

Few Important Topics

Measure Name and Values:- Whenever you are connecting the datasources and importing those data sources there are few auto generated fields are created in Tableau.

- ① Measure Names (Dimensions)
 - ② Latitude (Generated)
 - ③ Longitude (Generated)
 - ④ Number of Records
 - ⑤ Measure Values
- } (Measures)

All the autogenerated fields are in italic format.
Drag & Drop Number of Records in Label it will give the Total number of Records

Drag & Drop Category in Row Shelf

Measure names:-

Drag & Drop Measure Names in Rows Shelf.

Drag & Drop Measure Values in Label (Text)

Graphical format:- Double click on Measure Values.

Measure names & values usage:-

In some places charts are failed to combine those places we can use measure names.

Columns:- Year

Rows :- Sales Profit ShippingCost

↳ Dual axis

Here Sales & profits are combined. If we want

To combine shipping cost is not possible.

Drag & Drop order date in column

Measure Names in Filter Shelf

Profit

Sales

Shipping Cost

click on ok.

Drag & Drop Measure Values in Rows.

Drag & Drop Measure Names in Colos.

Now all combined.

Parameters:- Parameters are the dynamic values.
using this parameters we can change the graph.

Parameters with filters:-

Col:- Sales

Rows:- Sub-category \equiv Descending order.

place Subcategory in filter shelf

② By field

TOP

Apply & ok.

for suppose if you want to see TOP 5, ③ ② ②

so everytime you need to edit the filter.

So this approach is not user friendly. To
avoid this we will use parameters.

TOP (Create new parameter)

Name:- TOP N

Current Value:- 10

Min []

Max [10]

Click Apply & OK

now we can see right hand side parameters in slides format.

If you want enter value TOP N

Select Type In option.

Parameters with Sets:-

Col:- Sales

Rows:- Sub-category = Descending order

If you want to highlight the Colos based on
TOP 5 () 2 or TOP N elements

Subcategory → Create Set

Name:- Myset

Top [TOP N]

TOP N → Show parameter Control.

Drag and Drop Myset in Colos.

Combine:- Combine is used to combine two or more dimensions Together.

Rows:- Category, Subcategory

Drag and Drop Sales in Text.

If you want to find out the ^{highest} Sales done based on Category and Subcategory is not possible so we will use Combine.

Category } Create

Subcategory } Combine Field.

Drag & Drop Category Subcategory in Row

Drag & Drop Sales in Label

Number functions:-

Rows: Subcategory \equiv descending order

Drag and Drop Sales in Text

Drag and drop Profit in the work area.

Subcategory Profit Sales
 \equiv \equiv \equiv

Create Calculation Field "Cost"

$\text{Sum}(\text{Sales}) - \text{sum}([\text{Profit}])$

$= \# \text{Cost}$ \rightarrow is a calculated field.

Drag and drop cost in work area.

Min, MAX:-

Rows: Subcategory \equiv Ascending order

Drag and drop Sales in work area.

Go to "Analysis" \rightarrow uncheck the "aggregated Measure".

Then we will see the Individual Data.

Go back to "Analysis" check the aggregated measure

\rightarrow Create calculated field

Maximum $\rightarrow \text{MAX}([\text{Sales}])$

\rightarrow Drag and Drop maximum in work area.

\rightarrow Same process for minimum

Minimum $\rightarrow \text{MIN}([\text{Sales}])$

Ceiling and Floor:-

Rows: Subcategory \equiv Descending order

- Drag and drop Sales in work area.
 Here the Data is integer format. If you want to convert into float. $\text{sum}(\text{Sales}) \nabla \rightarrow \text{Select format} \rightarrow \text{Numbers} \rightarrow \text{Number custom}$
 → Create Calculated field
 $\text{Ceiling: } \text{CEILING}(\text{sum}([\text{Sales}]))$
 → Drag and Drop Ceiling in work area.
 → Same process for floor also.
 $\text{Floor: } \text{FLOOR}(\text{sum}([\text{Sales}]))$
 → Drag and Drop Floor in work area.

String Functions:-

Rows: subcategory

Convert the text into upper case.

→ Create calculation field

$\text{upperText: } \text{UPPER}([\text{Sub-category}])$

Drag & drop upperText in label.

Same process for lower also

$\text{lowerText: } \text{LOWER}([\text{Sub-Category}])$

→ If you want to fetch Left most 3 characters from SubCategory.

