

# TEXT MANIPULATION IN TABLEAU

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# VISUALISATIONS IN TABLEAU

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## RECAP

**In the last lesson, we learned how to:**

1. View and create a number of different visual chart types.

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# TABLEAU TEXT MANIPULATION

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**In this lesson, we will:**

1. Create a number of calculated fields to clean and manipulate strings of text using **LEFT**, **MID**, **FIND**, and **REPLACE**.

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## TEXT MANIPULATION IN TABLEAU

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# TEXT MANIPULATION

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# STRING MANIPULATION

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We're going to start off by learning how to manipulate string data, similar to what you learned with Excel and SQL.

Being able to manipulate your data inputs will be extremely useful, regardless of which analytics tool you're using!

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# LOAD THE DATA SET

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- For this section, we are going to use the ‘[customer.csv](#)’ data set.
  - The customer information was manually created using fictitious names, addresses that can be located on Google maps, and other well formatted data (phone, fax, email, etc.)

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# SYNTAX FOR TEXT MANIPULATION

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## **string\_01:**

`LOWER("HI THERE") = "hi there"`

`'hello' + 'my friend' = 'hellomy friend'`

## **Activity\_01:**

Combine the first and last name to make a column for full name. Make the entire name lowercase.



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# SYNTAX FOR TEXT MANIPULATION

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**string\_02:**

```
LEFT( 'hello', 1 ) = 'h'
```

**Activity\_02:**

Extract the area code from the phone number using **LEFT**.





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# SYNTAX FOR TEXT MANIPULATION

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**string\_03:**

```
REPLACE( 'hello', 'h', 'H' ) = 'Hello'
```

**Activity\_03:**

Remove the parentheses from the area code using **REPLACE**.



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# SYNTAX FOR TEXT MANIPULATION

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**string\_04:**

```
FIND( 'hello', 'e' ) = 2
```

```
LEFT( 'hello', FIND( 'hello', 'e' ) ) = 'he'
```

**Activity\_04:**

Extract the email name (everything to the left of the “@” sign) using **LEFT** and **FIND**.



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# SYNTAX FOR TEXT MANIPULATION

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**string\_05:**

```
MID( 'hello', 2 ) = 'ello'
```

**Activity\_05:**

Remove the area code from the phone number using **MID**.



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# SYNTAX FOR TEXT MANIPULATION

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## Activity\_o6:

Remove the area code from the phone number using **MID**.



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# SYNTAX FOR TEXT MANIPULATION

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## Activity\_07:

Extract the domain name of each email



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## TEXT MANIPULATION IN TABLEAU

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# CONCLUSION

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# REVIEW: TEXT MANIPULATION IN TABLEAU

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## RECAP

In today's lesson, we learned how to:

1. Perform a variety of text string function calculations in Tableau.
2. Clean data with the string functions **LEFT**, **MID**, **FIND**, and **REPLACE**.

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# TEXT MANIPULATION IN TABLEAU

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# Q&A



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## TEXT MANIPULATION IN TABLEAU

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# RESOURCES

- Summary of String Functions — reference guide (Tableau):  
[http://onlinehelp.tableau.com/current/pro/desktop/en-us/functions\\_functions\\_string.html](http://onlinehelp.tableau.com/current/pro/desktop/en-us/functions_functions_string.html)

# ADDITIONAL RESOURCE: CALCULATED FIELDS DEEP DIVE

interworks

Solutions About Us Resources **Blog**

Rows State AGG(# of Customers)

## Sales Goals for Mature & Developing Markets

Tableau Deep Dive: Sets - Calculated Fields

State # of Customers

California	577
New York	415

BY ROBERT CURTIS 11.21.16

DATA TABLEAU TABLEAU TIPS SETS

*Tableau Deep Dives are a loose collection of mini-series designed to give you an in-depth look into various features of Tableau Software.*

The last two articles of this Deep Dive are going to focus on some advanced uses of sets. We'll start by looking at how we can use sets in calculated fields. It doesn't matter if the set was created manually or if the set is based on logical conditions. In either scenario, we can use our set – so long as we use an If/Then statement to test for members IN the set (True) or members OUT of the set (False).

Let's examine a use case.

### Use Case Example

We'll use the Superstore – Sample data source that comes packaged with Tableau Desktop to construct all of our examples. In our hypothetical superstore, we want to create a sales goal based on our historical performances. We want to increase our sales by +20% in all markets that we have achieved a certain level of penetration, a minimum of 100 customers. This will be the IN

### Related Goodness

- [2016 Tableau Fantasy Football Draft Kit](#)  
8.18.16 by Will Jones
- [The Tableau Wedding Planner](#)  
9.19.16 by Maureen O'Donnell
- [Tableau Driver's Ed: Creating a Center of Evangelism](#)  
4.15.16 by Eric Shiarla
- [When to Use Tableau Reader](#)  
12.22.15 by Ben Bausili
- [Tableau Deep Dive: Sets - Constant Sets](#)  
10.28.16 by Robert Curtis