HOW TO CREATE A CALCULATED FIELD

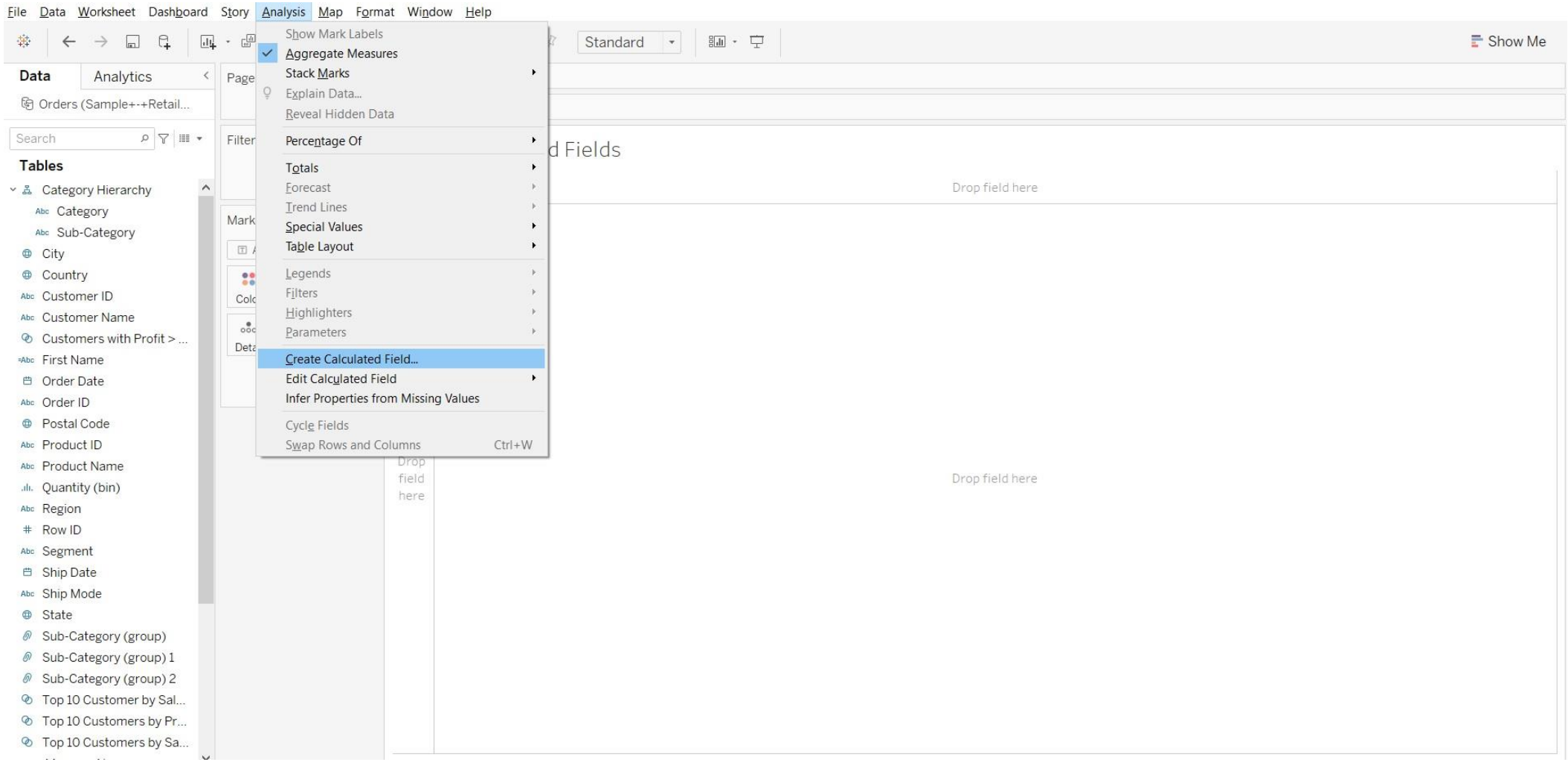
Type I: String Calculated Fields

Type II: Date Calculated Fields

Type III: Arithmetic Fields

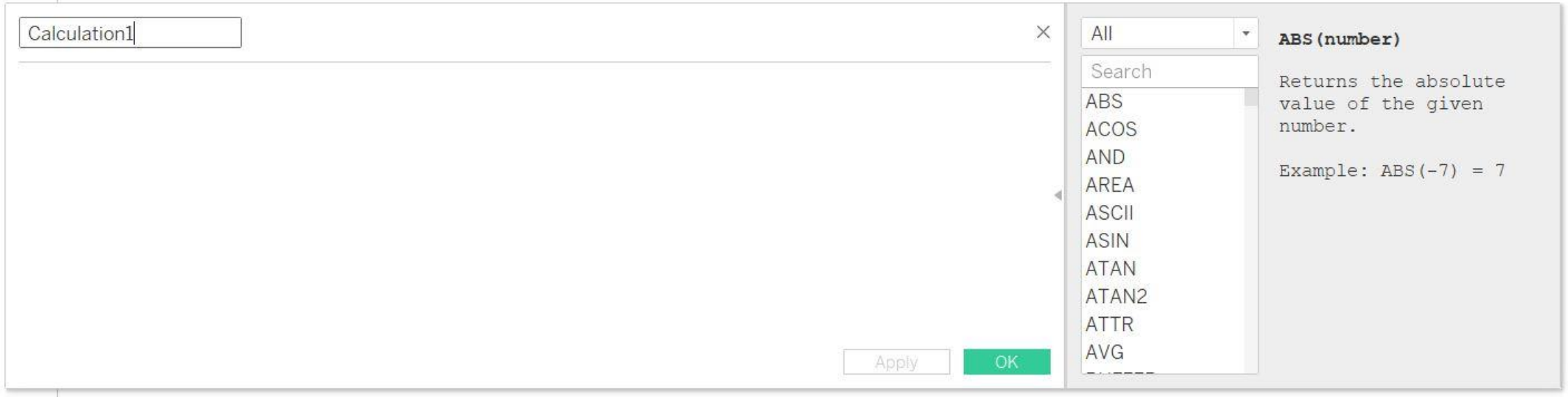
HOW TO CREATE A STRING CALCULATED FIELD

STEP 1: In a worksheet in Tableau, select **Analysis > Create Calculated Field**



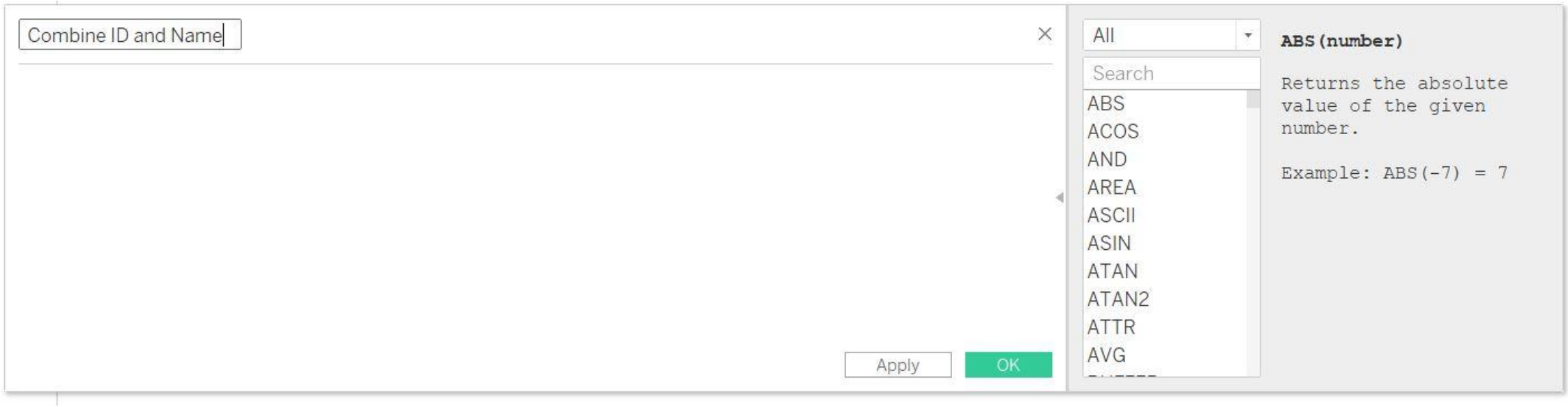
HOW TO CREATE A STRING CALCULATED FIELD

STEP 2: Calculation Editor dialog box will be seen



HOW TO CREATE A STRING CALCULATED FIELD

STEP 3: Give the calculated field a name. e.g.: **Combined ID and Name**



HOW TO CREATE A STRING CALCULATED FIELD

STEP 4: In the Calculation Editor, enter a formula

Formulas use a combination of functions, fields, and operators

The calculation is valid message must be present in bottom left side of the calculation editor

