Tricks with charts in Tableau
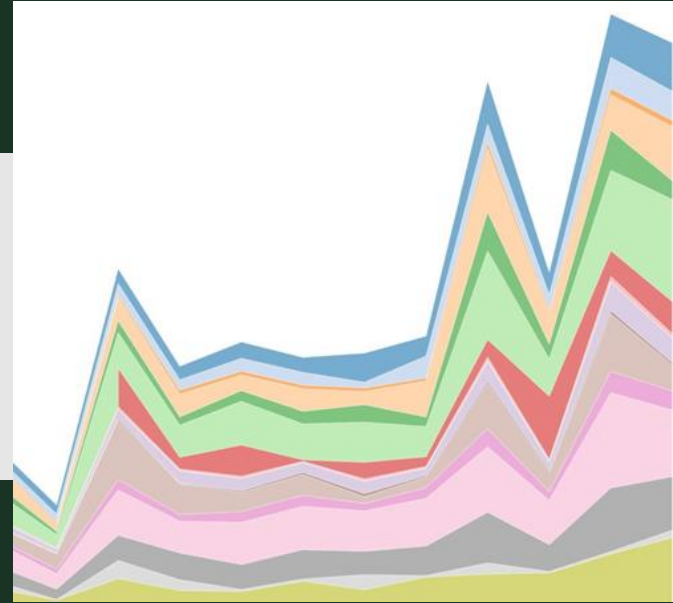
While we're waiting to begin, please answer in the Zoom chat:

How are your projects going? ☺

Masterschool

DISCLAIMER

Everything shown in this presentation is for demonstration purposes only – to show you how certain things work (and for inspiration). This is NOT a direction on how to do your projects – that's for your team to decide.

Making charts more interactive

Let the user decide which fields (s)he wants to see in dimensions \ metrics

Step 1. Create Parameter(s) with fields that can be used as a dimension \ metric

Step 2. Create a Calculated field which would use the parameter with dimension options

```
Dimension_choice

CASE [Per_what]
WHEN 'Customer Segment' THEN [Customer Segment]
WHEN 'Shipping Region'  THEN [Shipping Region]
WHEN 'Product Category' THEN [Product Category]
END
```

