

HOW TO CREATE A CALCULATED FIELD

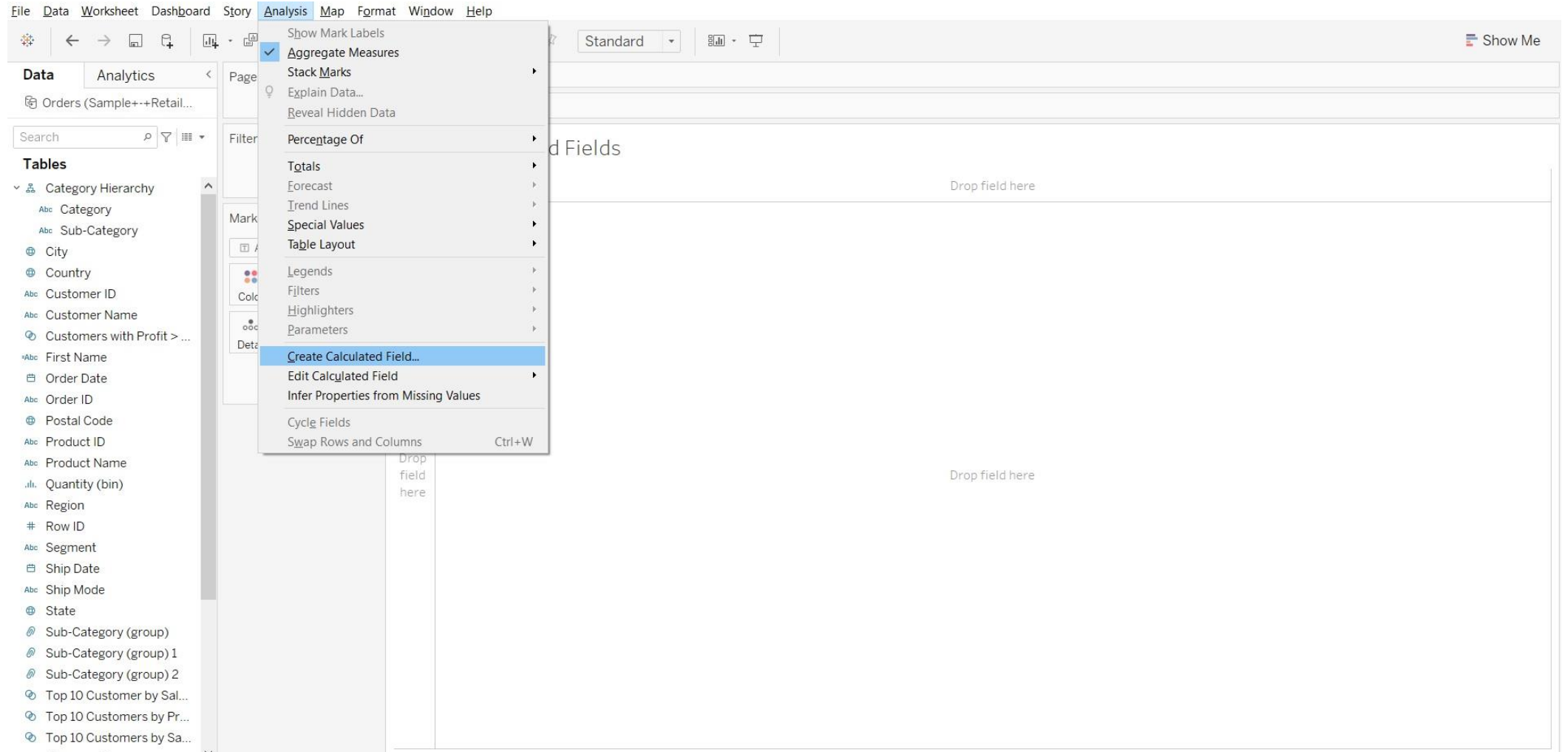
Type I: String Calculated Fields

Type II: Date Calculated Fields

Type III: Arithmetic Fields

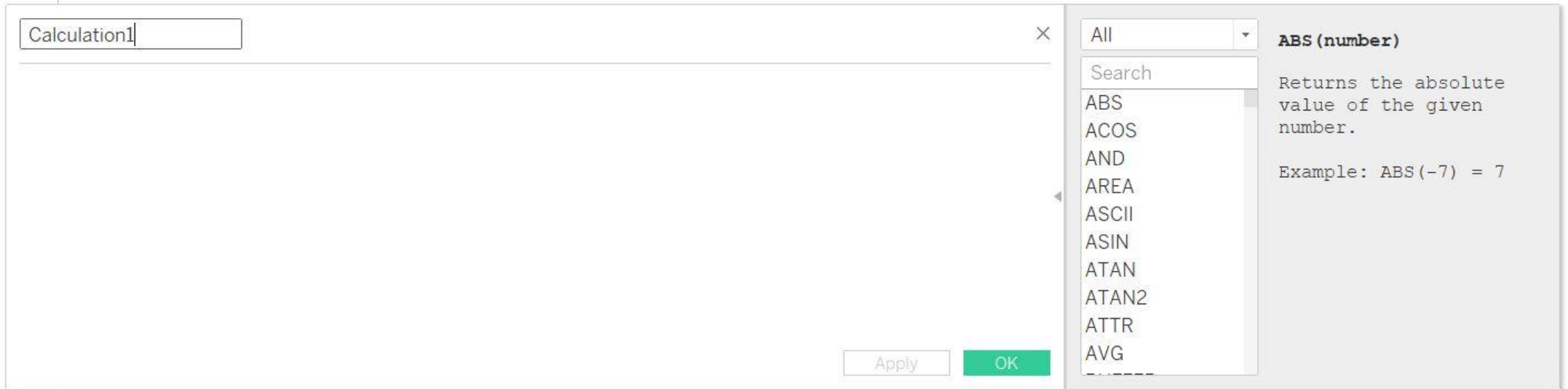
HOW TO CREATE A STRING CALCULATED FIELD

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**

Combine ID and Name

×

All

Search

- ABS
- ACOS
- AND
- AREA
- ASCII
- ASIN
- ATAN
- ATAN2
- ATTR
- AVG

