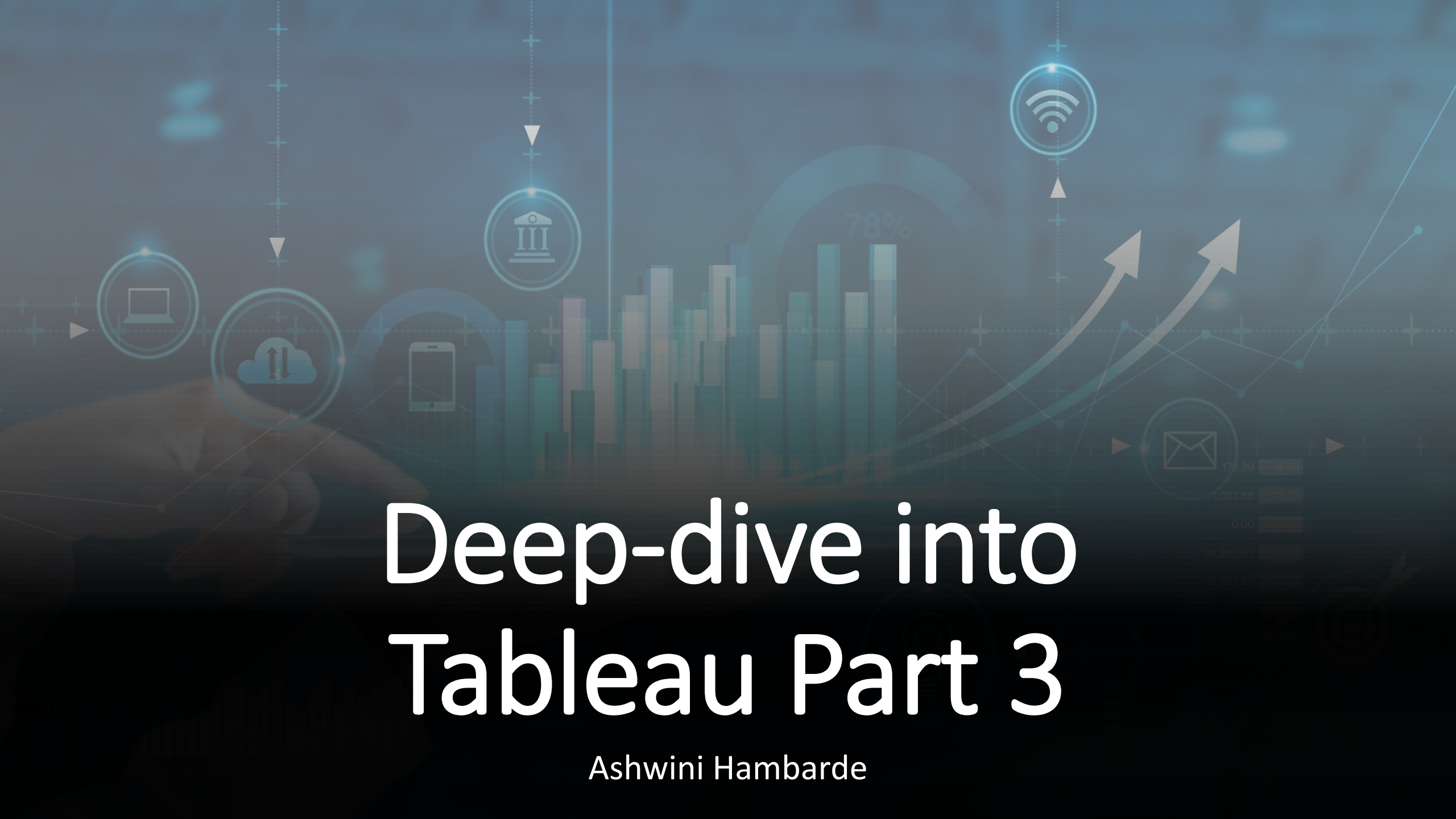


Deep-dive into Tableau Part 3

Ashwini Hambarde

Contents

Revision

1. What is BI, Explain with example
2. What is Tableau
3. Products of tableau
4. Features of tableau
5. What are different connection used in tableau
6. Difference between Live and Extract Connection
7. What are Dimension and Measure
8. What are different Data Types in Tableau
9. What are different File Extension in Tableau
10. What are the different shelves used in Tableau
11. How to sort the data in tableau
12. Explain Blend, Join and relationship

Groups

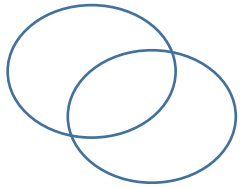
- Create a group to combine related members in a field
- Single label can be used to organize different values
- Can be used for both dimension or measure
- Group always results in a Dimension
- E.g. Group of friends

Create a group

1. By selecting data in the view
2. From a field in the Data pane

Let’s try ourselves

- Display sales for product group Refrigerator, Phone and clock
- Display sales value which is less than 5 for Category
- Display profit and sales per customer group arranged alphabetically.(e.g. A group, B group, etc.)



