UDEMY Tableau classes Notes

Rows – measures
Colum – Dimensions

(2) Tableau Basics

Dimensions = ~~Numerical values~~ Categorical values. (Independent variables)

Measures = Numerical values (dependent variables)

Calculating New Calculating field

→ In measures Right click ~~Create~~

↳ Create Calculate field

Formatting in the chart

→ Pane

→ ~~Axis~~ x axis

→ Y-axis

→ change Font size

→ change Bold, Italics etc

measures = green

~~Colour~~

Dimensions = Blue

Extract

Database -> Right click -> Create Extract

Time series data

In period data on the graph, we have
Year, month, Quarter, days

→ In the dropdown ① Year, Qtr, month, day } agg - to each month/day & Quarter

② Year, Qtr, month, day } all the month/day/quarter each individually

Aggregation off/on = to get the granularity of the data on the graph

Highlighting → Just clicking on the filter color we get highlighting

→ Highlight Button is beside the dropdown tab

Area chart - Use it wherever it is necessary

Filters

→ drag & drop the features to filter & select No of items to be filtered.

→ drop down - show filter & get the different types of filter.

→ dropdown - customize, Unclick all values.

Joining data

Join two tabs/pages of csv or Excel sheet

drag & drop => default is inner join

Creating map / working with Hierarchies

Drag – Latitude, Longitude

→ drag Country → detail

Scatterplot ; applying filters to multiple worksheets

→ ~~First~~ first Sheet – filter is there

→ dropdown of the item in worksheet → apply to worksheet

God One → all using this data source

Adding Interactive action = filter

→ action → filtering → Highlighting

↳ Go to dashboard → Filter Add any filter

↳ In the dashboard dropdown menu click → use as filter

→ Select / Hover → Points are there

Adding Interactive action = Highlighti

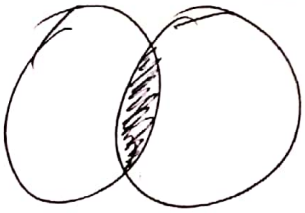
↳ Go to dashboard → Highlight adding other

↳ Add the region in the scatterplot graph
- add state to detail

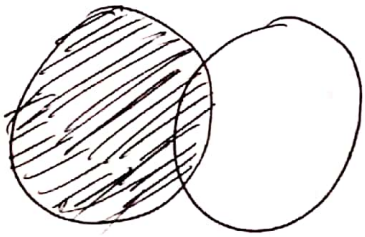
→ Customizations are inside here

How LEFT, RIGHT, INNER & OUTER Join work

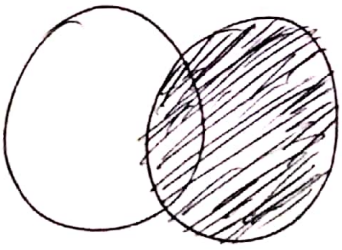
Inner join



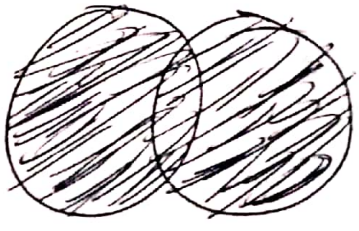
LEFT OUTER JOIN



Right outer Join



Full outer join



Joins with Duplicate values

↓

Several items in the table for same Common Column

General Inner join ; it will join all of the Common values

Joining on multiple fields

Using Left join => Condition is AND

Data Blending in tableau

Add two Excel/CSV sheets seperately

Data blending chain is visible on the 2nd Database

joined automatically on Common items

→ Blending Connections

Data → Edit Relationships → Custom = Select items to be joined

Changing the name with same Contents blends the data itself.

→ whichever one we choose the dataset will become Primary dataset.

Diff b/w Joining & Blending

↳ join with one time join

↳ then Blending seperate → to retain the details / not to lose the details

→ different types of datasources

Dual-axis chart

↳ Data → Edit relationships → Customs → to get the details on chart of blended data

↳ Right click → dual axis

Right side → Right click - Synchronize

Creating Calculated fields in a blend

Right Click → Create Calculate field

↳ Do the Calculation from both Data

↳ Remove the ~~errors~~ by Correctly doing the Calculations

Recap

Blending Data

→ A blend is like a smart join 'on the fly'

→ It is a left join

→ Common fields with the same name are picked up automatically as the blend clause.