ABS (number)

Returns the absolute value of the given number.

Example: `ABS(-7) = 7`

Apply OK

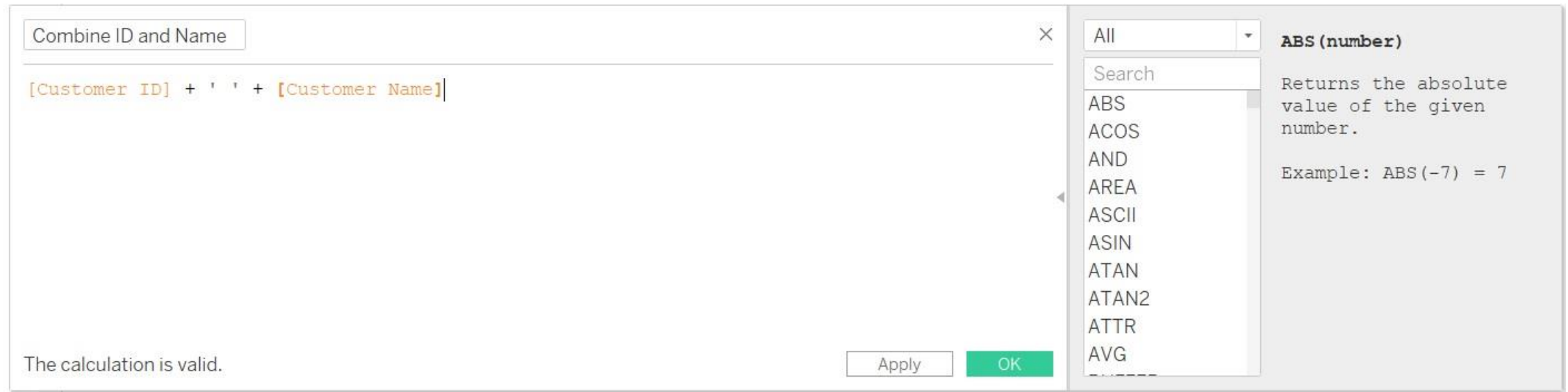
HOW TO CREATE A STRING CALCULATED FIELD

STEP 4: In the Calculation Editor, enter a formula

Formulas use a combination of functions, fields, and operators

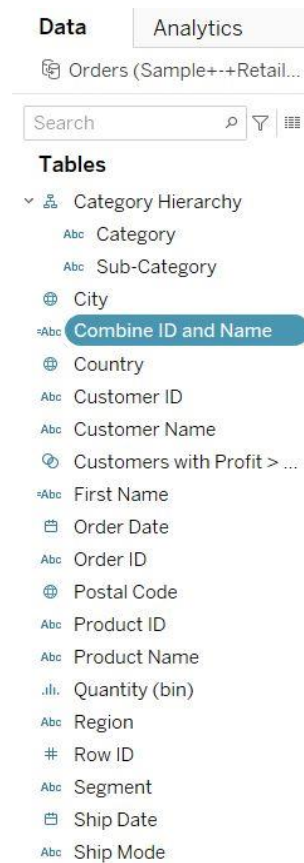
The calculation is valid message must be present in bottom left side of the calculation editor

