

# Sorting Columns

By default the order of the fields we get in Tableau is same as it is in the data source. These fields can be sorted using the sort filed option.

Tableau - Book1 - Tableau license expires today

File Data Server Window Help

Connections: Sample - Superstore (Excel)

Sheets: Orders, People, Returns, New Union

Orders (Sample - Superstore)

Connection: Live (selected), Extract

Filters: 0 | Add

Sort fields: Data source order (selected)

Options: Show aliases, Show hidden fields, 1,000 rows

# Orders Row ID	Abc Orders Order ID	Abc Orders Ship Date	Abc Orders Ship Mode	Abc Orders Customer ID	Abc Orders Customer Name	Abc Orders Segment	Abc Orders Country	
1	CA-2016-152156	11/8/2016	11/11/2016	Second Class	CG-12520	Claire Gute	Consumer	United States
2	CA-2016-152156	11/8/2016	11/11/2016	Second Class	CG-12520	Claire Gute	Consumer	United States
3	CA-2016-138688	6/12/2016	6/16/2016	Second Class	DV-13045	Darrin Van Huff	Corporate	United States
4	US-2015-108966	10/11/2015	10/18/2015	Standard Class	SO-20335	Sean O'Donnell	Consumer	United States
5	US-2015-108966	10/11/2015	10/18/2015	Standard Class	SO-20335	Sean O'Donnell	Consumer	United States
6	CA-2014-115812	6/9/2014	6/14/2014	Standard Class	BH-11710	Brosina Hoffman	Consumer	United States
7	CA-2014-115812	6/9/2014	6/14/2014	Standard Class	BH-11710	Brosina Hoffman	Consumer	United States
8	CA-2014-115812	6/9/2014	6/14/2014	Standard Class	BH-11710	Brosina Hoffman	Consumer	United States

Go to Worksheet

Data Source Sheet1

# Sorting Rows/Data

To arrange the data in ascending or descending order we need to click on small icon with the field name

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File Data Server Window Help

Connections [Add](#)

Sample - Superstore  
Excel

Sheets

- Orders
- People
- Returns
- New Union

Orders (Sample - Superstore)

Connection ☒ Live ☐ Extract

Orders

Sort fields Data source order

☐ Show aliases ☐ Show hidden

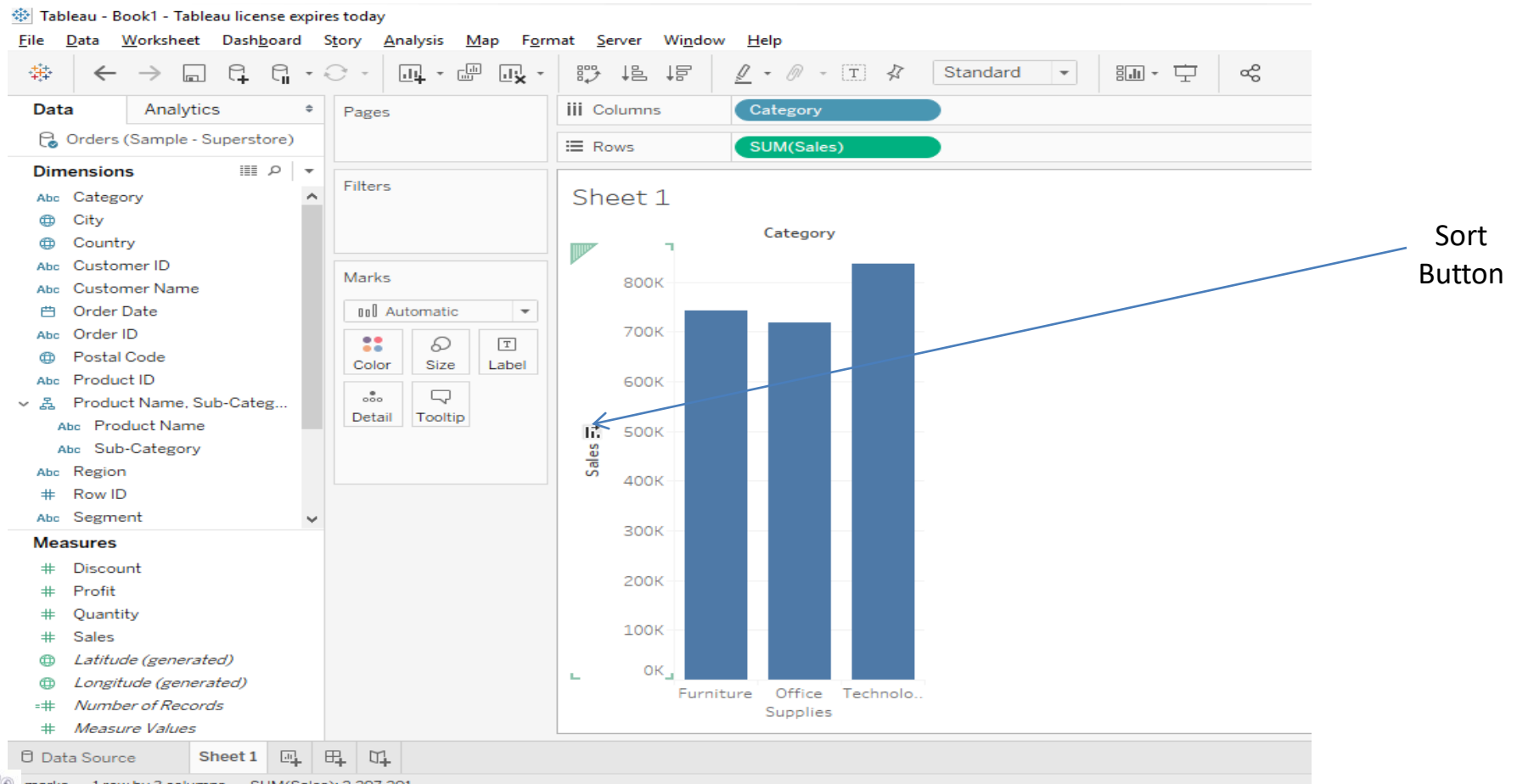
# Orders Row ID	Abc Orders Order ID	Orders Order Date	Orders Ship Date	Abc Orders Ship Mode	Abc Orders Customer ID	Abc Orders Customer Name	Abc Orders Segment
1	CA-2016-152156	11/8/2016	11/11/2016	Second Class	CG-12520	Claire Gute	Consumer
2	CA-2016-152156	11/8/2016	11/11/2016	Second Class	CG-12520	Claire Gute	Consumer
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7	CA-2014-115812	6/9/2014	6/14/2014	Standard Class	BH-11710	Brosina Hoffman	Consumer
8	CA-2014-115812	6/9/2014	6/14/2014	Standard Class	BH-11710	Brosina Hoffman	Consumer

Go to Worksheet

Data Source Sheet1

# Sorting Rows/Data

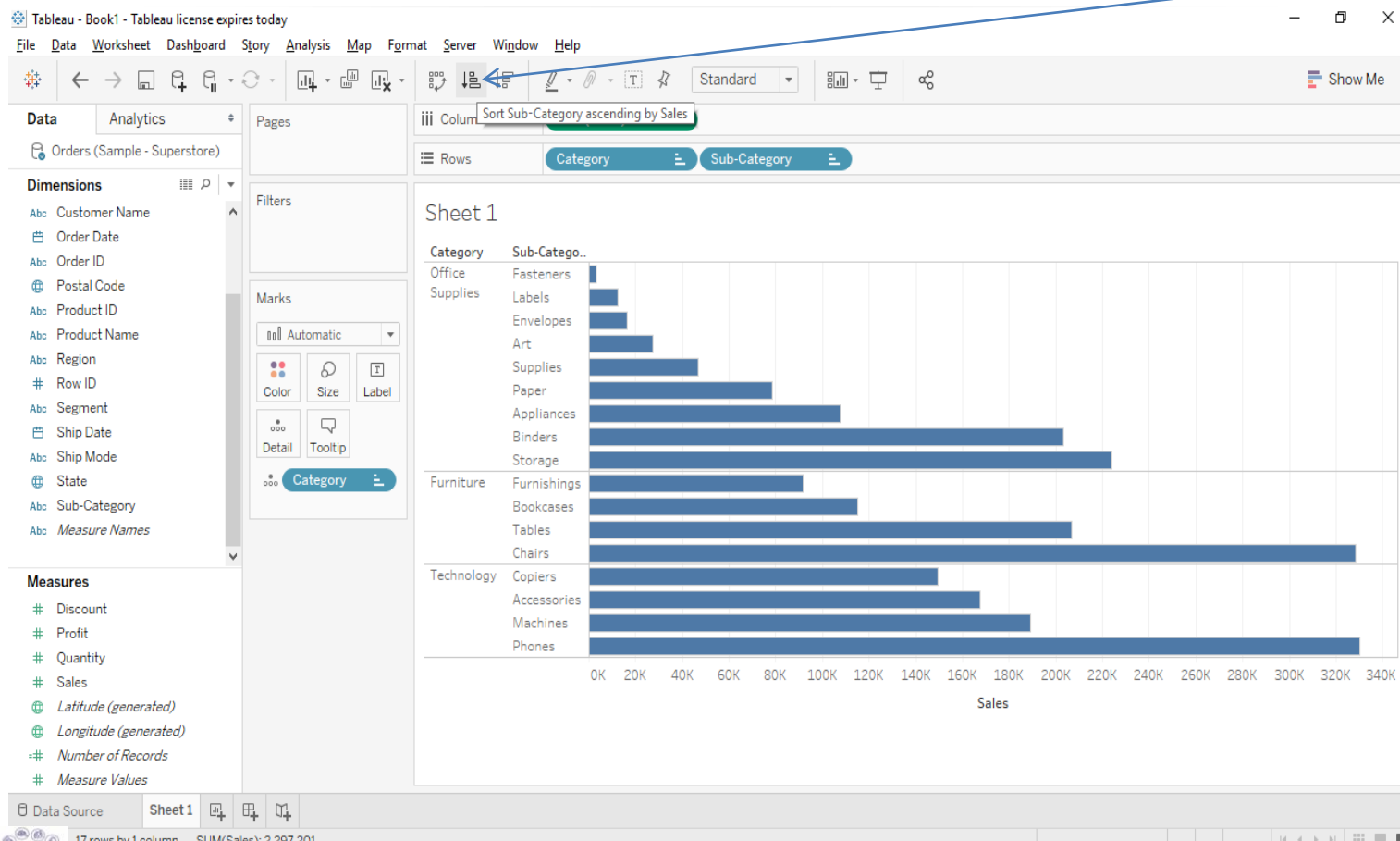
Quick Sort : The quick sort button enables us to sort the graph in ascending or descending order.



