

Transforming Your Data



Adam Crahen

HEAD OF DATA VISUALIZATION ENGINEERING | PLURALSIGHT
2018 TABLEAU ZEN MASTER

@acrahen thedataduo.com



Overview

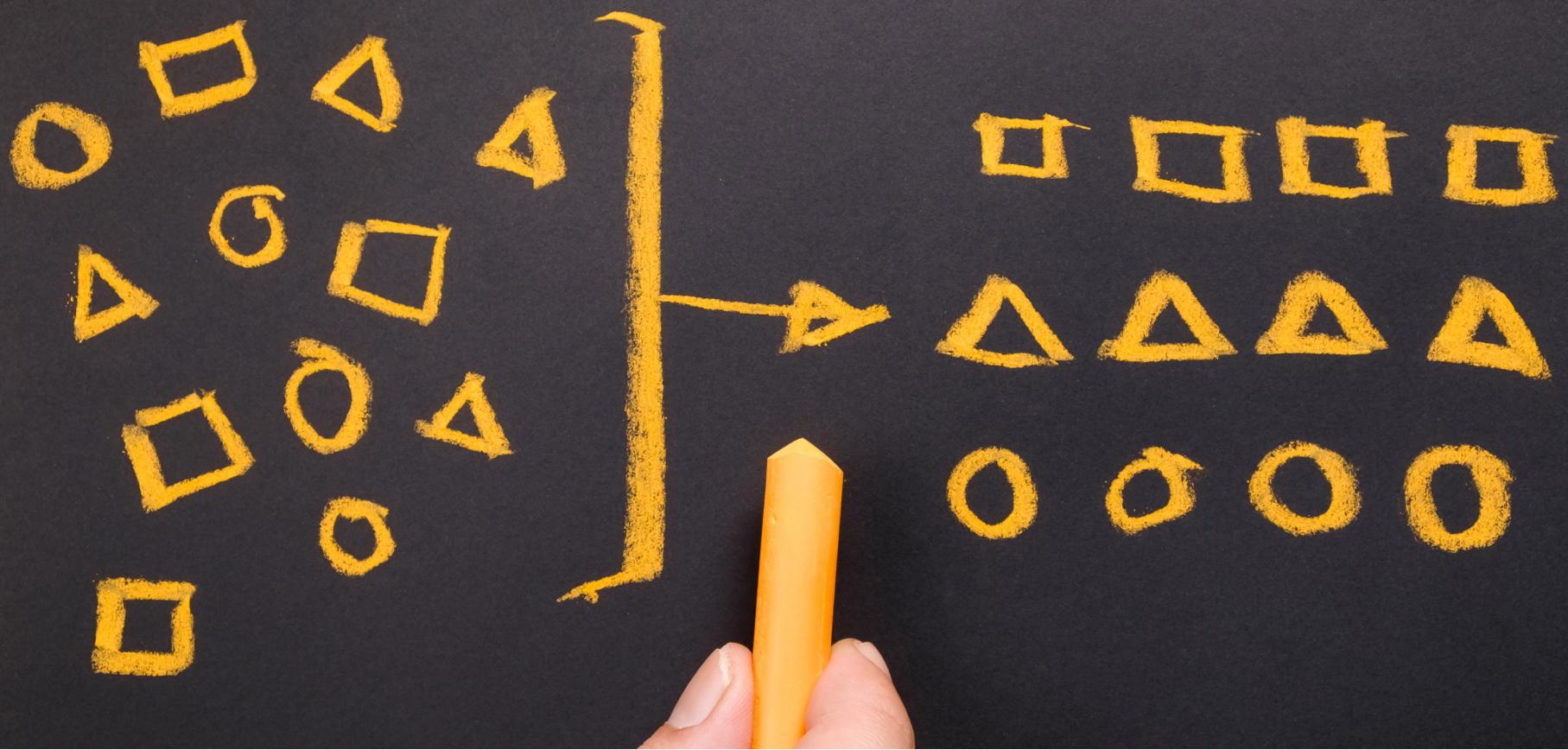


Transforming Your Data

- Sorting Fields
- Creating Groups
- Creating Sets
- Creating Hierarchies

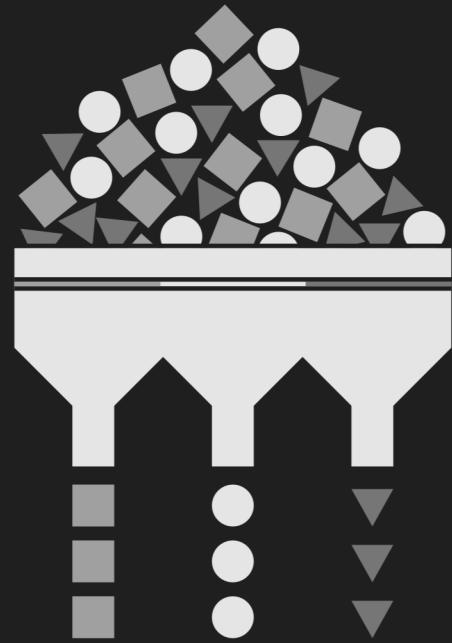


Transform



Sorting Fields





What is sorting?

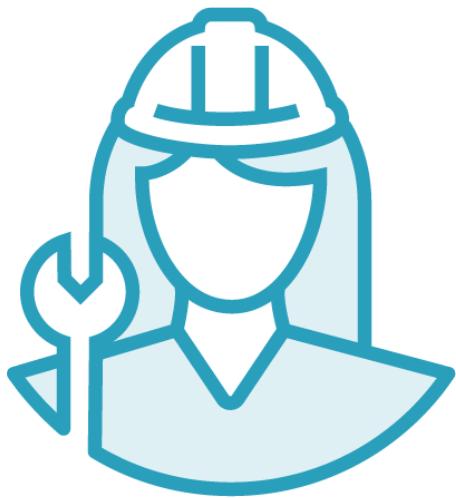
- ✓ Arranging data in a particular order
- ✓ Sort dimensions:
 - Data source order
 - Alphabetically
 - By a Measure
 - Manually





Options for Users after Publication to Server

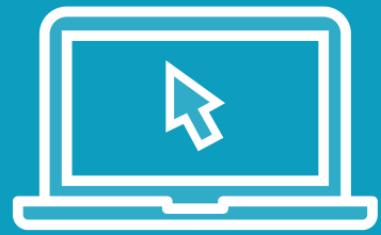




Options for Designers



Demo



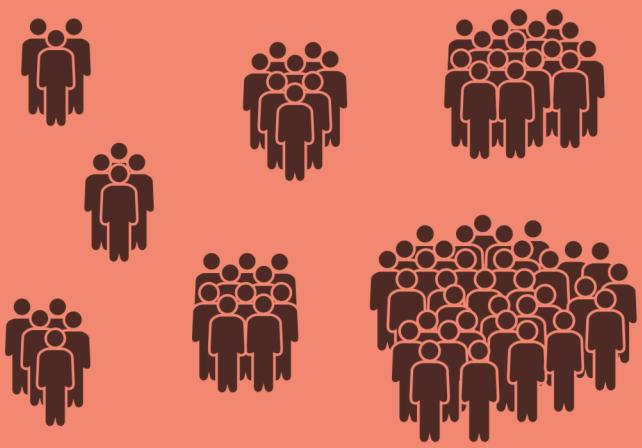
Sorting Data

- User Options
- Designer Options