Set

- Sets allows us to arrange the data and related dimension values together
- Create Set for dimension only
- Set automatically adjust the values either In/Out
- Sets are created based on some conditions
- E.g. set of books and set of pencils

Type of Set

1. Dynamic Set
2. Fixed Set

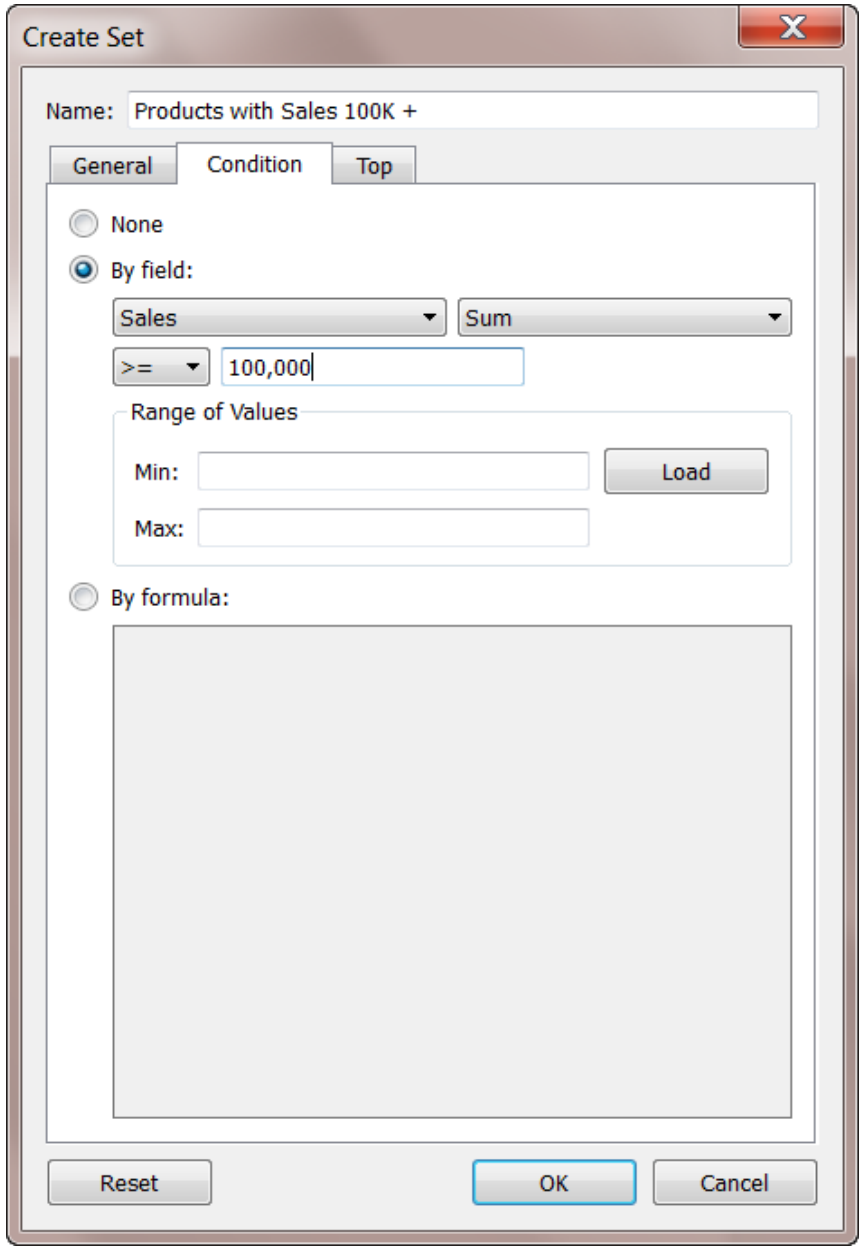
Create a dynamic set

To create a dynamic set:

In the Data pane, right-click a dimension and select **Create** > **Set**.

In the Create Set dialog box, configure your set.

