

Day – 2 Tableau Notes:

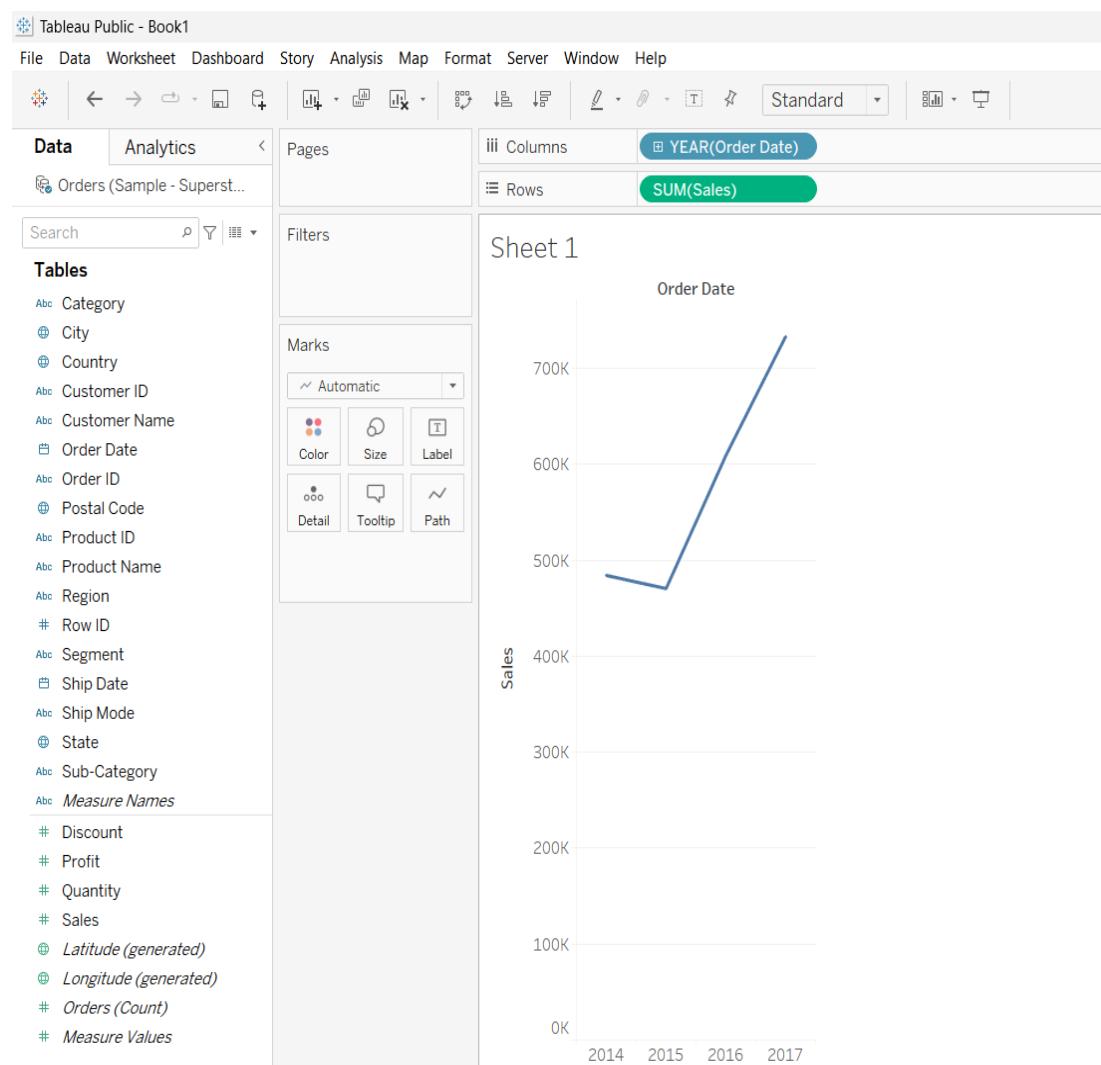
Quantitative : means numbers . Can do statistical calculation and mathematical terms .

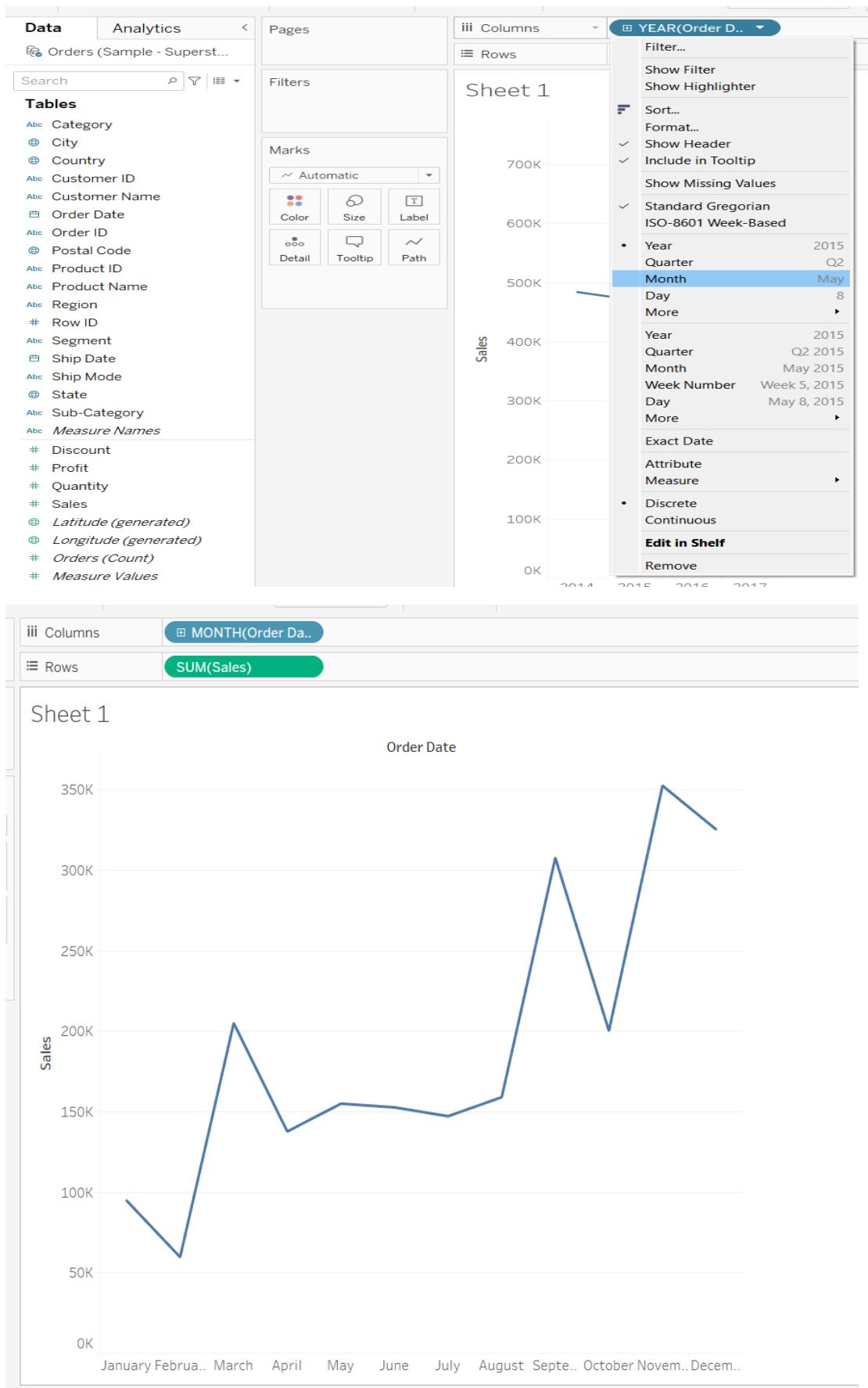
sales: 261.55 discount: 0.45 profit: 41.91

Qualitative: are not numeric data/ not numbers .

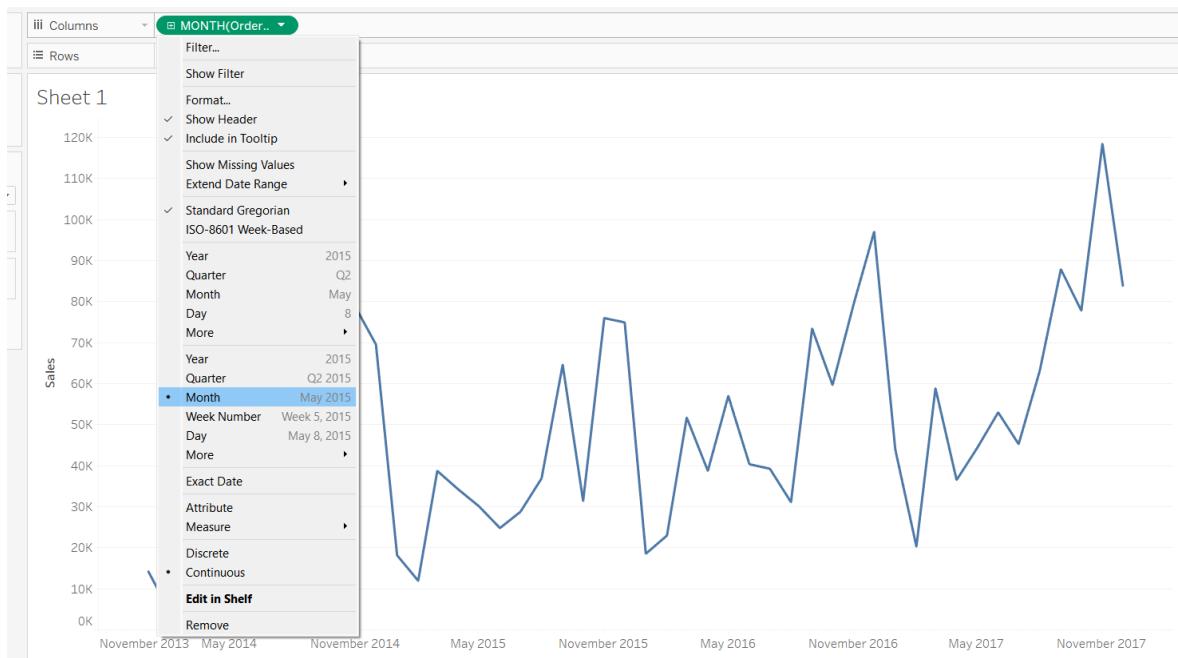
Continuous value : 0 to any number

Discrete : categorical .. can be different types





Blue : blue (month) means discrete . discrete means categorical .



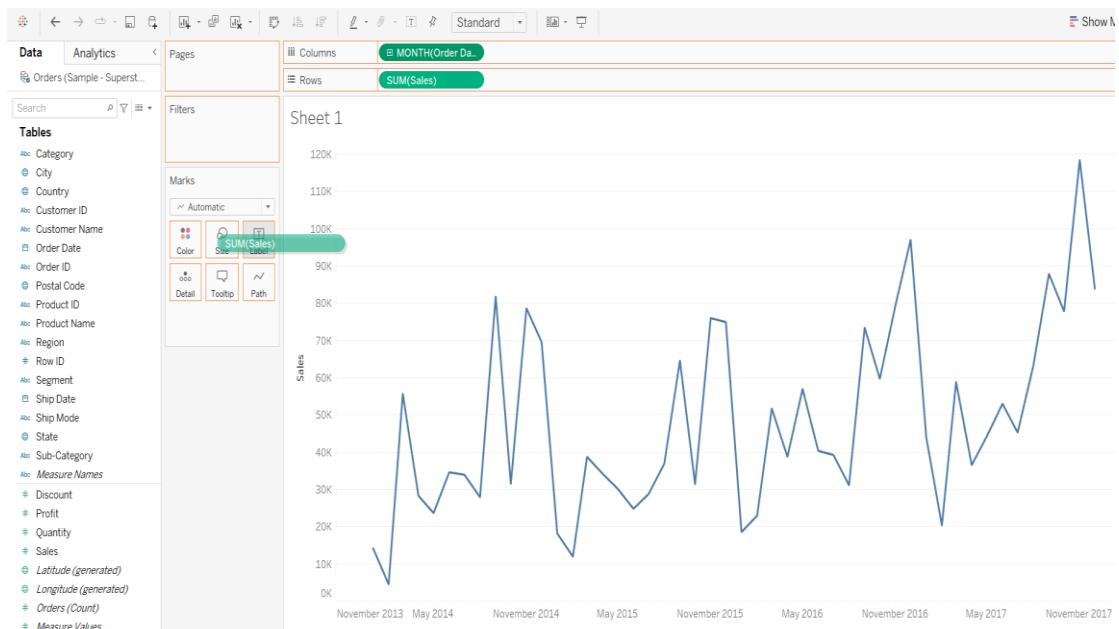
More data points

And the color changed from blue to green ..

And it has become continuous .. that means it will take year by year.

.....

Put sales on the top of label : like below. Drag and drop

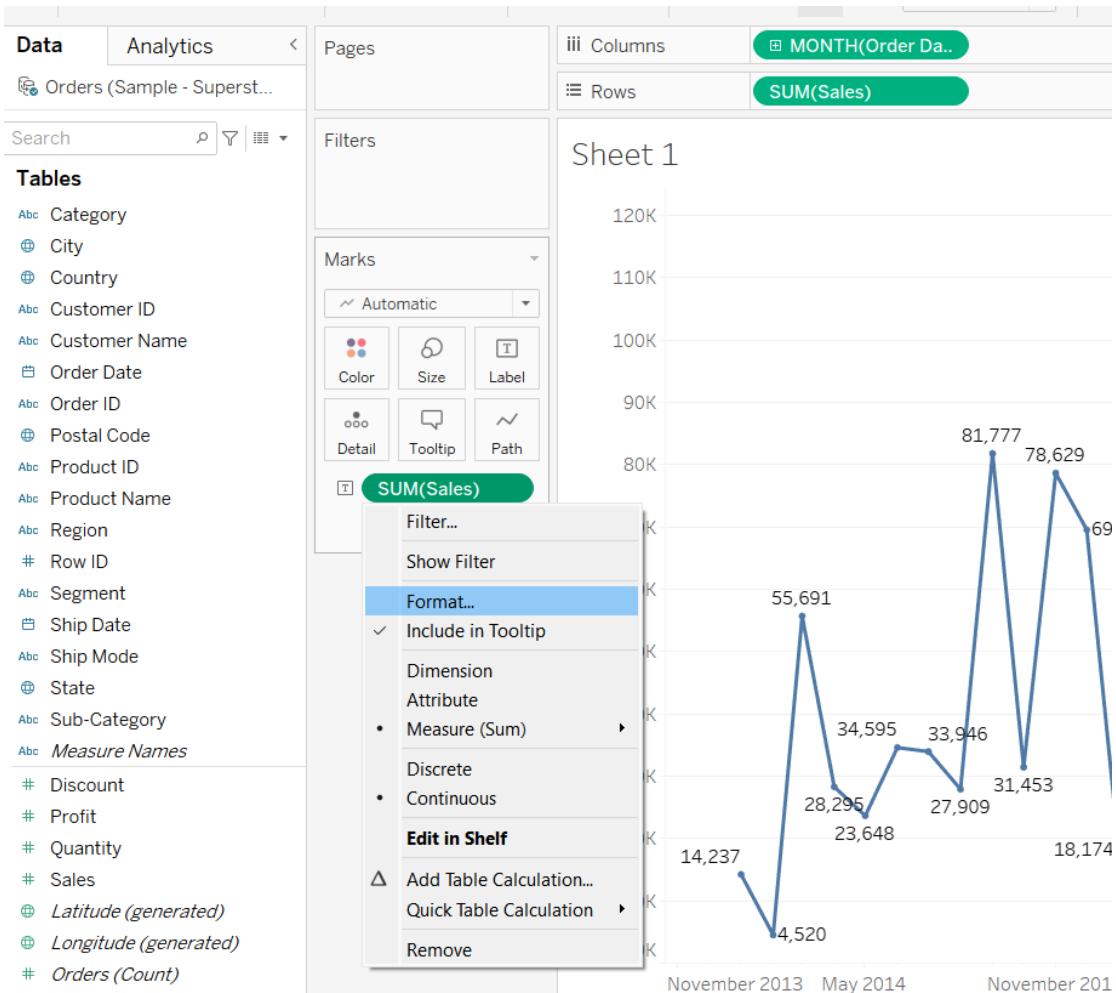


Now it looks like this .. it shows the values .



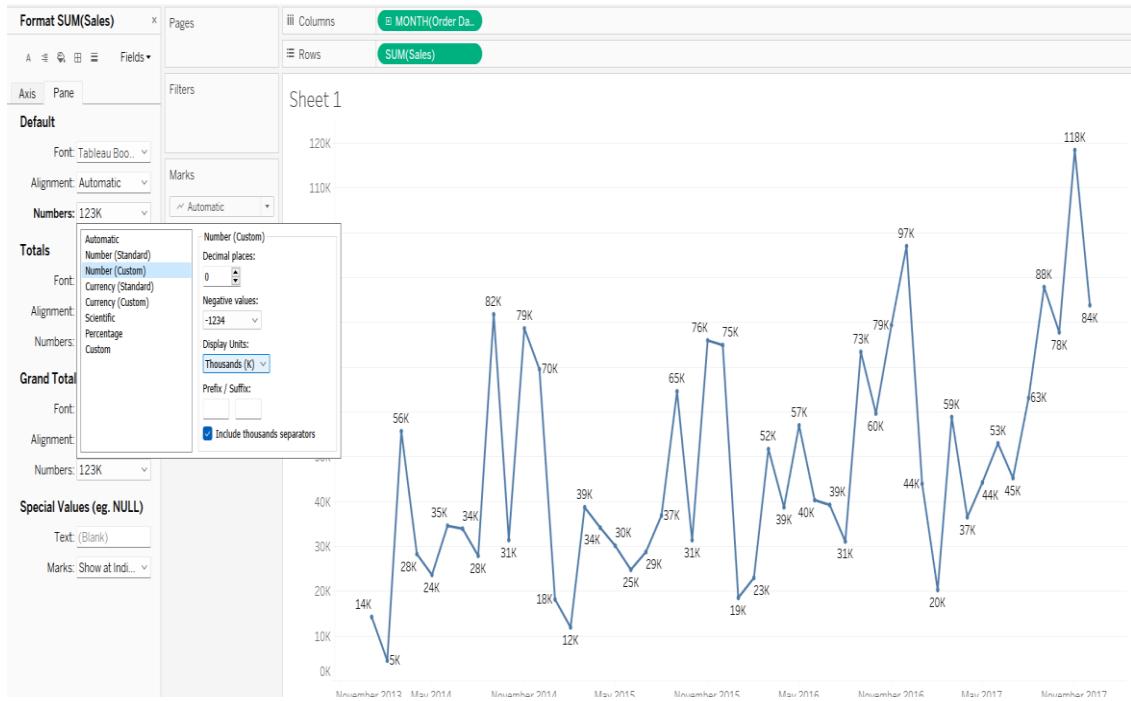
For selecting the points :

Go to format click on that for changing the values into k or million etc .



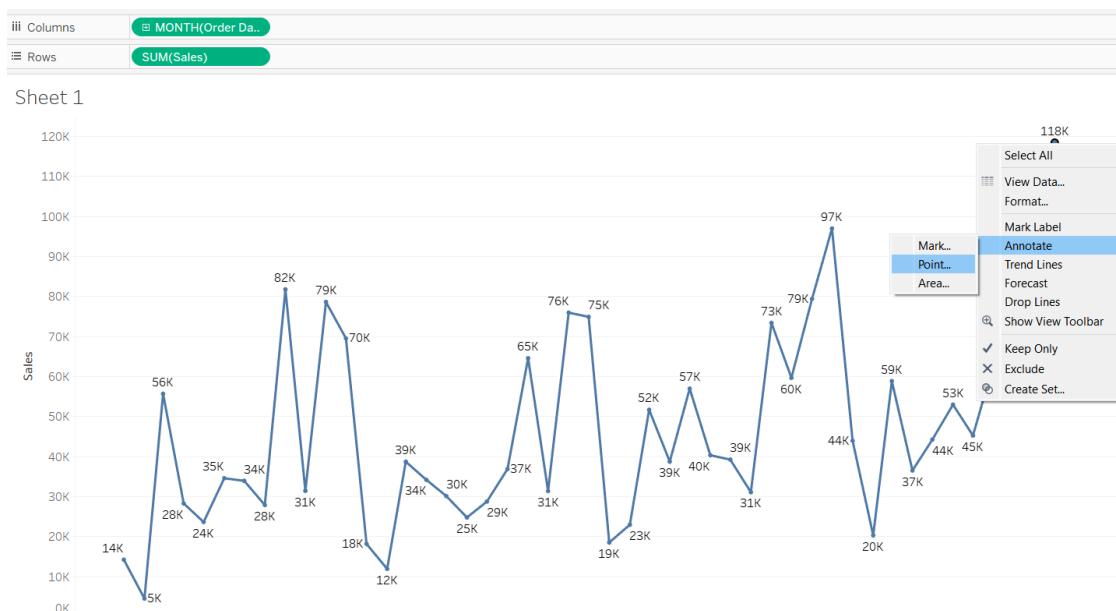
Now it looks like this ..

values chaged into k . click number: Custom. put decimal places: 0 and display unit (K)



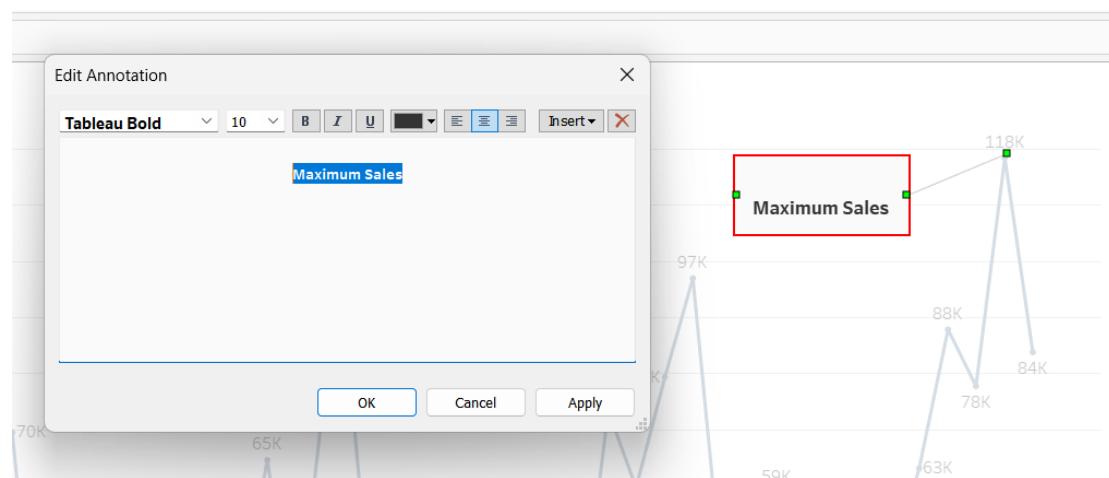
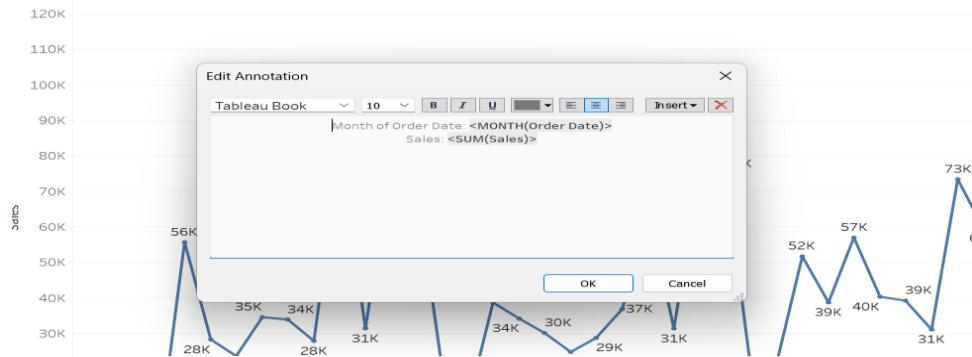
Now we will select the top and low points and write text ...

Right click on the point , select annotate -point-

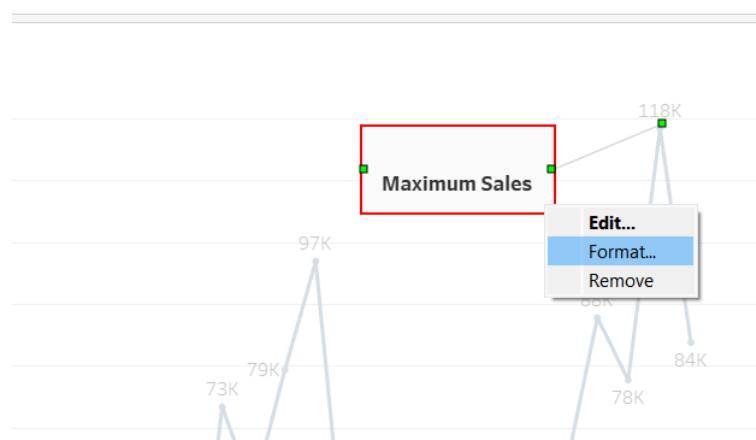


A box will appear the remove the text inside and type maximum Sales .

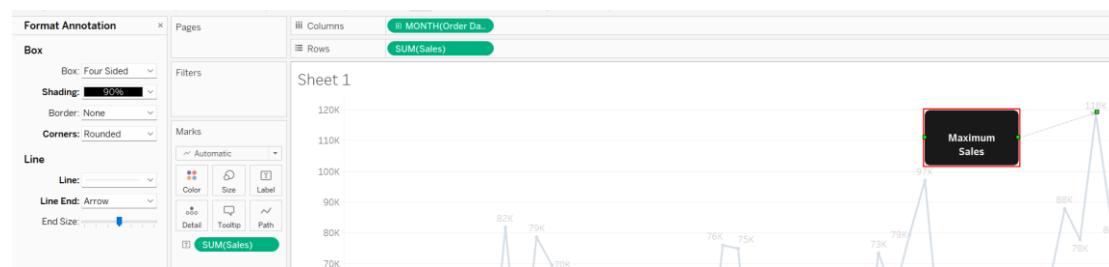
heet 1



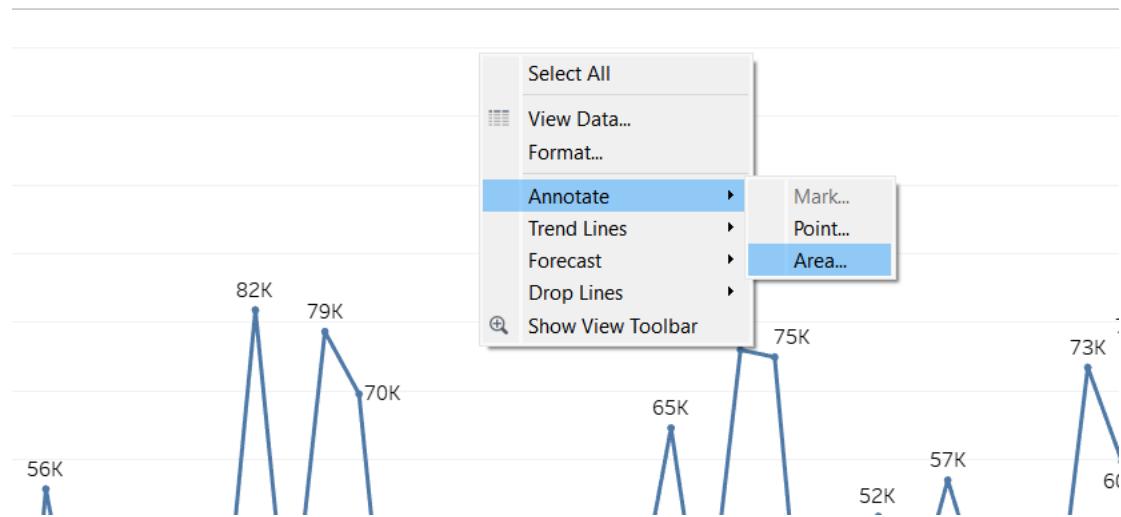
Now right click. Click on format and look at left hand side of the window.



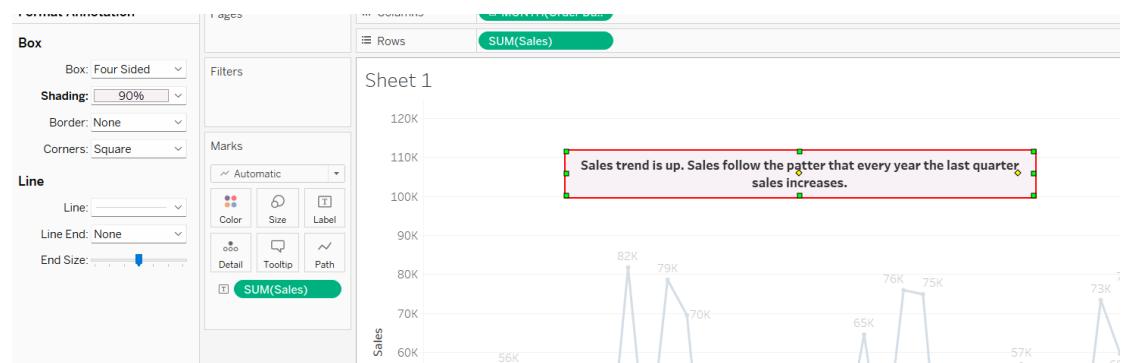
Edit setting and customize from the left side.



By general observation we can see every year last quarter the sales increases.
 Right click on the white area > click on annotate > click area



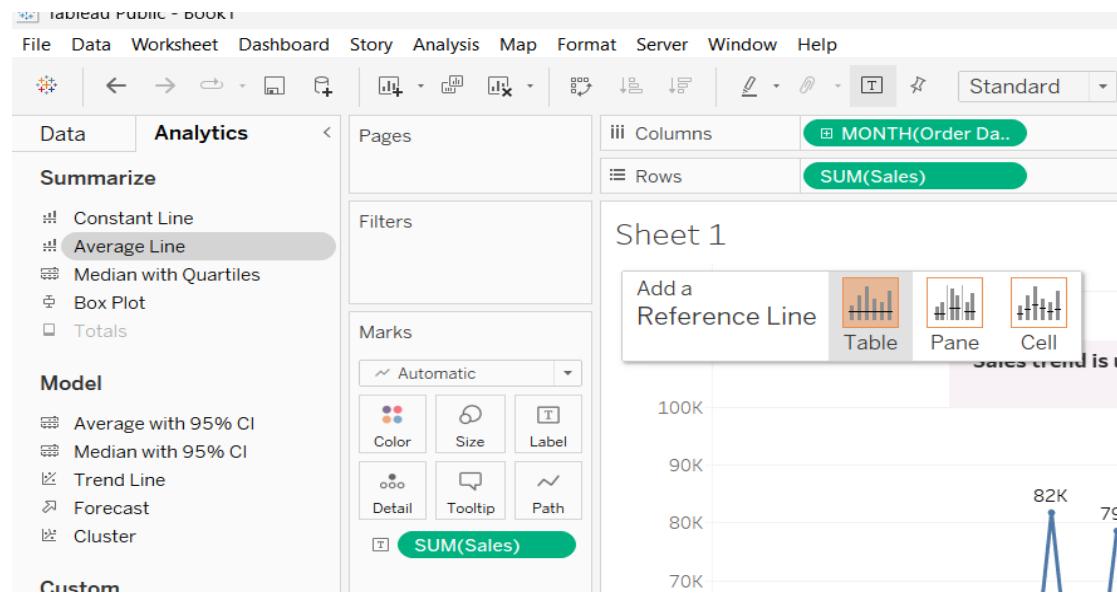
Customize :and put text ..



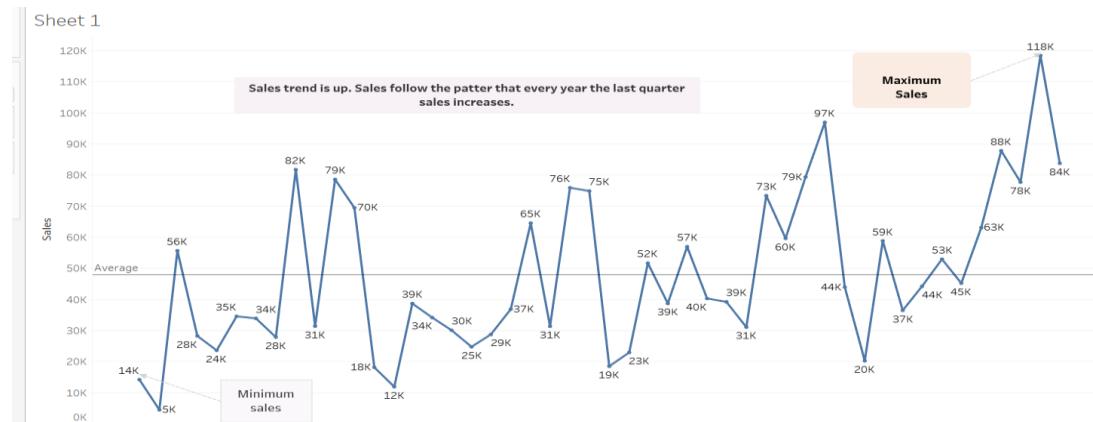
Now I want to see the mean, median , average values. I can see like below . Left side . close the box, line window. Go to the analytic to the left side after Data tab > click average line

Drag and drop >

When u going to drop drop on table ..



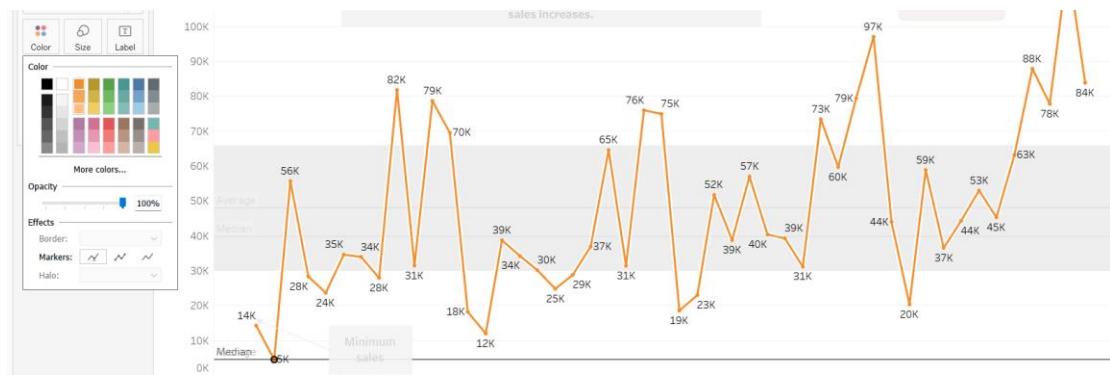
It looks like this now:



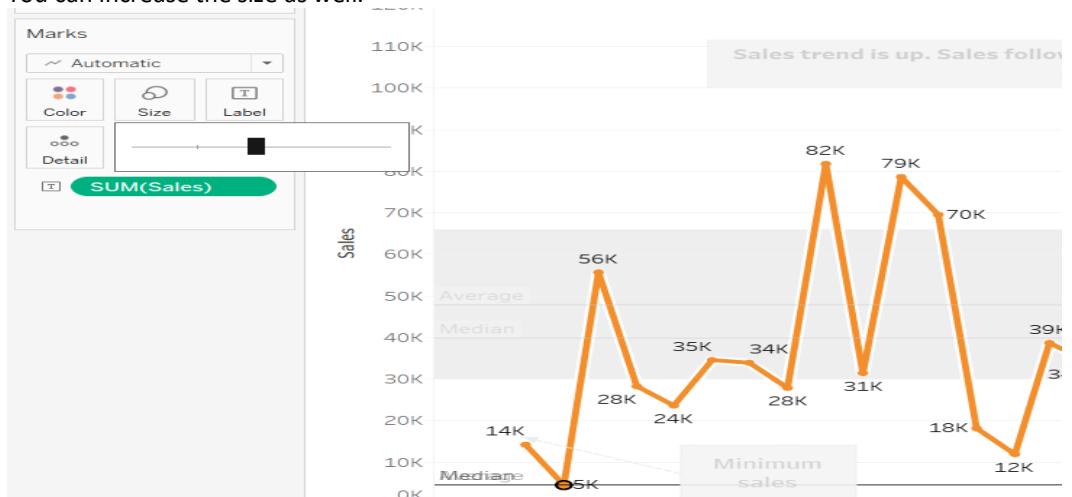
Do it with median :



For changing the line color : select the line and change the color.

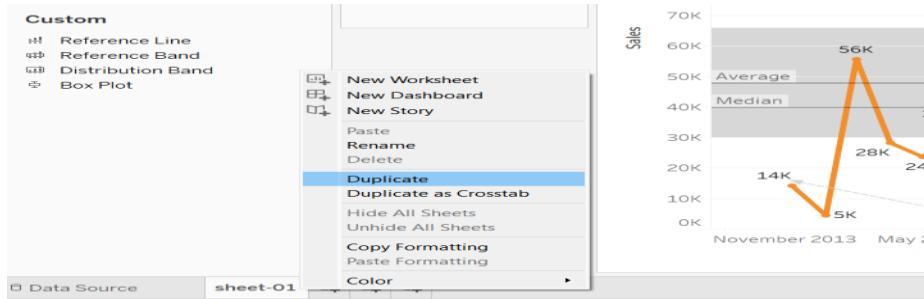


You can increase the size as well.



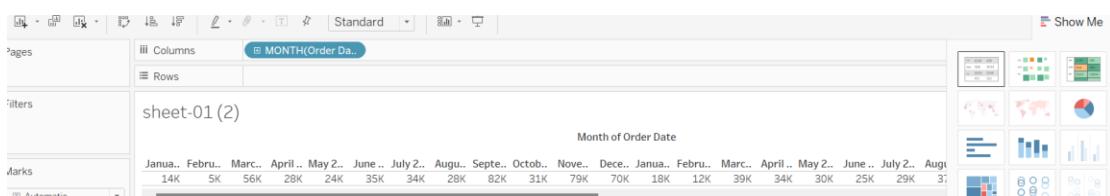
Day- 03 Tableau notes:

right click on sheet01 and click duplicate .

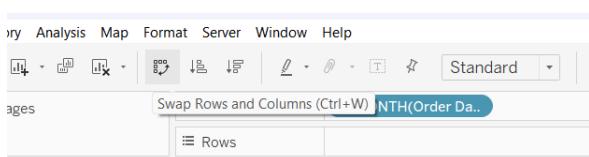


Working with "TEXT"

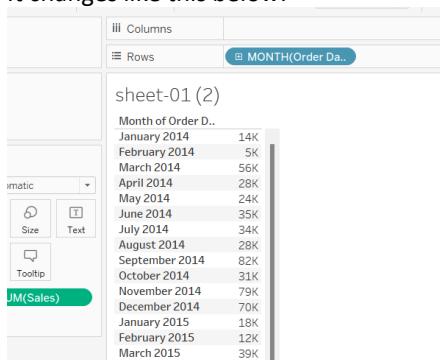
Click on show me > text



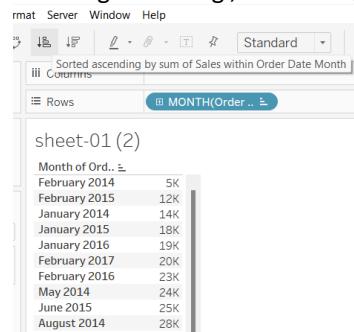
Click on swap to covert rows to columns .



It changes like this below:



For doing ascending , descending:



Drag "Order Date" to filter to see the matching columns .. > click on moth/year > click next

The screenshot shows the Tableau Data pane on the left with various fields listed under 'Tables'. The 'Order Date' field is selected and highlighted in green. On the right, a 'Filter Field [Order Date]' dialog box is open, titled 'sheet-01 (2)'. The dialog asks 'How do you want to filter on [Order Date]?'. Under the 'Range of Dates' section, the 'Years' option is selected. A list of months from January 2014 to November 2014 is displayed as checkboxes. At the bottom of the dialog are 'Next >' and 'Cancel' buttons.

Click : use all> click top>

The screenshot shows the Tableau interface with a data table on the left and a 'Filter [Month, Year of Order Date]' dialog box on the right. The dialog has three tabs: 'General', 'Condition', and 'Top'. The 'General' tab is selected, showing the 'Select from list' radio button is selected. Below it is a list of months from January 2014 to November 2014, each with a checkbox. The 'All' button is highlighted. The 'Summary' section at the bottom shows 'Field: [Month, Year of Order Date]', 'Selection: Selected 0 of 48 values', 'Wildcard: All', 'Condition: None', and 'Limit: None'. At the bottom of the dialog are 'Reset', 'OK', 'Cancel', and 'Apply' buttons. The data table on the left shows monthly sales figures from February 2014 to June 2017.

Click top> 10 (to see the top 10 values)

The screenshot shows the Tableau interface with a data table on the left and a 'Filter [Month, Year of Order Date]' dialog box on the right. The dialog has three tabs: 'General', 'Condition', and 'Top'. The 'Top' tab is selected, showing the 'By field:' section. It has dropdown menus for 'Top' (set to 10), 'by' (set to 'Sales'), and 'Sum' (under 'Sales'). Below this is the 'By formula:' section with a similar setup. At the bottom of the dialog are 'Reset', 'OK', 'Cancel', and 'Apply' buttons. The data table on the left shows monthly sales figures from February 2014 to June 2017.

It looks like this :

And if I want to increase 10 values to more / less then :

Under filter (by down arrow) > click on order date > edit filter > then change the number 10 to whatever you write

..... Using Heat MAP ----->>>->>>>>>>>>

Now we will create another duplicate of sheet 1. and go to “show me” and use heat map .

Swap it.

Swapped. looks like this.. it shows.. the sales is high squares are high. It sales is less the square is less ... next picture is descending order . did it by clicking descending .

sheet-01 (3)

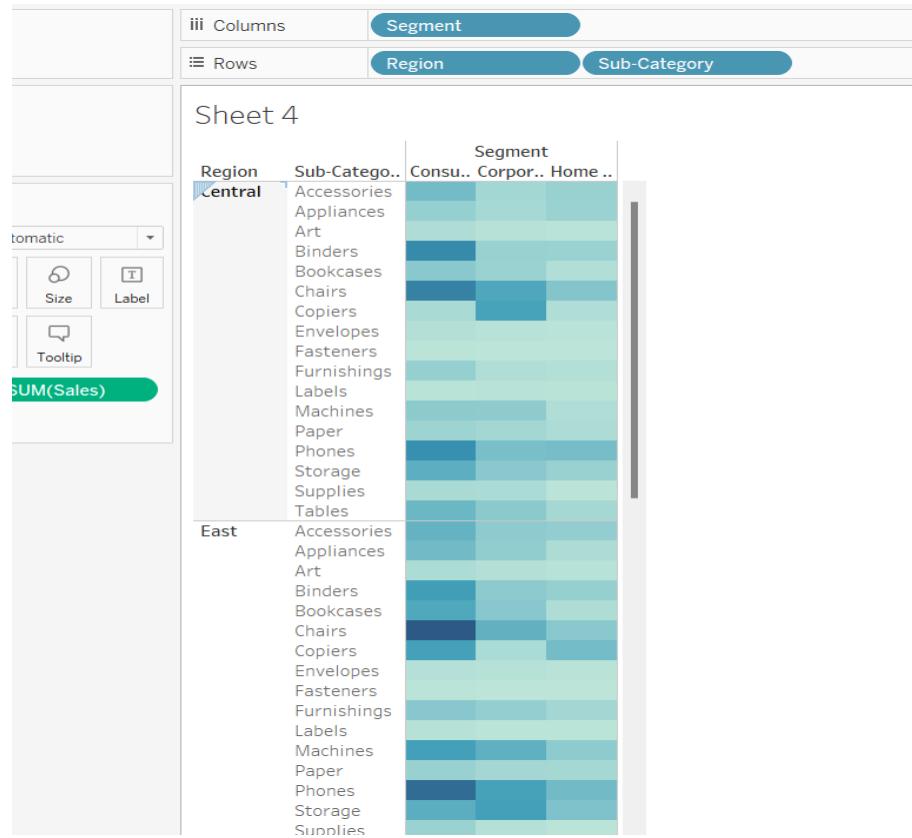
Month of Order Date

J. F. M. A. M. J. J. A. S. O. N. D. J. F. M. A. M. J. J. A. S. O. N. D. J. F. M. A. M. J. J. A. S. O. N. D.
January 2014
February 2014
March 2014
April 2014
May 2014
June 2014
July 2014
August 2014
September 2014
October 2014
November 2014
December 2014
January 2015
February 2015
March 2015
April 2015
May 2015
June 2015
July 2015
August 2015
September 2015
October 2015
November 2015
December 2015
January 2016
February 2016
March 2016
April 2016
May 2016
June 2016
July 2016
August 2016
September 2016
October 2016

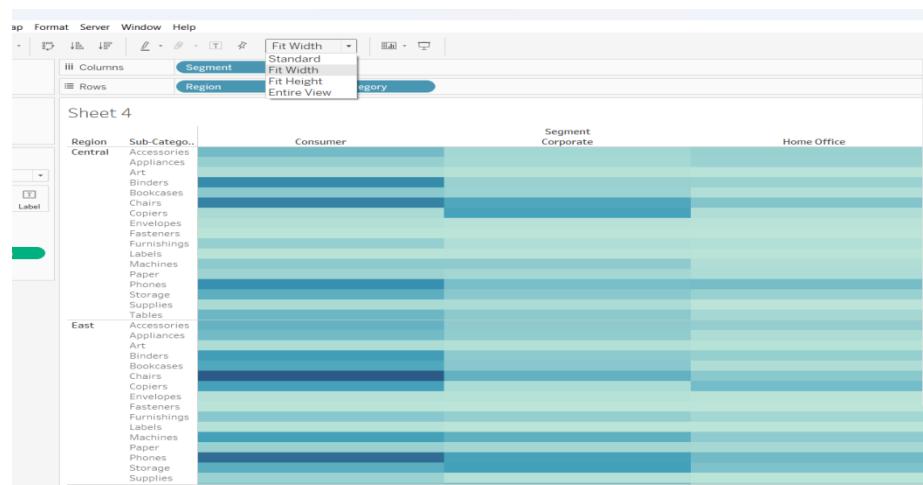
1.Creating a new sheet : going to bottom click on + sign besides the sheets .

2.Drag the “segment” to the columns. “Region” to the rows. Drag the “sub category” and put it beside the region (rows) .

3. Drag sales and put in to colors .

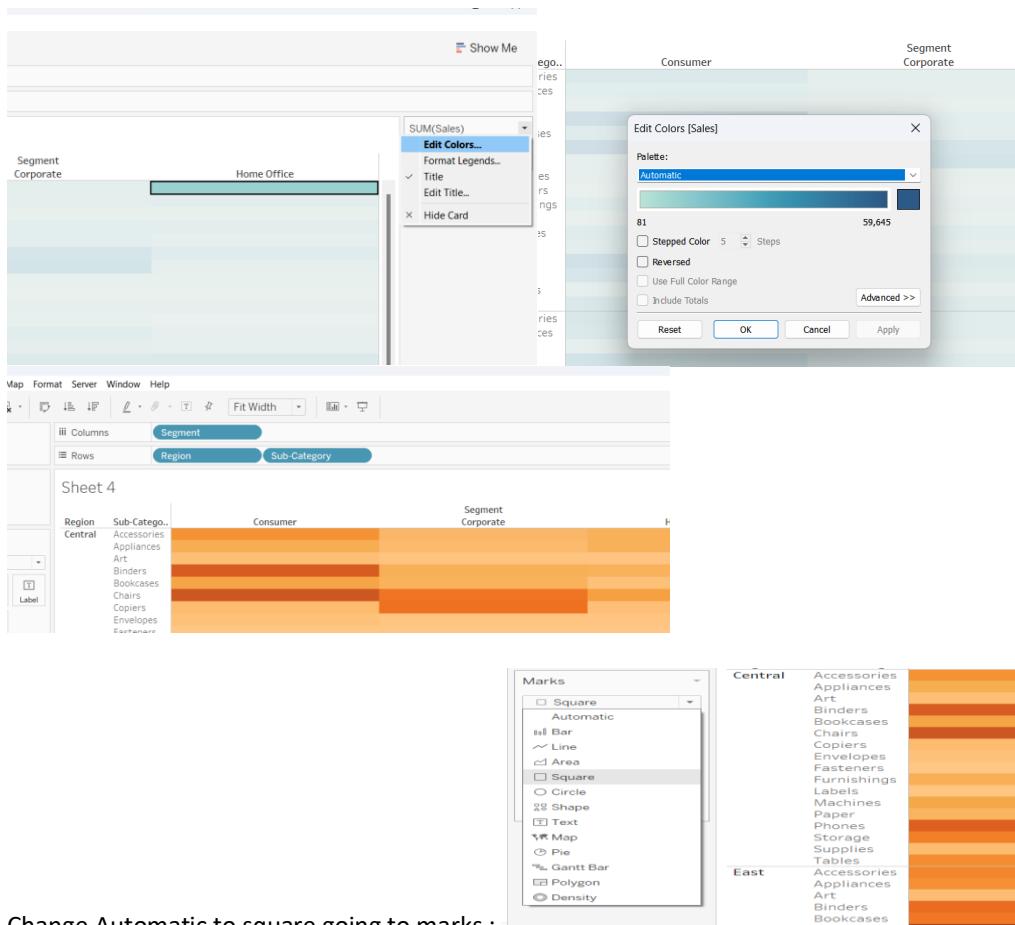


Click on “Fit width” . it will wide the view



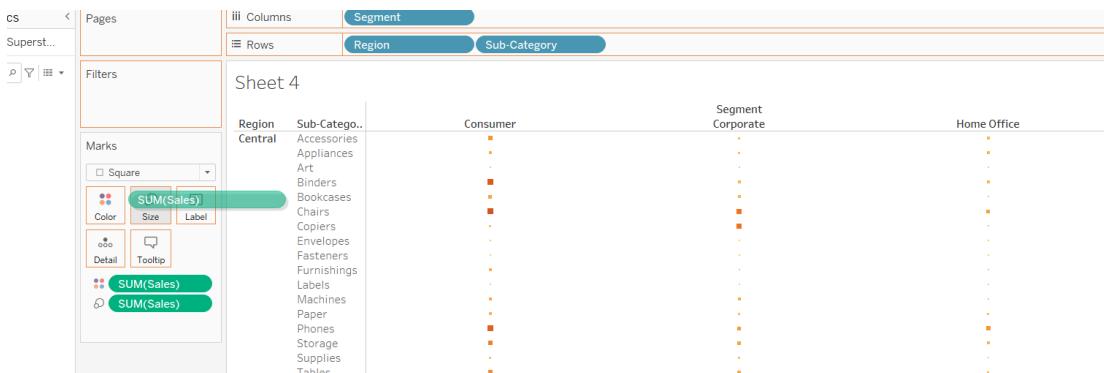
We can find out deep color means maximum sales. Light color is less sales . If we want we can change the color.

We can go to down arrow key> click edit color >



Change Automatic to square going to marks :

Drag "sales" put it to size :

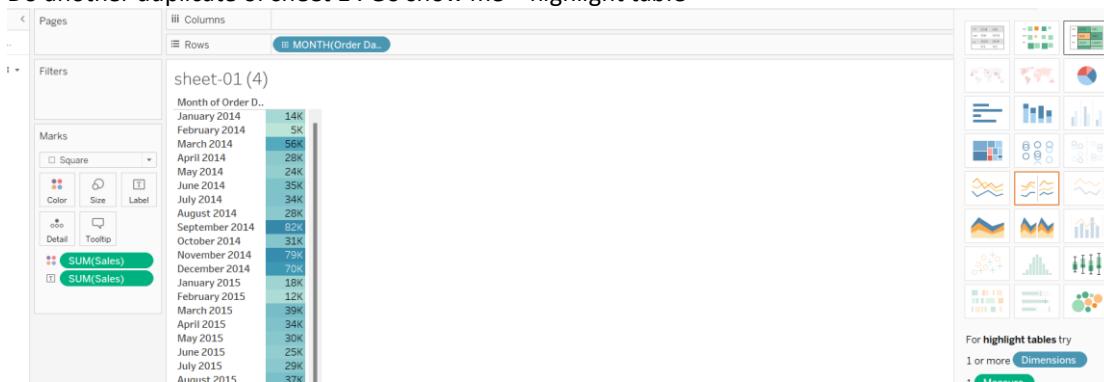


For increasing size > click on size and > increase

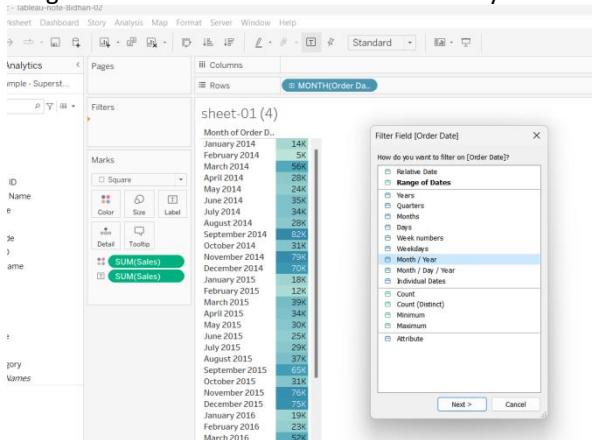


Working with Highlight table>>>>>>>>>>>>

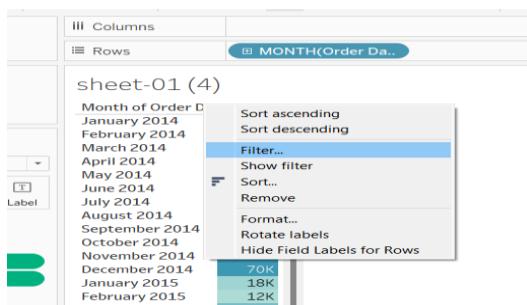
Do another duplicate of sheet 1 . Go show me > highlight table



Drag the order date to filter. > select month year



For showing the 10 values. Follow this : right click > filter > top > by field > 10

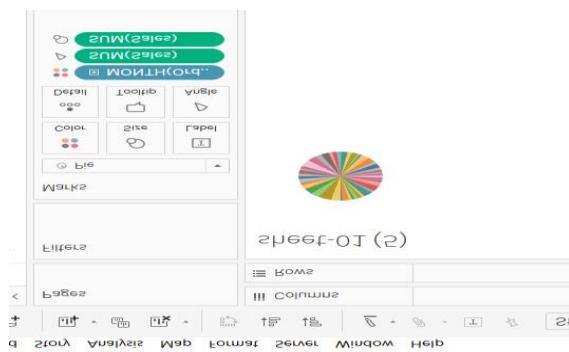


Working with PIE Chart>>>>>>>>>>>>

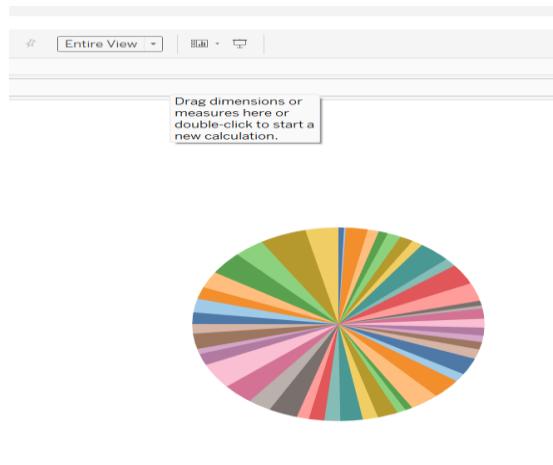
Take duplicate of page 4. take out the filter . it will look like the 2nd pic . maximize the value.



It will look like this :

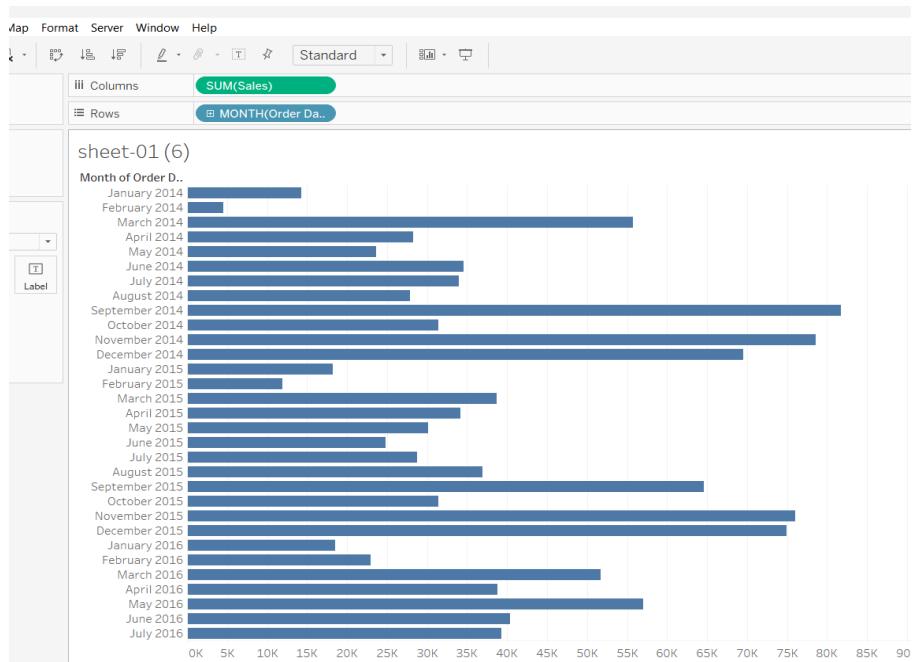


Hit : Entire view ..



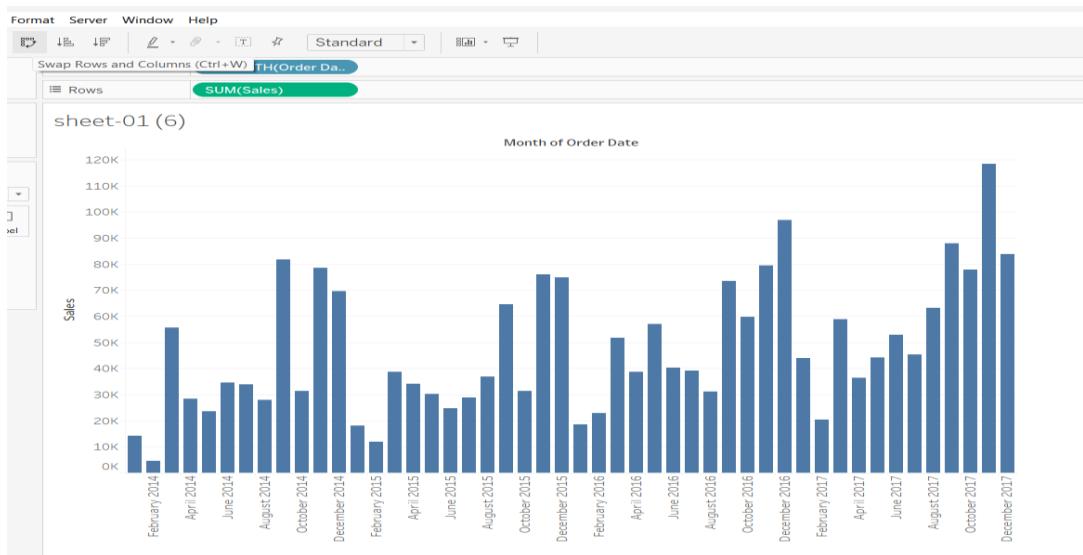
Horizontal bar chart>>>>>>>>>>

Go to sheet 1. create another duplicate.... convert it to the horizontal bar chart

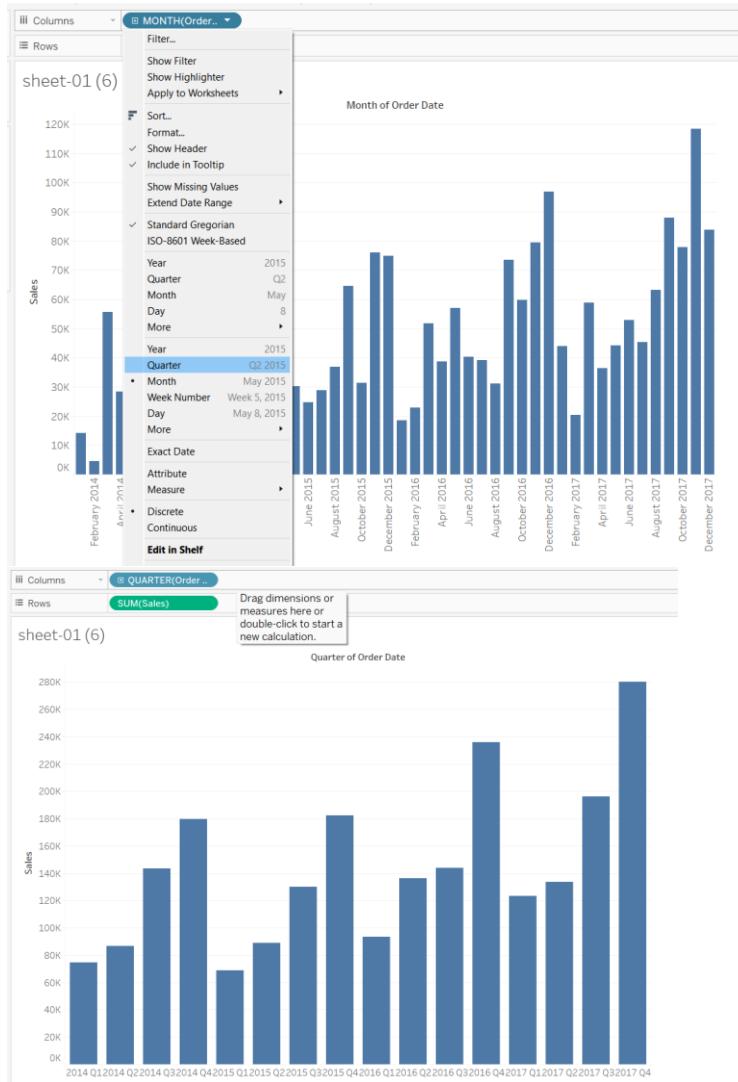


Bar chart is to compare the values

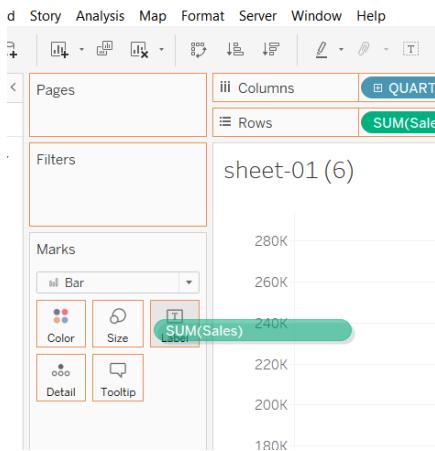
Now I am swapping the values of the bar chart ..



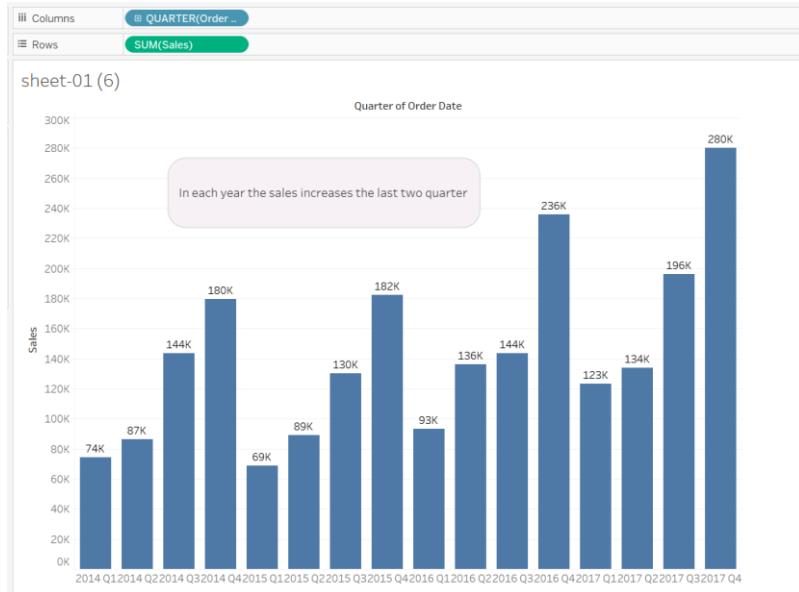
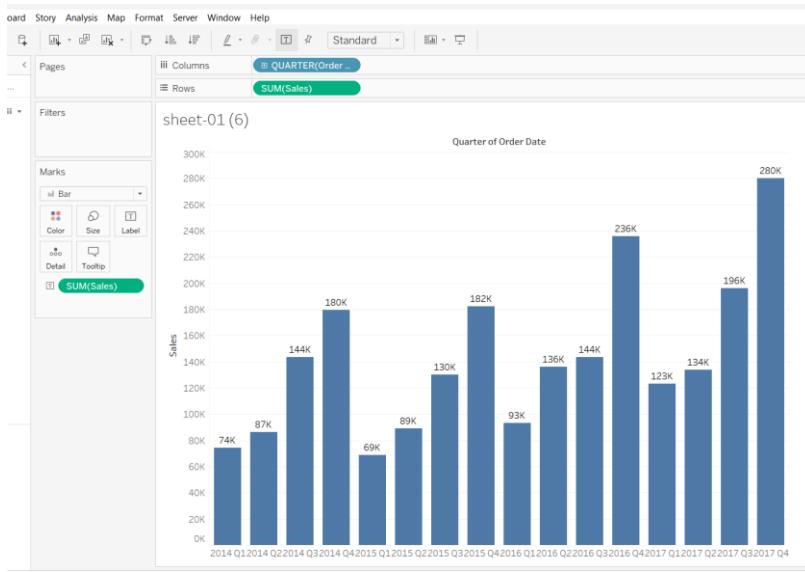
I want to see the quarter report : click on month > click quarter



Drag the sales and put it to the labels

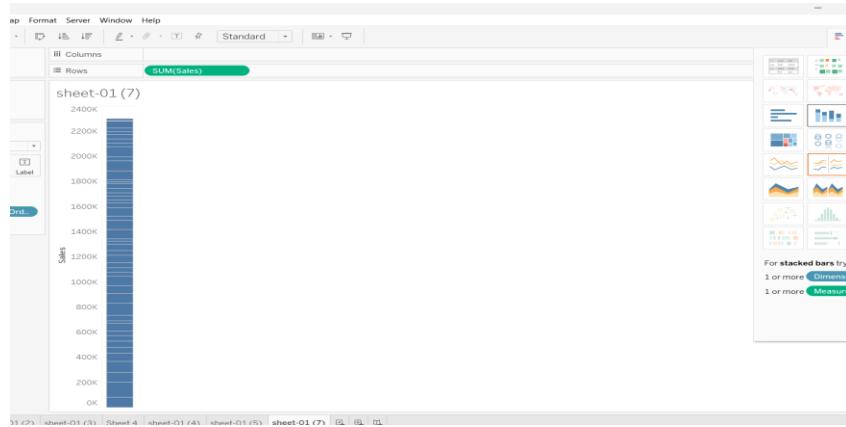


It will look like this with the values ..



