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February 9th, 2021

Go with the Tab-Flow

tableau®

Tips for the DS Pipeline in Tableau

Today's Agenda

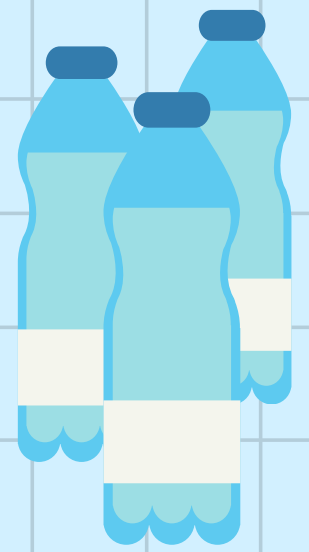○ ○ ○ ○
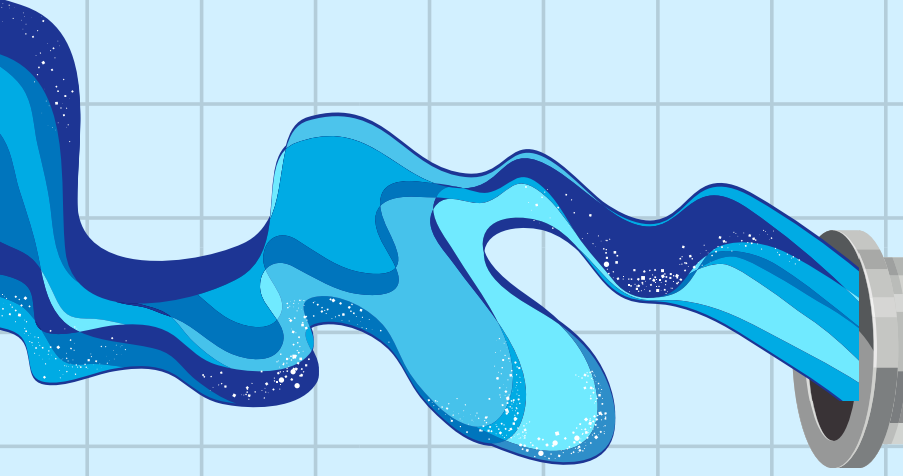
Prep
2
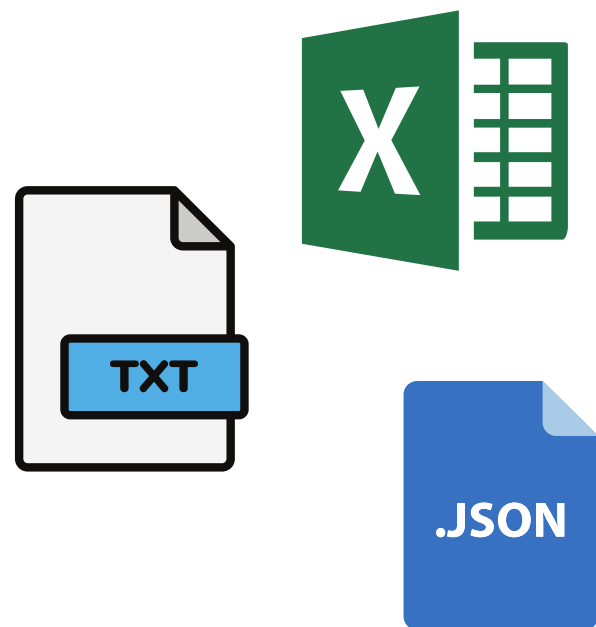
Model
4

1
Acquire

3
Explore

Acquisition

Source

- Connection to the data
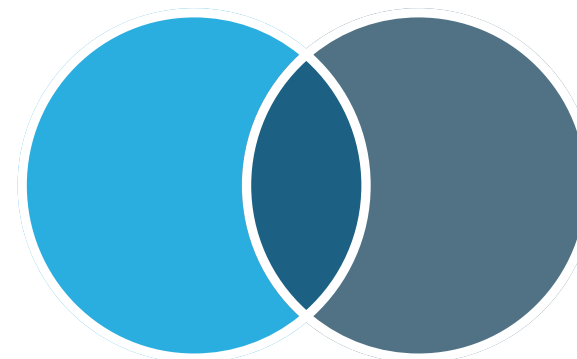- "The link between your source data and Tableau"

Relationship

- Default when combining files on same source
- Potential for joins, but does not merge the data together
- During analysis, queries the tables to create a custom table of data
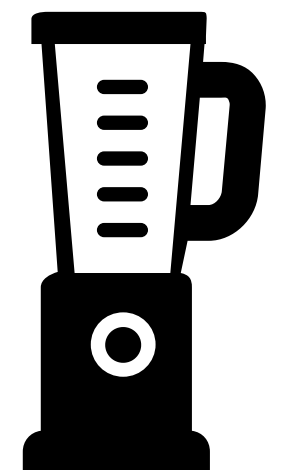

Joins

- Adding data by similar row or column structures
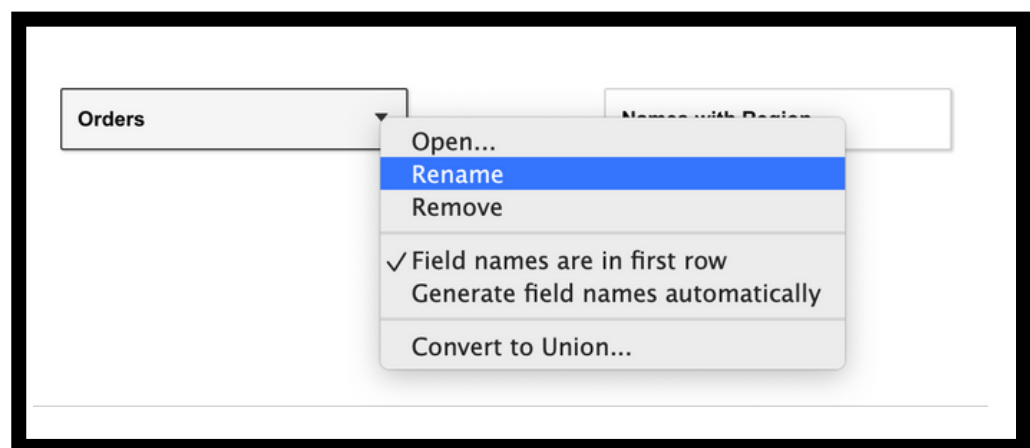- Can cause nulls
- Union to add rows

