LIVE DATA – It is the action done and during updation , file gets updated .

EXTRACT DATA – – It is the action done and during updation , file does not gets updated .

LIVE DATA –

1. OPEN DATA SOURCE
2. IMPORT DATA
3. GO TO SHEET 1, SELECT ROWS AND COLUMNS
4. IF NEEDED TO CHANGE ANY DATA IN EXCEL, CHANGE IT AND REFRESH IN TABLEAU FROM LIVE VS EXTRACT – REFRESH SECTION .

EXTRACT :-

1. CHANGE CONNECTION TO EXTRACT CLICK.
2. GO TO SHEET 1 , SAVE THE FILE .
3. IF ANY CHANGES DONE , IT WONT REFLECT INTO TABLEAU .

But if u want to still see the changes , right click on Live Vs extract .. go towards extract select Refresh , it will pop up with , do u want to refresh the data . and change data will be visible .

Symbol for live – extract .

 -- Extract

DRILL DOWN :-

1. STEP DOWN HIERARCHY

Difference between Dimesnion and measures with example .

Steps to create hierarchry.

1. Import Data
2. Open Sheet 1
3. Drag and Drop Subcategory to category to get hierarchical data .

Green and blue pills.

Discrete – multiple pills were there in blue.
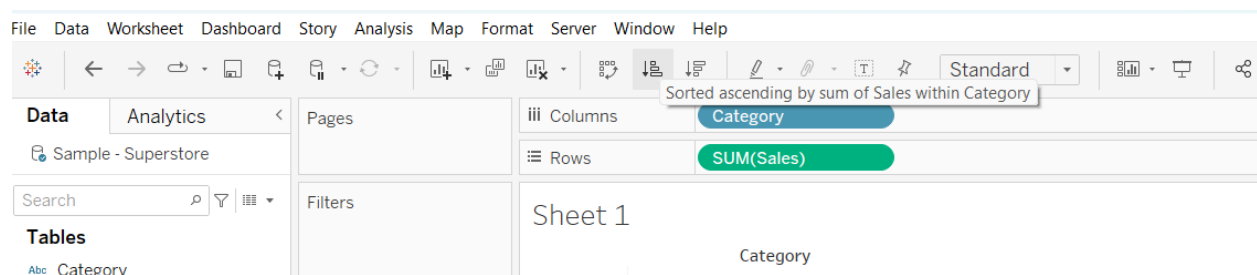
In continuous – once green pills will be there

24 – 02 – 2023
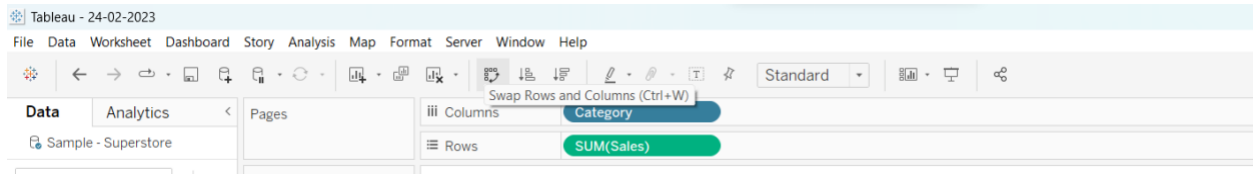
Sorting :--

There are three ways for sorting :

1 . On y axis , there will be an icon for sorting , it will sort in descending order , and for second time it will sort in ascending . on third time ,, it will get to the initial order .

2 .

3 . From pills also , we can sort into ascending and descending order .

SWAPPING ROW AND COLUMNS :

Shortcut to swap from Rows to columns --- Ctrl + W .

Grouping :--

Taking 2 or more attributes and put into the group.

1. Click on one attribute and click on another attribute with Control button .

Ungroup :-

Right click on group and select Ungroup .