Working with stack bar>>>>>>>>>>>>>

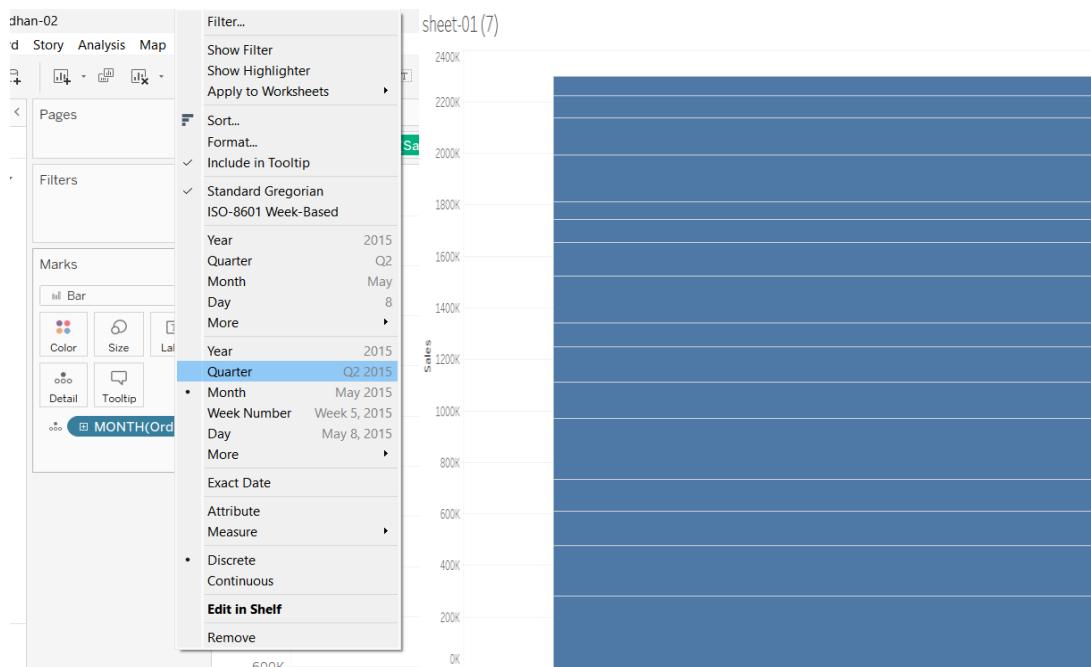
Take duplicate of sheet one ... go show me > stack bar



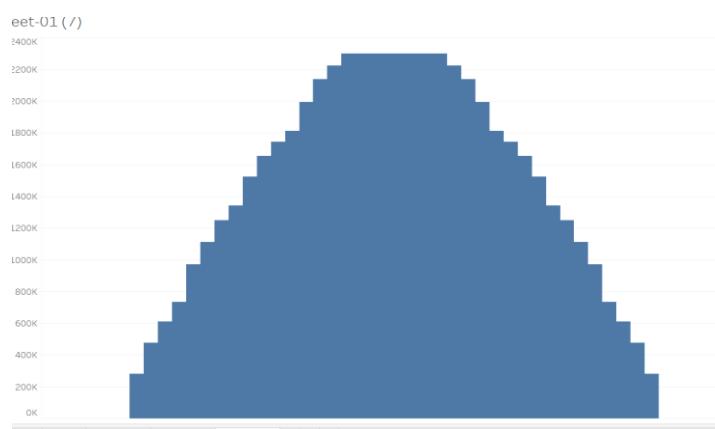
Select entire view changing standard ..to get it for the full screen,,



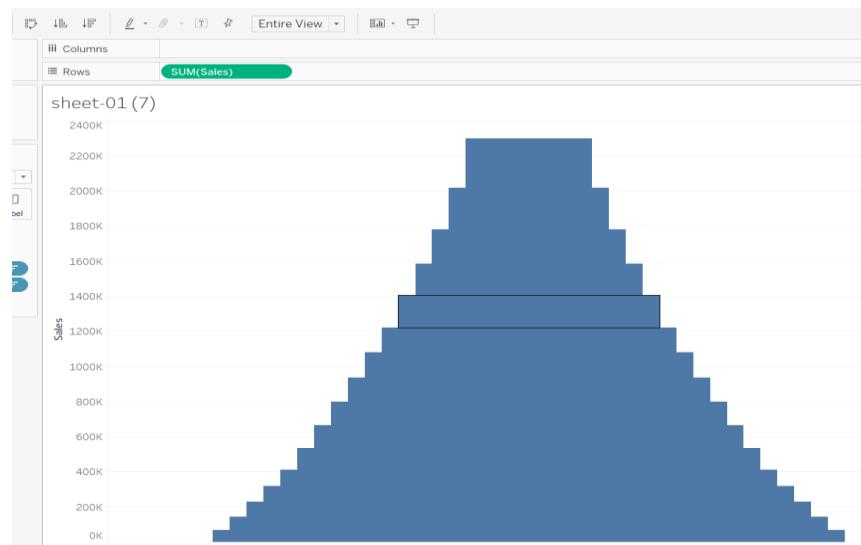
Click on : quarter to see the quarter values.



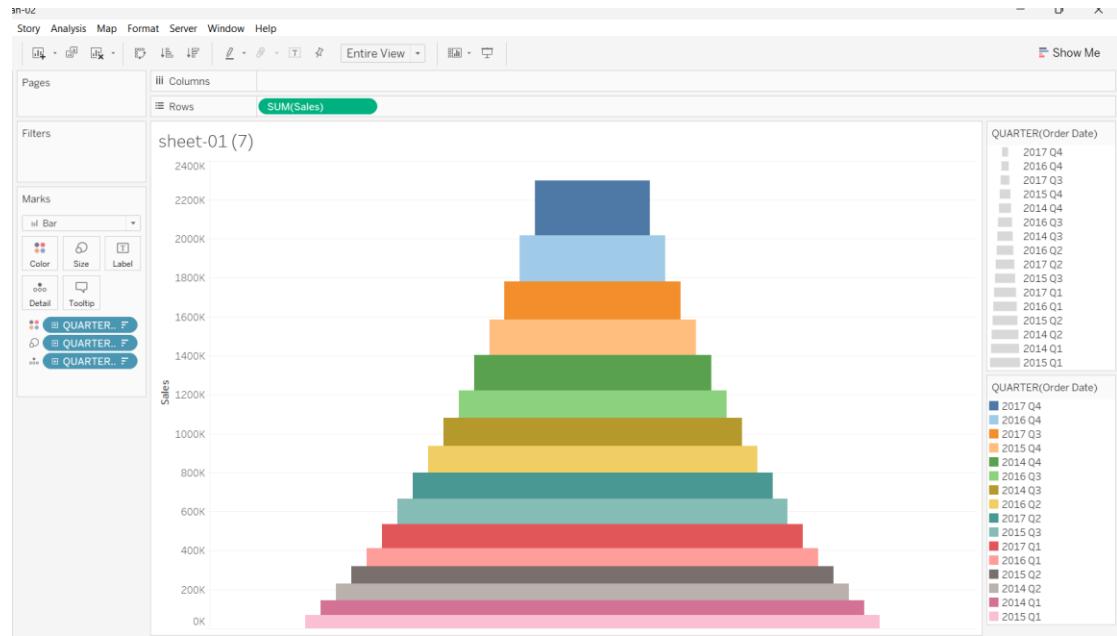
Control drag and drop below ((quarter)) from marks. Put the quarter into the size : stack bar looks like this below:



We can change the shape pressing ascending, descending and swap button.

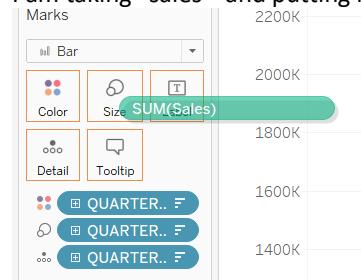


Control Drag and drop quarter .Drag and drop the quarter into to color :

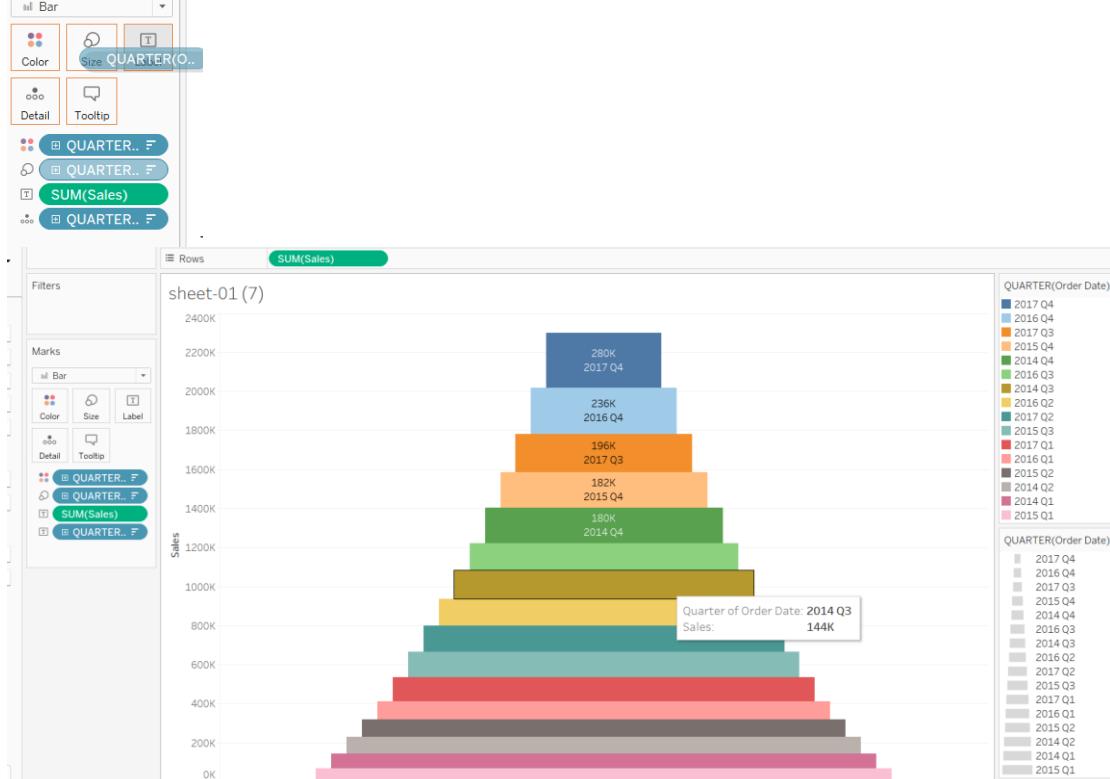


I can do ascending, depending if I want with the above pic and it can change shapes then .

I am taking "sales" and putting it to the label ..

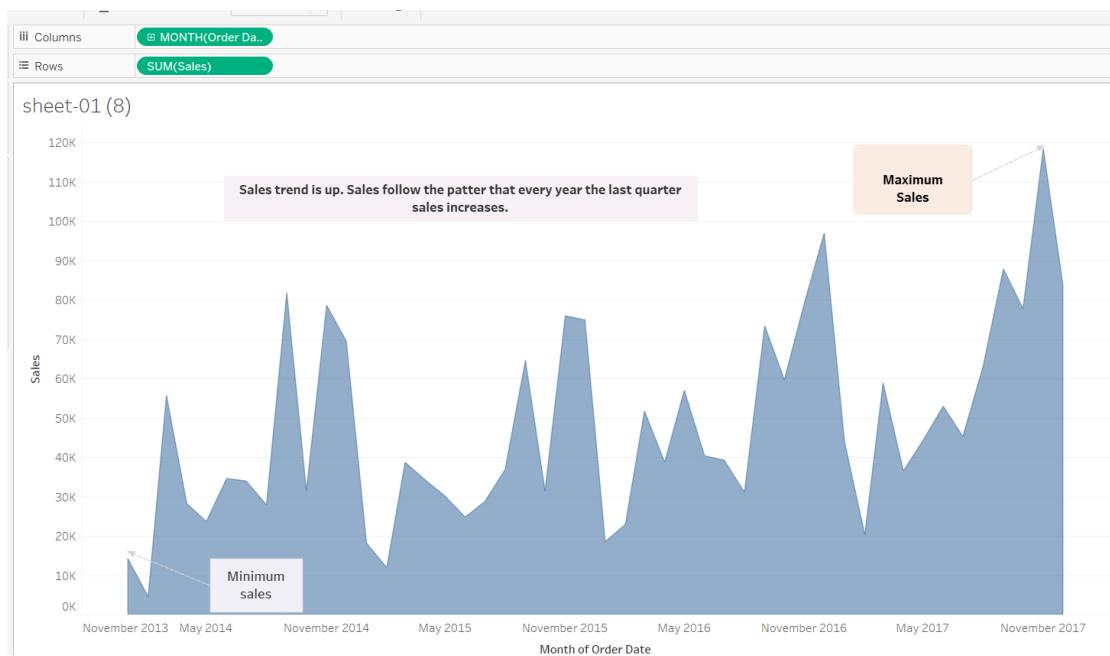


Drag the quarter and put into label.



We work with area chart>>>>

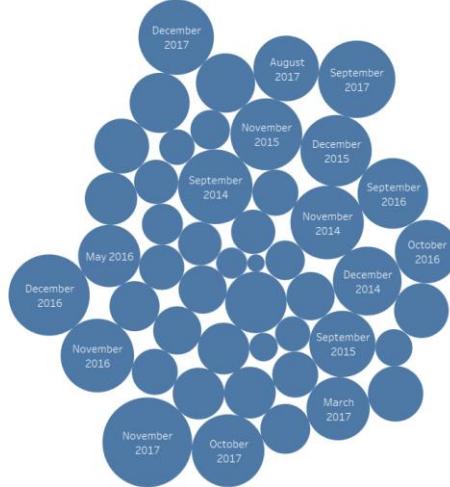
Take another duplicate of Sheet 1 . click > area chart



Working withpacked bubbles >>>

Take another duplicate of Sheet 1 . click > packed bubbles .

sheet-01 (8)

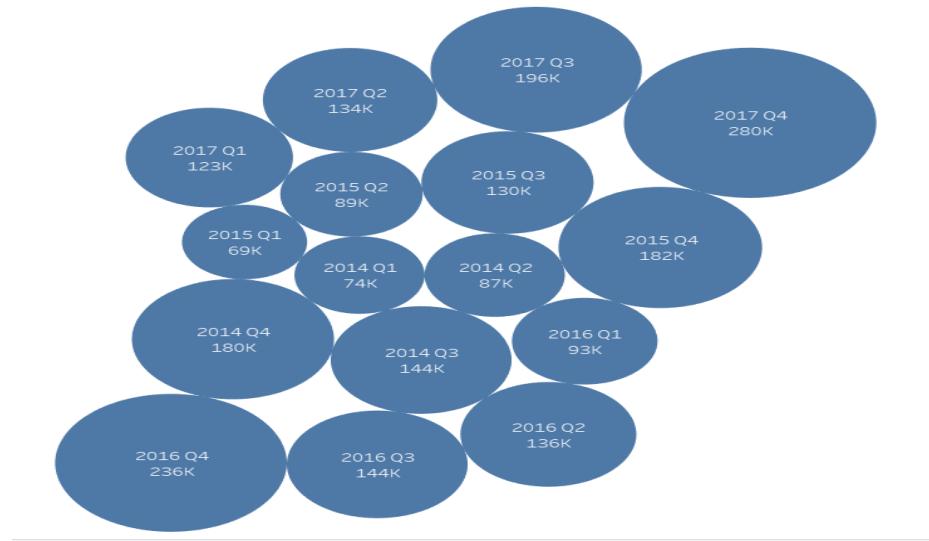


Change month to quarter

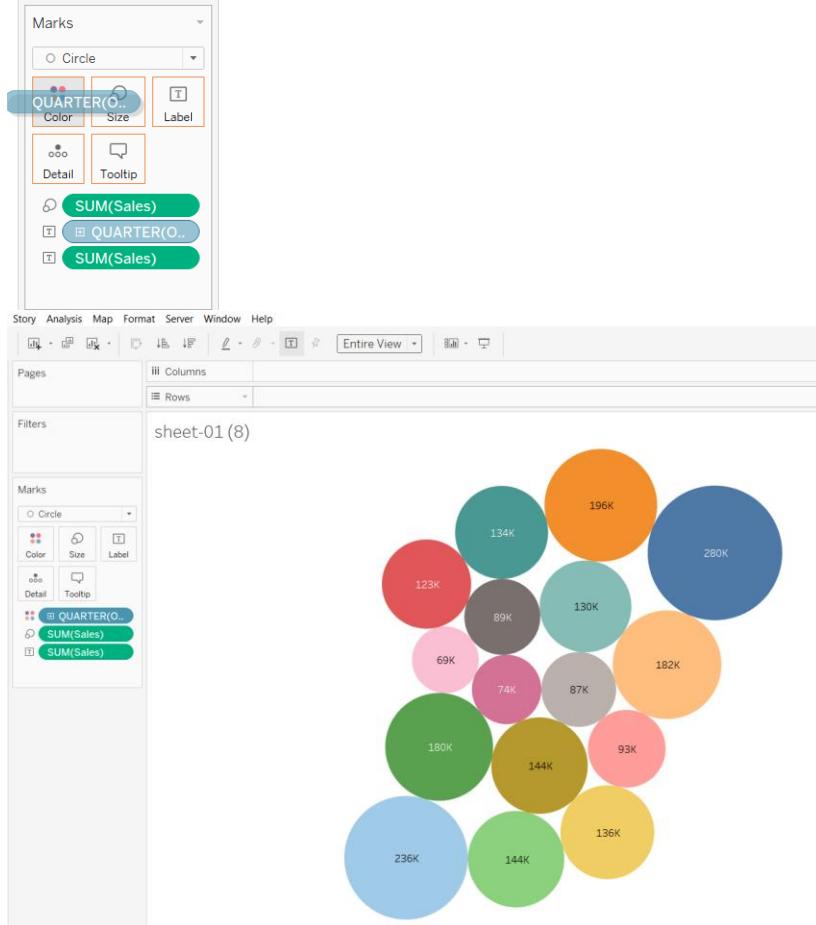


Drag the sales and put it on label

sheet-01 (8)

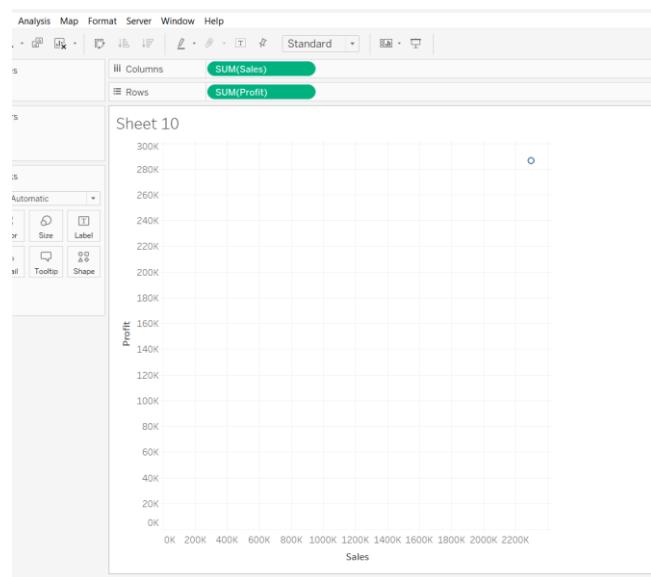


Take the quarter and put it into the color. And change it selecting entire value.

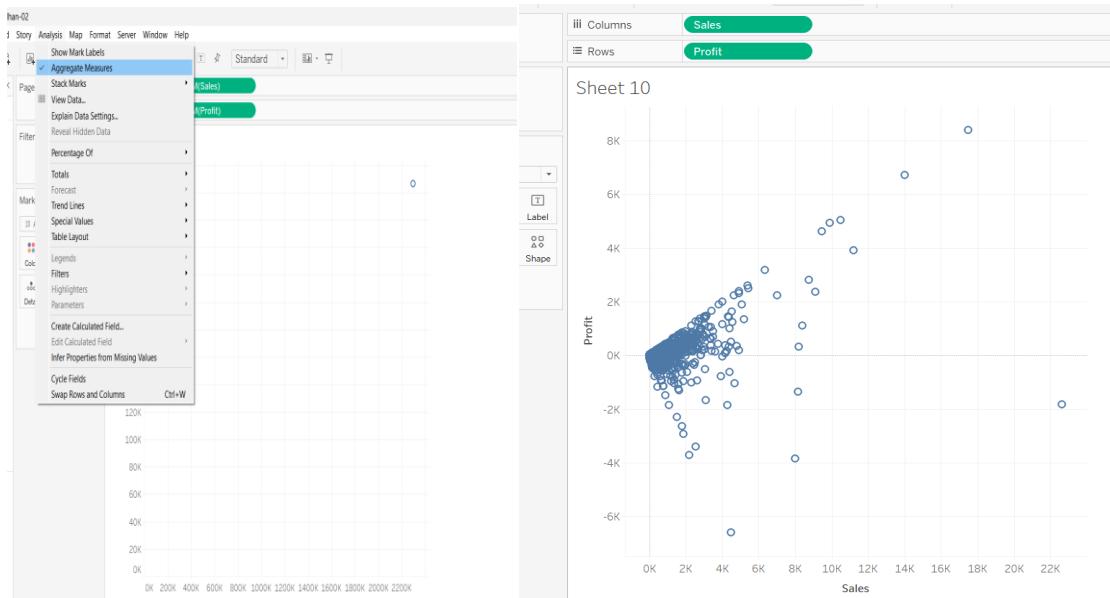


[Create a new worksheet . we will see the relationship between sales and profit . Scatter plot ..>>>](#)

Drag and drop sales and profit into column and row .



We can only see one data point . so we will go to analysis tab of menu > dis-select aggregate measures.



We can see multiple points . we go and change the point to circle. Click > entire view



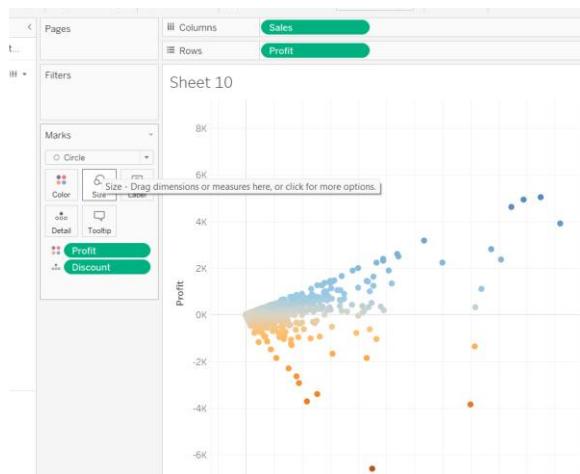
We can look for out layer which is above is average.

Lets see the discount. Drag and drop it to the “Detail”



So, we can get the information that the discount is killing the profit.

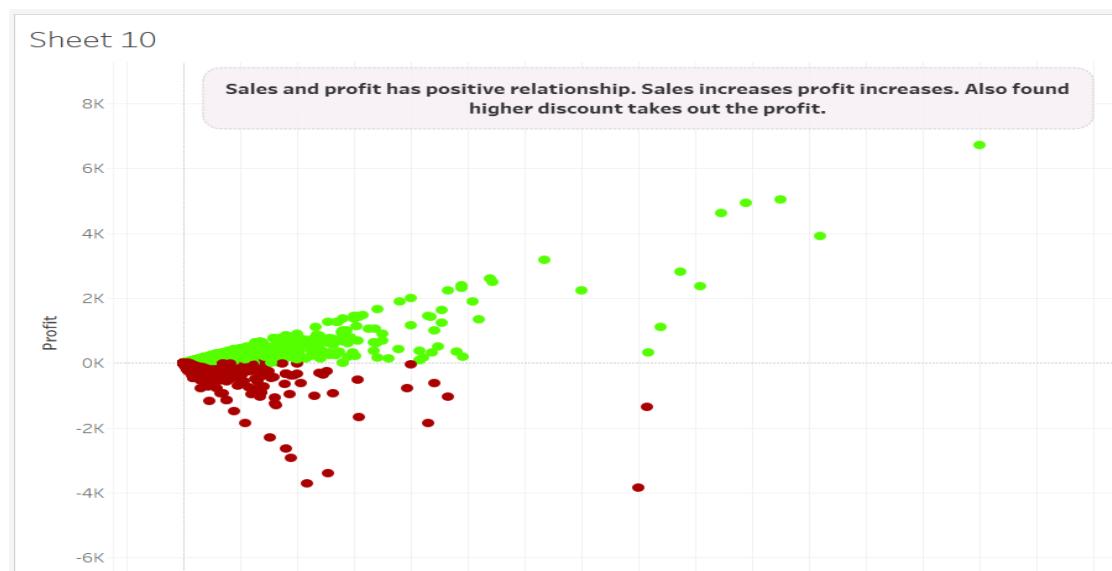
Let's take the "profit" and drop it to the color.. Drag and drop.



It took the default color so I want to change the color ... go right edit color and change it if u want to change. Select step color:2 to have only 2 colors .



Input text ... by right clicking to the white portion> select annotate > area > write text



Now we will see the discount and profit relationship ...

Duplicate the worksheet of the sheet 10 / just worked for (Sales and profit) take out Sales and add / drop Discount on that place

It looks like below :



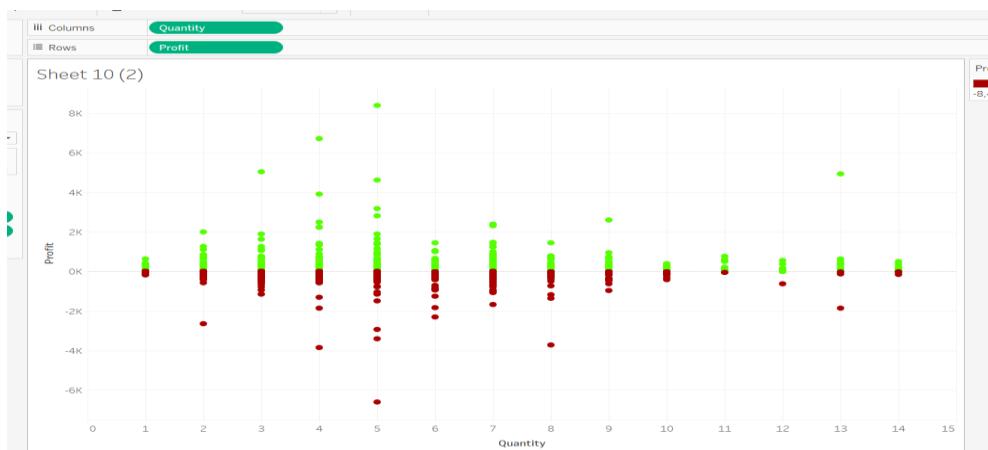
Now we figure out is there any relationship between profit and discount ..
If yes what type of relationship

A negative relationship .. Why >>> Discount increases profit decreases.



Now we will see the discount and quantity relationship ...

We will see if there is any relationship between them. We do a duplicate sheet in this . take out discount and drop "Quantity" . So we find it out there is no co-relationship between them.



Take a new worksheet . We will do our own customization .

I want to know what is the percentage of profit / profit margin >>>>>>>>

So to do that we have to do profit/ (divided) Sales.

So, we have to do a new calculated column. Create calculated field.

The screenshot shows the Tableau interface with the 'Data' tab selected. In the top right, there's a 'Create Calculated Field...' dialog box open. Inside, the formula $[Profit] / [Sales]$ is entered. Below the formula, a message says 'The calculation is valid.' At the bottom right of the dialog are 'Apply' and 'OK' buttons. The main workspace shows a single sheet titled 'Sheet 12' with a count of 1,202 rows.

Now I want to know the overall profit margin . Drag the profit margin to text. Click measure> average

This screenshot shows the 'Marks' shelf on the right side of the interface. A context menu is open over a 'SUM(Profit Me...)' item, which is highlighted in green. The menu path 'Measure (Sum) > Average' is highlighted. Other options in the menu include 'Sum', 'Median', 'Count', 'Count (Distinct)', 'Minimum', 'Maximum', 'Percentile', 'Std. Dev', 'Std. Dev (Pop.)', 'Variance', and 'Variance (Pop.)'. The main workspace shows the same 'Sheet 12' with 1,202 rows.

This screenshot shows the final visualization. The 'Marks' shelf now displays 'AVG(Profit Mer...)' in green. The main workspace shows the value '0.1203' for 'Sheet 12'. The interface includes a 'Filters' shelf on the left and a 'Pages' shelf at the top.

Now we see the average.

1. Now click on format. It looks like this ...

The screenshot shows the 'Format AVG(Profit Merge)' dialog. On the left, there are sections for Default, Totals, Grand Totals, and Special Values. On the right, there are Pages, Filters, and Marks settings. A context menu is open over the 'Text' button in the Marks section, with 'Format...' selected. Other options in the menu include 'Include in Tooltip', 'Dimension Attribute', 'Measure (Average)', 'Discrete', 'Continuous', 'Edit in Shelf', 'Add Table Calculation...', 'Quick Table Calculation...', and 'Remove'.

2. 2. and for having Percent ...

The screenshot shows the same 'Format AVG(Profit Merge)' dialog as above. The context menu is still open over the 'Text' button. This time, the 'Percentage' option under the 'Number' section is selected. The 'Decimal places:' field is set to 2. The rest of the dialog and its content remain the same as in the first screenshot.

Total Customers: Create a new sheet . drag customer id and drop it to the label / text.

The screenshot shows the Tableau interface with a dimension named 'CNTD(Custom...)' selected. A context menu is open, showing options like 'Filter...', 'Show Filter', 'Apply to Worksheets', 'Format...', 'Include in Tooltip' (which is checked), 'Dimension', 'Attribute', and a 'Measure' section. The 'Measure' section is expanded, showing 'Count (Distinct)' selected. Other options in the 'Measure' section include 'Discrete' and 'Continuous'. Below the 'Measure' section are 'Edit in Shelf', 'Add Table Calculation...', 'Quick Table Calculation...', and 'Remove'.

Distinct is unique .. One customer can order multiple times but the unique customer number comes when u select distinct.

The screenshot shows the Tableau interface with a dimension named 'CNT(Customer...)' selected. A context menu is open, showing options like 'Filter...', 'Show Filter', 'Apply to Worksheets', 'Format...', 'Include in Tooltip' (which is checked), 'Dimension', 'Attribute', and a 'Measure' section. The 'Measure' section is expanded, showing 'Count' selected. Other options in the 'Measure' section include 'Discrete' and 'Continuous'. Below the 'Measure' section are 'Edit in Shelf', 'Add Table Calculation...', 'Quick Table Calculation...', and 'Remove'.

Only count comes like this:

But we will go with distinct to get the unique value.

Now input text.

Sheet 13

Customers
9,994

Text: Customers <CN>

OK

Orders : Create a duplicate of this page.. Drag the order id and drop on the top of CNTD (customer)

Sheet 13 (2)

Customers
793

Text: OrderID <CN>

Customer ID	Customer Name	Customer Address	Customer City	Customer State	Customer Zip
CA-2014-100006	Customer 1	Address 1	City 1	State 1	Zip 1
CA-2014-100090	Customer 2	Address 2	City 2	State 2	Zip 2
CA-2014-100293	Customer 3	Address 3	City 3	State 3	Zip 3
CA-2014-100328	Customer 4	Address 4	City 4	State 4	Zip 4
CA-2014-100363	Customer 5	Address 5	City 5	State 5	Zip 5
CA-2014-100391	Customer 6	Address 6	City 6	State 6	Zip 6
CA-2014-100678	Customer 7	Address 7	City 7	State 7	Zip 7
CA-2014-100706	Customer 8	Address 8	City 8	State 8	Zip 8
CA-2014-100762	Customer 9	Address 9	City 9	State 9	Zip 9
CA-2014-100860	Customer 10	Address 10	City 10	State 10	Zip 10
CA-2014-100867	Customer 11	Address 11	City 11	State 11	Zip 11
CA-2014-100881	Customer 12	Address 12	City 12	State 12	Zip 12
CA-2014-100895	Customer 13	Address 13	City 13	State 13	Zip 13
CA-2014-100916	Customer 14	Address 14	City 14	State 14	Zip 14
CA-2014-100972	Customer 15	Address 15	City 15	State 15	Zip 15
CA-2014-101147	Customer 16	Address 16	City 16	State 16	Zip 16
CA-2014-101175	Customer 17	Address 17	City 17	State 17	Zip 17
CA-2014-101266	Customer 18	Address 18	City 18	State 18	Zip 18
CA-2014-101364	Customer 19	Address 19	City 19	State 19	Zip 19
CA-2014-101392	Customer 20	Address 20	City 20	State 20	Zip 20
CA-2014-101427	Customer 21	Address 21	City 21	State 21	Zip 21
CA-2014-101462	Customer 22	Address 22	City 22	State 22	Zip 22
CA-2014-101476	Customer 23	Address 23	City 23	State 23	Zip 23
CA-2014-101560	Customer 24	Address 24	City 24	State 24	Zip 24
CA-2014-101602	Customer 25	Address 25	City 25	State 25	Zip 25
CA-2014-101770	Customer 26	Address 26	City 26	State 26	Zip 26
CA-2014-101833	Customer 27	Address 27	City 27	State 27	Zip 27
CA-2014-102008	Customer 28	Address 28	City 28	State 28	Zip 28
CA-2014-102085	Customer 29	Address 29	City 29	State 29	Zip 29
CA-2014-102274	Customer 30	Address 30	City 30	State 30	Zip 30
CA-2014-102295	Customer 31	Address 31	City 31	State 31	Zip 31
CA-2014-102330	Customer 32	Address 32	City 32	State 32	Zip 32
CA-2014-102645	Customer 33	Address 33	City 33	State 33	Zip 33
CA-2014-102652	Customer 34	Address 34	City 34	State 34	Zip 34
CA-2014-102673	Customer 35	Address 35	City 35	State 35	Zip 35
CA-2014-102869	Customer 36	Address 36	City 36	State 36	Zip 36
CA-2014-102988	Customer 37	Address 37	City 37	State 37	Zip 37
CA-2014-103058	Customer 38	Address 38	City 38	State 38	Zip 38
CA-2014-103086	Customer 39	Address 39	City 39	State 39	Zip 39
CA-2014-103100	Customer 40	Address 40	City 40	State 40	Zip 40
CA-2014-103191	Customer 41	Address 41	City 41	State 41	Zip 41
CA-2014-103219	Customer 42	Address 42	City 42	State 42	Zip 42
CA-2014-103310	Customer 43	Address 43	City 43	State 43	Zip 43
CA-2014-103317	Customer 44	Address 44	City 44	State 44	Zip 44

Next:

Marks

OrderID

Count(Distinct)

Change the text to orders:

Sheet 13 (2)

Orders
5,009

Text: OrderID <CN>

OK

Sheet 13 (2)

Orders
5,009

Sales: Create a duplicate sheet of previous one then customize ..
 Drag and drop sales and change the text

The screenshot shows the Tableau interface with two panes. The left pane displays the original sheet's configuration, including filters, marks, and a calculated field 'SUM(Sales)'. The right pane shows the new sheet 'Sheet 13 (3)' with its own configuration. An 'Edit Label' dialog is open, allowing the user to modify the text label for the sheet.

Go to format: change it to Million, use prefix: \$.

This screenshot illustrates the process of formatting the sales value. On the left, the 'Format SUM(Sales)' dialog is open, showing various options like 'Default', 'Totals', and 'Grand Totals'. In the center, the 'Edit Label' dialog shows the text 'SALES 2,297,201'. On the right, another 'Format SUM(Sales)' dialog is open, specifically focusing on the 'Grand Total' section. It shows the 'Numbers' dropdown set to '\$0.12M'. A large callout box highlights the 'Currency (Custom)' section, which includes settings for 'Decimal places' (set to 2), 'Negative values' (set to '\$(1234)'), 'Display Units' (set to 'Millions (M)'), and a checked 'Prefix / Suffix' option with a '\$' symbol.

Profit : Another duplicate of this page. Drag the profit and drop it on the top of sum(sales)

This screenshot shows the creation of a new sheet 'Sheet 13 (4)'. The left pane shows the original sheet's configuration. The right pane shows the new sheet 'Sheet 13 (4)' with its own configuration. An 'Edit Label' dialog is open, showing the text 'Profit <SUM(Profit)>'. The 'Edit Label' dialog has a toolbar at the top with bold, italic, underline, and other styling options. Below the toolbar, the text 'Profit <SUM(Profit)>' is displayed, with the '**Profit**' part bolded.

Format SUM(Profit)

A Axis F Fields

Default
Font: Tableau Boo.. Alignment: Automatic Numbers: \$0.12M

Totals
Font: Tableau Med.. Alignment: Automatic Numbers: \$0.12M

Grand Totals

.....

Sheet 13 (4)

Profit

\$0.29M

Profit margin: Lets figure our profit margin. Take the duplicate sheet ..create calculated field .

Data Analytics

Orders (Sample - Superst...)

Search Create Calculated Field...

Drag and drop the profit margin into sum(profit)

Profit Margin

[Profit]/[Sales]

The calculation is valid.

1 Dependency

Apply OK

.....

Pages iii Columns

Filters Rows

Sheet 13 (5)

Profit

1,202

Marks

Automatic

Color Size Text

Detail Tooltip

SUM(Profit Ma..)

Measure (Sum)

Sum Average Median

Sheet 13 (5)

Profit

1,202

Pages iii Columns

Filters Rows

Sheet 13 (5)

Profit

0.1203

Axis F Fields

Default
Font: Tableau Boo.. Alignment: Automatic Numbers: 123,456

Totals
Font: Tableau Med.. Alignment: Automatic Numbers: 123,456

Grand Totals
Font: Tableau Med.. Alignment: Automatic Numbers: 123,456

Special Values (eg. NULL)
Text: (Blank) Marks: Show at Indi...

Sheet 13
Profit
0.1203

Filters

Marks

Automatic

Color Size Text

Detail Tooltip

Avg(Profit Mar..)

Measure (Average)

Discrete Continuous

Edit in Shelf

Add Table Calculation... Quick Table Calculation... Remove

Pages iii Columns

Filters Rows

Sheet 13 (5)

Profit

12.03%

A Axis F Fields

Default
Font: Tableau Boo.. Alignment: Automatic

Totals
Font: Automatic Alignment: Automatic
Numbers: 12345600...

Format AVG(Profit Margi...

Font... Alignment: Automatic
Numbers: 12345600...

Font: Tableau Boo.. Alignment: Automatic
Numbers: 12345600...

Font: Automatic Alignment: Scientific
Numbers: 12.03%

Font: Automatic Alignment: Percentage
Decimal places: 2

Change it to profit margin..

The screenshot shows a Tableau interface with a sheet titled "Sheet 13 (5)". A tooltip for a profit margin value displays "Profit 12.03%". An "Edit Label" dialog is open, showing the text "Profit Margin" and the formula "<AVG(Profit Margin)>". The dialog includes buttons for Reset, Preview, OK, Cancel, and Apply.

Avg Discount: Duplicate the sheet again. Drag and drop discount inside average(profit)

The screenshot shows a Tableau interface with a sheet titled "Sheet 13 (6)". A tooltip for a profit margin value displays "Profit Margin 1,561". The "Marks" shelf shows "SUM(Discount)" selected. A context menu for "AVG(Discount)" is open, with "Format..." selected. To the right, a "Default" format dialog is open, showing "Font: Tableau Boo..." and "Alignment: Automatic". A "Totals" dialog is also visible, with "Font: Percentage" and "Numbers: 12345600...." selected. The main view shows "Profit Margin 0.1562".

The screenshot shows a Tableau interface with a sheet titled "Sheet 13 (6)". A tooltip for a profit margin value displays "Profit Margin 15.62%". A context menu for "AVG(Discount)" is open, with "Format..." selected. To the right, a "Default" format dialog is open, showing "Font: Tableau Boo..." and "Alignment: Automatic". A "Totals" dialog is also visible, with "Font: Percentage" and "Numbers: 12345600...." selected. The main view shows "Profit Margin 15.62%".

The screenshot shows a Tableau interface with a sheet titled "Sheet 13 (6)". A tooltip for an average discount value displays "Average Discount 15.62%". The "Marks" shelf shows "AVG(Discount)" selected. An "Edit Label" dialog is open, showing the text "Average Discount" and the formula "<AVG(Discount)>". The dialog includes buttons for Reset, Preview, OK, Cancel, and Apply.

Shipping time: I want to know how many days the company is taking to ship the goods :

Do the duplicate of the current sheets.
(Ship data - order date) to get the shipping time. Create a calculated column.

The screenshot shows the Tableau interface with the 'Data' tab selected. A context menu is open over a calculated field named 'Shipdays'. The menu path 'Create Calculated Field...' is highlighted. The calculated field definition is: `[Ship Date]-[Order Date]`. A message at the bottom says 'The calculation is valid.'

Drag and drop the "shipdays" inside avg. Click on measure>average. Click format

The screenshot shows three panels. The left panel shows a calculated field 'SUM(Shipdays)' in the Marks shelf. The middle panel shows a context menu for the AVG(Shipdays) measure, with 'Measure (Average)' selected and 'Average' chosen from the submenu. The right panel shows another context menu for the AVG(Shipdays) measure, with 'Format...' selected.

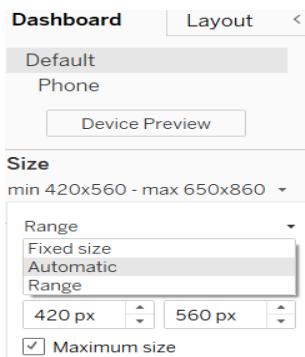
Click decimal > 0 then edit text put average delivery data

The screenshot shows four panels. The top-left panel shows the 'Default' style settings for numbers. The top-right panel shows a sheet titled 'Sheet 13 / 1' with a large text 'Avg Discount' and a value '4'. The bottom-left panel shows the 'Totals' style settings for numbers. The bottom-right panel shows an 'Edit Label' dialog box with the text 'Average Delivery' and the formula '<AVG(Shipdays)> Days'.

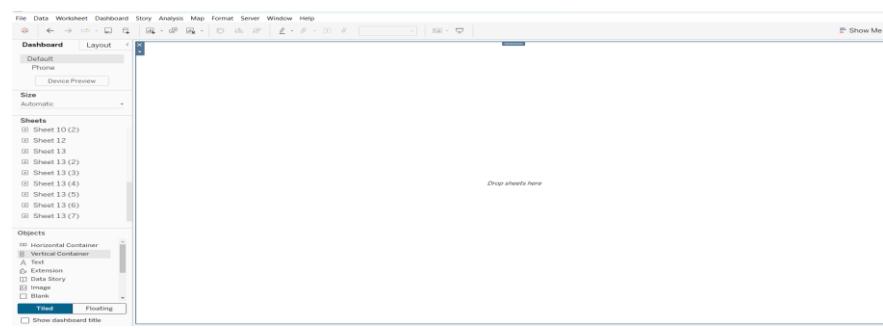
Working with Dashboard : Create a new dashboard

The screenshot shows the Tableau interface with the 'Dashboard' tab selected. A context menu is open over a sheet named 'sheet-01'. The menu path 'New Dashboard' is highlighted. Other options in the menu include 'Device Layouts', 'Show Grid', 'Grid Options...', 'Format', 'Clear', 'Show Title', 'Actions...', 'Auto Update', 'Run Update', and 'Add Phone Layouts to Existing Dashboards'.

Change the size of dashboard: click automatic



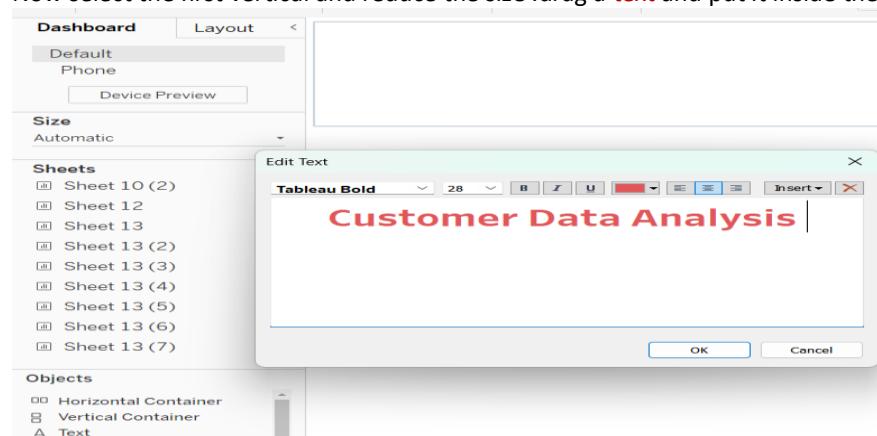
Drag and drop vertical:



Drag and drop another vertical under the 1st one. Then again take another vertical and put under the 2nd one.



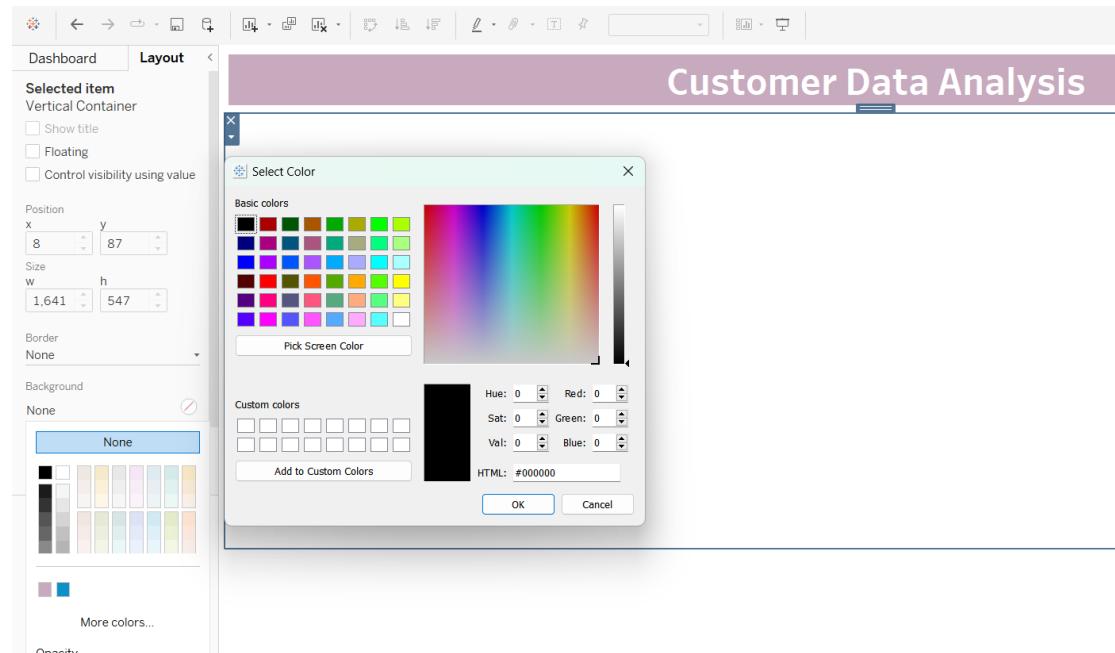
Now select the first vertical and reduce the size .drag a text and put it inside the vertical.



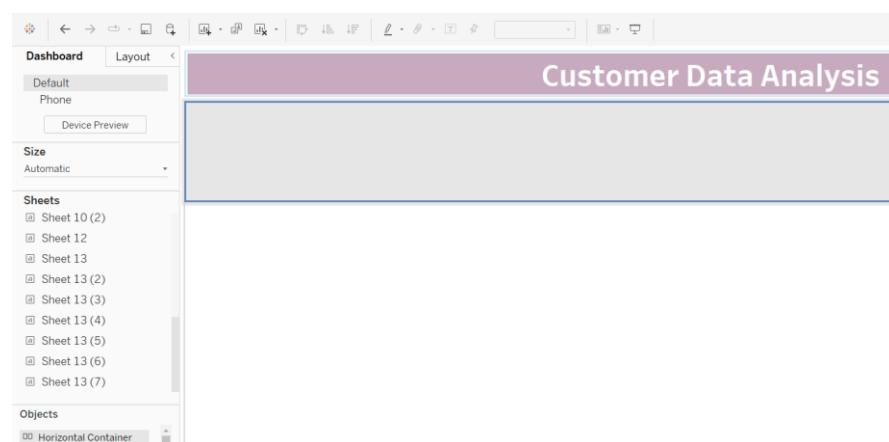
Decrease the area size “Customer Data Analysis”



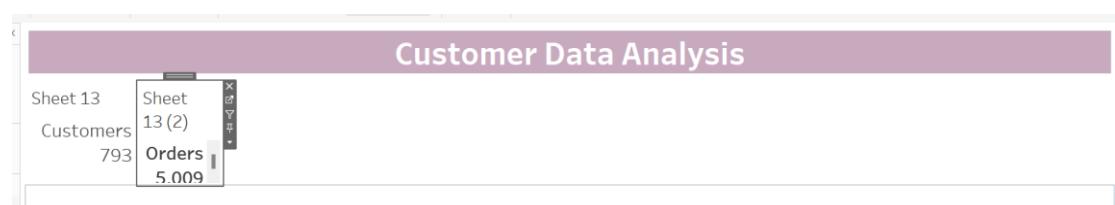
For changing background color > go to layout



Decrease the size. Go to dashboard > drag horizontal and put it inside the 2nd row



Put the “customer” number there. Again drag the horizontal bar and put it right side of the 2nd. And put the “order” there.



Rest also do the same for 2nd .. drag and drop horizontal and select the sheet and drop it.

Customer Data Analysis							
Sheet 13 Customers 793	Sheet 13 (2) Orders 5,009	Sheet 13 (3) SALES \$2.30M	Sheet 13 (4) Profit \$0.29M	Sheet 13 (5) Profit Margin 12.03%	Sheet 13 (6) Average Discount 15.62%	Sheet 13 (7) Average Delivery 4 Days	

Right click > hide title : for hiding sheets



Next: Do it for all ..

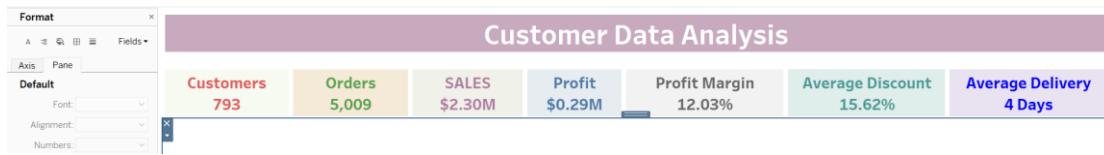
Looks like below:

Customer Data Analysis							
Customers 793	Orders 5,009	SALES \$2.30M	Profit \$0.29M	Profit Margin 12.03%	Average Discount 15.62%	Average Delivery 4 Days	

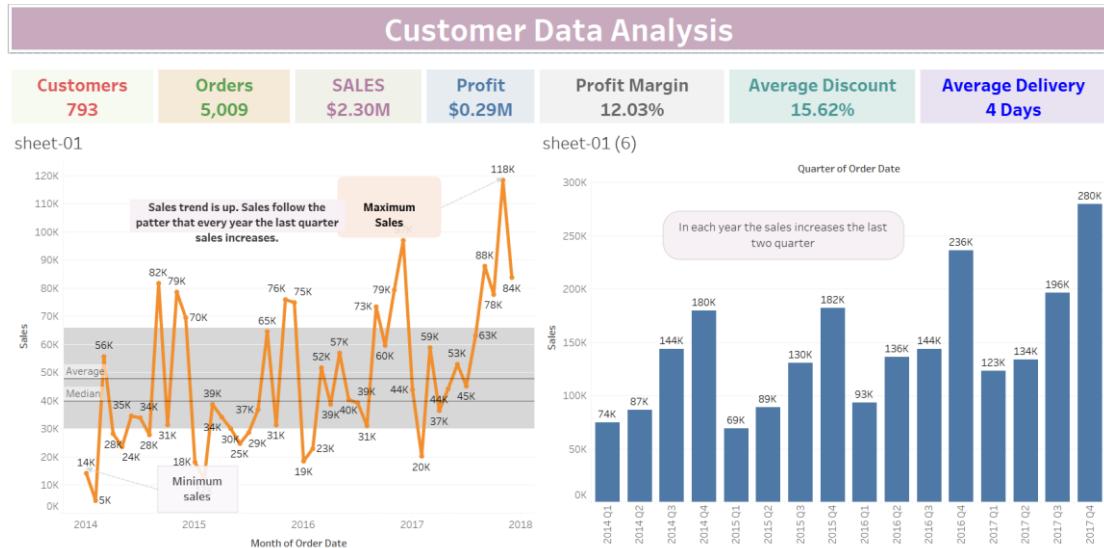
Right click > format then > shading> then edit colors. Click field> customer id > change color

Field - click the icon u get -- select color

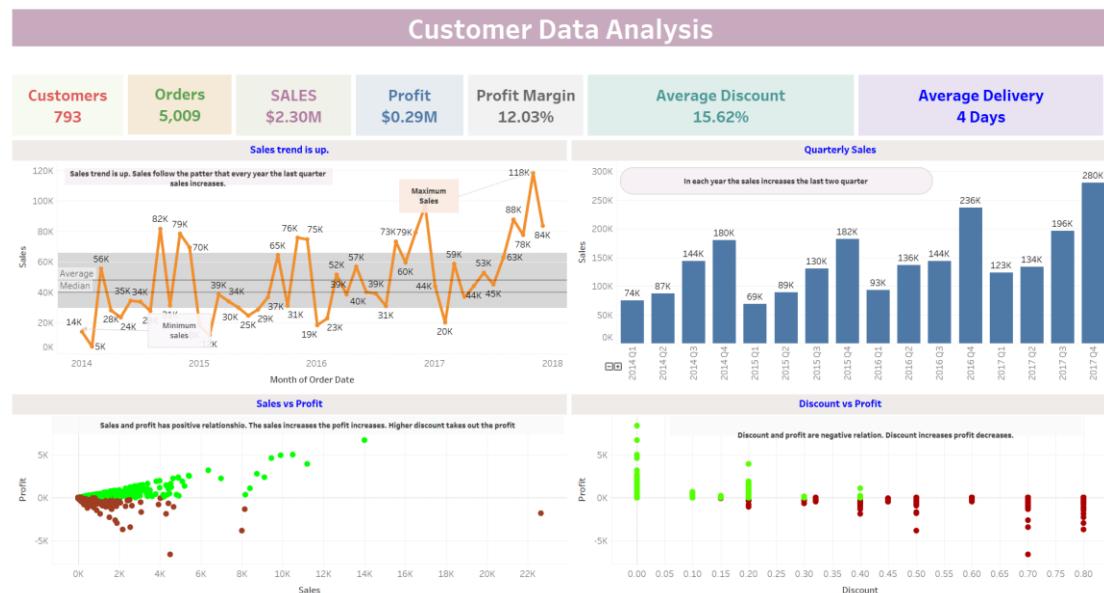
Format ..edit ..color and background.....



Drag and drop “Horizontal” and drag and drop image from left ..again drag and drop “ horizontal” and bring the image from left doing drag and drop. Put it beside the first image then adjust both images



Full dashboard looks like this after customize , formatting, adjustment text by re sizing , adding color to the title background, right clicking :

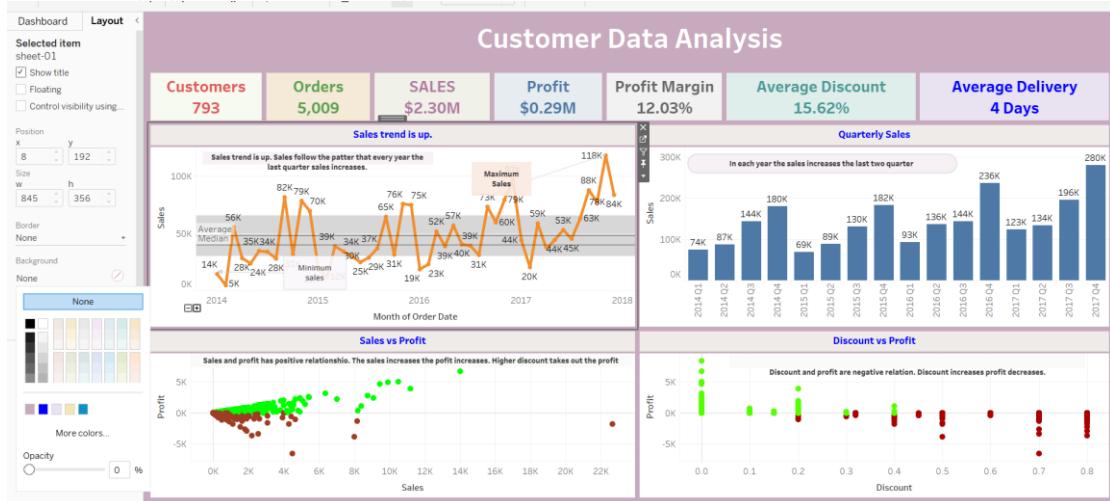


Now go to > format > dashboard > Change the default color.



>> For changing the line color of the heading > click on that > go left layout > select border > select line color (if you want "Customer Data Analysis" that area.)

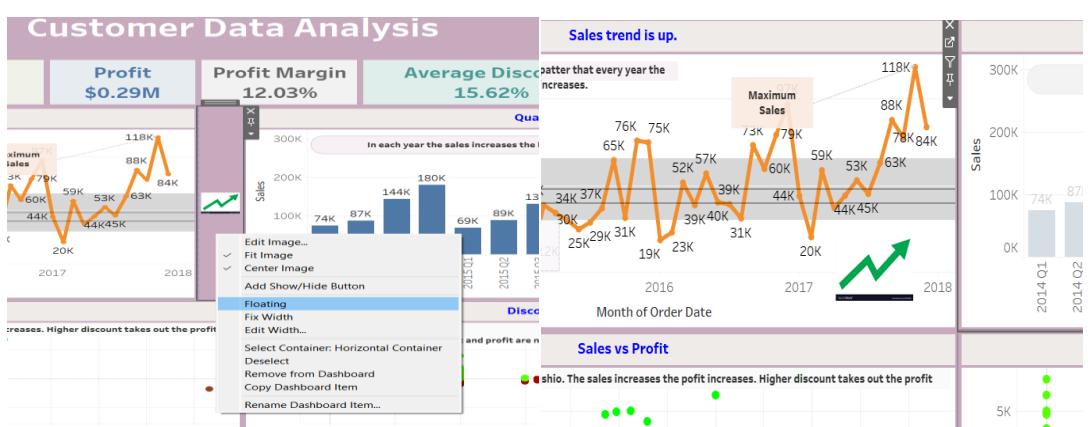
>> For changing the worksheet background color > click on format



>> We can bring external images as well .Click dashboard> image(bottom)

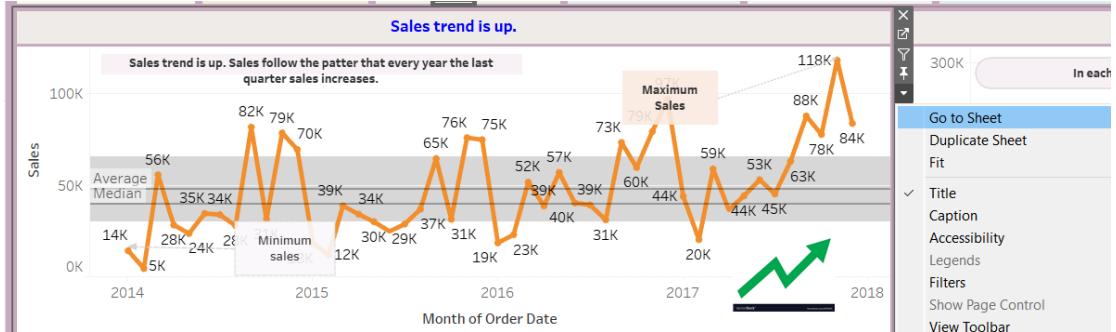
>> Select the area before u bring any image. Go Google look for image and save it.

>> bring the image and click > floating (for moving it) Change the size and place it



>> If we want to show year by year

>> Go to sheet >



>> Drag the order date to filter ..

The screenshot shows the Tableau interface with the 'Filters' dialog box open. The 'Filter Field [Order Date]' dropdown is set to 'MONTH(Order Date)'. The 'Range of Dates' section is expanded, showing options for Years, Quarters, Months, Days, Week numbers, Weekdays, Month / Year, Month / Day / Year, and Individual Dates. The 'SUM(Sales)' mark is selected. The background shows a line chart of sales over time.

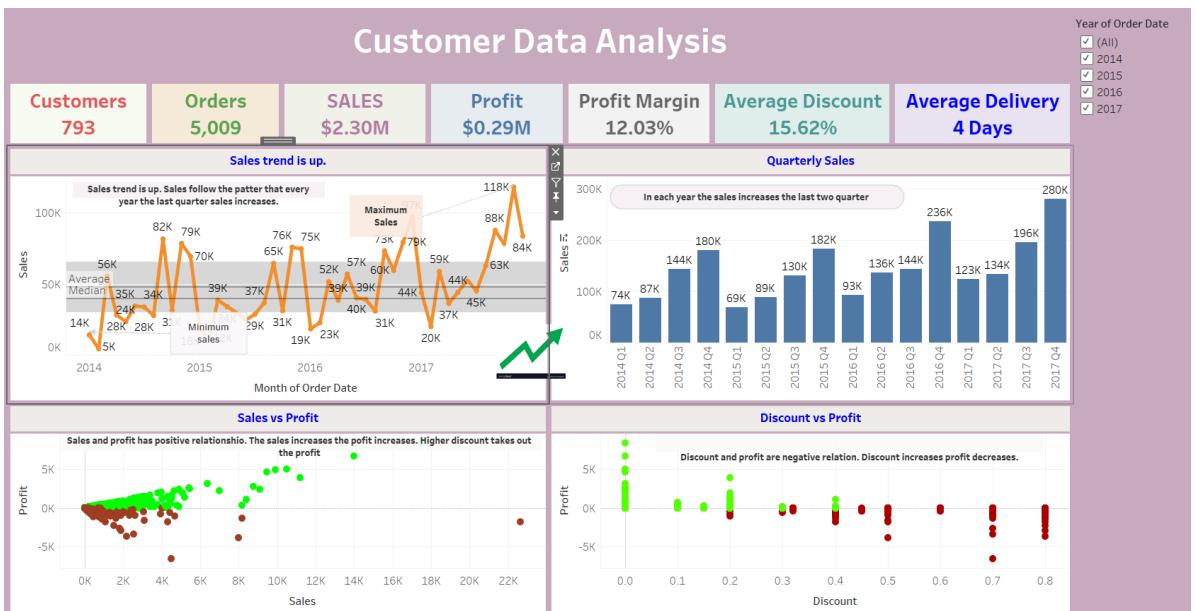
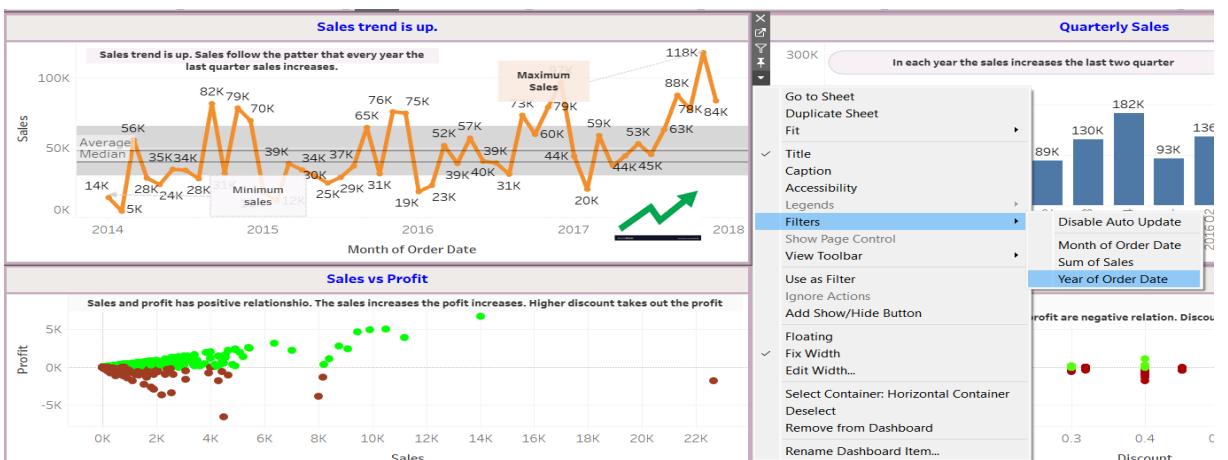
>> From the filter we select year > next >

The screenshot shows the Tableau interface with the 'Filter [Year of Order Date]' dialog box open. The 'Select from list' radio button is selected, and the years 2014, 2015, 2016, and 2017 are checked. The 'OK' button is highlighted. The background shows a line chart of sales over time.