Blend

- When using 2+ separate Tableau data sources
- Data remains separate
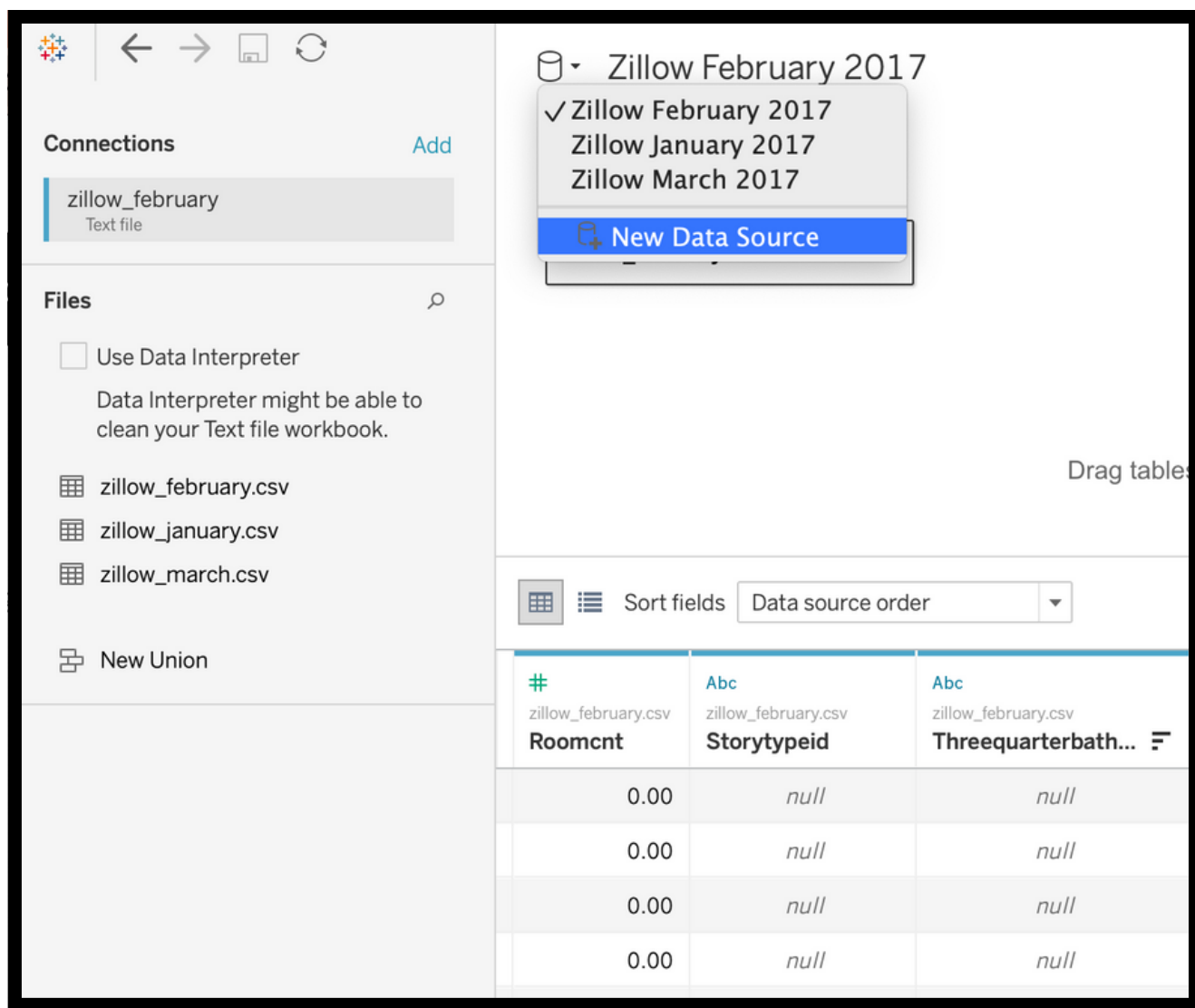- During analysis, mimics left join

Data Connections

You can rename your data connections, do so to help yourself remember what's what.

Right click the box and click rename to type your **data table** name.

Click the name to type your **data source** name.
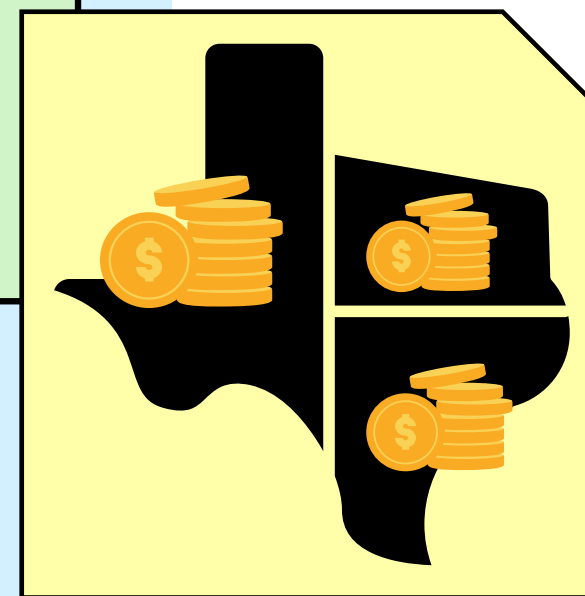
Preparation

Dimension

- Independent variable
- Qualitative, categorical data
- It does not make sense to sum the numbers
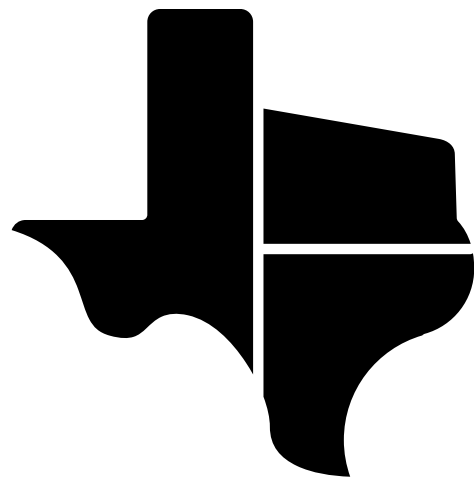
Generally, the **measure** is the number, the **dimension** is what you break the number down by.