Grouping by another way :--

Right click on attributes – then go to Group and then choose attributes u want to get it in group . Click on group then change the name if u wish to . click on apply and click on Ok . A new attribute will be generated with name u have given .

<u>Adding more attributes into group :-</u>

Right click on Blue pill or where u have created group . Click on edit group then select the grp u want to add then click control and select attributes u want to add , Click apply and ok .

<u>Ungrouping attribute from group -</u>
Right Click on blue pills or where u have created a grp , click on edit grp , then select group then click u wish to remove . Click on ungroup , click apply and ok to get changes .

Longitude and Latitude :-

Insert Columns into Longitude and rows to latitude then double click on city .Map will be generated.

 # Filtering:

General Filters:-

Filters > Edit Filters > General Tab > select the filters which you want to do

Wildcard filters:-

It will filter the data by matching the data giving by the user.

Filters > Edit Filters > Wildcard tab > select the option to match the data by selecting some data in the box.

Condition filters:-

This will help us to filter by using the condition given.

Filters > Edit Filters > conditions Tab > select By Field to filter the data
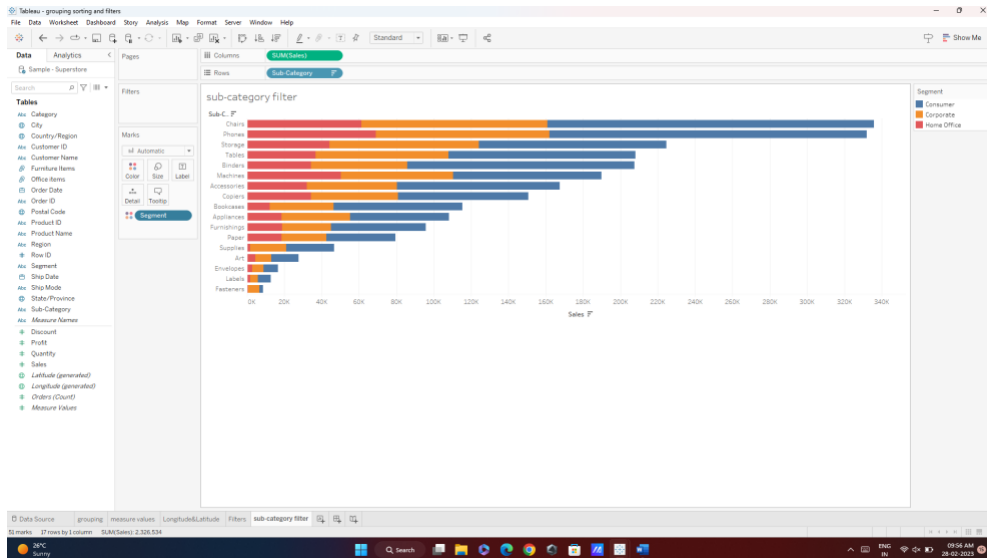
Top Filters :

Filters > Edit Filters > Top Tab > select top 5 or 10 according values to filter in the line wise.

#Applying the segments filter

Drag and drop the segment in marks tab.

It help us to show the filters according to segment

Right click on segment filter change the visualizing colors accordingly.

Parameters used in Filters.

Click on subcategory filters which is on rows.

Click on top tab > select by option > click create new parameter. New pop up window appears.

Give the name for the parameter and change the data according to you like select current value, choose the maximum range of the parameter. Then click on OK .

Than apply the filters

➔ Now new parameter option created on the left hand side of the panel. choose the parameter which you want to change. Right click it . select show parameter. You can able to dragger on the right hand side of the screen.

Set of particular items.

Click on ctrl and select the items in the visual chart. Right click on it. > select create set option.

Give the name to the set (Demo set)and click on OK.