# Sorting Rows/Data

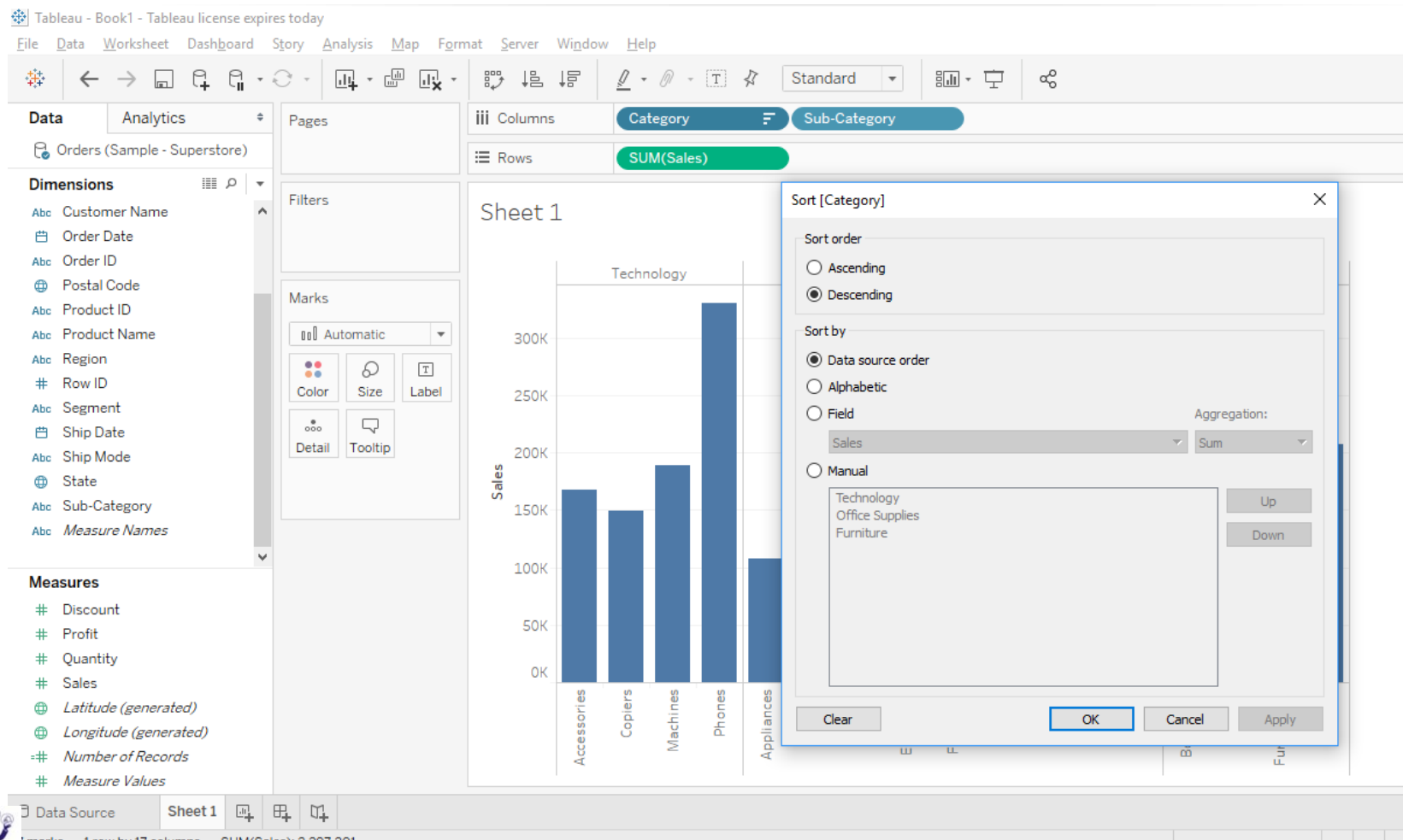
Toolbar Sort : To sort through toolbar we need to select the respective pill and click on the sort button.

Sort  
Buttons



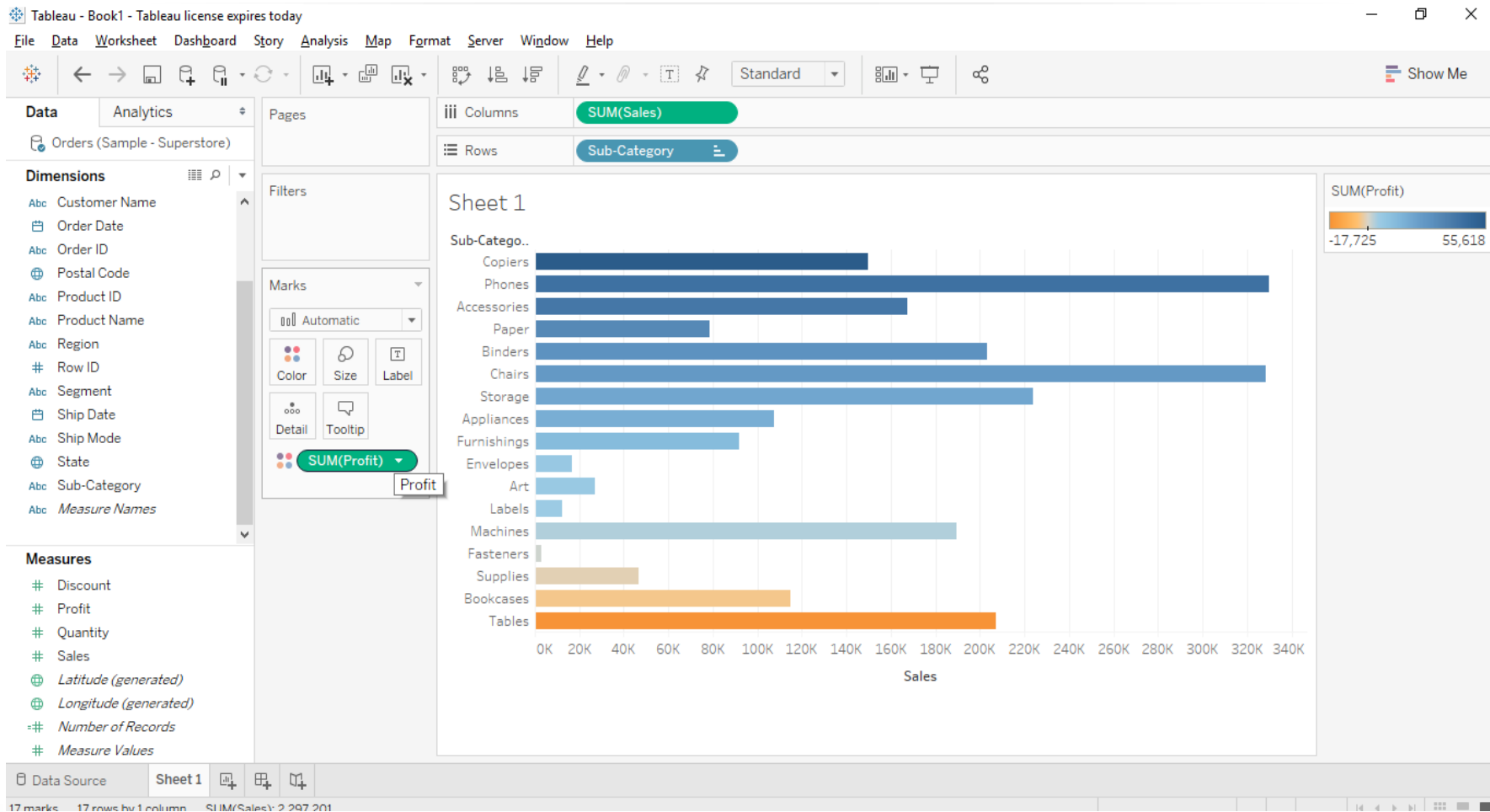
# Sorting Rows/Data

Sorting By Pills : This gives us few advance options.