→ You can Control this via the "data" menu.

→ Blending occurs at the granularity of your view

→ Aggregation happens before the blend.

→ Blends are unique to each worksheets.

* Use Join when:

↳ Combining data at row level

* Use Blends when:

↳ Data sources have different levels of granularity.

↳ Data sources come from different systems.

Setting geographic Role

↳ dropdown in Region

↳ Geography Role → select ; State, City & country

→ Right bottom "Unknowns" will be displayed ;

↳ click on it

↳ edit locations

↳ then assign those locations

Demography (Gender, Profession, age group ..... etc ---)

→ getting % on the graph

→ dropdown

↓

Quick table Calculation

↓ &

% of total → It shown

Creating Bins (agegroups & et.al.,)

↓

measures

↓

Create

↓

Create bins

↓

~~Input~~ Put the range

Parameters

↓ to adjust the sizes of bins very quickly

measures

↓

Create parameter

↓

Feed the data

↓

Click Show parameter

↓

Click on bins → Edit bins → To Size of bins → Select parameter

→ Then dynamically change Size of bins.

Tree map

↓

Top Right Corner → show me → different types of Maps

Dash Board & Interactive

⇒ Put all the graphs in the dashboard

→ · Click dropdown on main graph

↓

Select use as filter.

↓

Do the same for rest of the graph if needed

↓

To remove the popups on the graph

↳ go to Individual page

↓ worksheet →

↓ tooltip

↓ uncheck "show tooltip".

Analysis of the Dashboard.

Storyline for Storyboard

↳ analyses to be done & written over the Storyboard

→ Select all at once

↓

Each region by each to ~~the~~ write the analysis

Use the data interpreter while uploading the data.

pivot

↳ In the datasource

↓

Select Column → Drop down → pivot

Spliting the Columns in data source

→ dropdown the Column to be split

↓

Select split → last 1 word, seperated by Space
(First all 1 word)

Metadata grid

It is there in the ~~Sort~~ datasource beside the Sort fields

To keep the bars @ same height

→ drop down

↓

add table Calculation

↓

% of total down

Fixing Geographical Errors

↓

Unknown locations @ the Right bottom Corner

↓

Edit data / filter data

Custom territories via groups

* After the map generation
* To make Custom territories ~~Select~~

1st method (1) → Select all the States & Create group & Right click & Select group

→ take the state out of Marks then we get two seperate groups

2nd method → Custom territories via geographic roles

↳ Select ~~Inside~~ after right click

↳ geographic role.

→ Create from

→ State

↳ Then drop the map by choosing Sales / Revenue etc

Highlighter

→ drop down – show highlighter for different details

Clustering

↳ Go to analytics tab beside data

→ In the model – select Clustering (K-means)

Cross database joins

→ Connect different file (different format)

→ match by same id's

Tableau ⇒ UPX Academy

↳ Bar chart ⇒ 1 dimension
1 measure

↳ Outliers ⇒ Average > median

↳ Groups & Sets ⇒ Select on the graph make it filter groups / sets based on the requirements for further close analysis

↳ The above is for static set - select shows the chart itself

→ For Dynamic set - select a dimension & go to Create - set → Top → selections made as per the problem

set

→ Pareto Chart

→ Sort them either Asc / desc

→ quick table Calculation - from drop down

→ Edit table Calculation

→ add secondary Calculation

→ % of total

→ dual axis

→ drop down → Mark type

First chart → Bar Chart

→ Second chart → Mark type

→ line chart

→ add labels on the chart

→ Then Insight

→ LOD => Level of detail calculation

→ ① Fixed
② Include
③ Exclude

① Fixed

→ fixed [Column name] : Sum ([Column name])
Avg (

↓ only @ the level of Col detail

② Include

→ Include [Col name] : Sum ([Col name])

Link is there in the last video