Right click on filter > show filter

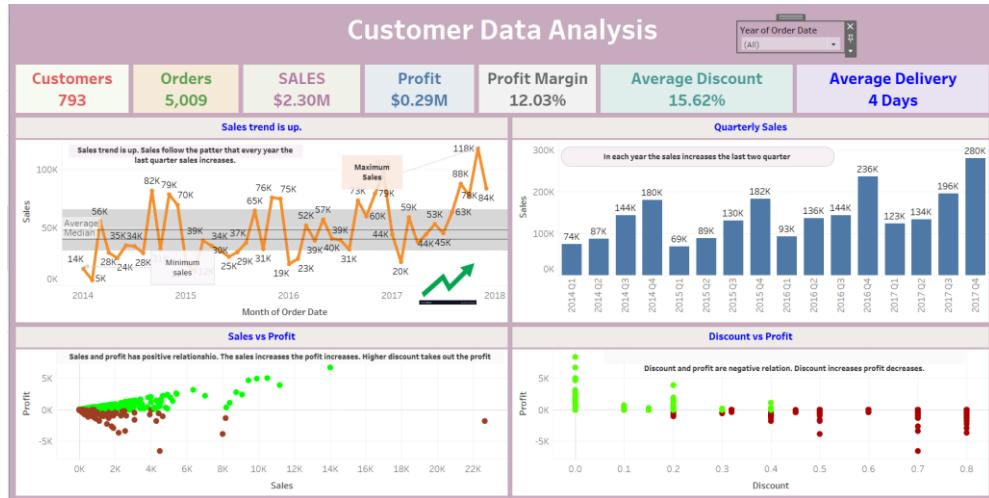


Now lets go back to dashboard. We need to bring this to the dash board . filter > year of order date

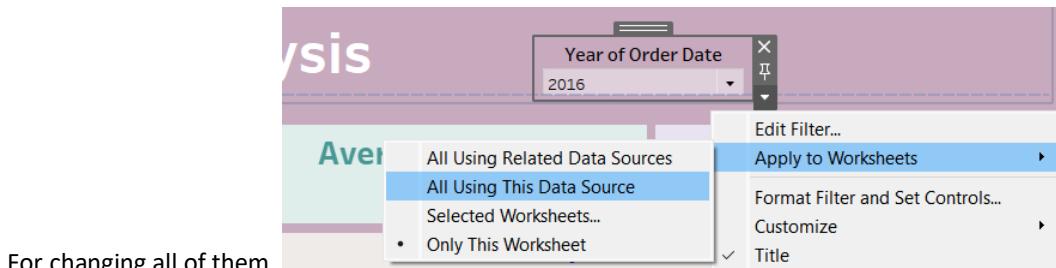
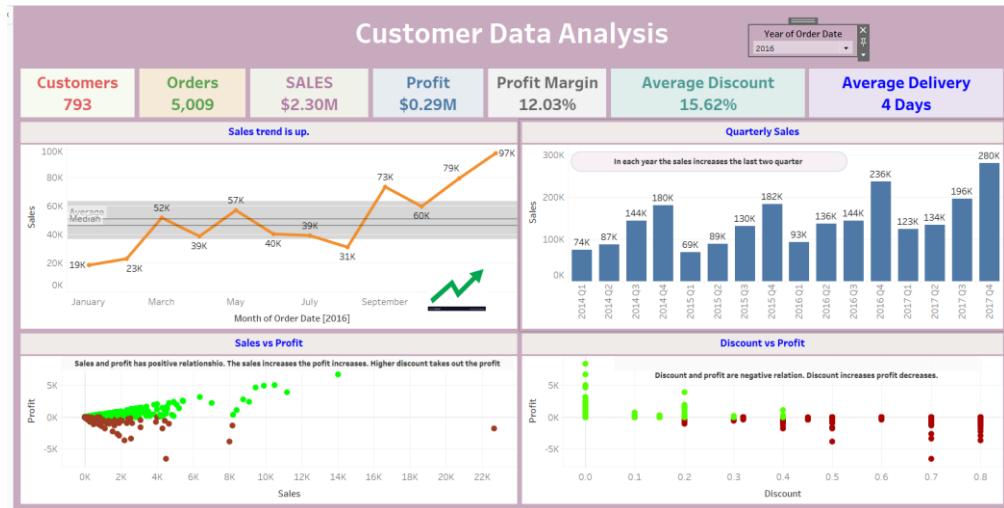


Select there and > right click > single value dropdown ..

Do it floating : re rocating the dropdown bar

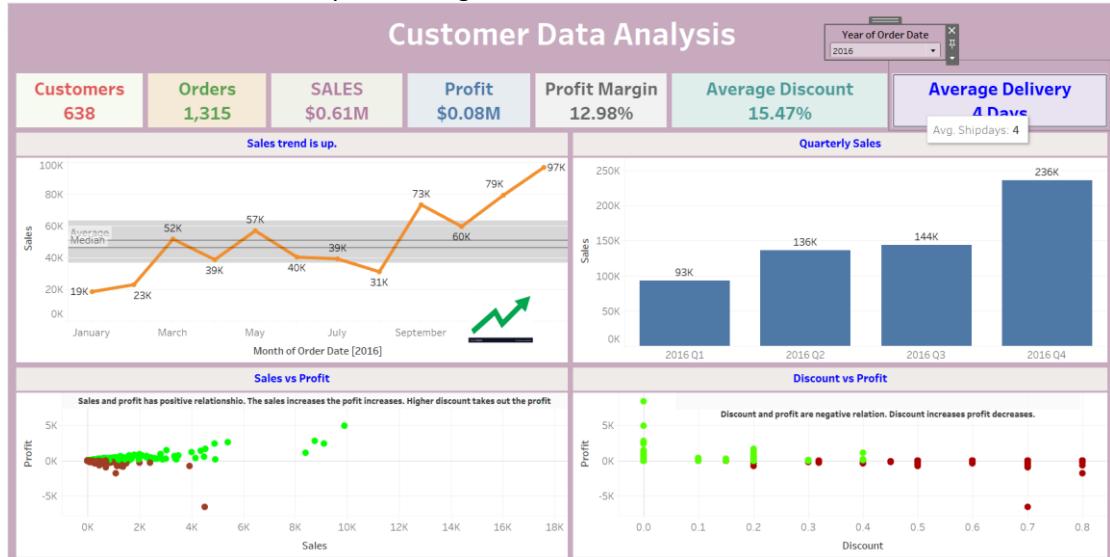


It will only changing the first one when we select years



For changing all of them..

Now all the sheet if we select year it changes the data



Joining >>>>>..... for the public version

>> open tableau > import file > drag the table then from drop down of the table > click open

The screenshot shows the Tableau Data Source interface. On the left, under 'Connections', there is one connection named 'P1-AmazingMartEU2'. Under 'Sheets', three sheets are listed: 'ListOfOrders', 'OrderBreakdown', and 'SalesTargets'. A 'New Union' and 'New Table Extension' option are also available. In the center, a context menu is open over the 'ListOfOrders' sheet, with 'Open...' highlighted. Below the menu, a preview of the 'ListOfOrders' table is shown with 10 fields and 4117 rows. A small preview window on the right shows two rows of data: BN-2011-7407039, 1/1/2011 and AZ-2011-9050313, 1/3/2011.

Then drag and drop the other table ..it will do the inner join.

The screenshot shows the Tableau Data Source interface with a joined dataset named 'ListOfOrders+ (P1-AmazingMartEU2) (2)'. It indicates that 'ListOfOrders' is made of 2 tables: 'ListOfOrders' and 'OrderBreakdown'. A diagram shows a line connecting the two tables.

>> Go to sheet 1 ..We see two orderID . Hide one.

The screenshot shows the Tableau Data Source interface with the 'ListOfOrders+' dataset selected. In the 'Tables' pane, the 'OrderBreakdown' table is expanded, showing fields like 'Category', 'Order ID (OrderBreakdown)', 'Product Name', 'Sub-Category', 'Country, State, City', and 'Country'. The 'Order ID (OrderBreakdown)' field is currently selected. A context menu is open over this field, with 'Hide' highlighted.

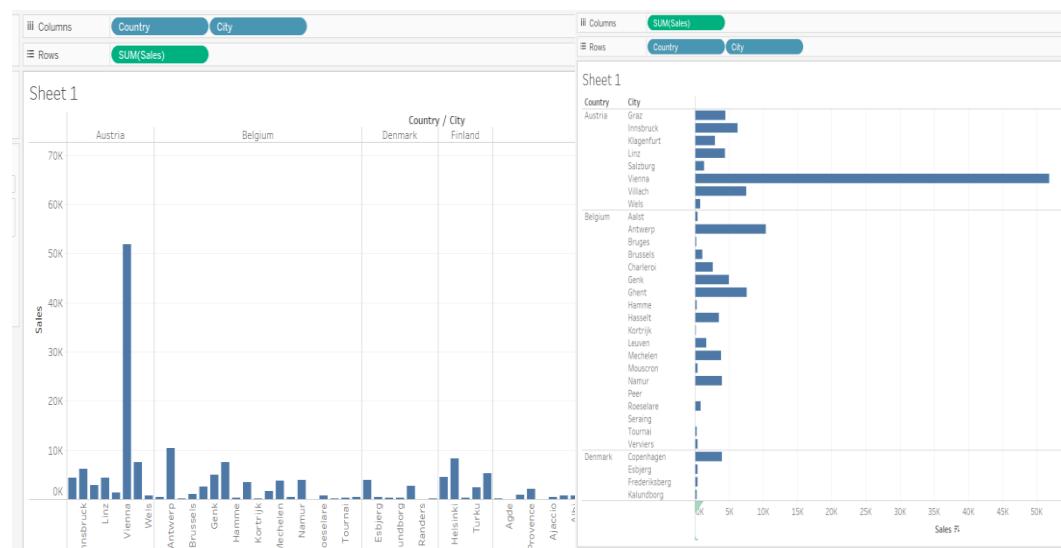
This dataset automatically created hierarchy. So, we will remove it .

The screenshot shows the Tableau Data Source interface with the 'Country, State, City' field selected. A context menu is open over this field, with 'Remove Hierarchy' highlighted.

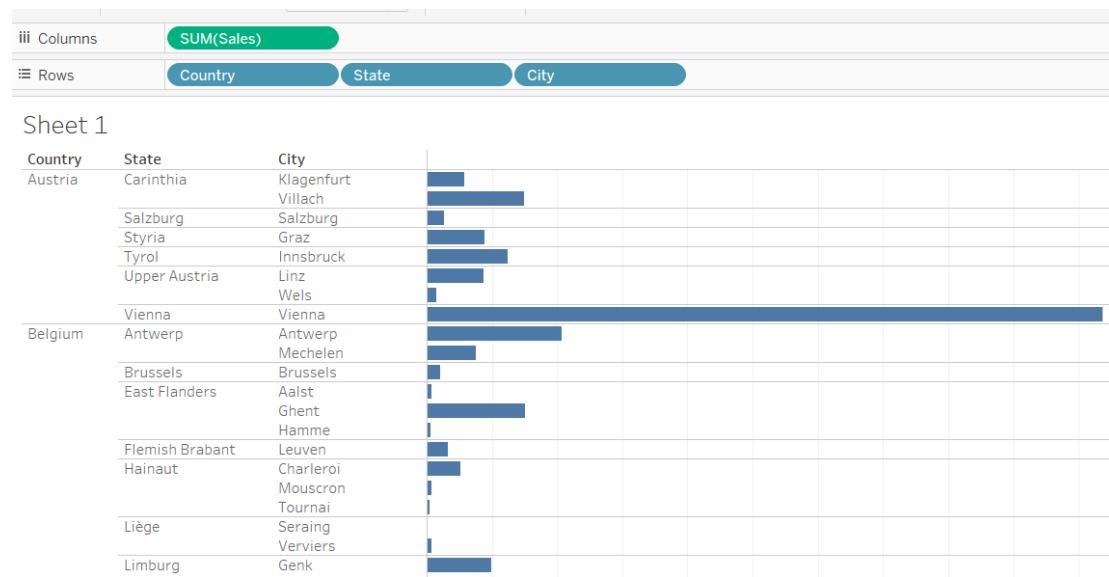
>>> Take **country** and **sales** to the column and rows .(Drag and Drop)

Now I want to see the **city** wise result

>> Drag the city after the country to see . Swap it to look better.



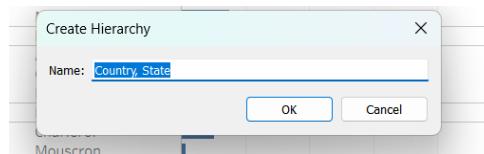
>> IF I want to see the state wise. Drag and drop "State" put it between the country and city.



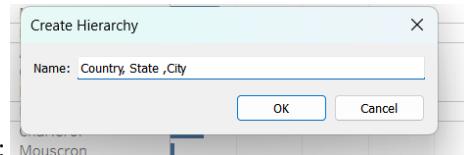
If we create a hierarchy then we can go from one label to any other label .

>>> How to create a hierarchy key

First is country .. > under country it is state > under state it is city



>> take state and put it inside country.....



Add city then :

>> Drag the city from the left sidebar and put it below : state

The screenshot shows the Tableau Data Source interface. In the 'Tables' pane, there are three main sections: 'ListOfOrders', 'OrderBreakdown', and 'Country, State, City'. Under 'Country, State, City', the 'City' field is selected and highlighted with a blue background.

In the center, the 'OrderBreakdown' table is expanded, showing fields like Customer Name, Order Date, Order ID, Region, Segment, Ship Date, and Ship Mode. Below the table, the 'Measures' pane shows 'SUM(Sales)'.

On the right, the 'Columns' and 'Rows' sections are visible. The 'Columns' section has 'SUM(Sales)' selected. The 'Rows' section has 'Country' selected. A dropdown menu next to 'Country' shows options: 'Country', 'State', and 'City', with 'City' also highlighted in blue.

Now we go to country it shows a + sign:

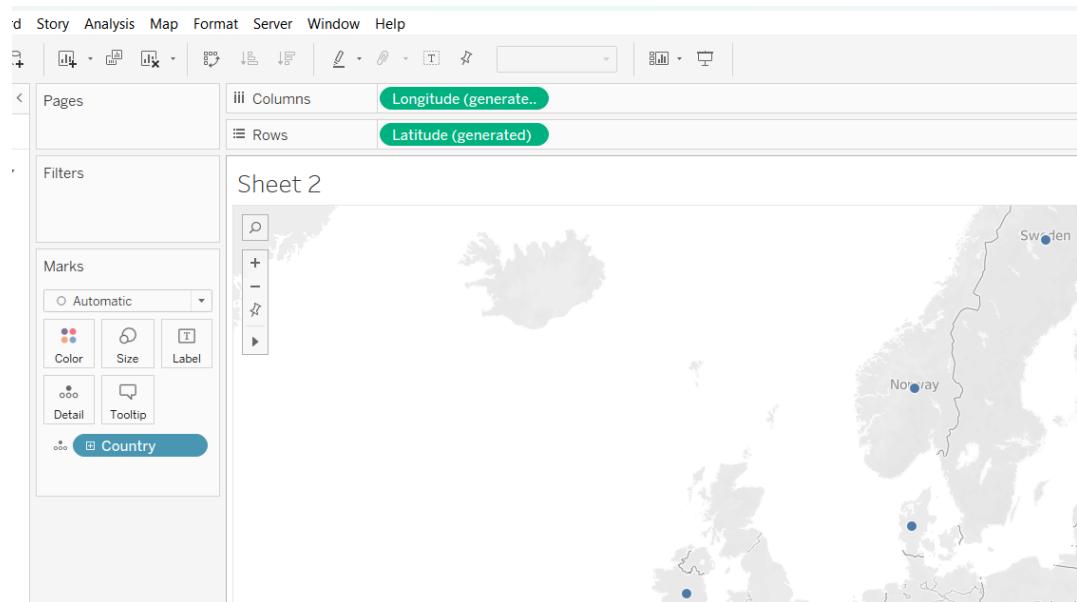
Sheet 1

Country

>> click + sign to see state > click state to see city

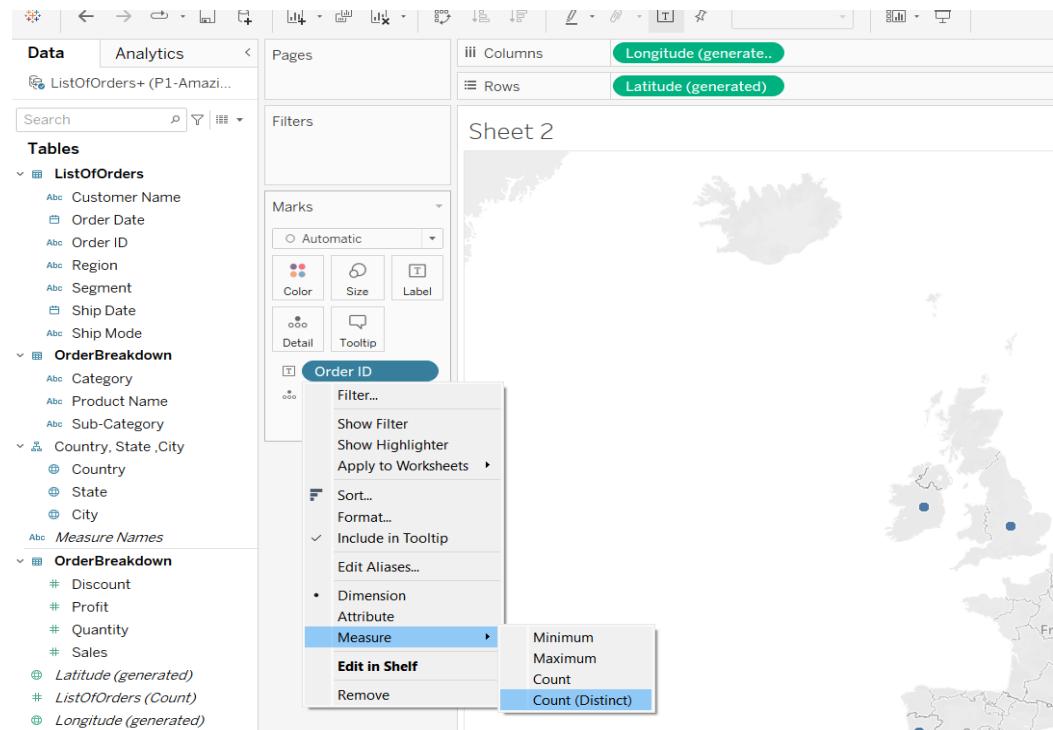
>>> Now visualization

> create a new sheet
> Drag the country to the middle

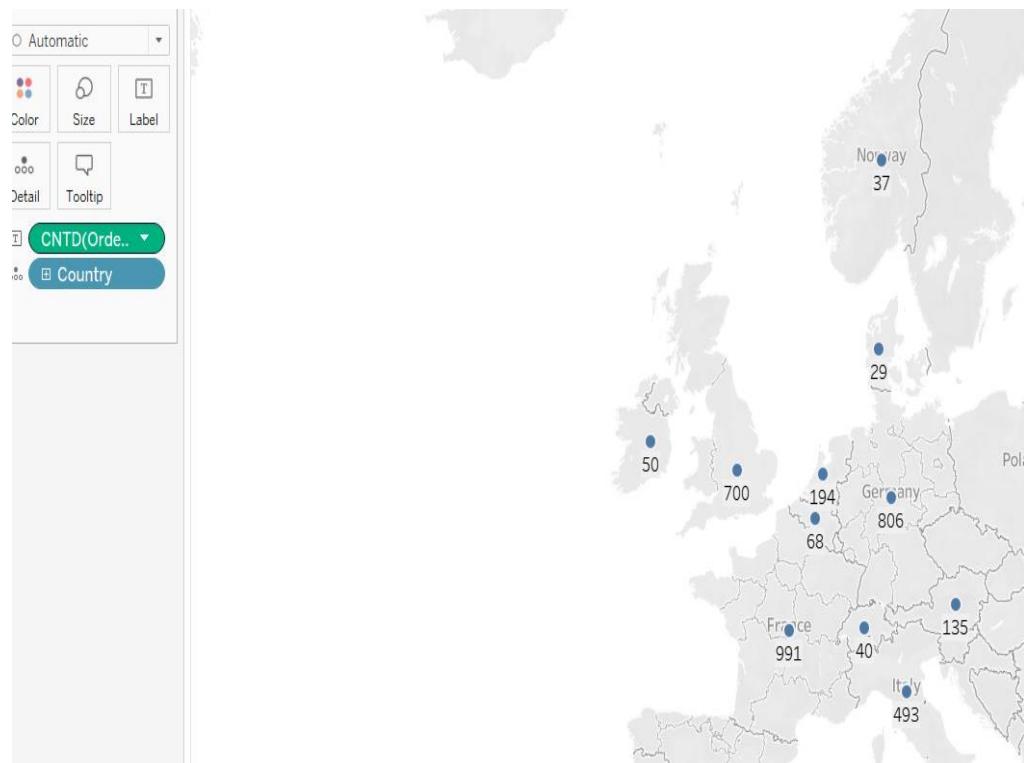


>>> Now we want to see how many order we get from any particular country.

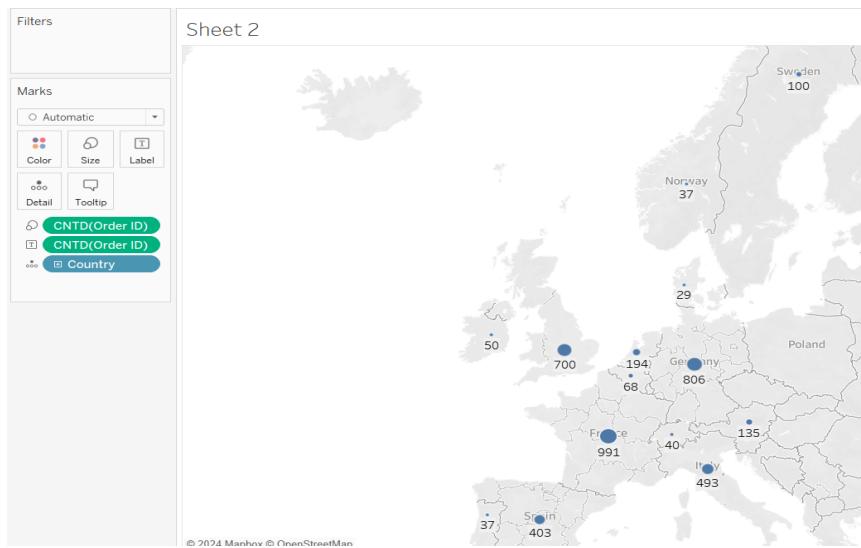
>> put order id into label. Order id > measure > count (distinct)



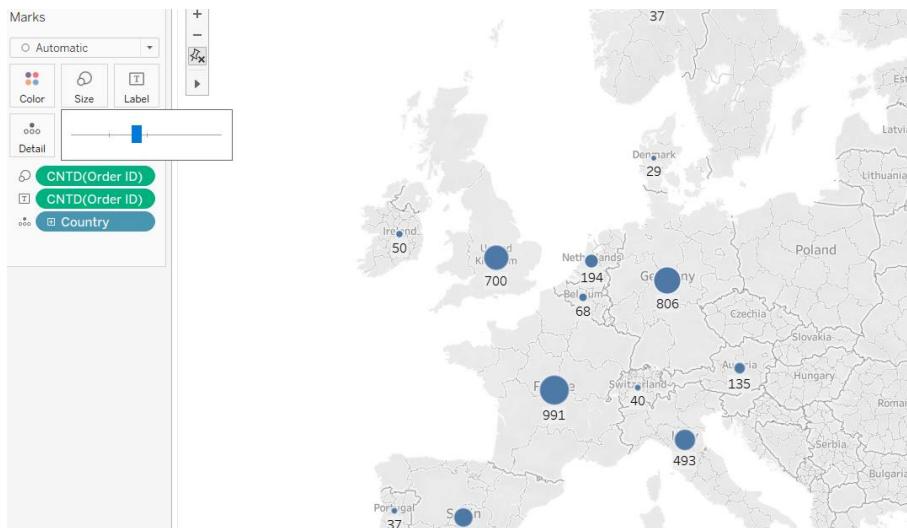
It show the number



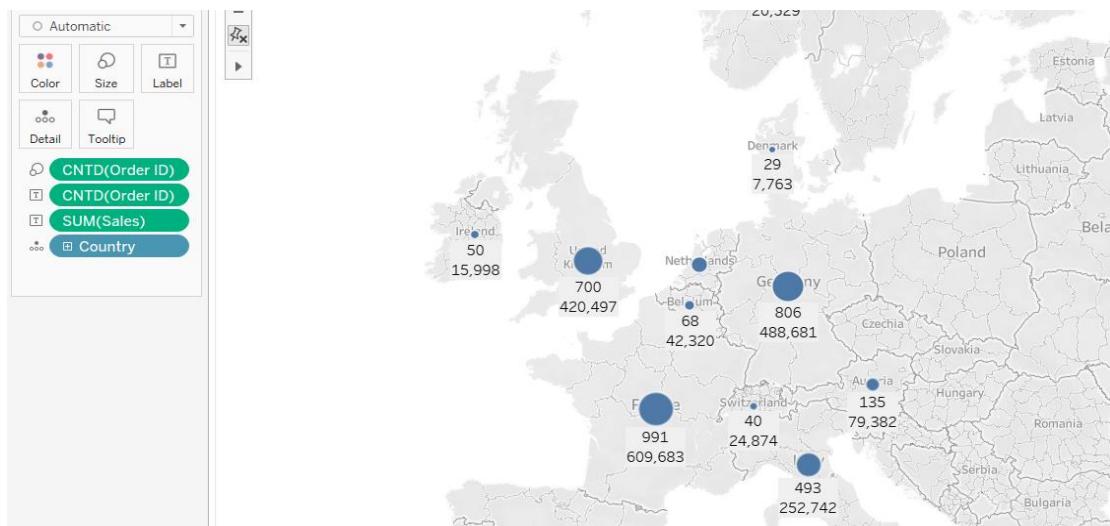
>> From which country we got the maximum orderPress keyboard control and drag to to the size .



>>> I want to increase the size : go size ..



>>> If I want to see the sales also. Drag the sales into label .



>>> If I want to change the format . Go to sales..drop down > format

Format SUM(Sales)

Default
Font: Tableau Boo... Alignment: Automatic Numbers: 123,456

Totals
Font: Tableau Med.. Alignment: Automatic Numbers: 123,456

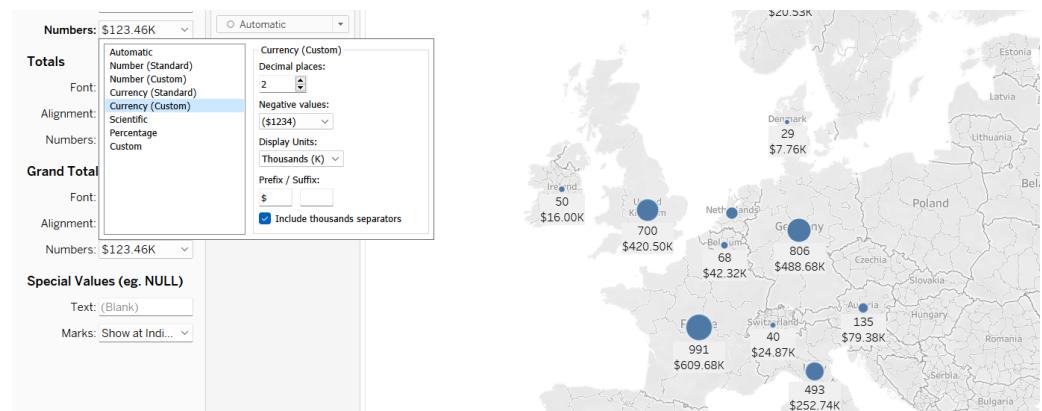
Grand Totals
Font: Tableau Med.. Alignment: Automatic Numbers: 123,456

Special Values (e.g. NULL)
Text: (Blank) Marks: Show at Indi...

Marks: CNTD(Order ID), CNTD(Order ID), SUM(Sales)

Context menu (open over SUM(Sales)):
Format... (highlighted)
Show Filter
Apply to Worksheets
Format...
Include in Tooltip
Dimension
Attribute
Measure (Sum)

Next >>



>> If I want to change the color or font size > click on label >

Edit Label

Text: <CNTD(Order ID)>
<SUM(Sales)>

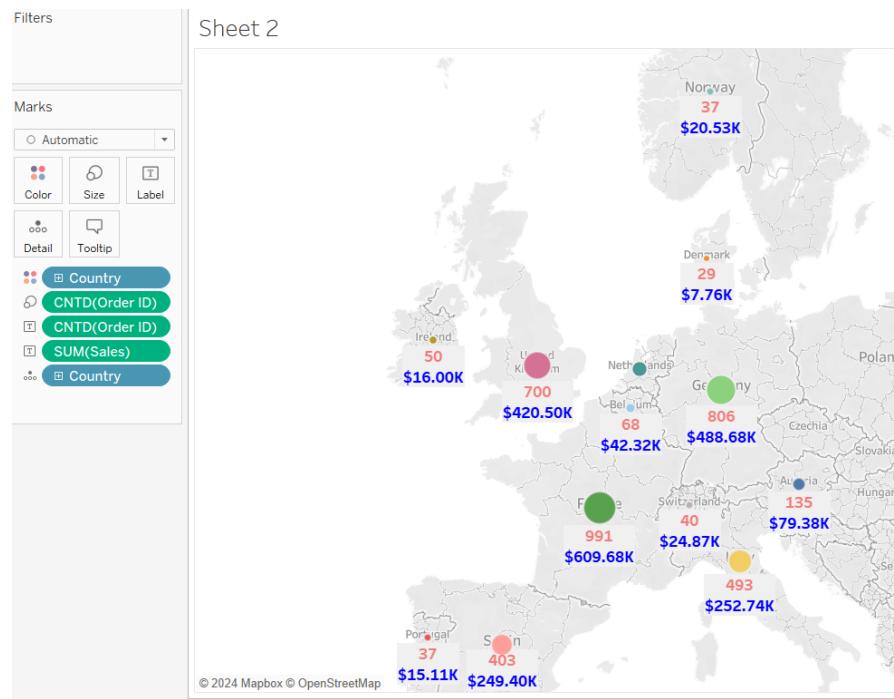
Font: Tableau Bold, 10pt, B, I, U

Alignment: Automatic

Preview: Shows the map with red labels for Order ID and blue labels for Sales.

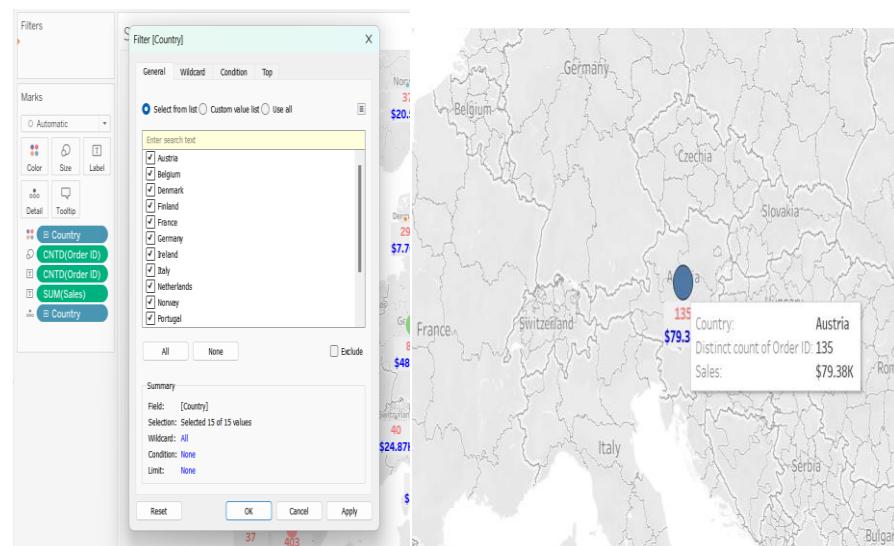
>>> If I want each and every color to be changed for each country

> Drag the country to the colors



>>> I want to see only one country.

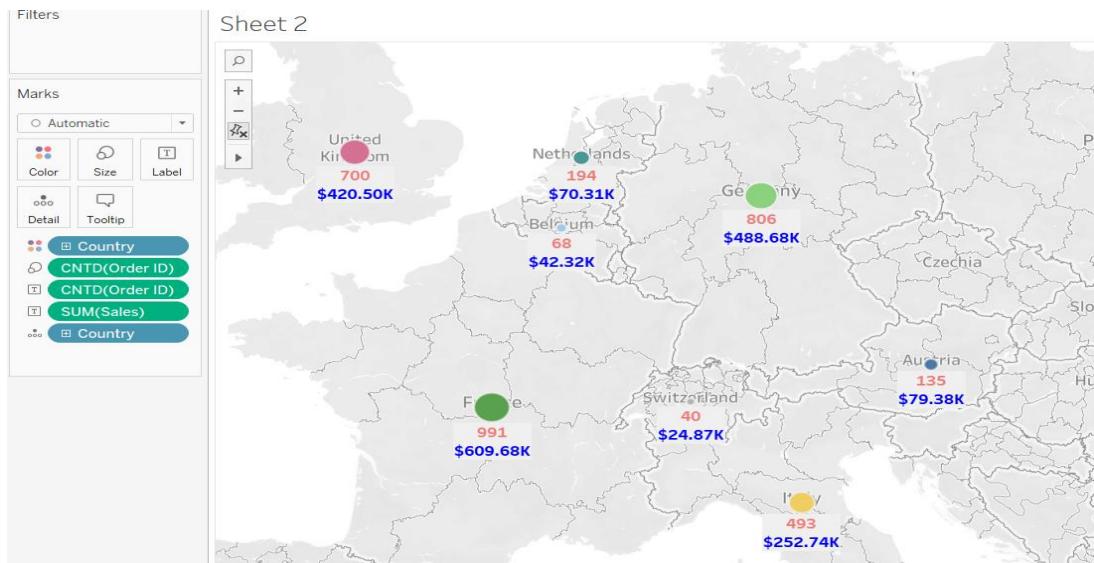
> Drag the country to the filter. Select : None then > select > one country



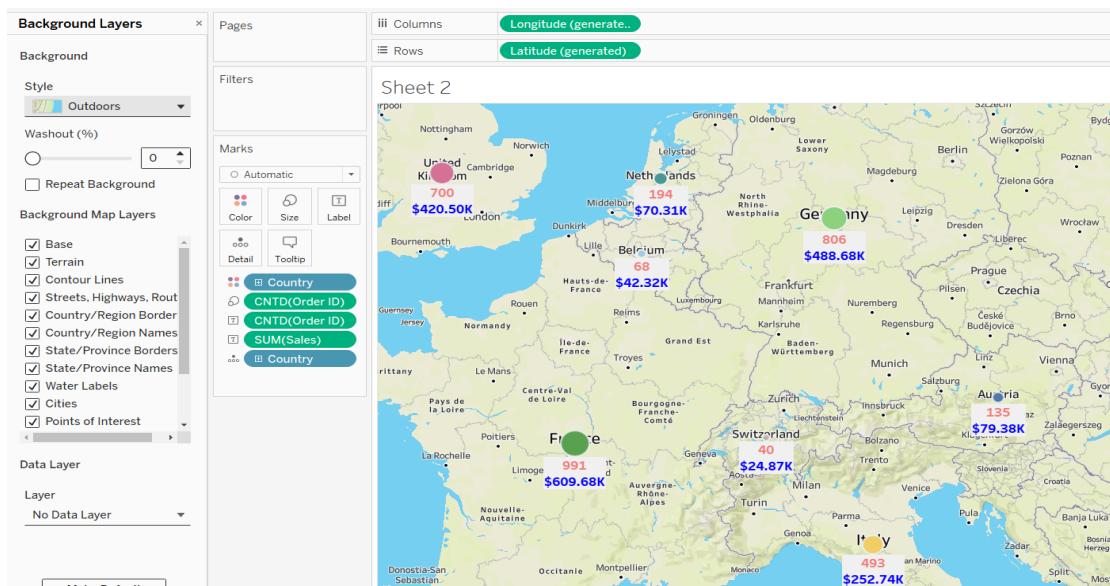
Click + sign to see the state and city



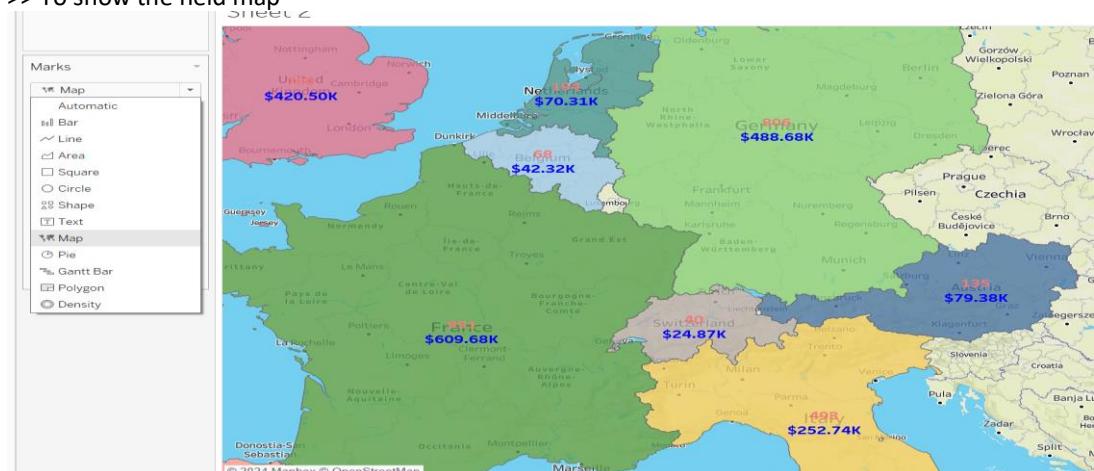
>> Remove the filter .. press - sign to country ..to go back



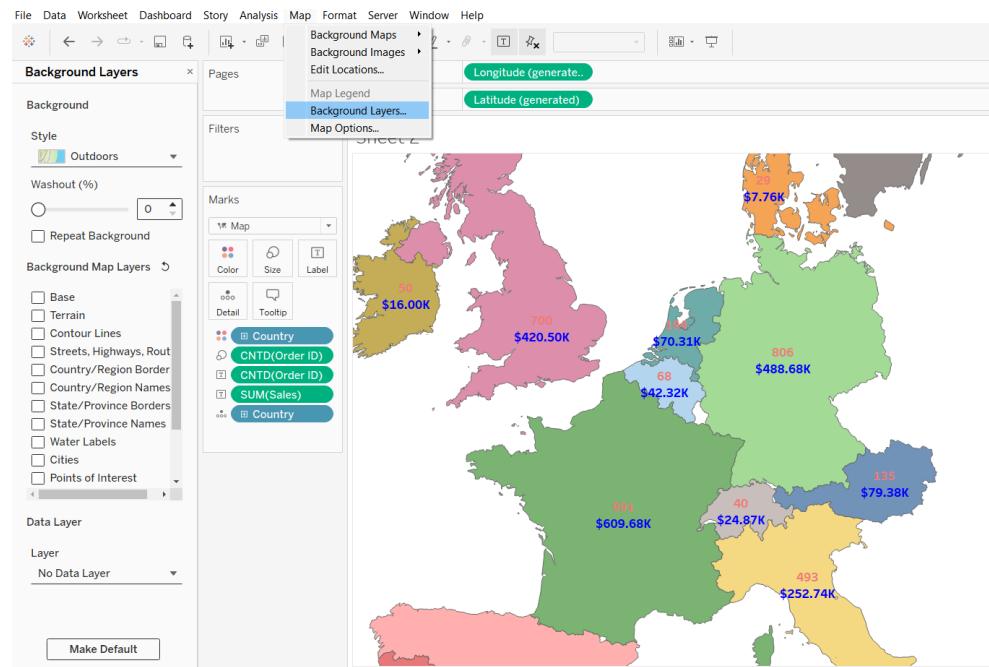
>> Go to map at menu > map background layer > change it if u want.



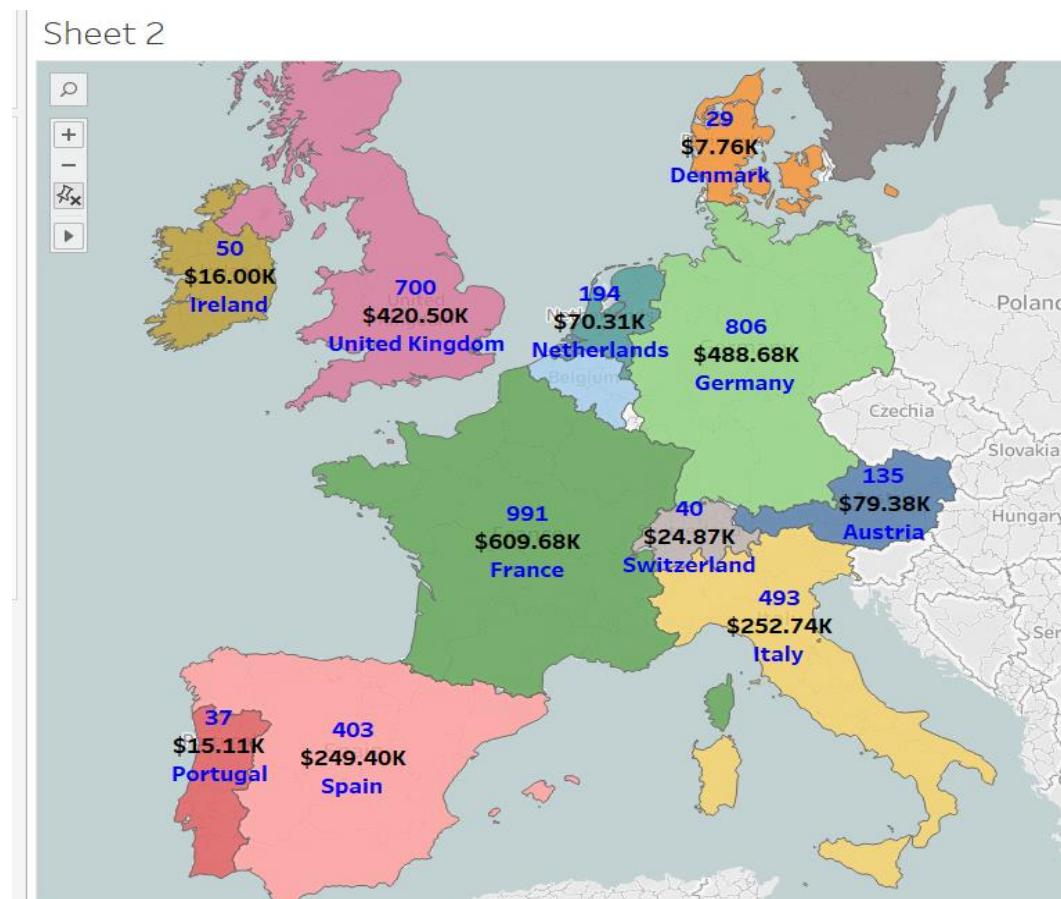
>> To show the field map



>> We don't need other map where there is no customer. So we want to clean it up.
 Go top menu > map > background layer > remove all the check boxes



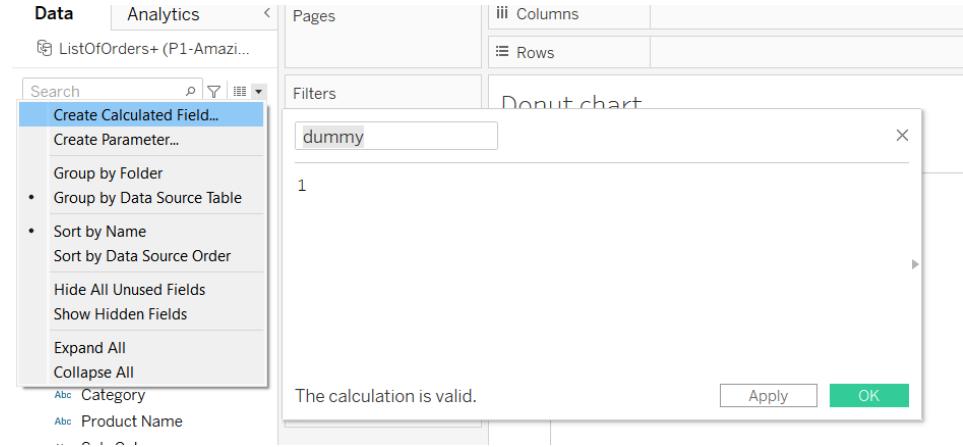
>> To see the country name has become difficult so we will drag the country and put it to the label



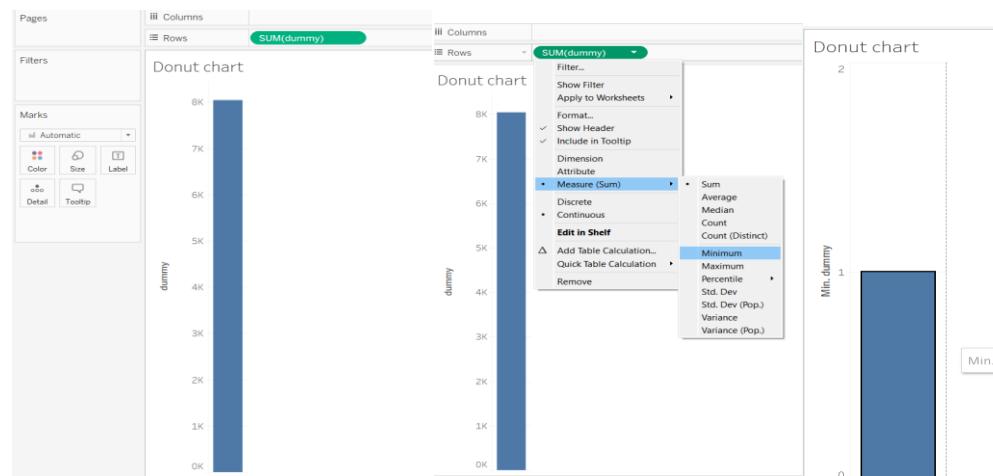
>> We will do dual axis. Merge two charts

>> We will create a donut chart..

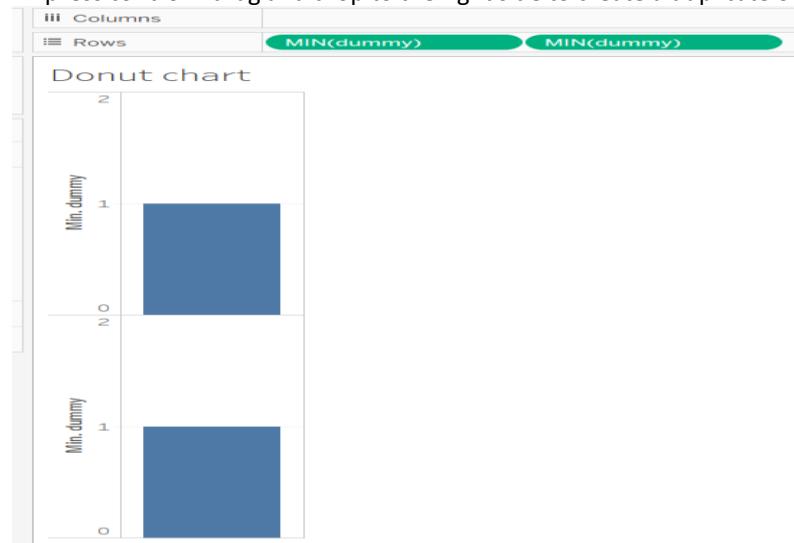
>> Create a new sheet. > we need to a calculated field >



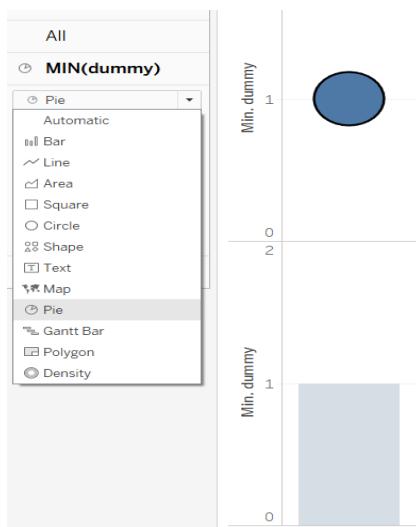
>> drag it to the rows.. >> change it to measure > minimum >> Increase the width of it



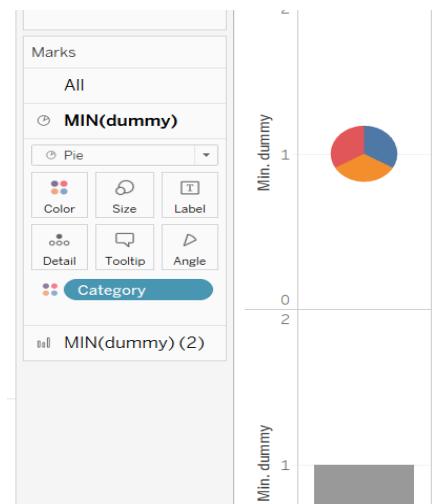
>> press control + drag and drop to the right side to create a duplicate of dummy



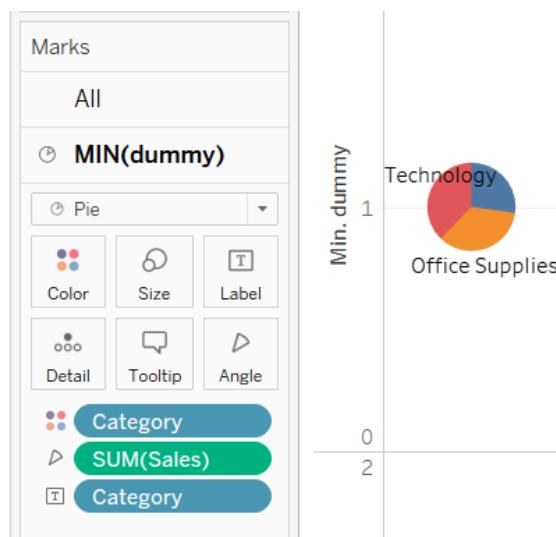
>> Now select the 1st the first dummy and convert it into pie



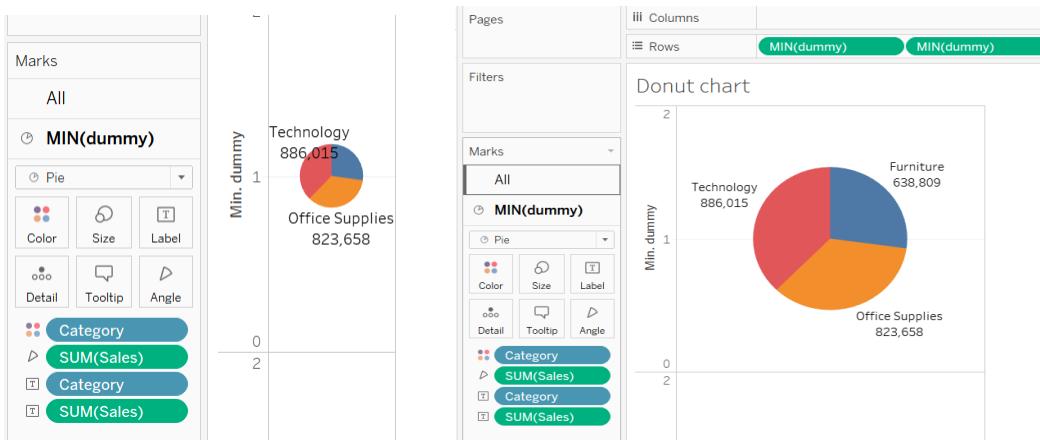
>> Drag category put it into the colors



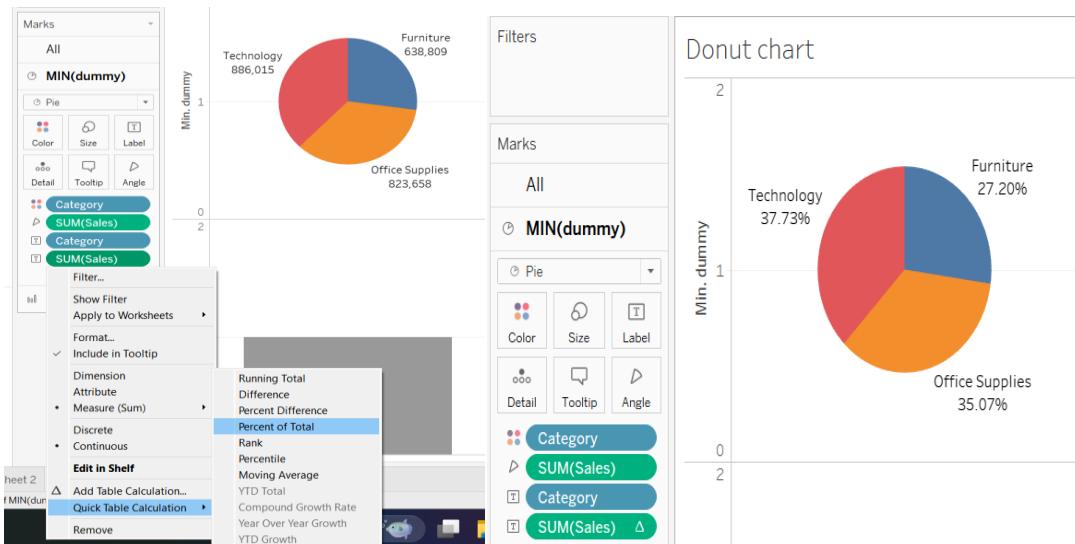
>> Drag sales and drop it to angles >> Drag the category into the label



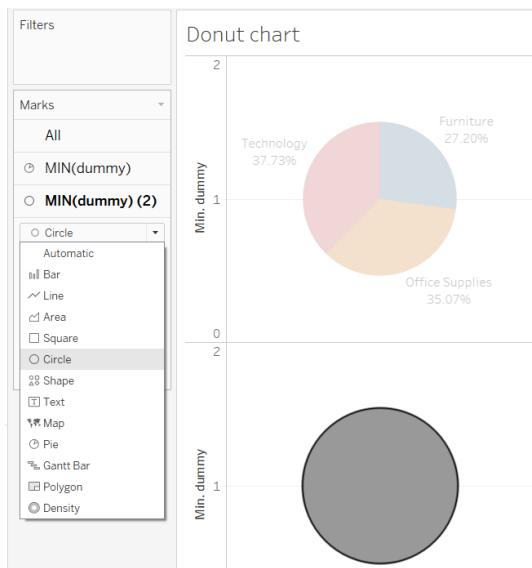
>> Drag sales into the label



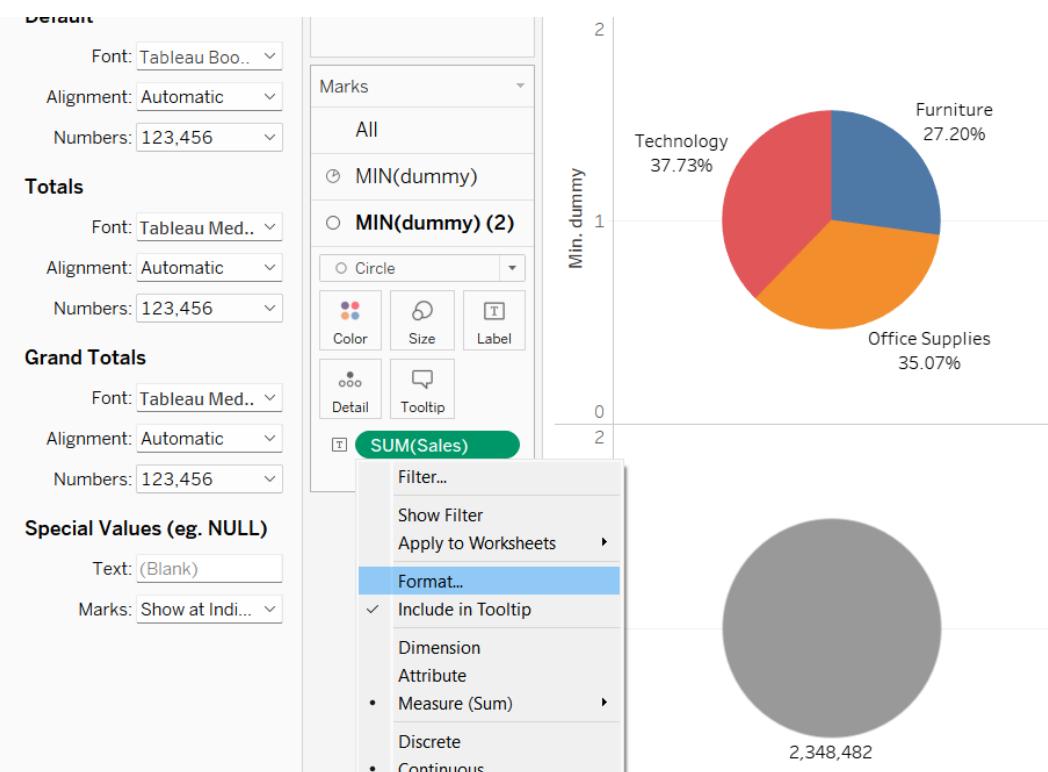
Usually in pie chart we want to see the percentage. Go sum > quick table calculation > percent of total



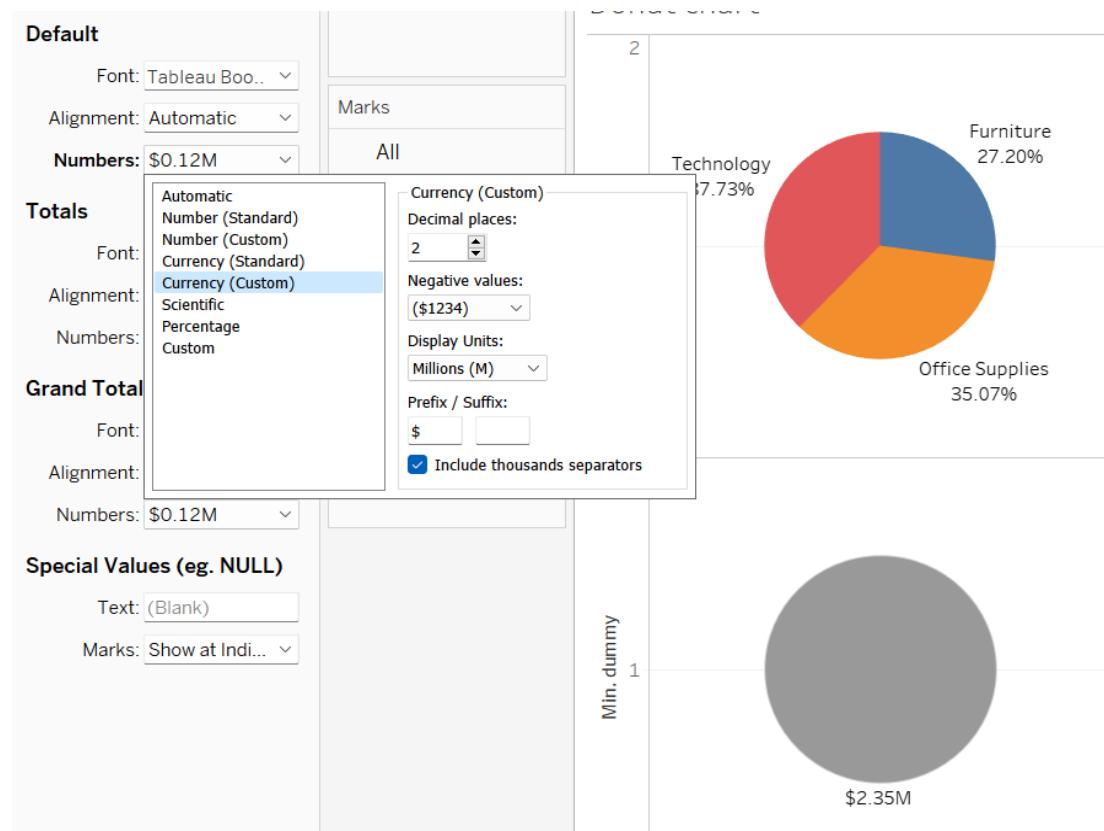
>> Now we will select the 2nd one and change it to circle.



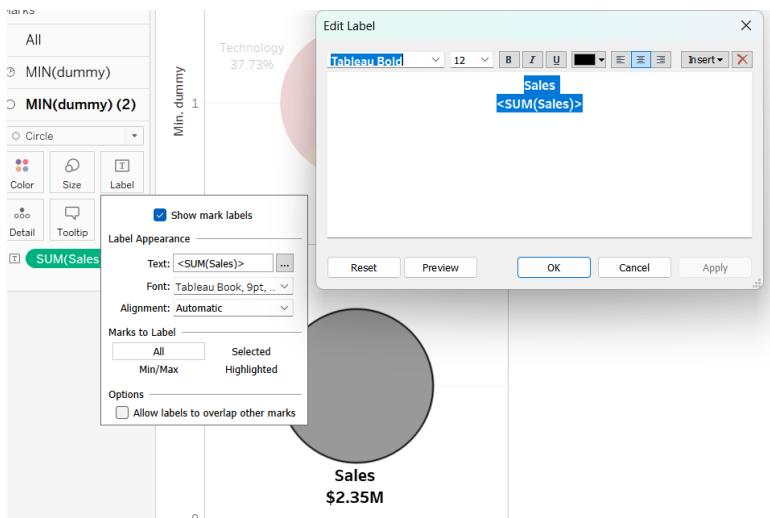
>> Drag the sales into the label. Then change the format....



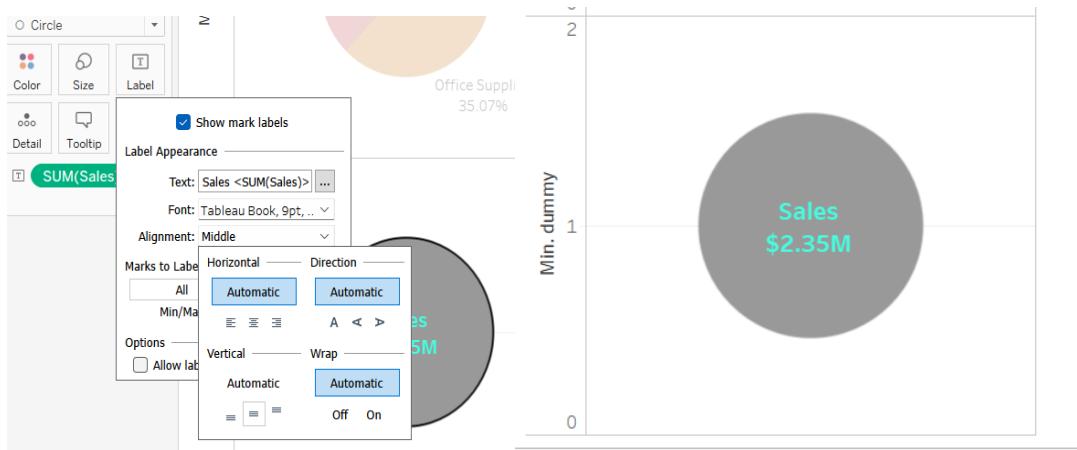
>> next



>> I want the value inside the middle of circle.

