

Tableau

↳ Groups

↳ Sets → Combined sets

= Groups
Group the
attributes
↓
Category with
Category

② Can be
created on

vs

= Sets
Binary in Nature
In/out ✓

② Only in 1 dimension

Dim & measure

- ③ No intersection
- ④ Not Dynamic

③ Intersection is allowed.

④ Can be dynamic

Agenda

↳ Data connections

↳ Tables in Tableau

↳ Types of calculation

↳ Basic Aggregations

↳ Row level

↳ Column / Agg

brief

- ↳ LODs → level of details
 - ↳ Table calculation
 - ↳ Dynamic calculations using parameters
 - ↳ More charts
-

Tables in Tableau

Q Analyse Sales by Sub-Category across each segment?

↳ Export into CSV

Tables

Stables

Sus	S1	S2	S3

Cross
tab

Summary Tables

* Only text
is used

highlight tables
* Labels &
Colors

nest
maps
* Colors
& size.

for Totals

↳ Go to Analyses on top > Select

Total

↓

add

Grand

total

Sub-total

Hierarchy

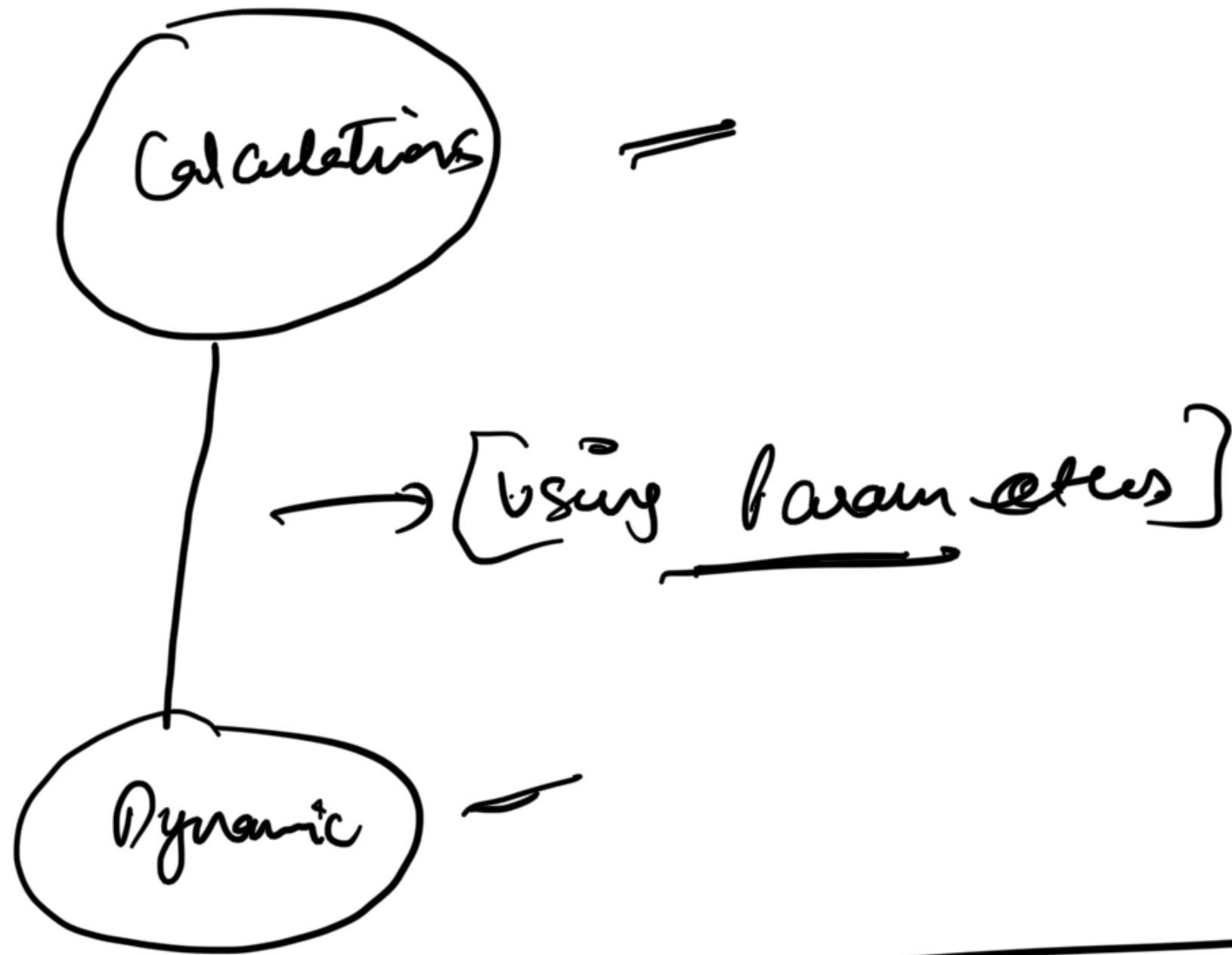
↳ Expand/Collapse

↳ Should be in order

Product line

↳ Cat > Sub > Product

Date
year > month > day



Types of Calculation

↳ Basic Agg =

↳ Row)

↳ Agg/Column)

↳ LODs → level of details

↳ Fixed → most used.

↳ Exclude

↳ Include

↳ Table Calculations

→ Calculated fields allows you to create new columns based on existing fields or entirely new.

2 2x Profit → (2x Profit)
↳ Sub Cat.

= (Datatype)

↓
= (Datatype)
& [Measures = (int)]
Dim = (ABC)

U.W try out $IN(T_1, T_2)$ in Tableau.

Drill down \rightarrow More granularity
hierarchy $\left\{ \begin{array}{l} \text{Cat} > \text{Sub Cat} > \text{Product} > \text{Sales} \end{array} \right.$
Drill up \rightarrow More Aggregation

