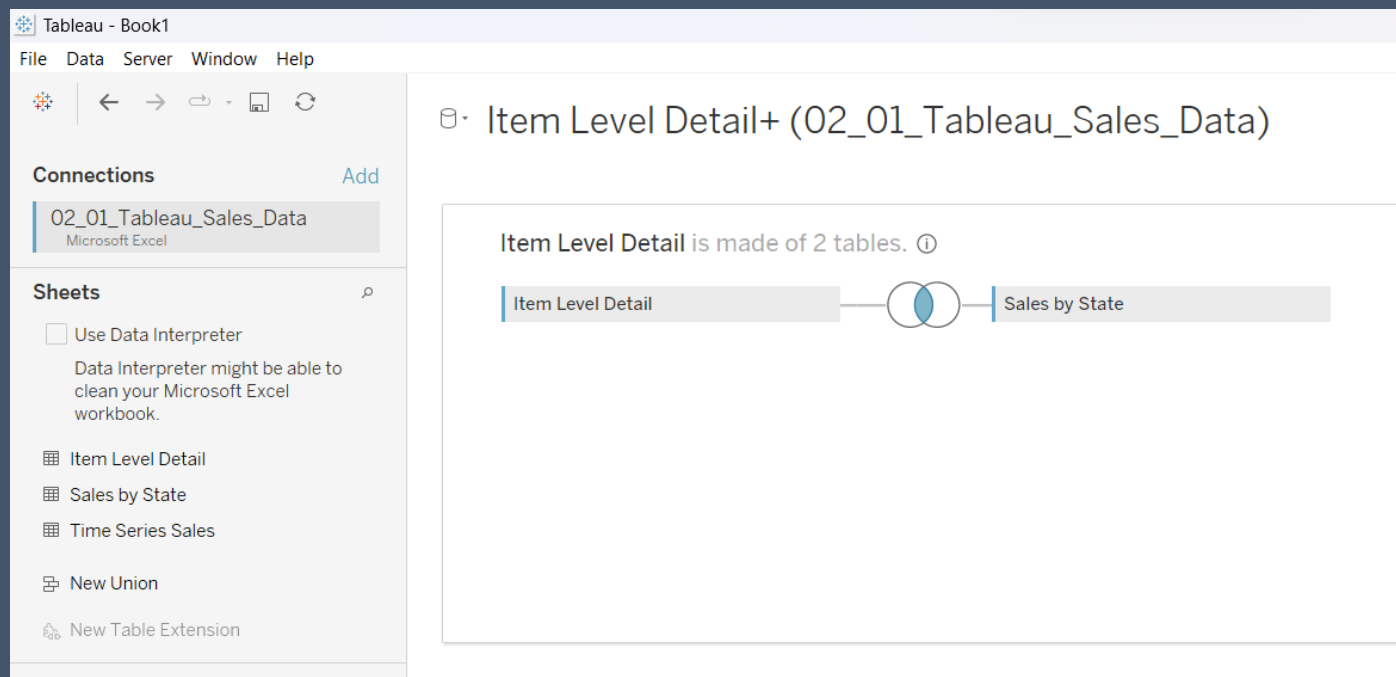
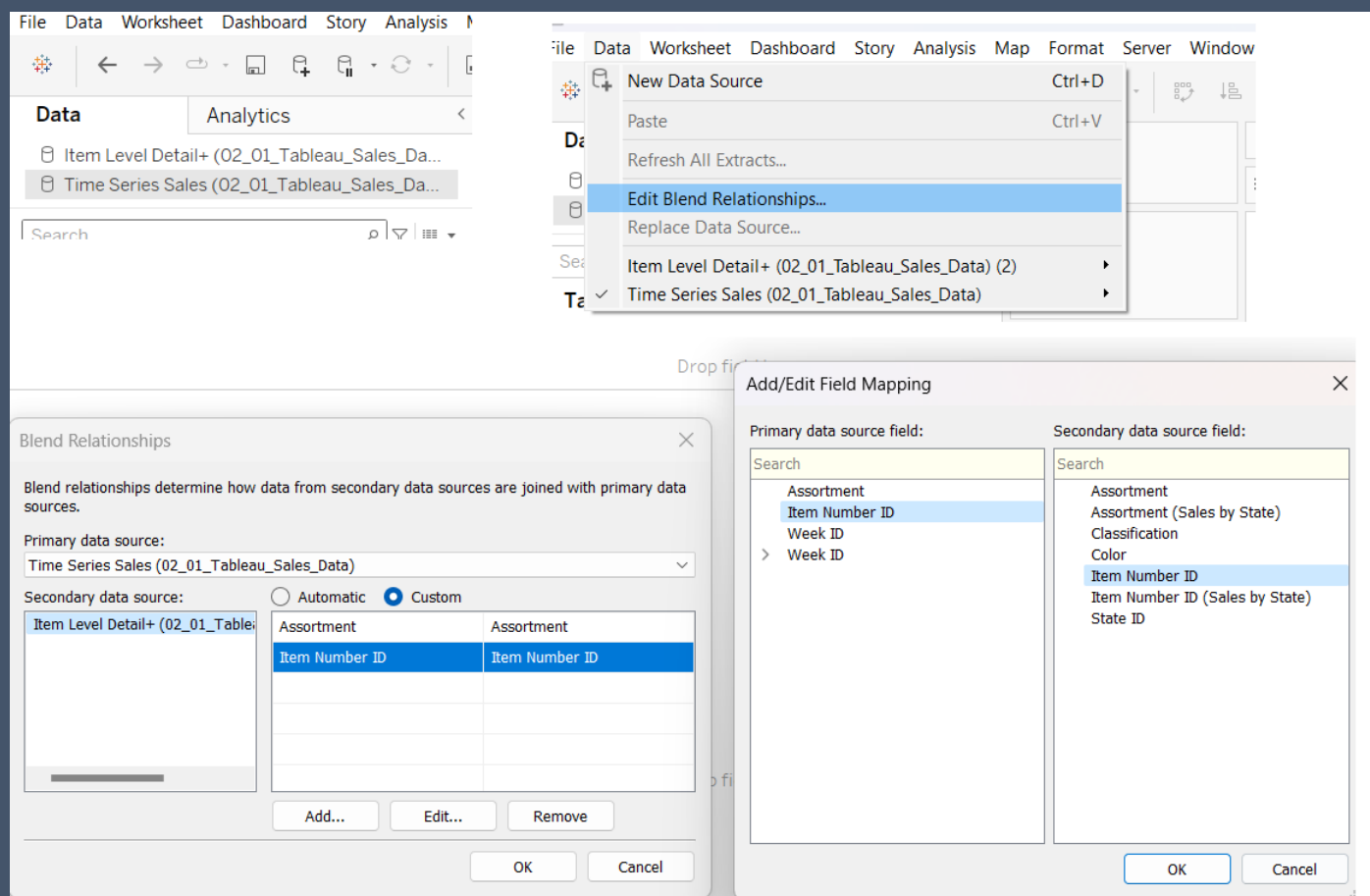