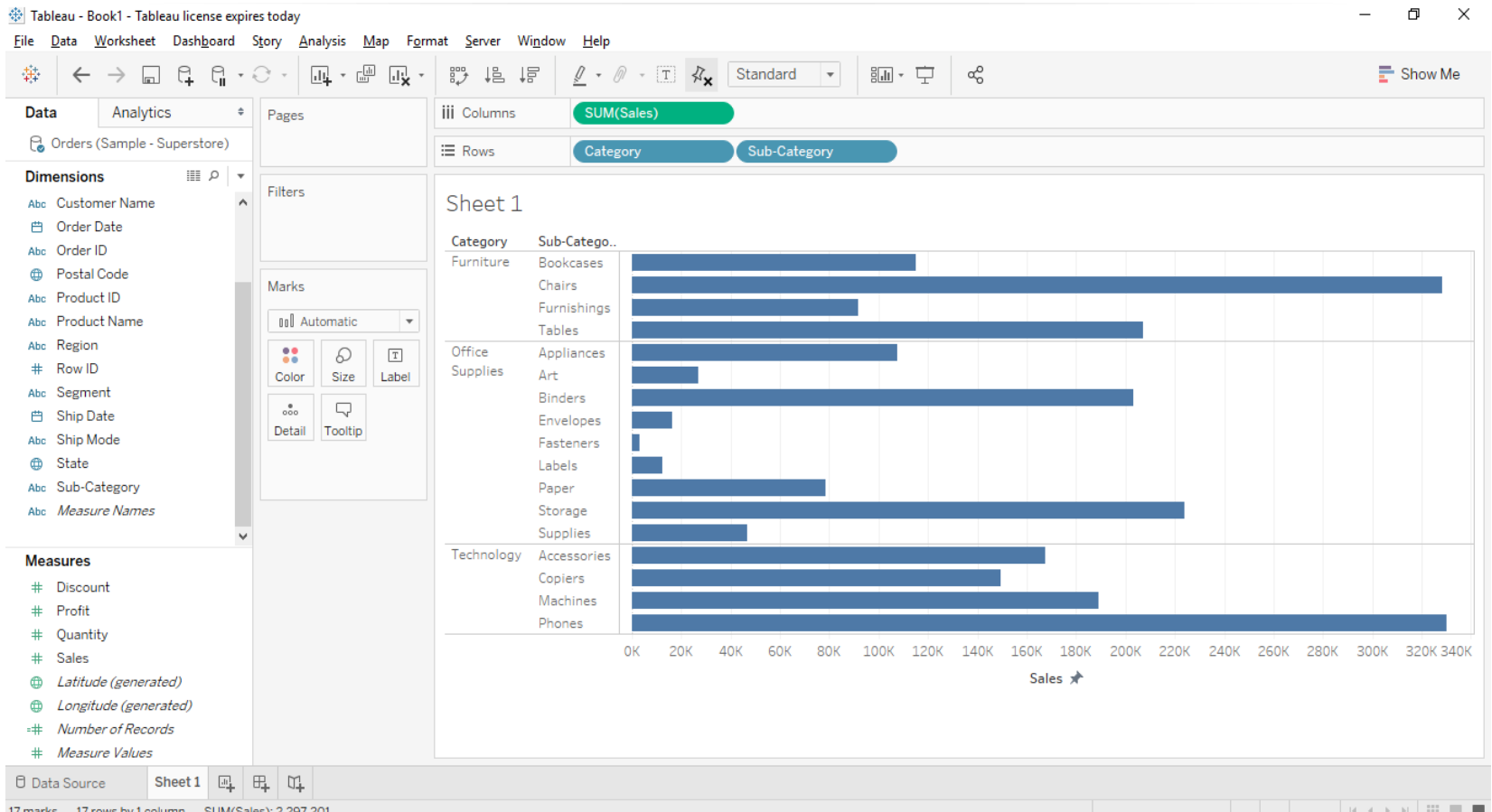
# Sorting Rows/Data

## Sorting By Marks Card



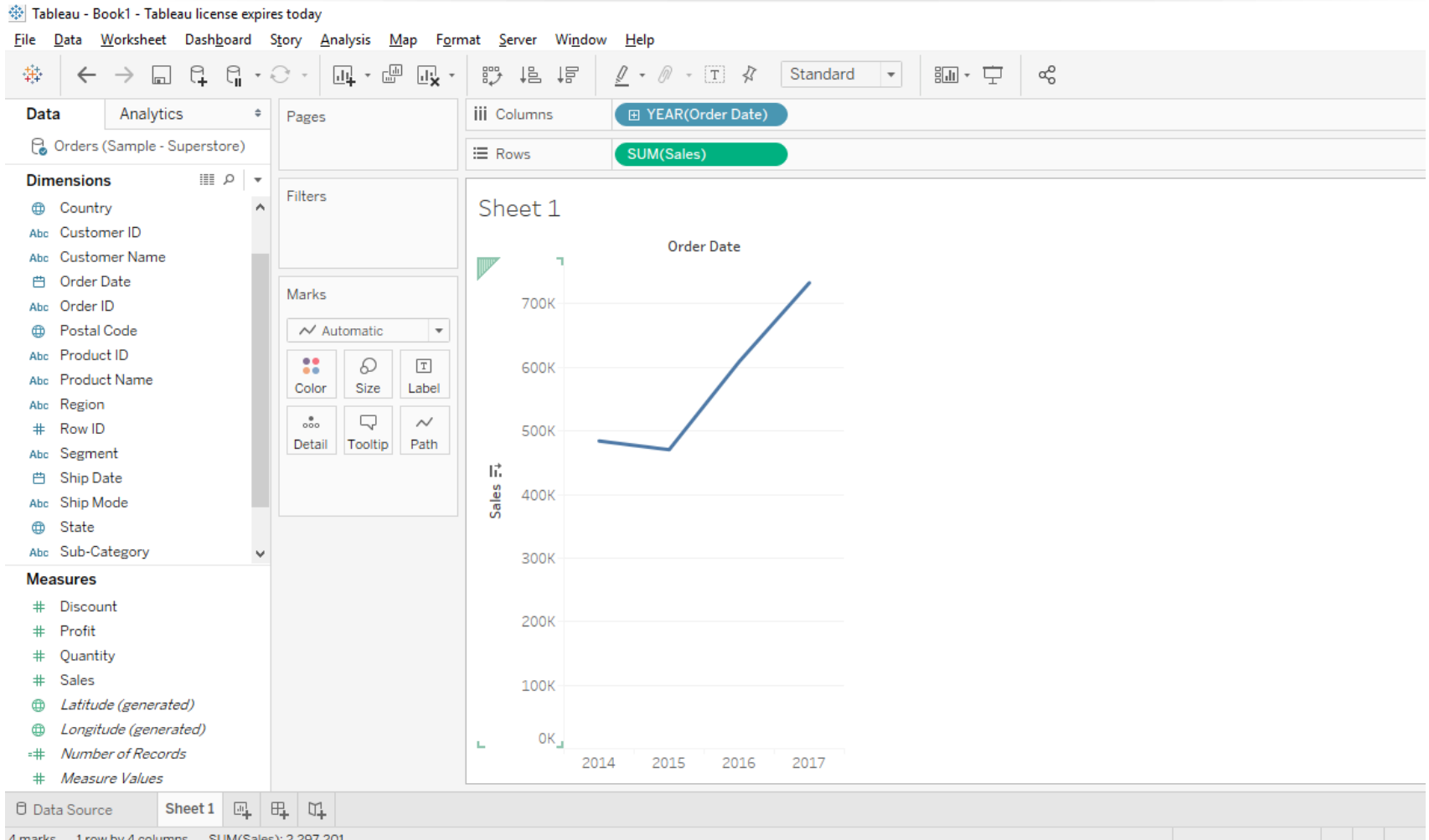
# Creating Hierarchy

We can create the hierarchy of fields by dropping one field into another.