On right panel new set will be visible drag and drop it to filters panel.
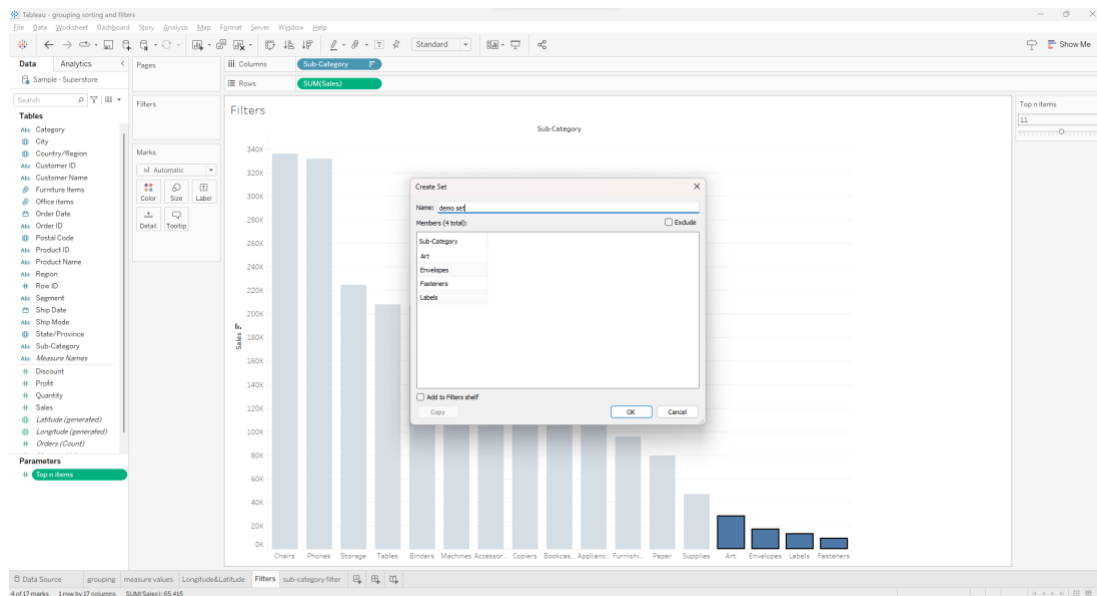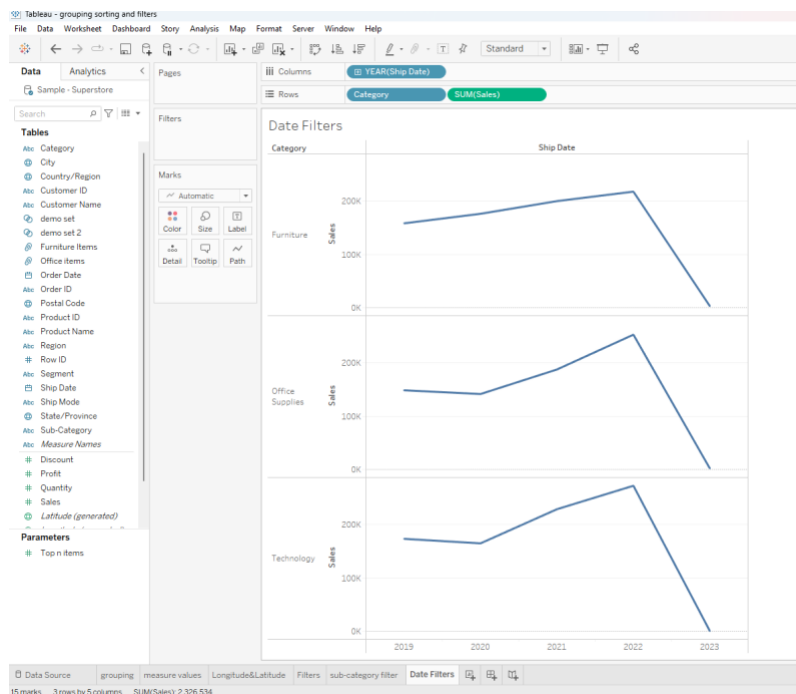
Set whole data by some conditions
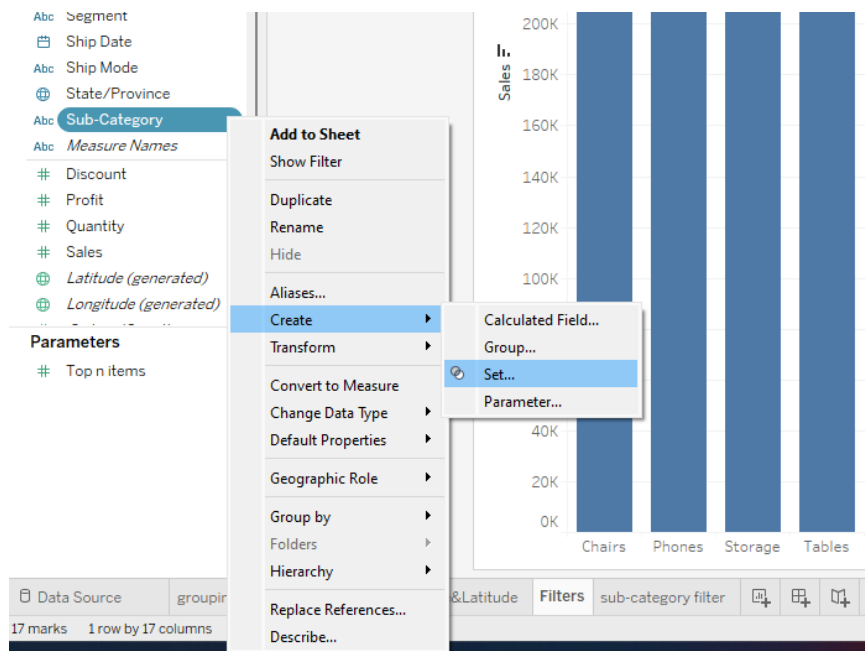
Select the filter to the set as top 5 items and click on ok to create new set 2.