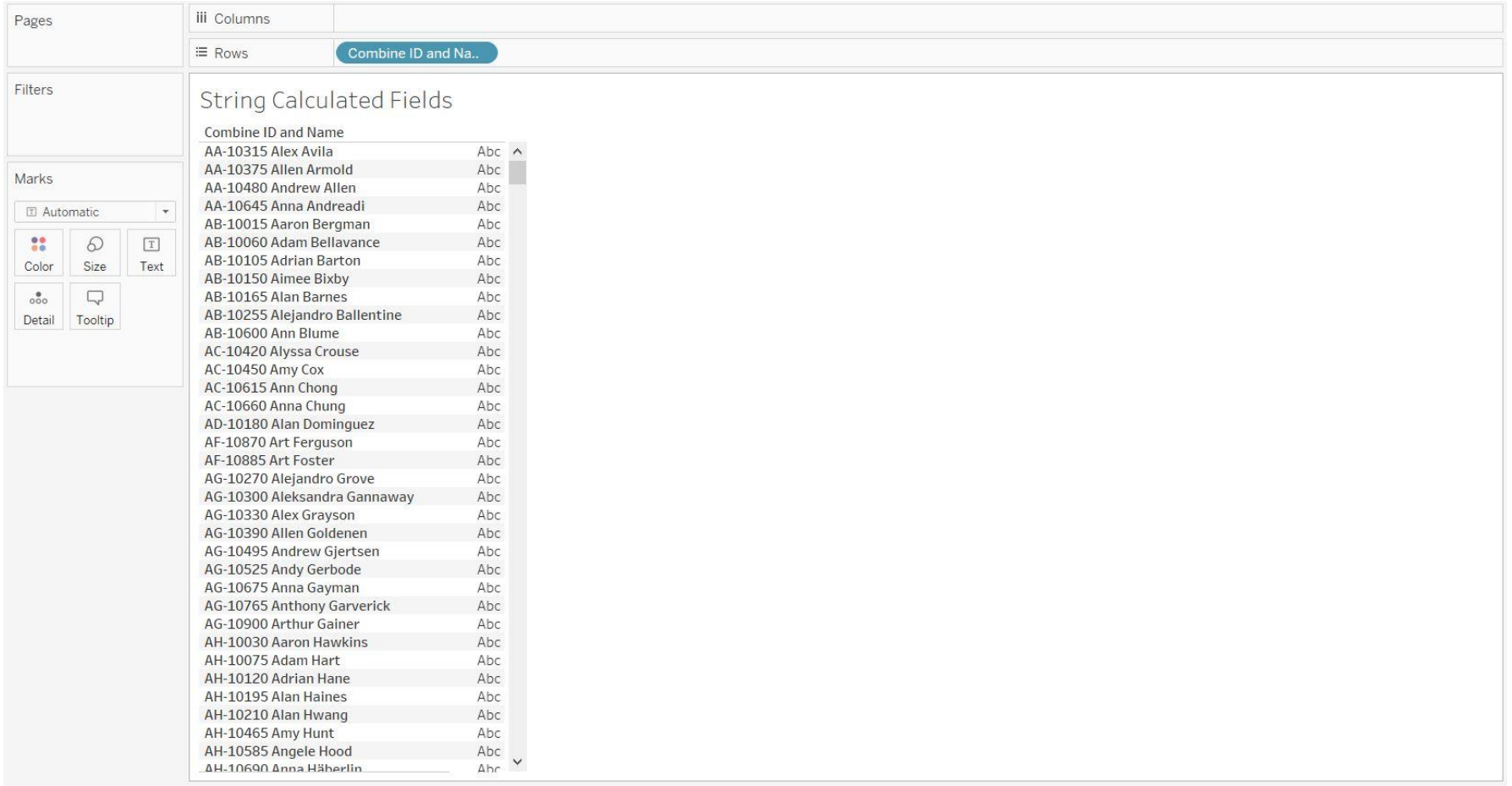
Click **OK**

HOW TO CREATE A STRING CALCULATED FIELD

STEP 5: The newly created Calculated Field must now be present in the **Data** pane
Since the new field computes qualitative data, it is added to **Dimensions**
The calculated field will always start with "="