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

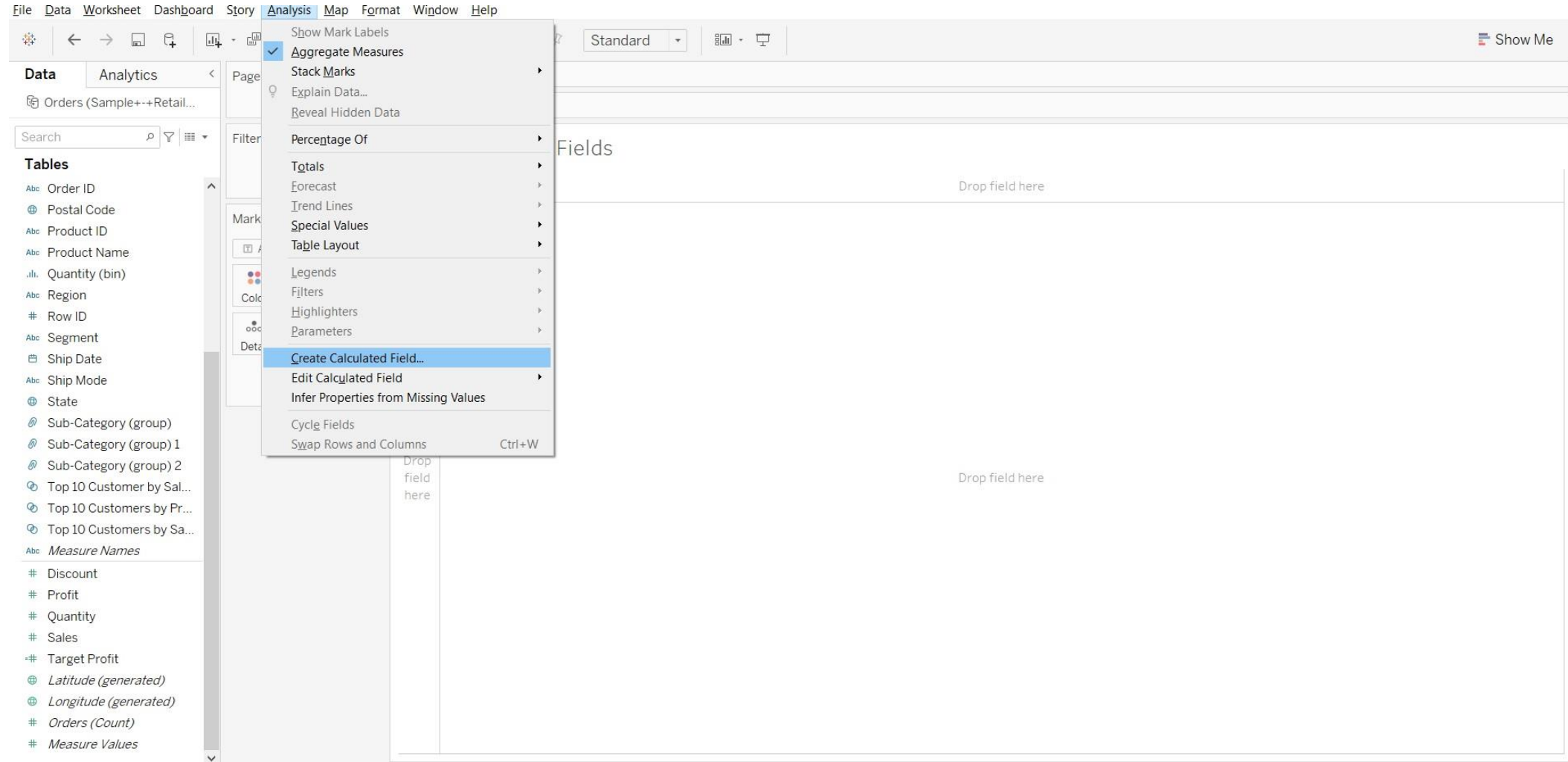
STEP 6: Drag and drop the **Combine ID and Name** field to the **Rows** shelf

The screenshot shows the Tableau interface. On the left, the 'Marks' shelf is set to 'Automatic'. The 'Columns' shelf contains the field 'Combine ID and Na..'. The 'Rows' shelf is empty. The 'String Calculated Fields' list is open, showing a scrollable list of fields. The field 'Combine ID and Name' is selected and highlighted in blue. The list includes various ID and name combinations, such as 'AA-10315 Alex Avila', 'AA-10375 Allen Arnold', 'AA-10480 Andrew Allen', 'AA-10645 Anna Andreadi', 'AB-10015 Aaron Bergman', 'AB-10060 Adam Bellavance', 'AB-10105 Adrian Barton', 'AB-10150 Aimee Bixby', 'AB-10165 Alan Barnes', 'AB-10255 Alejandro Ballentine', 'AB-10600 Ann Blume', 'AC-10420 Alyssa Crouse', 'AC-10450 Amy Cox', 'AC-10615 Ann Chong', 'AC-10660 Anna Chung', 'AD-10180 Alan Dominguez', 'AF-10870 Art Ferguson', 'AF-10885 Art Foster', 'AG-10270 Alejandro Grove', 'AG-10300 Aleksandra Gannaway', 'AG-10330 Alex Grayson', 'AG-10390 Allen Goldenen', 'AG-10495 Andrew Gjertsen', 'AG-10525 Andy Gerbode', 'AG-10675 Anna Gayman', 'AG-10765 Anthony Garverick', 'AG-10900 Arthur Gainer', 'AH-10030 Aaron Hawkins', 'AH-10075 Adam Hart', 'AH-10120 Adrian Hane', 'AH-10195 Alan Haines', 'AH-10210 Alan Hwang', 'AH-10465 Amy Hunt', 'AH-10585 Angele Hood', and 'AH-10690 Anna Häberlin'.

Combine ID and Name	Abc
AA-10315 Alex Avila	Abc
AA-10375 Allen Arnold	Abc
AA-10480 Andrew Allen	Abc
AA-10645 Anna Andreadi	Abc
AB-10015 Aaron Bergman	Abc
AB-10060 Adam Bellavance	Abc
AB-10105 Adrian Barton	Abc
AB-10150 Aimee Bixby	Abc
AB-10165 Alan Barnes	Abc
AB-10255 Alejandro Ballentine	Abc
AB-10600 Ann Blume	Abc
AC-10420 Alyssa Crouse	Abc
AC-10450 Amy Cox	Abc
AC-10615 Ann Chong	Abc
AC-10660 Anna Chung	Abc
AD-10180 Alan Dominguez	Abc
AF-10870 Art Ferguson	Abc
AF-10885 Art Foster	Abc
AG-10270 Alejandro Grove	Abc
AG-10300 Aleksandra Gannaway	Abc
AG-10330 Alex Grayson	Abc
AG-10390 Allen Goldenen	Abc
AG-10495 Andrew Gjertsen	Abc
AG-10525 Andy Gerbode	Abc
AG-10675 Anna Gayman	Abc
AG-10765 Anthony Garverick	Abc
AG-10900 Arthur Gainer	Abc
AH-10030 Aaron Hawkins	Abc
AH-10075 Adam Hart	Abc
AH-10120 Adrian Hane	Abc
AH-10195 Alan Haines	Abc
AH-10210 Alan Hwang	Abc
AH-10465 Amy Hunt	Abc
AH-10585 Angele Hood	Abc
AH-10690 Anna Häberlin	Abc