# Auto Hierarchy

Tableau create the auto hierarchy for date fields

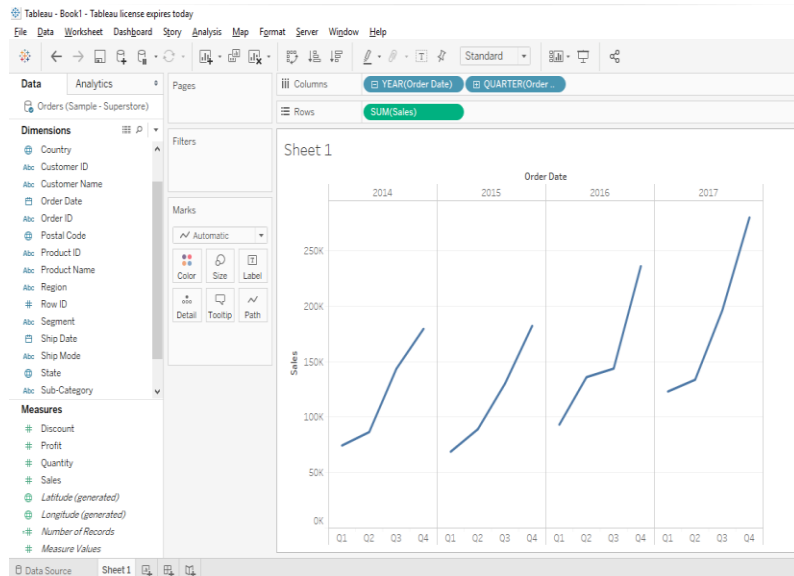




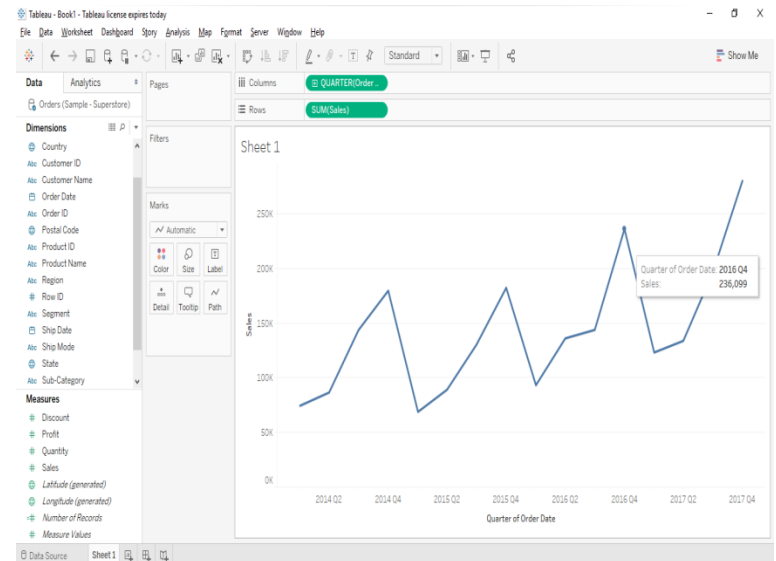
# Auto Hierarchy

Auto hierarchy can be displayed using

1. Discrete
2. Continuous Graphs



Discrete Graph



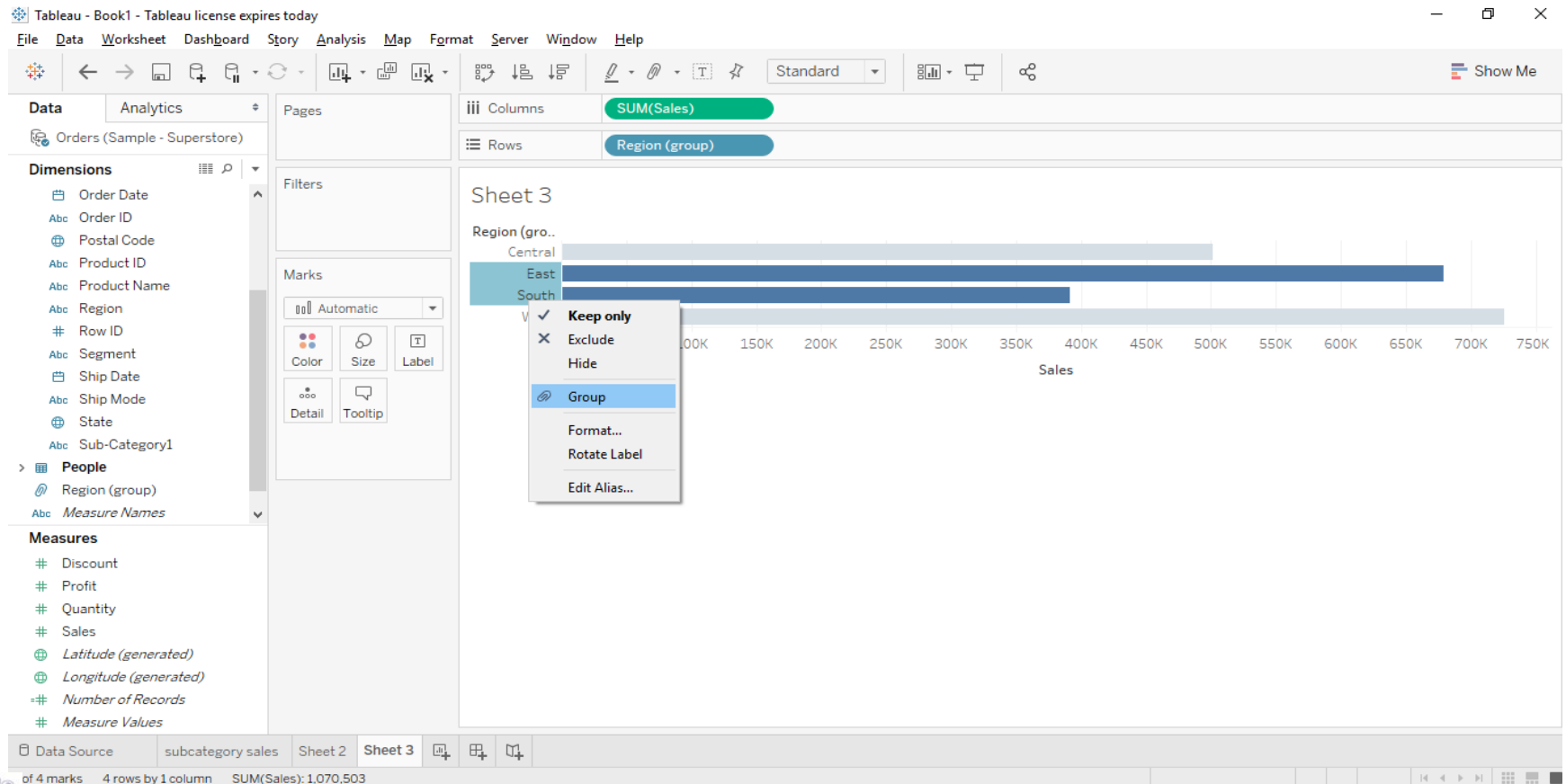
Continuous Graph

To remove the hierarchy Right click on the hierarchy and select Remove hierarchy



# Grouping

Tableau also allows us to compare the one particular segment with rest of the segments by grouping the other segments as one.



# Grouping Through Data Pane

In the data pane right click on the dimension on which we need to create a group and select create group.

The screenshot shows the Tableau Desktop interface with a horizontal bar chart titled 'Sheet 3'. The chart displays 'SUM(Sales)' on the y-axis and 'Sub-Category1' on the x-axis. The 'Data' pane on the left shows the 'Dimensions' list with 'Sub-Category1' selected. A 'Create Group [Sub-Category1]' dialog box is open, showing a list of sub-categories: Accessories, Appliances, Art, Binders, Bookcases, Chairs, Copiers, Envelopes, Fasteners, Furnishings, Labels, Machines, Paper, Phones, and Storage. The 'Field Name' is 'Sub-Category1 (group)' and the 'Groups' list is empty. The 'Show Add Location' checkbox is checked. The 'OK' button is highlighted.

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File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Data Analytics

Orders (Sample - Superstore)

Dimensions

- Order Date
- Order ID
- Postal Code
- Product ID
- Product Name
- Region
- Row ID
- Segment
- Ship Date
- Ship Mode
- State
- Sub-Category1

People

- Measure Names

Measures

- Discount
- Profit
- Quantity
- Sales
- Latitude (generated)
- Longitude (generated)
- Number of Records
- Measure Values

Columns: SUM(Sales)

Rows: Sub-Category1

Sheet 3

Sub-Category1

Accessories

Appliances

Art

Binders

Bookcases

Chairs

Copiers

Envelopes

Fasteners

Furnishings

Labels

Machines

Paper

Phones

Storage

Tables

0K 20K 40K 60K 80K

Sales

Create Group [Sub-Category1]

Field Name: Sub-Category1 (group)

Groups: Add to:

- Accessories
- Appliances
- Art
- Binders
- Bookcases
- Chairs
- Copiers
- Envelopes
- Fasteners
- Furnishings
- Labels
- Machines
- Paper
- Phones
- Storage

Group Rename Ungroup Show Add Location

Include 'Other' Find >>

Reset OK Cancel Apply

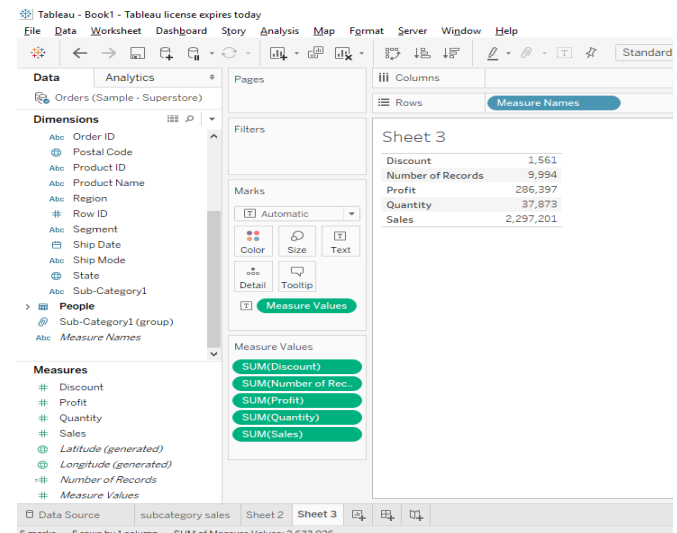
Data Source subcategory sales Sheet 2 Sheet 3