This is what a user would be choosing when we "Show Parameter" and it would used as a filter:
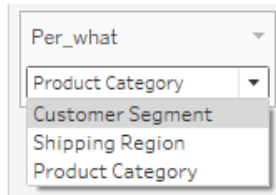
The actual dimensions in your dataset that are going to be used
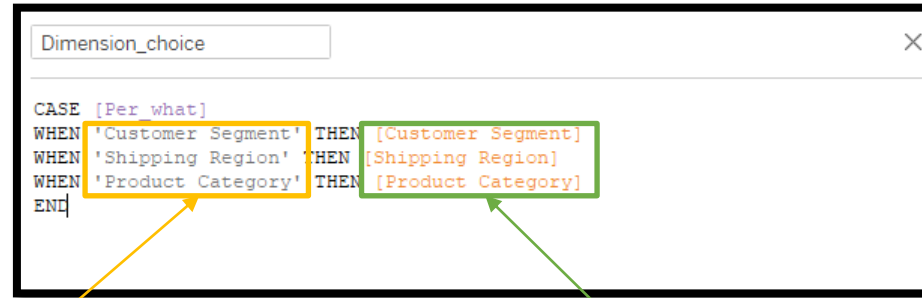
```
Per_what                    ▼
Product Category          ▼
Customer Segment
Shipping Region
Product Category
```
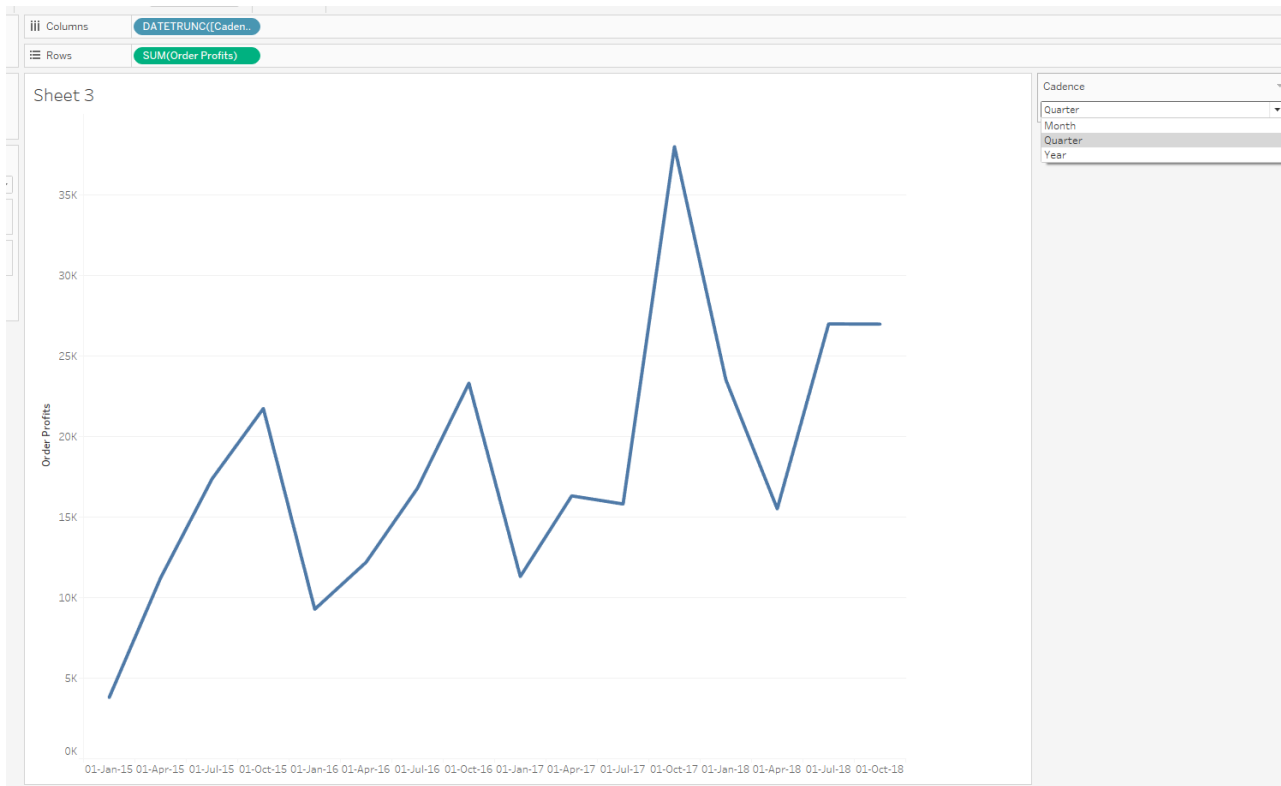
Step 3. Create a chart, your new calculated field can be used as a dimension on its own or for Color