Measure

- Dependent variable
  - ex: sales being $1,234 is dependent on the context of detail, sales by month
- Quantitative, #
- It makes sense to sum the numbers

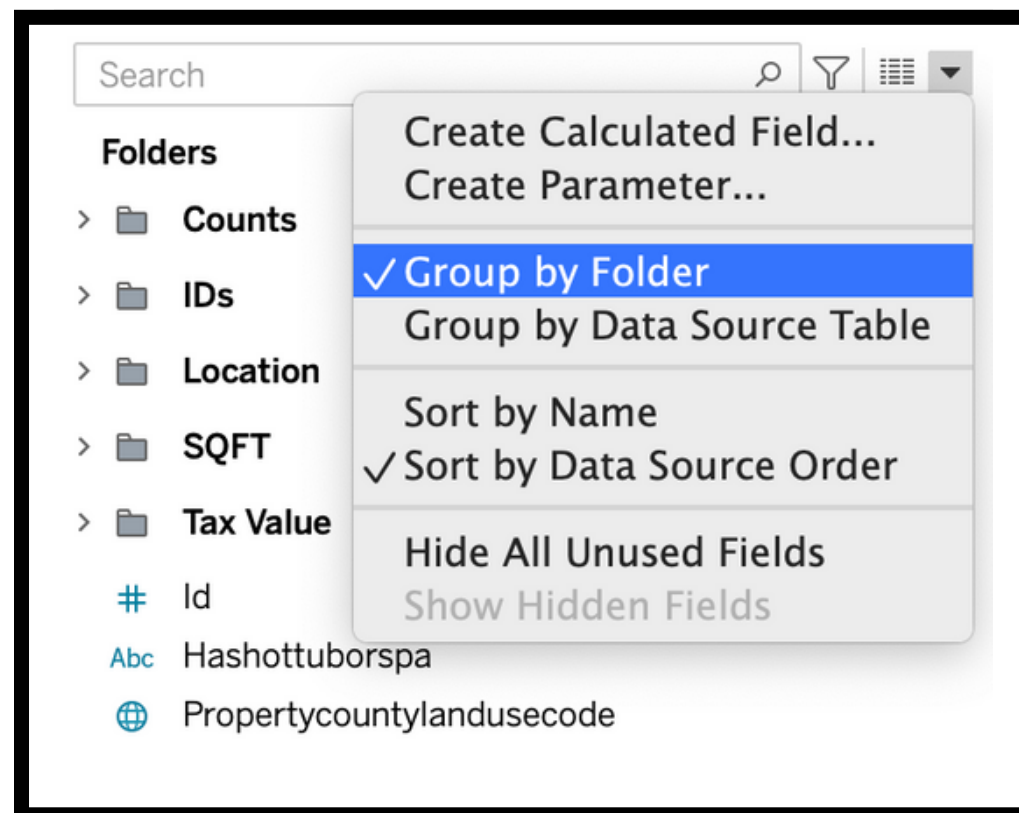# Folders

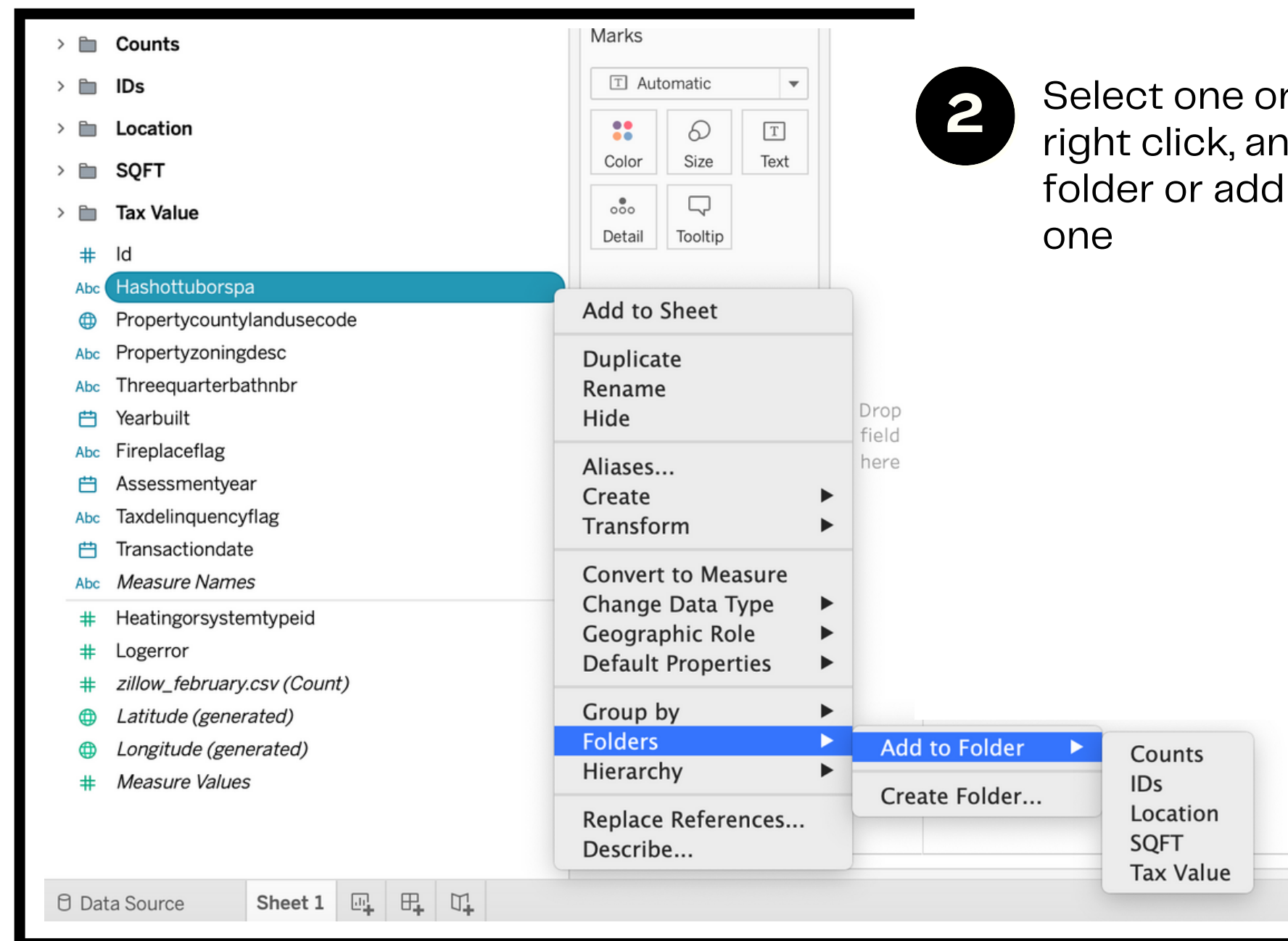Folders also split the features by measure/dimensions