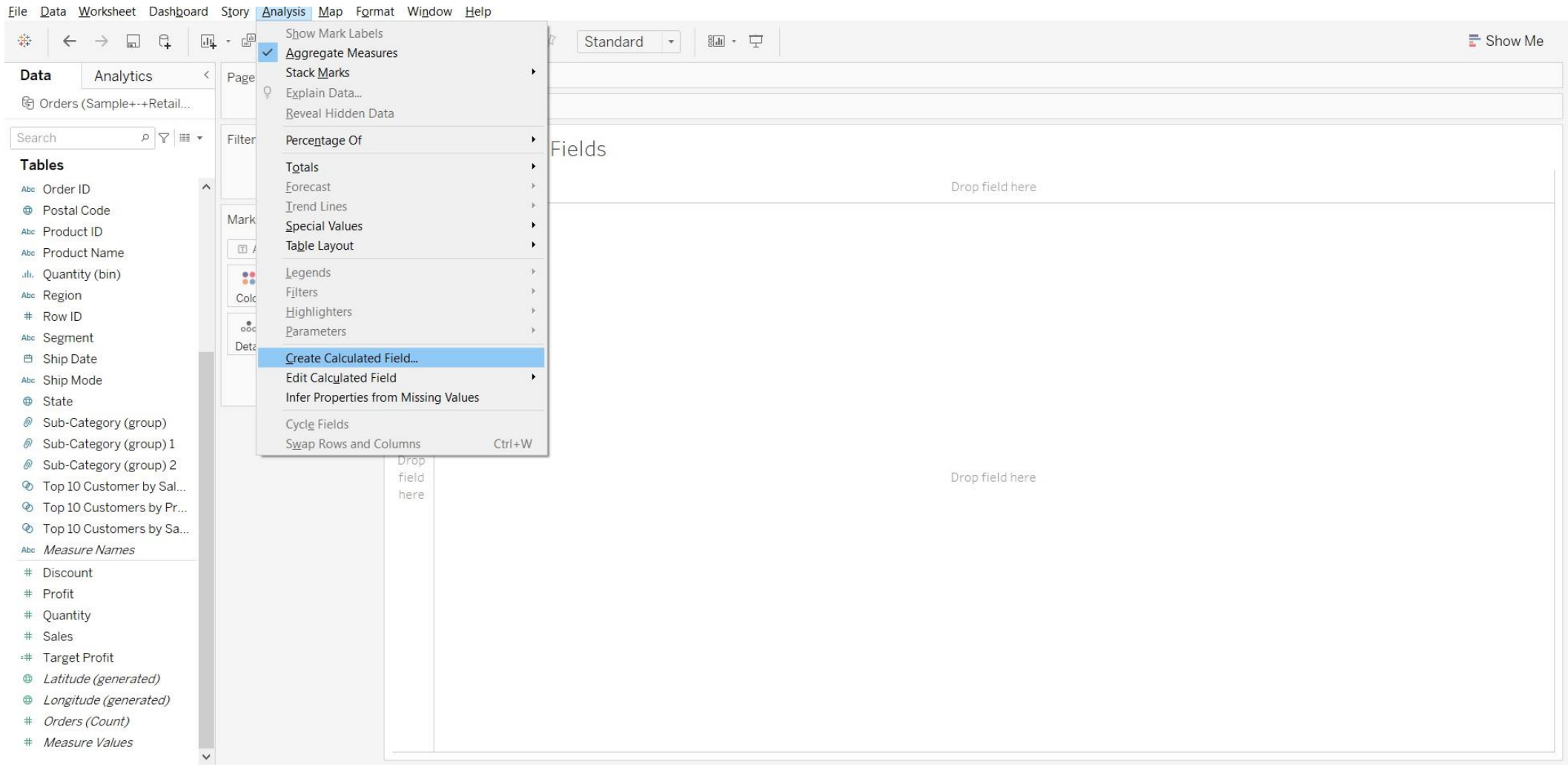
HOW TO CREATE A STRING CALCULATED FIELD

STEP 6: Drag and drop the **Combine ID and Name** field to the **Rows** shelf



HOW TO CREATE A DATE CALCULATED FIELD

STEP 1: In a worksheet in Tableau, select **Analysis > Create Calculated Field**

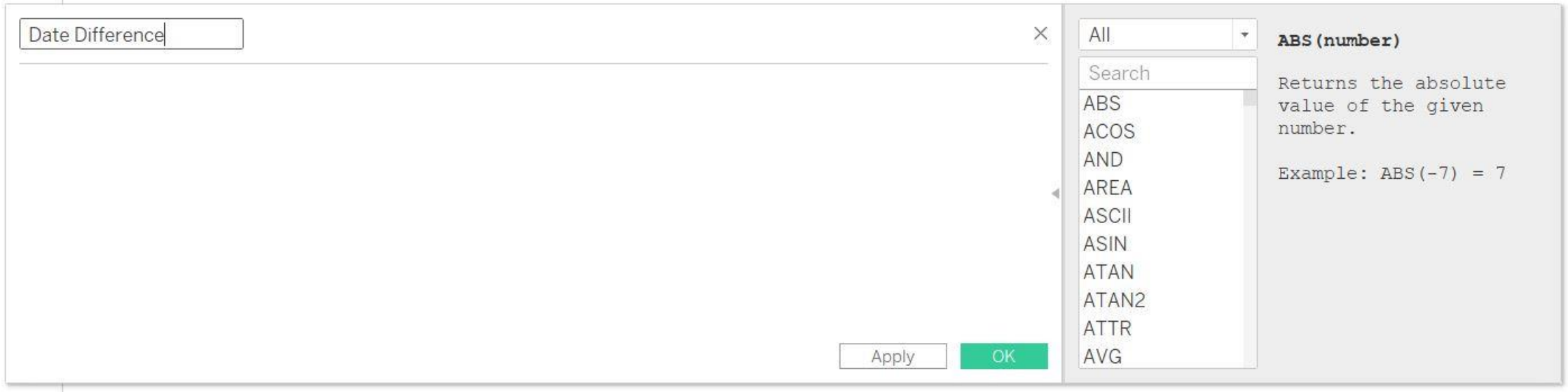


HOW TO CREATE A DATE CALCULATED FIELD

STEP 2: Calculation Editor dialog box will be seen