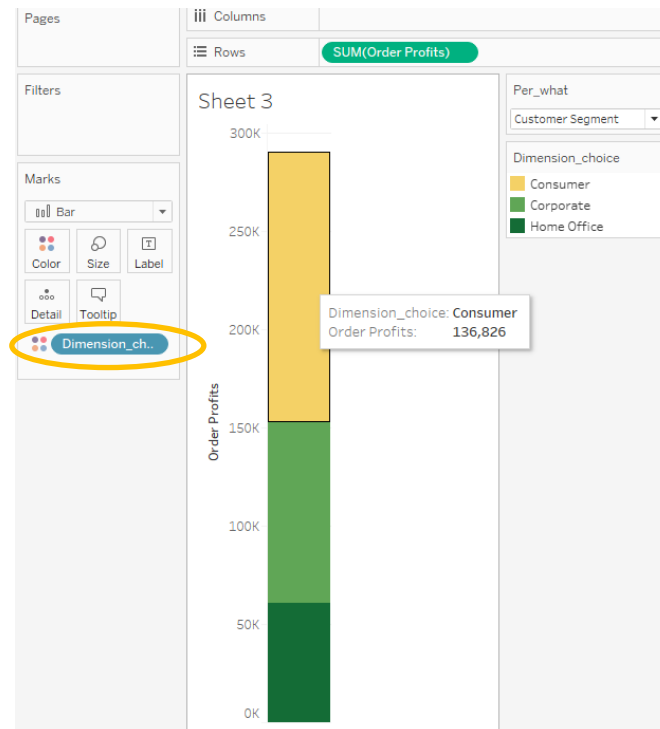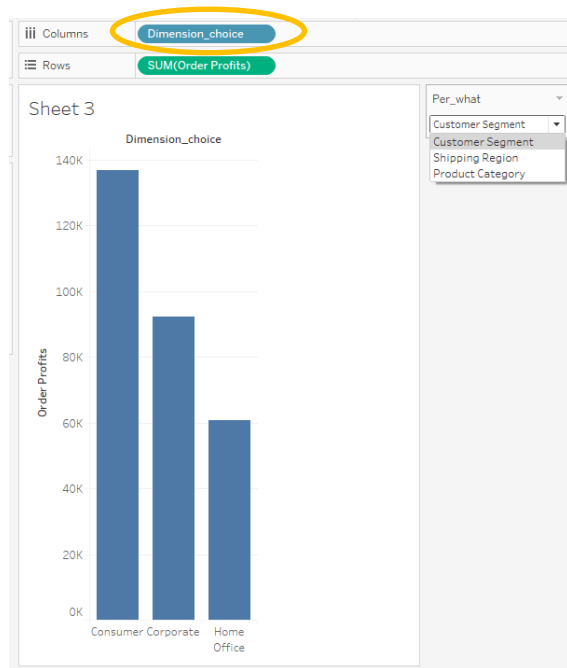
When you change via the filter – it would change in the chart as well, but technically it would be the same chart:
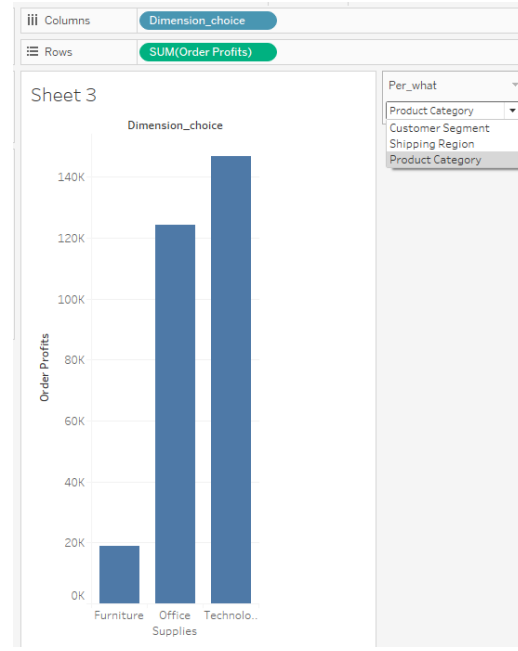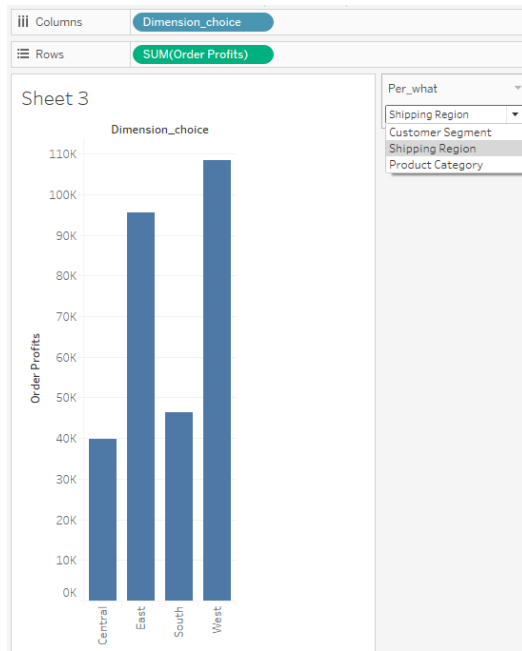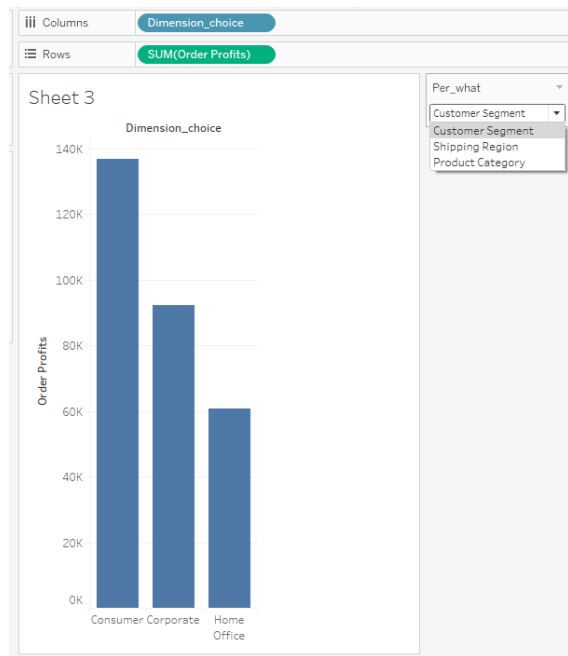
The same thing can be done with Metrics and even dates – in case you want a user to be able to choose the level of detail:
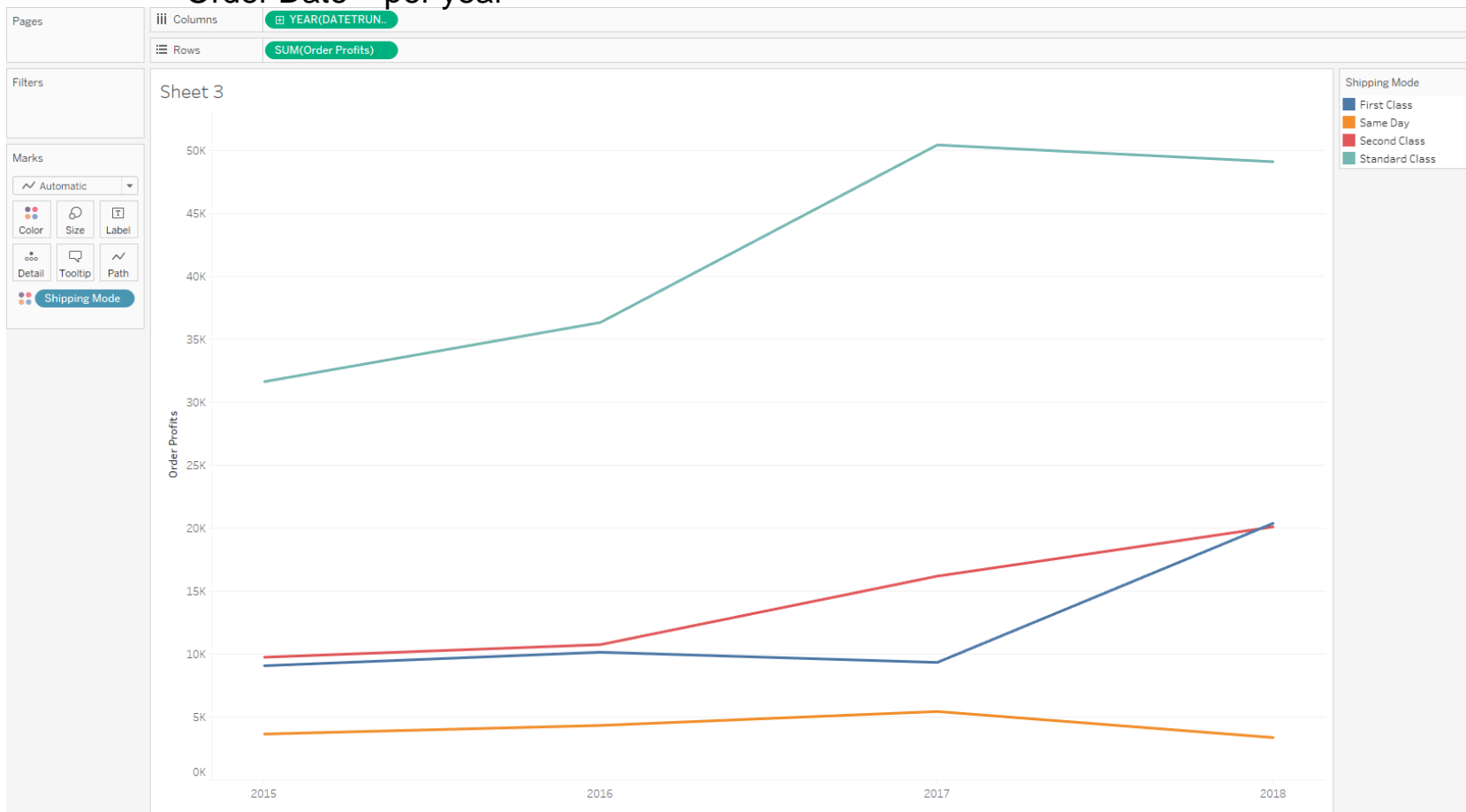
On this chart everything is interactive: we choose dimension by which we show the data, metrics which we sum and the level of detail of the date axis. The name changes automatically according to the filter selections:
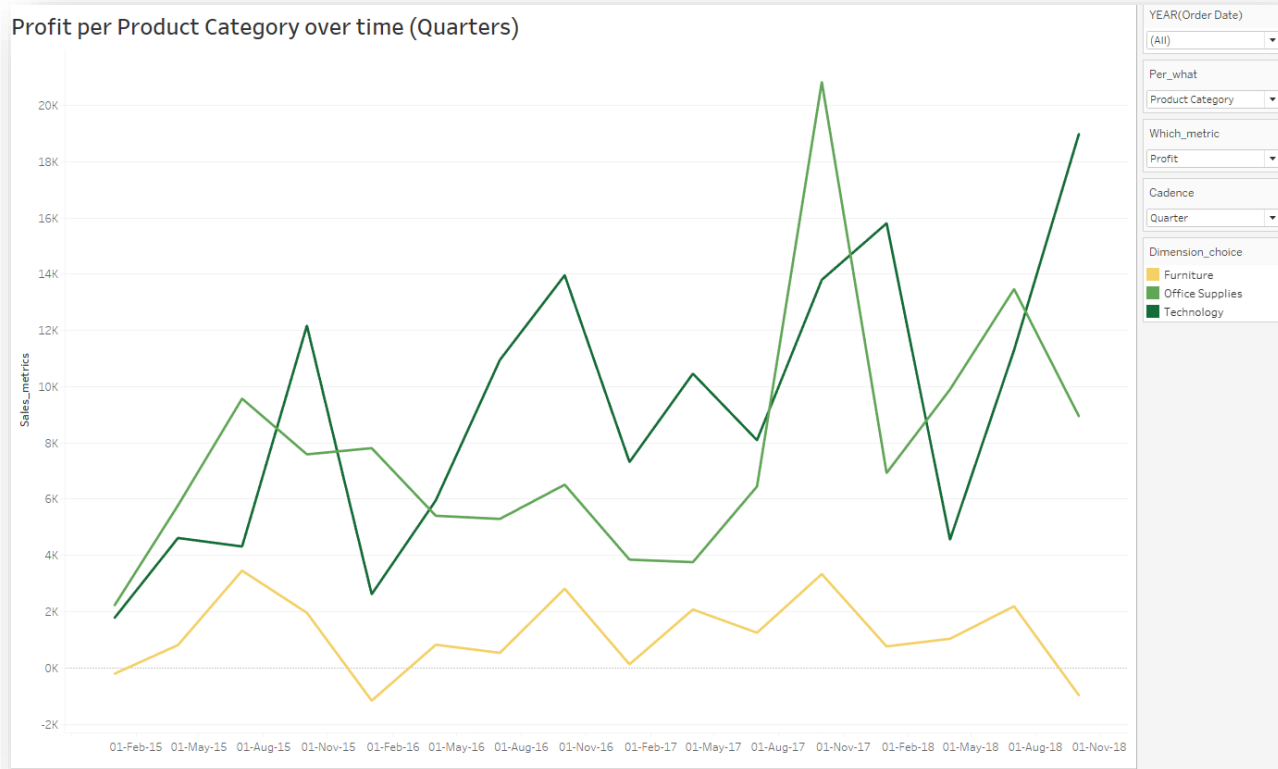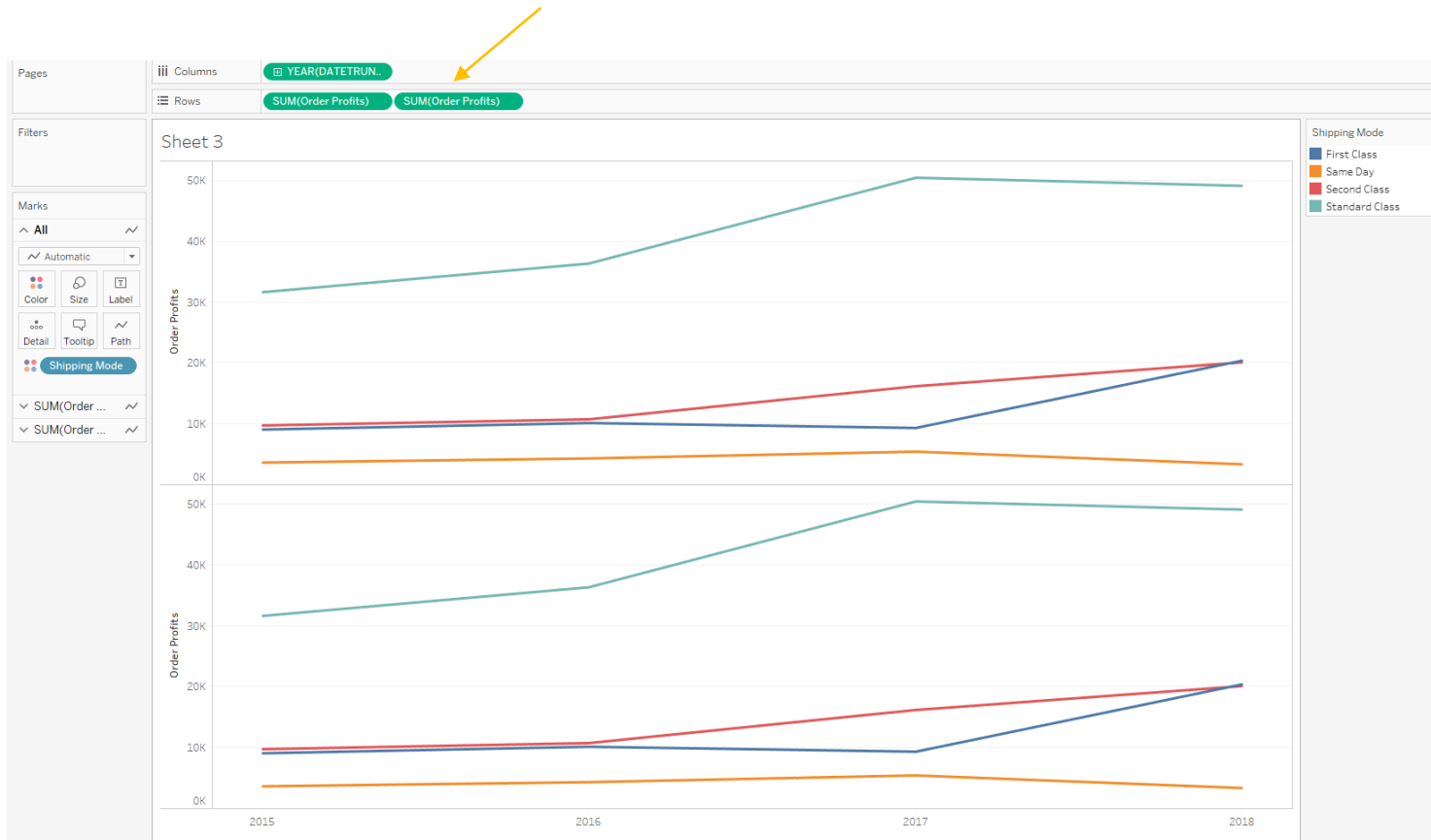
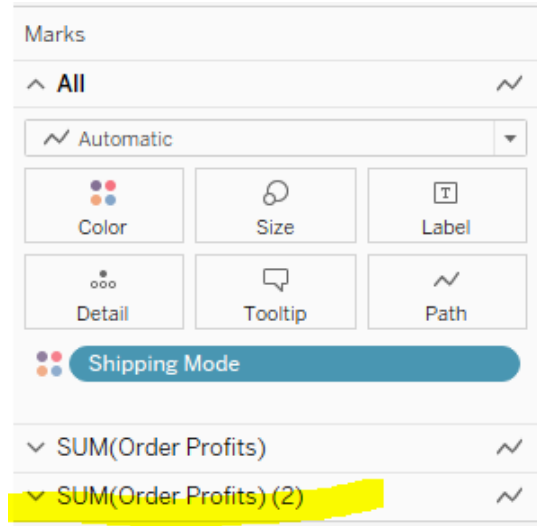# Adding a total line to line charts