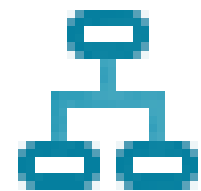**1** You must select Group by Folder first to be able to create the folder groups.

2 Select one or more columns, right click, and create a new folder or add to an existing one

Hierarchies

1 Select the features that are categories/sub-categories of each other

Abc Region
Abc **Category**
Abc **Sub-Category**
Abc Product Name
Abc *Measure Names*

\# Sales
\# Quantity
\# Discount
\# Profit
\# *Orders (Count)*
🌐 *Latitude (generated)*
🌐 *Longitude (generated)*
\# *Measure Values*

Duplicate
Hide

Create ▶

Convert to Measure
Change Data Type ▶
Geographic Role ▶

Group by ▶
Folders ▶
Hierarchy ▶   Create Hierarchy...
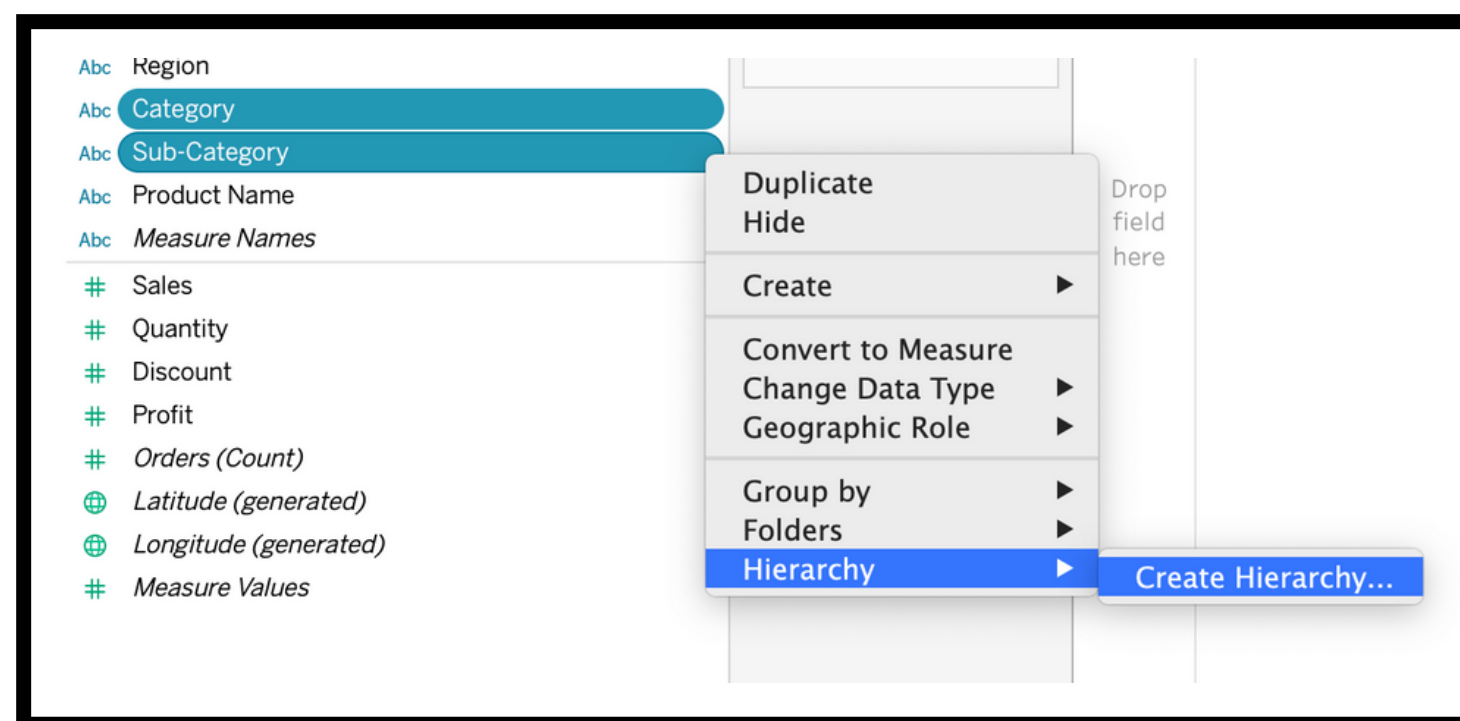
Drop
field
here