17 marks 17 rows by 1 column SUM(Sales): 2,297,201

# Auto Generated Fields

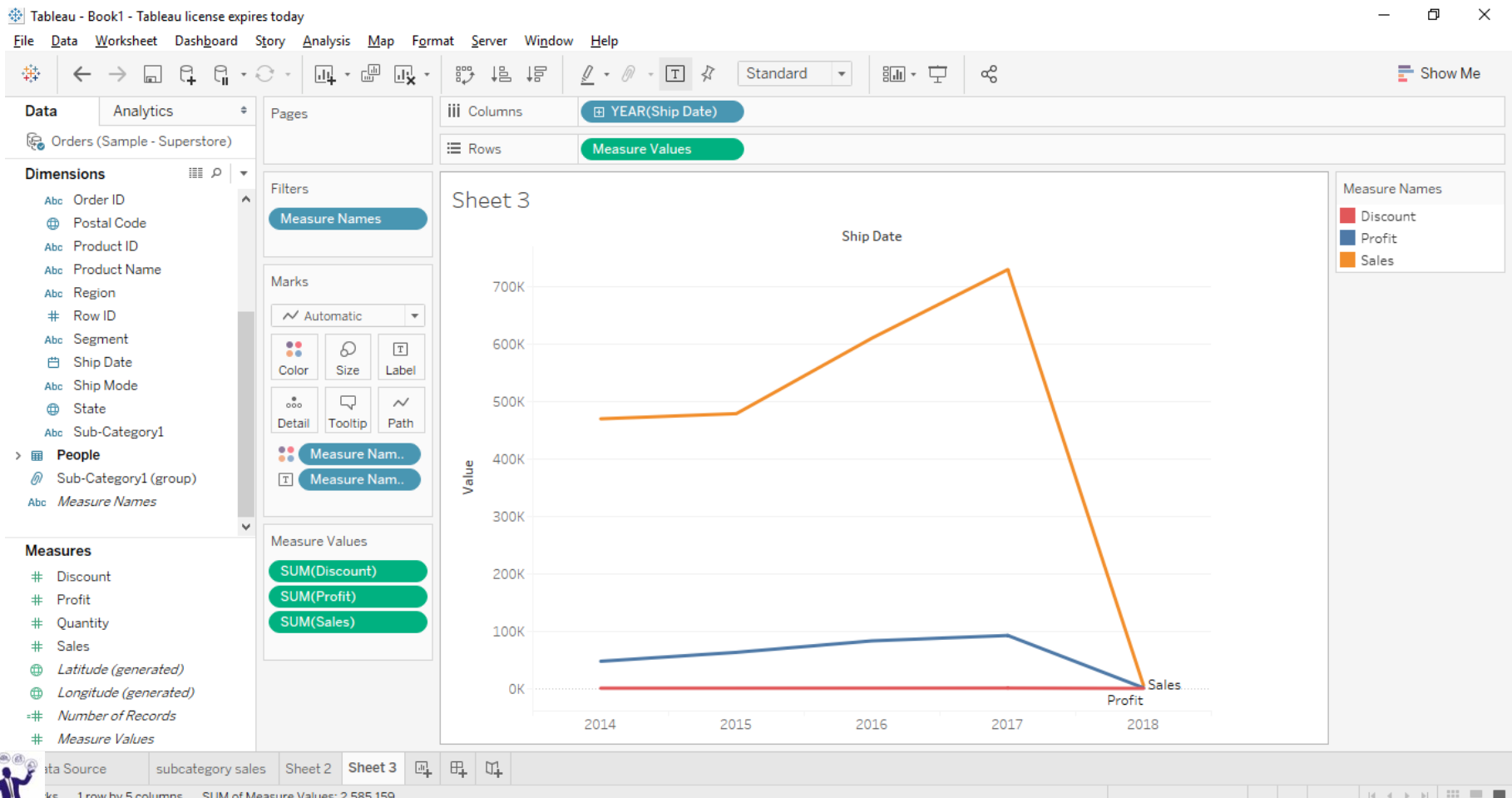
When connecting to the data source Tableau generates five fields:

1. *Number of Records* – Total no of records in data source.
2. *Longitude* – In maps
3. *Latitude* – In Maps
4. *Measure Value*
5. *Measure Name* – Summary of all numbers



# Utilizing Measure Name

Measure name can be utilized to display multiple measure value on the single graph.



# Discrete & Continuous Values

Discrete are the fields from the data source which have different values and Continuous are the fields which are aggregated.

Discrete- Highlighted in Blue

Continuous - Highlighted in Green

Discrete field gives separate colors

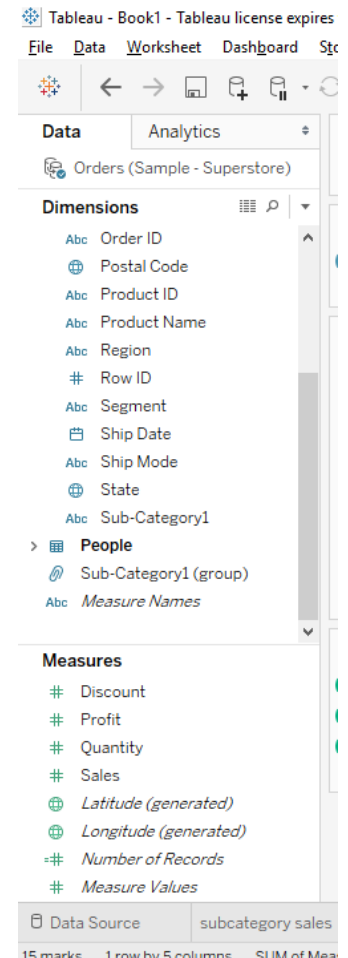
Continuous field gives gradient color.

Filtering on the Discrete field gives the exact values to filter.

Filtering on the Continuous field gives the range to filter.

Discrete field in maps gives colored dots (symbol graph)

Continuous field in maps gives filled maps (gradient color).



# ASSIGNMENT



A-1 Display year wise Sales, Discount, Profit & Quantity using Measures Names

A-2 Display Sales using Hierarchy for Region, Segment, Category, Subcategory

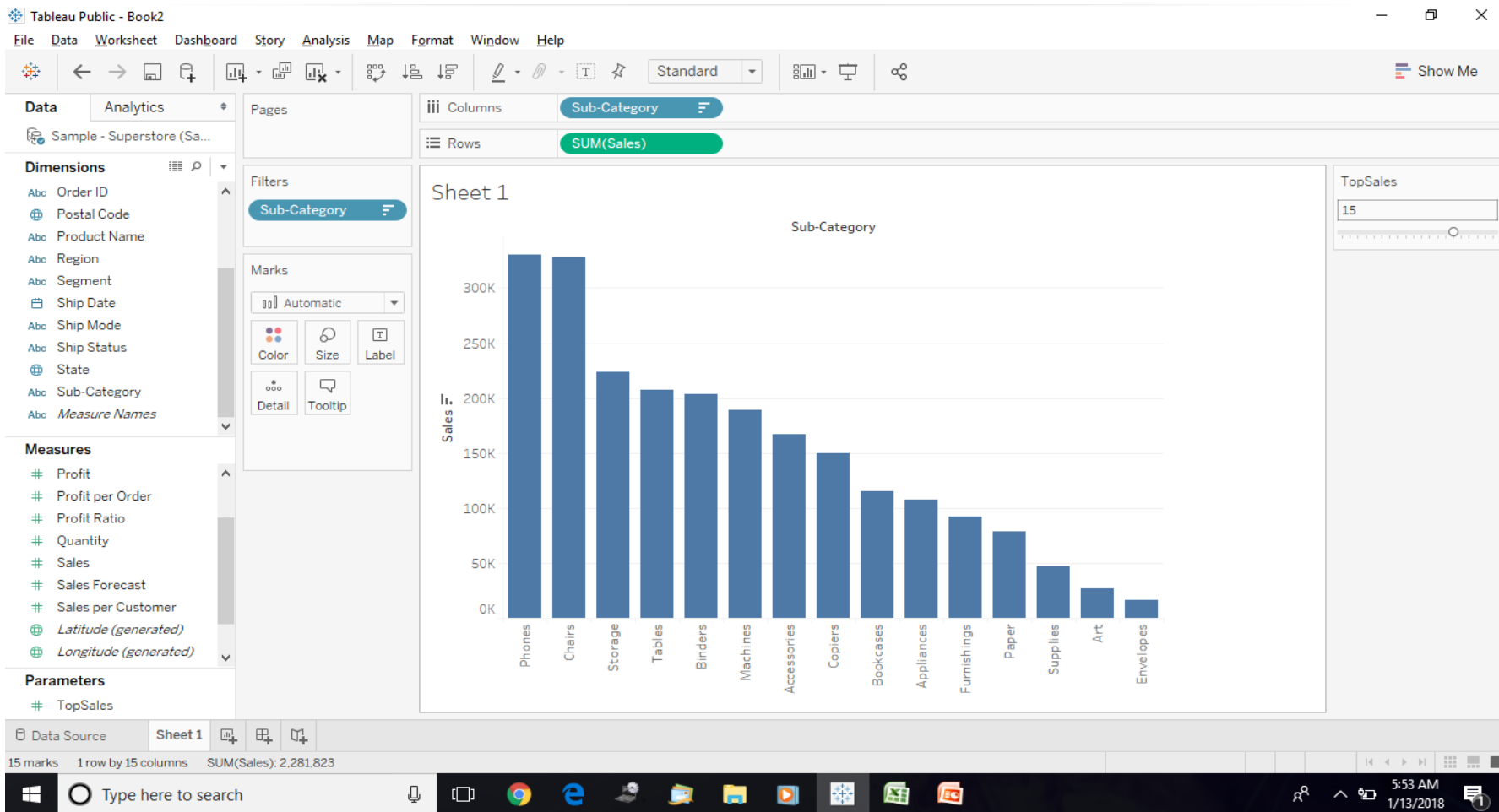
A-3 Create a horizontal Bar chart to represent subcategory sales, all stationary related subcategories like paper, label etc should be grouped as Stationary.

A-4 Represent Subcategory wise profit in graphical manner, arranged in the descending order of profit.