→ Create calculated field

$\text{left: } \text{LEFT}([\text{Sub-Category}], 3)$

Same process for Right also

$\text{right: } \text{RIGHT}([\text{Sub-Category}], 3)$

Split:-

Rows:- orderid

orderid → Select Transform → Select
custom split.

Separator [-]

Split off column.

orderid - split 1 is created.

Same process for Last also.

→ Split at a time split all

Logical Functions:-

Col:- Profit

Rows:- Sub-Category =

If you want to find out high profit & low profit
→ create calculated field.

Profit Status:- IF sum([Profit]) > 5000 then
'High profit'

ELSE

'Low profit'

END

→ Drag and drop profit status in color.

Conditional formatting:-

Rows: Sub-Category = descending order

Drag and drop Sales in 'Text'

To create a Index use calculated field.

index : INDEX() → it is a continuous field. changed

Drag & Drop index in Text.

to discrete.

If you want to highlight the top 10 rows
create calculated field TOP N → [Index] <= 10

Drag TOPN and DROP in calcOS.

RANK:- Sample data:-

	Stores	Sales
A	10	
B	20	
C	20	
D	40	
E	50	

Create calculated field Rank → RANK(SUM([Sales]))

Drag & Drop Rank in Text

Rank_DENSE → RANK_DENSE(SUM([Sales]))

Rank_MODIFIED → RANK_MODIFIED(SUM([Sales])) $\rightarrow \frac{1}{4}$

Rank_UNIQUE → RANK_UNIQUE(SUM([Sales]))

Stores	Rank	Rank_modified	Rank_unique	Rank_dense	Sales
A	5	5	5	4	10
B	3	4	3	3	20
C	3	4	4	3	20
D	2	2	2	2	40
E	1	1	1	1	50

JOINS:- Same like a database Joins.

Inner Join, Left Join,
Right Join, Full Join

We can implement Join in Physical Layer.

→ Physical Layer:- Data Source Tab Double click on the source table we will get the Physical layer.

Drag and drop one more table in the physical layer.

ex:- customers.csv  orders.csv

by default it is showing inner join.

Cross Database Joins: If you want to combine two different bases sources.

ex:- Here, we are combining .xls & .csv
Products.csv

Product-id, category, sub-category.

Sales.xls

order-id, order-date, product-id, Sales-Done

- In Tableau first Import the ~~text~~ excel file
- click on Add Connection, click on Text file import .csv file.

Data Blending: It is similar to Join.

Here we will take 2 files

Office-city Sales				coffee-chain-Sales		
State-code	State	Market	Territory	Product	State	Region
203	Texas	ABC	North	Laptop	Ohio	North
206	Ohio	BDF	South	Bag	Texas	South

- In this two files Common Column is State.
- Territory column data and Region column data is same. But Column names are different with the help of Data blending we can make a relationship between Territory and Region Columns.

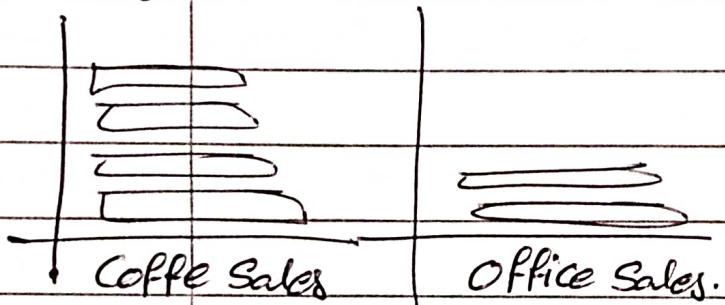
→ In Tableau worksheet under the Data tab we can see Edit Relationships. click on that.

→ Relationship is only applicable to the sheet not for the entire workbook.

Data blending Calculations:-

Col:- Sum(Coffee Sales) Sum(Office Sales)

Row:- State



If you want to create Total Sales

$\text{Sum}([\text{Office Sales}]) + \text{Sum}([\text{CoffeChains}].[\text{Coffee Sales}])$

Drag & Drop TotalSales and identify the graph. it is not correct because of NULL Values. So we need to Handle NULL Values $\text{ZN}(\text{Sum}([\text{Office Sales}]) + \text{Sum}([\text{CoffeChains}].[\text{Coffee Sales}]))$. Here we are applying ZN to office sales because it contain NULL values.

$\text{ZN} \rightarrow$ Means Converting NULL to zero.

Now you check the graph. it gives the correct Result.