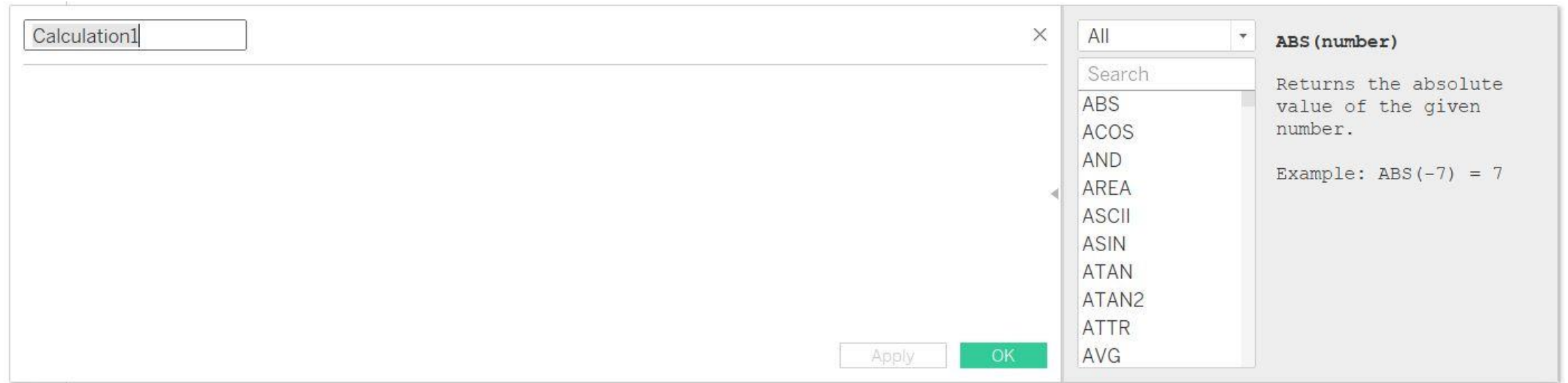
HOW TO CREATE A DATE CALCULATED FIELD

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**

Date Difference

Apply OK

All

Search

- ABS
- ACOS
- AND
- AREA
- ASCII
- ASIN
- ATAN
- ATAN2
- ATTR
- AVG

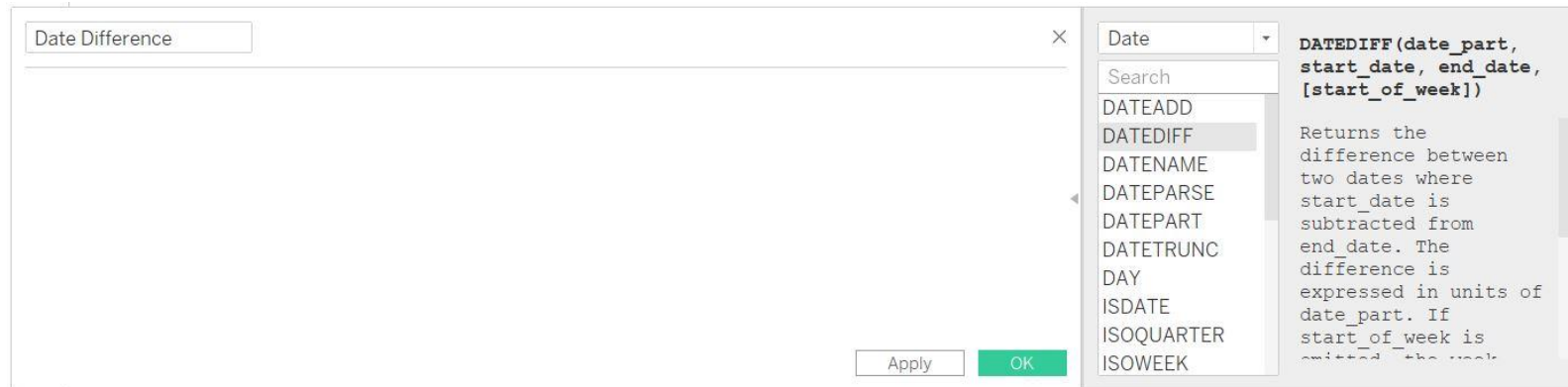
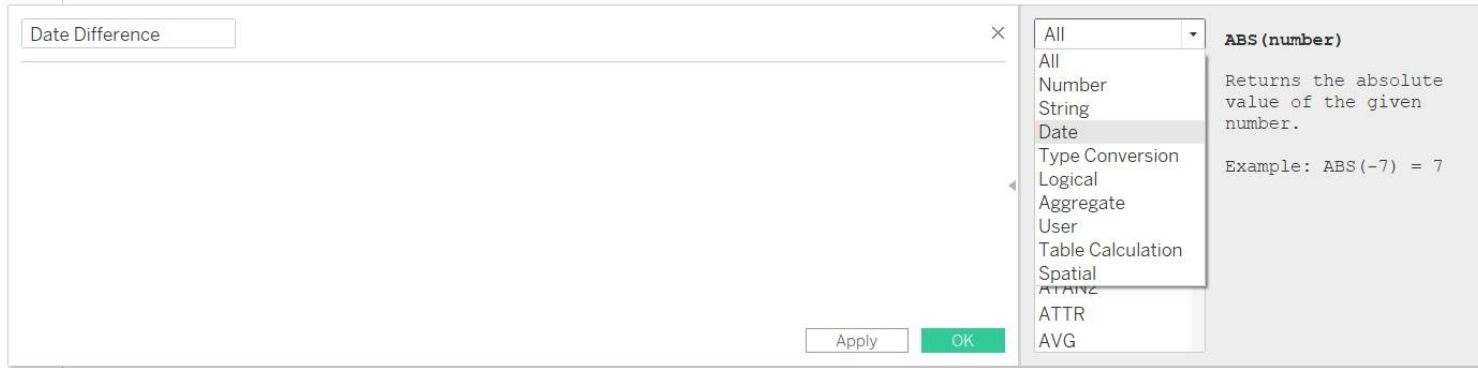
ABS (number)