# Adding Parameters

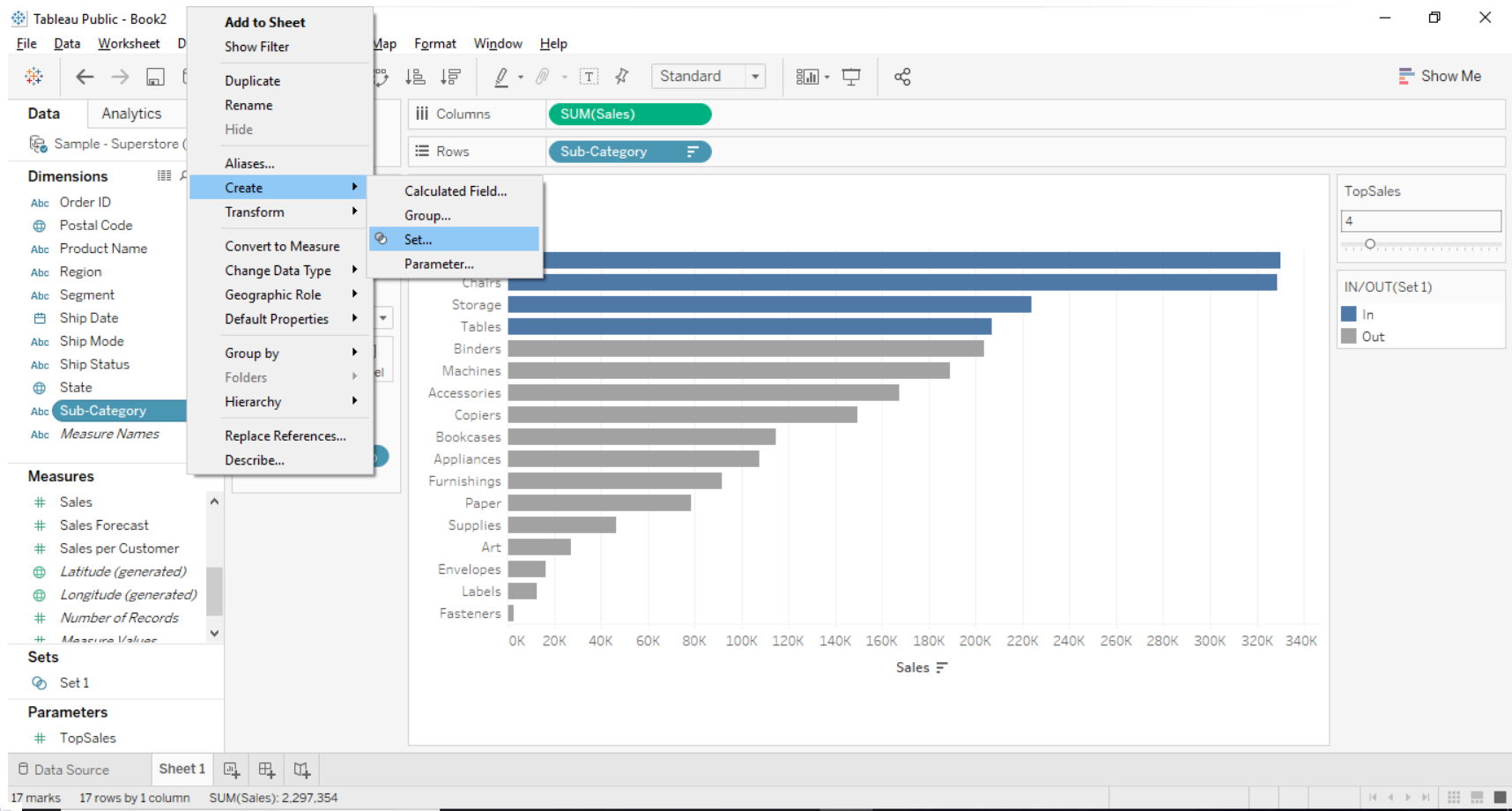
Parameters are the dynamic values that can replace the constant values in calculations or filters. We can make our chart dynamic by adding parameter to it. This will allow the user to manipulate the chart at runtime.





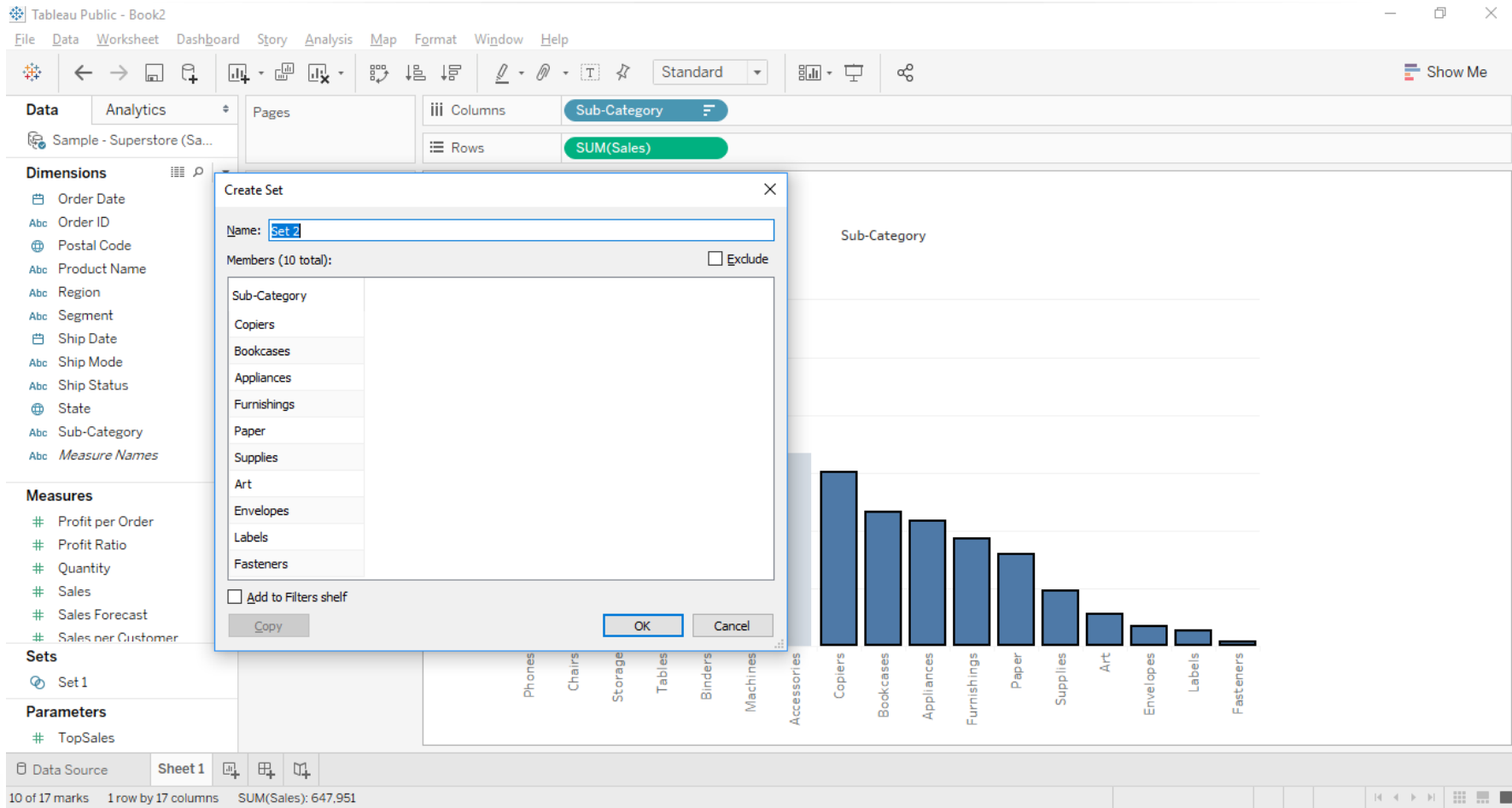
# Creating Sets

Set can be used to highlight the specific number of values in the chart.



# Creating Sets

The short cut method.



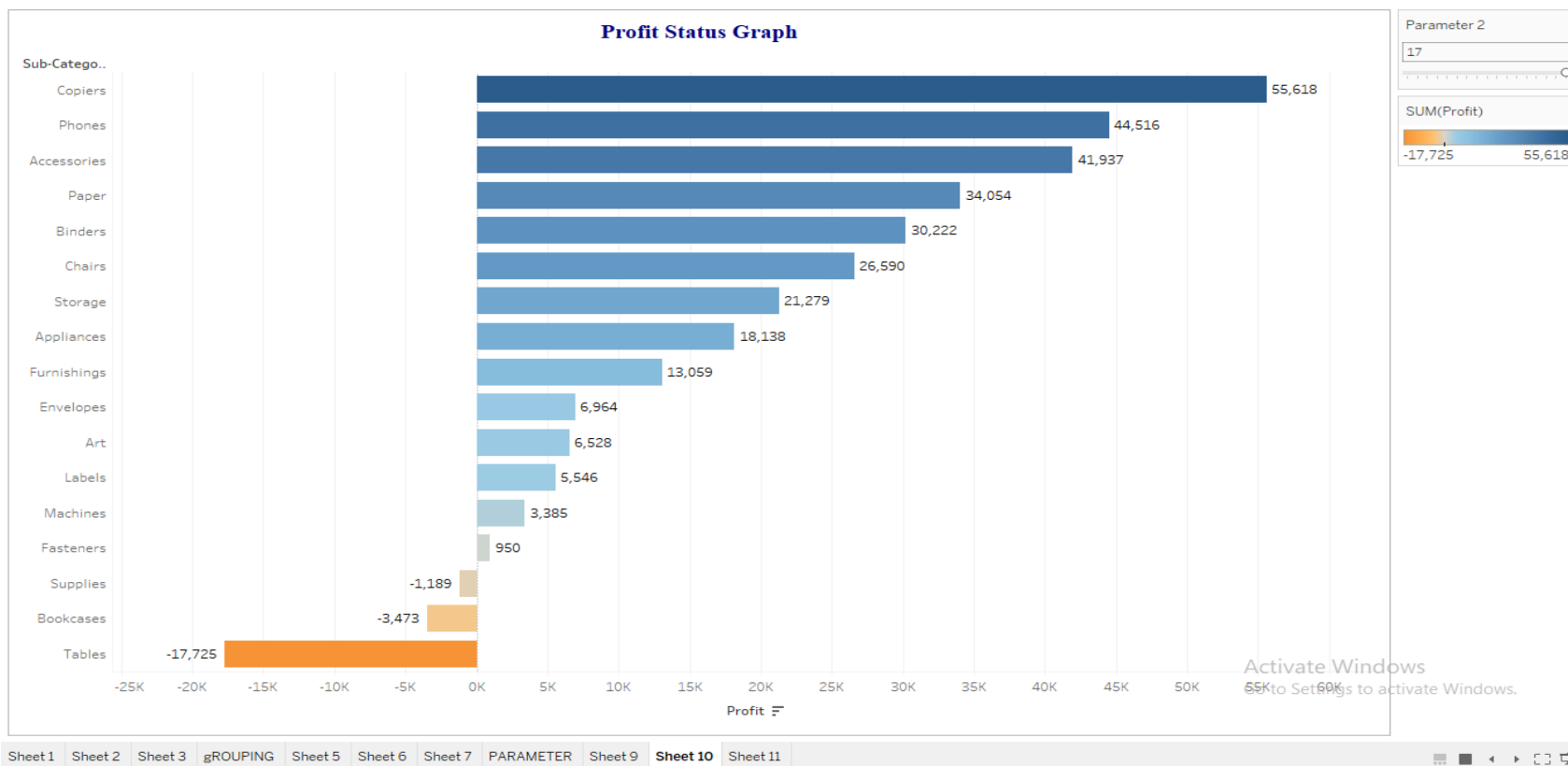
# ASSIGNMENT



A-1 Interactive Graph to highlight top 5 Profit generating categories —(Use Parameter)

A-2 Interactive category & subcategory wise sales - (using sets)

A-3 YEAR wise segment wise sales



# Using Combines

Combine allow us to do the collective analysis on fields.