Drag and drop the demo set 2 in the marks panel.it will show IN/OUT as a name . Right click on it. Show set and show filters. And you change the color as well
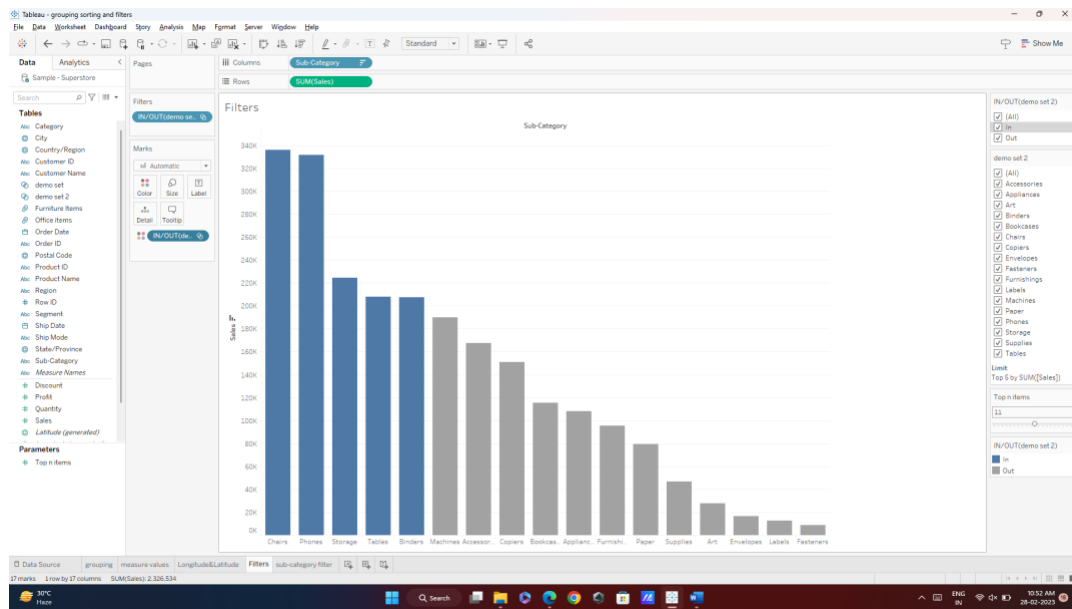
Now create the parameter in the same method.