- Nested vs. Non-Nested
- Dynamic Sorting



Creating Groups





What are groups?

- ✓ Combines members in a field
- ✓ Correct data errors
- ✓ To display an 'Other' member
- ✓ Can be used in calculations



Groups are also used
to create custom
territories on maps.



Demo

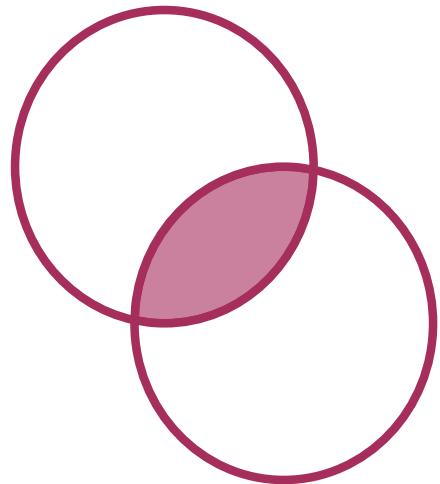


Creating Groups



Creating Sets





What are sets?

- ✓ Subset of your data
- ✓ Based on some condition



Types of Sets

Dynamic

Using Condition to define rules or Top to define limits

Fixed

Manual selection of members from one or more dimensions



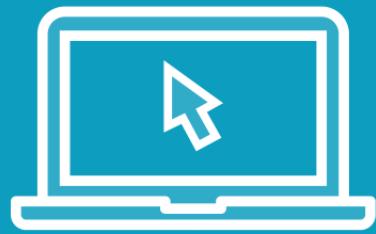
A black and white photograph of a wooden ladder leaning diagonally against a backdrop of a cloudy sky. The ladder's rungs and rails are visible, and the clouds are bright and textured.