Returns the absolute value of the given number.

Example: `ABS(-7) = 7`

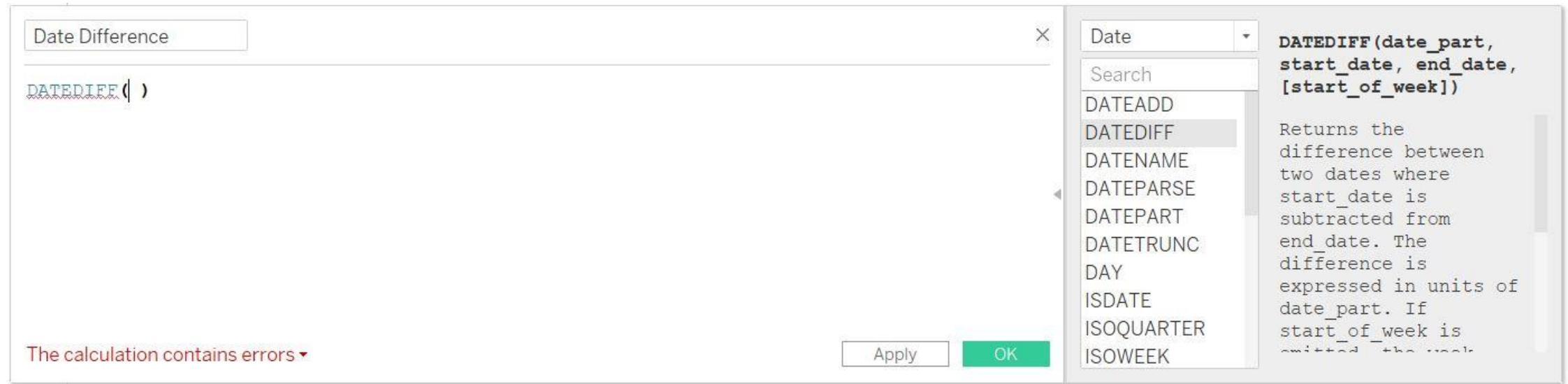
HOW TO CREATE A DATE CALCULATED FIELD

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

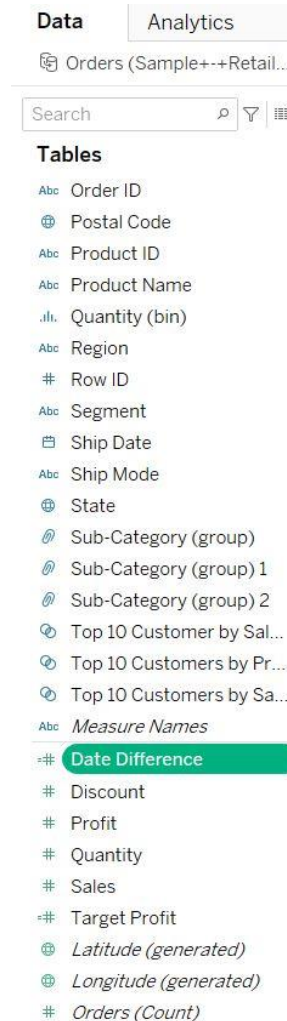
The calculation is valid message must be present in bottom left side of the calculation editor

Click **OK**

The screenshot displays the 'Date Difference' calculation editor. The main text area contains the formula: `DATEDIFF('day', [Order Date], [Ship Date], 'Sunday')`. Below the formula, a status message reads 'The calculation is valid.' To the right of the formula area is a panel with a dropdown menu set to 'Date', a search bar, and a list of date functions including DATEADD, DATEDIFF (which is highlighted), DATENAME, DATEPARSE, DATEPART, DATETRUNC, DAY, ISDATE, ISOQUARTER, and ISOWEEK. Further right, the field name 'Order Date' is shown with its 'Data type: Date'. At the bottom right of this panel is a 'Describe...' button. At the bottom of the editor, there are 'Apply' and 'OK' buttons.