Order Date – per year

Step 1. Drag exactly the same metric next to the existing one:

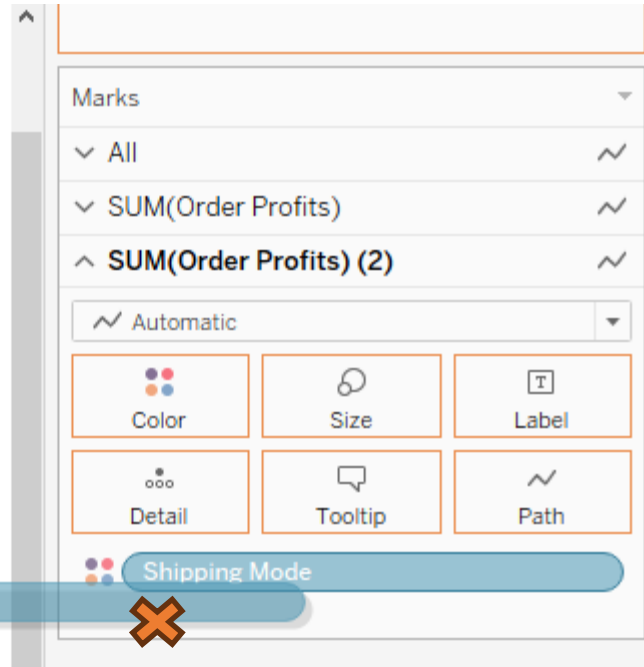**You end up with 2 charts which look the same on top of each other and 2 toolbars.**

Step 2. Remove the shipping mode from our newly added chart

You end up with a proper chart by shipping mode + the total line:
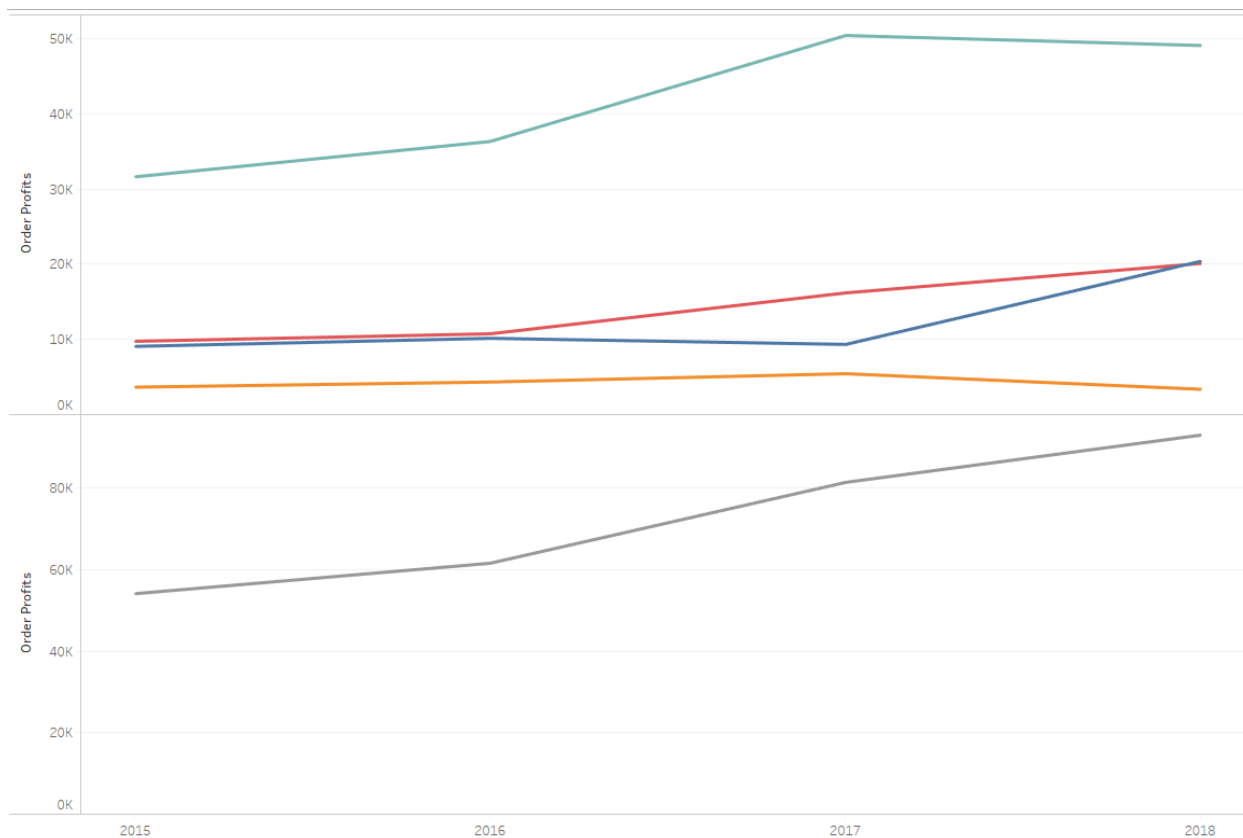
Step 3. Unite them into one chart:

- Right-click the Profit axis, select Dual Axis:

- Right-click the Profit axis one more time, select Synchronize Axis

Step 4. Make your new total line more noticeable

FUN FACT: You don't need all that hustle to add totals to a bar chart, for example, it only requires this:
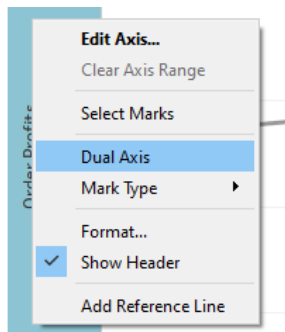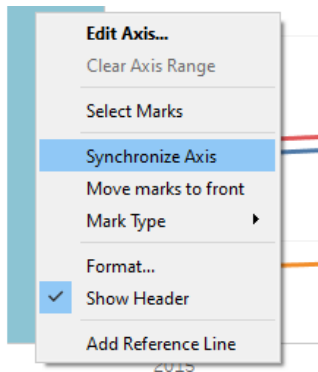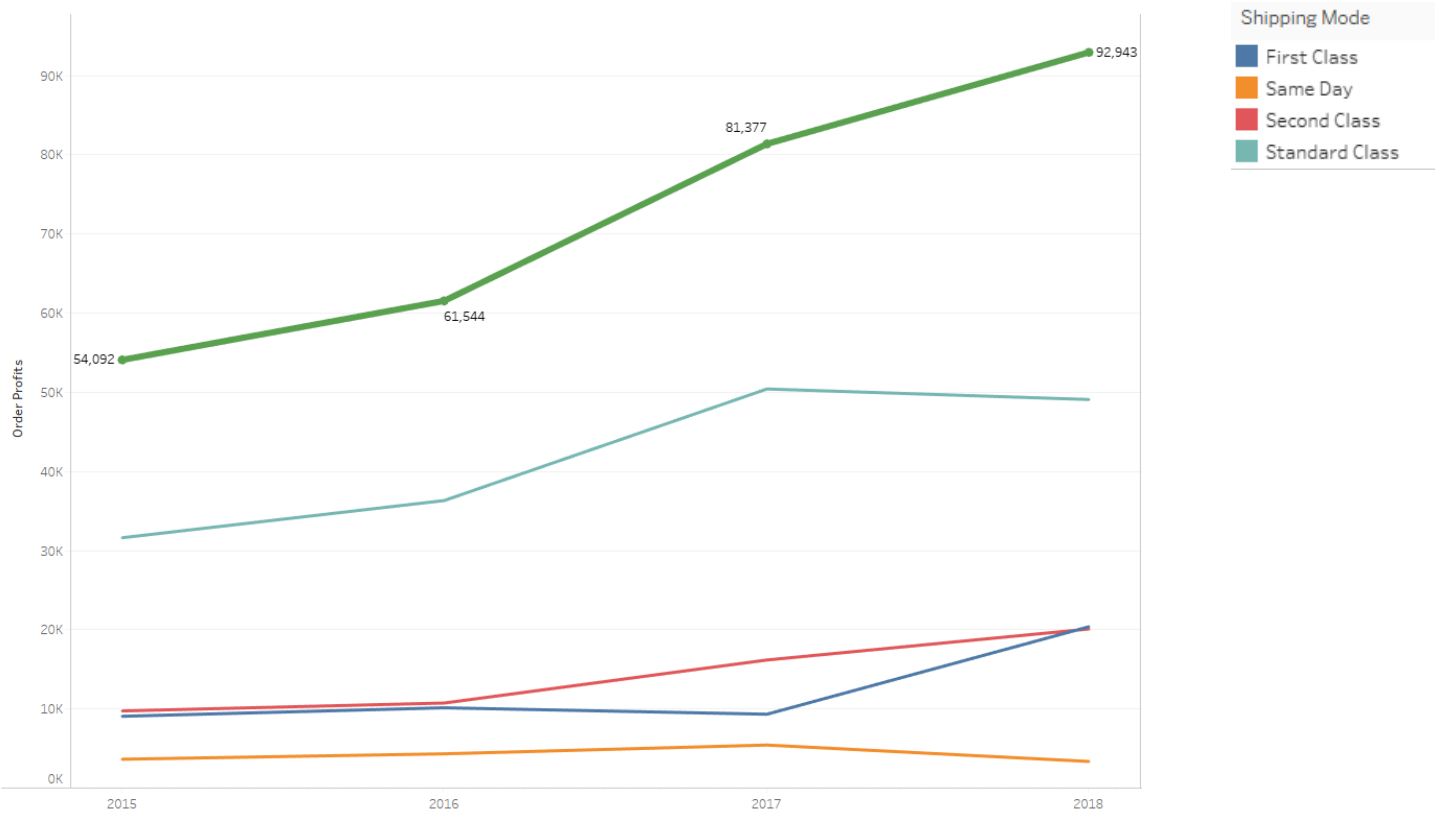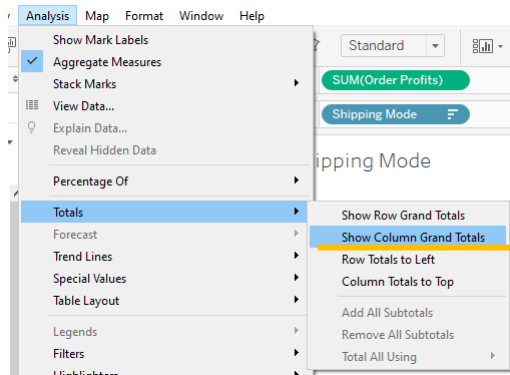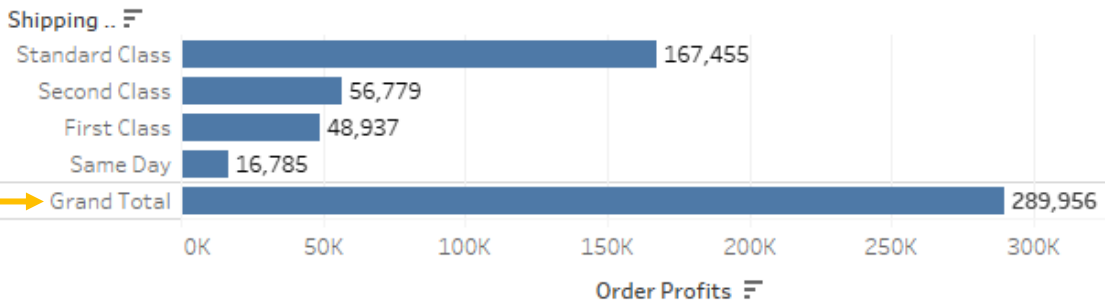
Creating "Others" category and sorting it

