid." with **Apply** and **OK** buttons.

STEPS TO MAKE USE OF APPLY AND OK

Step 8: Click on OK

The screenshot displays a data analytics application interface. On the left, a 'Data' pane lists various fields under 'Tables' and 'Measure Values'. The 'Columns' pane shows 'Measure Names' and 'Region'. The 'Rows' pane is empty. The 'Marks' pane is set to 'Automatic'. The 'Filters' pane is empty. The 'Measure Values' pane shows 'SUM(Profit)', 'SUM(Sales)', and 'AGG(Profit Ratio)'. The main view displays a table titled 'Profit Ratio' with columns 'Region', 'Profit', 'Sales', and 'Profit Ratio'. The table contains data for four regions: Central, East, South, and West. A confirmation dialog box is open, showing the formula $SUM([Profit]) / SUM([Sales])$ and the message 'The calculation is valid.' with 'Apply' and 'OK' buttons. A tooltip 'Apply and Close' is visible over the 'OK' button.

Data | Analytics | Pages | Columns: Measure Names | Rows: Region

Search | Filters: Measure Names | Marks: Automatic | Color | Size | Text | Detail | Tooltip | Measure Values: SUM(Profit), SUM(Sales), AGG(Profit Ratio)

Tables

- Category
- City
- Country/Region
- Customer ID
- Customer Name
- Order Date
- Order ID
- Postal Code
- Product ID
- Product Name
- Region
- Row ID
- Segment
- Ship Date
- Ship Mode
- State
- Sub-Category
- Measure Names

Measure Values

- Discount
- Profit
- Profit Ratio
- Quantity
- Sales
- Latitude (generated)
- Longitude (generated)
- Orders (Count)
- Measure Values

Profit Ratio

Region	Profit	Sales	Profit Ratio
Central	39,706	501,240	7.92%
East	91,523	678,781	13.48%
South	46,749	391,722	11.93%
West	108,418	725,458	14.94%

Profit Ratio

$SUM([Profit]) / SUM([Sales])$

The calculation is valid.

Apply OK

Apply and Close

STEPS TO MAKE USE OF APPLY AND OK

Step 9: Final view

The screenshot displays a data visualization tool interface with the following components:

- Data Source:** Orders (Sample - Superst...)
- Search:** Search
- Tables:** A list of available fields including Category, City, Country/Region, Customer ID, Customer Name, Order Date, Order ID, Postal Code, Product ID, Product Name, Region, Row ID, Segment, Ship Date, Ship Mode, State, Sub-Category, Measure Names, Discount, Profit, Profit Ratio, Quantity, Sales, Latitude (generated), Longitude (generated), Orders (Count), and Measure Values.
- Columns:** Measure Names
- Rows:** Region
- Filters:** Measure Names
- Marks:** Automatic
- Measure Values:** SUM(Profit), SUM(Sales), AGG(Profit Ratio)

The main visualization area displays a table titled "Profit Ratio" with the following data:

Region	Profit	Sales	Profit Ratio
Central	39,706	501,240	7.92%
East	91,523	678,781	13.48%
South	46,749	391,722	11.93%
West	108,418	725,458	14.94%