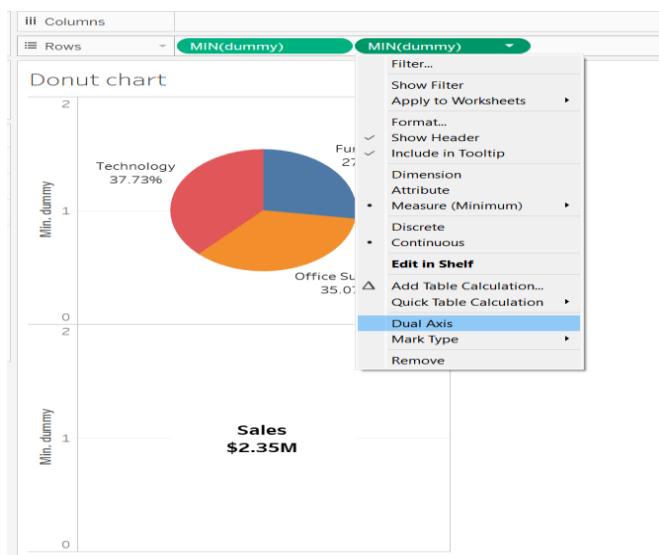


>> next



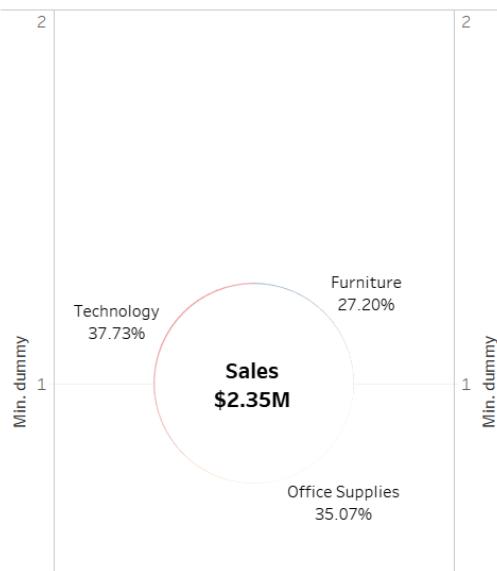
>> Now change the background color to : white

>> Click on dual axis

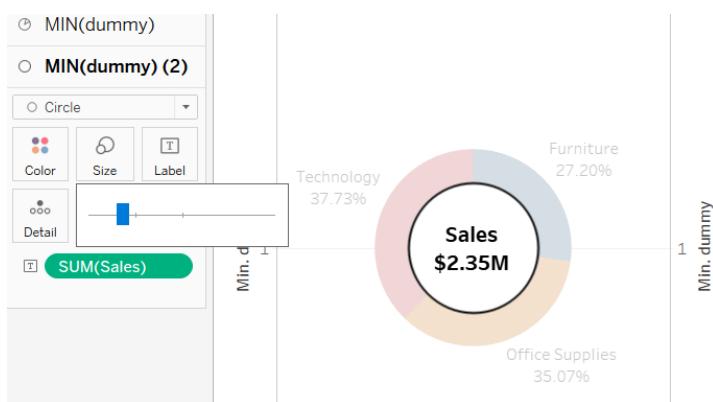


iii Columns	
Rows	MIN(dummy) MIN(dummy)

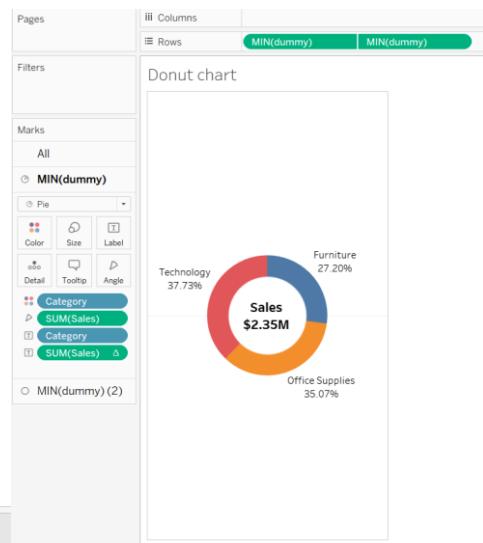
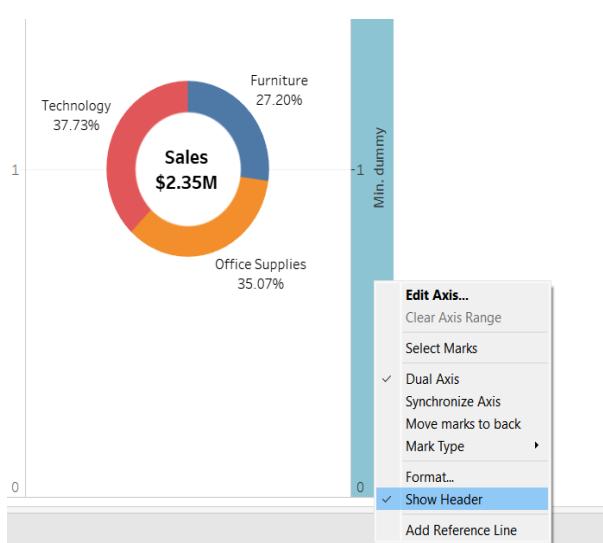
Donut chart



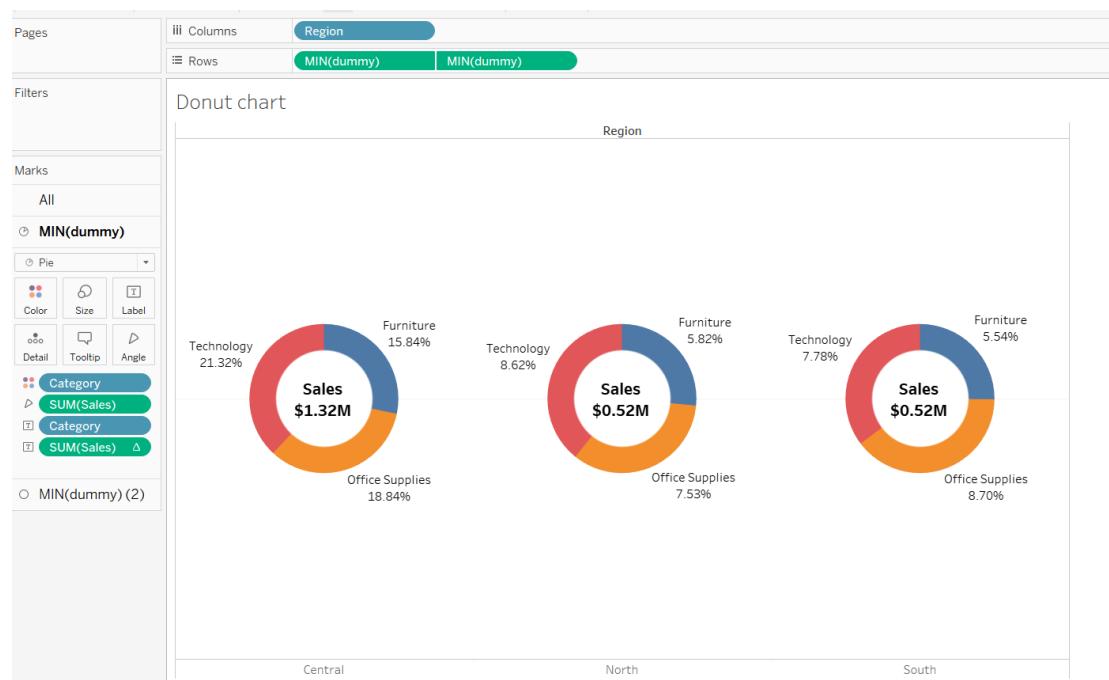
>> Go to size and decrease



>> deselect > Show Header to remove dummy

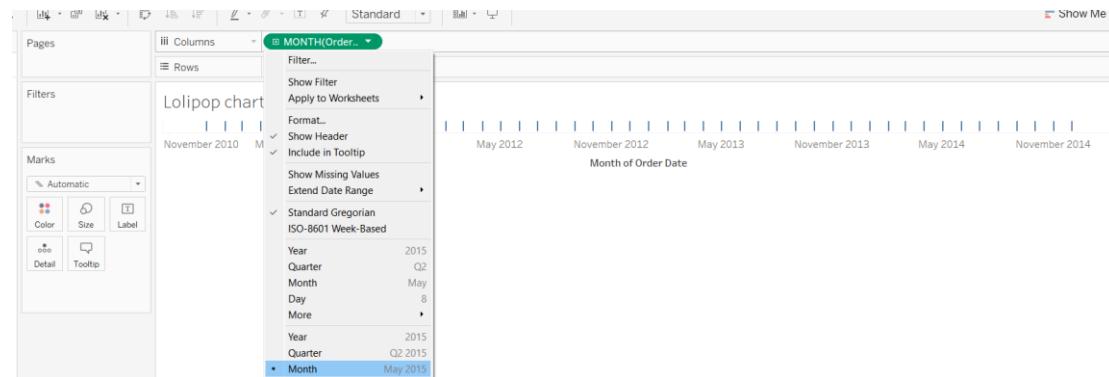


>>> Take "Region" drag and drop it to column

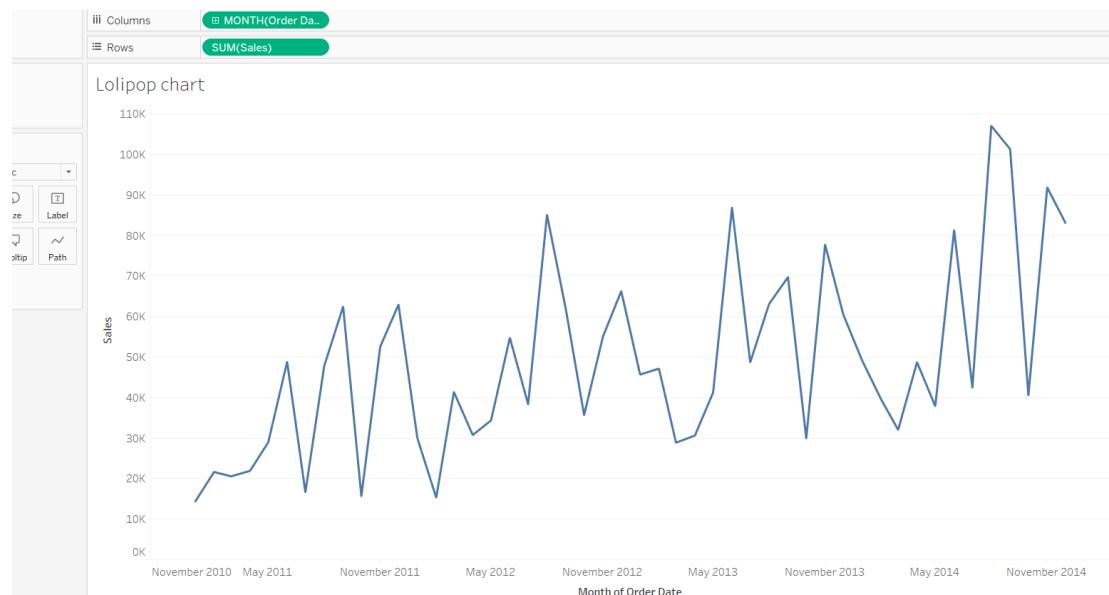


>> Lollipop Chart:

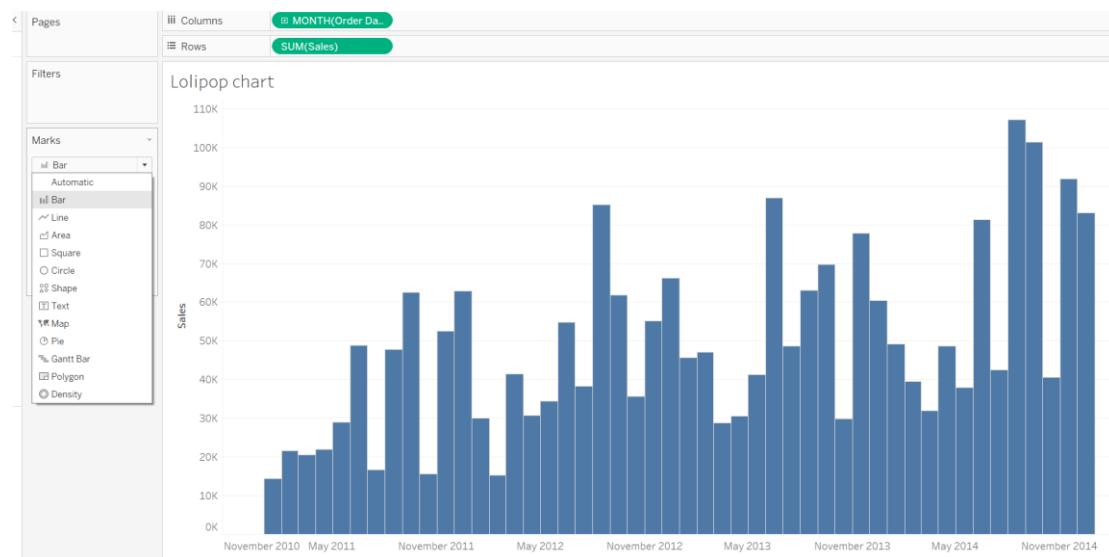
>> Drag "Order Date" drop it to columns >> convert it to month



>> Drag and drop "Sales" to row

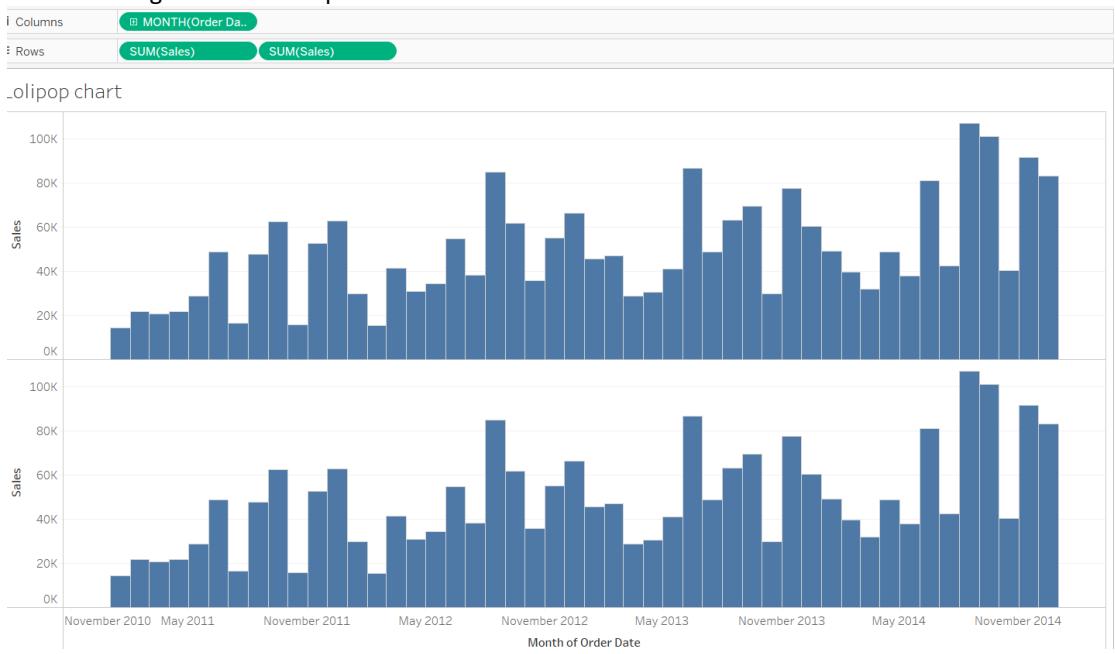


>> converting to bar chart

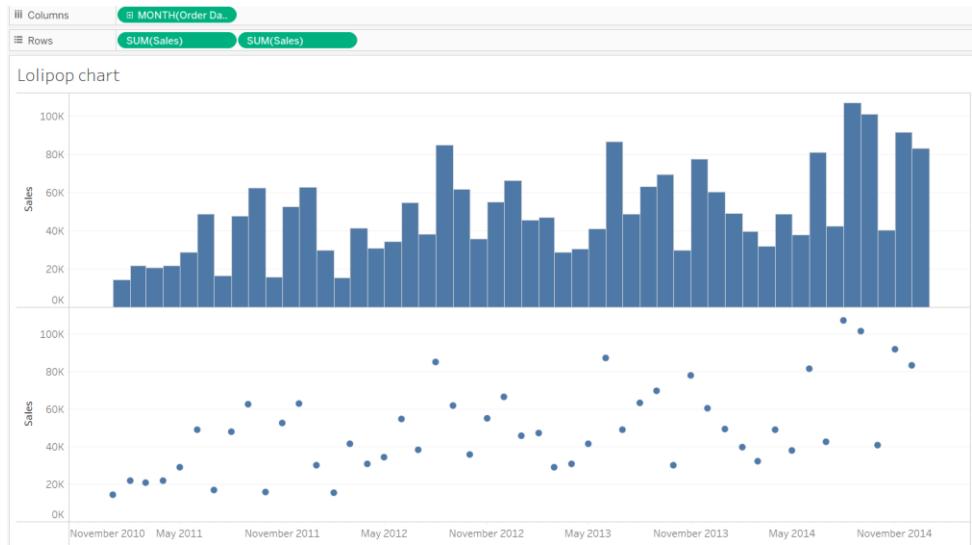


>> Now we want to convert this to lollipop chart ..

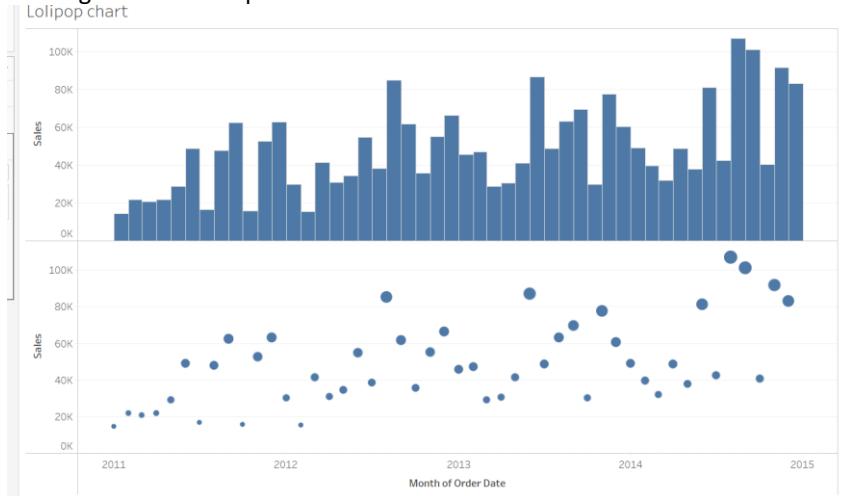
Control + drag sum ... do a duplicate



>> Select the 2nd chart and change it to circle.

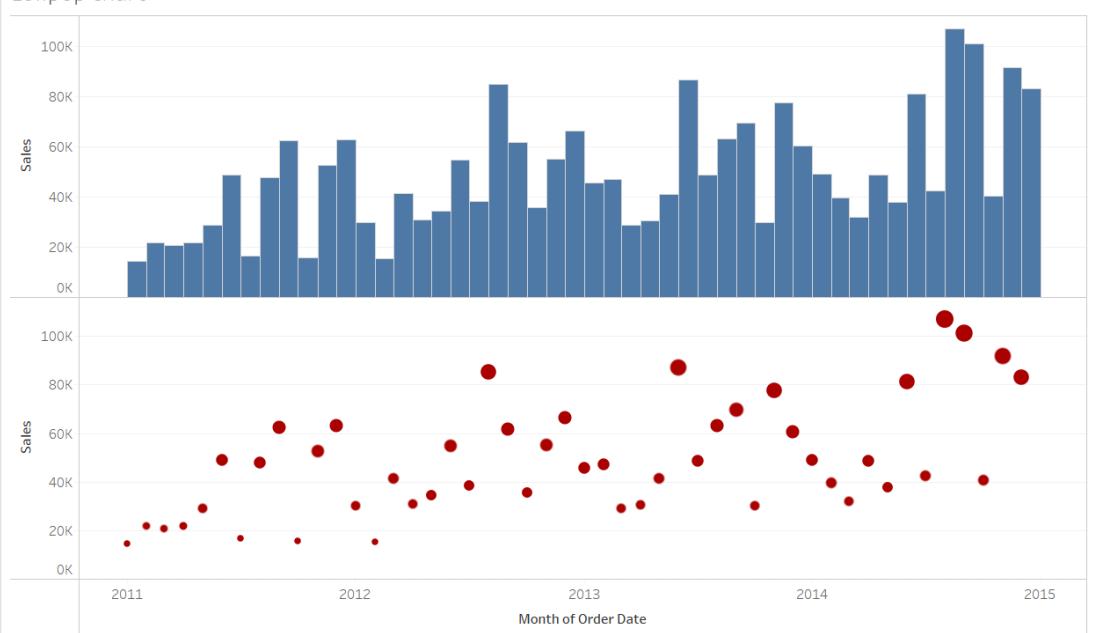


>> Drag the sales and put it to the size

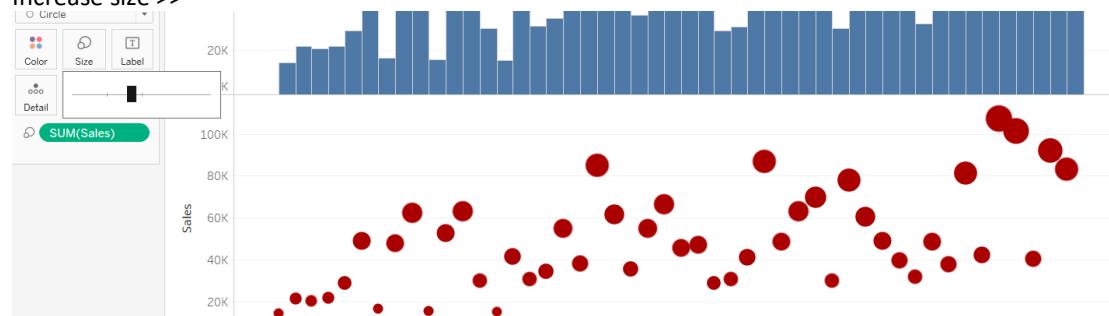


>> Change the color ..

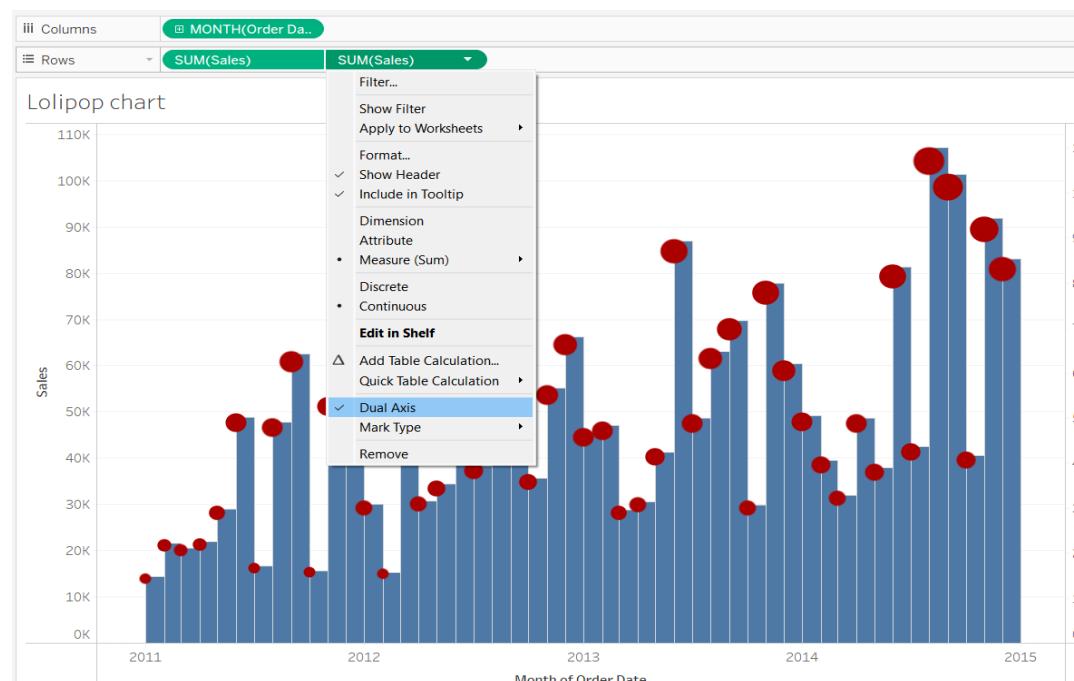
Lollipop chart



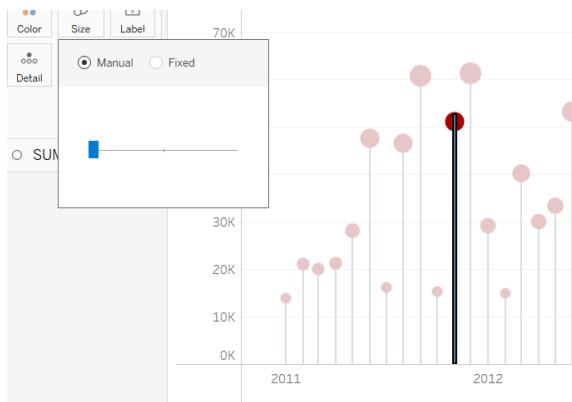
Increase size >>



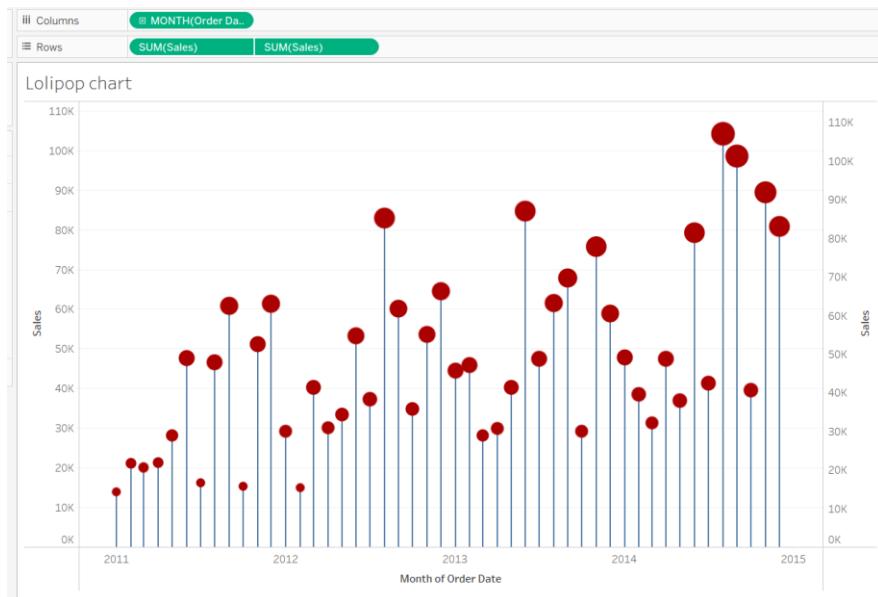
>> Dual axis to merge



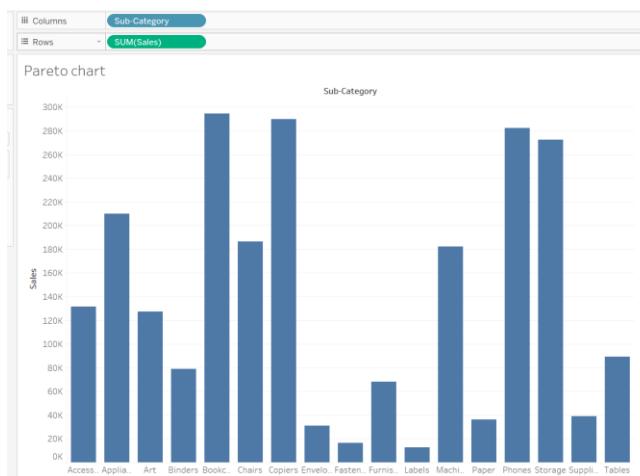
>> To reduce the size of bar chart .. >> select one bar > go size > click manual



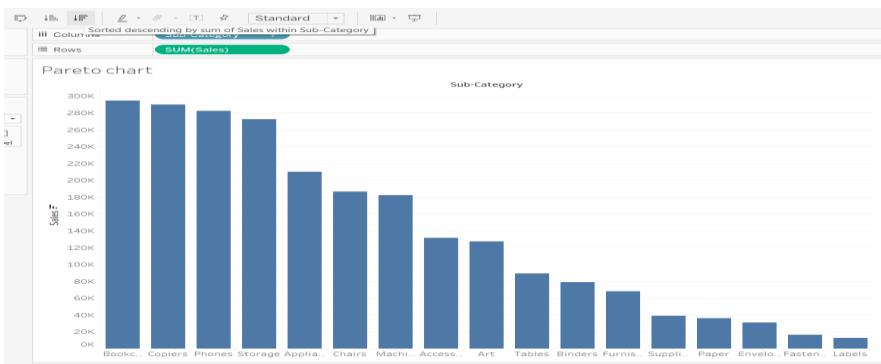
Final Lollipop Chart



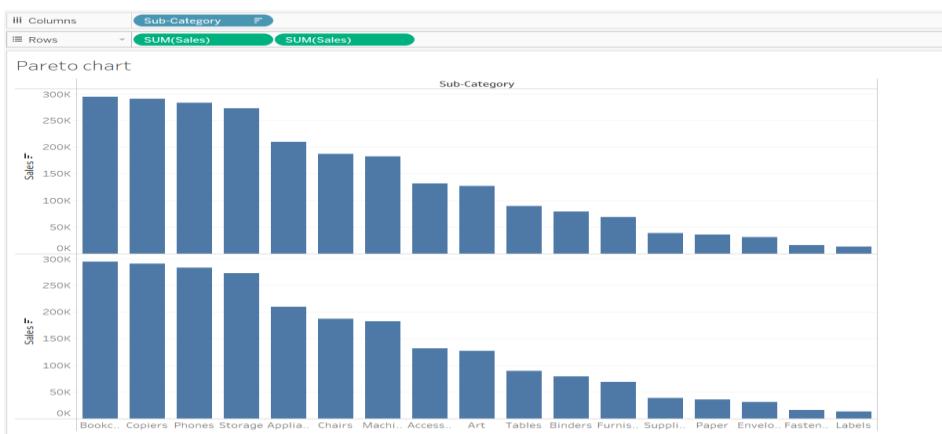
>>> Pareto Chart : To find it out what are the sub-category which give 80 percent info.
Drag and drop : sub-category and sales



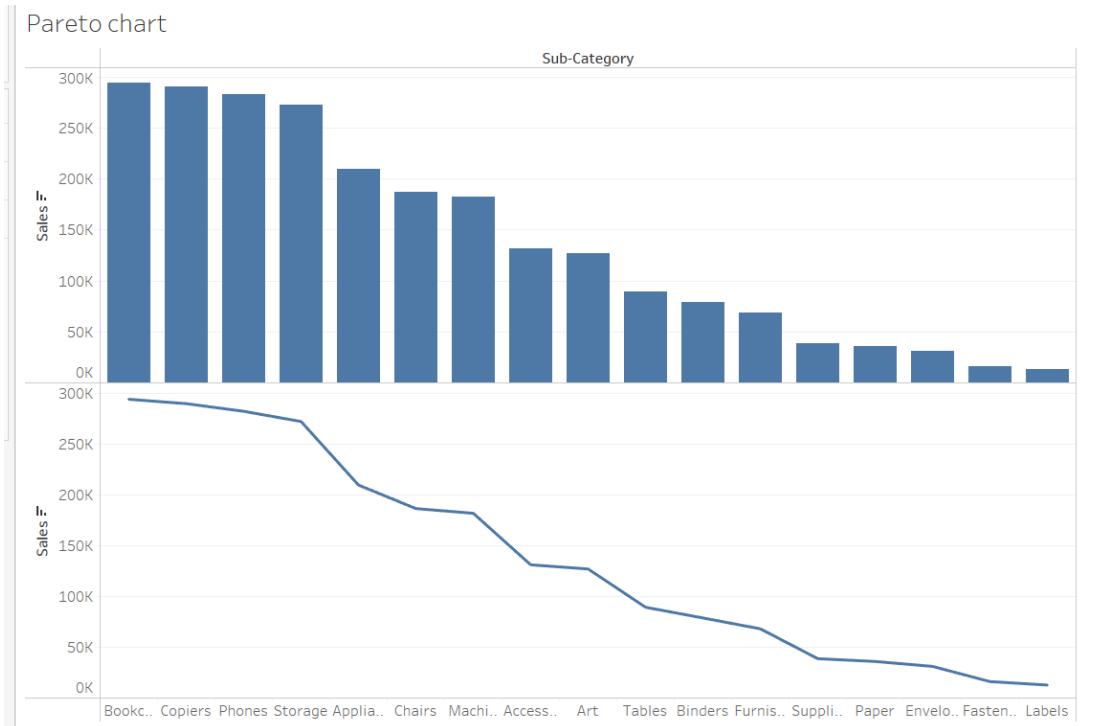
>> Do it in descending order

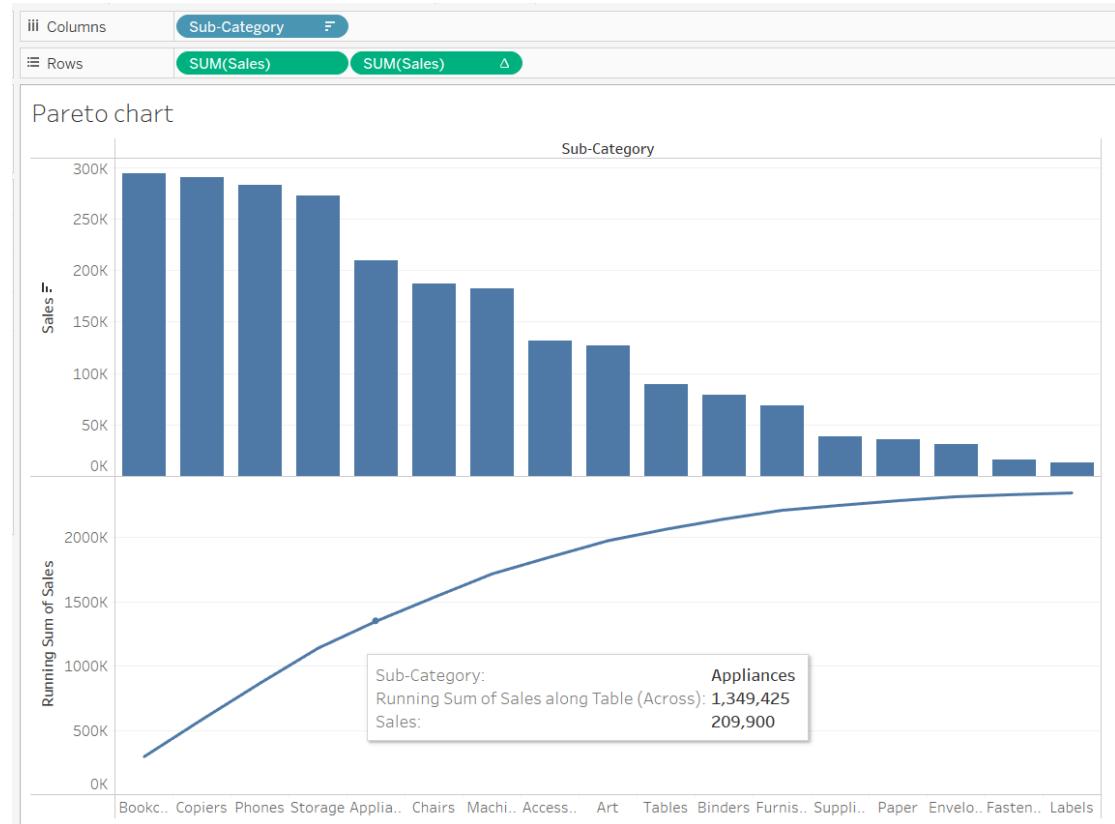
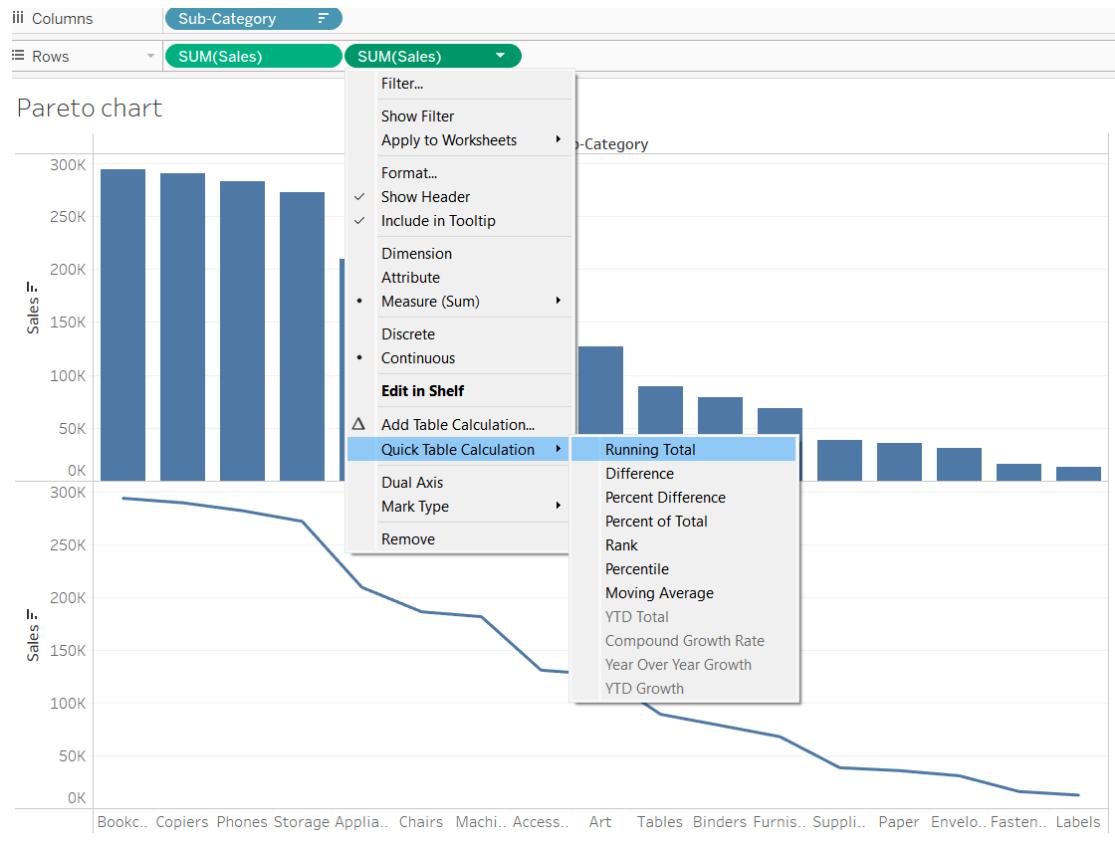


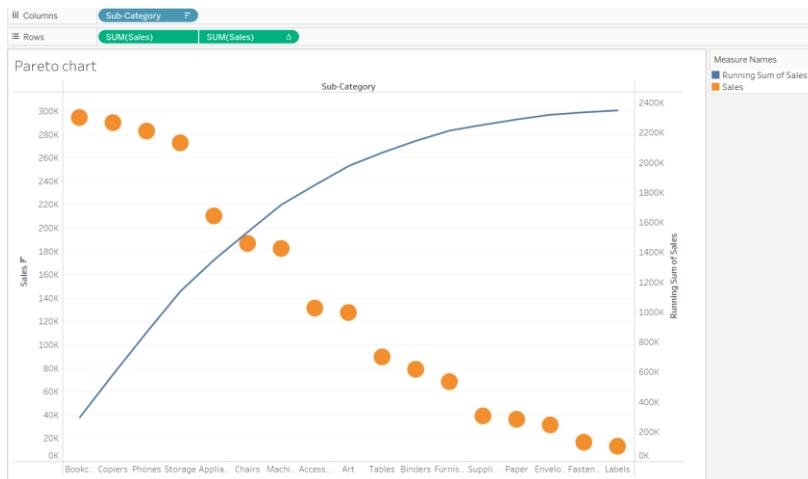
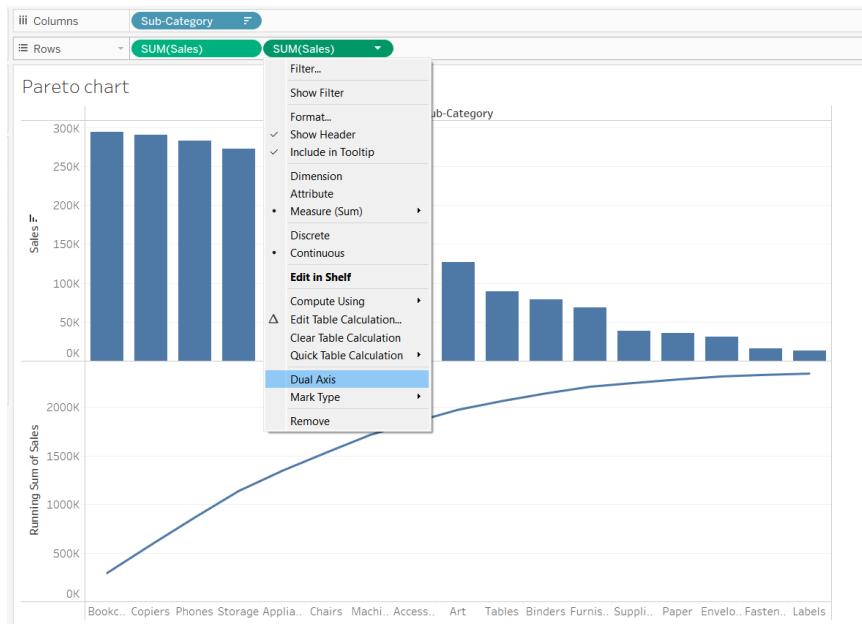
>> do it duplicate



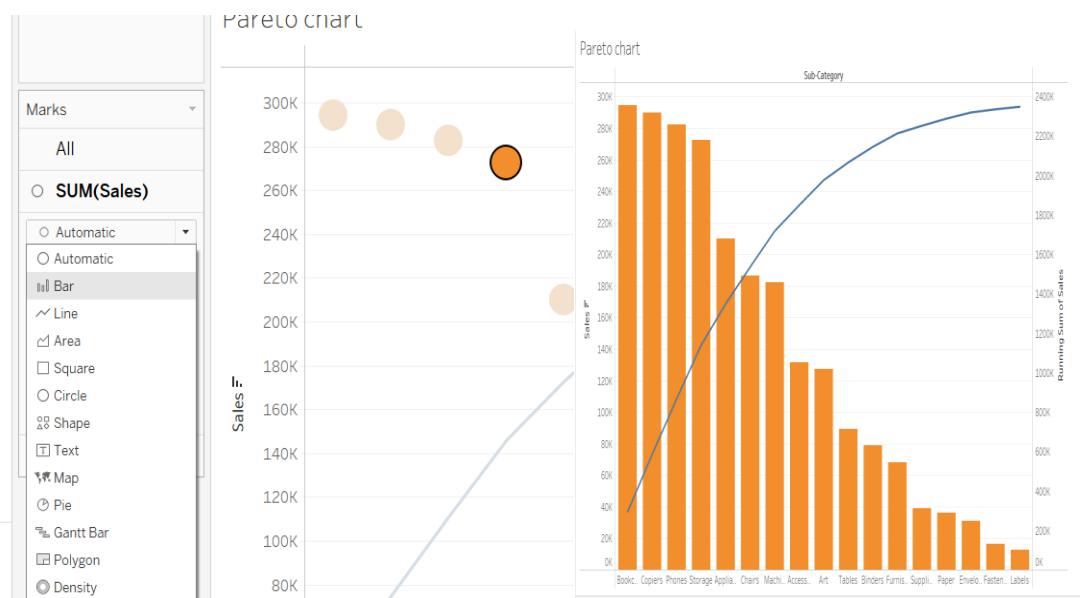
>> Select the 2nd one and convert it to line chart

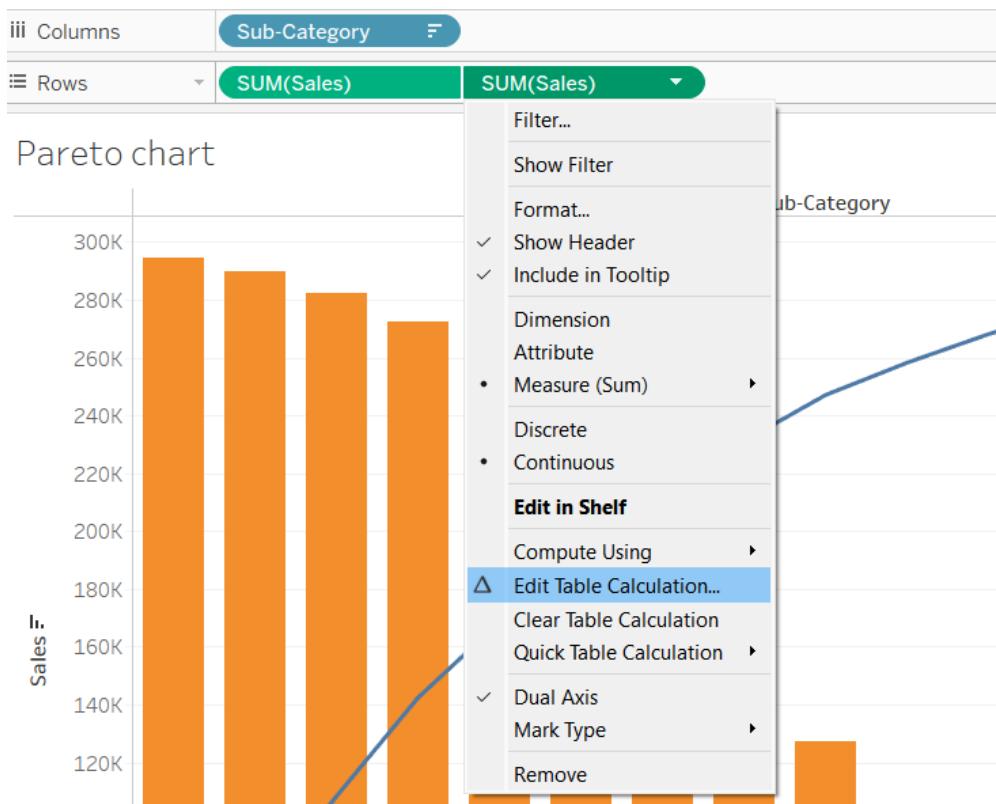




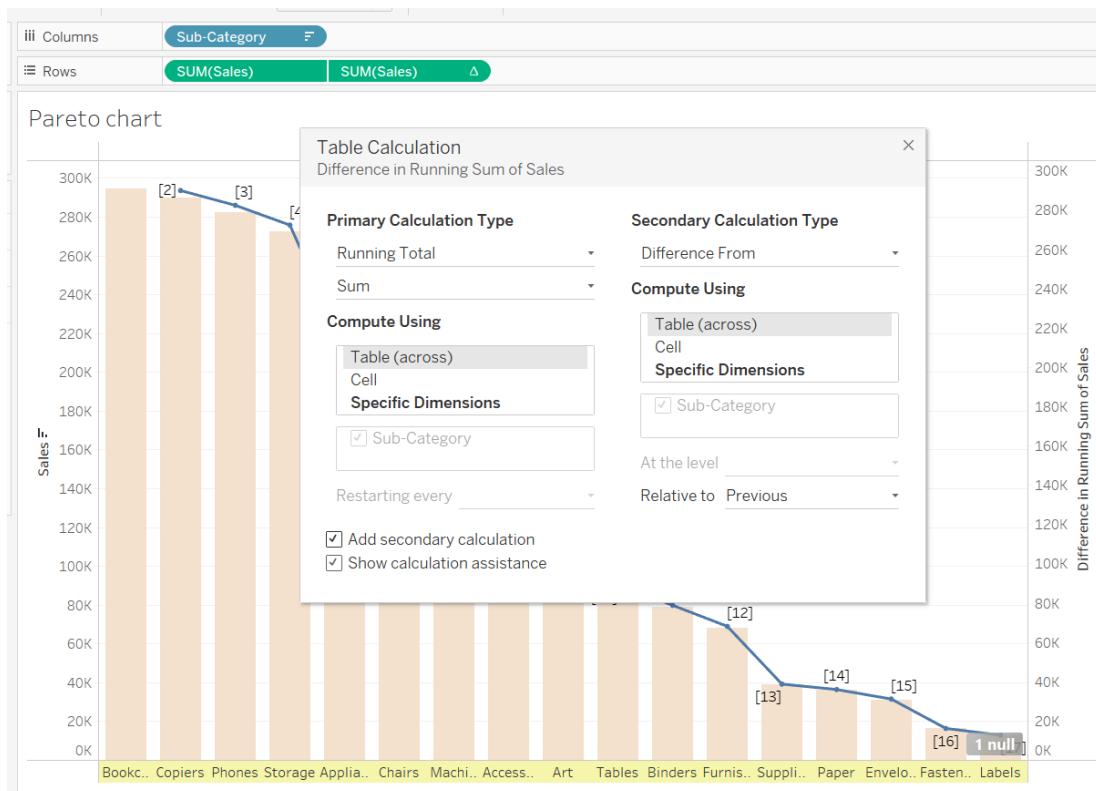


Select circle then > bar





>> tik mark > add secondary calculation



>> Select percent of total

Table Calculation
Difference in Running Sum of Sales

Primary Calculation Type
Running Total
Sum

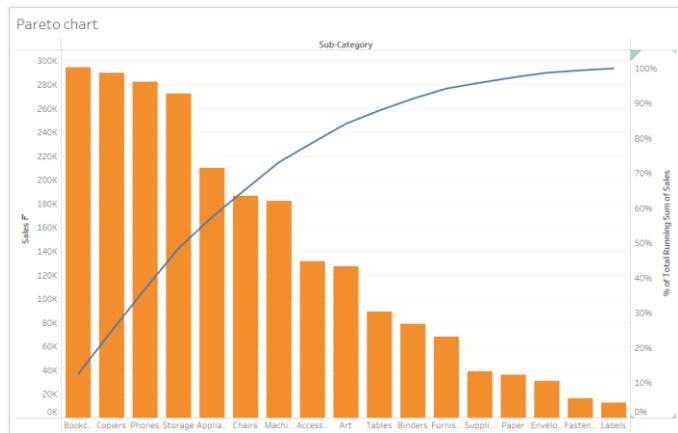
Compute Using
Table (across)
Cell
Specific Dimensions
 Sub-Category

Secondary Calculation Type
Difference From
Difference From
Percent Difference From
Percent From
Percent of Total
Rank
Percentile
 Sub-Category

At the level
Relative to Previous

Restarting every

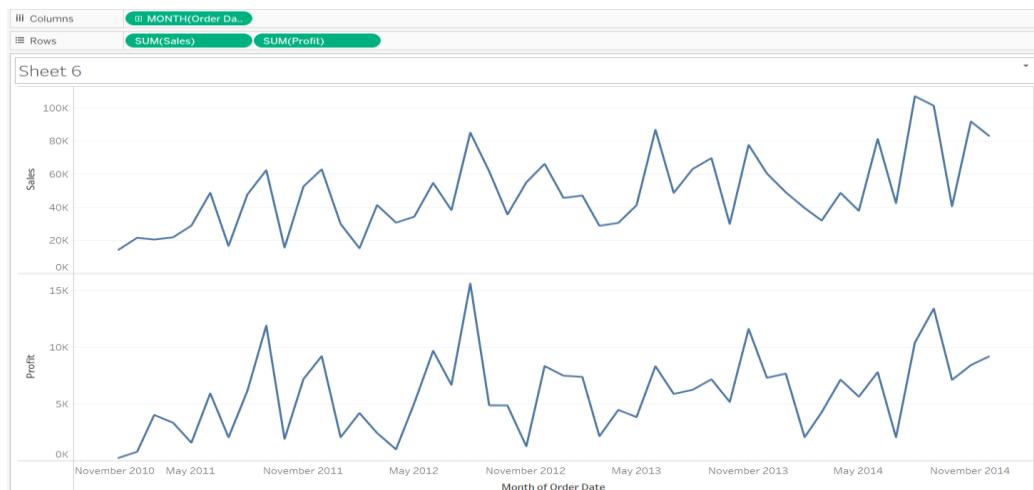
Add secondary calculation
 Show calculation assistance



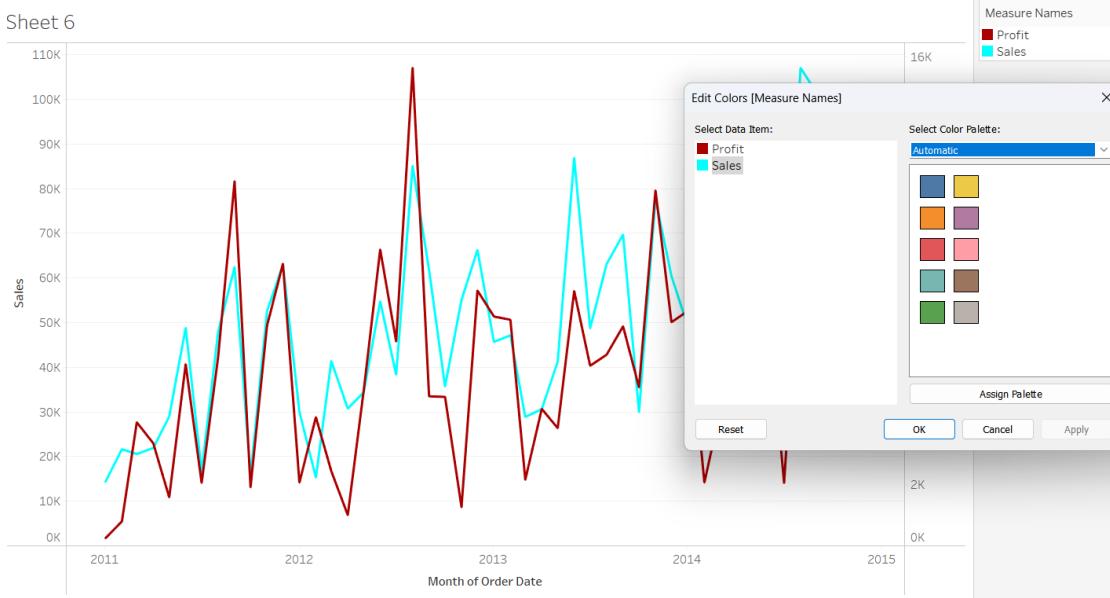
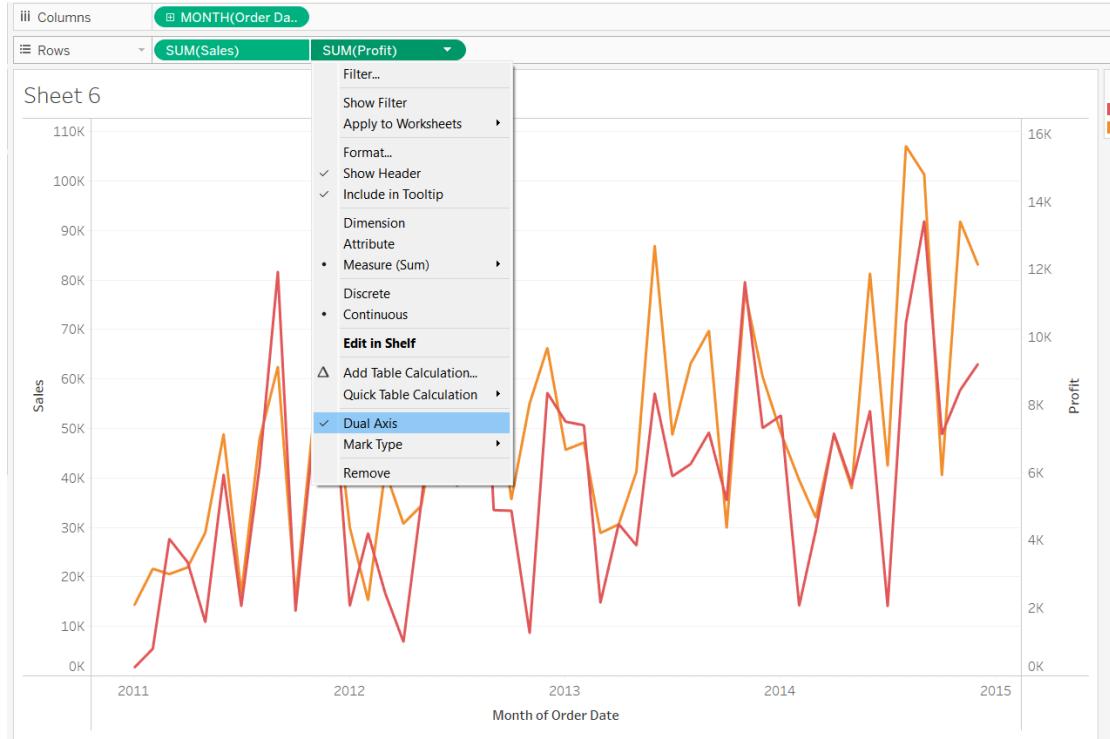
>> Take a new sheet >>Drag the order date >> change it to month



>> take sales and profit



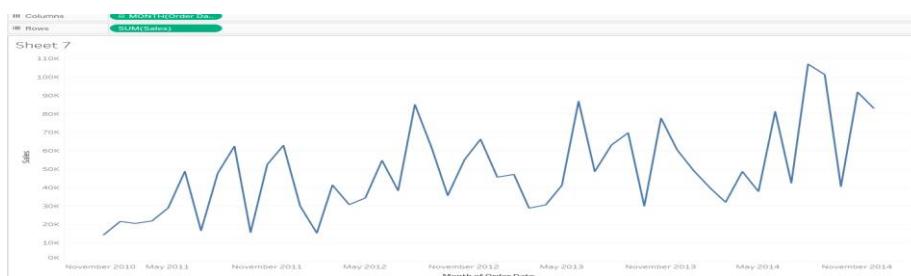
Dual axis :



>> we want to see more one particular percent of sales ... using if condition

>>> Create a new sheet

>> take order date and change it to month >> Take sales





>> swap it



>> Now we will see which are the months the condition fulfilled ..

>> create calculated field .

Data Analytics

ListOfOrders+ (P1-Amazi...

Search ✖ ▼ grid refresh

Create Calculated Field...

- Create Parameter...
- Group by Folder
- Group by Data Source Table
- Sort by Name
- Sort by Data Source Order
- Hide All Unused Fields
- Show Hidden Fields
- Expand All
- Collapse All

Abc Category

Abc Product Name

Abc Sub-Category

▼ Abc Country, State ,City

- Country
- State
- City

Abc Measure Names

▼ OrderBreakdown

- # Discount
- # Profit
- # Quantity
- # Sales

Pages

iii Columns

Rows

Month of Order Da..

Sheet 7

Month of Order D..

January 2011	14,335
February 2011	21,646
March 2011	20,567
April 2011	21,920
May 2011	28,955
June 2011	48,837
July 2011	16,635
August 2011	47,822
September 2011	62,455
October 2011	15,670
November 2011	52,567

Sales Performance

February 2013 47,151

March 2013 30,022

Apply OK

Sales Performance

```
if SUM([Sales])>30000 then
    "Good"
ELSE
    "Bad"
END
```

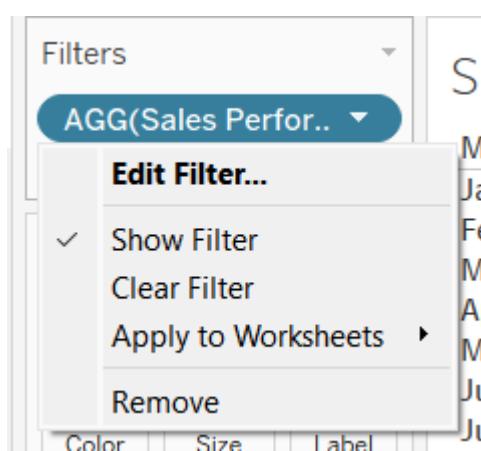
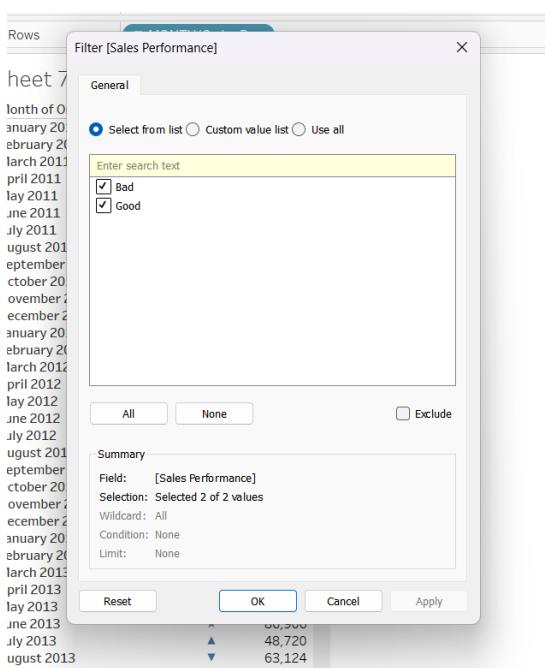
The calculation is valid.

1 Dependency

September 2012 61,777

Apply OK

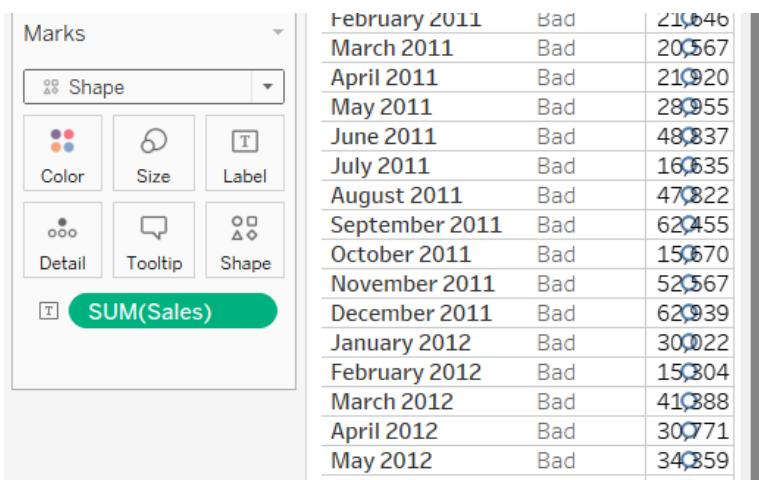
Putting it to the filter:



ROWS MONTH(Order Da... Sales Performance

Sheet 7

Month of Order D..	Sales Per..	
January 2011	Bad	14,335
February 2011	Bad	21,646
March 2011	Bad	20,567
April 2011	Bad	21,920
May 2011	Bad	28,955
June 2011	Bad	48,837
July 2011	Bad	16,635
August 2011	Bad	47,822
September 2011	Bad	62,455
October 2011	Bad	15,670
November 2011	Bad	52,567
December 2011	Bad	62,939
January 2012	Bad	30,022
February 2012	Bad	15,304
March 2012	Bad	41,388
April 2012	Bad	30,771
May 2012	Bad	34,359
June 2012	Bad	54,760



Month of Order D.. Sales Per..

January 2011	Bad	○	14,335
February 2011	Bad	○	21,646
March 2011	Bad	○	20,567
April 2011	Bad	○	21,920
May 2011	Bad	○	28,955
June 2011	Bad	○	48,837
July 2011	Bad	○	16,635
August 2011	Bad	○	47,822
September 2011	Bad	○	62,455
October 2011	Bad	○	15,670
November 2011	Bad	○	52,567
December 2011	Bad	○	62,939
January 2012	Bad	○	30,022
February 2012	Bad	○	15,304
March 2012	Bad	○	41,388
April 2012	Bad	○	30,771
May 2012	Bad	○	34,359
June 2012	Bad	○	54,760

>> Drag sales to shape

Sheet 7

Month of Order D.. Sales Per..

Month of Order D..	Sales Per..	Shape	Value
January 2011	Bad	○	14,335
February 2011	Bad	◊	21,646
March 2011	Bad	*	20,567
April 2011	Bad	△	21,920
May 2011	Bad	◀	28,955
June 2011	Bad	▶	48,837
July 2011	Bad	×	16,635
August 2011	Bad	◊	47,822
September 2011	Bad	◊	62,455
October 2011	Bad	+	15,670
November 2011	Bad	○	52,567
December 2011	Bad	△	62,939
January 2012	Bad	○	30,022
February 2012	Bad	□	15,304
March 2012	Bad	□	41,388
April 2012	Bad	+	30,771
May 2012	Bad	*	34,359
June 2012	Bad	□	54,760
July 2012	Bad	▼	38,345
August 2012	Bad	×	85,111
September 2012	Bad	*	61,777
October 2012	Bad	◊	35,686
November 2012	Bad	+	55,079
December 2012	Bad	◀	66,278

Edit Shape [Sales]

Select Data Item:

- 14,335
- 15,304
- + 15,670
- × 16,635
- * 20,567
- ◊ 21,646
- △ 21,920
- ▽ 28,876
- ▲ 28,955
- ▶ 29,938
- 30,022
- 30,627
- + 30,771
- × 32,044
- * 34,359
- ◇ 35,686

Select Shape Palette:

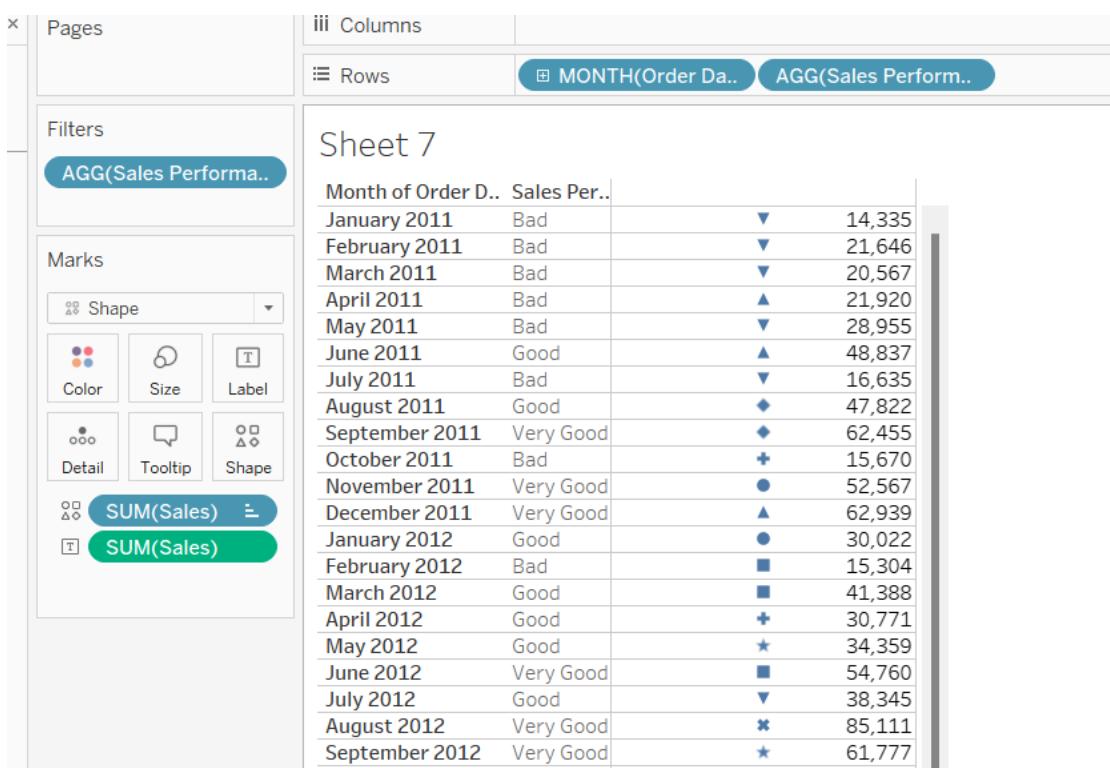
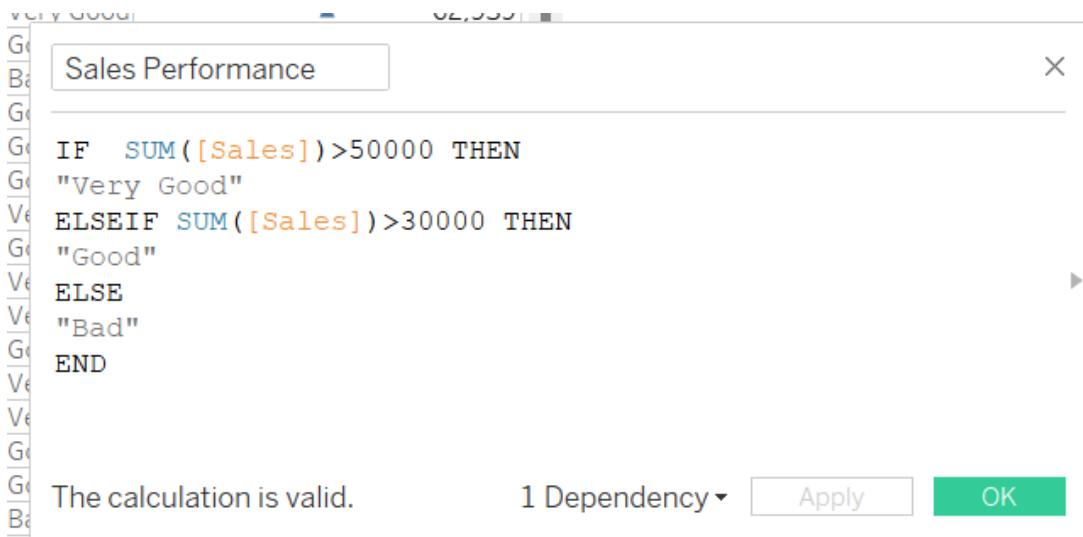
Filled

Assign Palette Reload Shapes

OK Cancel Apply

Reset

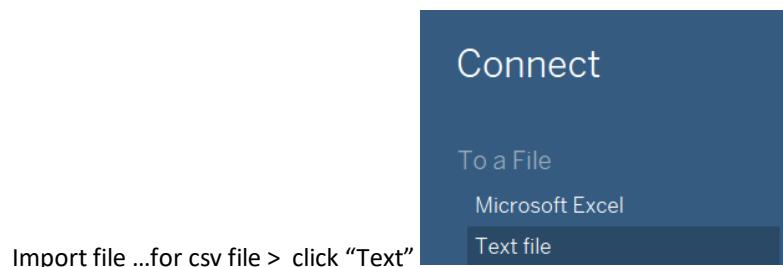
Σ 62,939



Need to be corrected the shape

.....