2 Name your hierarchy. You can drop and drop more features, and rearrange the order by dragging

Create Hierarchy

Name: Order Category

Cancel   OK

What it looks like

∨ 🔀 Order Category ▼
    Abc Category
    Abc Sub-Category
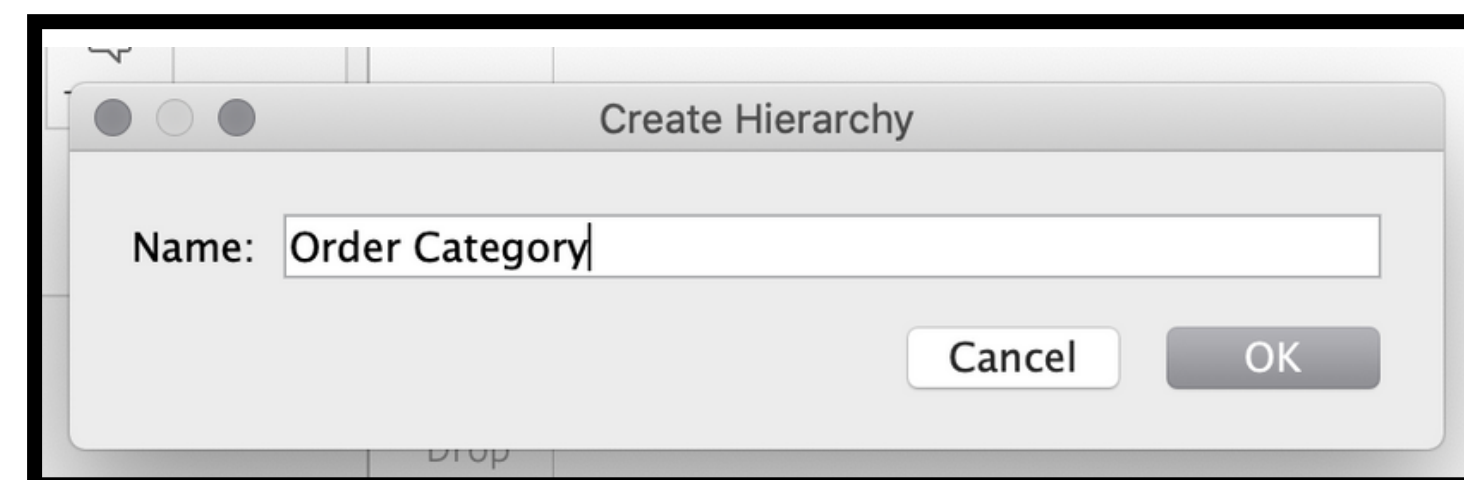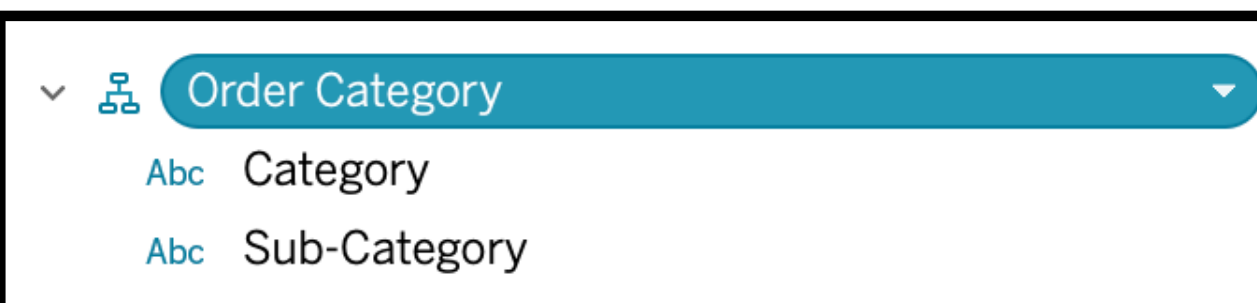
Exploration

Animations

Create a chart that moves with the information

1 Create your base viz. Add a filter of choosing (such as year or region)

2 Click format –> Animations –> Fix settings based on time to animate, type of animation

3 Click on the filter to watch the animation.

Animations ✕

Workbook Default

On	Off

Duration
0.30 seconds (Fast) ▼

Style
Simultaneous ▼

Reset All Sheets

Selected Sheet
Sheet 1

Animation
On ▼

Duration
1.00 seconds (Slow) ▼

Style
Simultaneous ▼

Set for every sheet in workbook...

Or set for the current sheet only

Average Profit by Month - All

Order Date

YEAR(Order Date)
⊙ (All)
○ 2017
○ 2018
○ 2019
○ 2020
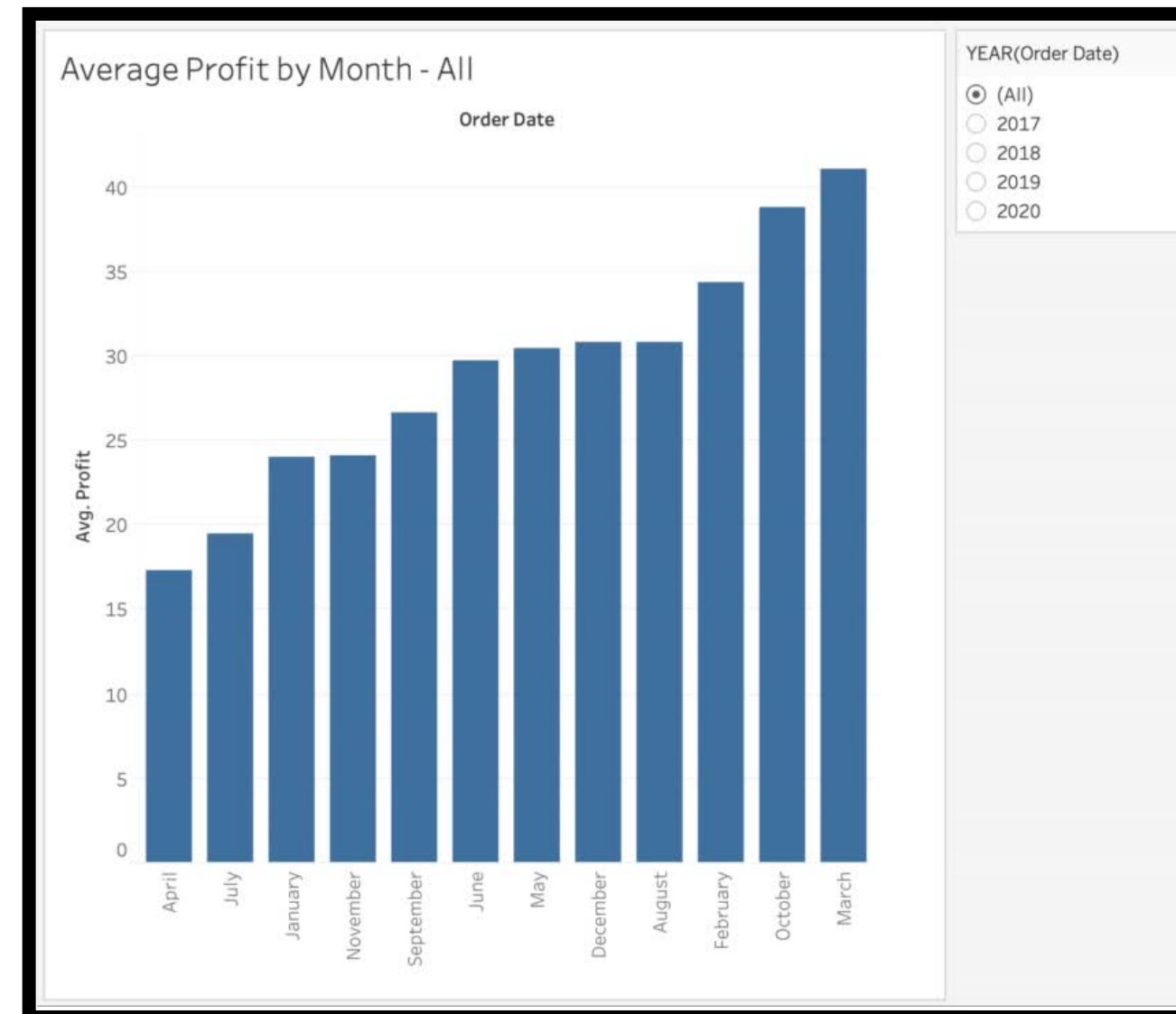
Dynamic Title