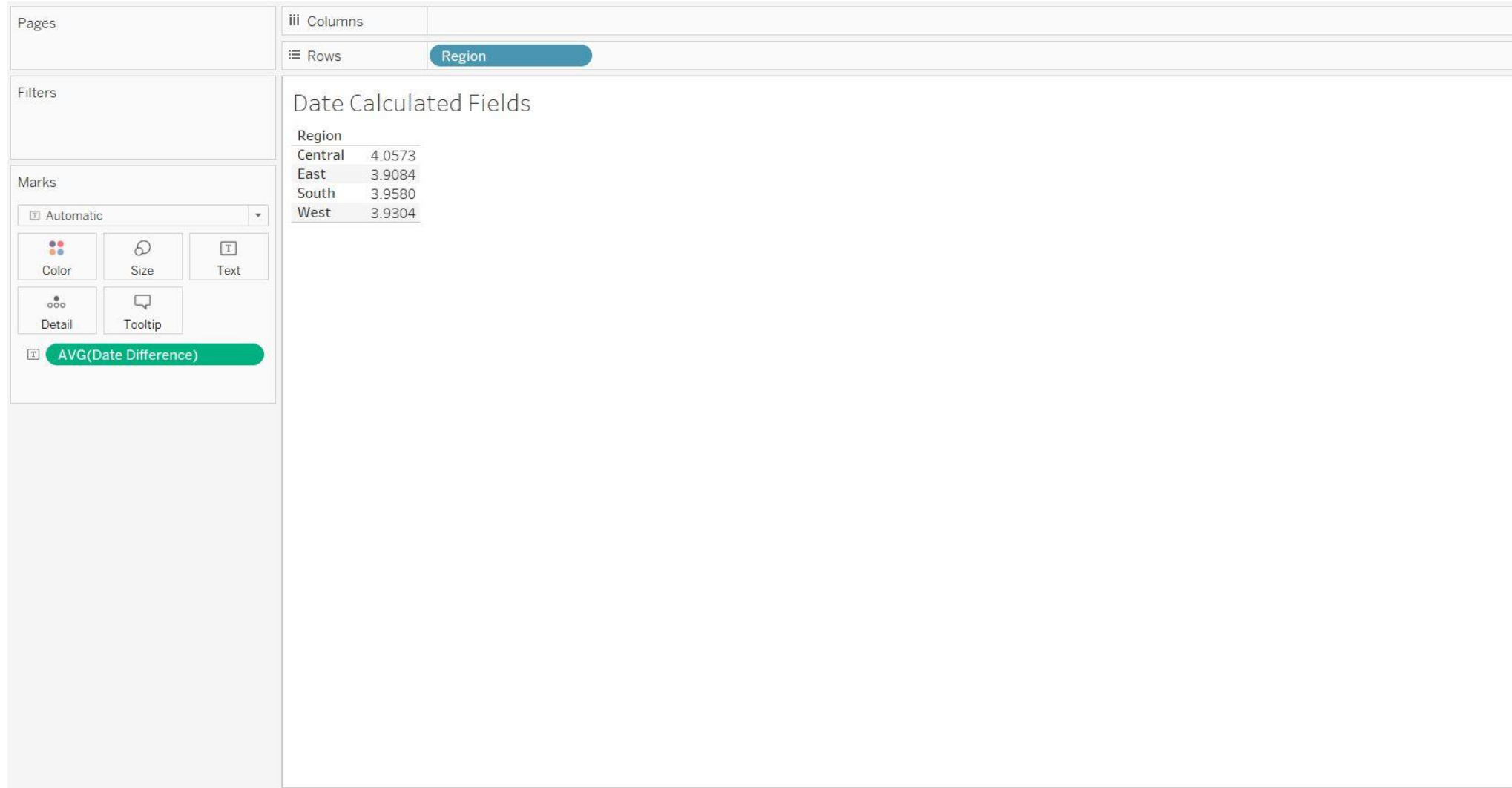
HOW TO CREATE A DATE CALCULATED FIELD

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 "="