Working with Bank_data_Set



>> After importing data ..change the data format of “Region table” to State / Province

UK-Bank-Customers.csv	Region	String	State/Province
Age	Region	String	State/Province
21	England	Date	State/Province
34	North	✓ String	State/Province
46	England	Boolean	State/Province
32	Wales	✓ Default	State/Province
38	England	Geographic Role	ZIP Code/Postcode
30	Wales	Image Role	09.Jan.15
34	England	Blue Collar	11.Jan.15
48	Scotland	Other	11.Jan.15
33	Wales	White Collar	11.Jan.15
42	England	White Collar	12.Jan.15

>> Change the format for data joined column ... change it to date format

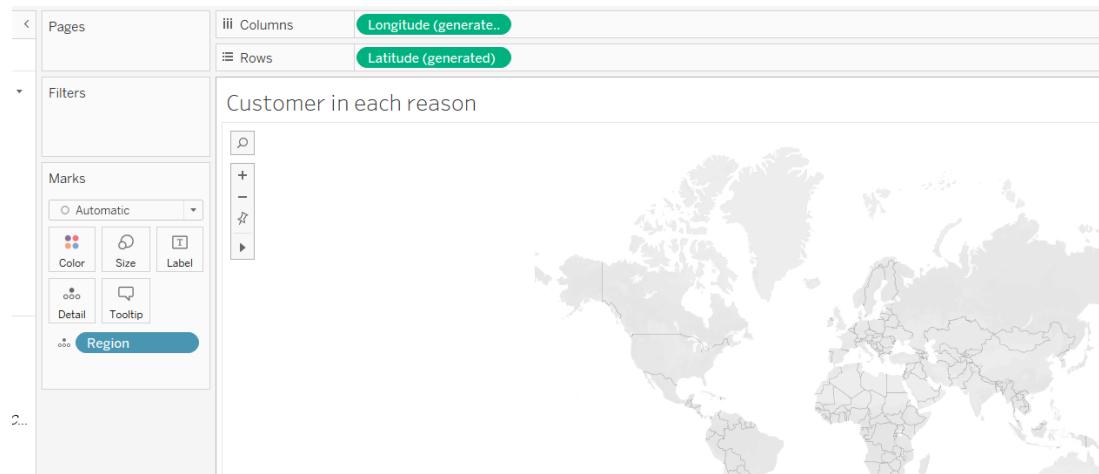
>> Click on ABC and change it.

UK-Bank-Customers.csv	Date	Date
1/5/2015	✓ Date	0.1
1/6/2015	String	9.7
1/7/2015	Spatial	6.8
1/8/2015	Boolean	1.5
1/9/2015	Default	9.7

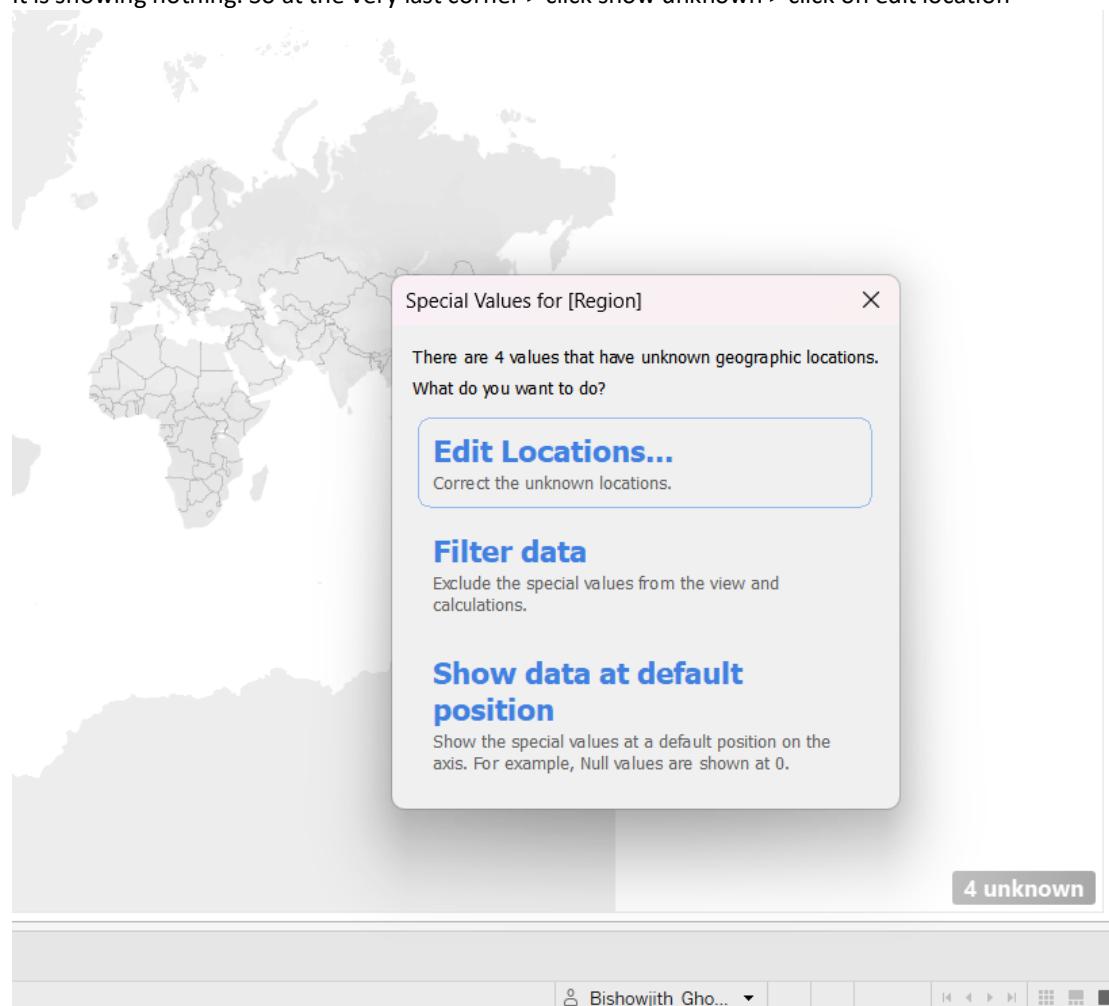
> Click on sheet one

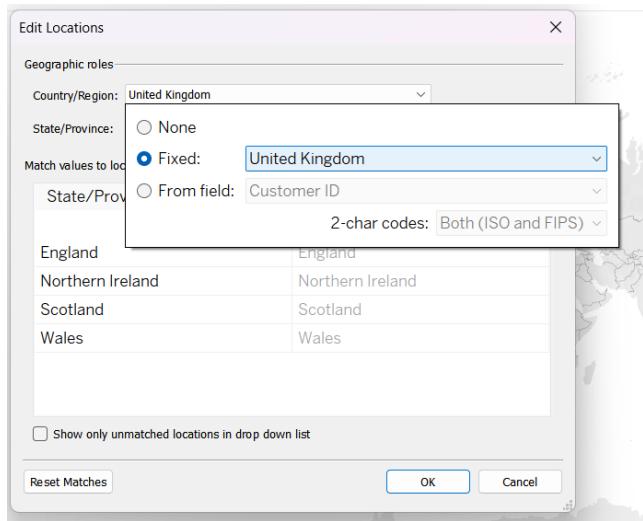
>> We will analyze customer In each reason.

>> drag and drop > region

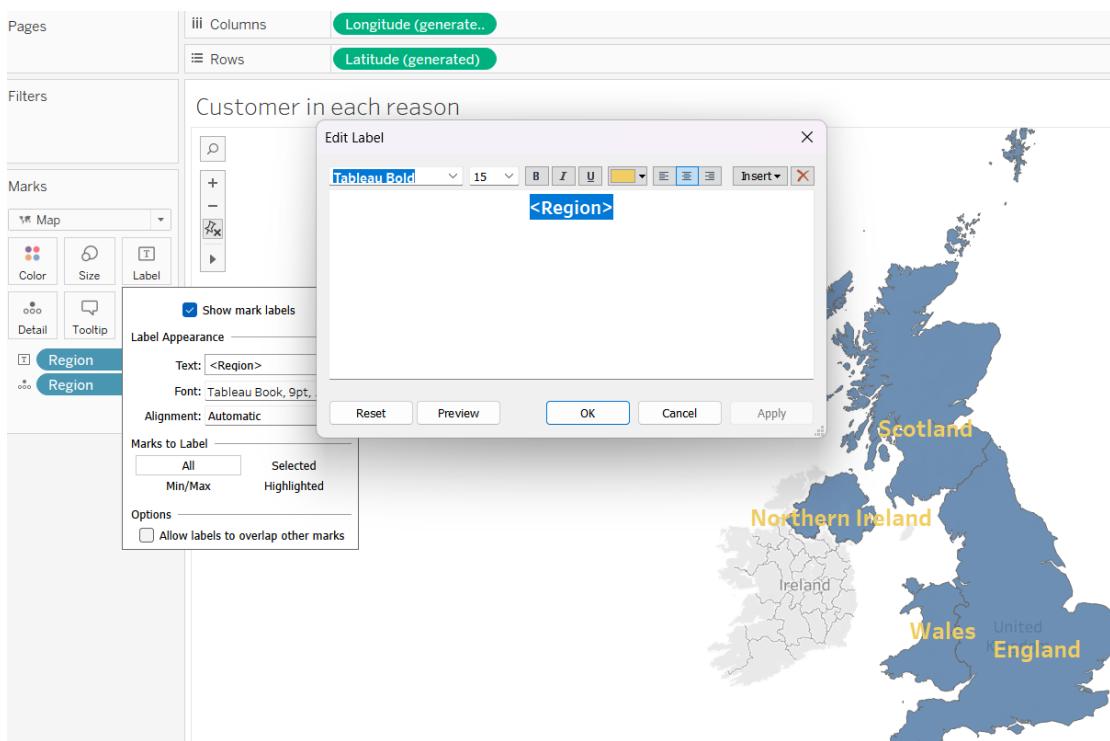


It is showing nothing. So at the very last corner > click show unknown > click on edit location



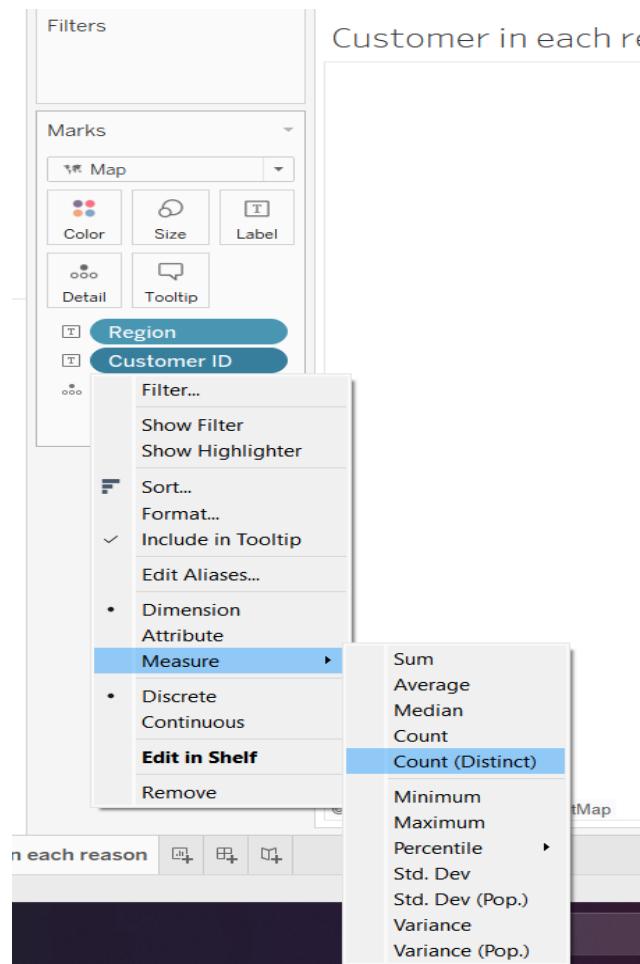


>> Drag and drop region to label

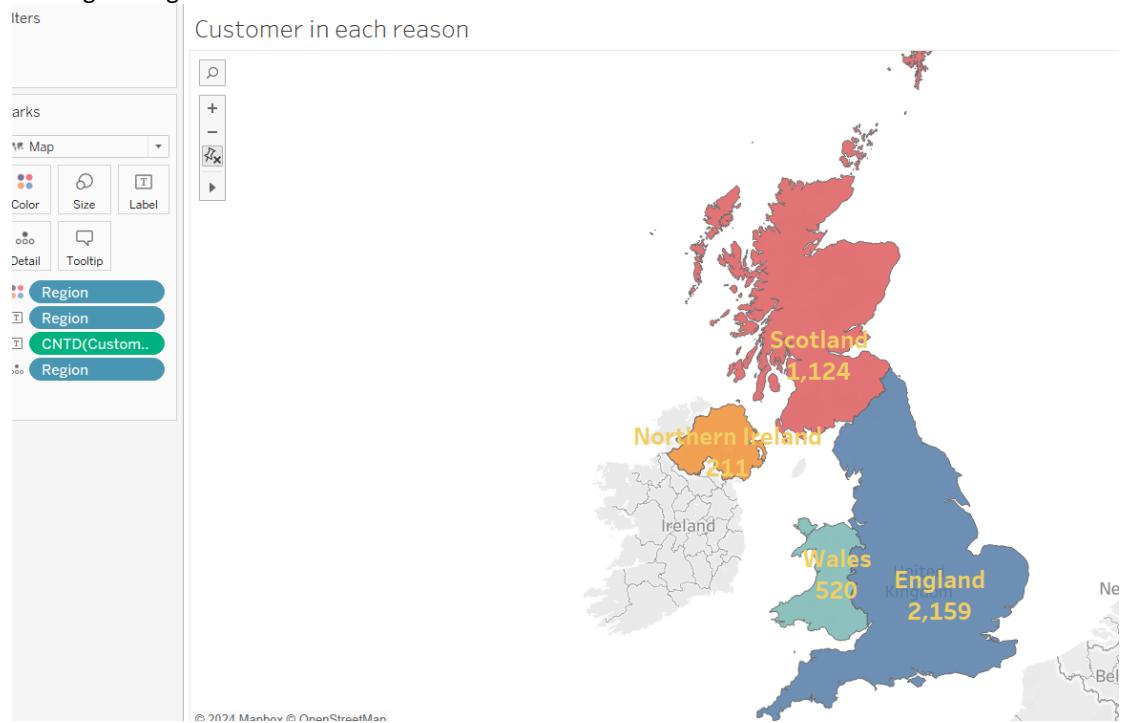


> I want to know in which region how many customers ..

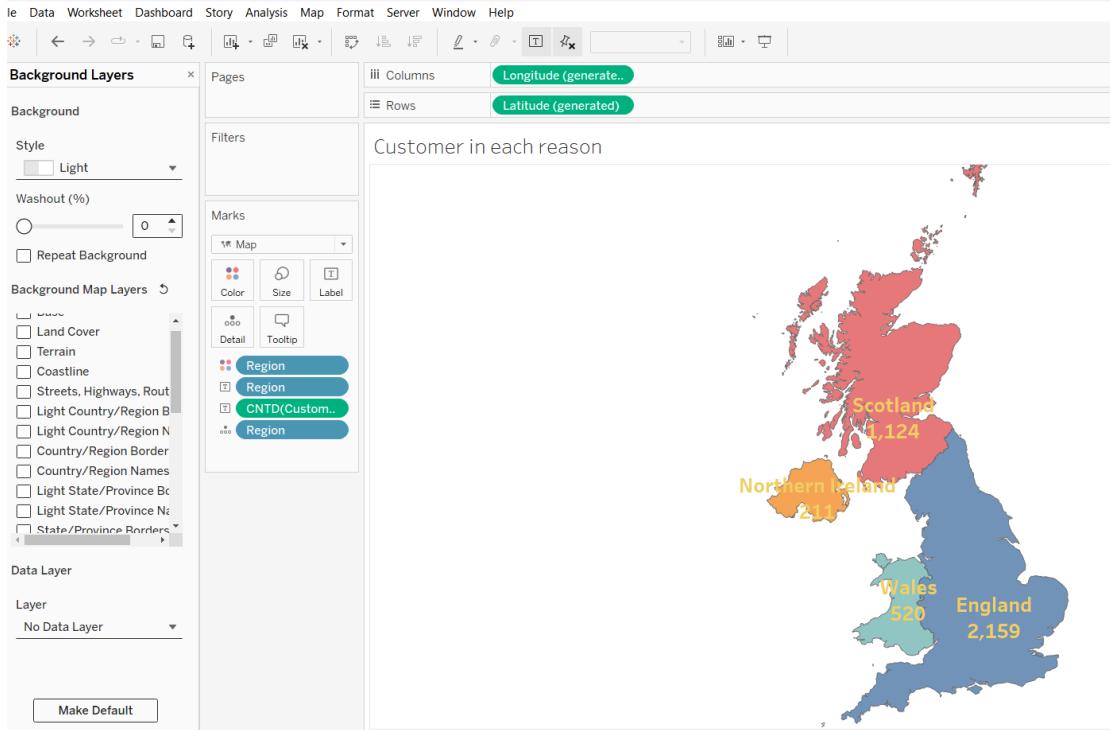
>> Drag and drop the customer ID



>> Drag the region in color



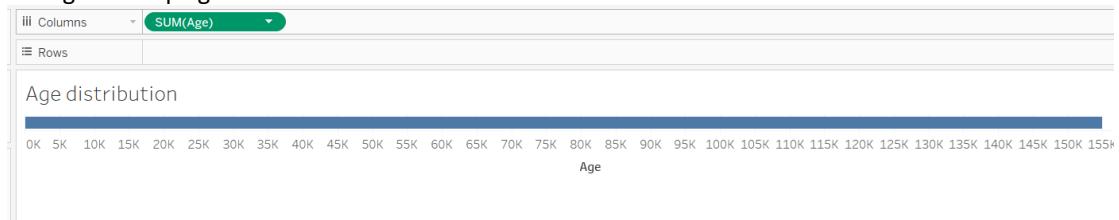
>> Go map menu >> map background layer > check out the tick mark to remove the map background.



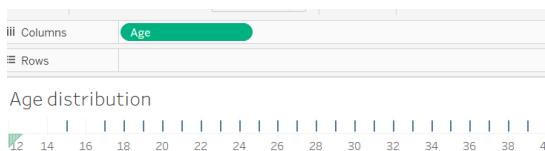
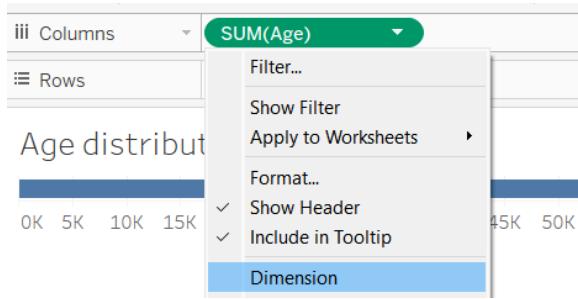
>>> We will look for age distribution

> create a new sheet

> drag and drop age



I don't want sum of data , I want each and every data. Click > dimension :: means categorical not number .



Click > discrete :: it will show each value

The screenshot shows a Tableau interface with a context menu open over the 'Age' dimension. The menu items are:

- Filter...
- Show Filter
- Apply to Worksheets ▾
- Format...
- Show Header
- Include in Tooltip
- Dimension
- Attribute
- Measure ▾
- Discrete

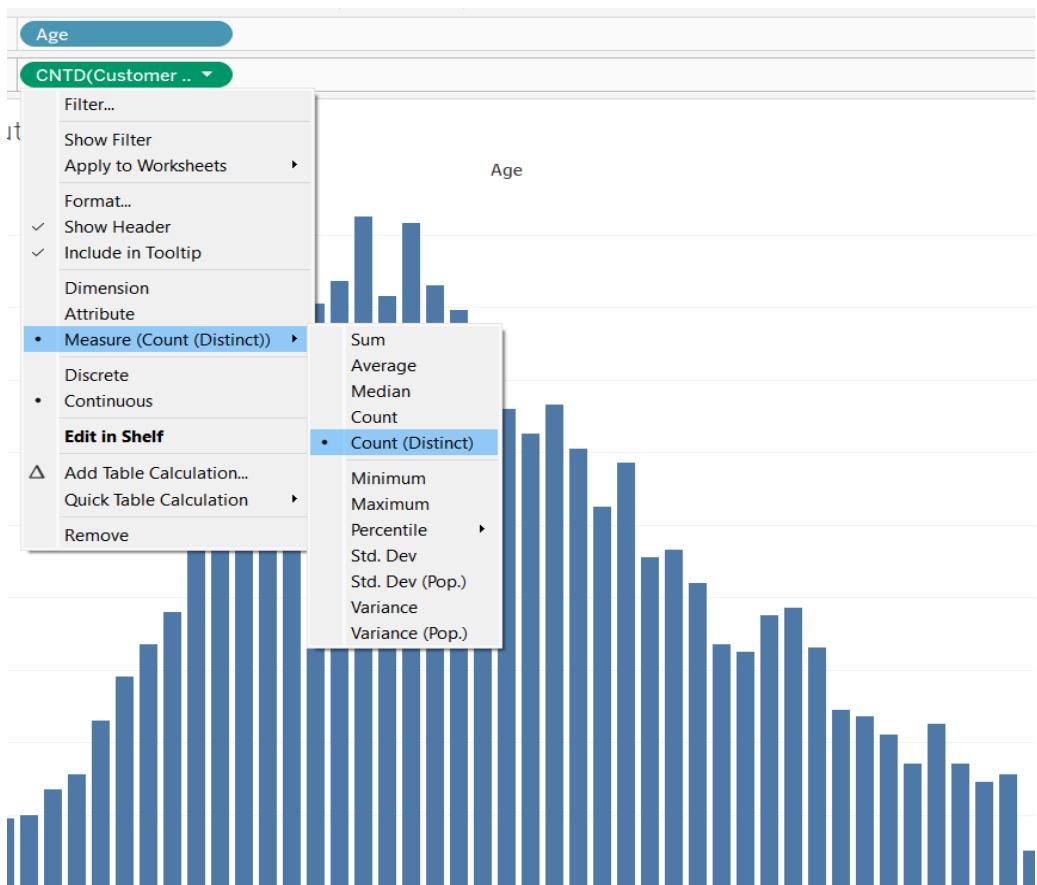
The 'Discrete' option is highlighted with a blue background.

> drag and drop customer id in rows :

The screenshot shows a Tableau interface with a 'Warning' dialog box overlaid. The dialog message is: "The field being added may contain as many as 4014 members and the recommended maximum for this shelf is 1000." It asks, "What do you want to do?" with four options: "Add all members" (highlighted), "Filter and then add", "Disable automatic updates and then add", and "Do not add".

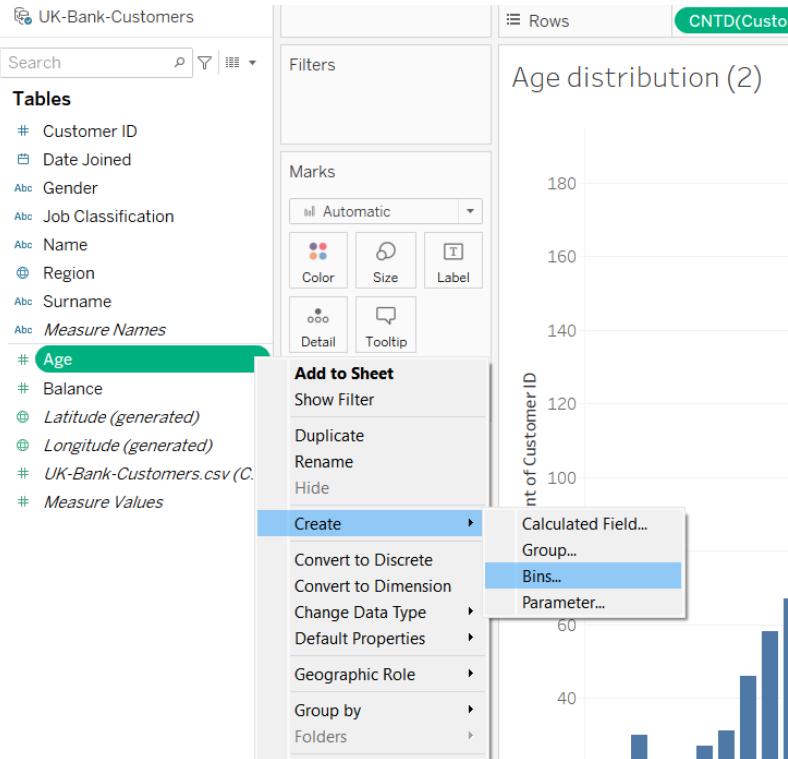
>> add all members

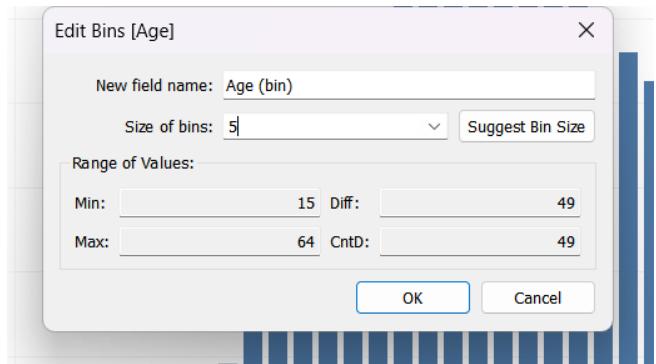
The screenshot shows a Tableau interface with the 'Customer ID' field on the rows shelf. The visualization is titled 'Age distribution'. The columns are labeled from 15 to 27. The data shows numerous rows for 'Customer.. 1000000..', with values 'Abc' appearing at various age intervals (e.g., 15, 21, 22, 23, 24, 26, 27).



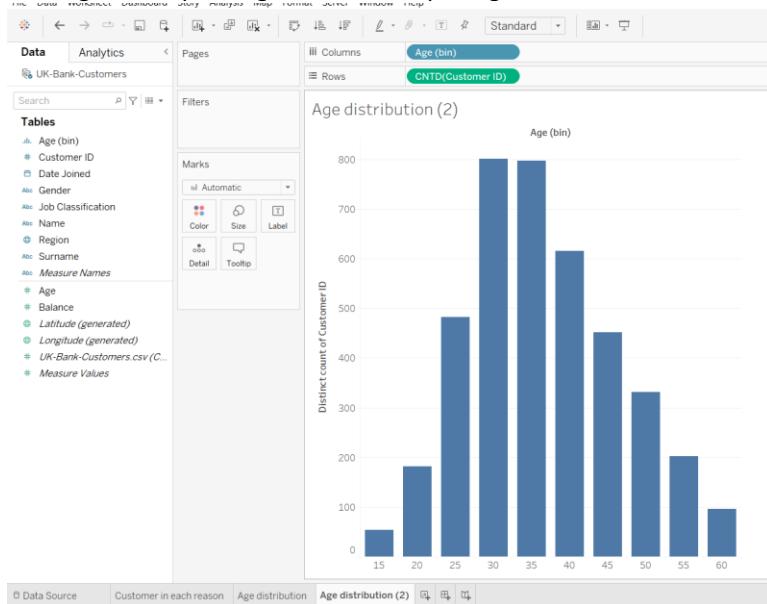
>> In which particular time we have more customers

>> create a duplicate of this page

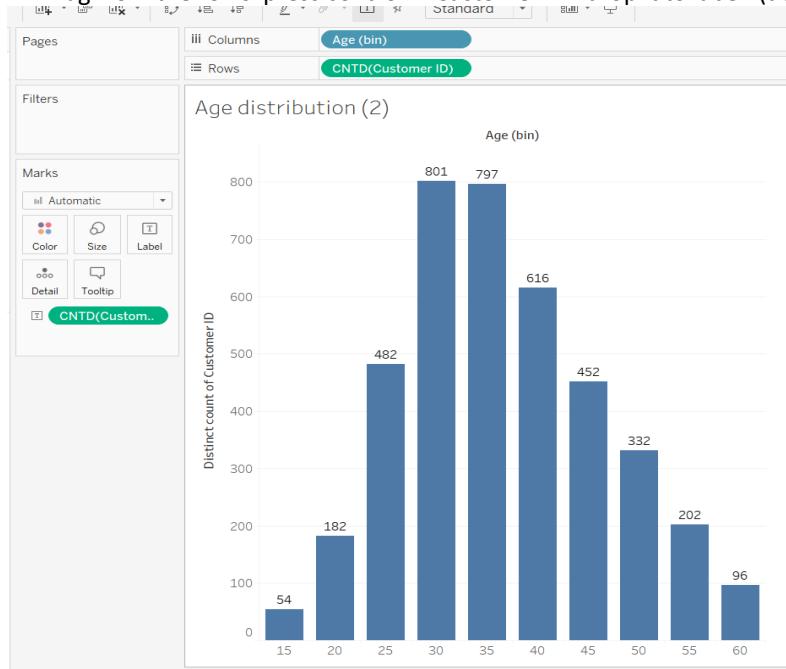




>> Drag and drop the age bin on the top of age



>> Drag from the rows press control +“Customer ID” drop it to label (don’t forget contrl+)



So we can see we have max customer between 30 to 40 years

>> To make it more dynamic we need to create a parameter

Create Parameter

Name: Age (bin) Parameter

Properties:

- Data type: Integer
- Display format: 3

Current value: 3

Value when workbook opens: Current value

Allowable values:

- Range (selected)
- All
- List

Range of values:

- Minimum: 3 (Fixed)
- Maximum: 10 (When workbook opens)
- Step size: 1

Buttons: Cancel, OK

Right click> show parameter

Parameters

Age (bin) Parameter

Add to Sheet

Show Parameter

Cut

Copy

Edit...

Duplicate

Rename

Hide

Delete

Create

Default Properties

Folders

Replace References...

Describe...

Data Source Customer in each reason Age distribution

Tables

- Age (bin)
- Customer ID
- Date Joined
- Gender
- Job Classification
- Name
- Region
- Surname
- Measure Names
- Age
- Balance
- Latitude (generated)
- Longitude (generated)
- UK-Bank-Customers.csv (C...)

Age distribution

Edit Bins [Age]

New field name: Age (bin)

Size of bins: 5 Suggest Bin Size

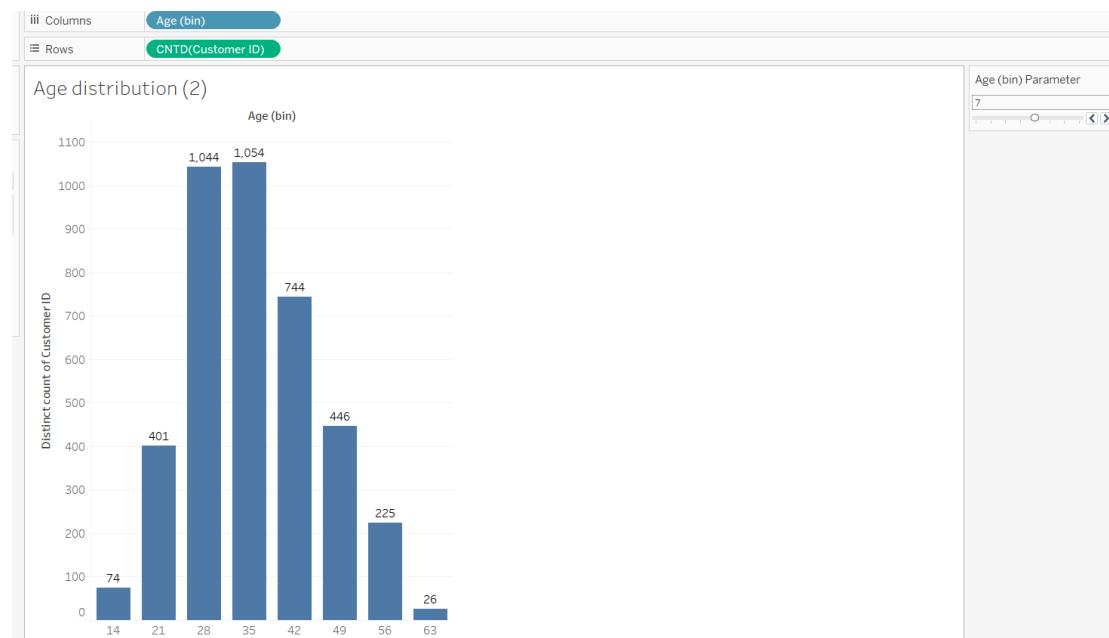
Range of Values: Enter a Value... Create a New Parameter... Age (bin) Parameter

Min: 15 Max: 49

Max: 64 CntD: 49

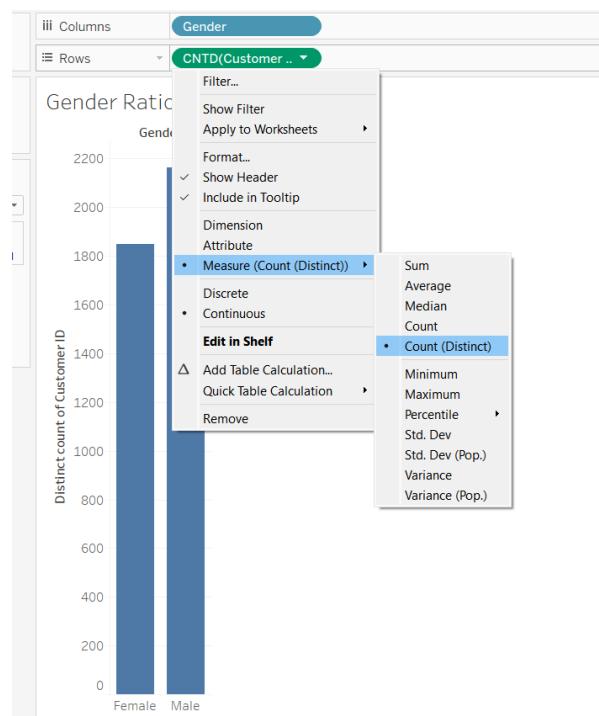
OK Cancel

Change it



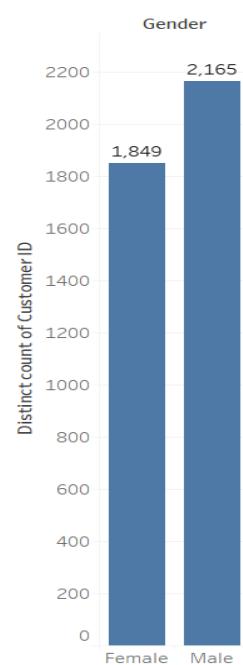
Now the parameter is working ..

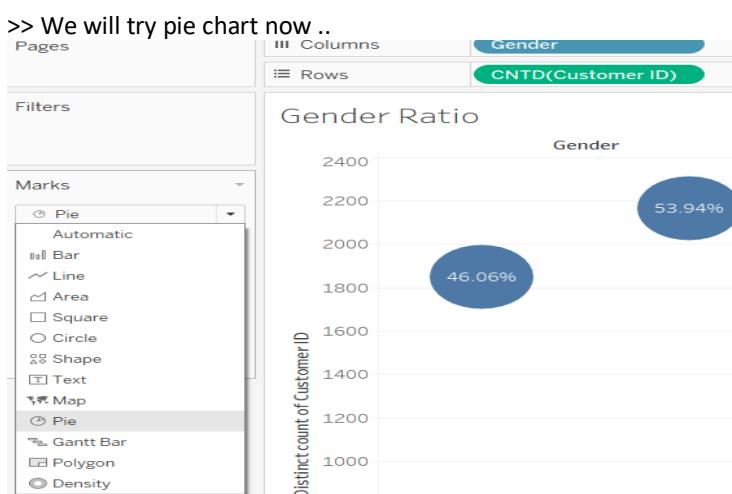
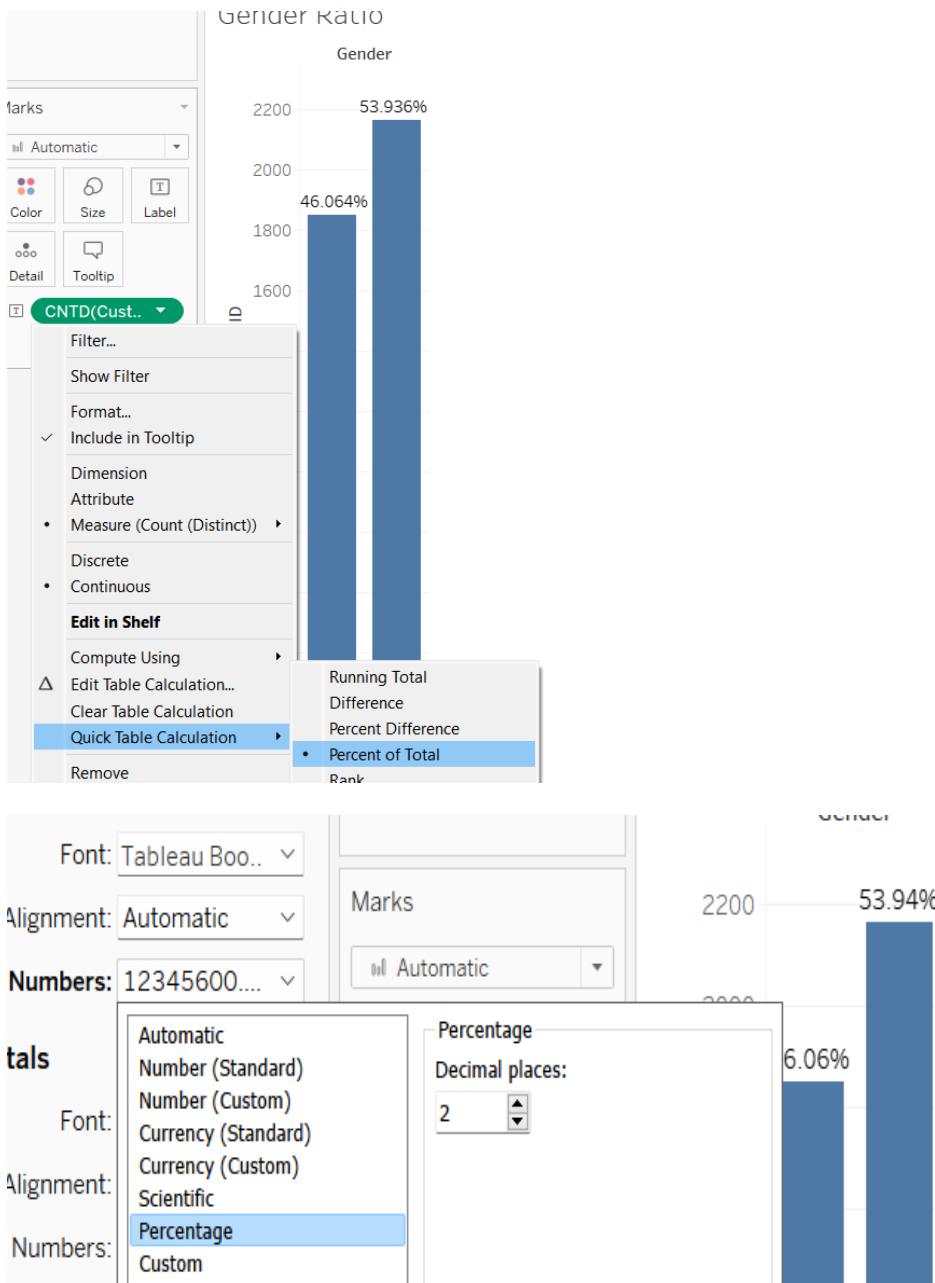
>> Take a new worksheet. Rename it Gender ratio.



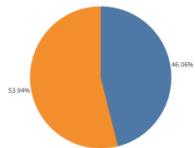
Control + Drag customer id to label:

Gender Ratio

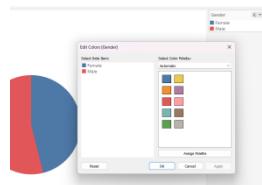




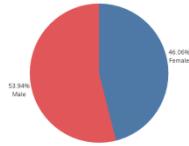
>> Drag and drop "Gender" to color.
 >> Drag and drop "Customer ID" to angle .
 Take from column and rows ...



>> Change color



>> take the gender and put it to label

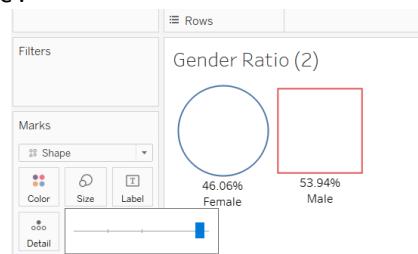


>> Create a duplicate sheet of this one . click > shape

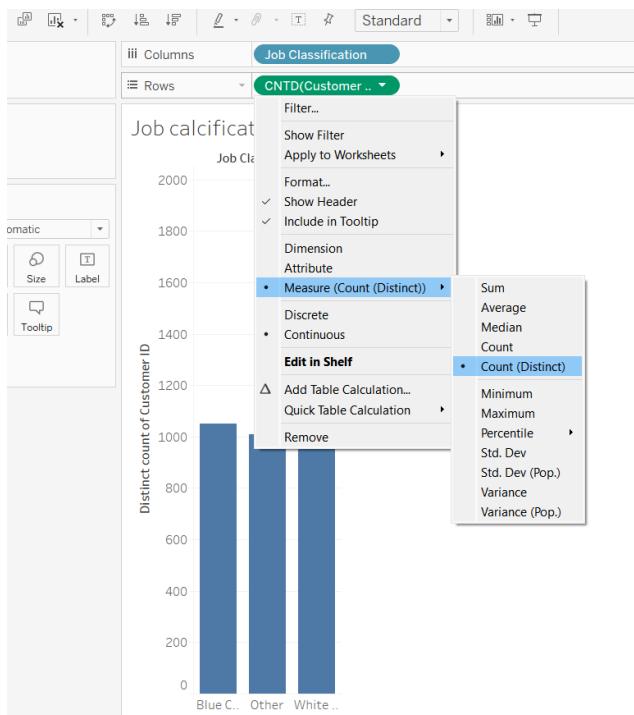
>> Drag the gender and put it into the shape .

Gender Ratio (2)

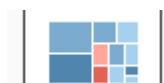
46.06%
Female



>> Job classification distribution: create a new worksheet.



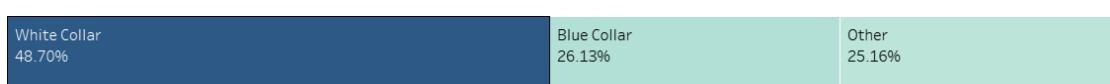
>> change the chart to > tree map (going show me)



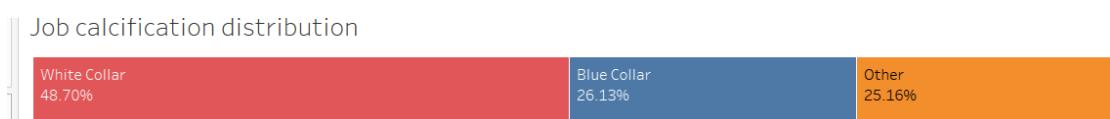
>> take count ..pres control ..drop to label



>> change the last one >> quick label calculation > percent total



>> Drag job classification into color



>> we can change its size: with cursor

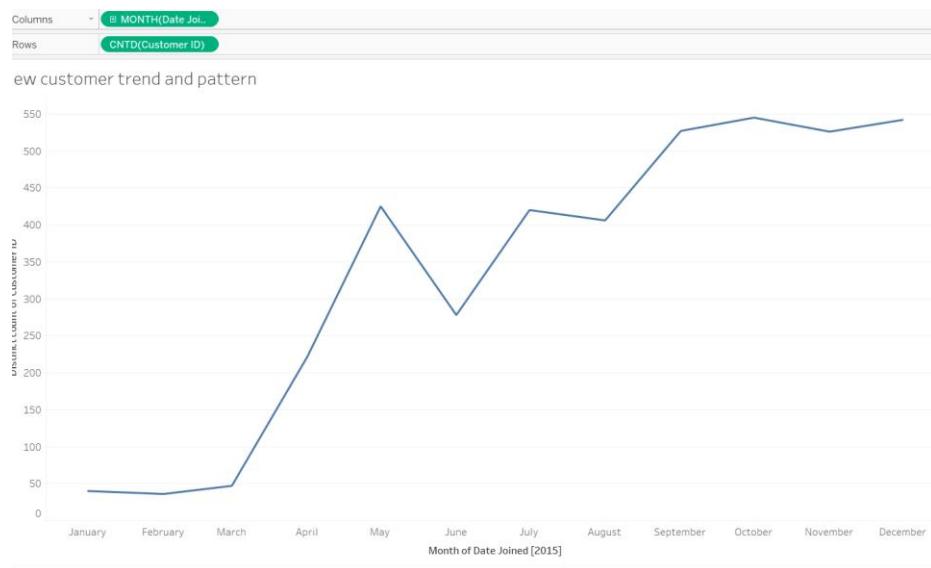
>>> go to new sheet ..rename New customer trend and pattern

>> Drag and drop date joined and convert it to month

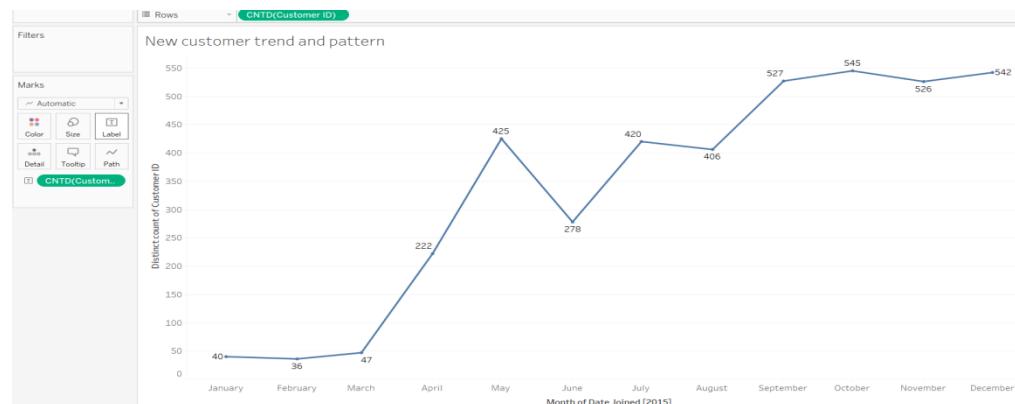
The screenshot shows the Tableau interface with a context menu open over the field 'Date J.'. The menu includes options like 'Filter...', 'Show Filter', 'Show Highlighter', 'Apply to Worksheets', 'Sort...', 'Format...', 'Show Header', 'Include in Tooltip', 'Show Missing Values', 'Standard Gregorian ISO-8601 Week-Based', and a detailed breakdown of the year, quarter, month, day, and more. The 'Month' option is highlighted.

>> I want to see for which particular month many many customer joined

>> drag and drop customer id to rows > click > measure > count distinct



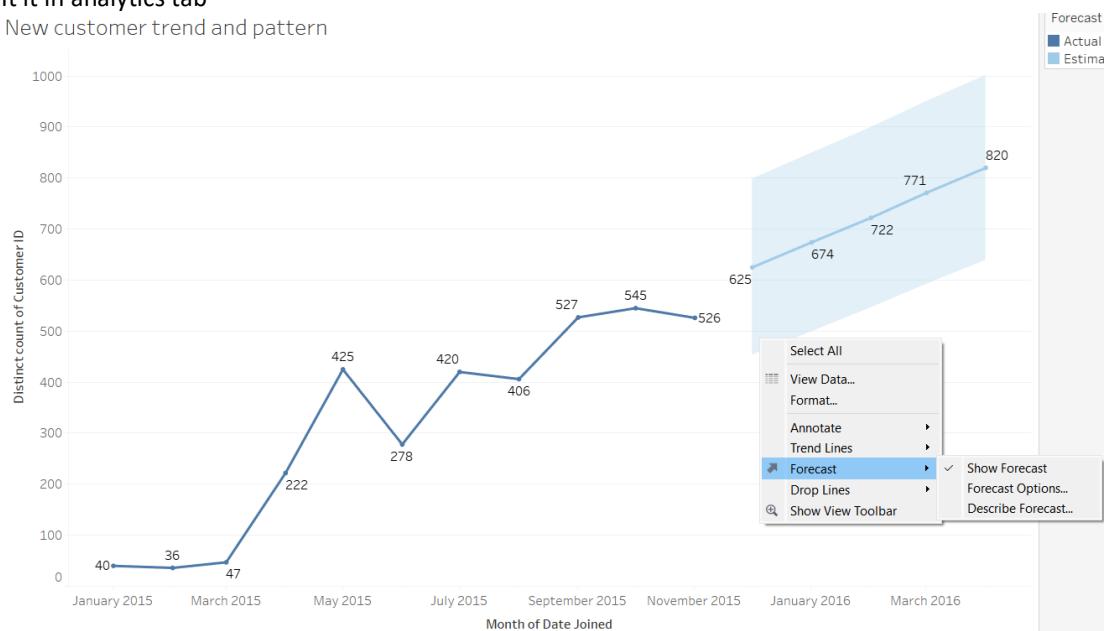
>> press control drag customer id put it to the labels



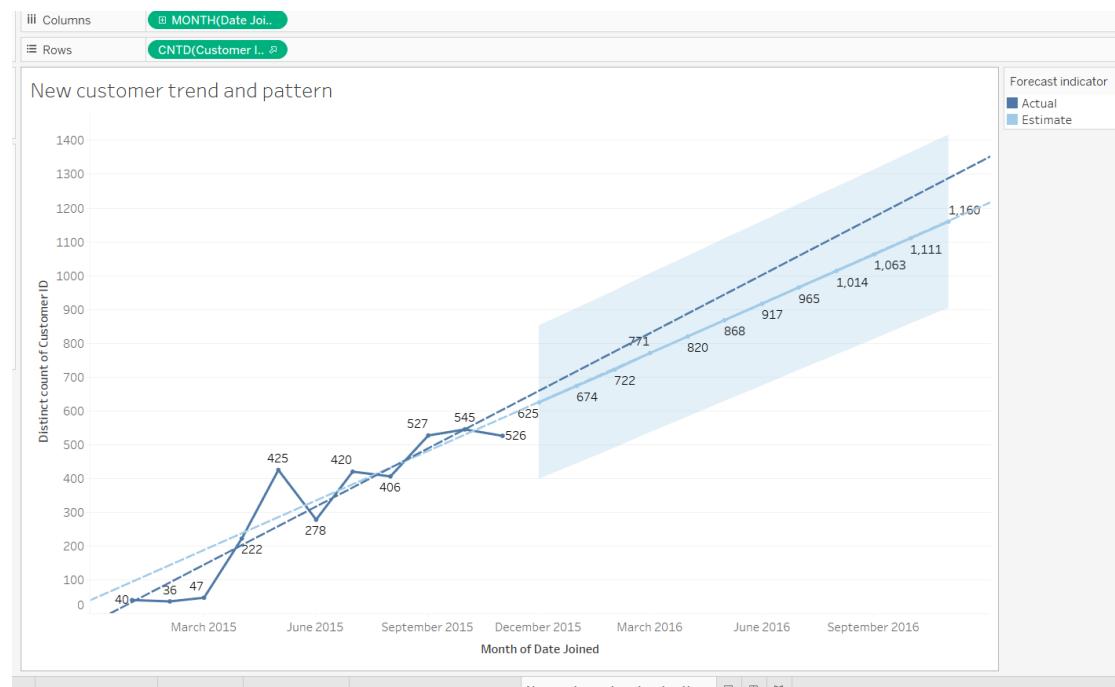
>> Now we do the forecast > Drag the forecast > Add

It it in analytics tab

New customer trend and pattern



>> Drag and drop trend line > linear



>> Top five customers mainaining the high balances

>> create new sheet ..rename Top Five customers

>> Drag and Drop name and surname to column

iii Columns Rows

Name	Surname
Abigail	Abraham
	Abc
Allan	
Blake	Abc
Buckland	Abc

>> Swap it

>> It doesn't look good so remove this ..

>> Create one calculated column

Full Name

[Name] + " " + [Surname]

The calculation is valid.

Apply OK

>> Now drag the full name.

iii Columns Full Name

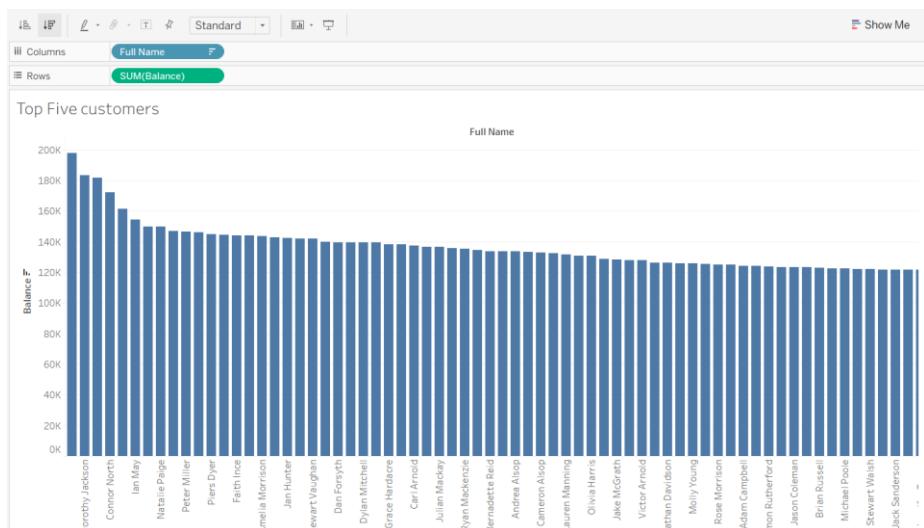
Rows

Top Five customers

Drag dimensions or measures here or double-click to start a new calculation.

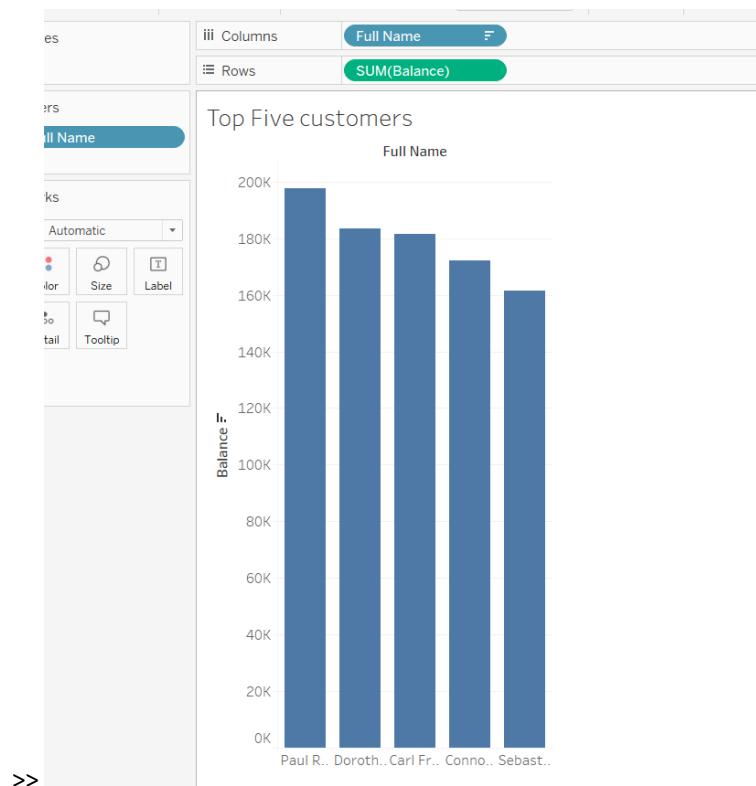
| Abiga.. |
|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Abc |
| | | | | | | | | | |

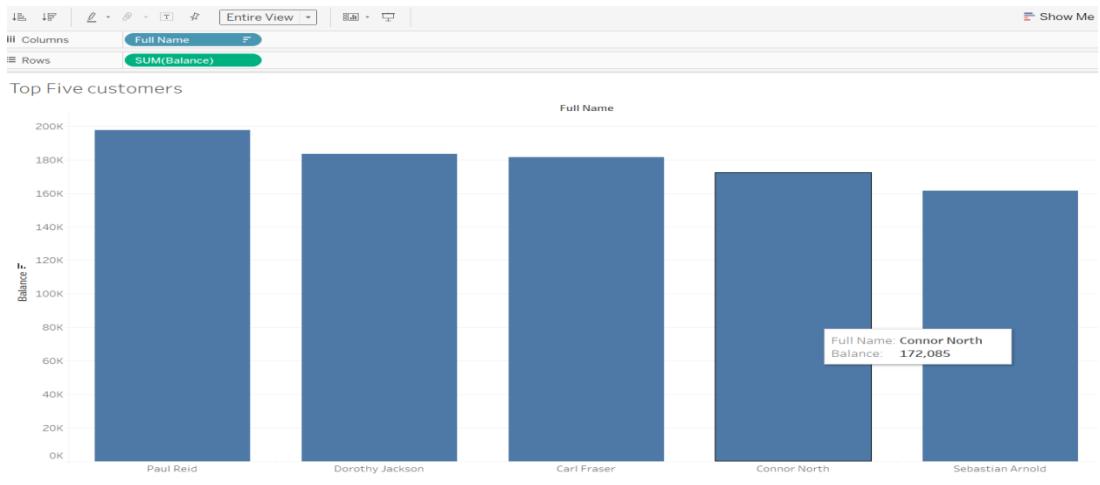
>> drag and drop balance > put it in descending order



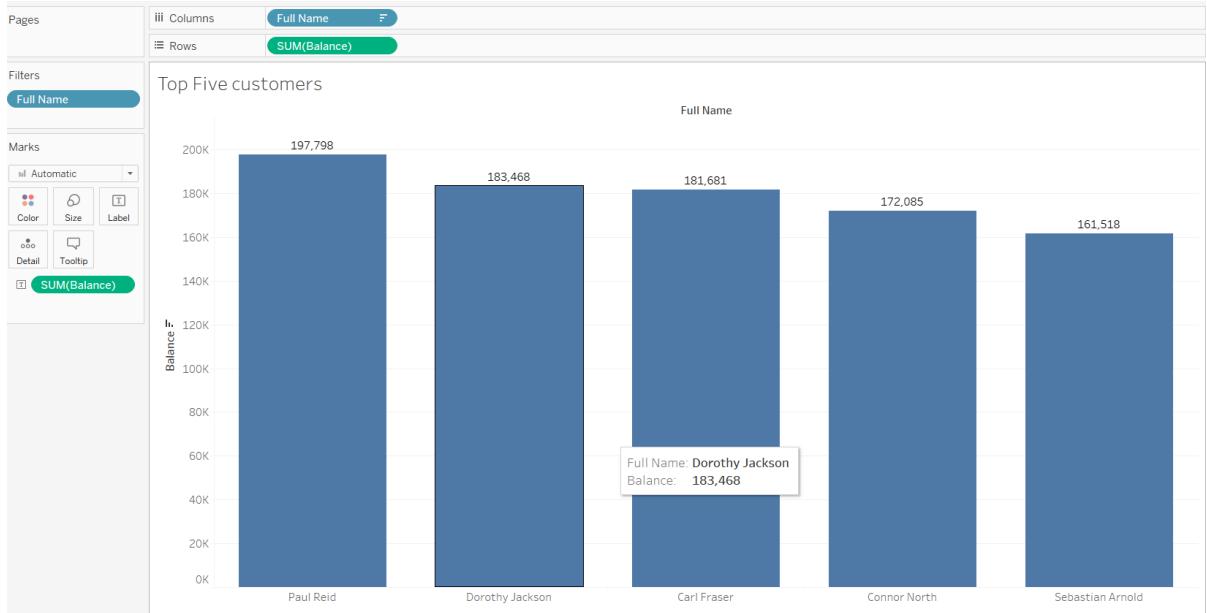
>> take full name drop it to filter

The screenshot shows the Tableau Data Filter dialog box. The 'By field' tab is selected, showing 'Top' set to 5, 'by' 'Balance' (Sum). The 'General' tab is also visible.