- **General**: Use the General tab to select one or more values that will be considered when computing the set
- **Condition**: Use the Condition tab to define rules that determine which members to include in the set



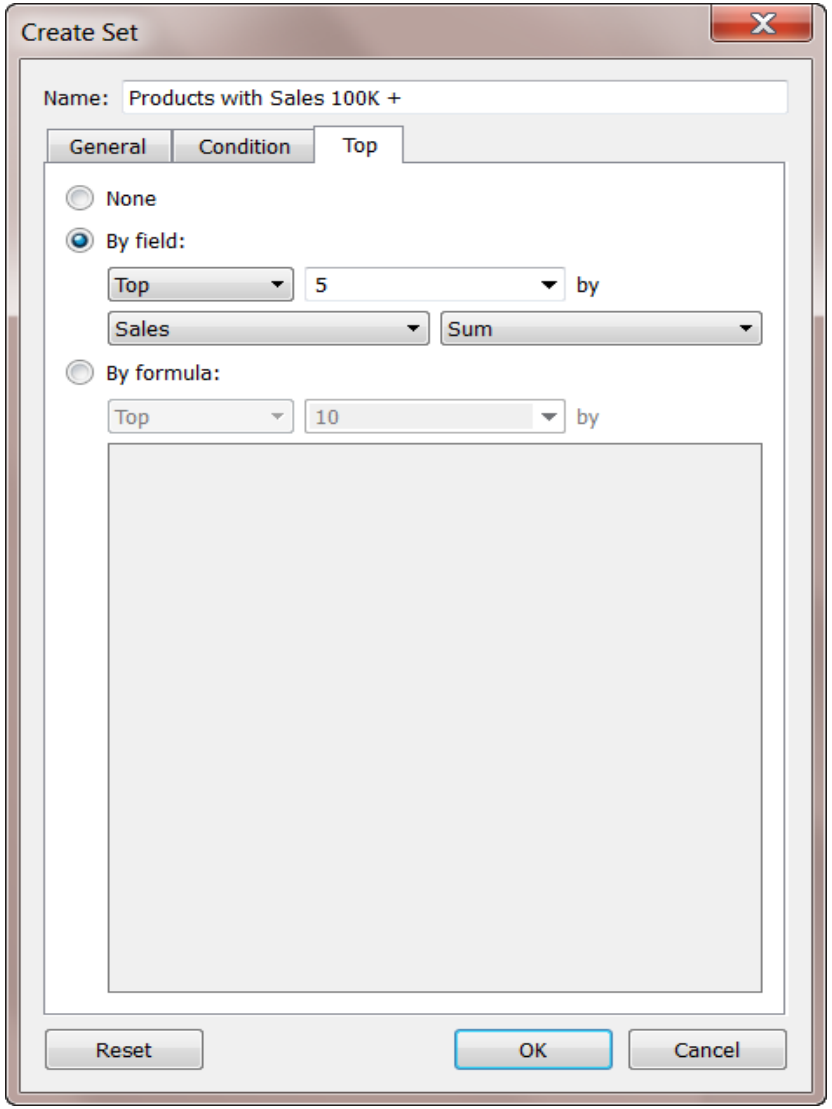
Create a dynamic set (contd.)

Top: Use the Top tab to define limits on what members to include in the set.

For example, you might specify a limit that is based on total sales that only includes the top 5 products based on their sales.

When finished, click **OK**.

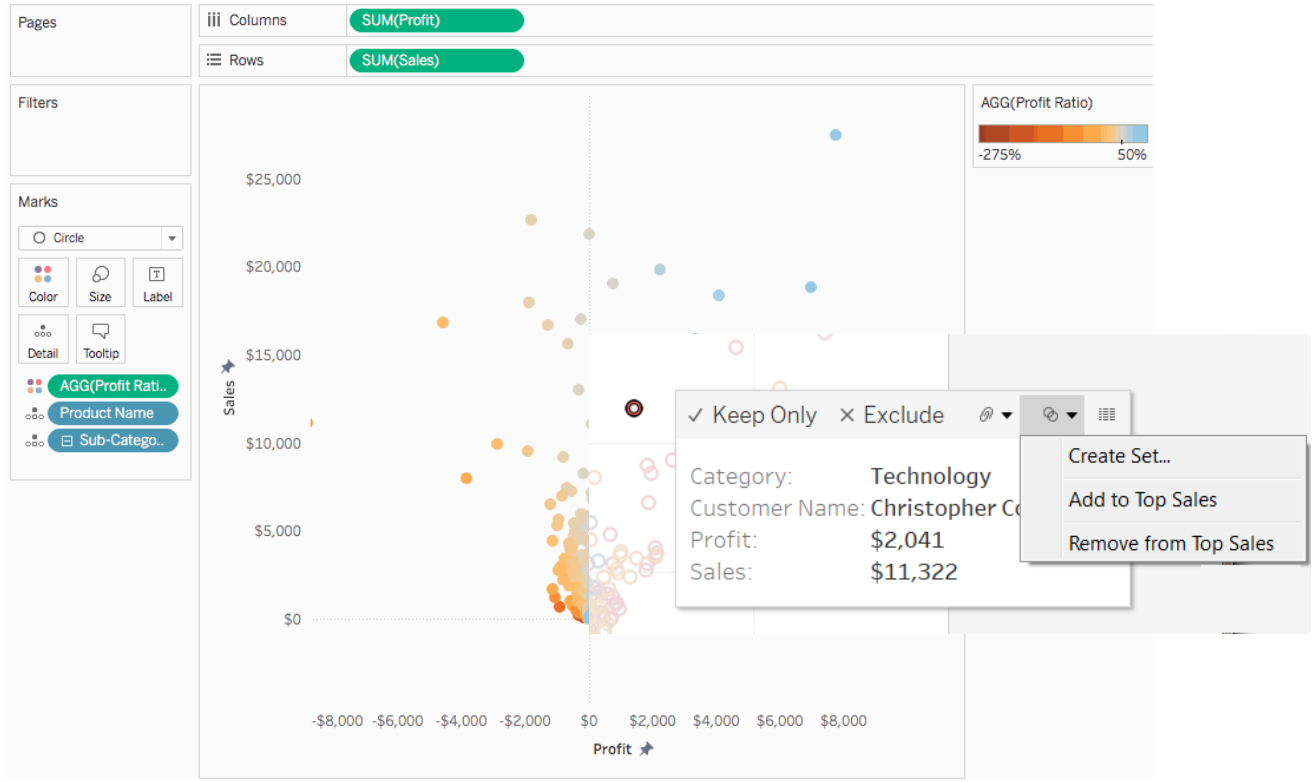
The new set is added to the bottom of the Data pane, under the Sets section. A set icon indicates the field is a set.