How to create an inner join in Tableau?

When we're at the data connections screen, we can combine two datasets by double-clicking ItemLevelDetail on the right screen, hover over SalesByState, click it, and drag it into the workspace, and it's created an inner join.

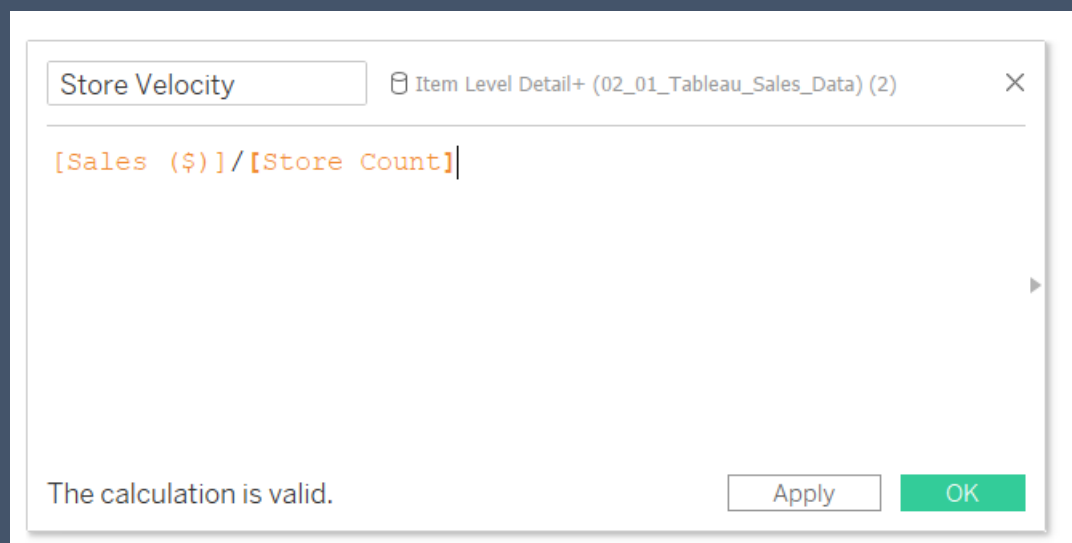


How to create data blend combining 2 tabs with a 3rd tab?