Date Filters:

Drag Order date to the filters as shown.

There are 5 options of date filters.

1. Relative dates
2. Range of dates

3. Starting date
4. Ending date
5. Special

→Relative dates

You can select the date filter by choosing the year accordingly.

→Range of dates

Choose the range of the dates as min and max range to filter the dates.

→Starting date

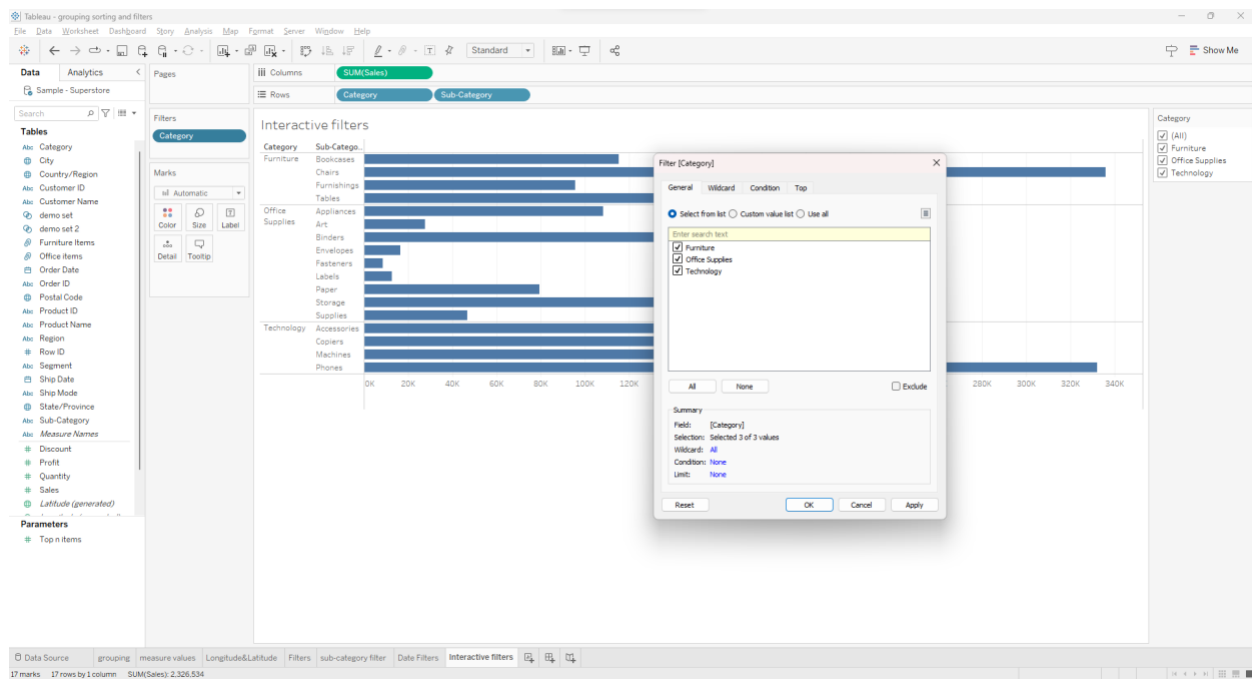Choose the starting date to filter the date from that particular starting date.