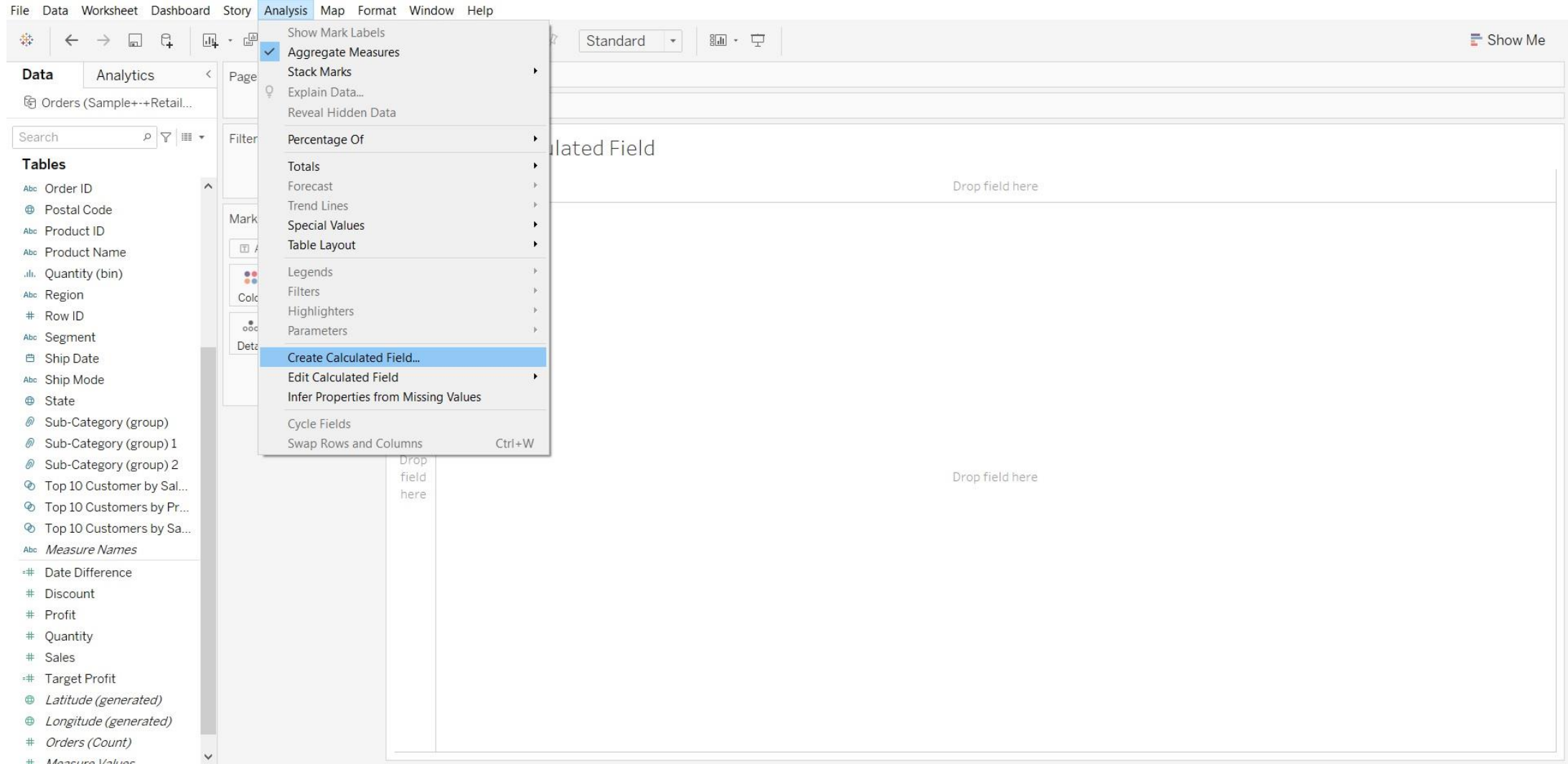
HOW TO CREATE A DATE CALCULATED FIELD

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



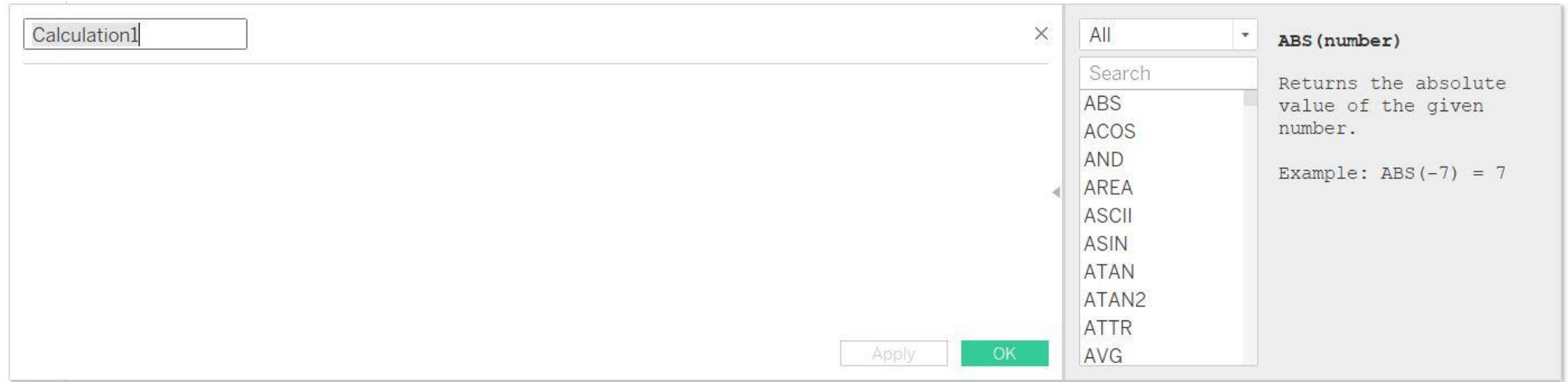
HOW TO CREATE AN ARITHMETIC DATE CALCULATED FIELD

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**

Profit Ratio

Apply OK

All

Search

- ABS
- ACOS
- AND
- AREA
- ASCII
- ASIN
- ATAN
- ATAN2
- ATTR
- AVG

ABS (number)

Returns the absolute value of the given number.