Eg: Comparing Region wise, Category & Sub Category wise Sales.

Tableau Public - Book2

File Data Worksheet Dashboard Story Analysis Map Format Window Help

Data Analytics

Sample - Superstore (...)

Dimensions

- Order Date
- Order ID
- Postal Code
- Product Name
- Region
- Segment
- Ship Date
- Ship Mode
- Ship Status
- State
- Sub-Category
- Measure Names

Measures

- Sales
- Sales Forecast
- Sales per Customer
- Latitude (generated)
- Longitude (generated)
- Number of Records
- Measure Values

Sets

- Set1

Parameters

- TopSales

Columns

Rows

Category, Sub-Categ..

Sheet 1

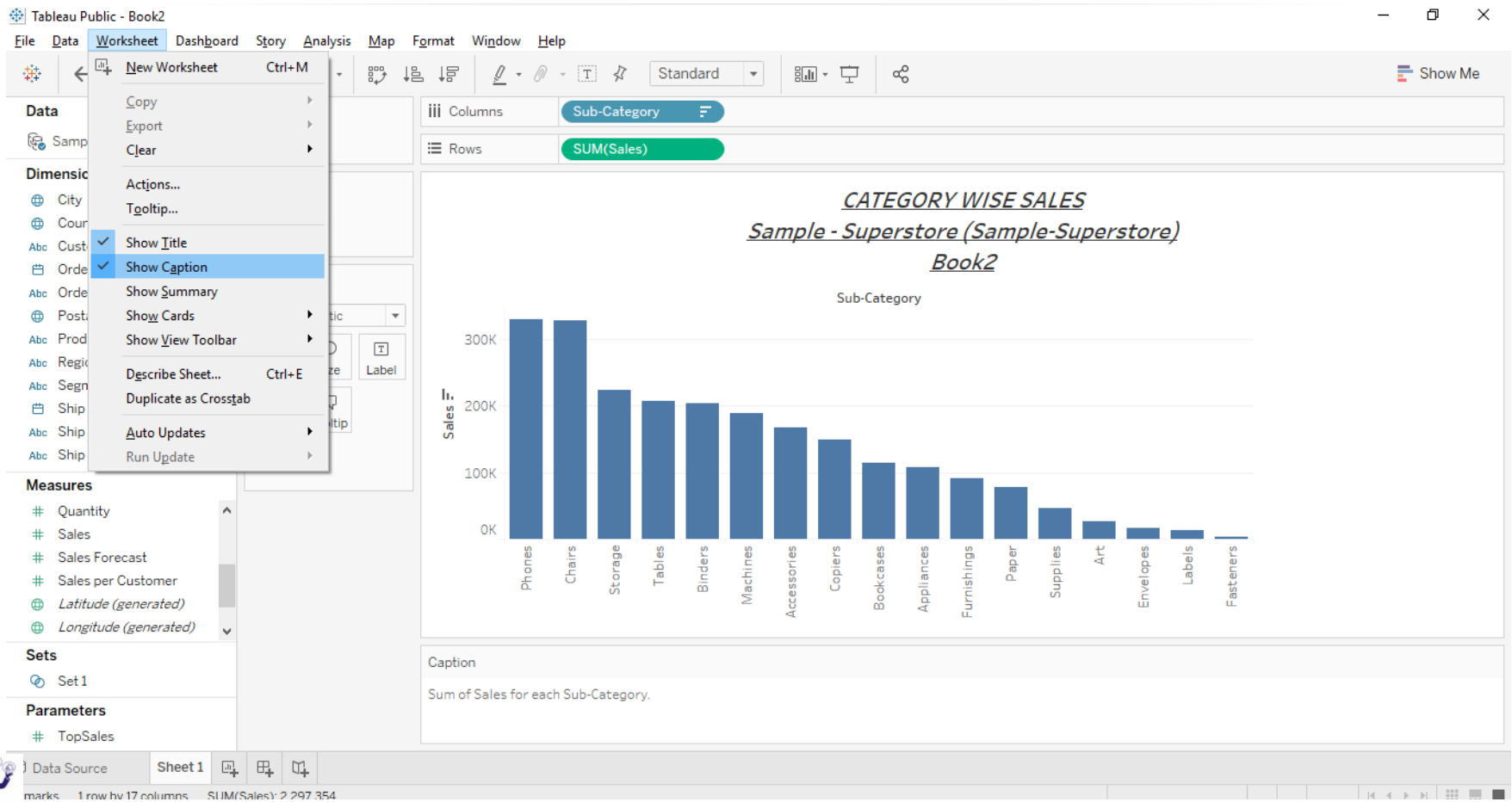
Category, Sub-Category, Region (Combined)

Furniture, Bookcases, Central	24,153
Furniture, Bookcases, East	43,819
Furniture, Bookcases, South	10,900
Furniture, Bookcases, West	36,007
Furniture, Chairs, Central	85,228
Furniture, Chairs, East	96,263
Furniture, Chairs, South	45,177
Furniture, Chairs, West	101,786
Furniture, Furnishings, Central	15,256
Furniture, Furnishings, East	29,067
Furniture, Furnishings, South	17,310
Furniture, Furnishings, West	30,072
Furniture, Tables, Central	39,152
Furniture, Tables, East	39,142
Furniture, Tables, South	43,919
Furniture, Tables, West	84,755
Office Supplies, Appliances, Central	23,582
Office Supplies, Appliances, East	34,191
Office Supplies, Appliances, South	19,525
Office Supplies, Appliances, West	30,240
Office Supplies, Art, Central	5,763
Office Supplies, Art, East	7,498



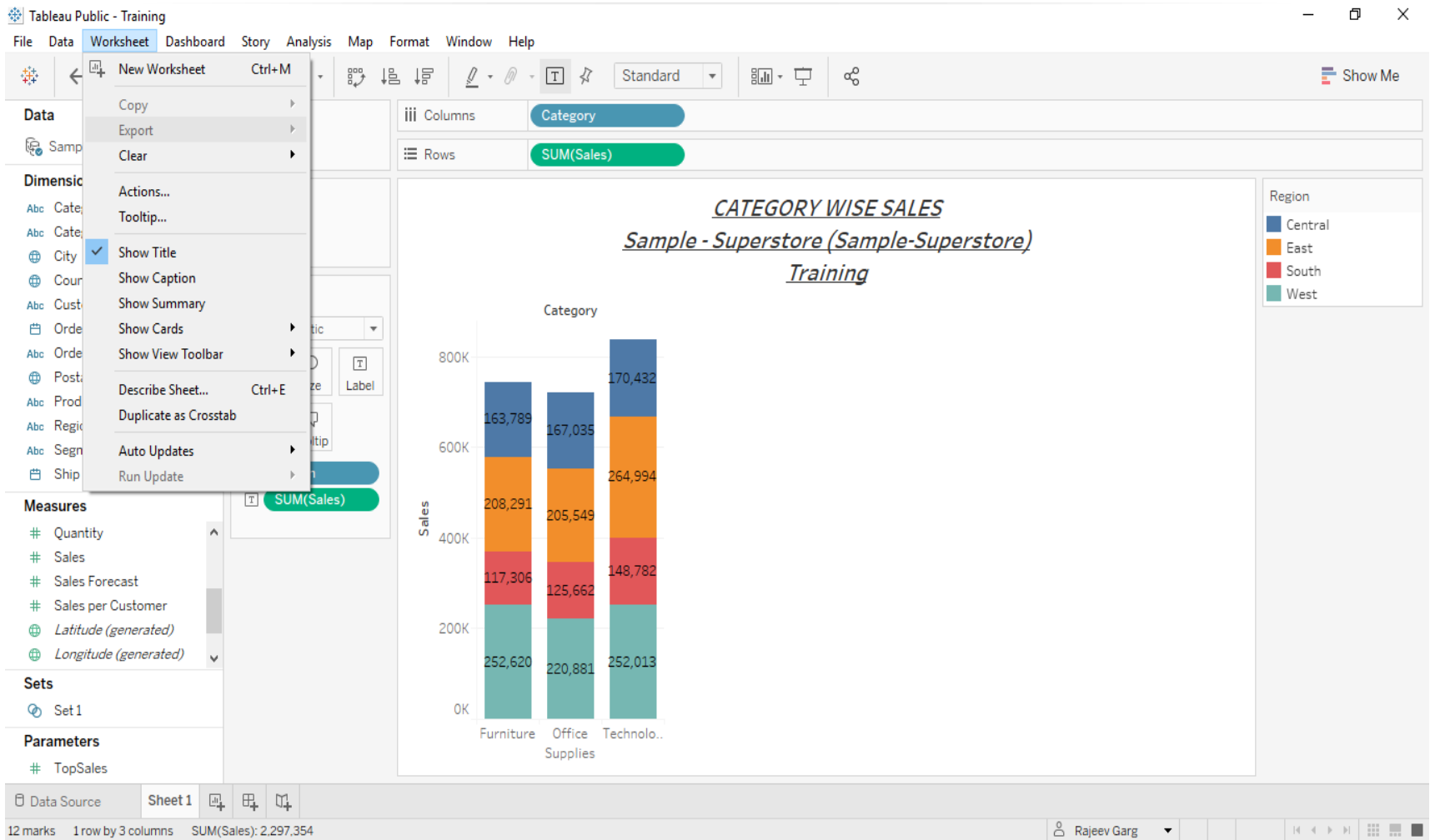
# Titles & Captions

By Default Tableau displays the sheet name as the chart title. We can edit this and provide more appropriate title. Also Tableau allows us the format these titles by using simple formatting options.