Aggregation $\propto \frac{1}{\text{granularity}}$

product
sub
cat

Q2 Analyse ^{Overall} Profit Margin?



KPI

to measure the business performance



%age

$$\text{Profit Margin} = \frac{\text{Revenue} - \text{Cost}}{\text{Revenue}}$$

$$\left[\text{PM} = \frac{\text{Profit} \times 100}{\text{Sales}} \right]$$

$$\left[\frac{\text{Total P}}{\text{Sales}} \right] \text{ Overall PM}$$

$$\left(\frac{\text{Sales} - \text{Cost}}{\text{Sales}} \times 100 \right)$$

\uparrow
 [Row level = Calculation and the aggregation (avg)]
 (12.03%)
 (P)
 Aggregation and then
 (sum) Calculation
 [Column level
agg]

$$Cst = \text{Furniture} \rightarrow \frac{\text{Total P.}}{\text{P. TS}} = 2$$

9 Analyse the PM based on different
expenses? [low]

↓

100000

10000

20000
30000

PM =

$$\frac{\text{Profit}}{\text{Sales}} =$$

$$\left(\frac{\text{Sales} - \text{Expenses}}{\text{Sales}} \right)$$

$$\left(\text{PM} = 1 - \right)$$

$$\left(\frac{\text{Expenses}}{\text{Sales}} \right)$$

100000
20000
30000

1

Parameters

↳ A variable to replace a constant
(manually entered value)

Applications

↳ Dynamic Calculations

Step Size

① — 100 →
10. → (10)

20 ↪ — (10) —
 30
 40
 ;

1.10 ↪ Use parameter as a filter?

Applications
 ↪ Top (2) Customers (Dynamic Sets)
 ↓
 (10, 50)

↪ [Switch b/w charts
 on b/w Dim & measure]

Summary

1.1.2 [Data connections]

↳ live

↳ contract

[Read]

2. Analyse P.M at Region level,
Best performing Region?

↳ Best category?

↓
Highlighted =
as

"Best in"
class

↳ (in a Tabular format) =

NA

Region	Cat	Subcat	PM	Play
				0 Dist on ca