We have 17 product subcategories in our data.
We get a request from management to create a bar chart which would show only top 5 subcategories by profit and the rest would be wrapped into "Others". We should show it the last in our chart.

Produ..	
Copiers	55,618
Phones	44,492
Accessories	43,240
Paper	34,147
Binders	30,234
Chairs	27,163
Storage	20,806
Appliances	18,857
Furnishings	12,904
Envelopes	6,956
Labels	6,891
Art	6,530
Machines	3,387
Fasteners	1,130
Supplies	-1,187
Bookcases	-3,479
Tables	-17,733

Top 5 shown as is

Others

Step 1. Right click Product Subcategory → Create Set
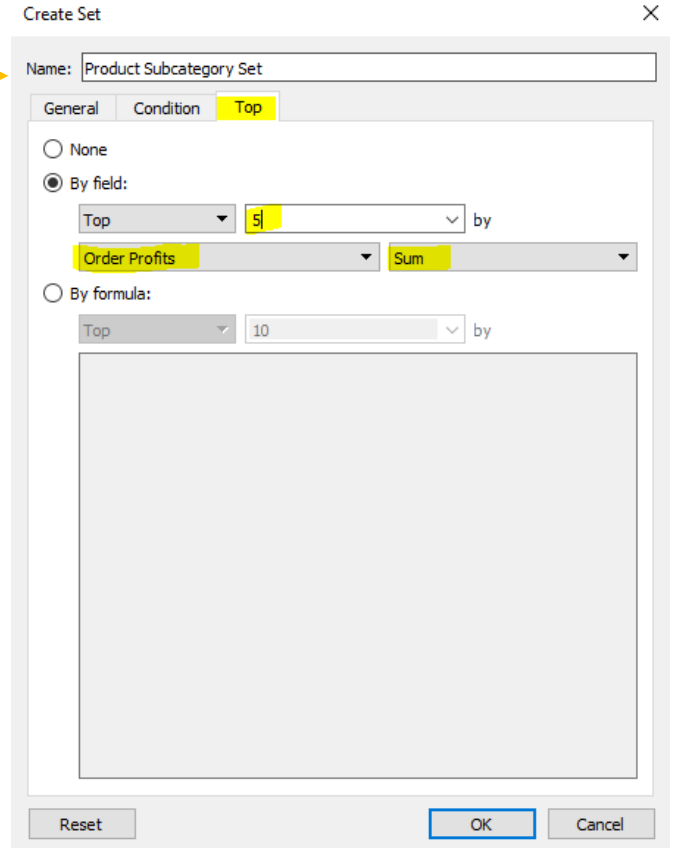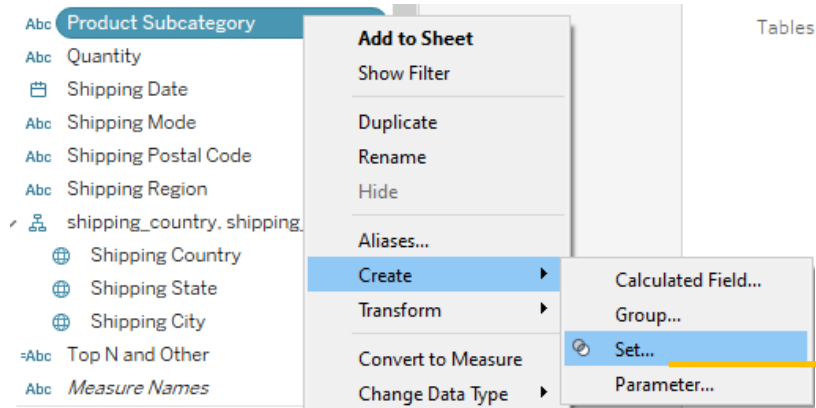
Step 2. Create a Calculated field which would use the new Set:

Top N and Other   ×

IF   [Product Subcategory Set] THEN [Product Subcategory] ELSE 'Others' END

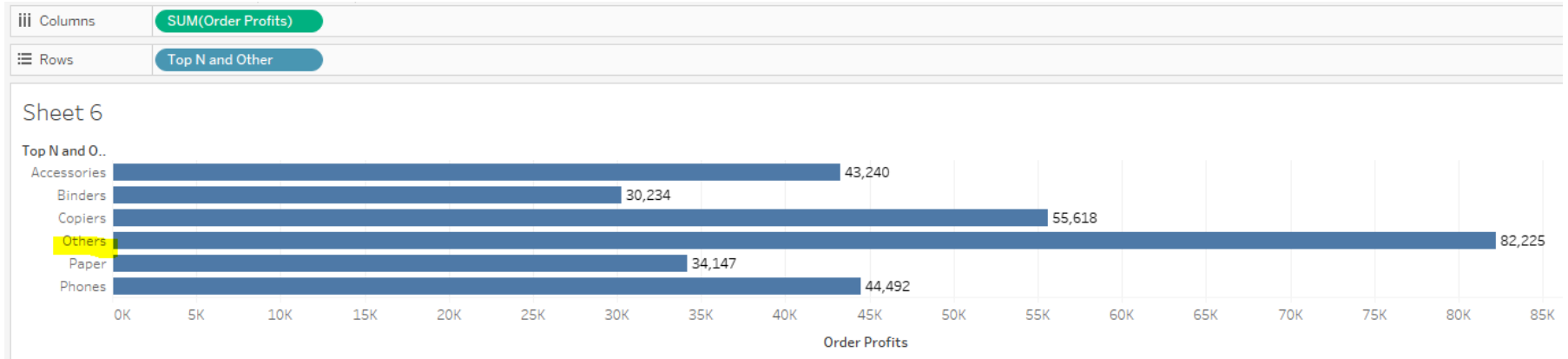   ▶

The calculation is valid.   Apply   OK

Step 3. Create a Bar chart using the new Calculated field "Top N and Other"

Columns	SUM(Order Profits)
Rows	Top N and Other

Sheet 6

Top N and O..

	Order Profits
Accessories	43,240
Binders	30,234
Copiers	55,618
Others	82,225
Paper	34,147
Phones	44,492

Order Profits

Step 4. Create a Calculated field which we would later use for sorting purposes to make sure the "Others" category would always appear last:
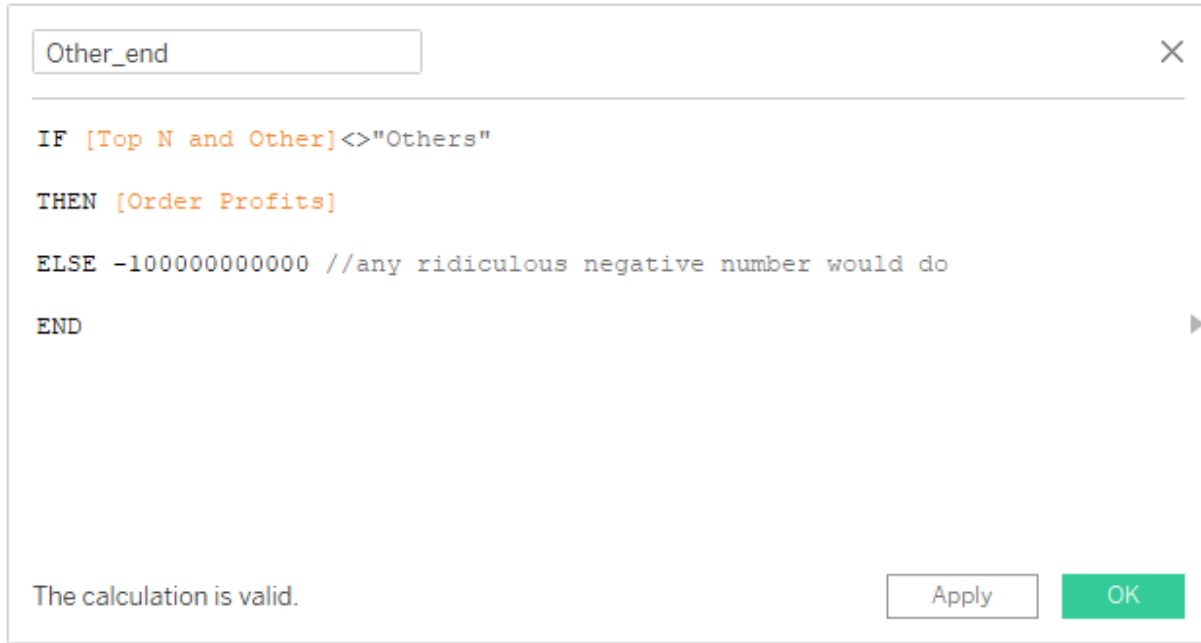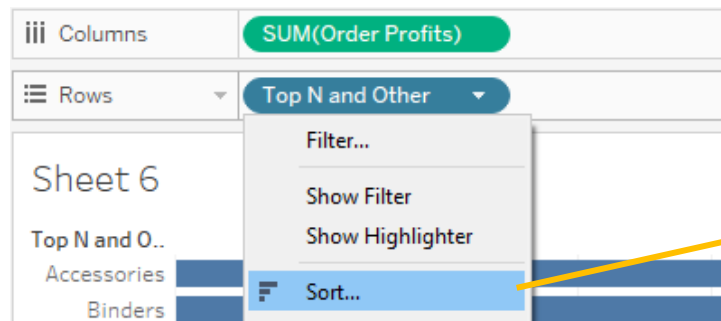
Other_end   ✕

```
IF [Top N and Other]<>"Others"

THEN [Order Profits]

ELSE -100000000000 //any ridiculous negative number would do

END
```

▶

The calculation is valid.   Apply   OK

Step 5. Sort:

"Others" is at the end of the bar chart!

Thank you for your attention!