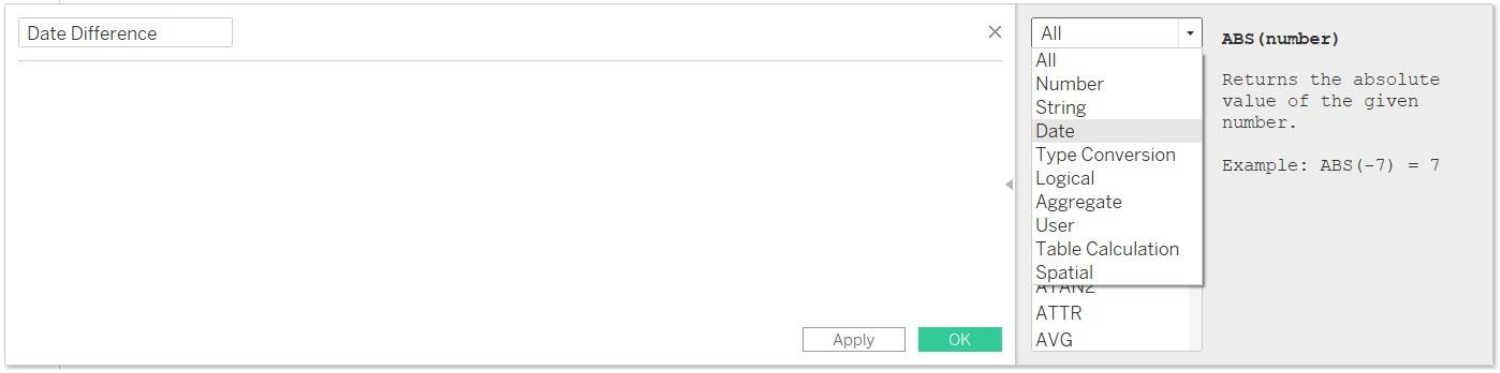
HOW TO CREATE A DATE CALCULATED FIELD

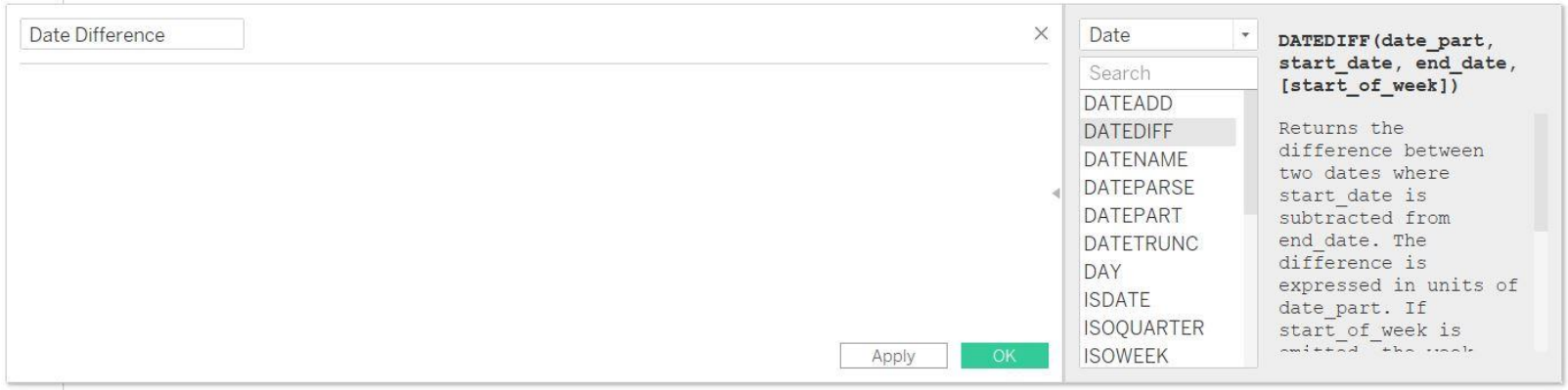
STEP 3: Give the calculated field a name. e.g.: **Date Difference**



HOW TO CREATE A DATE CALCULATED FIELD

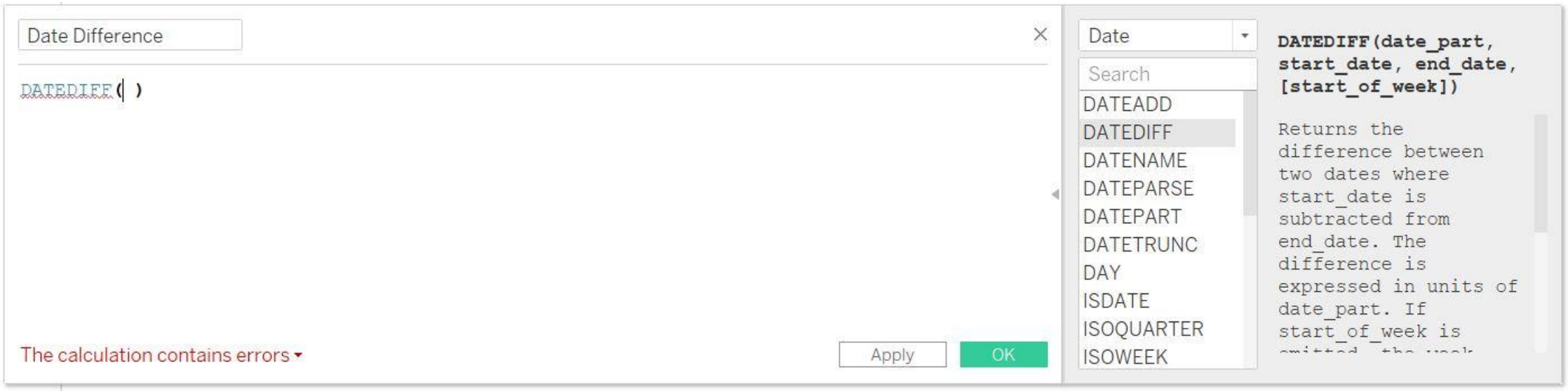
STEP 4: If required select the type of function e.g.: **Date**
Double-click on required function e.g.: **DATEDIFF**