→Ending date

Choose the ending date to filter the date till that particular ending date.
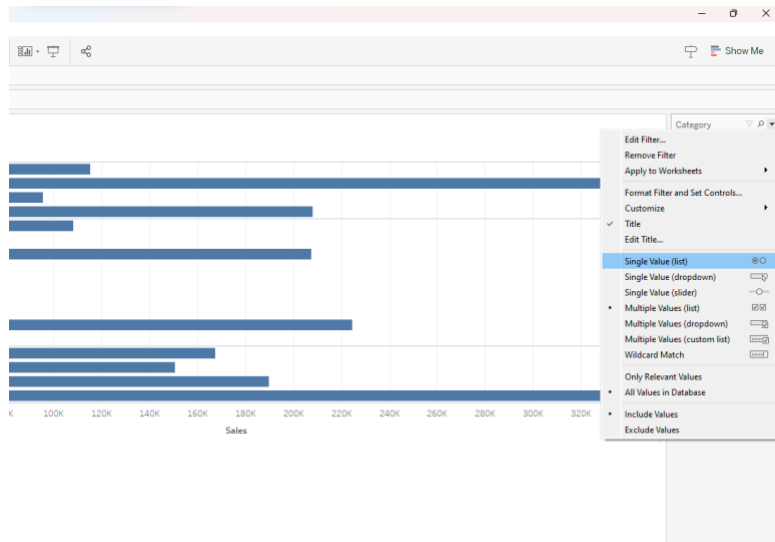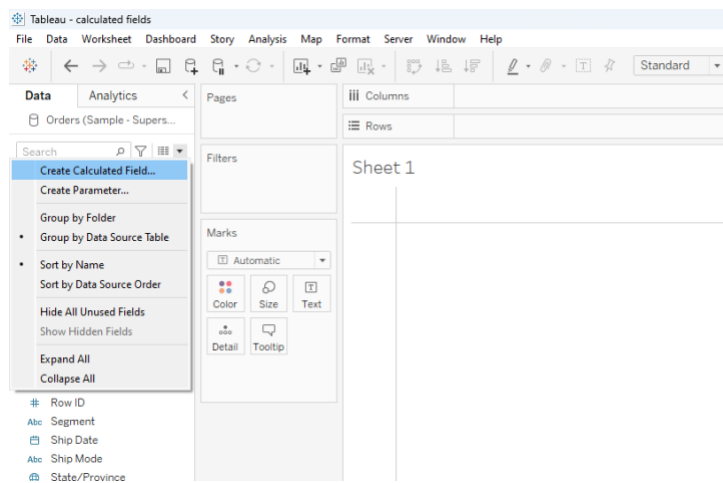
→Special
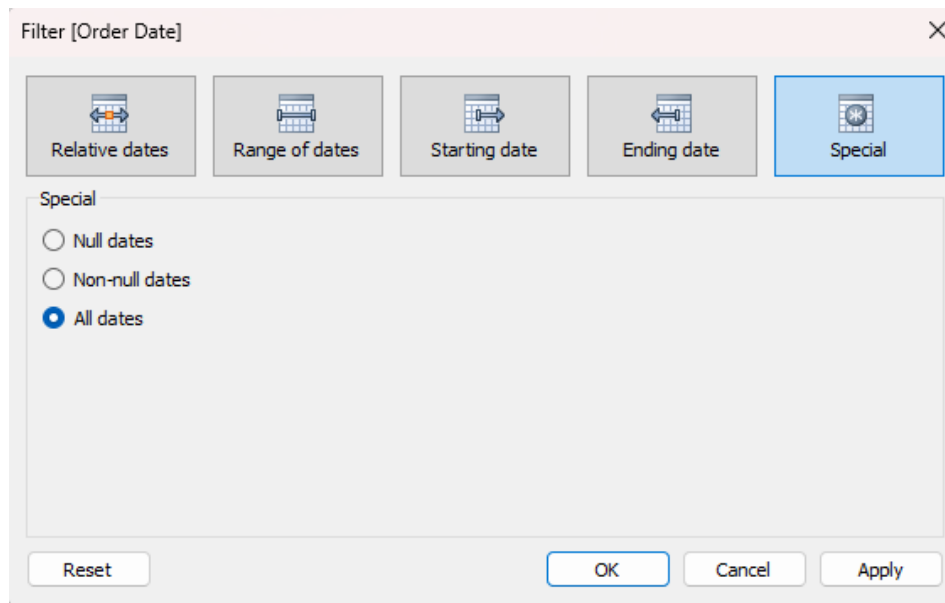
INTERACTIVE FILTERS