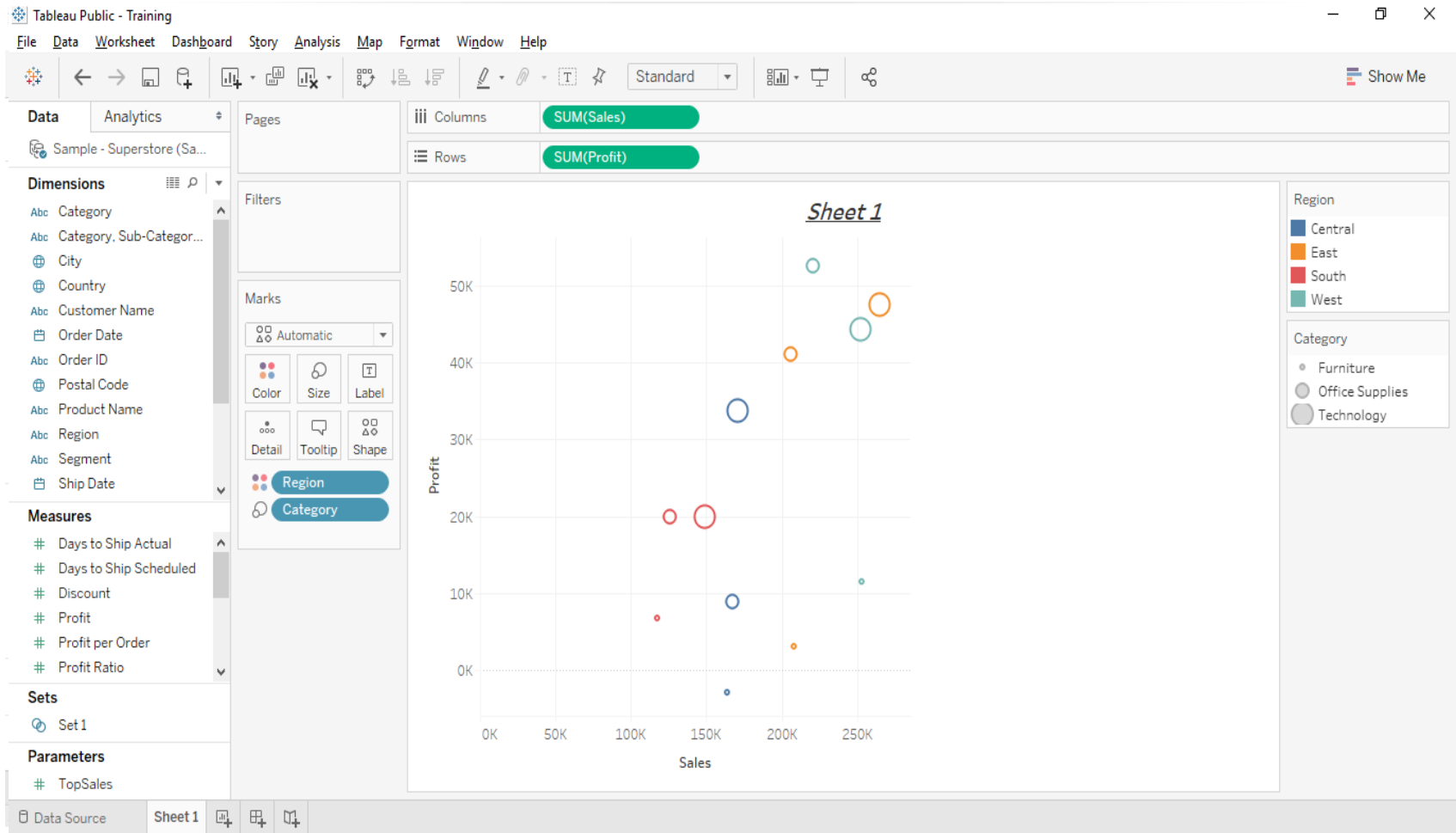
# Exporting Data

Tableau data can be exported to various destinations like PDF, Excel, PowerPoint, Access, word, etc.



# Granularity

Granularity means breaking down the data.



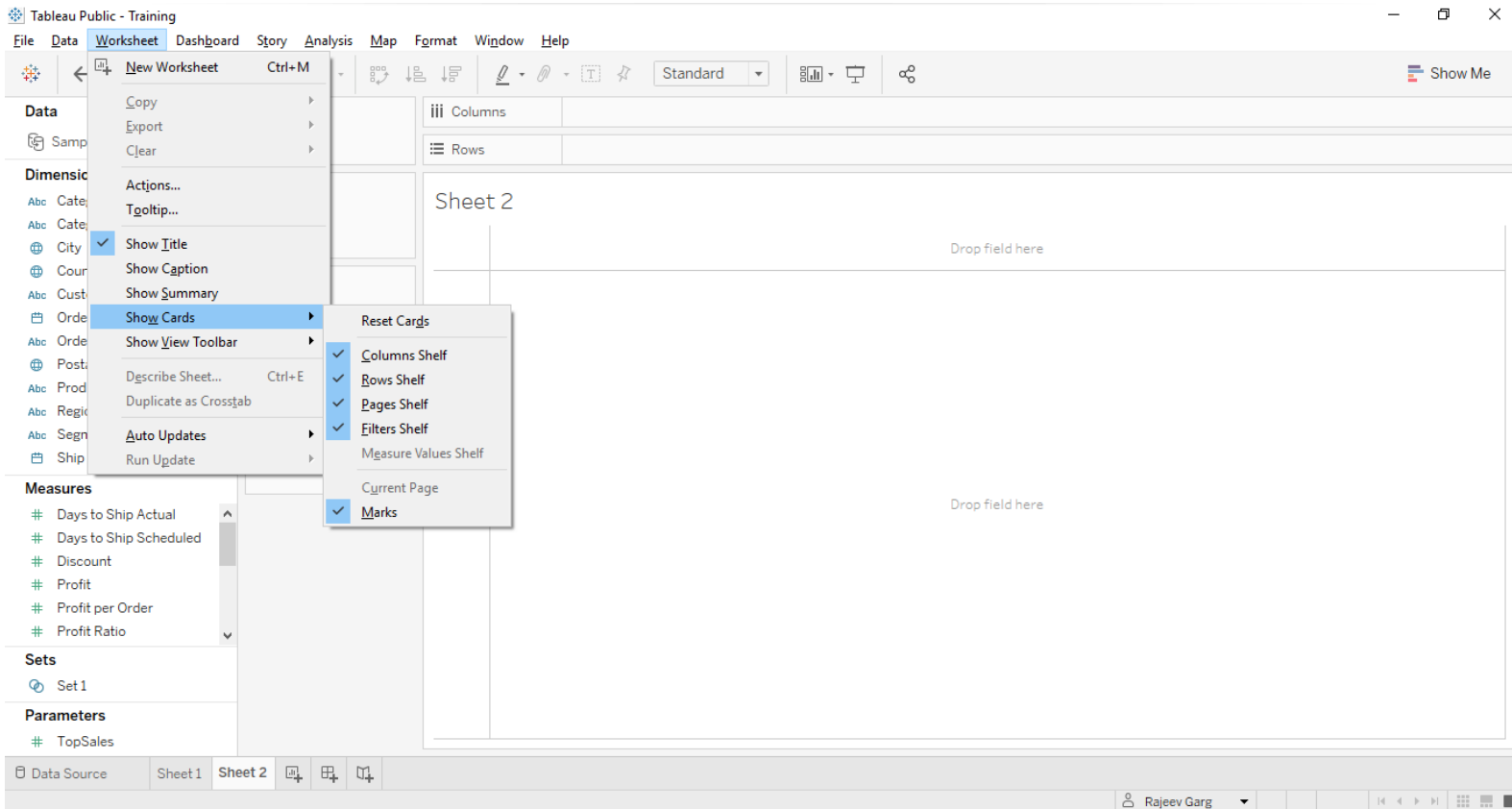
# Cards & Shelf

The various sections of Tableau worksheet are known as cards.

Marks Card, Page Card, Filter Card, Row Card, Column Card.

The place in front of column & row card is known as Shelf.

These cards can be manipulated through Worksheet menu.





# Managing Metadata

Managing metadata means :

1. Hiding a Field
2. Renaming a Field
3. Creating Hierarchies / Auto Hierarchies
4. Create folder – easier navigation through fields.
5. Creating a Calculated field



# ASSIGNMENT



Display Sales on the Basis of Region, Category, Subcategory.  
Should be Interactive on Region with Dynamic Title & Caption.

All the fields related to customer should be in the Customer folder & product related fields in Products folder

Segment wise monthly cost on the basis of shipping date

Display sales value using a combined field for Region, Segment Category