HOW TO CREATE A DATE CALCULATED FIELD

STEP 5: DATEDIFF( ) function will appear in the Calculation Editor



HOW TO CREATE A DATE CALCULATED FIELD

STEP 6: In the Calculation Editor, enter a formula

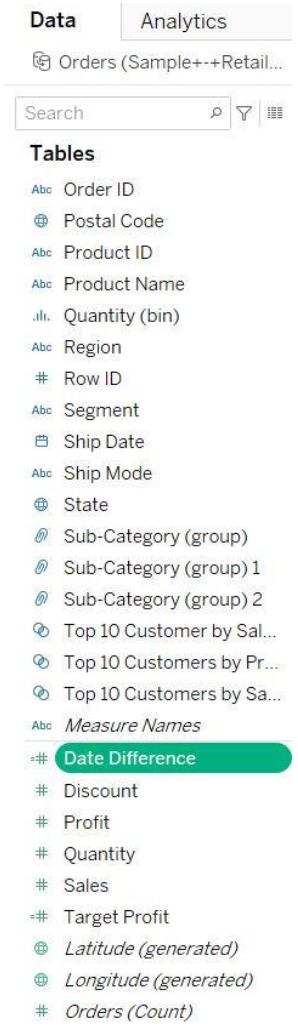
Formulas use a combination of functions, fields, and operators

The calculation is valid message must be present in bottom left side of the calculation editor

Click **OK**

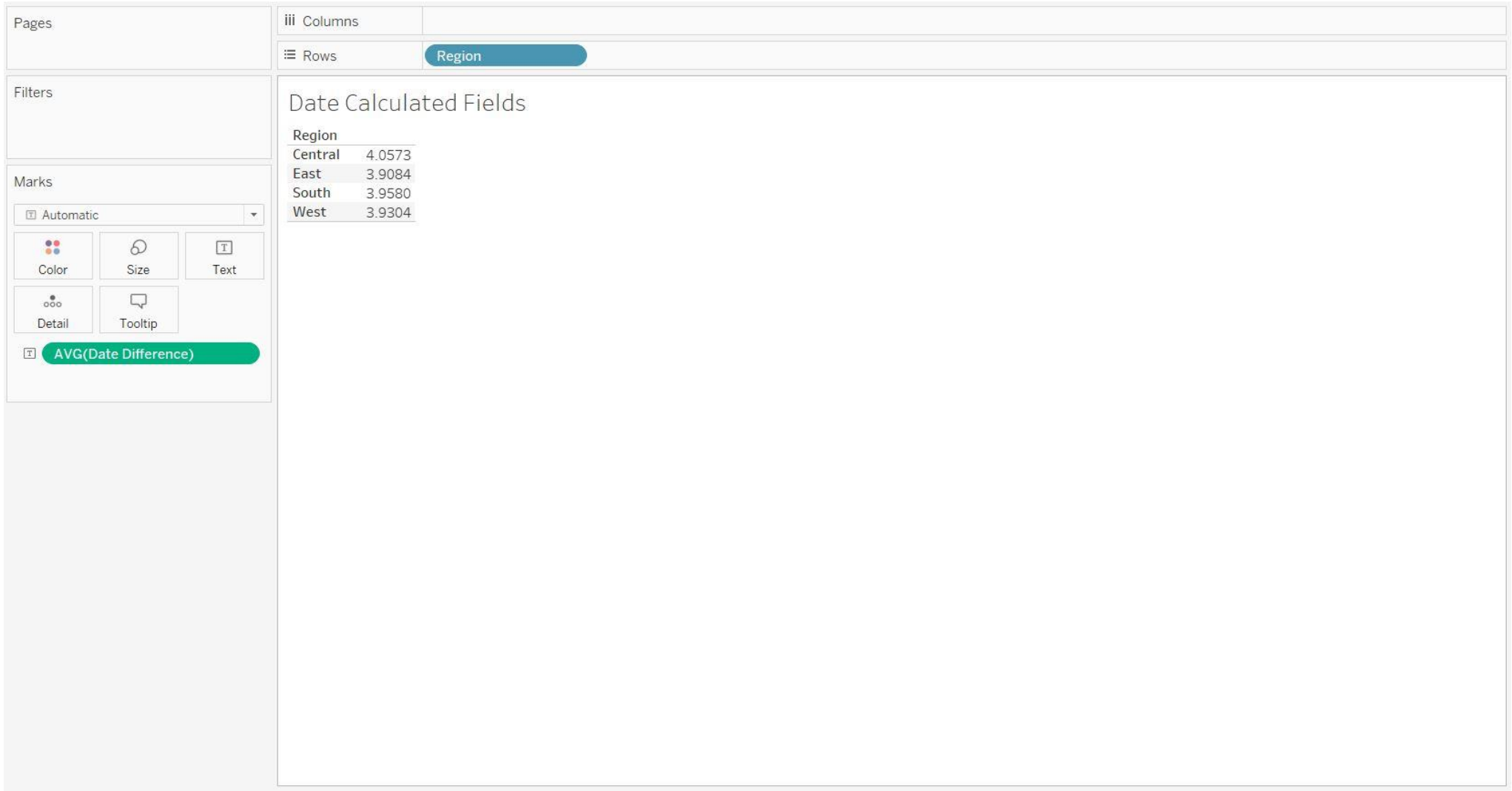
HOW TO CREATE A DATE CALCULATED FIELD

STEP 7: The newly created Calculated Field must now be present in the **Data** pane
Since the new field computes quantitative data, it is added to **Measures**
The calculated field will always start with "="