Apply normal filters. then right click the filters select show filters.
we can see category filters in the right hand side panel. This is known as interactive filters.

You can also apply filters in right side panel also.

CALCULATED FIELDS

Click on drop down menu. select Create calculated field.

Creating the calculated field of Total cost

Total Cost	×

[Sales]-[Profit]

▶

The calculation is valid.   Apply   OK

Calculating the field of Number of days to ship the order after ordering

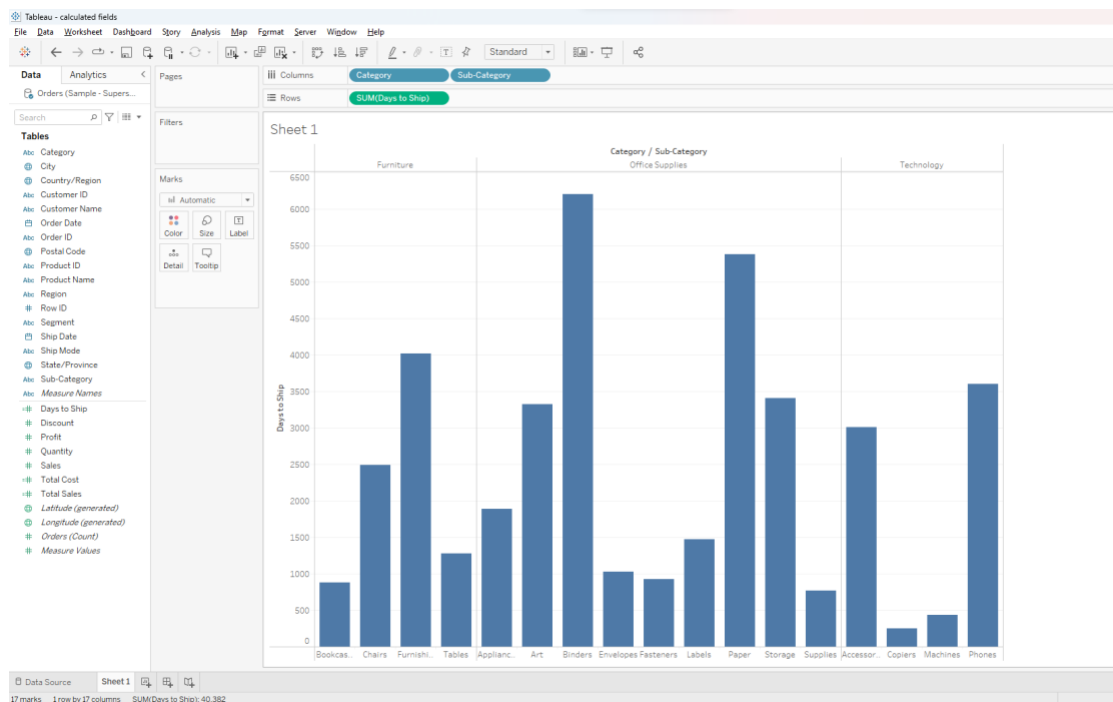| Days to Ship	×

[Ship Date]-[Order Date]

▶

The calculation is valid.   1 Dependency ▾   Apply   OK

Calculating the field of Number of days to ship according to category and sub-category

Calculate the field of Number of days to ship for the only continent North America.

Continent   ×
───

'North America'

                                                          ▶

The calculation is valid.   1 Dependency ▾   Apply   OK