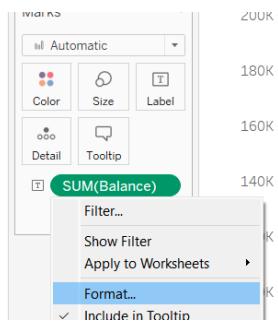


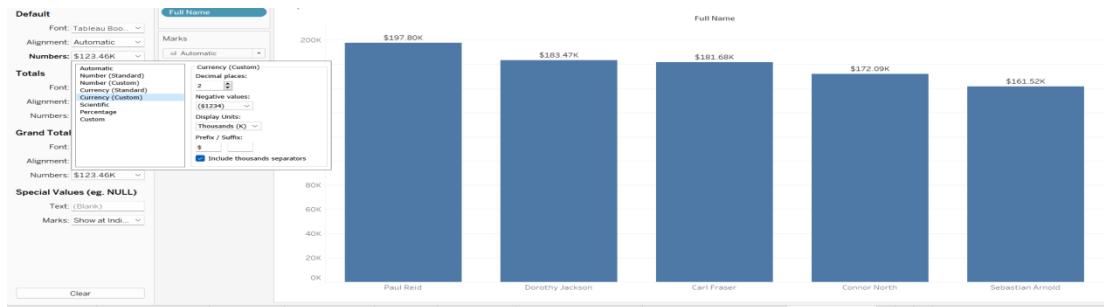


>> control + balance drop it to filter

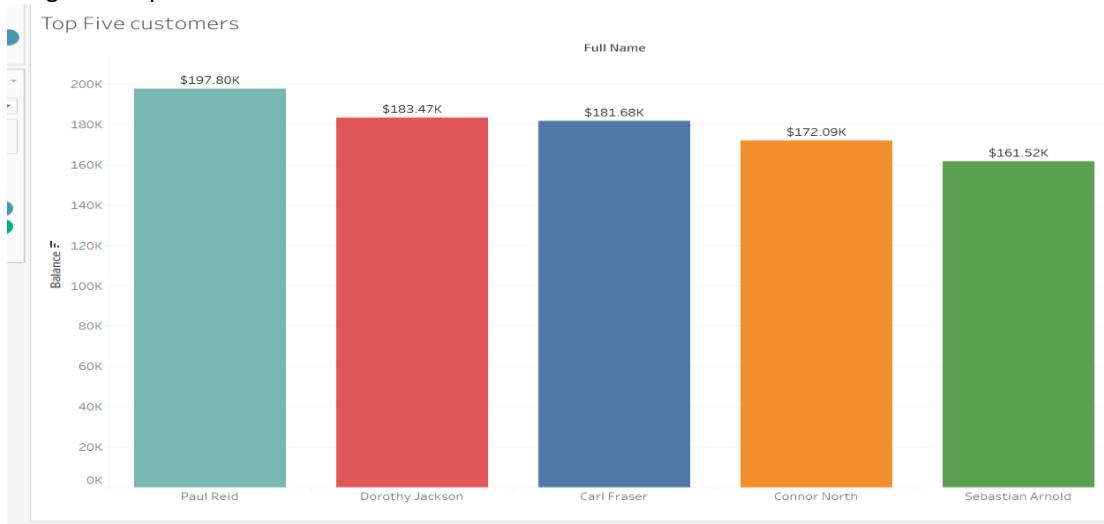


Format > go to number >

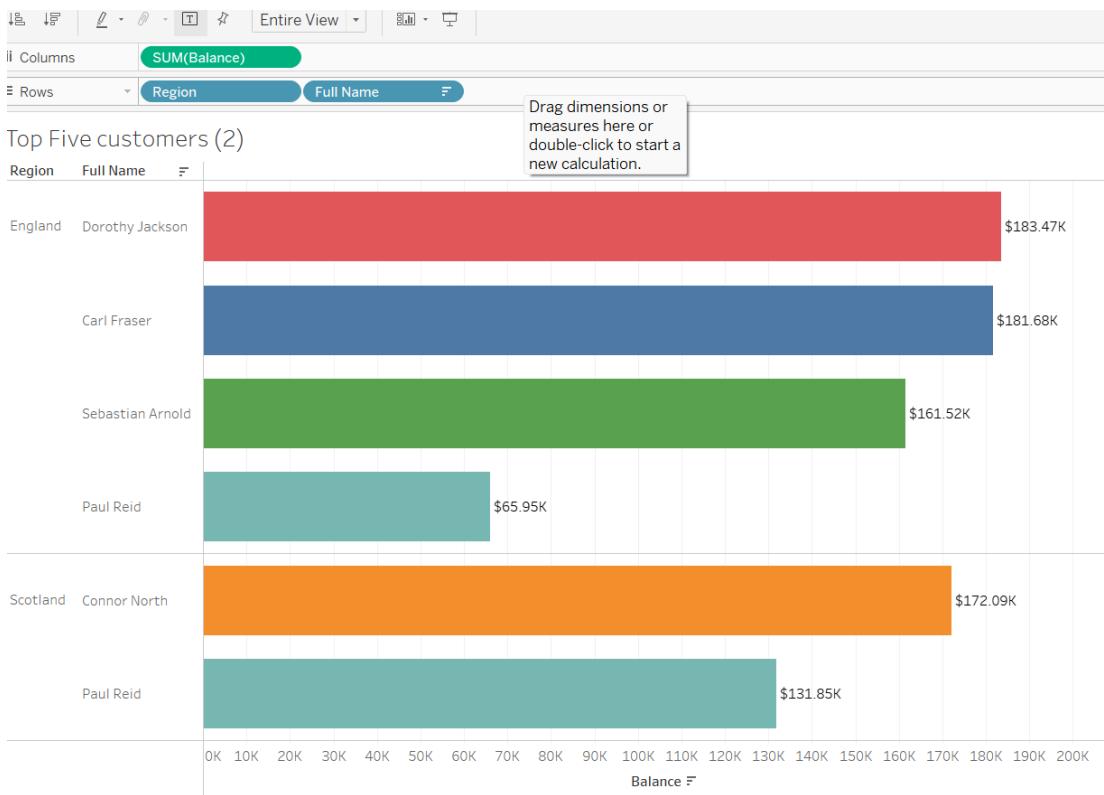


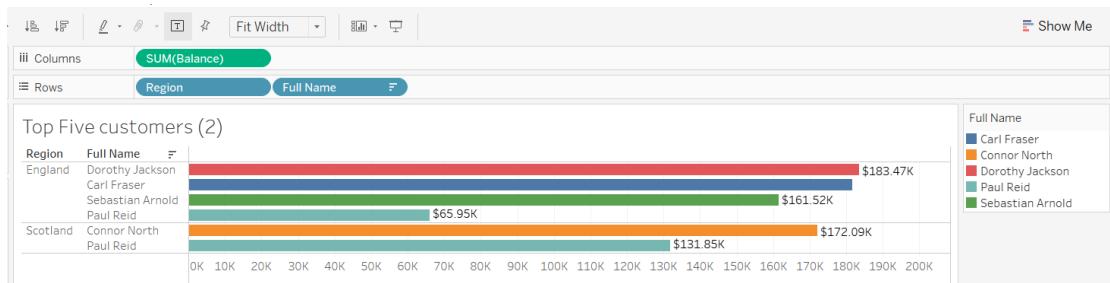


>>> If I want a different color for the balance ..
Drag and drop full name to color



>> Top 5 customer in each reason .. > Create a duplicate of this one ..>> put the reason before full name in column and swap it





It is not showing the correct one. Remove the full name ...

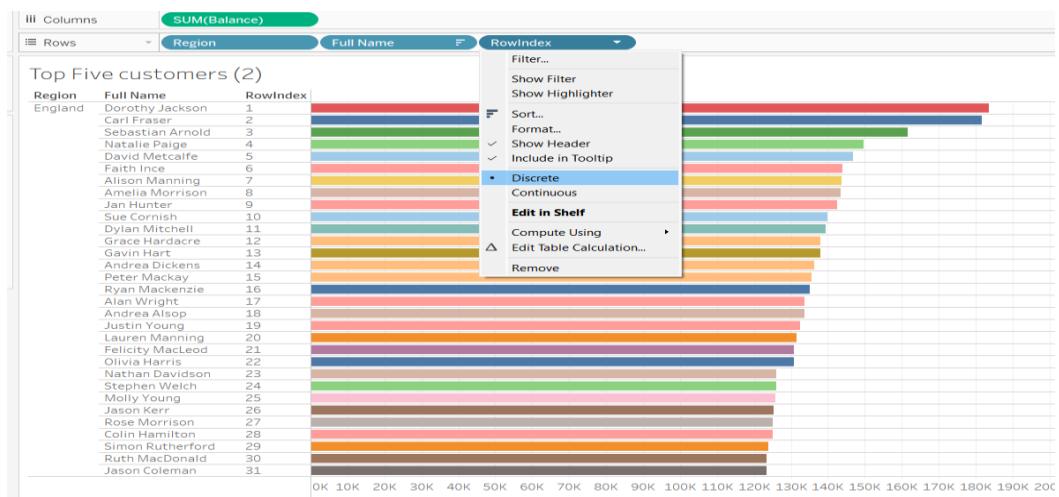
>> Create a calculative field



Drag and drop Rowindex



Click > discrete



>> click > edit table calculation

The screenshot shows a Tableau interface with a list of customers. The columns are 'Full Name' and 'RowIndex'. The 'RowIndex' column has a context menu open, with 'Edit Table Calculation...' highlighted.

	Full Name	RowIndex
1	Dorothy Jackson	1
2	Carl Fraser	2
3	Sebastian Arnold	3
4	Natalie Paige	4
5	David Metcalfe	5
6	Faith Ince	6
7	Alison Manning	7
8	Amelia Morrison	8
9	Jan Hunter	9
10	Sue Cornish	10
11	Dylan Mitchell	11
12	Grace Hardacre	12
13	Gavin Hart	13
14	Andrea Dickens	14
15	Peter Mackay	15
16	Ryan Mackenzie	16

The screenshot shows the 'Table Calculation' dialog box for the 'RowIndex' field. It is set to 'Compute Using' 'Table (down)' and includes specific dimensions for 'Region' and 'Full Name'. The 'At the level' dropdown is set to 'Deepest'.

Table Calculation
RowIndex

Compute Using

Table (down)
Pane (down)
Pane (across then down)
Pane (down then across)
Cell

Specific Dimensions

Region
Full Name

At the level Deepest

Restarting every Region

Sort order Specific Dimens...

Show calculation assistance

>>

>> Put back "RowIndex" to filter from rows.. select 1,2,3 press ok

The screenshot shows the 'Filter [RowIndex]' dialog box. It is set to 'Select from list' and has checkboxes for values 1, 2, and 3 selected. The 'OK' button is highlighted.

Filter [RowIndex]

General

Select from list Custom value list Use all

Enter search text

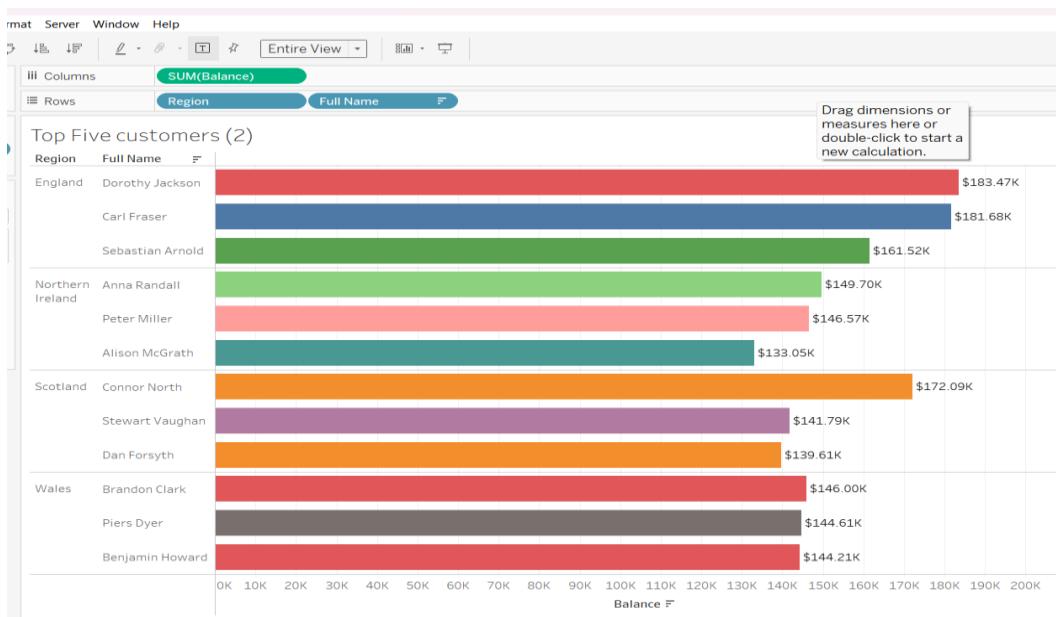
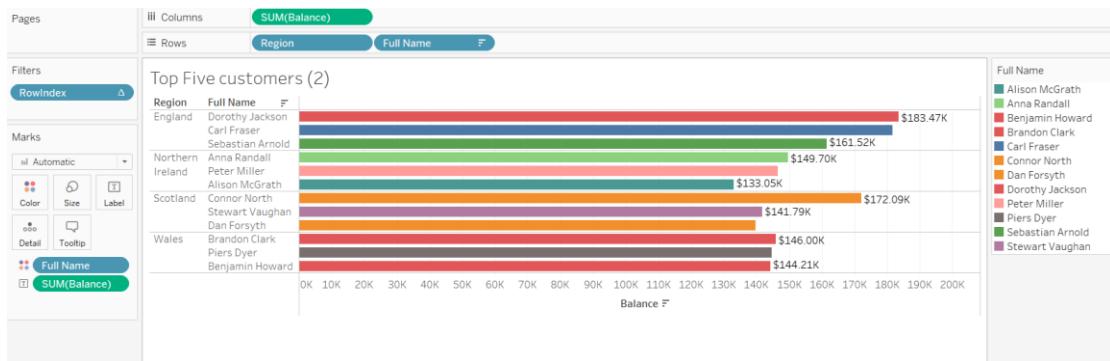
1
2
3
4
5
6
7
8
9
10
11

All None Exclude

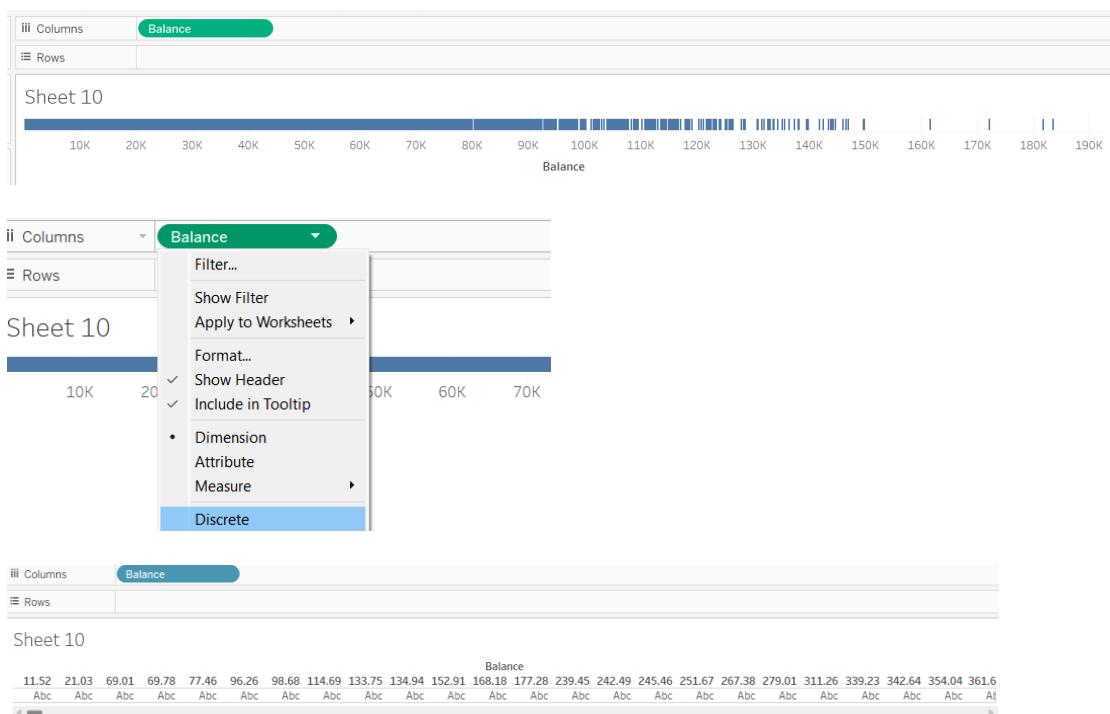
Summary

Field: [RowIndex]
Selection: Selected 3 of 2159 values
Wildcard: All
Condition: None
Limit: None

Reset OK Cancel Apply

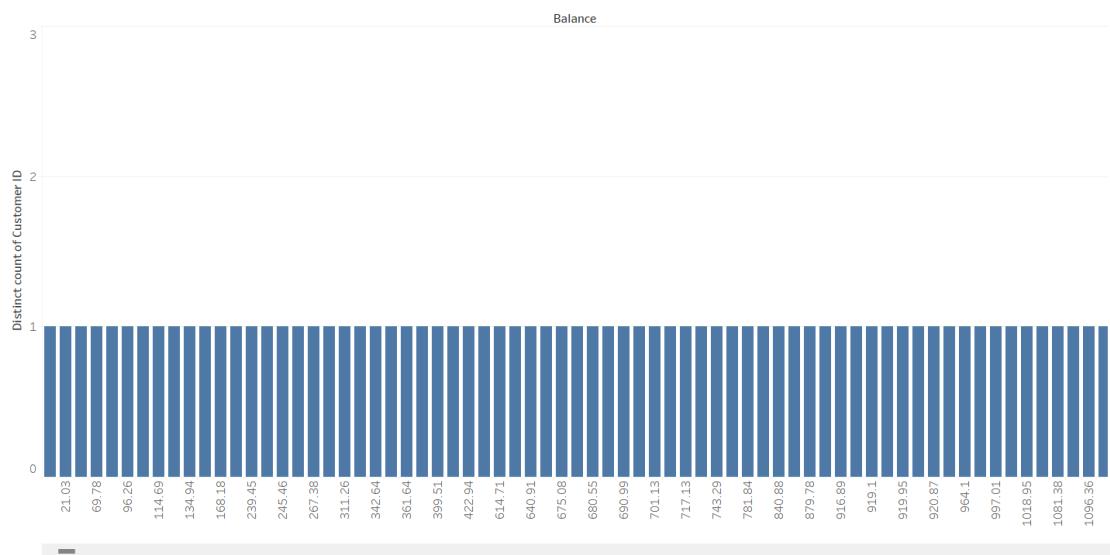


>>> Take a new sheet

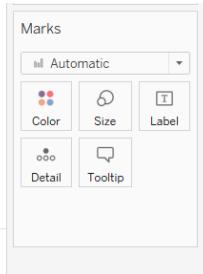
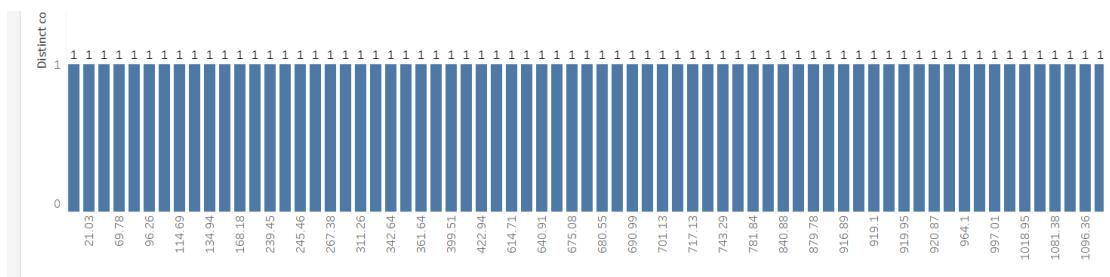


>> Put customerid to rows .> Select >Distinct

Sheet 10

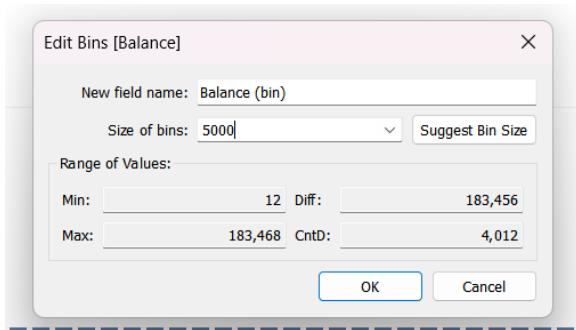


>> control + drag customer id to label

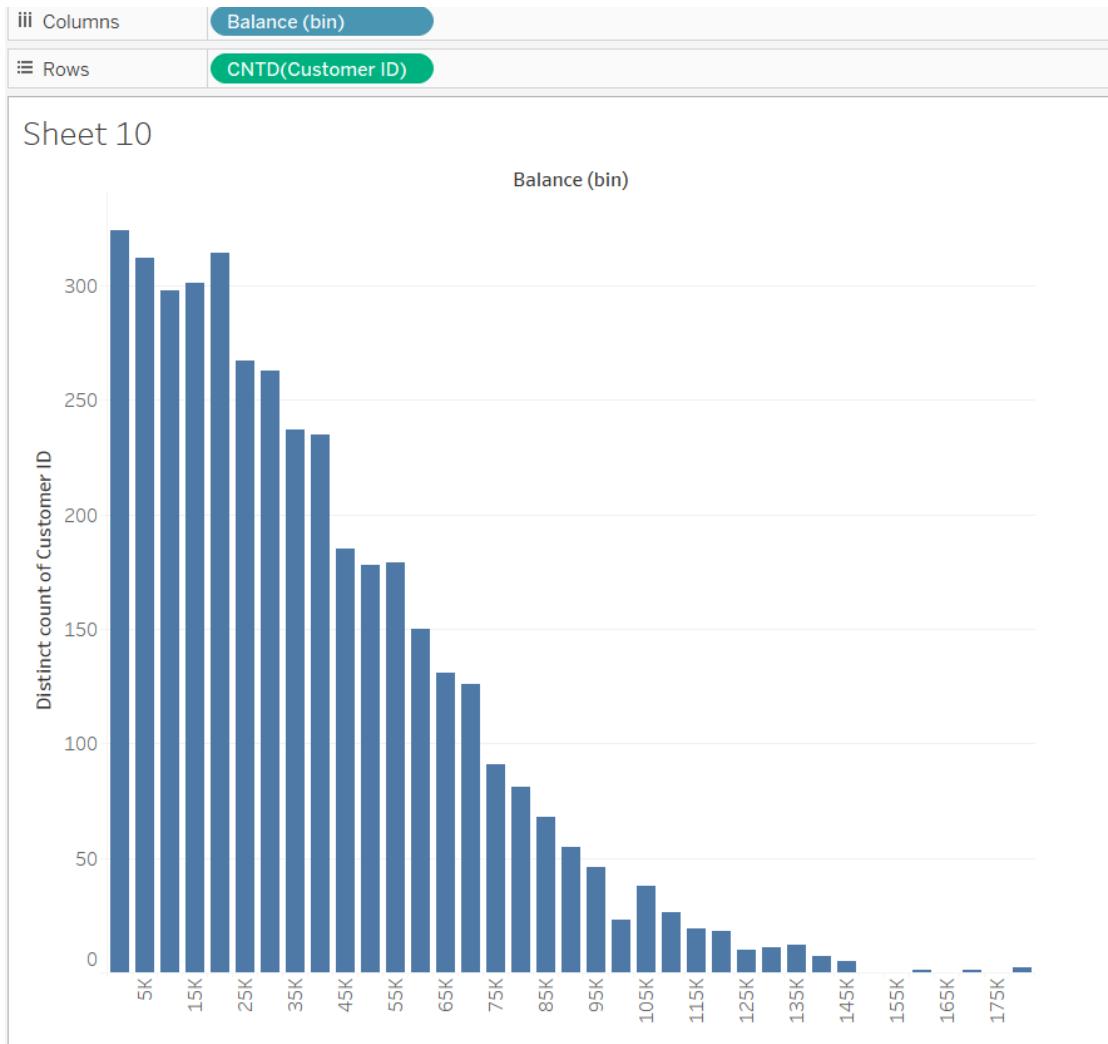


>> take out customer id from here:

A screenshot of the Tableau context menu for the 'Balance' field. The 'Bins...' option is highlighted with a blue selection bar. Other options include 'Add to Sheet', 'Show Filter', 'Duplicate', 'Rename', 'Hide', 'Create' (with sub-options 'Calculated Field...', 'Group...', 'Bins...', 'Parameter...'), 'Convert to Discrete', 'Convert to Dimension', and 'Change Data Type'. The 'Bins...' option is also highlighted in the 'Create' submenu.



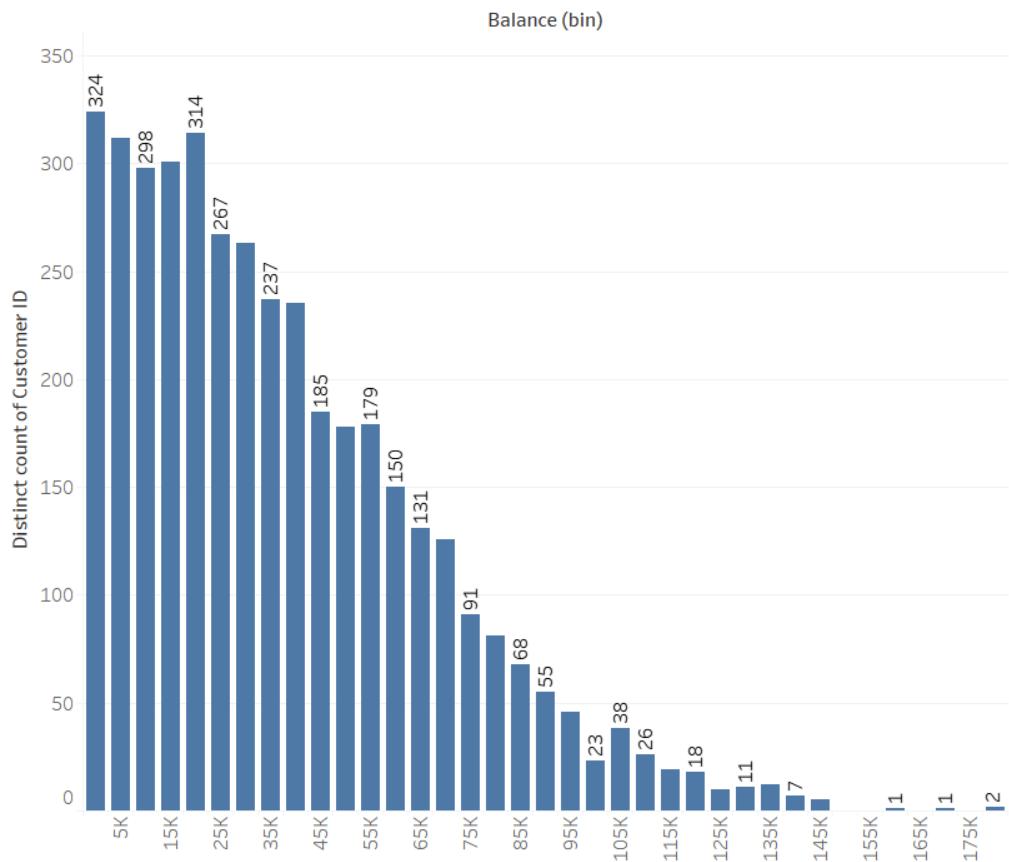
>> Drag and drop on the top of balance.



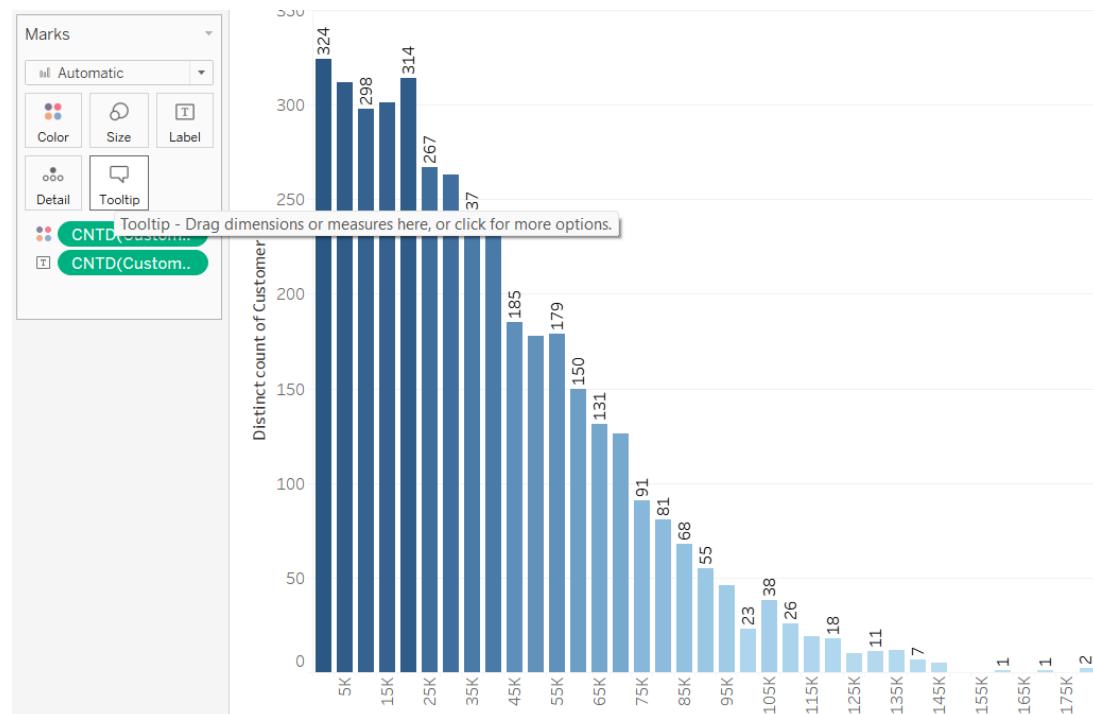
>> control + drag and drop customer id into label

iii Columns	Balance (bin)
iii Rows	CNTD(Customer ID)

Sheet 10



>> control + drag and drop customerId into colors

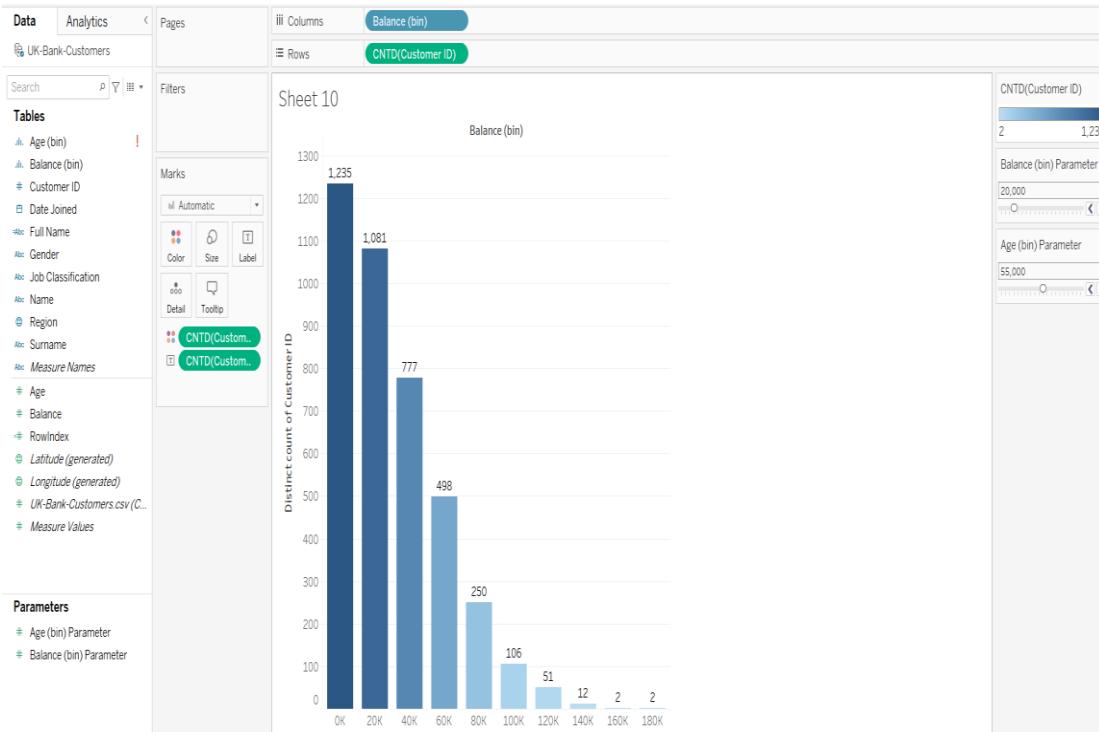
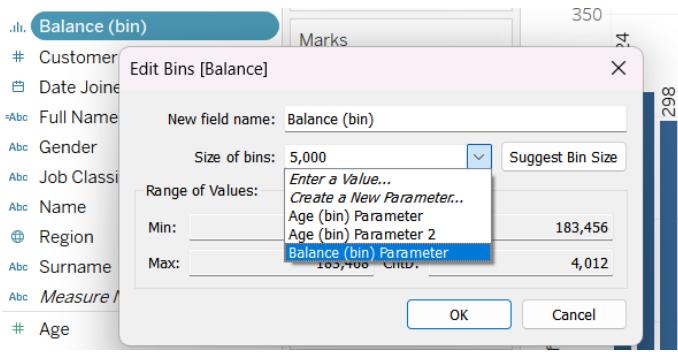


>>> Age (bin) > Create > Parameter

The screenshot shows a data visualization interface with a sidebar containing tables and measures. A context menu is open over the 'Age (bin)' item in the 'Tables' section. The menu includes options like 'Add to Sheet', 'Cut', 'Copy', 'Edit...', 'Duplicate', 'Rename', 'Hide', 'Delete', 'Aliases...', 'Create', 'Transform', and 'Convert to Continuous'. The 'Create' option is highlighted. A bar chart is visible in the background.

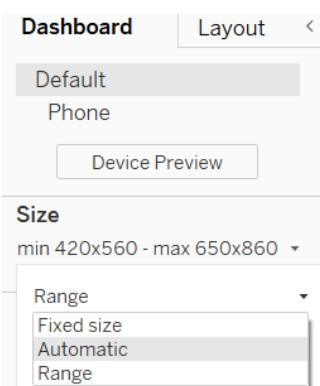
The screenshot shows a data visualization interface with a sidebar containing tables and measures. A context menu is open over the 'Balance (bin)' item in the 'Tables' section. The menu includes options like 'Add to Sheet', 'Cut', 'Copy', 'Edit...', 'Duplicate', 'Rename', 'Hide', 'Delete', 'Aliases...', 'Create', 'Transform', and 'Convert to Continuous'. The 'Create' option is highlighted. A bar chart is visible in the background.

The screenshot shows the 'Create Parameter' dialog box. It has fields for 'Name' (set to 'Balance (bin) Parameter'), 'Properties' (Data type: Integer, Display format: 5.000), 'Current value' (5.000), 'Value when workbook opens' (Current value), 'Allowable values' (Range selected), 'Range of values' (Minimum: 5.000, Fixed selected; Maximum: 100.000, When workbook opens selected; Step size: 5.000). At the bottom are 'Cancel' and 'OK' buttons.



>> Create Dashboard >>

Click on Dashboard > then change size



Take vertical > drop it inside Big white space > under vertical putting text box

>> Write text > Go to layout > select background

Dashboard **Layout**

Selected item
Vertical Container

Show title
 Floating
 Control visibility using value

Position
 x: 8 y: 8

Size
 w: 1,641 h: 835

Border
 None

Background
 None

Color: None

Color palette:



More colors...

>> Got to dashboard > click floating

Dashboard **Layout**

Default
Phone

Device Preview

Size
Automatic

Sheets

- Customer in ...
- Age distribution...
- Gender Ratio ...
- Job calcificati...
- New customer...
- Top Five ...
- Top Five ...

Objects

- Horizontal Container
- Vertical Container
- Text
- Extension
- Data Story
- Image
- Blank

Tiled **Floating**

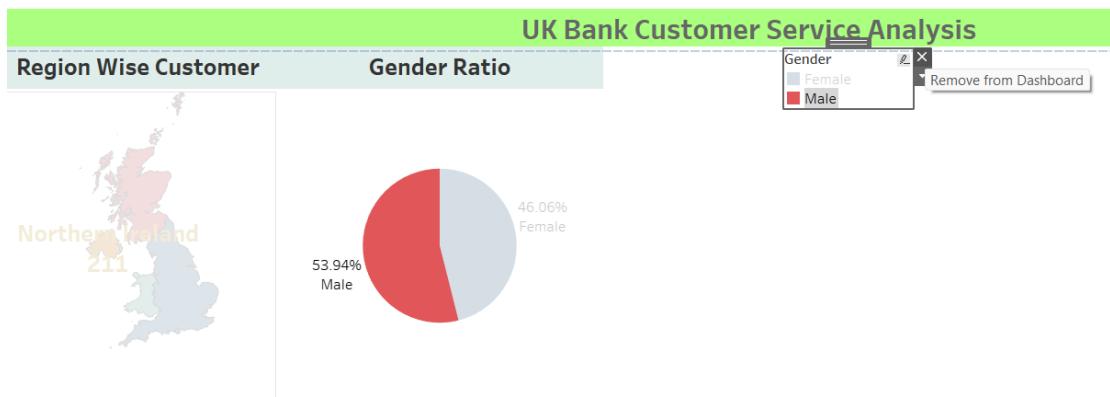
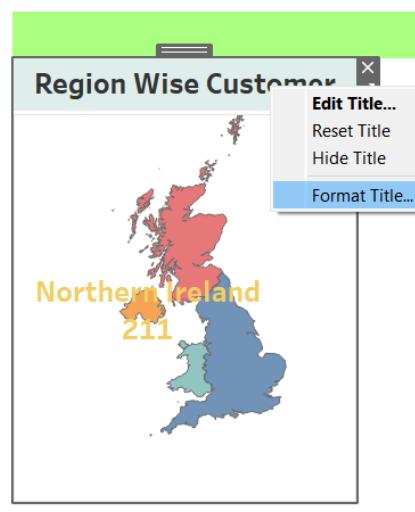
UK Bank Customer Service Analysis

Customer in each reason



Region

- England
- Northern Ireland
- Scotland
- Wales



>> To change the background color or gender ratio > go to format > fill

Format Shading

A Fields

Format Shading

Sheet Rows Columns

Default

Worksheet:

None	Black	White	Light Gray	Dark Gray	Light Blue	Dark Blue	Light Green	Dark Green	Light Red	Dark Red	Light Orange	Dark Orange	Light Purple	Dark Purple	Light Yellow	Dark Yellow
------	-------	-------	------------	-----------	------------	-----------	-------------	------------	-----------	----------	--------------	-------------	--------------	-------------	--------------	-------------

Header:

Black	White	Light Gray	Dark Gray	Light Blue	Dark Blue	Light Green	Dark Green	Light Red	Dark Red	Light Orange	Dark Orange	Light Purple	Dark Purple	Light Yellow	Dark Yellow
-------	-------	------------	-----------	------------	-----------	-------------	------------	-----------	----------	--------------	-------------	--------------	-------------	--------------	-------------

Total

Pane:

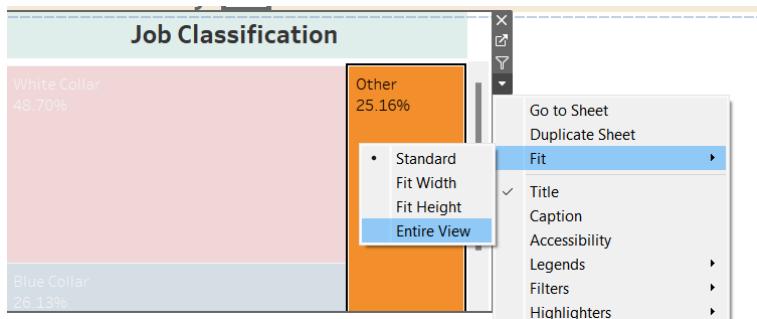
Black	White	Light Gray	Dark Gray	Light Blue	Dark Blue	Light Green	Dark Green	Light Red	Dark Red	Light Orange	Dark Orange	Light Purple	Dark Purple	Light Yellow	Dark Yellow
-------	-------	------------	-----------	------------	-----------	-------------	------------	-----------	----------	--------------	-------------	--------------	-------------	--------------	-------------

Header:

Blue	Green	Red	Yellow	Cyan	Magenta	Dark Blue	Dark Green	Dark Red	Dark Yellow	Dark Cyan	Dark Magenta	Light Blue	Light Green	Light Red	Light Yellow
------	-------	-----	--------	------	---------	-----------	------------	----------	-------------	-----------	--------------	------------	-------------	-----------	--------------

More colors...

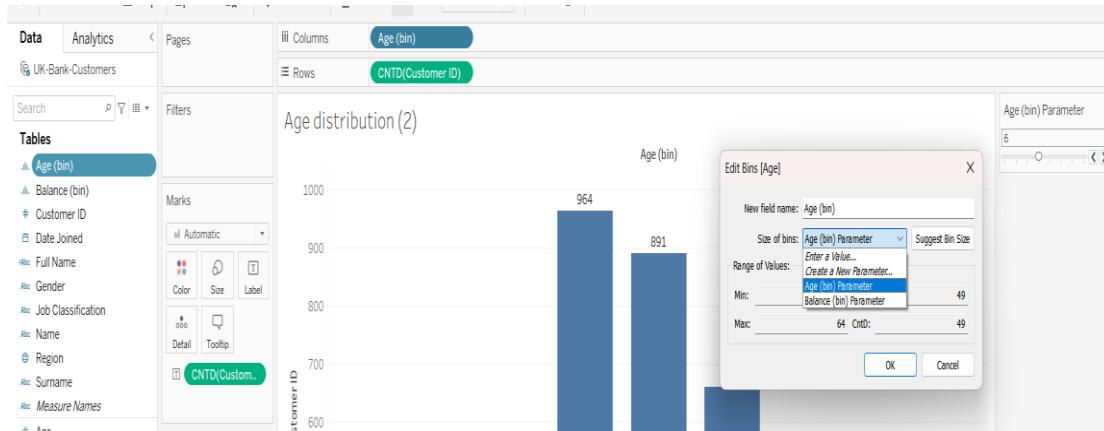
>> To make it fit > entire view



.....Extra -----Note----for fixing age parameter page -----

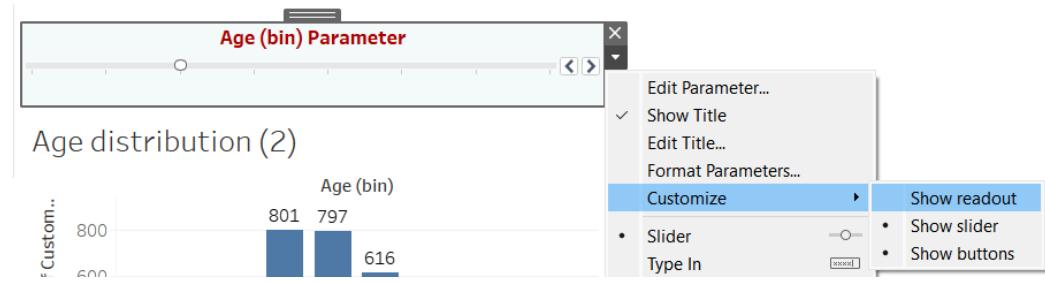
Note :::

Note:

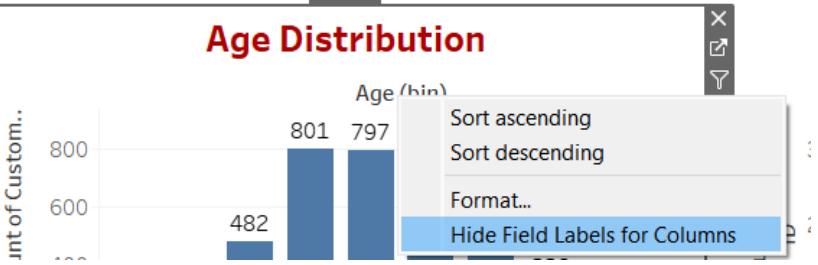


>>>

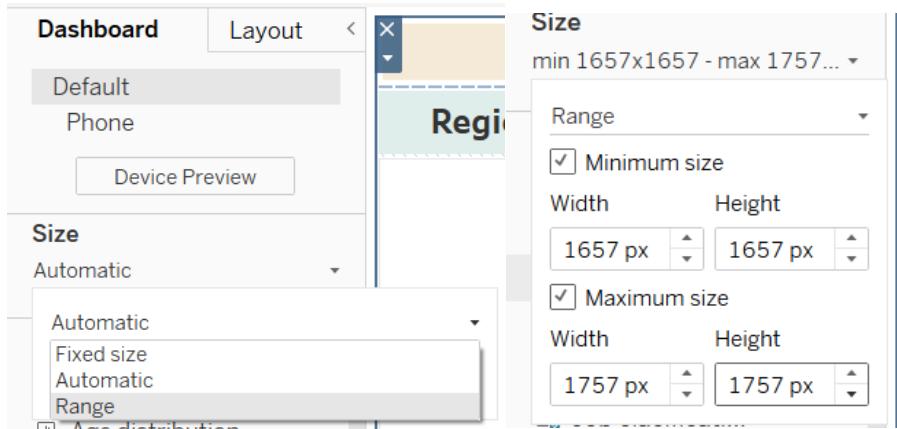
Take out this >>>



>> For Hiding field label when I dashboard ..



> for increasing the size of dashboard



>> Now adjust the dashboard content

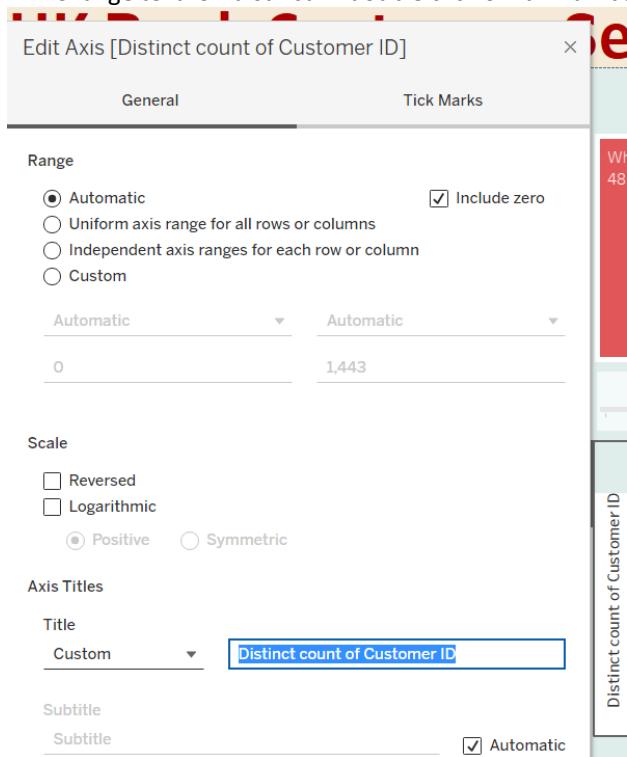
>> Lets do the background change of the dashboard..

> Format >Dashboard > Change the background

>> Let's do the boarder of heading

>> select the heading > go layout > change boarder

>>> Change text for distinct ... double click on it > number of customer like below >



>>> Now we will link up with the map

>> Go to Dashboard > Action > Add Action > filter

The screenshot shows a Tableau dashboard with a map of the United Kingdom. The map highlights Scotland with a yellow box and Northern Ireland with a red box. Overlays on the map show values: 'Scotland' with '1,12' and 'Northern Ireland' with '211'. Below the map, there's a section titled 'Actions' with the sub-section 'Actions let you create interactive relationships with the web.' A radio button 'This workbook' is selected. The 'Run On' dropdown is set to 'Highlight 1 (general) Select'. The 'Source Sheets' dropdown is set to 'Dashboard 1'. Under 'Run action on', the 'Menu' option is selected. In the 'Target Sheets' dropdown, 'Dashboard 1' is also selected. Under 'Clearing the selection will', 'Keep filtered values' is selected. The 'Filter' section has 'All fields' selected. A table below shows a single row with 'Source Field' 'Click to add', 'Target Data Source' empty, and 'Target Field' empty. At the bottom right of the dialog are 'Cancel' and 'OK' buttons.

>> Source Sheet > dissect all first > then select > customer in each region > select (select) > click OK

Now if u go to map and click each region the data inside dashboard will change

>> So we need to convert it to story for presentation

> We can create a story

Go story menu > new story

The screenshot shows the 'Story' menu interface. The top bar includes 'Story', 'Analysis', 'Format', 'Server', 'Window', and 'Help'. Below the menu is a toolbar with various icons. The main area is titled 'Story 1' and contains a large dashed rectangular frame with the placeholder text 'Drag a sheet here'. To the left of the frame, there's a vertical list of items: 'Duplicate', 'Story 1', 'Pattern', 'Each ...', and '2).'. To the right of the frame, there's a 'Caption' field with the placeholder 'Add a caption' and a 'Cancel' button at the bottom right.

>> Change the size range of story



>> Drag and drop the dashboard inside story

The screenshot shows 'Story 1' with a sidebar containing a list of items such as 'Age distribution', 'Customer in each reason', 'Gender Ratio', etc. The main area displays a dashboard titled 'UK Bank Customer Service Analysis'. The dashboard includes four panels: 'Region Wise Customer' (map of UK with counts for Scotland, Northern Ireland, and England), 'Gender Ratio' (two pie charts for Male and Female), 'Age Distribution' (bar chart for Age 30), and 'Job Classification' (bar chart for White Collar). A tooltip at the bottom right of the dashboard states: 'In English customer are dominated by white color jobs. Near about 70%'.

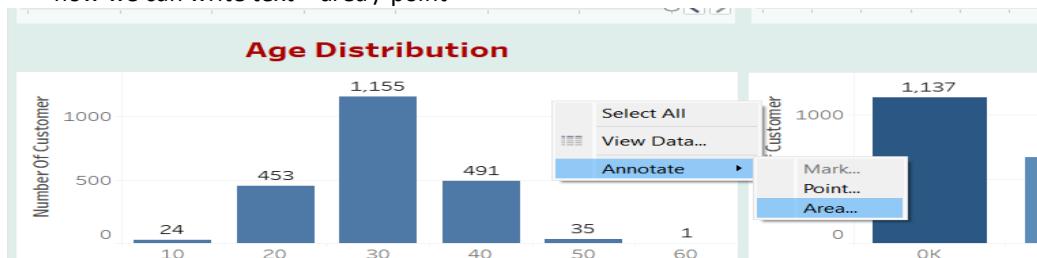
>> So I want to create a story based on England so I click England.

The screenshot shows the 'Format Story' dialog with the 'Format' tab selected. It includes sections for 'Shading' (Default: light blue), 'Title' (Font: Tableau Regular, 24pt), and 'Navigator' (Font: Tableau Bold, 16pt). A tooltip at the bottom right of the dialog states: 'In English customer are dominated by white color jobs. Near about 70%'.

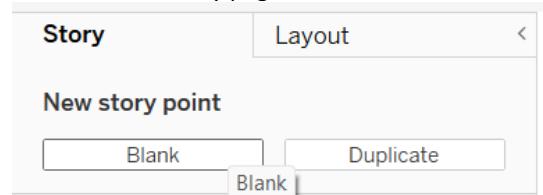
>> change color, background , font

The screenshot shows 'Story 1' with the same dashboard as before, but with modified colors. The background of the dashboard panels is now red, and the text color is white. The sidebar and the 'Format Story' dialog also reflect these changes, with red backgrounds and white text.

>>> now we can write text > area / point



>>for another story page ?



> drag the and drop dashboard now select > scotland and

Case Study -01

File Data WINDOW Help

Connections Add
SEC2-1000-Startups Microsoft Excel

Sheets
 Use Data Interpreter
 Data Interpreter might be able to clean your Microsoft Excel workbook.
 Financials Overview
 New Union New Table Extension

Overview+ (SEC2-1000-Startups)

Overview is made of 2 tables.

Overview Financials

Filters 0 | Add

Overview 22 fields 1 rows 1 rows

Name	Overview	Abc Overview	Abc Overview	# Overview	# Overview	Overview Employees	Overview State	Overview City	Abc Overview
Industry	Name	Industry	Description	Year Founded	Employees	Overview	State	City	Metro Area
All Possible	IT Services	A hardware, software, and vid...	2011	24	CA	Los Angeles	Los Angeles	Los Angeles	Los Angeles

Fields

Number (decimal)
 Number (whole)
 Date & Time
 Date
 String
 Boolean
 Default
 Geographic Role

Search Filters

Tables

- Financials
 - # ID (Financials)
 - Abc Name (Financials)
- Overview
 - Abc Description
 - + ID
 - Abc Industry

Add to Sheet Duplicate Rename Hide

Marks

Add to Sheet Duplicate Rename Hide Text

Name (Financials)

Overview

Description

ID

Industry

Data Analytics

Overview+ (SEC2-1000-...)

Search Create Calculated Field... Create Parameter... Group by Folder

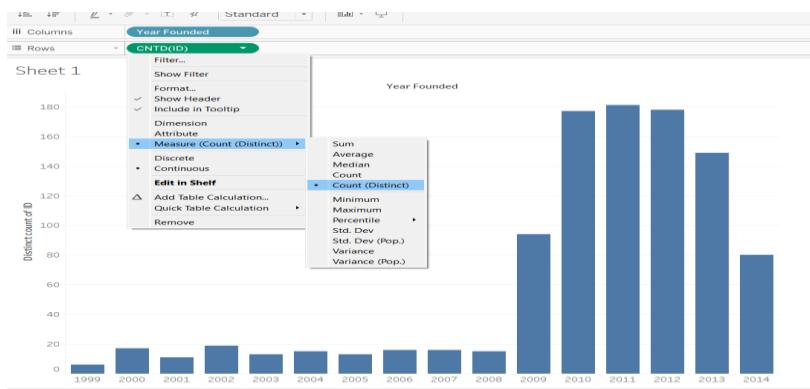
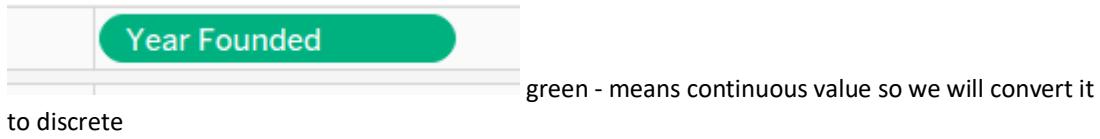
> For putting all the files in a folder > create a folder then > Drag and drop the files inside the folder

The screenshot shows the Tableau interface with a context menu open over a list of measures. The menu path 'Folders' -> 'Create Folder...' is highlighted. A 'Create Folder' dialog box is open, showing the folder name '2013' entered in the 'Name:' field. The folder '2013' is then shown in the 'Folders' pane, containing the measures: # 2013 Expenses, # 2013 Profit, and # 2013 Revenue.

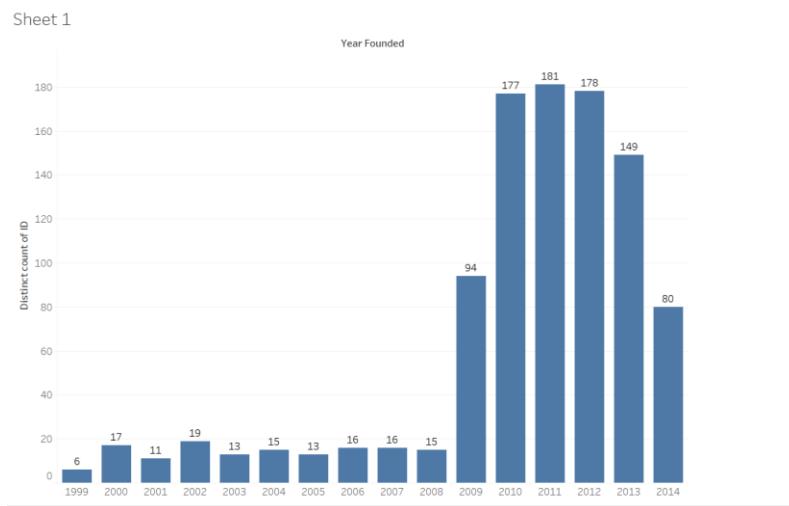
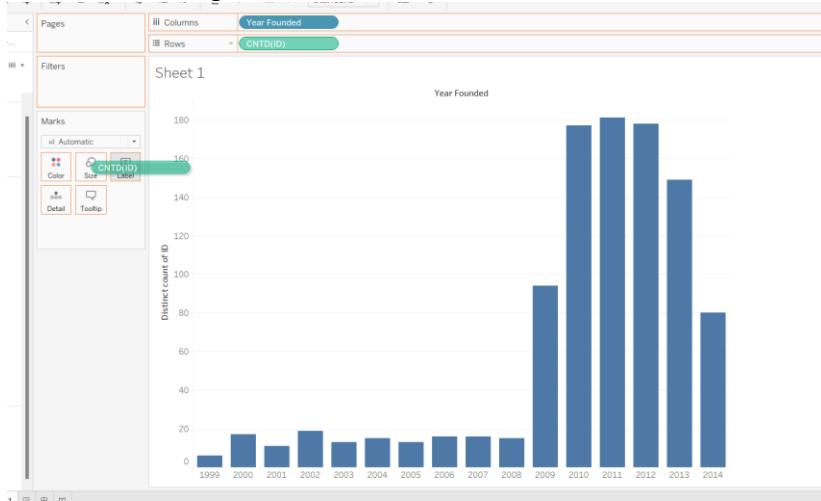
Folders

- 2013
 - # 2013 Expenses
 - # 2013 Profit
 - # 2013 Revenue
- 2014
 - # 2014 Expenses
 - # 2014 Growth %
 - # 2014 Profit
 - # 2014 Revenue
- 2015
 - # 2015 Expenses
 - # 2015 Growth %
 - # 2015 Profit
 - # 2015 Revenue

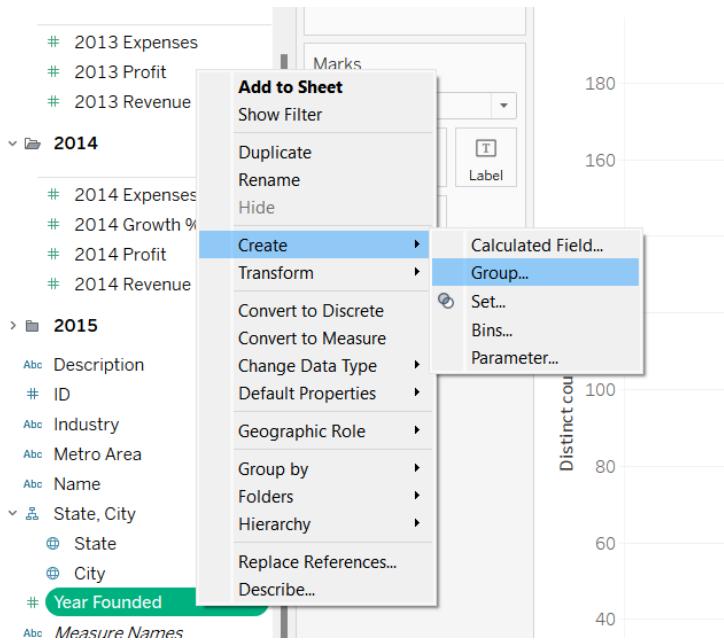
>>> WE will look for in which year how many start up company created ...

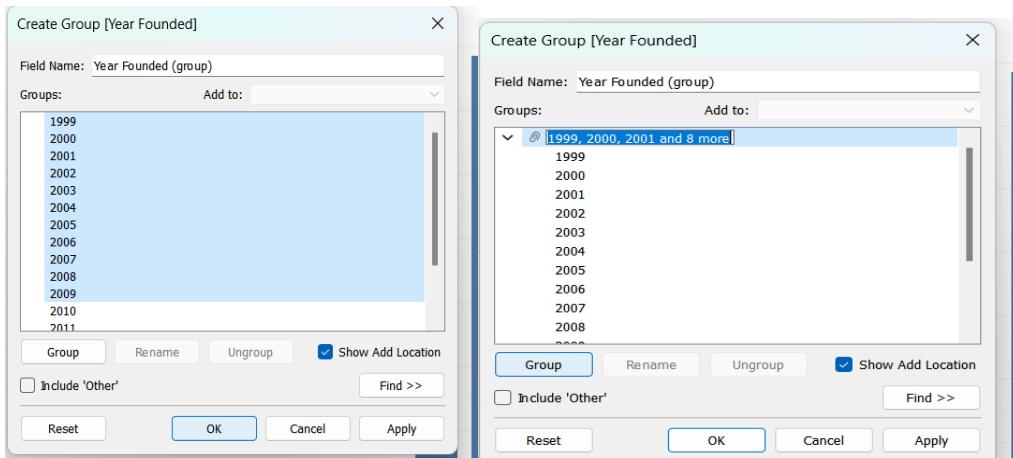


Press control + drag to label

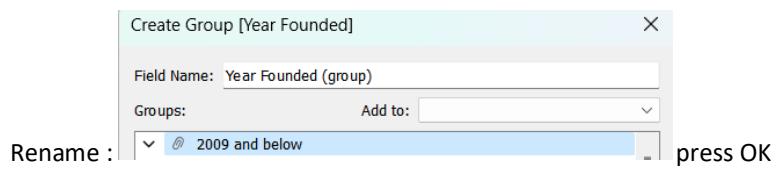


>> Creating a group ----- We can create 1999 to 2008 to one group





Press > group



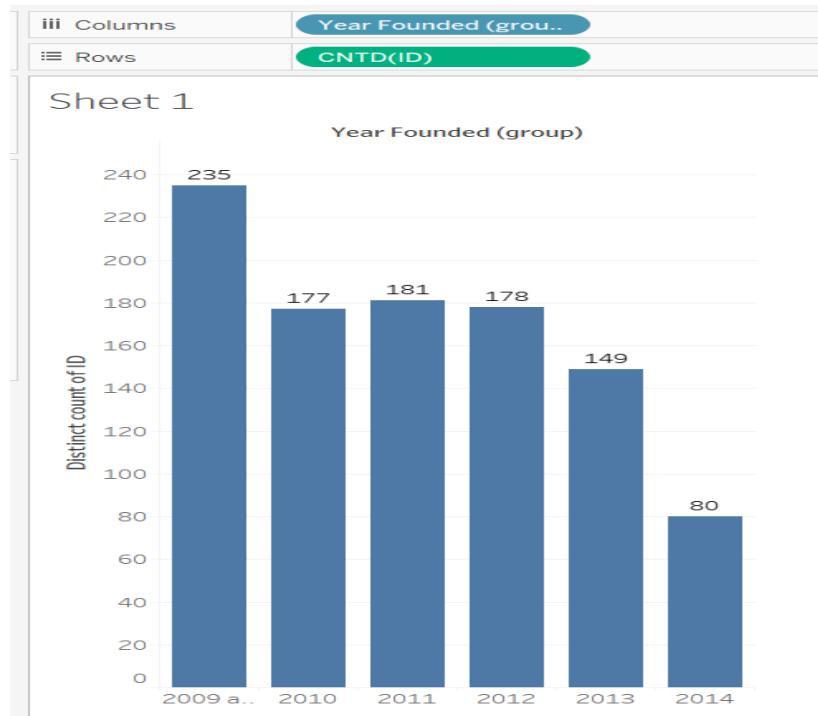
press OK

Year Founded

@ Year Founded (group)

so this created to the left

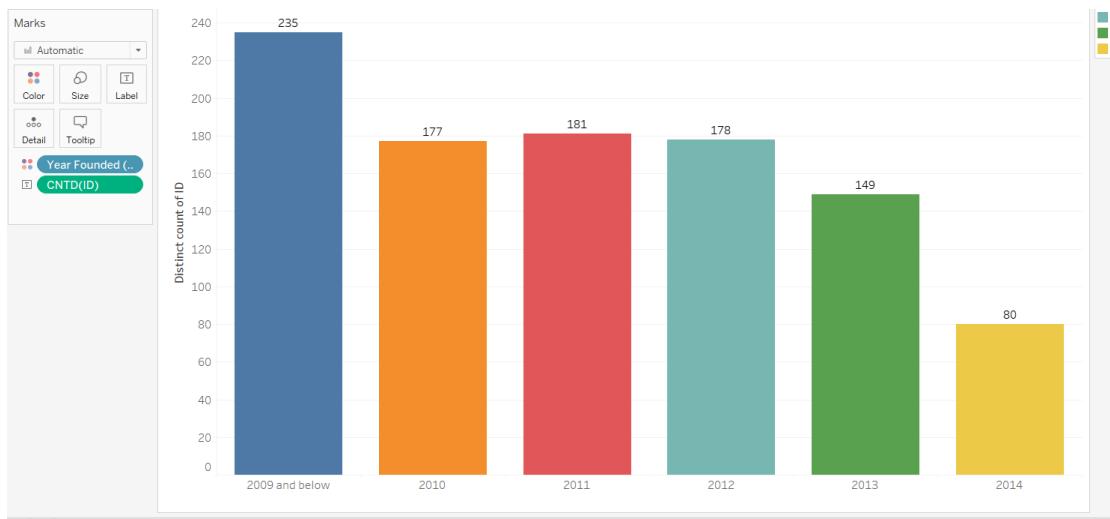
>> So remove year founded from the column and drag and drop year founded group to the same place



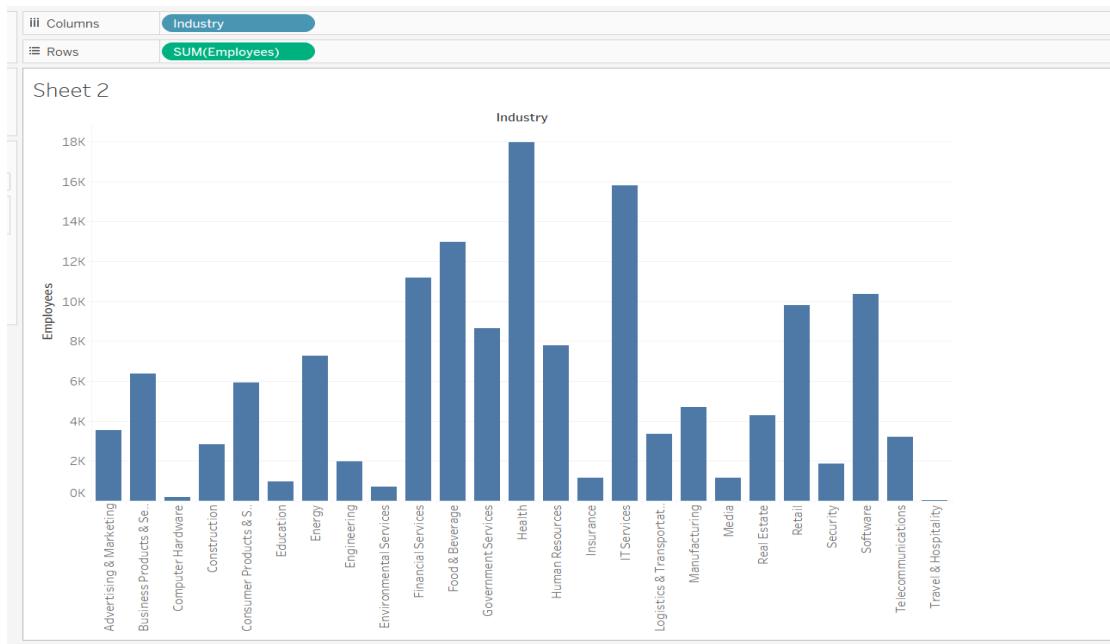
>> Put year founded to the color



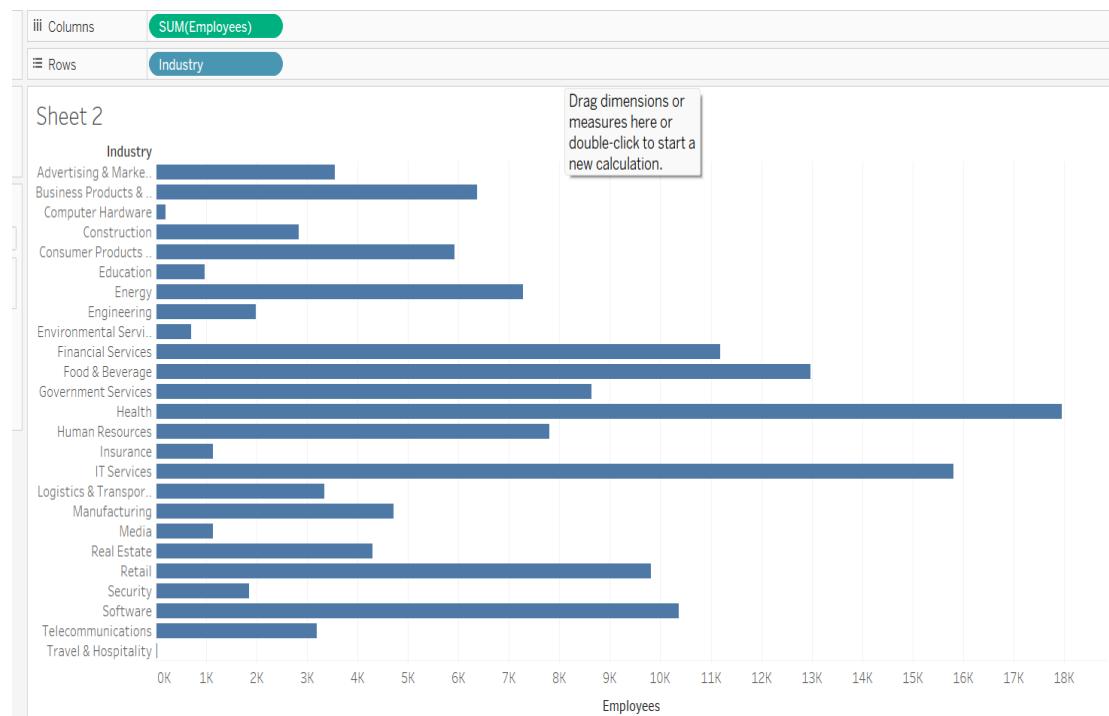
>> Now if u take out year founded and put year founded group(from color) shows like below



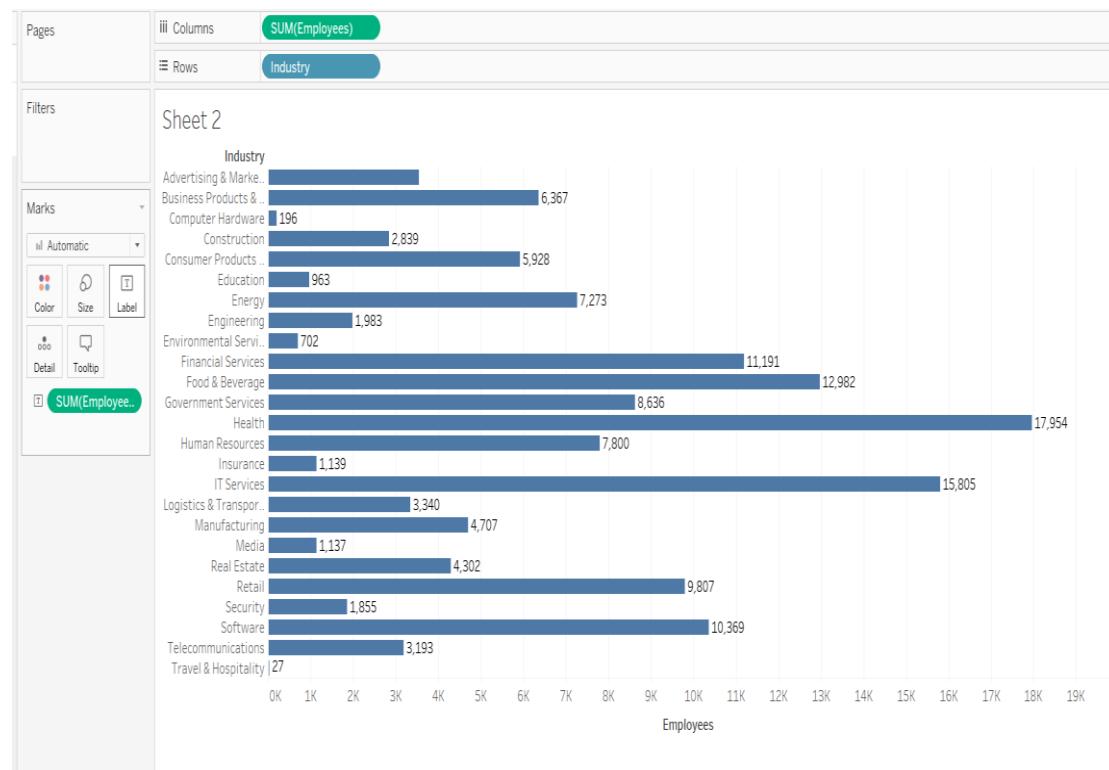
We can create group in another way to ...by shortcut



Swap it

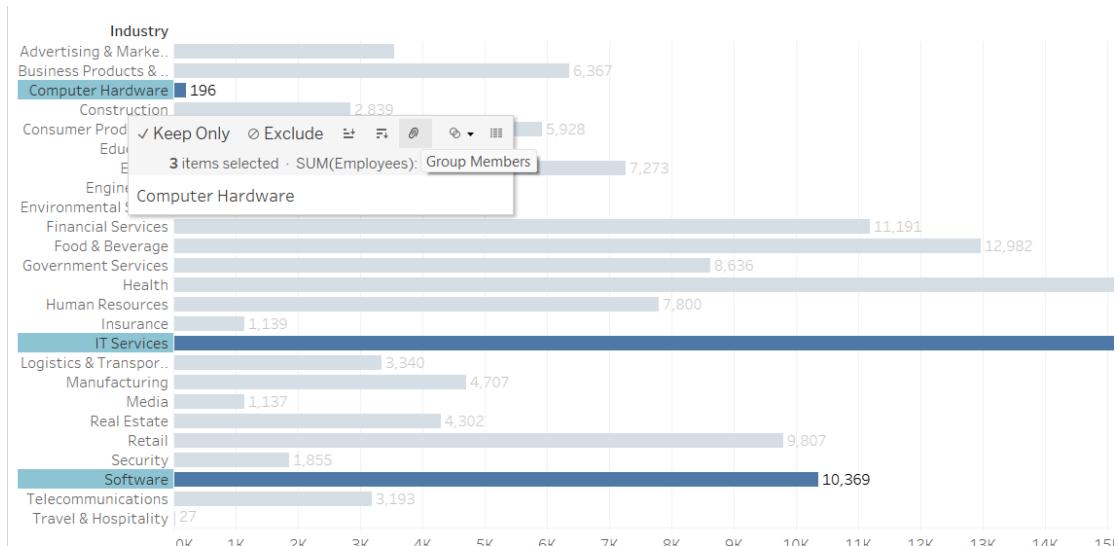


Control + drop employee it to label

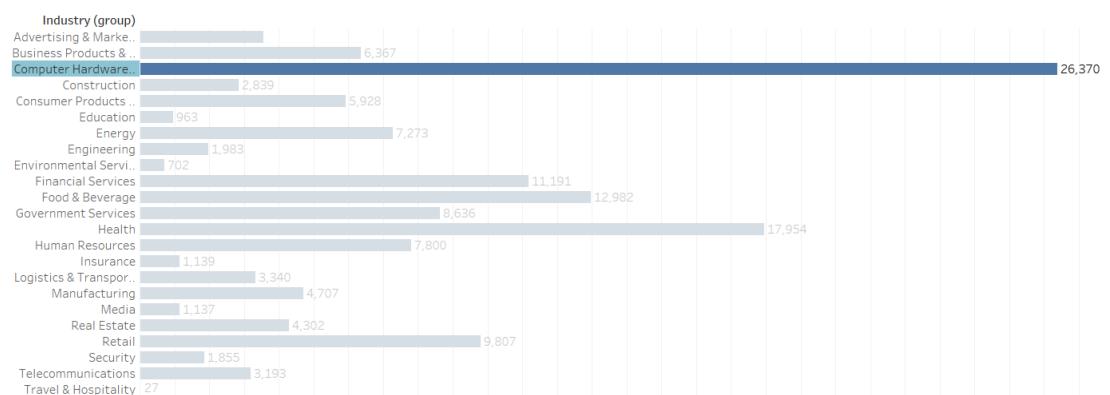


Now we want to create a group of hardware, software and IT services.