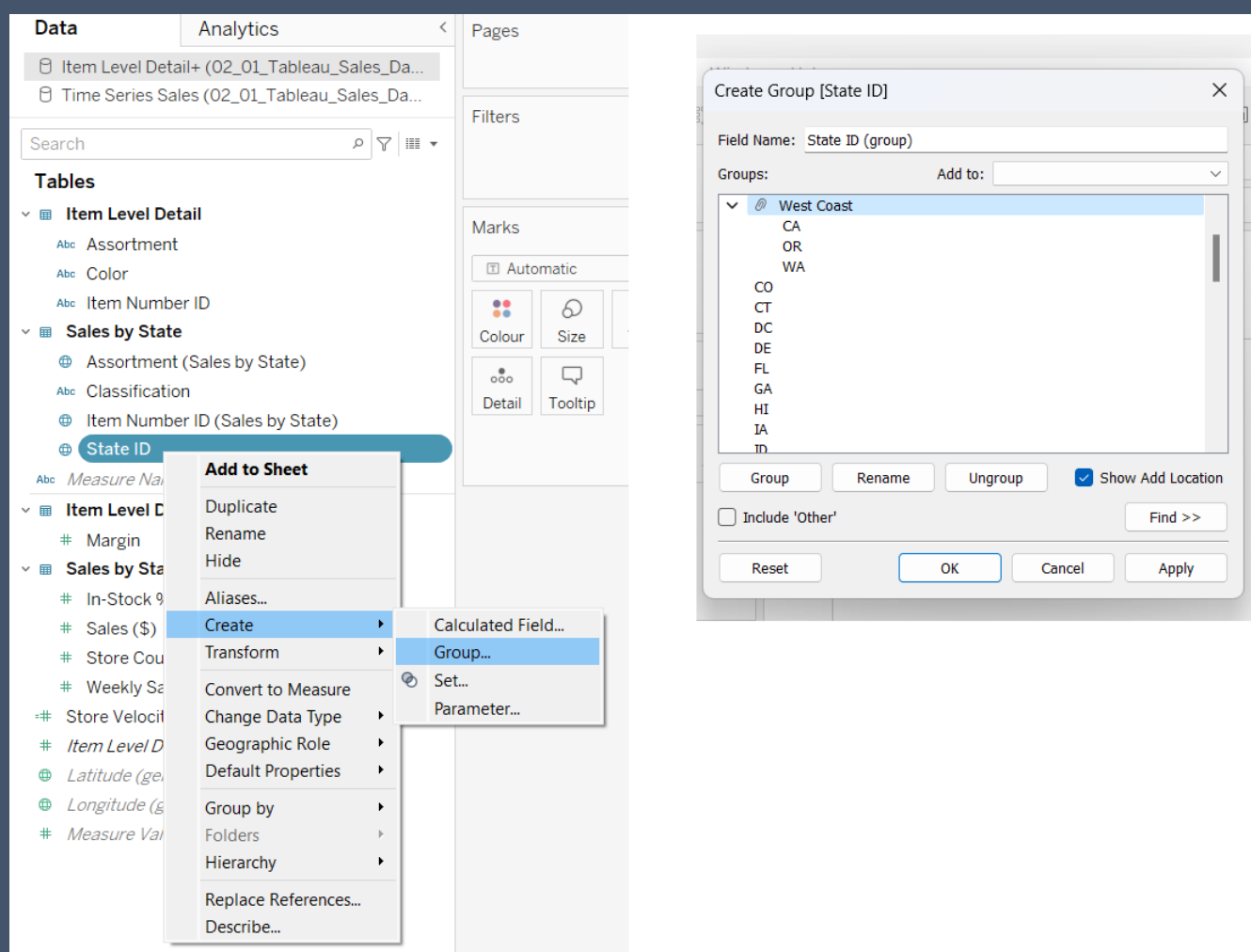
How to create a calculated column?