Set Actions

- ✓ Extend Set functionality
- ✓ Allows users to change or update the values in a set



Demo

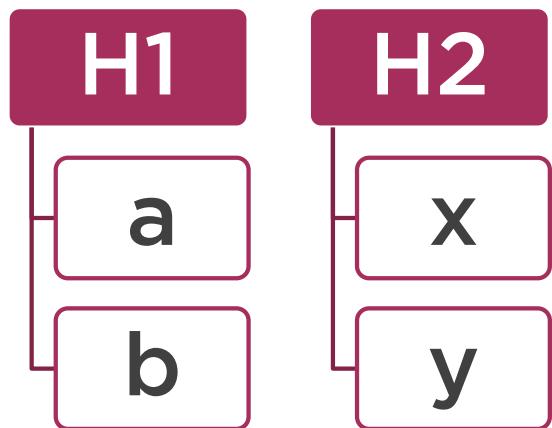


Creating Sets



Creating Hierarchies



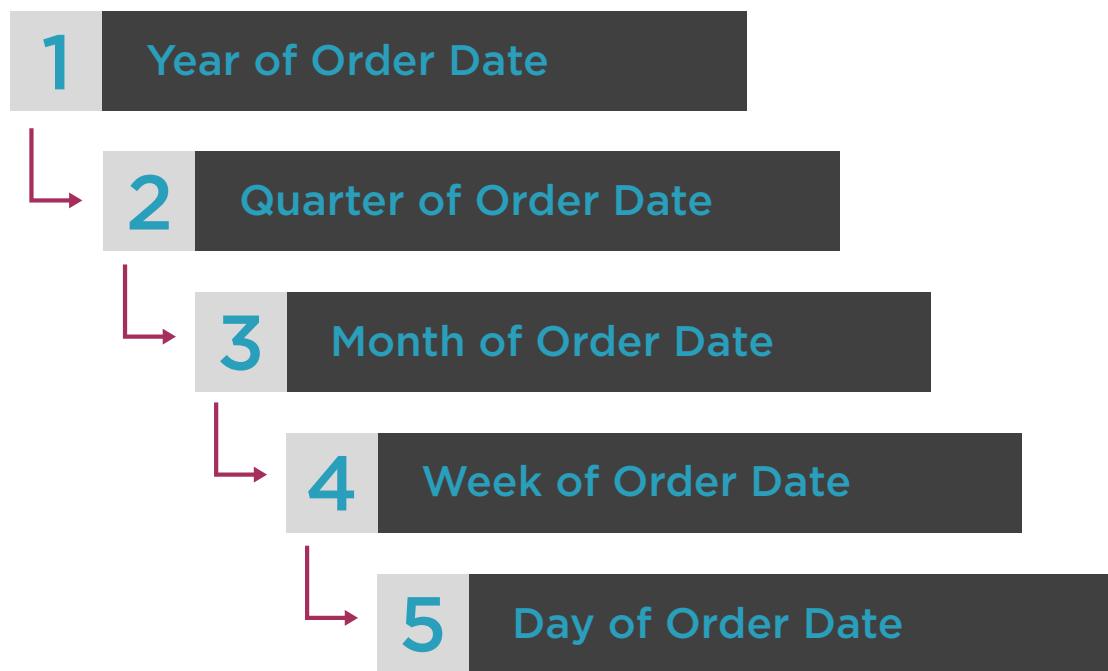


What are hierarchies?

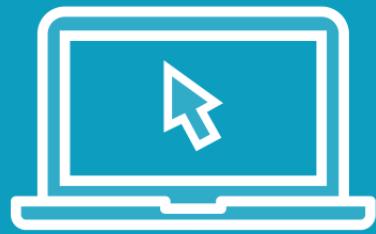
- ✓ Organize Dimensions
- ✓ Drill-down capability



Date Hierarchy Example



Demo



Creating Hierarchies



Summary



Transforming Your Data

- Sorting Fields
- Creating Groups
- Creating Sets
- Creating Hierarchies



Things to Remember

Consider the user experience when thinking how users may sort a visualization

Groups can be used in calculations like any other dimension

Sets are dynamic if setup with a condition rule or top limit

Hierarchies allow users to drill-down to different levels