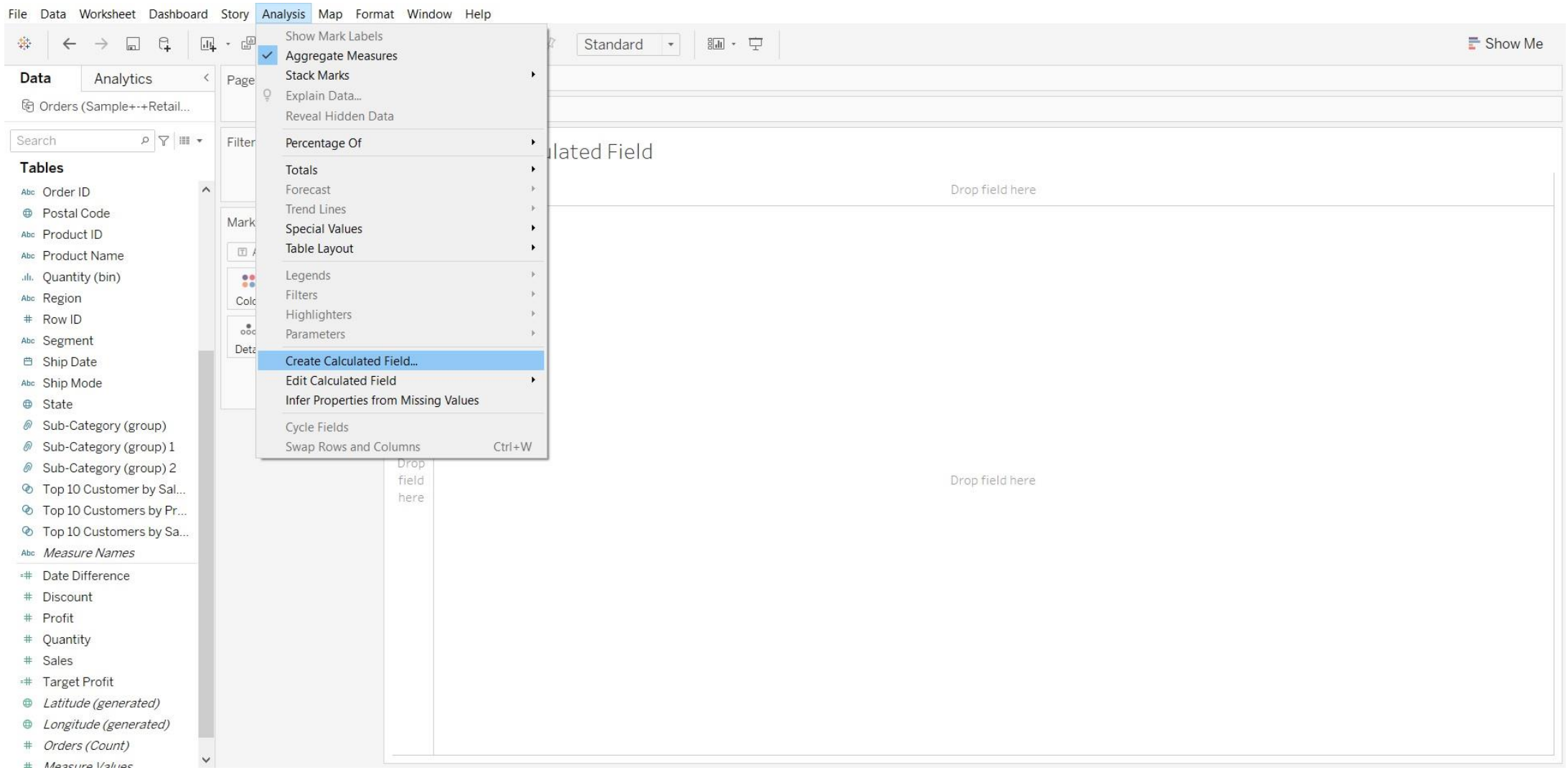
HOW TO CREATE A DATE CALCULATED FIELD

STEP 8: Now the calculated field can be used in the view to find out the Average Date Difference per Region