Example: $\text{ABS}(-7) = 7$

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

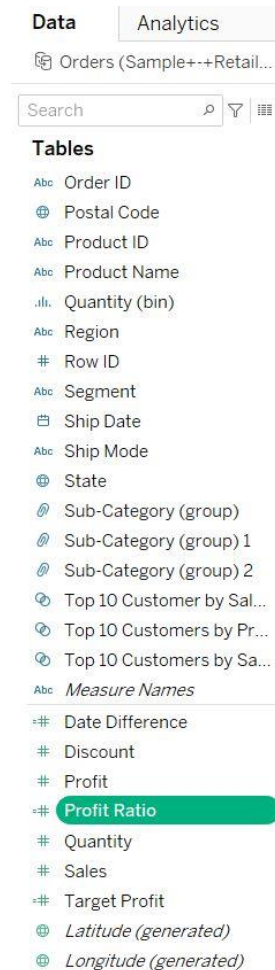
The calculation is valid message must be present in bottom left side of the calculation editor

Click **OK**

The screenshot shows a 'Calculation Editor' window. At the top, there is a label 'Profit Ratio' and a close button 'X'. Below this is a text area containing the formula `SUM([Profit]) / SUM([Sales])`. At the bottom left, a status message reads 'The calculation is valid.' At the bottom right, there are two buttons: 'Apply' and 'OK' (which is highlighted in green). To the right of the main editor is a sidebar. It features a dropdown menu set to 'All' and a search bar. Below the search bar is a list of functions: ABS, ACOS, AND, AREA, ASCII, ASIN, ATAN, ATAN2, ATTR, and AVG. To the right of this list, the 'ABS(number)' function is detailed, stating it 'Returns the absolute value of the given number.' and providing an example: 'Example: ABS(-7) = 7'.

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 "="



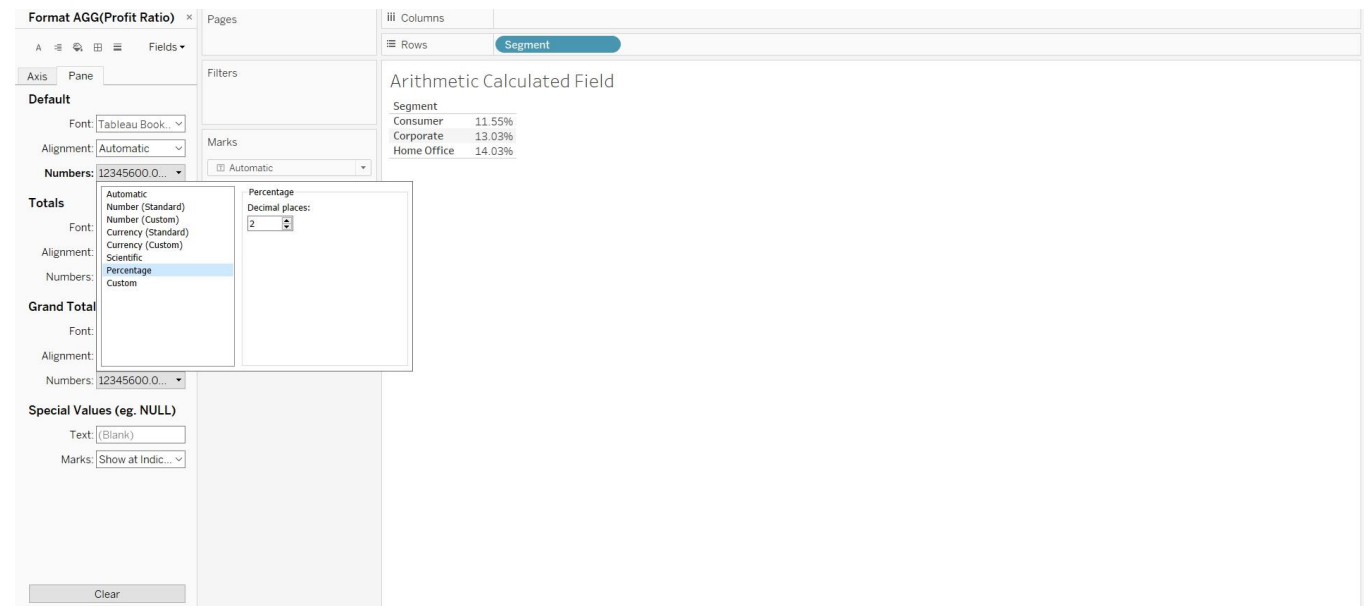
HOW TO CREATE AN ARITHMETIC DATE CALCULATED FIELD

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



The screenshot shows the Tableau interface with a calculated field table. The 'Columns' shelf contains 'Segment'. The 'Marks' shelf contains 'AGG(Profit Ratio)'. The table displays the profit ratio for three segments: Consumer (0.11548), Corporate (0.13026), and Home Office (0.14034).

Segment	AGG(Profit Ratio)
Consumer	0.11548
Corporate	0.13026
Home Office	0.14034



The screenshot shows the Tableau interface with the 'Format AGG(Profit Ratio)' dialog box open. The 'Numbers' section is set to 'Automatic'. The 'Percentage' section is set to 'Percentage' with 'Decimal places' set to 2. The 'Grand Total' section is set to 'Automatic'. The 'Special Values (eg. NULL)' section is set to 'Show at Indic...'. The table displays the profit ratio for three segments: Consumer (11.55%), Corporate (13.03%), and Home Office (14.03%).

Segment	AGG(Profit Ratio)
Consumer	11.55%
Corporate	13.03%
Home Office	14.03%