

cheatsheet

Туре	Note
≞ Status	Completed

1. Basic Tableau Cheatsheet — Common Measures & Tasks

Task	How-To / Formula	Notes
Top N Filter	Drag dimension to Filters > Top tab > Top N by measure	Easy way to limit data
% of Total	Right-click measure > Quick Table Calc > % of Total	Shows proportion
Running Total	Quick Table Calc > Running Total	Cumulative sums
Difference / Change	Quick Table Calc > Difference or Percent Difference	Show changes over time
Rank	Quick Table Calc > Rank	Ranking values
Average	AVG([Field])	Calculate mean
Count / Count Distinct	COUNT([Field]) / COUNTD([Field])	Total or unique counts
IF Condition	IF [Field] > 100 THEN "High" ELSE "Low"	Categorize data
Create BINs	Right-click field > Create > Bins	For histograms
Calculated Field	Example: [Sales] / [Profit]	Custom formulas
Filter by Date	Drag date field > Filters	Filter by time

2. Extra Features to Know

Feature	Use Case / Notes
Relative Date Filter	Filter recent periods like last 7 days
Parameters	Create dynamic controls for measures, colors, filters
Heatmap / Highlight	Use colors to emphasize data

Totals	Analytics pane > Totals for row/column sums
Dual Axis	Combine 2 charts (bar + line)
Dashboard Actions	Add interactivity like click-to-filter
Tooltip Customization	Edit hover details
Sort by Field	Sort bars, rows easily

3. Step-By-Step Quick Guide to Common Tasks

Connect to Data

• Open Tableau > Connect to "Sample - Superstore Subset.xlsx"

Create Parameter for Measure or Top N

- Right-click Dimensions > Create Parameter
- Name it (e.g., "Choose Measure")
- Data type: String / Integer
- List values (e.g., Sales, Profit, Top 10)

Create Calculated Field with Parameter

```
CASE [Choose Measure]
WHEN 'Sales' THEN SUM([Sales])
WHEN 'Profit' THEN SUM([Profit])
END
```

Build Chart

- Drag Dimension (e.g., Region) to Columns
- Drag Calc Field to Rows
- Show Parameter Control
- Format axis titles with parameters

Apply Top N Filter

- Drag dimension to Filters
- Top tab > Top N by measure

Use Parameter to Change Color

- Create parameter (e.g., target threshold)
- Calc field: SUM([Sales]) > [Target]
- Drag calc field to Color in Marks card
- Edit colors (True = green, False = gray)

Dual Axis Chart with Parameter to Switch Chart Type

- Parameter for chart type (Bar/Line)
- Calc fields with IIF:

```
IIF([Chart Type] = 'Bar', SUM([Sales]), NULL)
IIF([Chart Type] = 'Line', SUM([Sales]), NULL)
```

• Dual axis, synchronize, format marks accordingly

4. Other Useful Measures and Calculations

Measure Type	Formula / How to Use
Median	MEDIAN([Field])
Min / Max	MIN([Field]) , MAX([Field])
Standard Deviation	STDEV([Field])
Percentile	PERCENTILE([Field], 0.9) (for 90th pct)
Window Calculations	WINDOW_SUM() , WINDOW_AVG() for running/windowed sums

5. Date Functions & Parameters

Task	Formula / Method
Extract Year	YEAR([Date])
Extract Month	MONTH([Date])
Date Difference	DATEDIFF('day', [Start Date], [End Date])
Use Date Parameter	For dynamic date filtering or range selection

6. String Parameters, Sets & Groups

- Use string parameters to let users pick dimensions or measures
- Use Sets to group top customers or highlight parts of data
- Use Groups to combine categories into simpler buckets

7. Table Calculations to Remember

- Running Total
- Percent Difference From
- Rank
- Moving Average

Use "Quick Table Calculation" menu to apply these fast.

8. Parameter-Driven Filters

- Dynamic Top N controlled by parameter
- Threshold filters based on parameter value
- Calculated fields flagging records above or below thresholds

9. Interactivity & Dashboard Elements

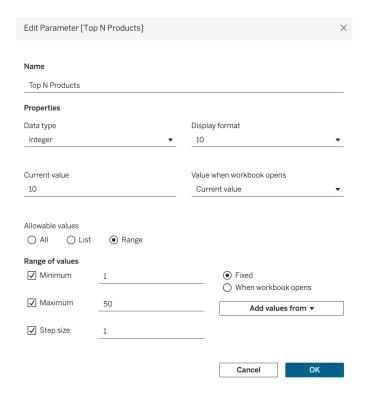
- Show Parameter Controls for user choices
- Filter and Highlight Actions for interactive dashboards
- Customize tooltips for better info display

10. Common Pitfalls

- Forgetting to synchronize dual axes
- Mixing aggregates with raw fields in calculations
- Not showing parameter control after creating parameter
- Filter order mistakes (context vs normal filters)

From assignment

Top N Products



Is In Top N

[Product Sales Rank] <= [Top N Products]

Product Sales Rank

RANK_UNIQUE(SUM([Total Sales]), 'desc')