Add a title that changes with the data shown

similar to f'profit by {year}'
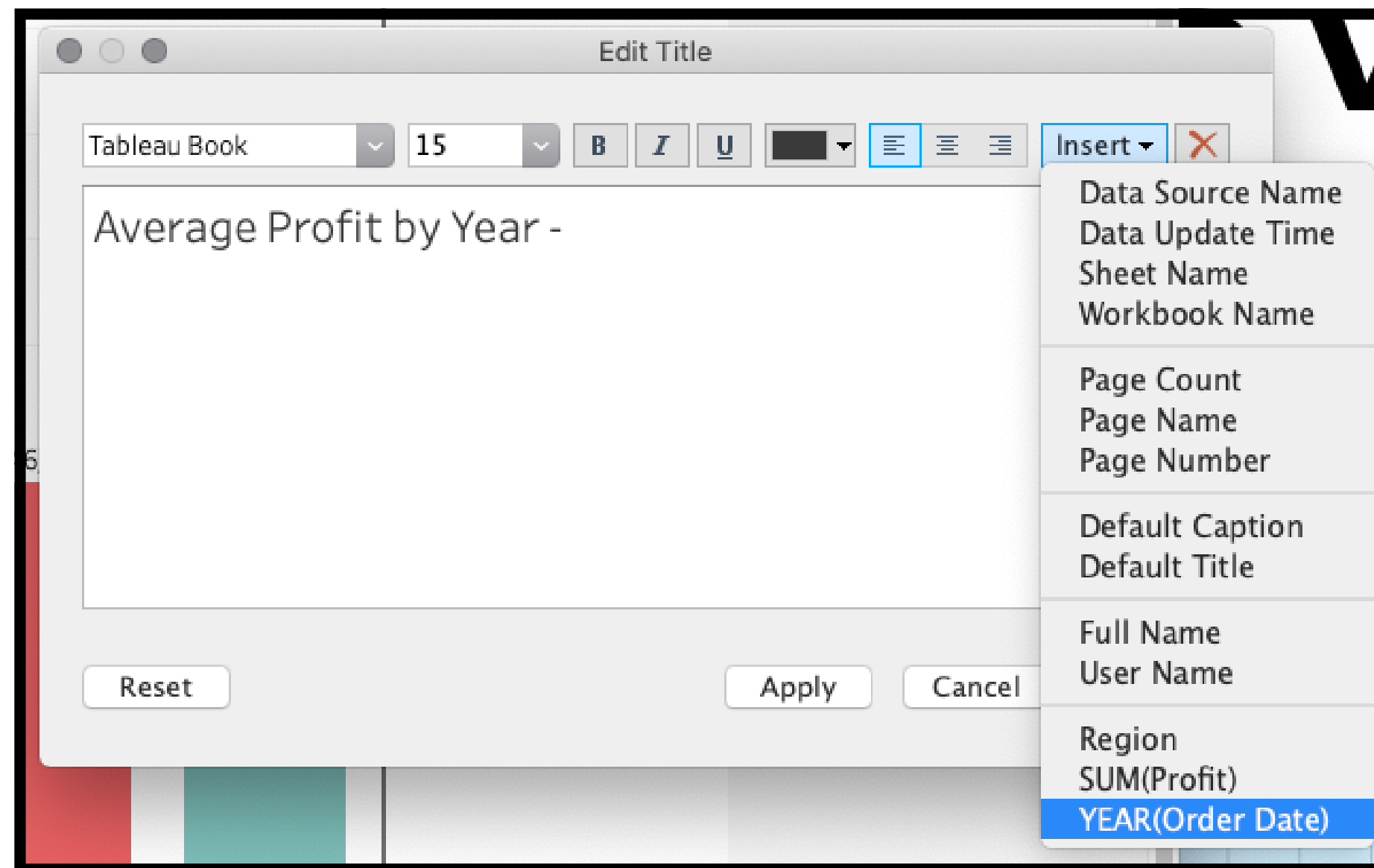
Edit Title

Tableau Book | 15 | **B** *I* U

Average Profit by Year -

Insert ▾

Data Source Name
Data Update Time
Sheet Name
Workbook Name

Page Count
Page Name
Page Number

Default Caption
Default Title

Full Name
User Name

Region
SUM(Profit)
YEAR(Order Date)