Control and select the items then we will see a group symbol there > click on that



Sheet 2



>> Right click > edit

2014 Expenses
2014 Growth %
2014 Profit
2014 Revenue

2015

Description
ID
Industry
Industry (group)
Metro Area
Name
State, City
State
City
Year Founded
Year Founded (group)
Measure Names

Edit Group [Industry (group)]

Field Name: Industry (group)

Groups: Add to:

- > Computer Hardware, IT Services, Software
- Construction
- Consumer Products & Services
- Education
- Energy
- Engineering
- Environmental Services
- Financial Services
- Food & Beverage
- Government Services
- Health

Group Rename Ungroup Show Add Location

Include 'Other' Find >

Reset OK Cancel Apply

Edit Group [Industry (group)]

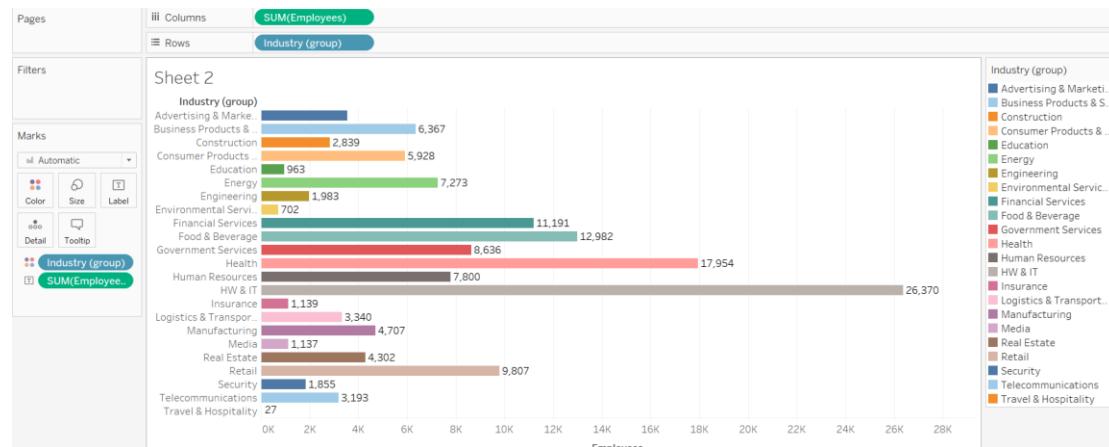
Field Name: Industry (group)

Groups: Add to: Computer Hardware, IT Services, Software

Advertising & Marketing
Business Products & Services
> HW & IT
Construction

Rename it

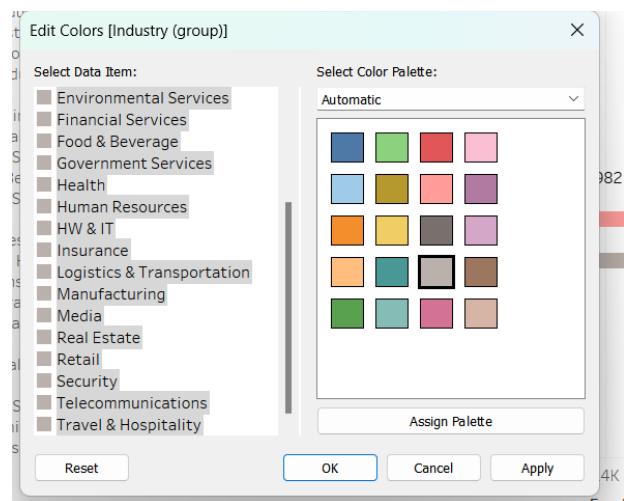
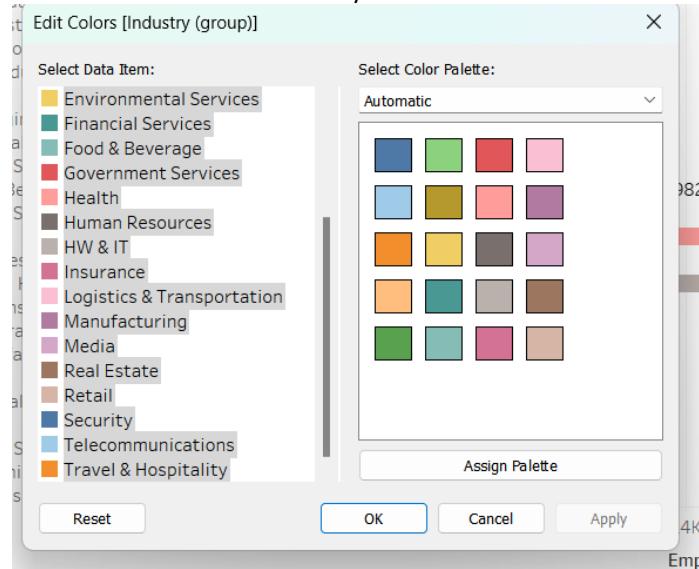
>> To change the color >>
Put the industry group to the color >

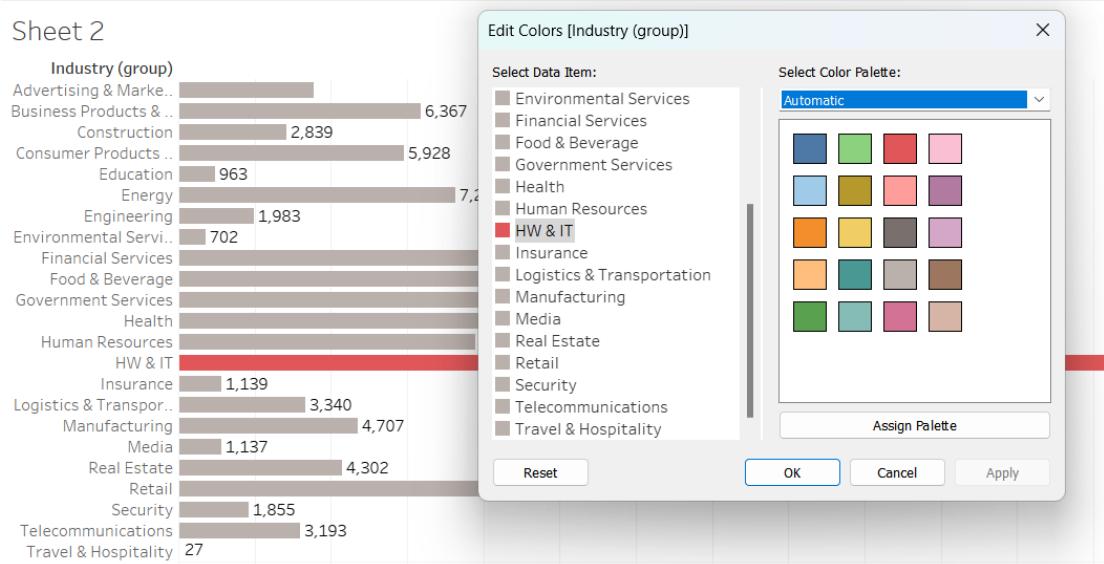


>> So if I want to highlight only hw & it

>> Go to edit color

>> Select all shift with arrow key



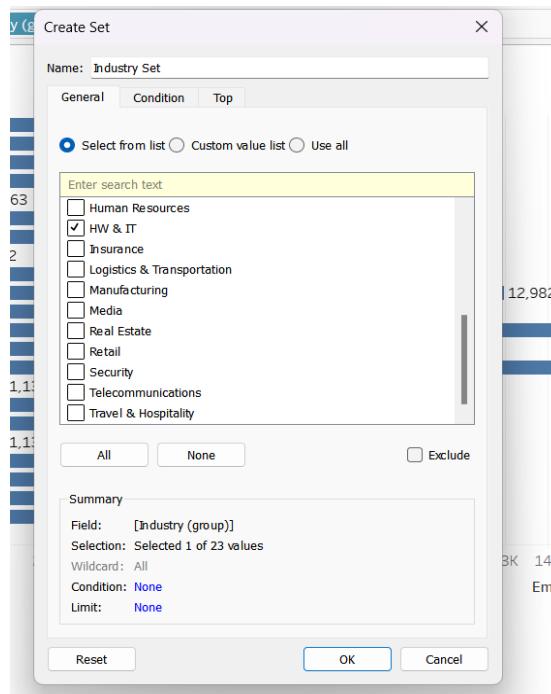


This is not a good way to change color that's why we choose set

Set is dynamic .. set can create a condition automatically .

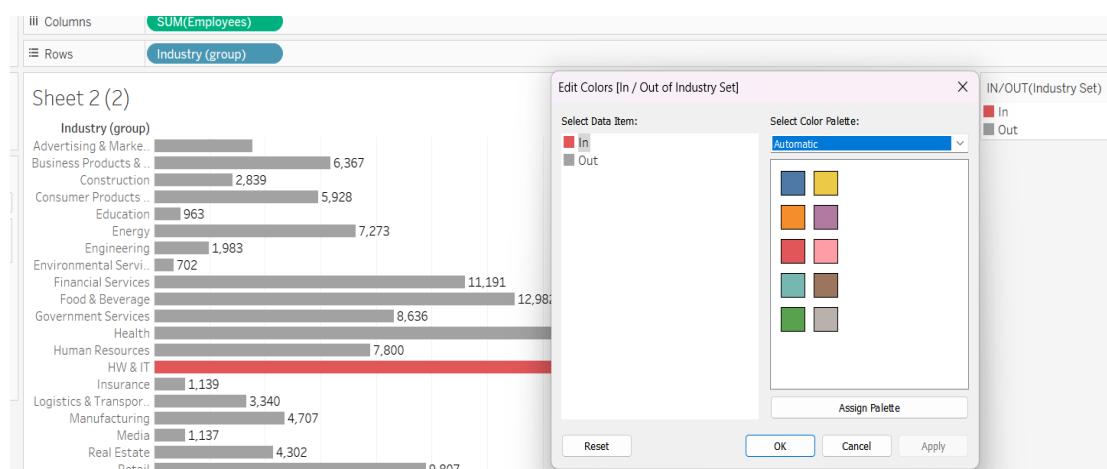
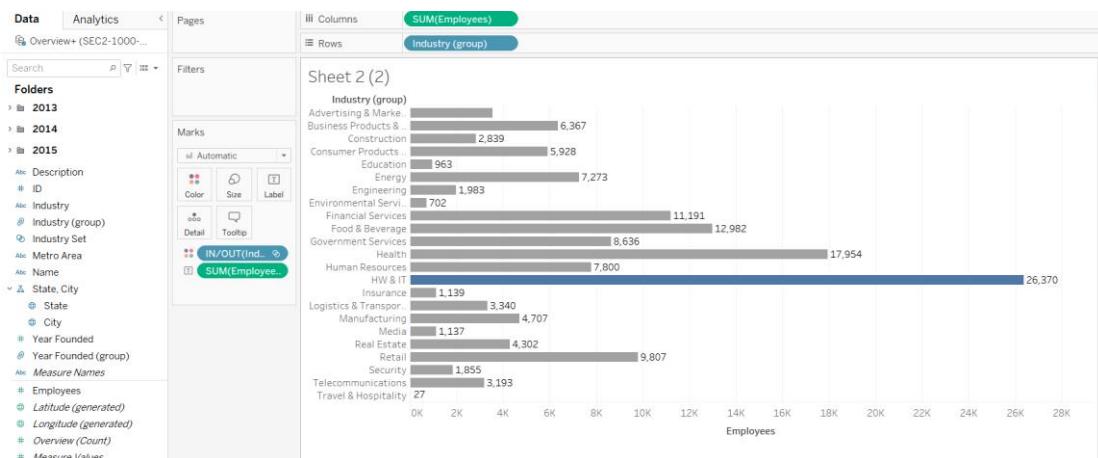
>> Create a duplicate > remove the industry group

>> Now I want to create a set.

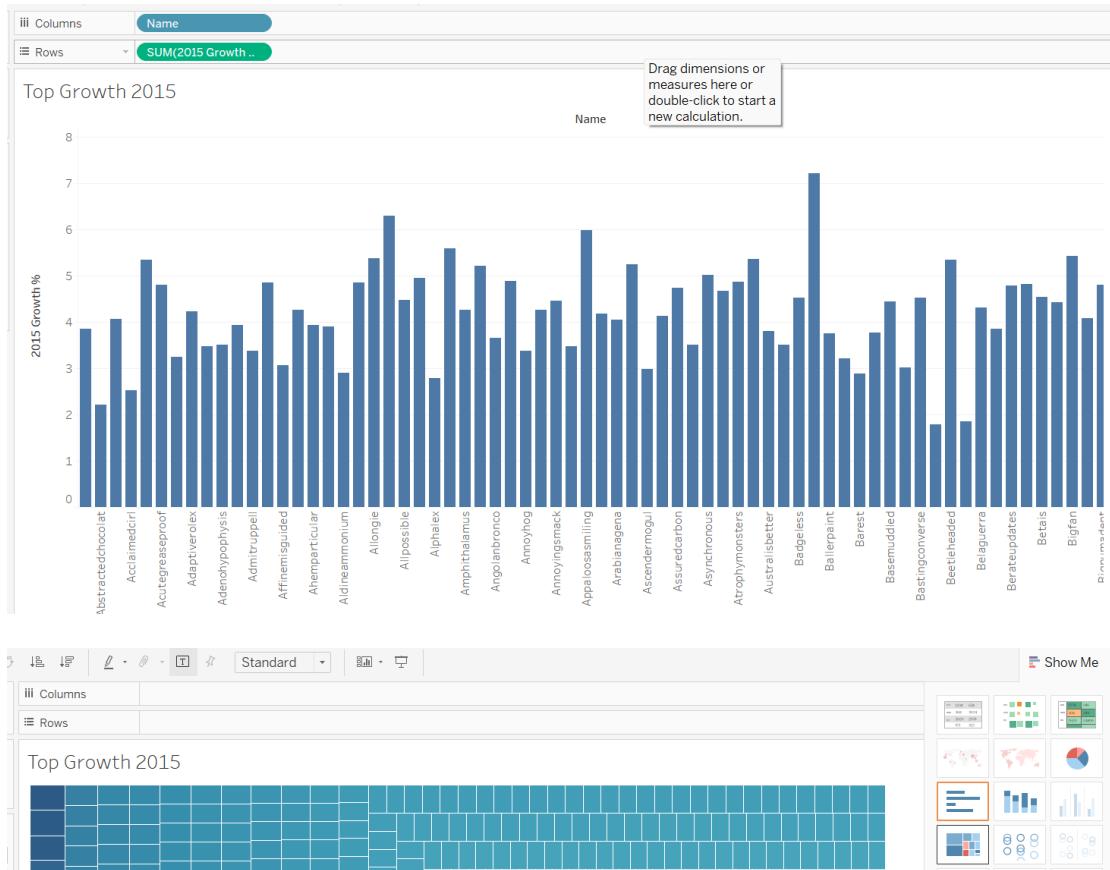


Rename ans select>>

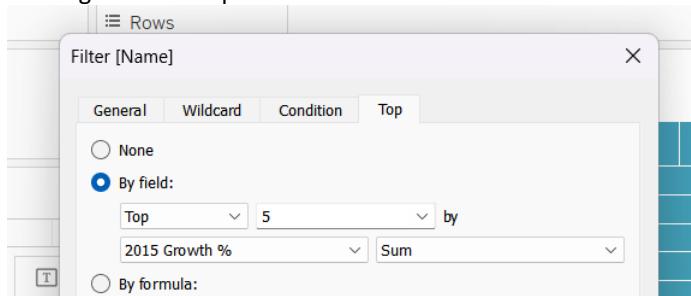
>> Now drag the industry set into colors



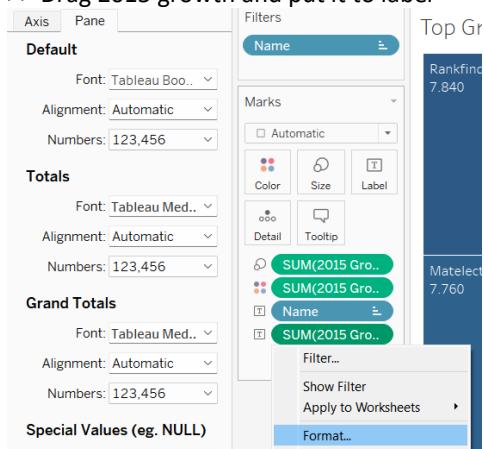
> Take a new sheet rename top growth 2015



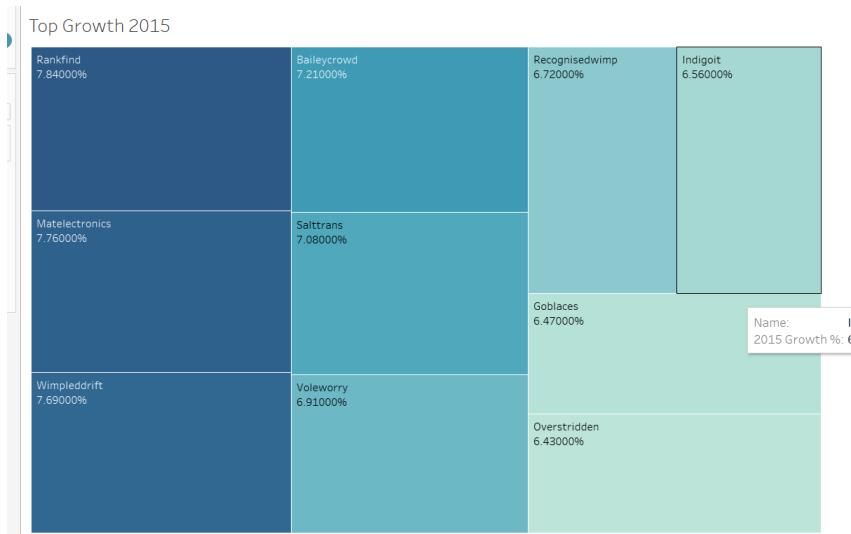
>> Drag name > drop to filter



>> Drag 2015 growth and put it to label



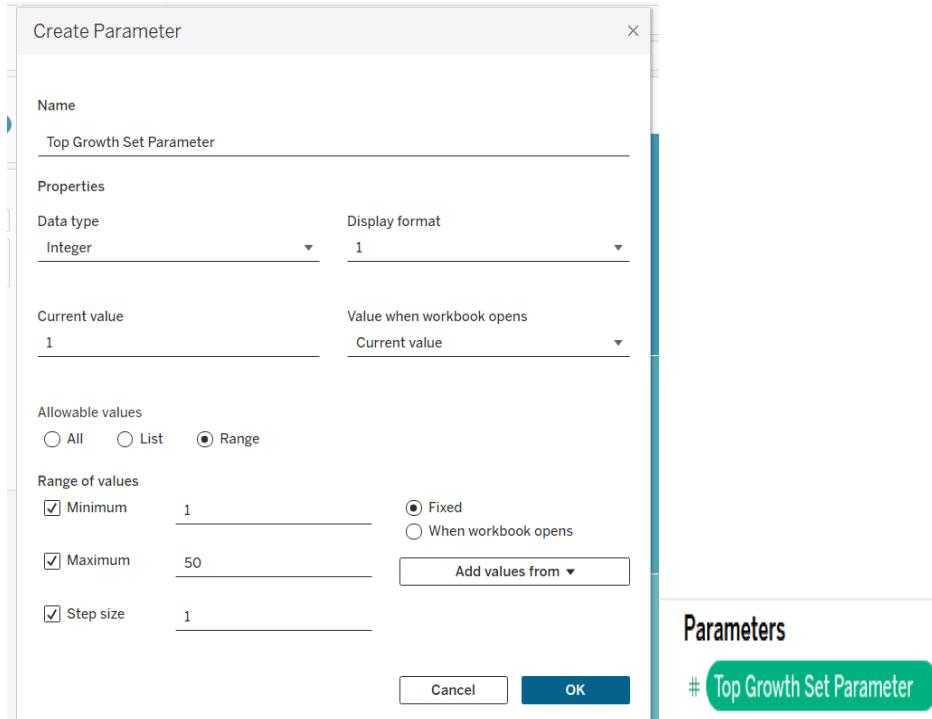
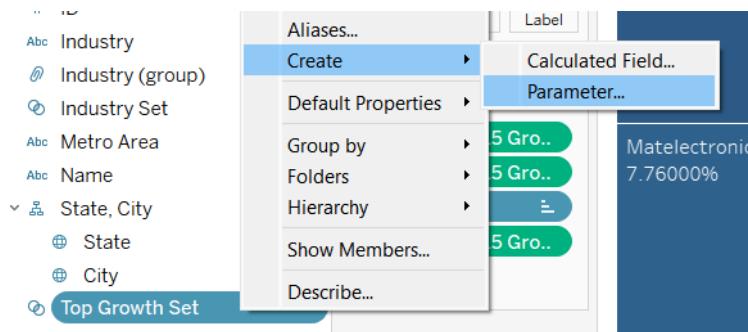
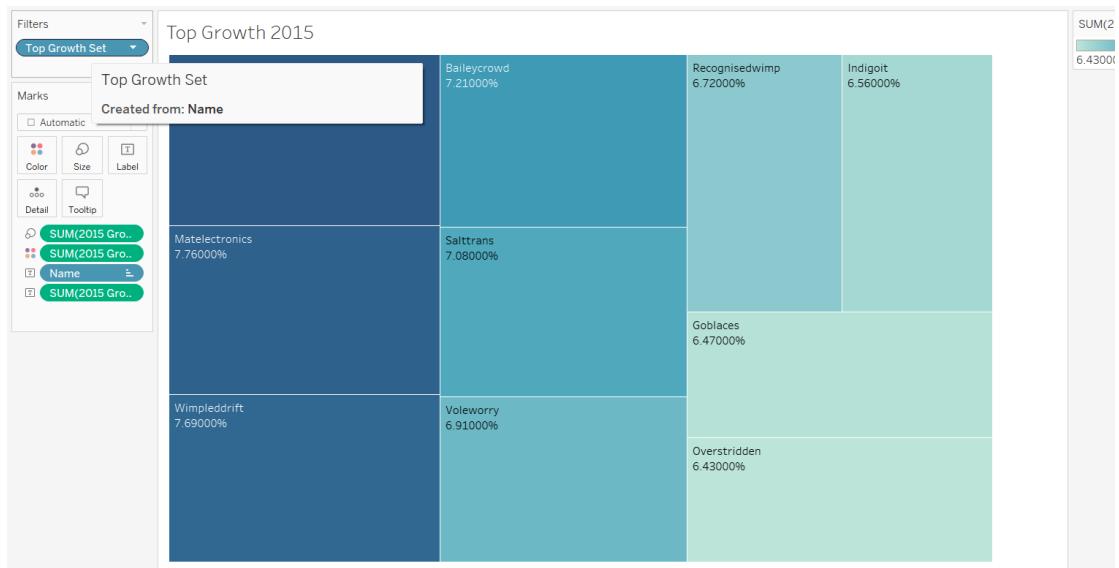
>> to get %

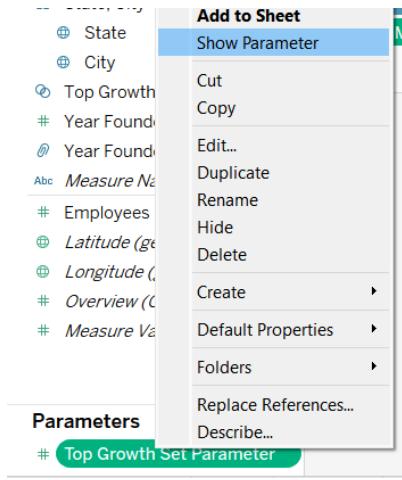


>> Lets see how can I create a parameter

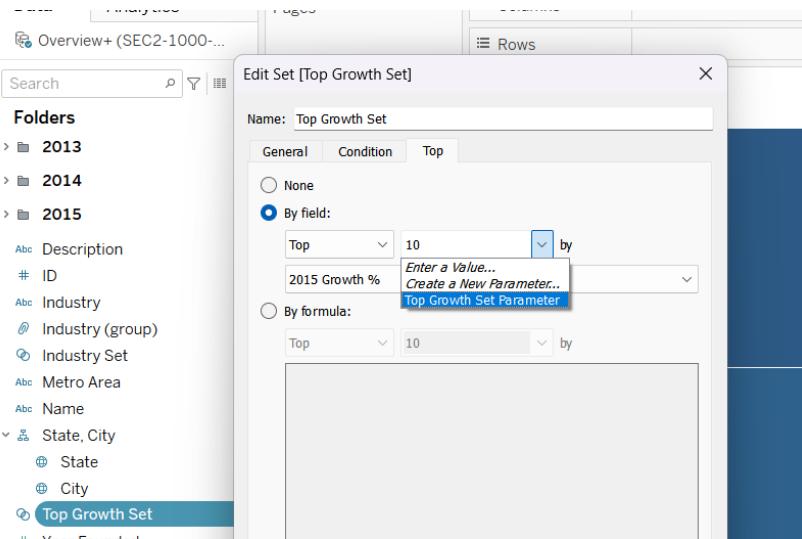
...creating a set first then we will work with parameter

Top growth set put it to the filter now ..



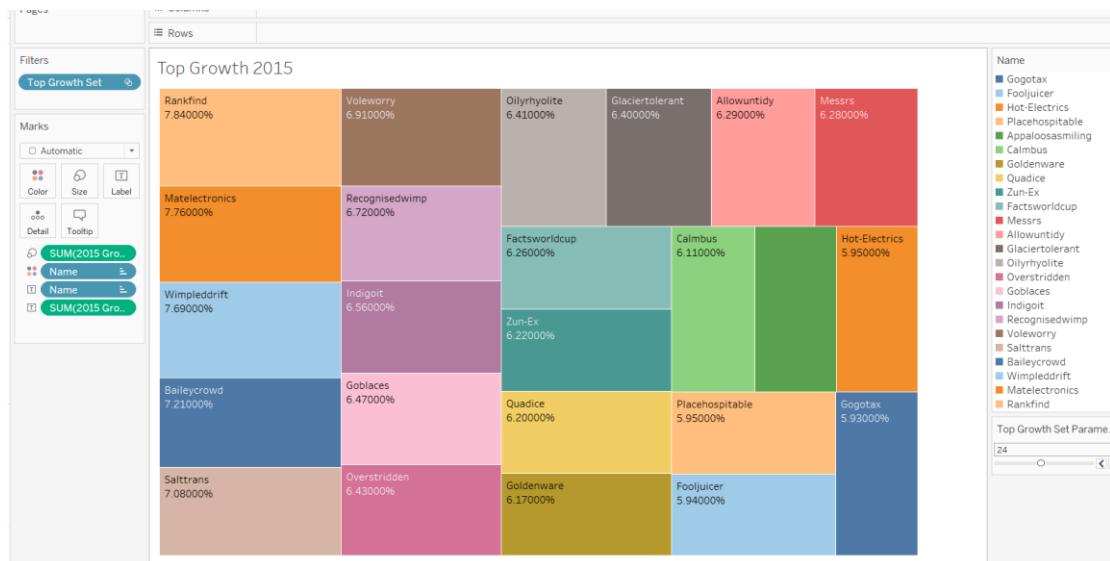


>> Right click top growth set > click on edit set



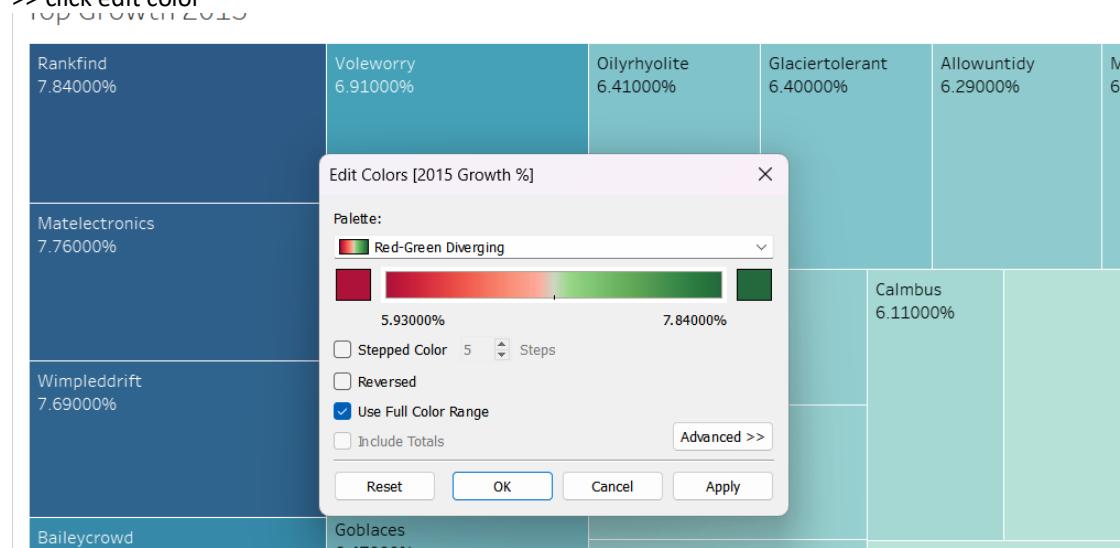
>> press ok

>> Put name into the color

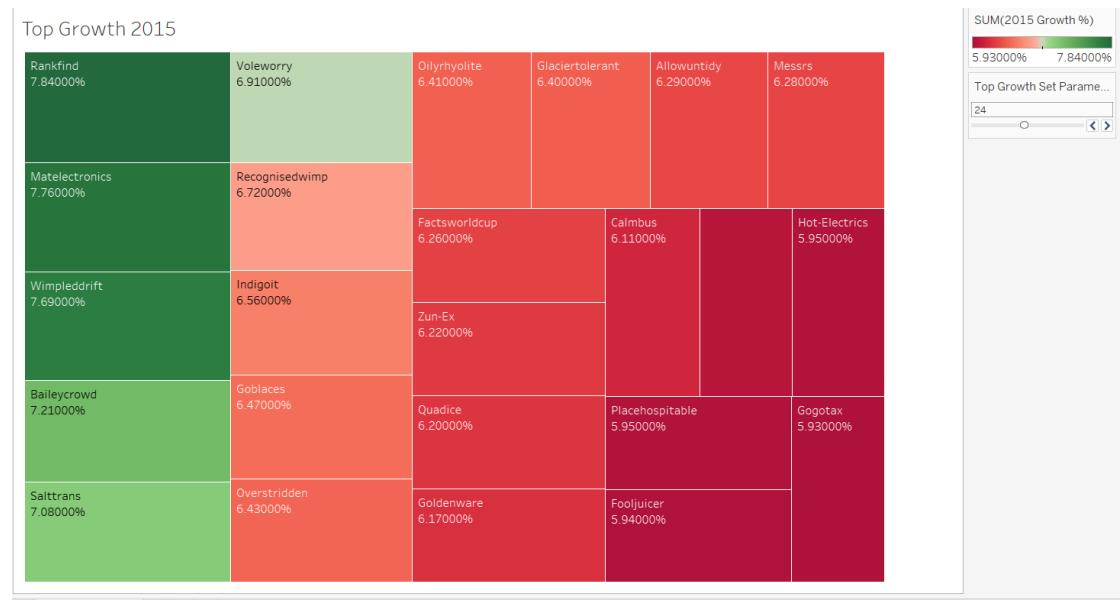


Or if we want 2 color ..under 1 step if u did the previous one

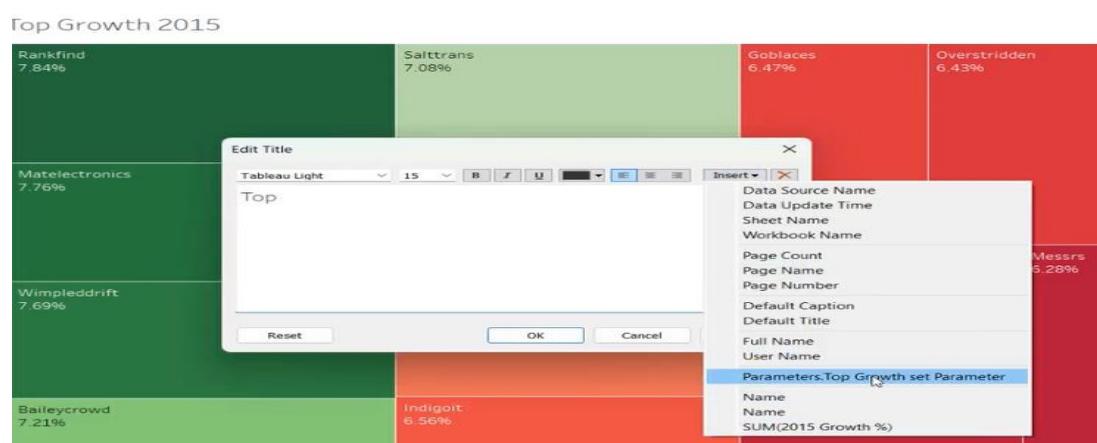
>> click edit color



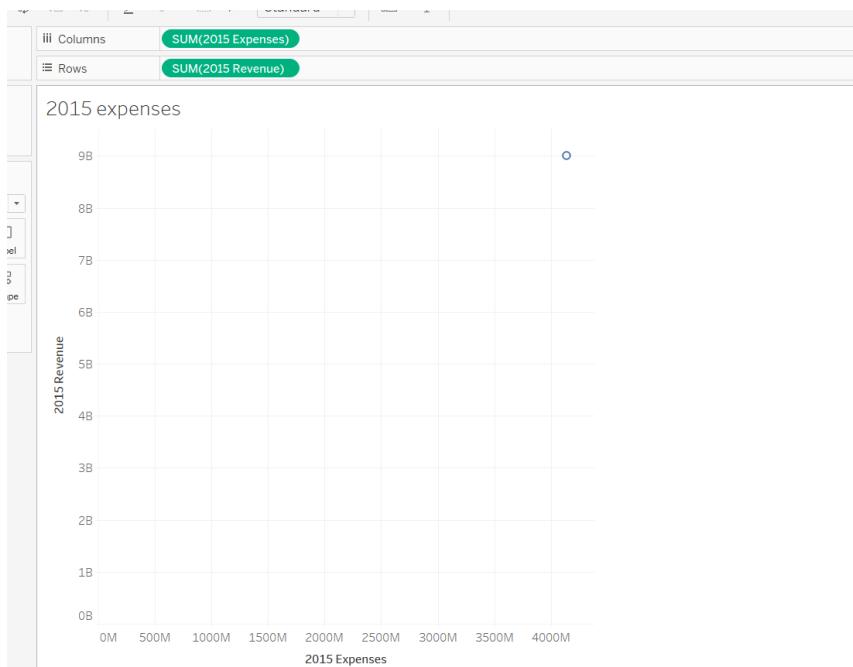
Press ok



>> If we want to change the heading and make it dynamic



> Create a new sheet rename 2015 expenses



It is showing only one dot .. for showing all ..go analysis and take out the tick mark of measure

Show Mark Labels
✓ Aggregate Measures

Stack Marks
View Data...
Explain Data Settings...
Reveal Hidden Data

Percentage Of

Totals
Forecast
Trend Lines
Special Values
Table Layout

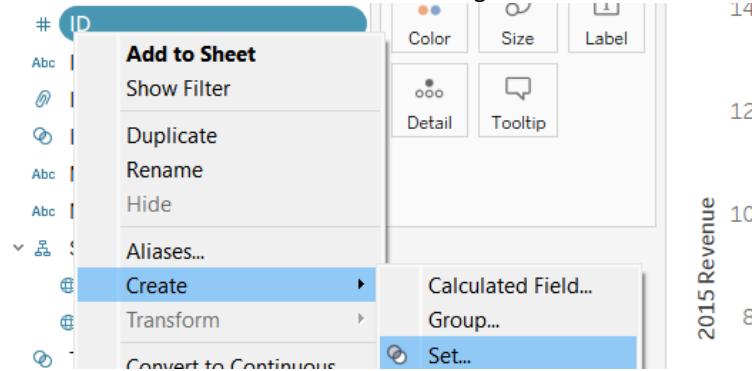
Story Analysis Map Format Server Window Help



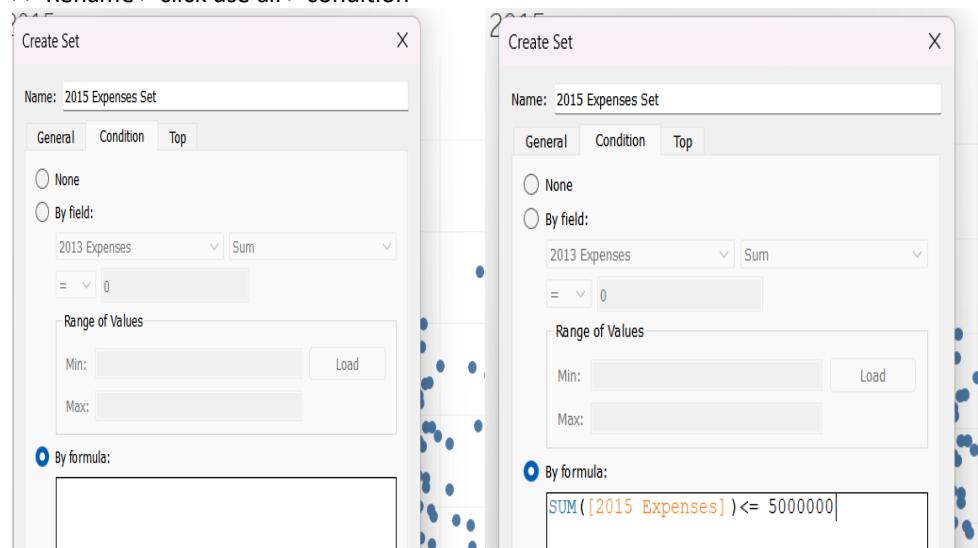


>> So we want to see the companies expenses below 5M

>> So we need to create a set .So we will right click on ID because that is unique .



>> Rename > click use all > condition

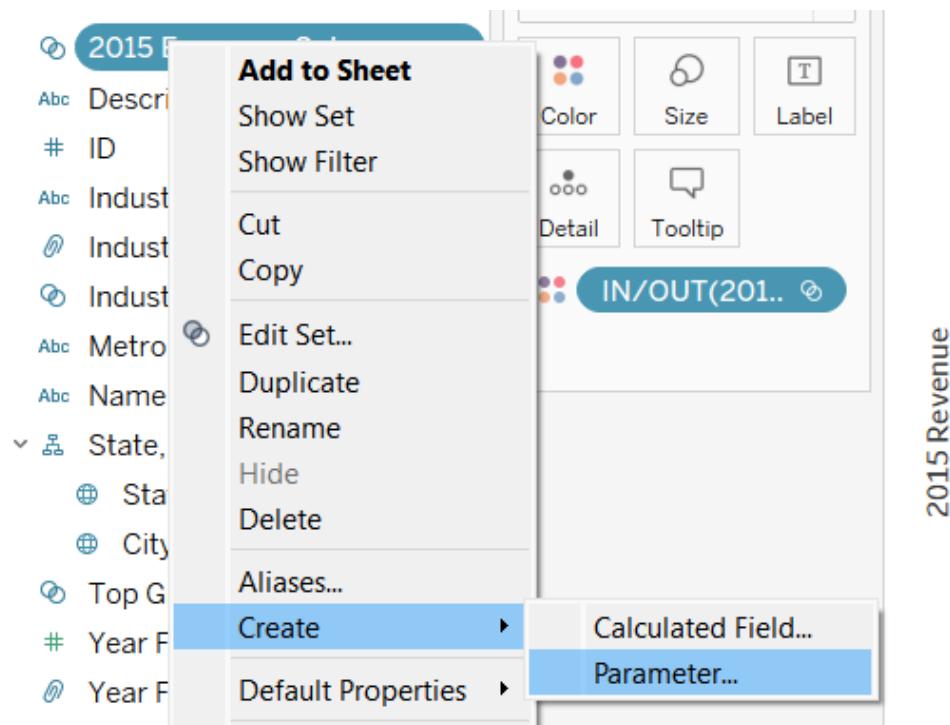


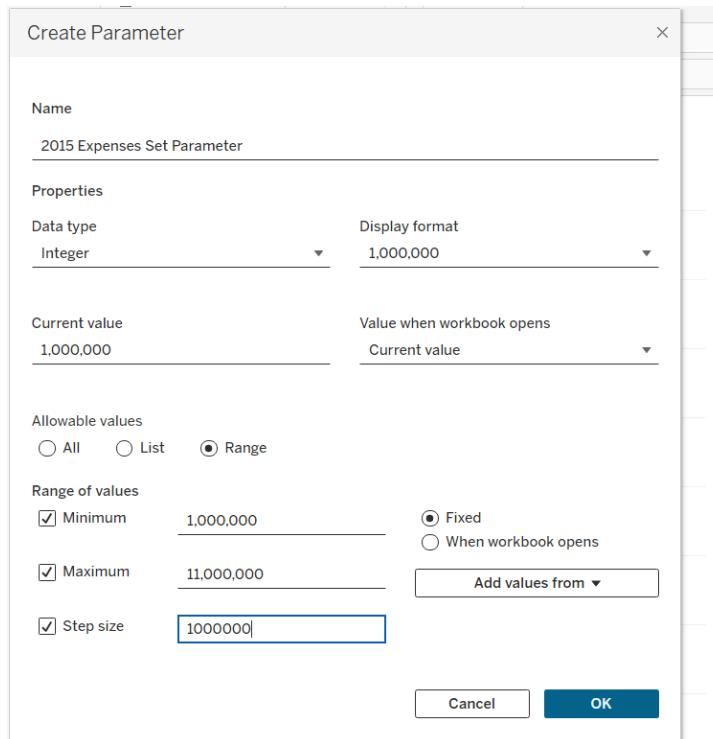
Click ok

>> Drag it and put it into the color

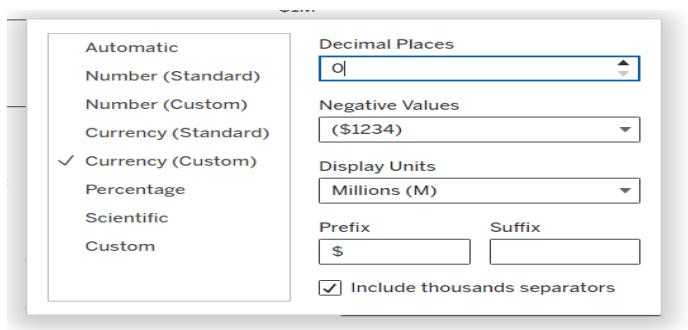


>> So we will create a parameter .



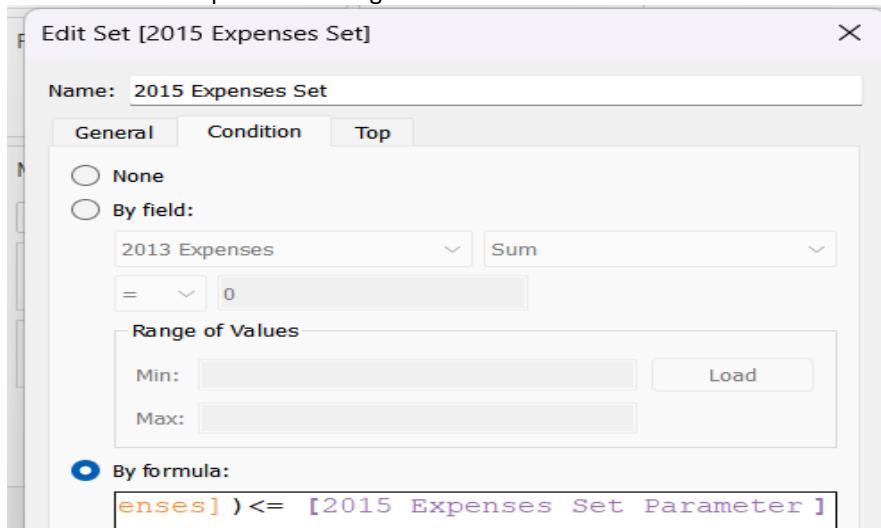


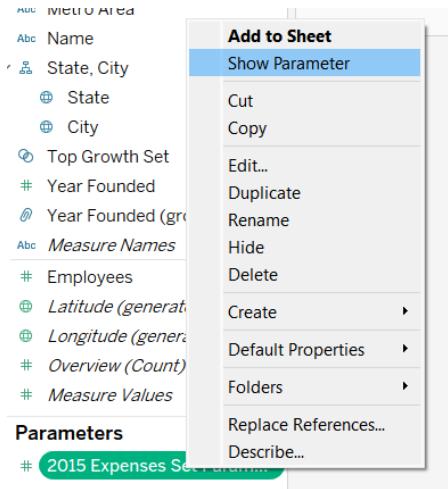
Display format>



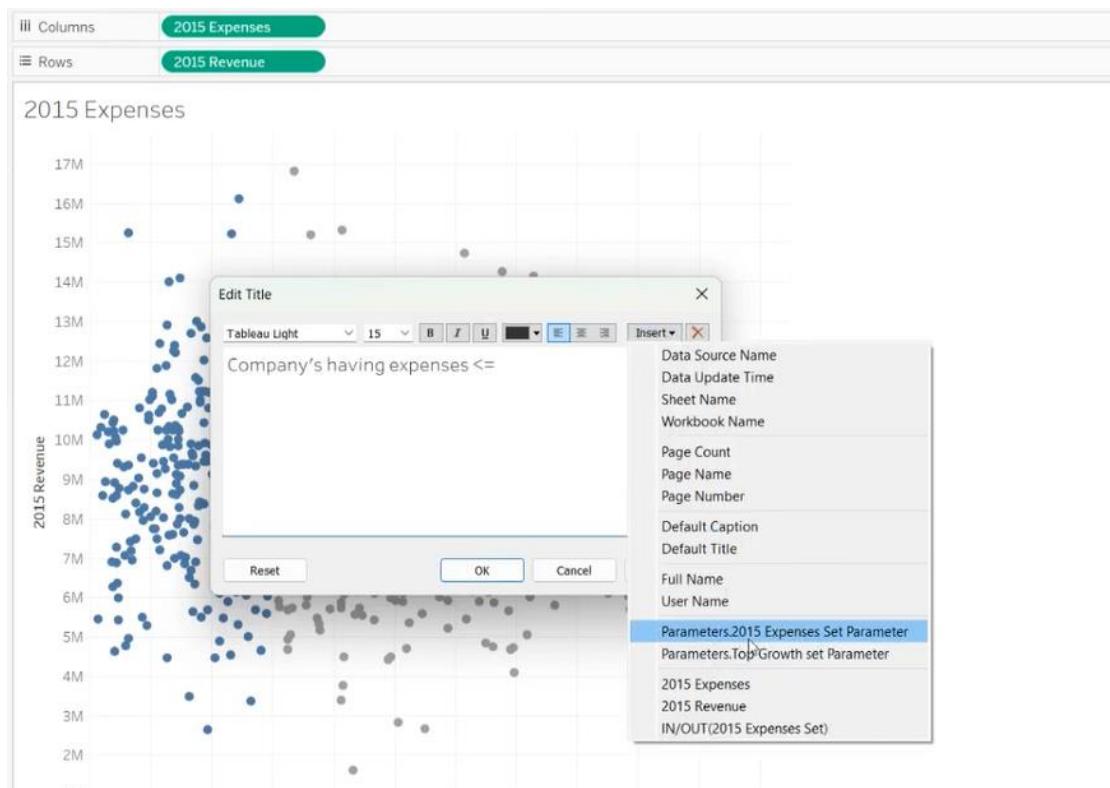
>> lets go to 2015 expense sheet > click edit now change it like below

Instead of 5M and put it ... rest is good



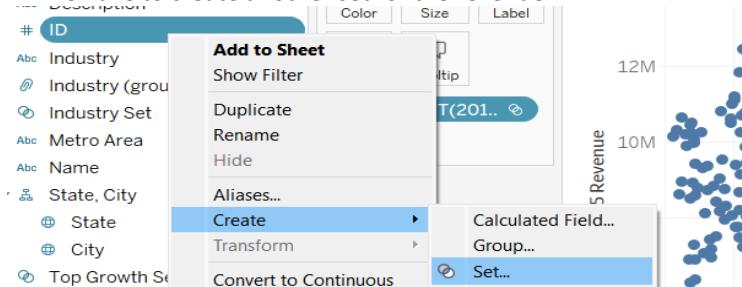


Double click header > remove text and write



>> Create a duplicate

>> We have to create another set for the revenue



>> use all > condition > formula

Create Set

Name: 2015 Revenue Set

General Condition Top

None

By field:

2013 Expenses Sum
= 0

Range of Values
Min: Load
Max:

By formula:
`SUM([2015 Revenue]) >= 8000000`

click ok

> Drag 2015 revenue set and put it into color

2015

2015 Expenses Set

2015 Revenue Set

Description ID Industry Industry (group) Industry Set

IN/OUT(201..)

>> Now we will create a parameter

2015 Revenue Set

Description ID Industry Industry (group) Industry Set

Metro Area Name State, City

State City

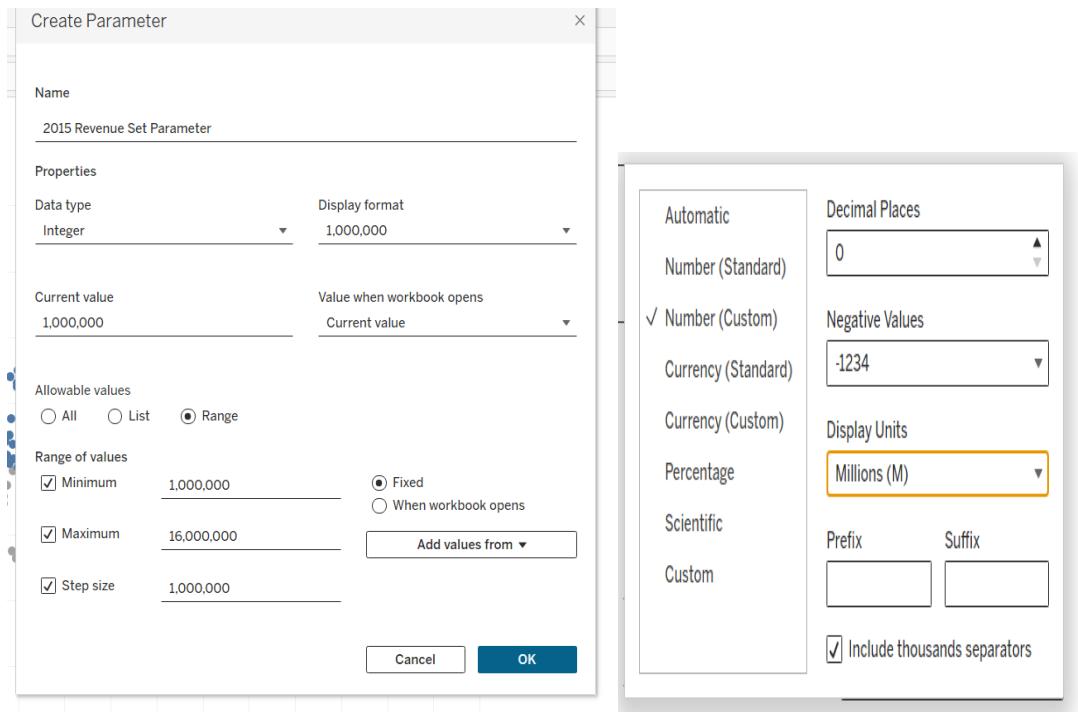
Top Growth Set

Year Founded Year Founded (group)

Measure Names

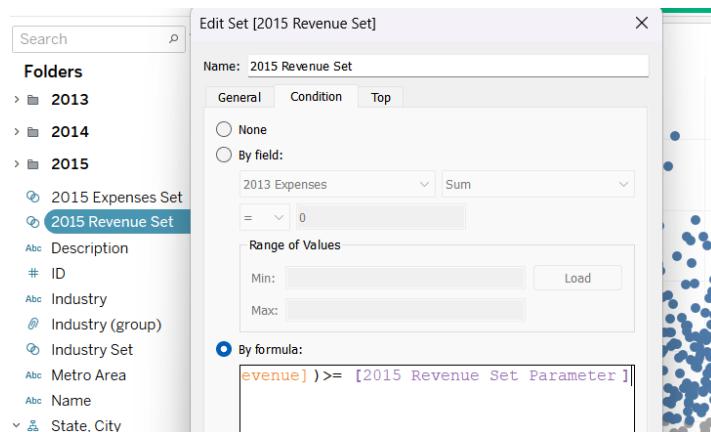
Add to Sheet

- Show Set
- Show Filter
- Cut
- Copy
- Edit Set...
- Create Combined Set...
- Duplicate
- Rename
- Hide
- Delete
- Aliases...
- Create > Calculated Field...
- Create > Parameter...
- Default Properties

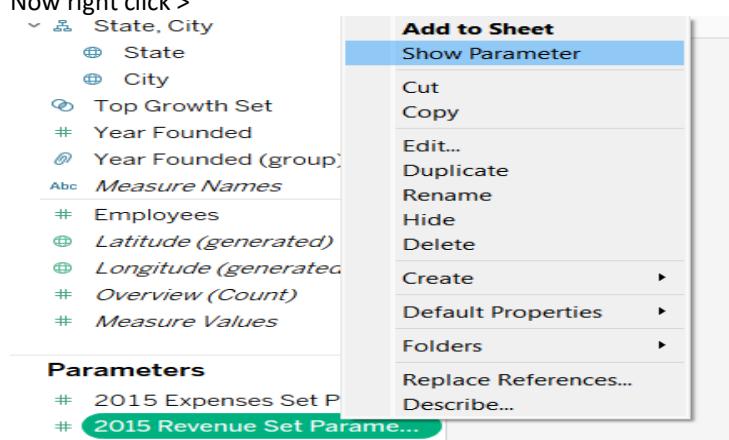


>> Now go to 2015 revenue set > Edit set

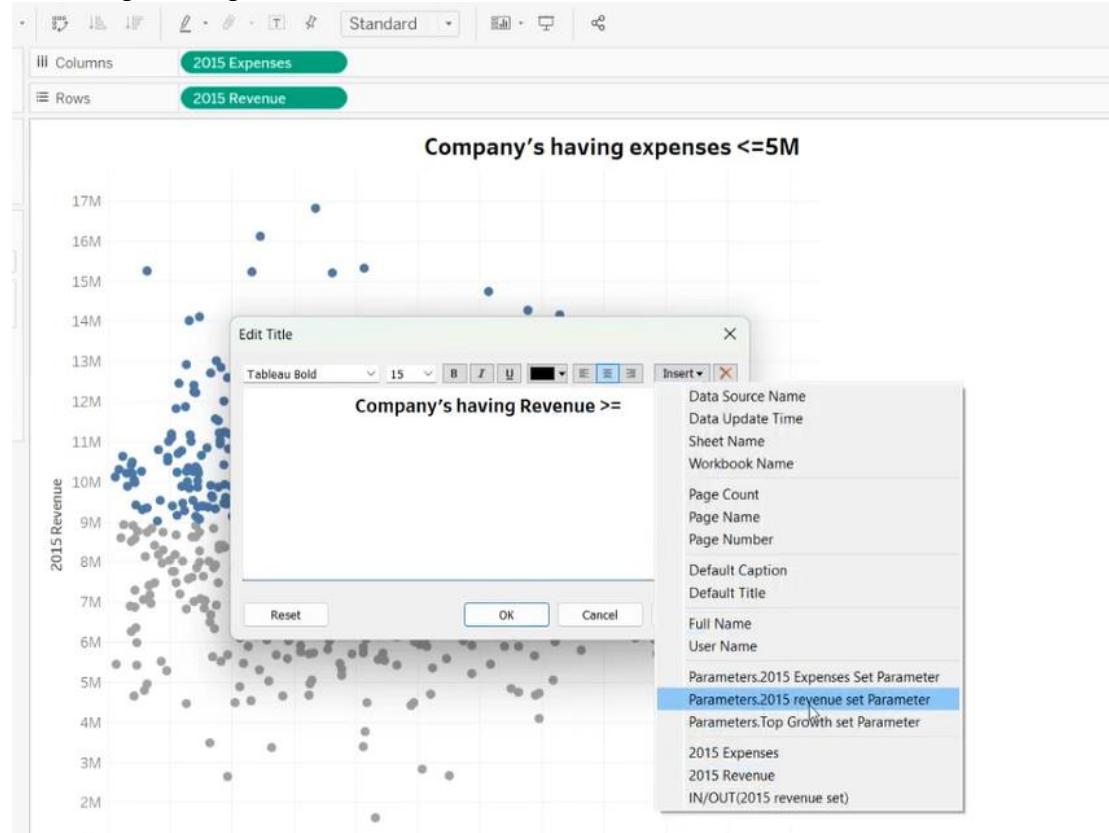
>> Now the previous 8M , we will replace with parameter then click ok



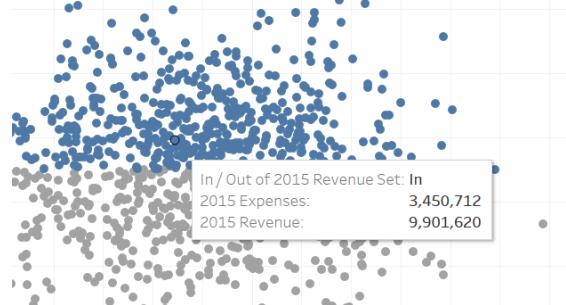
Now right click >



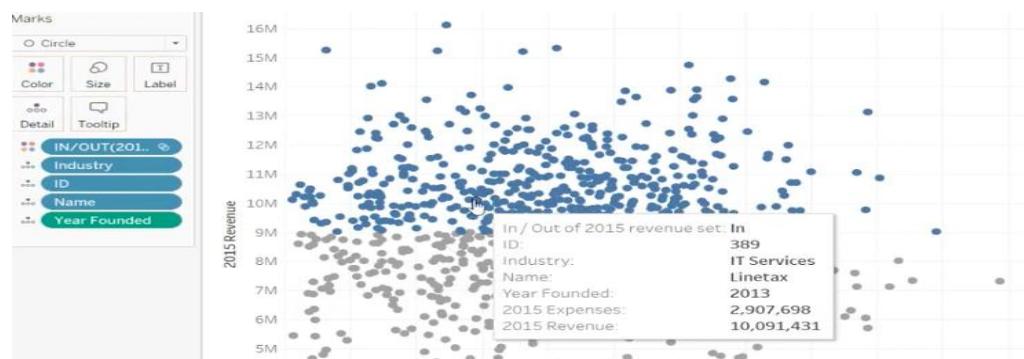
Now change heading



>> we can see it is show only two info



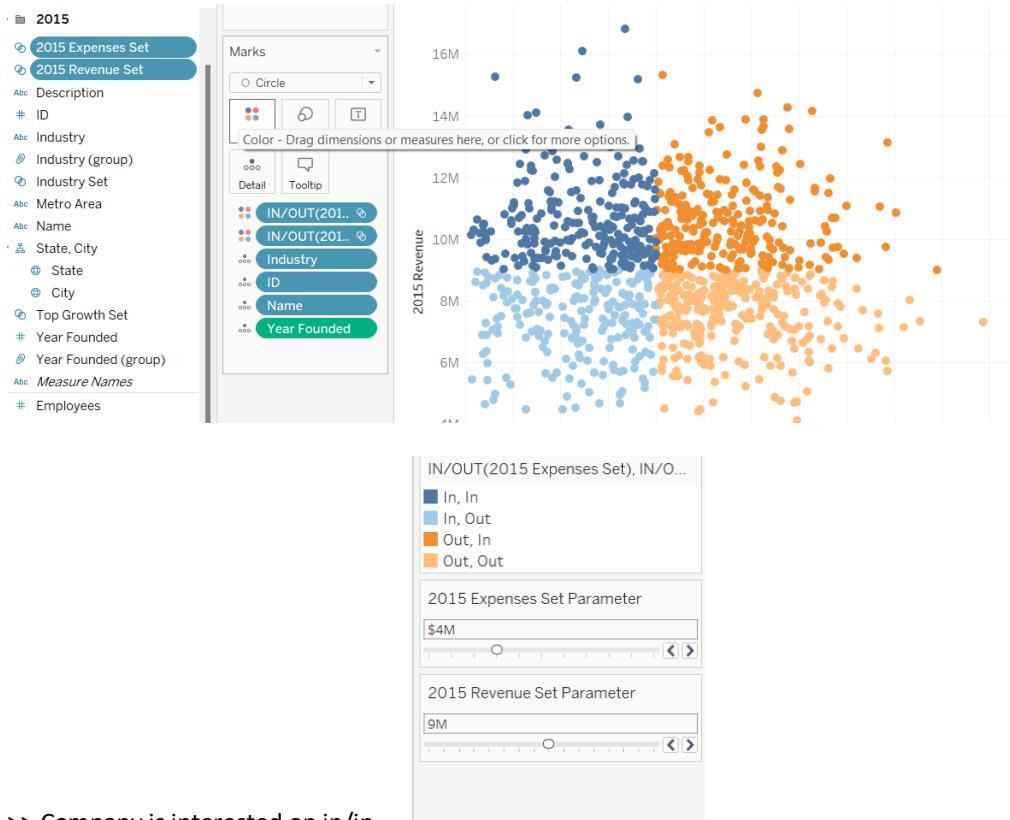
For more information >> Drag and drop these into details



>> Now change the name of the sheet to 2015 revenue

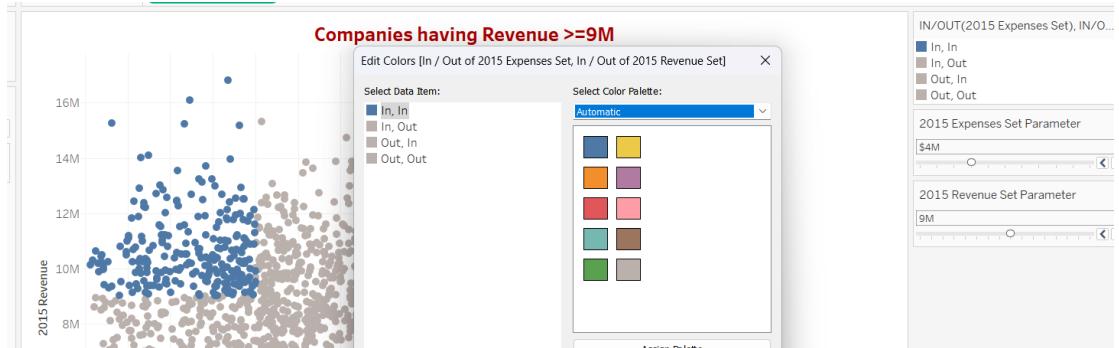
>> Create a duplicate sheet and rename 2015 expenses and revenue

>> Drag and drop ...by selecting 2015 expense and revenue set at the same time to colors

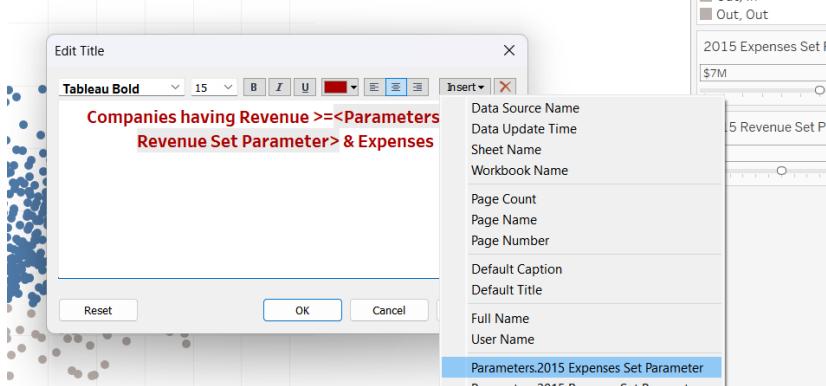


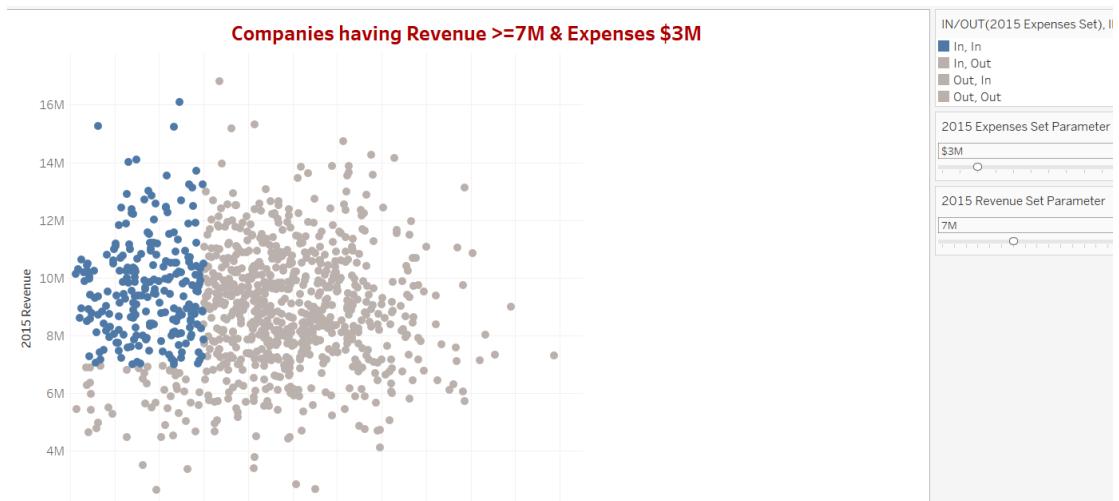
>> Company is interested on in/in

>> So do edit color



Change the heading





>> We want the top growth companies too >>
 > Do a duplicate of the sheet > rename > 2015 expense, revenue & top growth

>> Select these 3 sets together and put it into the color

Folders

- > 2015
 - 2015 Expenses Set
 - 2015 Revenue Set
 - Description
 - ID
 - Industry
 - Industry (group)
 - Industry Set
 - Metro Area
 - Name
 - State, City
 - State
 - City
 - Top Growth Set
 - Year Founded

Marks

- Cir
- Color
- Detail

Edit Colors [In / Out of 2015 Expenses Set, In / Out of 2015 Revenue Set, In...]