Create a fixed set

The members of a fixed set do not change, even if the underlying data changes. A fixed set can be based on a single dimension or multiple dimensions.
To create a fixed set:

In the visualization, select one or more marks (or headers) in the view.
Right-click the mark(s) and select **Create Set**.



Combine sets

To combine sets:

- select the two sets
- Right-click the sets and select **Create Combined Set**.
- Type a name for the new combined set.
    1. **All Members in Both Sets** - the combined set will contain all of the members from both sets.
    2. **Shared Members in Both Sets** - the combined set will only contain members that exist in both sets.
    3. **Except Shared Members** - the combined set will contain all members from the specified set that don't exist in the second set.
- Click Ok.

Difference between Group and Set

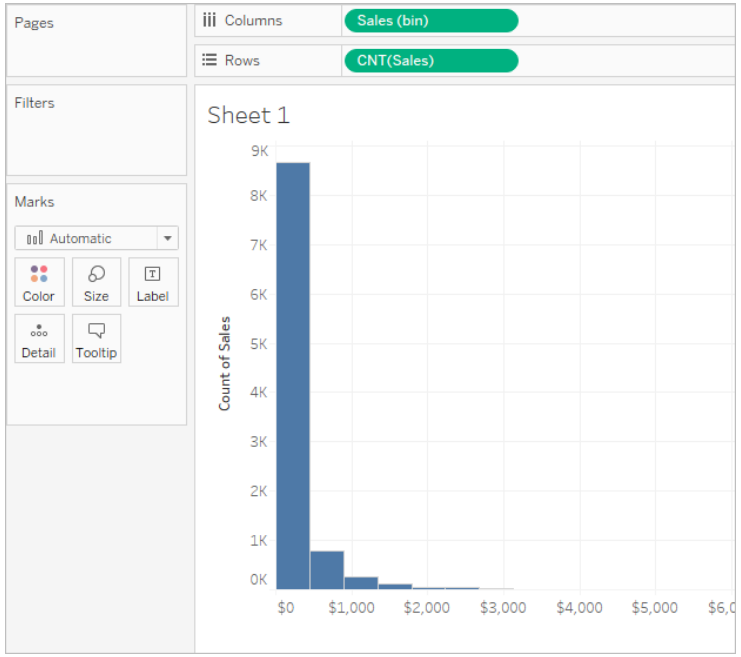
Group	Set
Fixed (Manual)	Fixed (Manual) or Dynamic
Single label	In/Out
Dimension/Measure	Dimension
Can be basis of other group	Can be basis of other set

Bins

You can bin data only for relational data sources and binned fields cannot be used in calculations.

Create a Histogram from a Binned Dimension

- Click the **Sales (bin)** dimension in the Data pane and choose **Convert to continuous**.
- Drag the **Sales (bin)** dimension from the Data pane and drop it on the **Columns** shelf.
- Drag the original **Sales** field from the Measures area of the Data pane and drop it on the **Rows** shelf.
- Click **SUM(Sales)** on **Rows** and change the aggregation from Sum to Count.



Hierarches

When you connect to a data source, Tableau automatically separates date fields into hierarchies

e.g. Region, State, and County, postal code

Create a hierarchy

- In the **Data** pane, drag a field and drop it directly on top of another field.
- When prompted, enter a name for the hierarchy and click **OK**.
- Drag additional fields into the hierarchy as needed.

Thank You