Reset | Apply | Cancel

Modeling

Analytics Tab

Cluster

- Uses the k-means algorithm for clustering
- Scales using min-max normalization

Location and Avg. Sales Cluster

AVG(Sales)
- 100
- 500
- 1,000
- 1,500
- ≥ 2,000

City and Sales Cluster
- Cluster 1
- Cluster 2
- Cluster 3

United States

Mexico

353 unknown

© 2021 Mapbox © OpenStreetMap
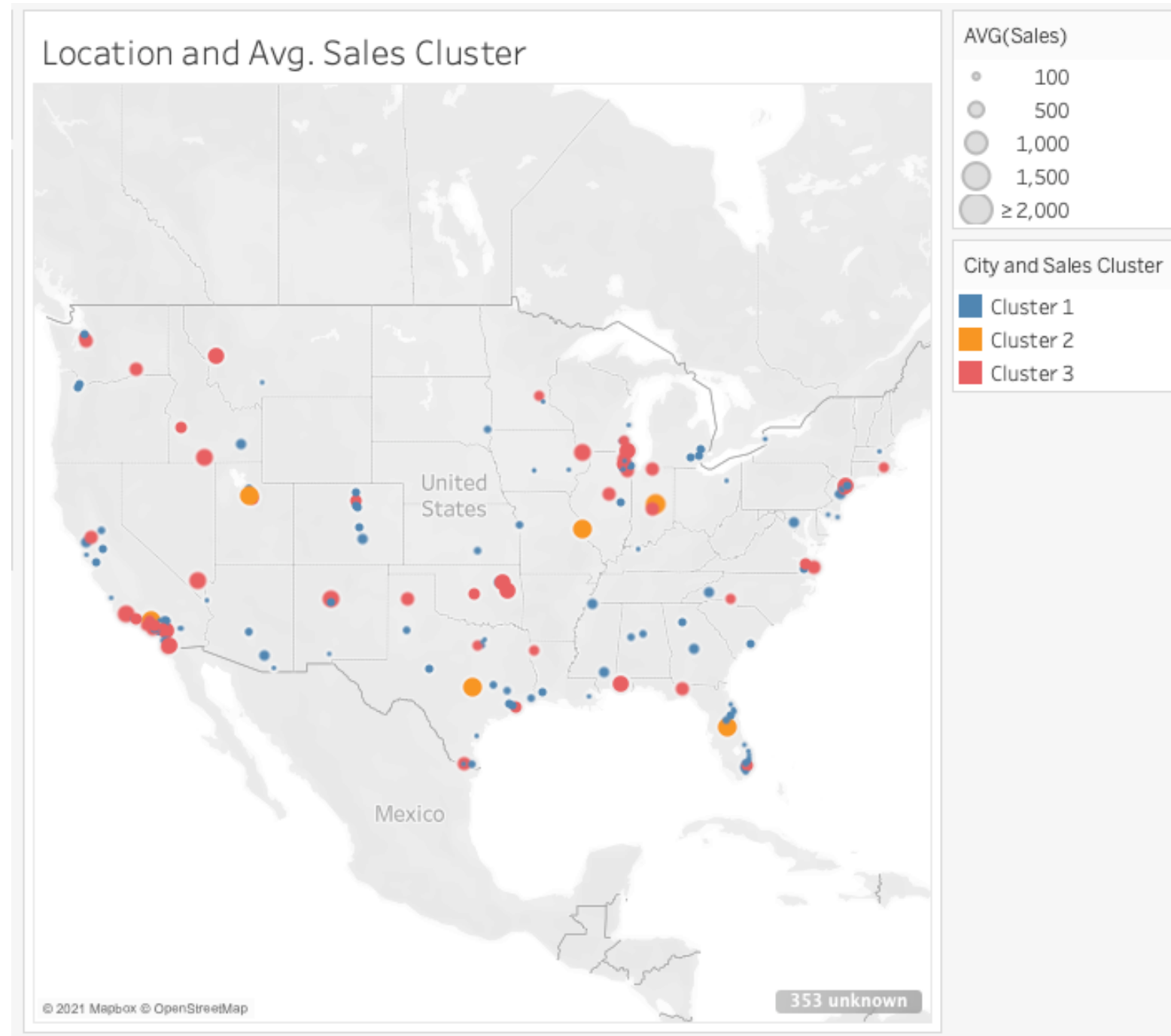
Final Delivery