Select Data Item:

- In, In, In
- In, In, Out
- In, Out, In
- In, Out, Out
- Out, In, In
- Out, In, Out
- Out, Out, In
- Out, Out, Out

Select Color Palette:

Automatic

Blue	Yellow
Orange	Purple
Red	Pink
Cyan	Brown
Green	Grey

Assign Palette

Reset OK Cancel Apply

IN/OUT(2015 Expenses Set, ...)

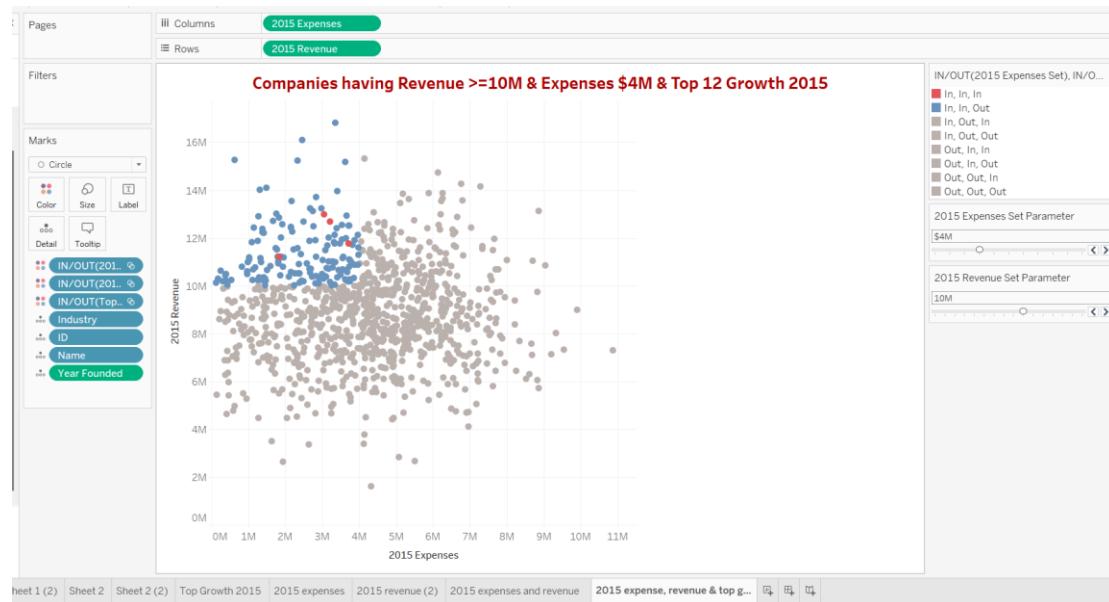
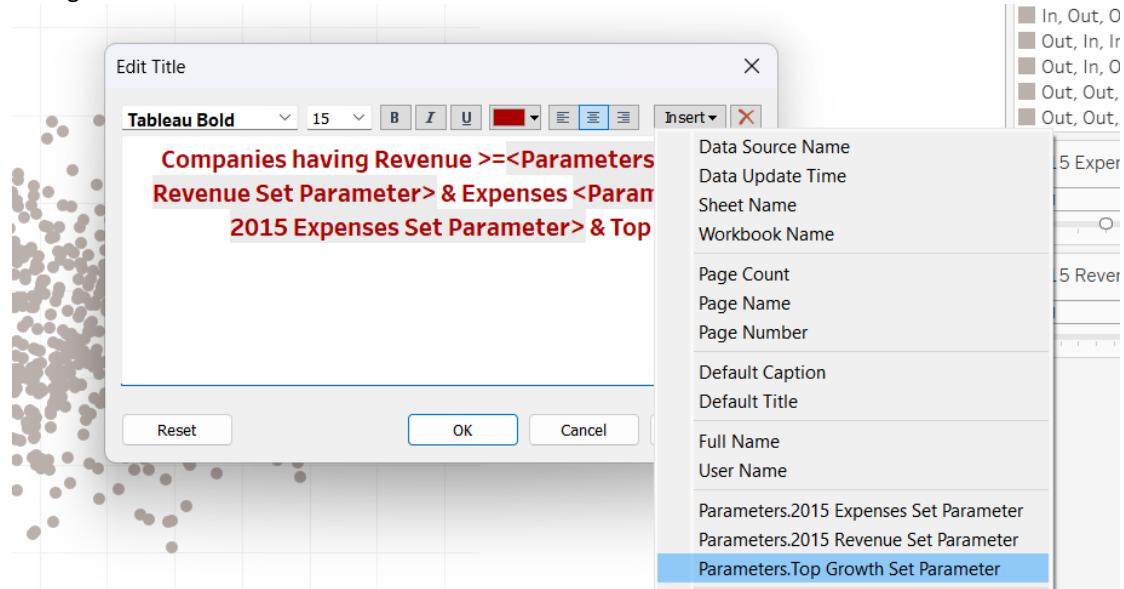
2015 Expenses Set Parameter

\$4M

2015 Revenue Set Parameter

10M

Change it >



You are a Data Scientist and you have to create an animated dashboard showing how populations of countries across the World have been developing over the past 50 years.

Specifically, the stakeholders of this assignment are interested to see overall trends in fertility, life expectancy and population. In addition to overall trends they would like to be able to drill into individual countries.

After bringing data, hide the unnecessary column what I don't need to visualize.

The screenshot shows the Tableau Data Editor interface. The connection is set to 'Country-Population' from 'Microsoft Excel'. The 'Data' sheet is selected. The data table has columns for Country Name, Country Code, and years from 1960 to 1972. The data for Aruba and Andorra is visible.

Country Name	Country Code	1960	1961	1962	1963	1964	1965	1966	1967	1968	1969	1970	1971	1972
Aruba	ABW	54,208	55,435	56,226	56,697	57,029	57,360	57,712	58,049	58,385	58,724	59,065	59,438	59,841
Andorra	AND	13,414	14,376	15,376	16,410	17,470	18,551	19,646	20,755	21,888	23,061	24,279	25,560	26,891

>>

The screenshot shows the Tableau Data Editor interface with the same connection and data source. The context menu for the '1960' column is open, and the 'Pivot' option is highlighted.

The screenshot shows the Tableau Data Editor interface with the 'Pivot' section selected. It displays the 'Pivot Field Names' and 'Pivot Field Values' for Aruba's population data.

Pivot Field Names	Pivot Field Values
1960	54,208
1961	55,435
1962	56,226
1963	56,697
1964	57,029
1965	57,360

Rename >

Sort fields Data source order

Country Name	Country Code	Year	Population
Aruba	ABW	1960	54,208
Andorra	AND	1960	13,414
Afghanistan	AFG	1960	8,994,793
Angola	AGO	1960	5,270,844
Albania	ALB	1960	1,608,800

>> To fill the null value > click filter (for handling the null values)

Data (Country-Population)

Connection: Live Extract Filters 0 | Add

Data

Sort fields Data source order

Show aliases Show hidden fields 1,000 row

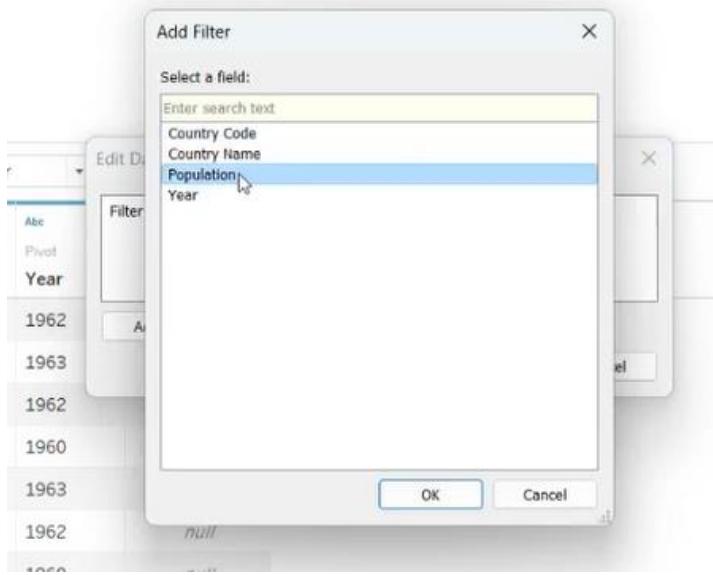
Country Name	Country Code	Year	Population
Taiwan, China	TWN	1962	null
West Bank and G...	PSE	1963	null
West Bank and G...	PSE	1962	null
West Bank and G...	PSE	1960	null
Taiwan, China	TWN	1963	null
Sint Maarten (Dutch)	SXM	1962	null
Taiwan, China	TWN	1960	null
Serbia	SRB	1962	null
Sint Maarten (Dutch)	SXM	1961	null
Taiwan, China	TWN	1961	null

Edit Data Source Filters

Add... Edit... Remove OK Cancel

Source order

Code	Year
1962	
1963	
1962	null
1960	null



> click ok > ok

So the null value is filled up.

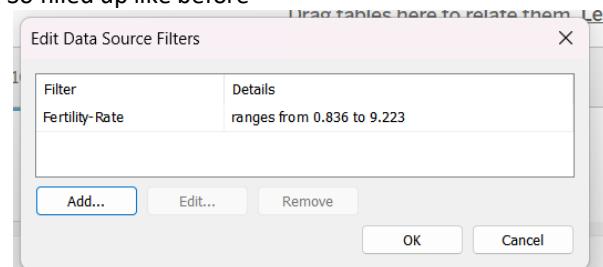
> bring another file

> Data > New data source

> Do the same thing with this file (contains null values)

Country Name	Country Code	Year	Fertility Rate
Aruba	ABW	1960	4.8200
Andorra	AND	1960	null
Afghanistan	AFG	1960	7.67100

So filled up like before



>> Do it for another file ..

Tableau Public - Book1

File Data Window Help

Connections Add

Life-Expectancy-At-Birth Microsoft Excel

Sheets

Use Data Interpreter
Data Interpreter might be able to clean your Microsoft Excel workbook.

Data

New Union

New Table Extension

Data (Life-Expectancy-At-Birth)

Data

Need more data?
Drag tables here to relate them. [Learn more](#)

Table Details

Data	Data	Abc	#
Country Name	Country Code	Pivot	Pivot
Aruba	ABW	2013	75.3322
Aruba	ABW	2012	75.2068
Aruba	ABW	2011	75.0804

>> Bring this

Tableau Public - Book1

File Data Window Help

Connections Add

Country-Metadata Microsoft Excel

Sheets

Use Data Interpreter
Data Interpreter might be able to clean your Microsoft Excel workbook.

Metadata - Countries

New Union

New Table Extension

Metadata - Countries (Country-Metadata)

Metadata - Countries

Need more data?
Drag tables here to relate them. [Learn more](#)

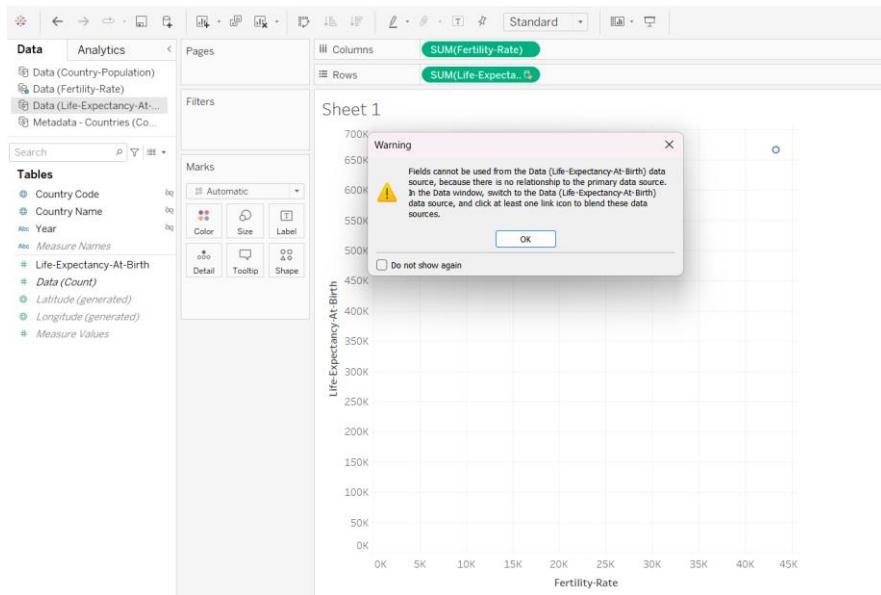
Table Details

Metadata - Countries	Metadata - Countries	Abc	Abc	Abc
Country Name	Country Code	Metadata - Countries	Metadata - Countries	Metadata - Countries
Aruba	ABW	Latin America & Caribbean	High income: nonOECD	SNA data for 2000-2011 are ...
Afghanistan	AFG	South Asia	Low income	Fiscal year end: March 20; re...
Angola	AGO	Sub-Saharan Africa	Upper middle income	April 2013 database update: ...

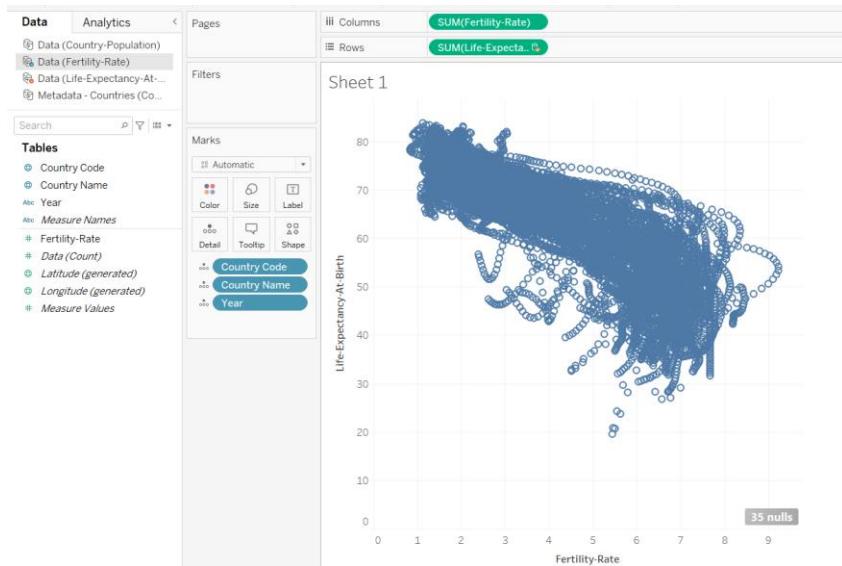
>> Now click on sheet one > we can see all four files



> Click on each file and bring these two below



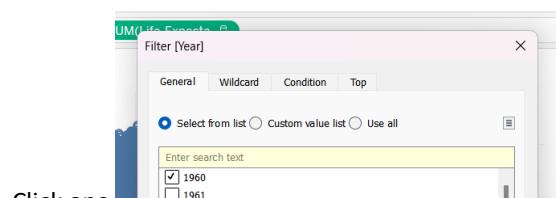
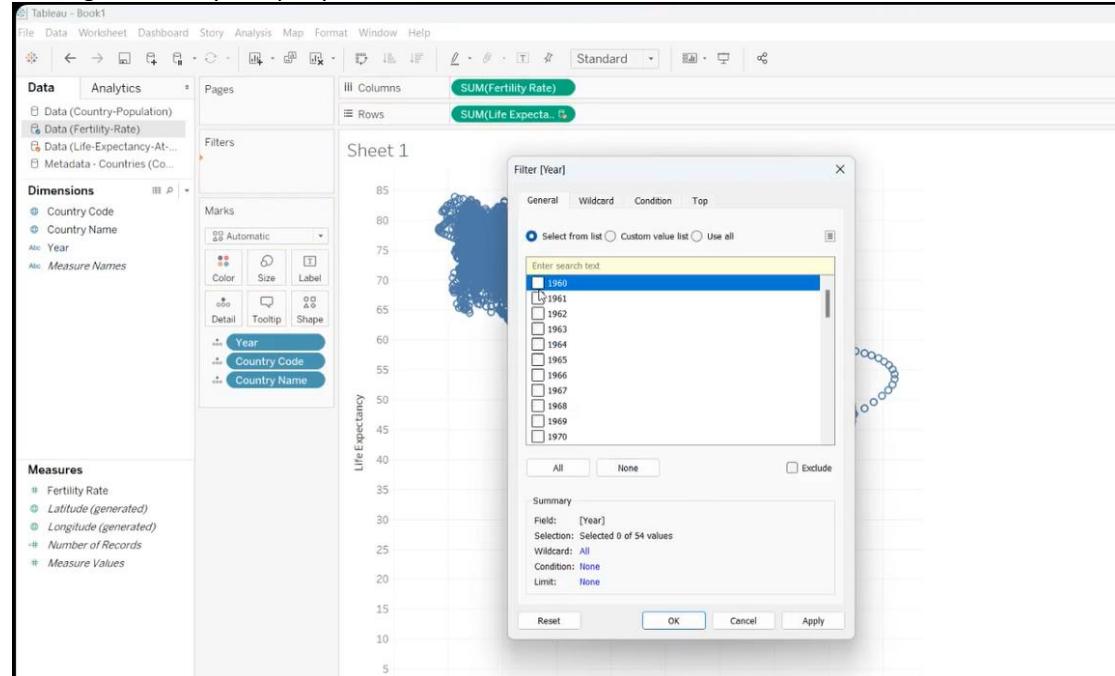
>> from fertility rate -- bring country code, country name and year and put it into details



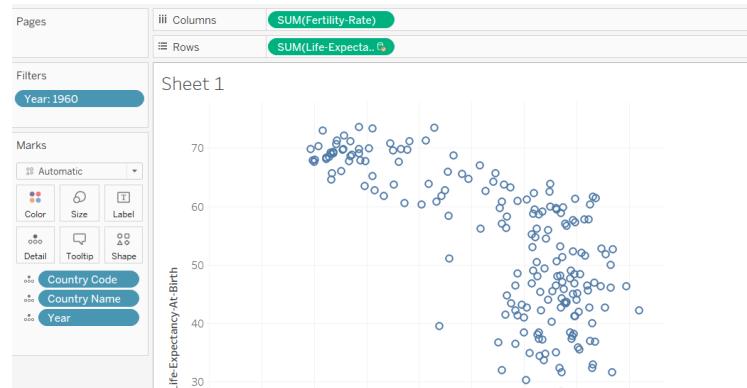
So they created a relationship here

The screenshot shows the Tableau Data window. The 'Data' pane on the left lists several data sources: 'Data (Country-Population)', 'Data (Fertility-Rate)', 'Data (Life-Expectancy-At-Birth)', and 'Metadata - Countries (Countr...'. The 'Tables' pane lists 'Country Code', 'Country Name', 'Year', and 'Measure Names'.

So we go to fertility and put year into filter



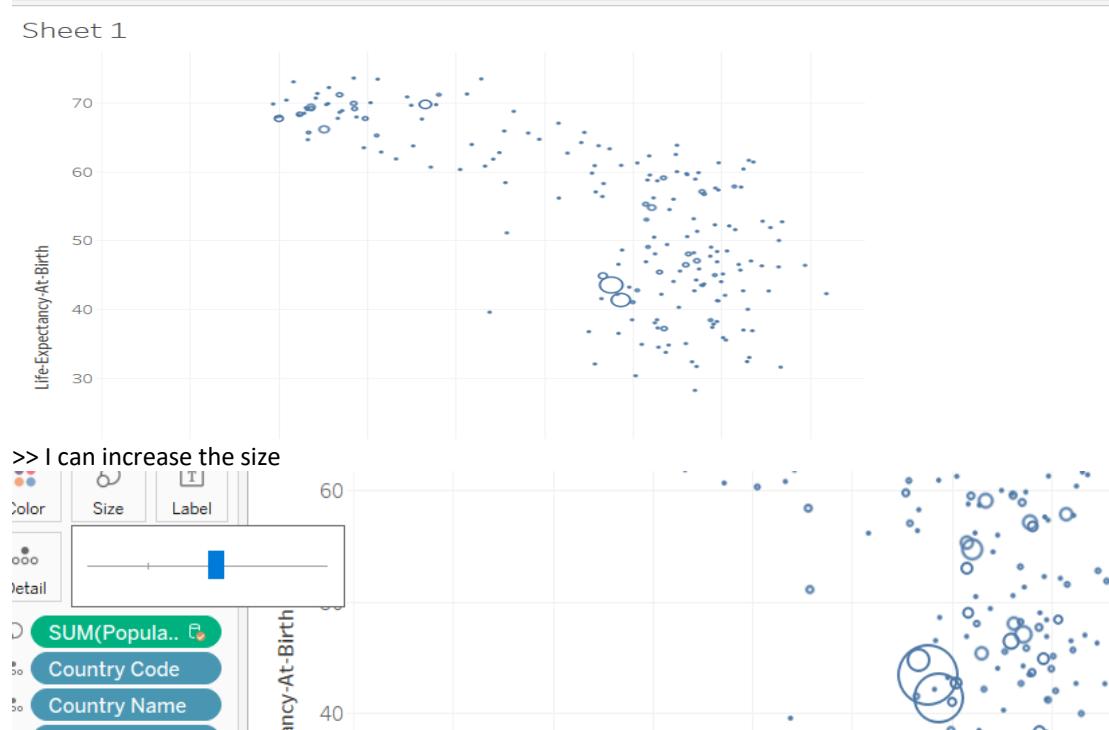
Click one



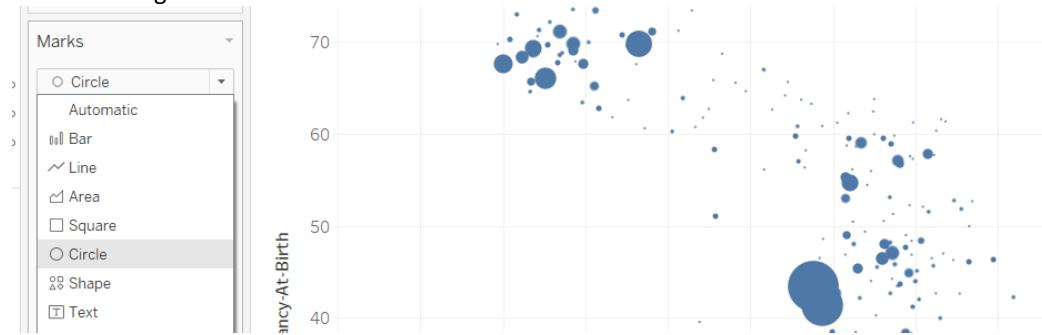
>> Now if we go to population we can see it already made a relationship

The screenshot shows the Tableau Data pane. The 'Data' tab is selected. It lists four data sources: 'Data (Country-Population)', 'Data (Fertility-Rate)', 'Data (Life-Expectancy-At-Birth)', and 'Metadata - Countries'. Below the tabs is a search bar and a 'Tables' section which lists 'Country Code', 'Country Name', and 'Year'.

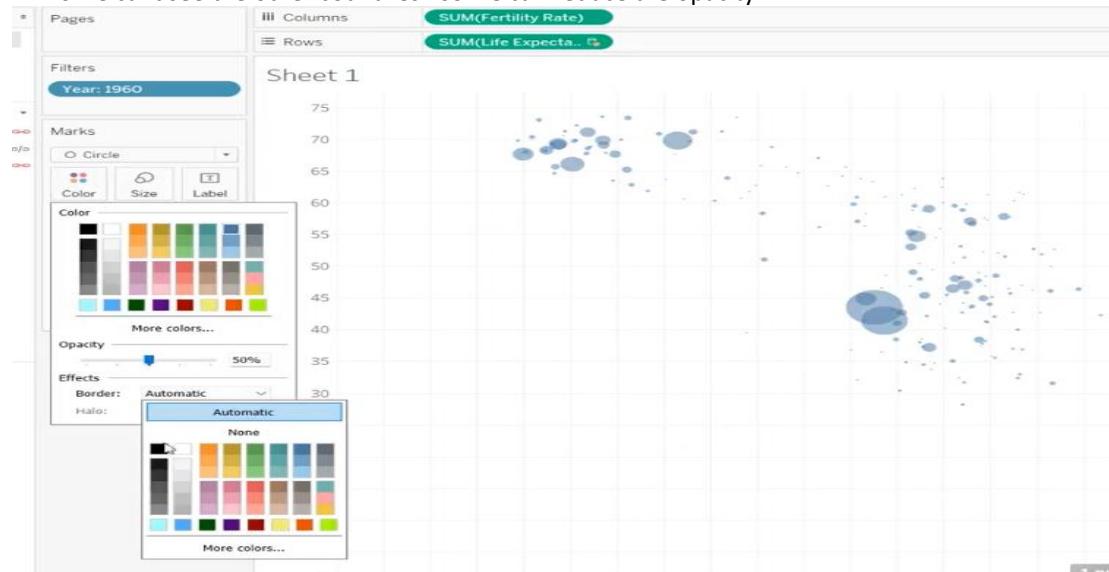
>> Put the population into the size



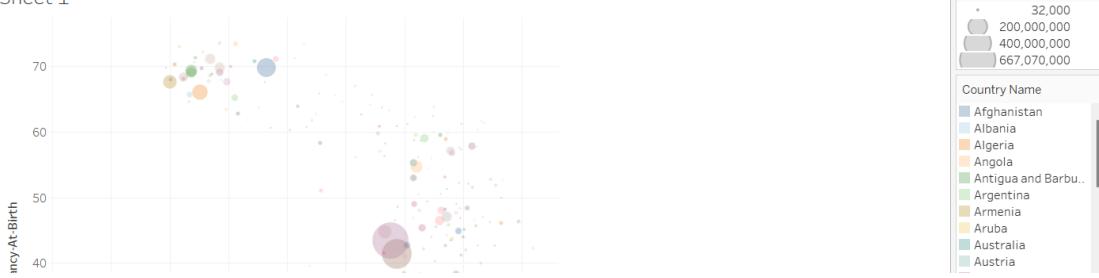
>> I can change it to circle



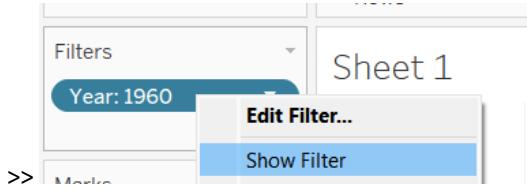
>> As we cant see the other countries ..so we can reduce the opacity



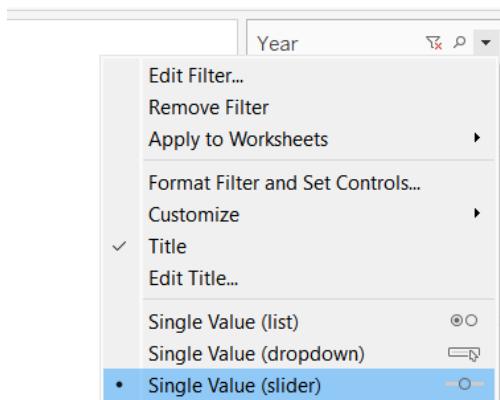
>> To change the country name color ..Drag the country name into colors
Sheet 1



>> Go to right ... Now click show filter

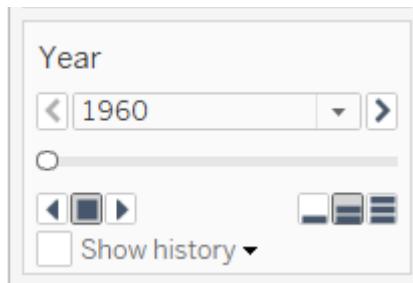
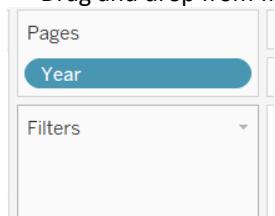


>> .click year drop-down button> Change it to slider



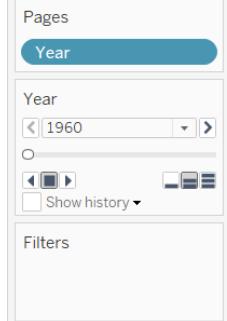
>> Now we want to animated this

>> Drag and drop from filter to page



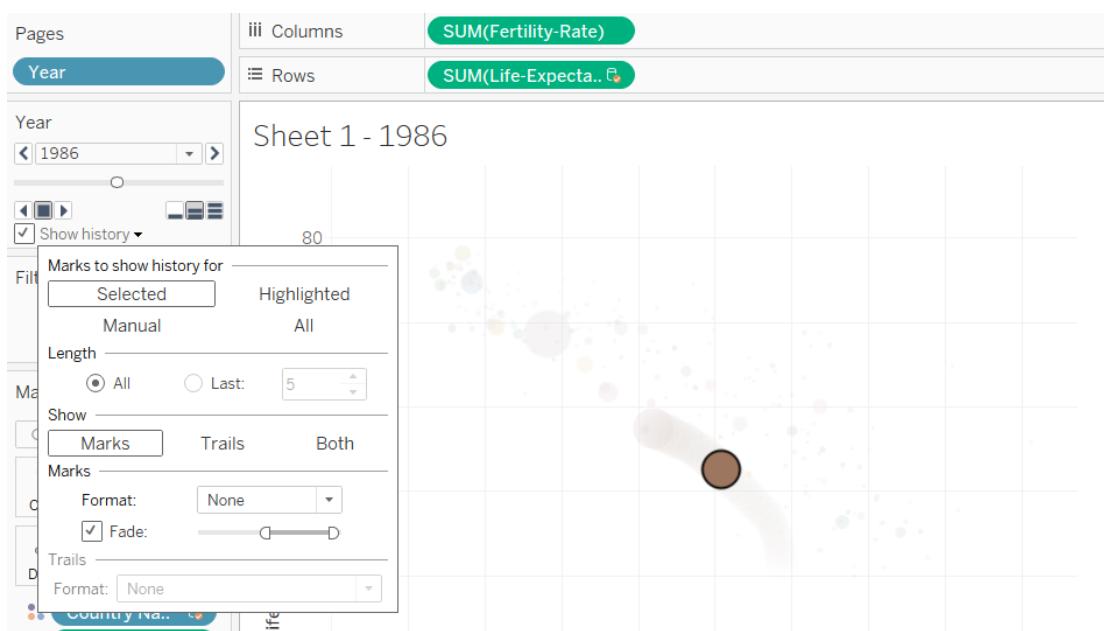
>> we can see a new panel has come

>> Drag it from the right side and drop it below the year

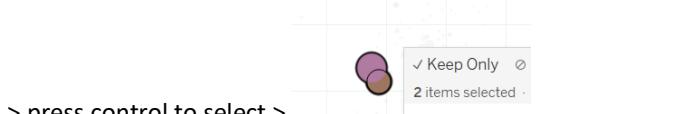


And it is animating now

>> so for showing one country animation we can do this

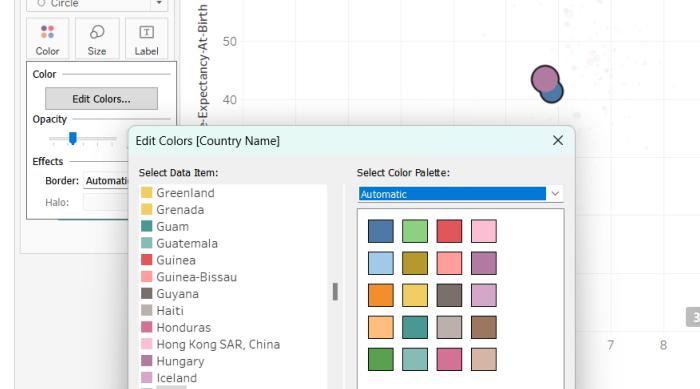


> If we want to compare two countries how they changed we can also do that



> press control to select >

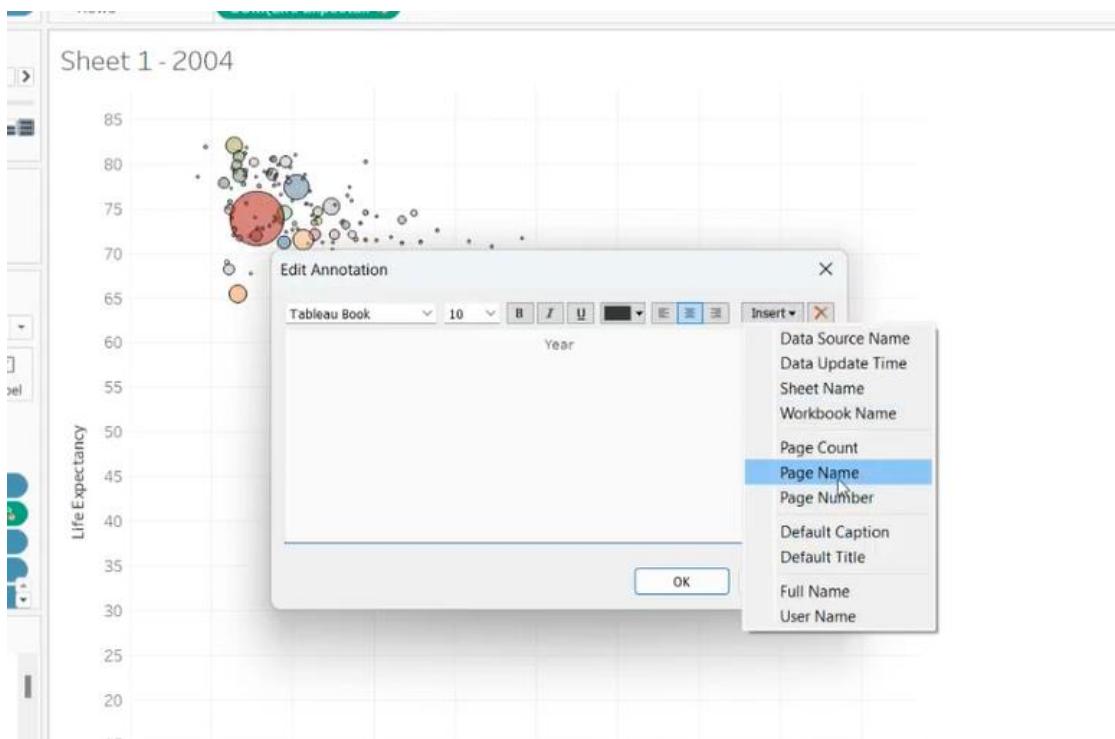
>> To understand better ...go edit color and change color of the country





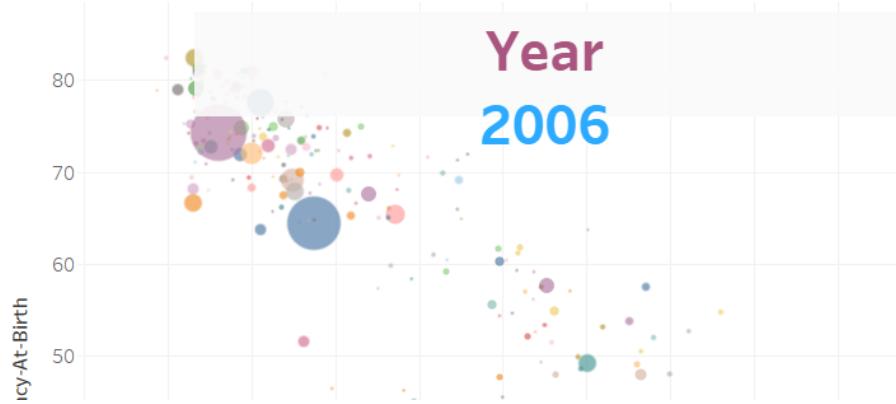
>> increase opacity going to color... if u want.. we can see the animation above.

>> Now right click > write the annotation area... and insert page name

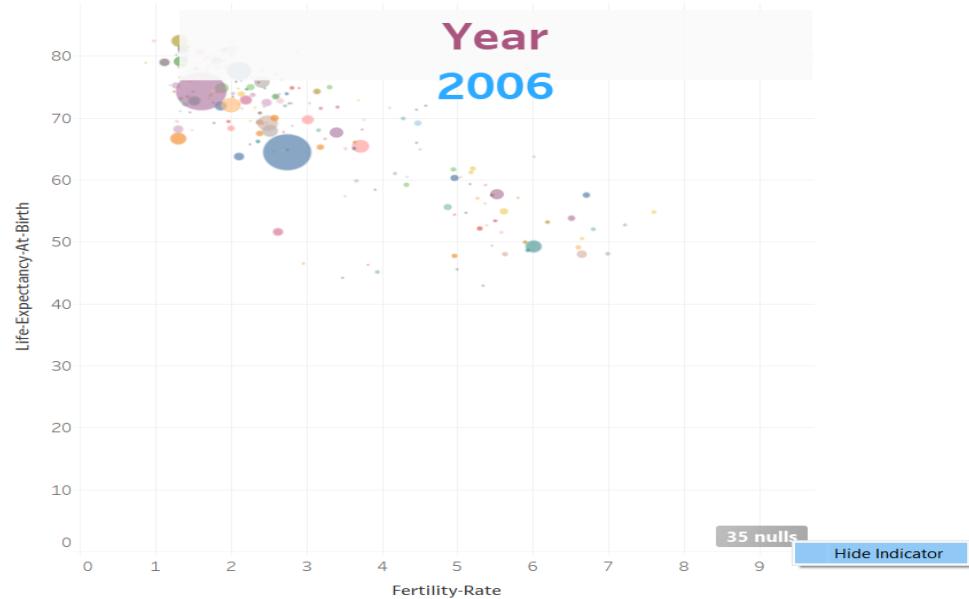


>>After the text is posted ..we can click format and change colors etc ..

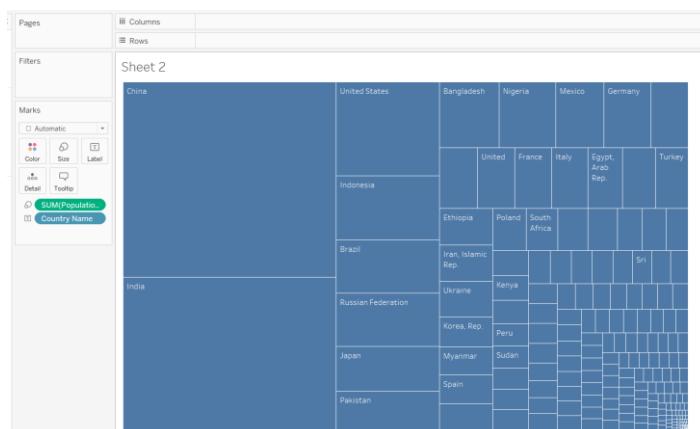
Sheet 1 - 2006



>> There are some countries that we don't have data so hide those null values which showing
Sheet 1 - 2006



>> We can look for which country has the maximum population
>> Create new sheet
>> From the population file ... >> take the country and put it into text / label
>> Take the population and put it into size





> put country name into colors



> we can change the background color.

> Format > fill > color



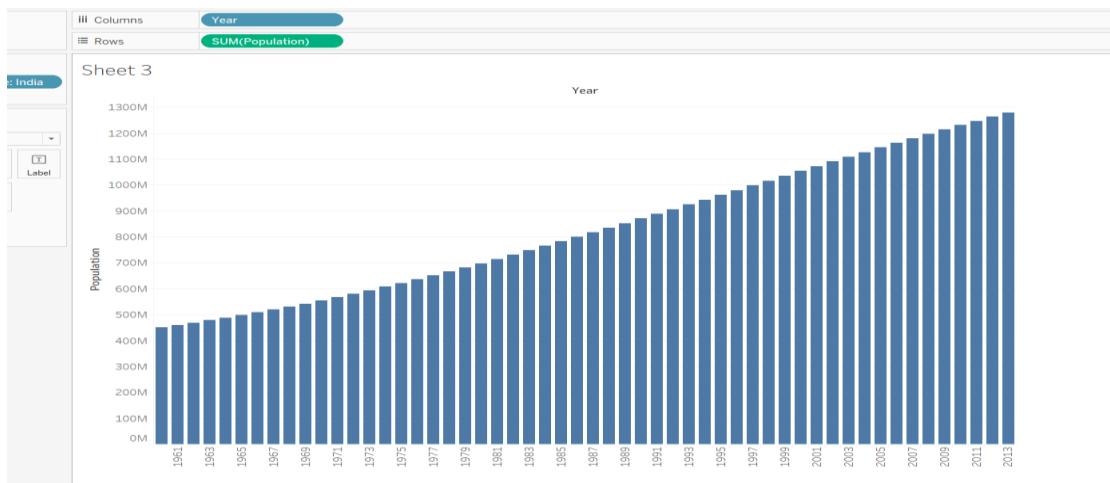
>>> We want to do the forecasting

>> Create a new sheet

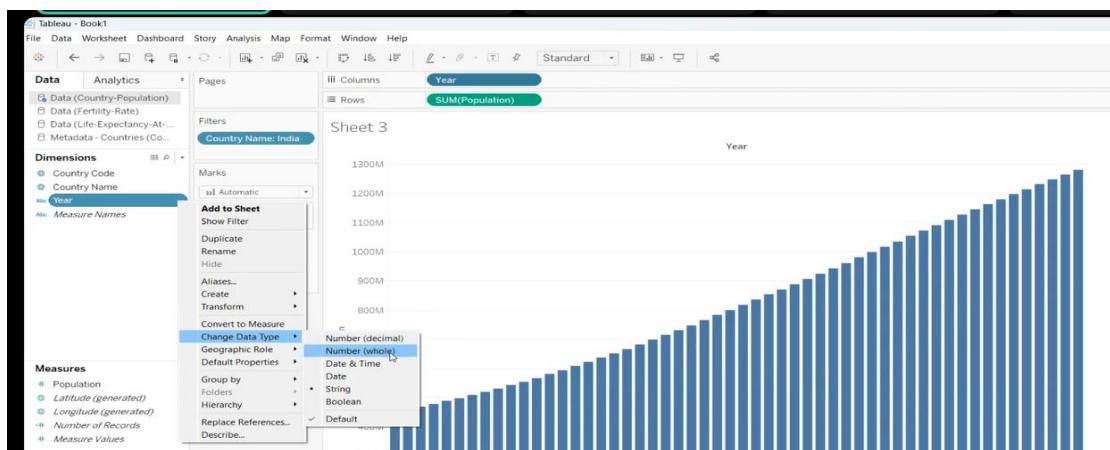
>> we take the country name into filter

>> select india

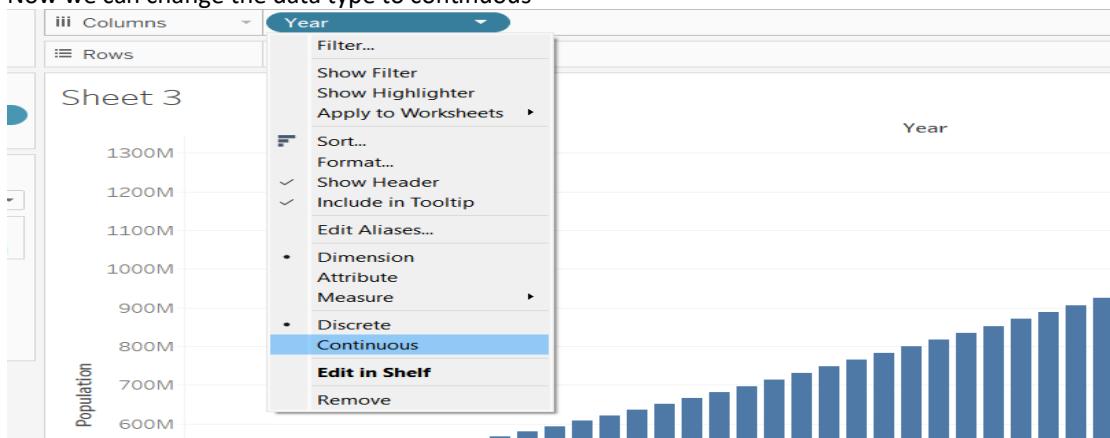
>> Take the year and population into row and column

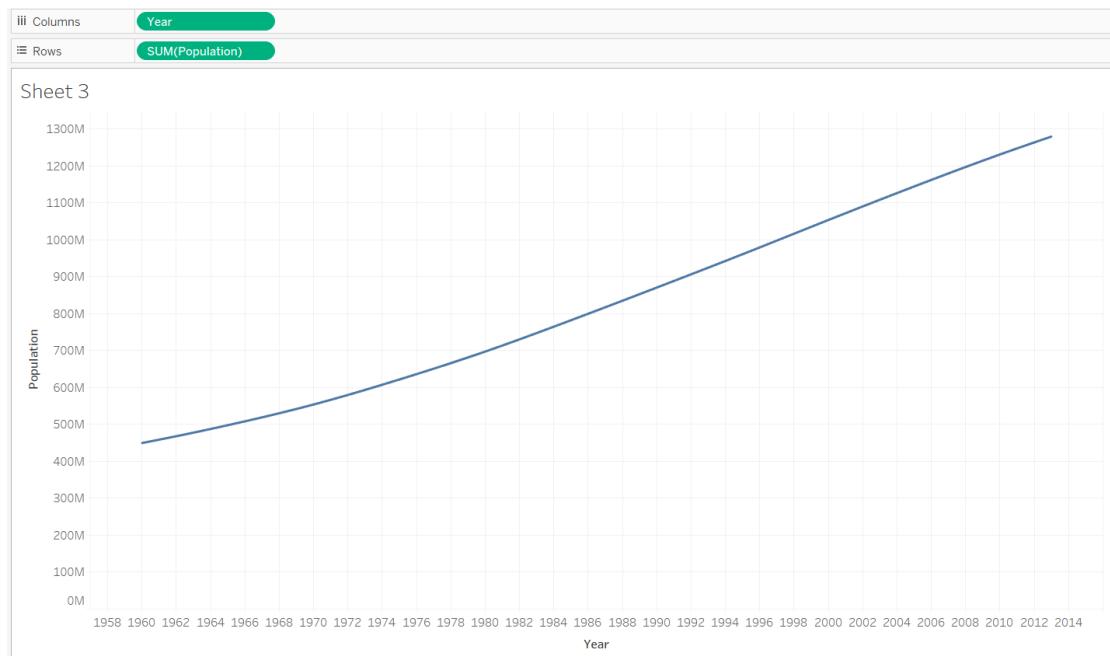


Year is discrete and here we can't change the data because data type of year is (abc) string to we need to convert it to integer.



Now we can change the data type to continuous





>> hard to read the data .. so we will change it to M. so we click on format and change it

SUM(Population) ▾

- Filter...
- Show Filter
- Apply to Worksheets ▾
- Format...**
- ✓ Show Header

Format SUM(Population) x

A Fields ▾

Axis Pane

Default

Font: Tableau Book, 9pt Alignment: Automatic Numbers: \$0.00B

Totals

Font: Alignment: Numbers: \$0.00B

Grand Total

Font: Alignment: Numbers: \$0.00B

Special Values (eg. NULL)

Text: (Blank) Marks: Show at Indicator

Pages

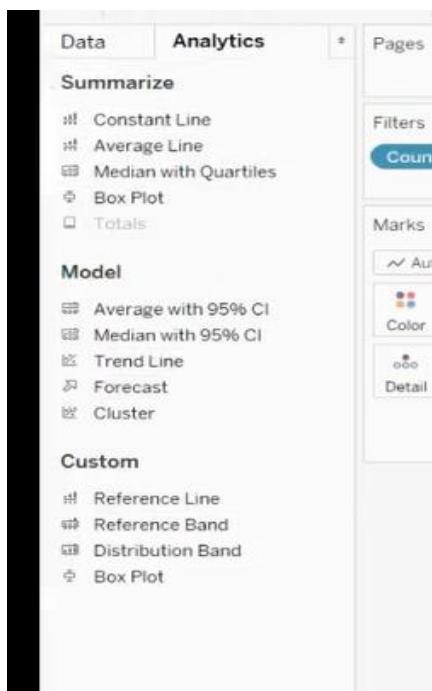
iii Columns Year

Rows SUM(Population)

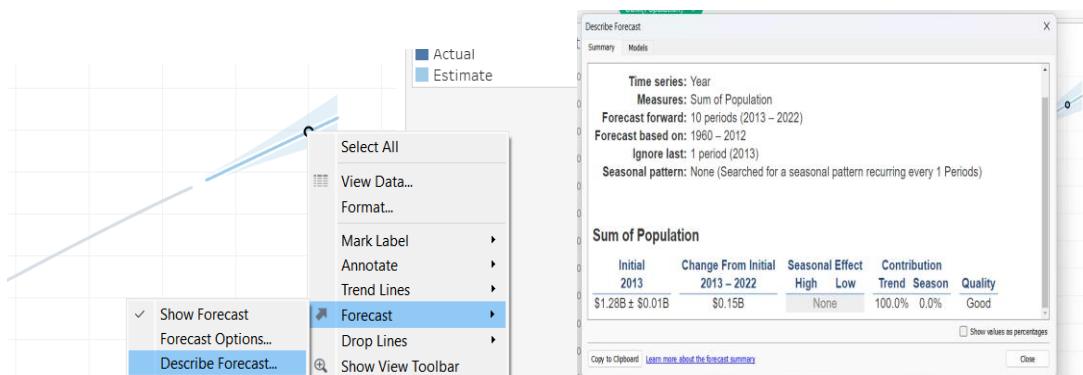
Sheet 3

The 'Format' dialog shows the specific settings for the population data. The 'Totals' section is configured to display billions of billions (Billions B) with two decimal places and commas as thousands separators. The chart on the right illustrates this setting, showing the population in billions for each year from 1958 to 2014, with a detailed view for the year 1961.

>> Now if we go to analytic ...it is showing the forecast and trend line



>> Drag and drop forecast

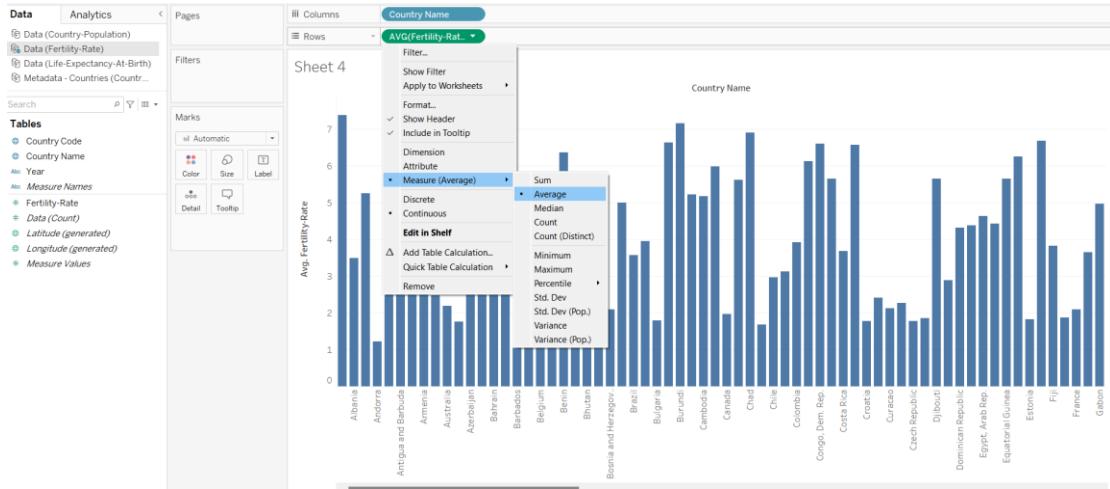


>> Now we will do clustering

>> create a new sheet

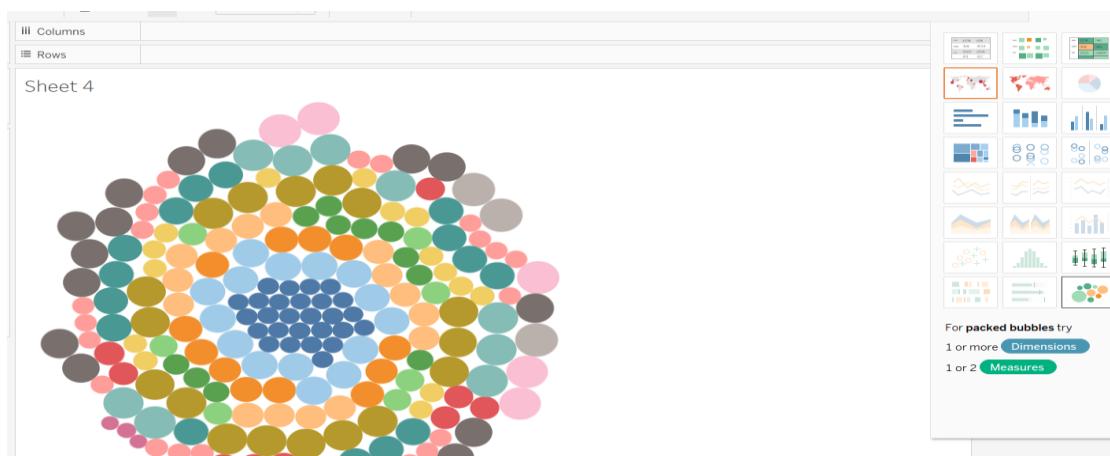
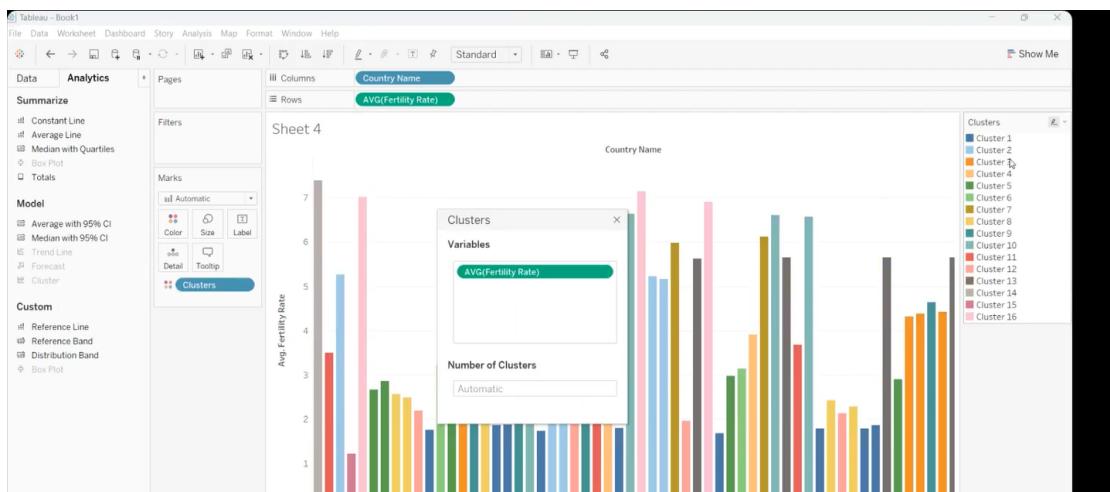
The customers who are purchasing more than 1000\$ or 500\$

We want to create a group of countries where the fertility rate is high ..

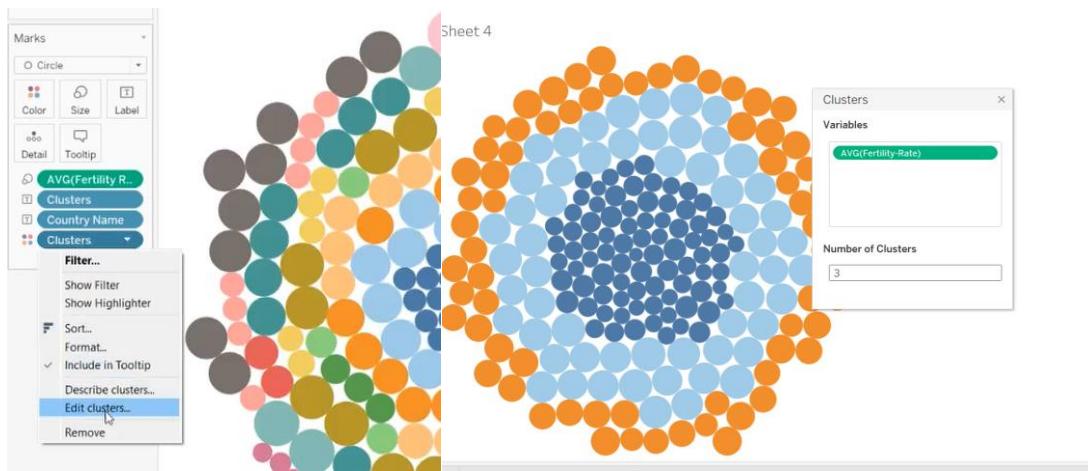


>> it is hard to read .. we want to create a group

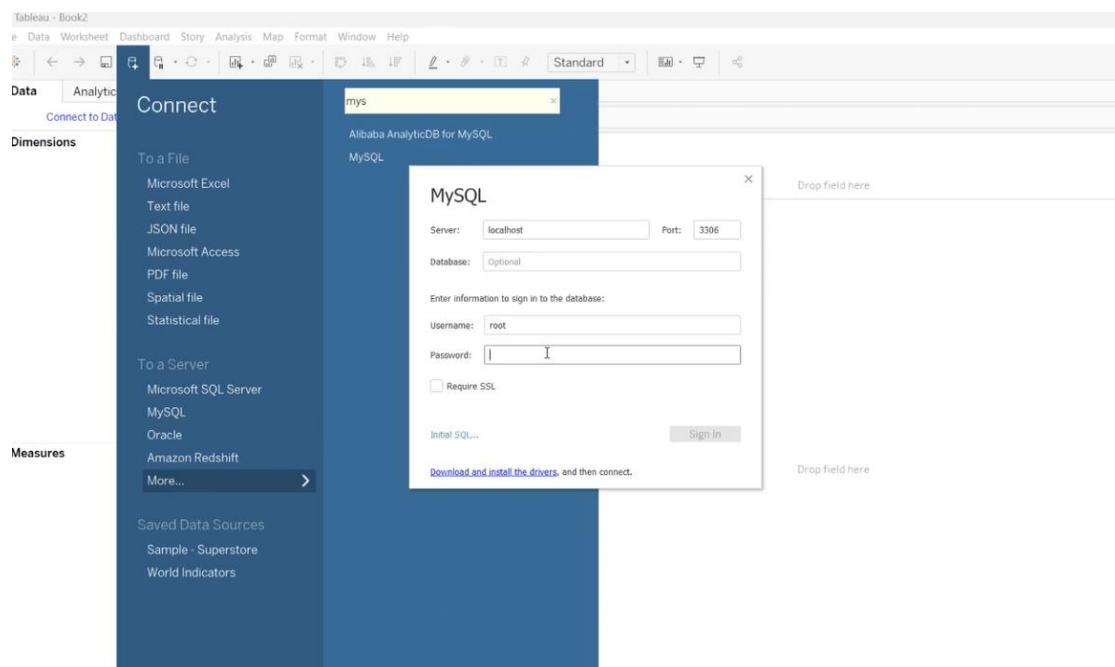
> We click on cluster. Drag and drop



Right click > edit cluster >> put the number



>>> for connecting with sql server



Download and install the driver