HOW TO CREATE AN ARITHMETIC DATE CALCULATED FIELD

STEP 1: In a worksheet in Tableau, select **Analysis > Create Calculated Field**

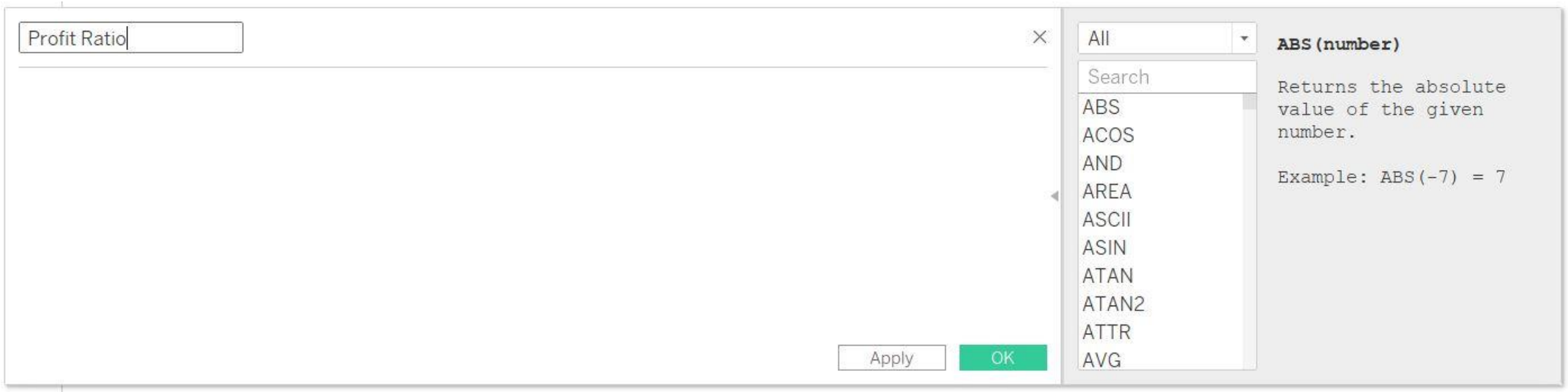


HOW TO CREATE AN ARITHMETIC DATE CALCULATED FIELD

STEP 2: Calculation Editor dialog box will be seen

HOW TO CREATE AN ARITHMETIC DATE CALCULATED FIELD

STEP 3: Give the calculated field a name. e.g.: **Profit Ratio**



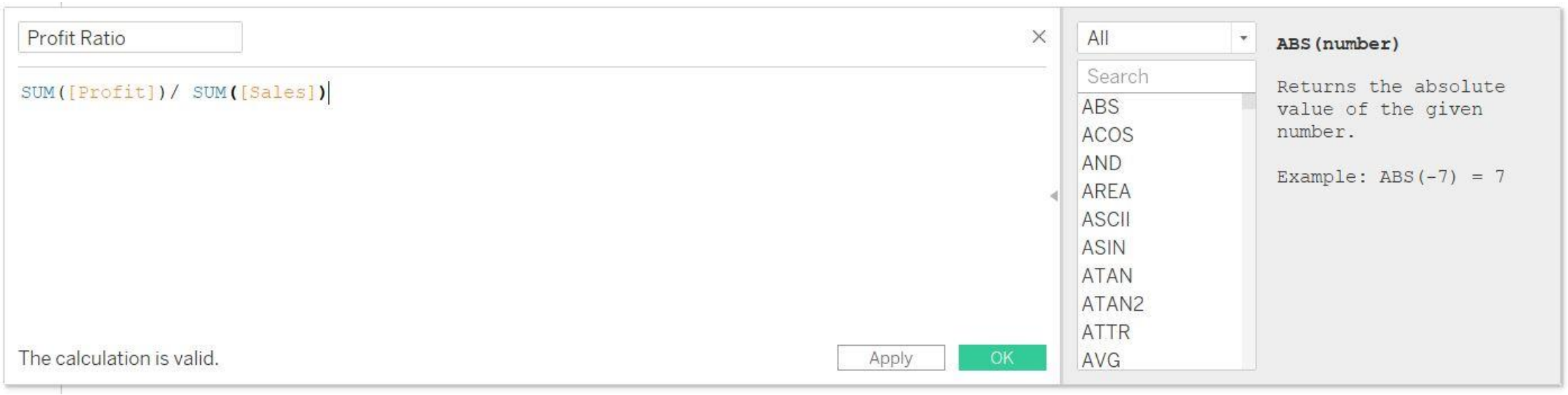
HOW TO CREATE AN ARITHMETIC DATE CALCULATED FIELD

STEP 4: In the Calculation Editor, enter a formula

Formulas use a combination of functions, fields, and operators

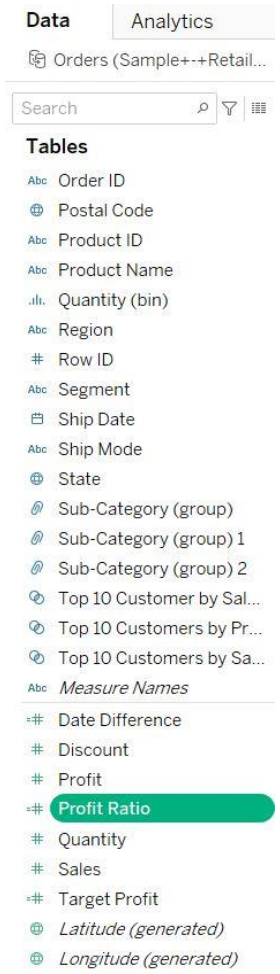
The calculation is valid message must be present in bottom left side of the calculation editor

Click **OK**



HOW TO CREATE AN ARITHMETIC DATE CALCULATED FIELD

STEP 5: The newly created Calculated Field must now be present in the Data pane
Since the new field computes quantitative data, it is added to **Measures**
The calculated field will always start with "="



HOW TO CREATE AN ARITHMETIC DATE CALCULATED FIELD

STEP 6: Now the calculated field can be used in the view to find out the Profit Ratio per Segment

If required, the Profit Ratio can be displayed in % format