Image Links

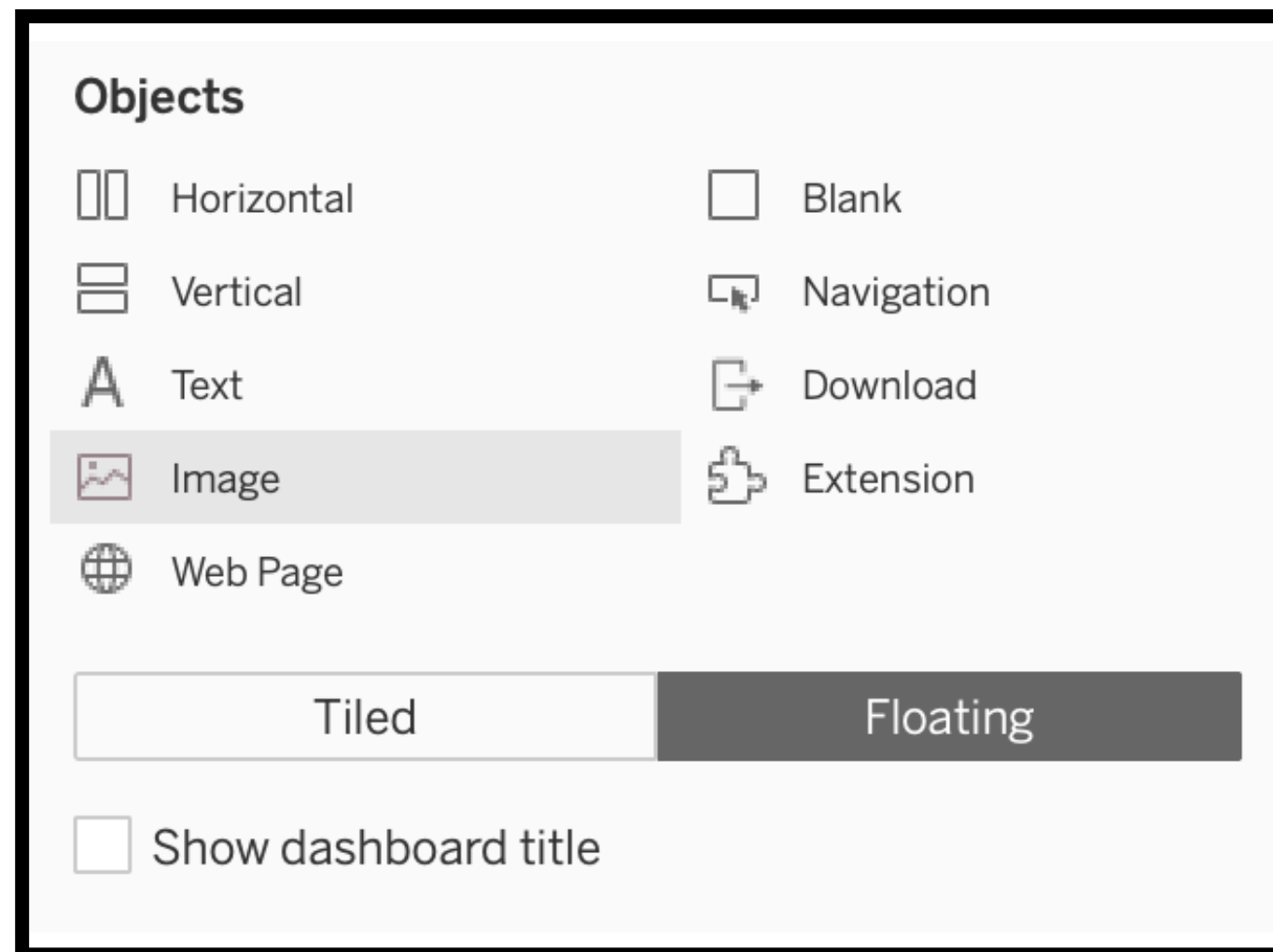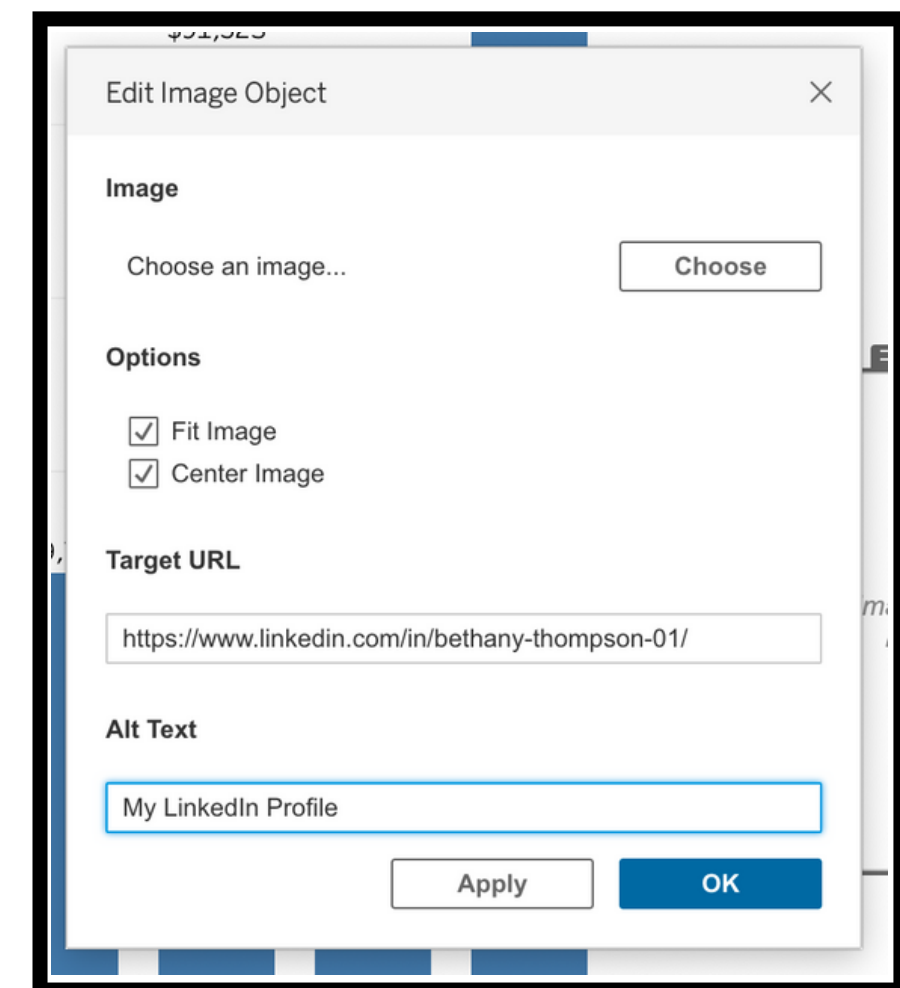Add images to your dashboard and you can add links to your github repo, profile, etc.

On the bottom–left of your dashboard, you can add several objects floating or tiled.

You can add your url here. When the user clicks on the image, they will be directed there.

Show All Tabs

Show all the tabs in your workbook on Tableau Public.

1 Click 'Edit Details' next to your viz title.

Sales Volume vs. Average Price ✏ Edit Details

Viz Author: **Bethany Thompson**

7 Views ☆ 0

2 Check off 'Show workbook sheets as tabs'.

Title

Sales Volume vs. Average Price

Make sure your viz has a good title so people don't pass it by when they're browsing Tableau Public.

Permalink

http://www.

Plan on embedding your viz? This is an excellent way to drive traffic to your site.

Inspiration

Add URL to a Tableau Public viz or author profile

Did you leverage the community for your creation? Don't forget to give a shout out to those who helped!

Description

Sales Volume vs. Average Price

A great description and relevant **#hashtags** can help people discover your viz.

Toolbar Settings

☑ Show view controls *Undo, Redo, Revert*

☑ Show author profile link

☐ Allow others to download or explore and copy this workbook and its data

Other Settings

☐ Show workbook sheets as tabs

Cancel   Save

Connect +

in www.linkedin.com/in/bethany-thompson-01/

github.com/ThompsonBethany01

✉ thompson.bethany.01@gmail.com

public.tableau.com/profile/thompson.bethany.01#!/

Thank you!

Appendix

- Udemy: Tableau 2020, 19, 18 & 10: Certified Associate certification by Philip Burton

  - https://www.udemy.com/course/tableau-2018-tableau-10-qualified-associate-certification/

- Get Tableau for Free!

  - https://www.tableau.com/academic/students

- Dimension vs. Measures

  - https://evolytics.com/blog/tableau-fundamentals-dimension-vs-measure/

- Tableau Docs – navigation sidebar to find specific topics

  - https://help.tableau.com/v2020.4/public/desktop/en-us/gettingstarted_overview.htm