Go to the “Analysis tab” and select “create calculated field”.



How to create a group?

Groups make it easy to segment data. Select those states that you want to group, and hit group, then you can rename the field.



How to create a set?

Data | Analytics | Pages

Item Level Detail+ (02_01_Tableau_Sales_Da...
Time Series Sales (02_01_Tableau_Sales_Da...

Search

Tables

- Item Level Detail
 - Assortment
 - Color
 - Item Number ID
- Sales by S
 - Assortment
 - Classification
 - Item Number ID
 - State ID
 - Low Performers
 - State ID (geography)
 - Measure Name
- Item Level
 - Margin
- Sales by S
 - In-Stock
 - Sales (\$)
 - Store Count
 - Weekly Sales
 - Store Velocity

Filters

Marks

Automatic

Colour Size

Detail Tooltip

Create Set

Name: Low Performers

General Condition Top

☐ None

☒ By field:

In-Stock % Average

<= 0.96

Range of Values

Min: Load

Max:

☐ By formula:

Reset OK Cancel

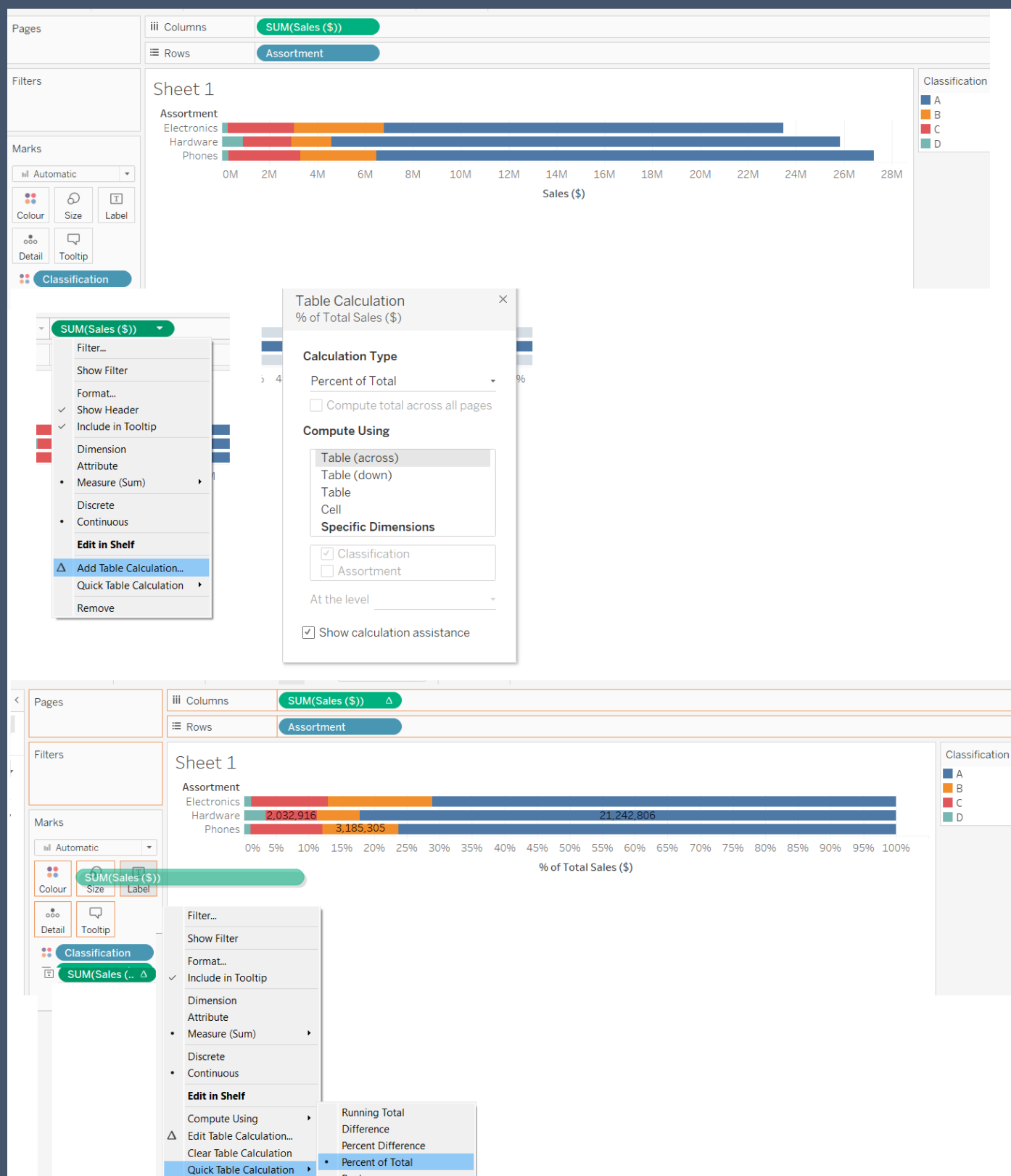
Sheet 1

In/Out of..	Item Nu..	
In	027	Abc
	110	Abc
	160	Abc
	211	Abc
	307	Abc
	312	Abc
	360	Abc
	437	Abc
	492	Abc
	531	Abc
	584	Abc
	668	Abc
	711	Abc
	796	Abc
	838	Abc
	843	Abc
	893	Abc
	907	Abc
	948	Abc
Out	000	Abc
	011	Abc

And here are the items that are not performing well.

Table calculations

We want to see a percentage of total. (Drag the “Sales \$” to the label to see the numbers on the chart)

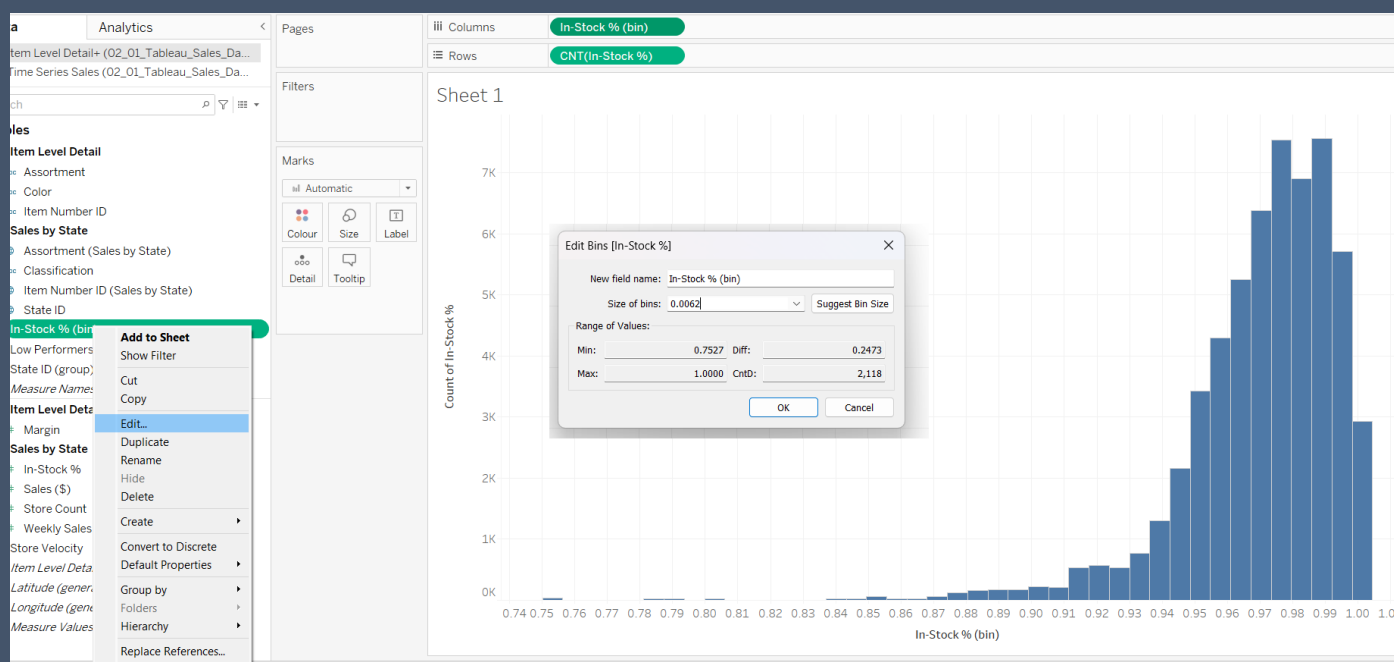


How to sort?

The screenshot shows the Tableau interface with a table of State IDs and Sales. The 'Sort' menu is open, and the 'Sort...' option is selected. The 'Sort [State ID]' dialog box is displayed, showing the 'Sort By' field as 'Sales (\$)' and the 'Sort Order' as 'Descending'.

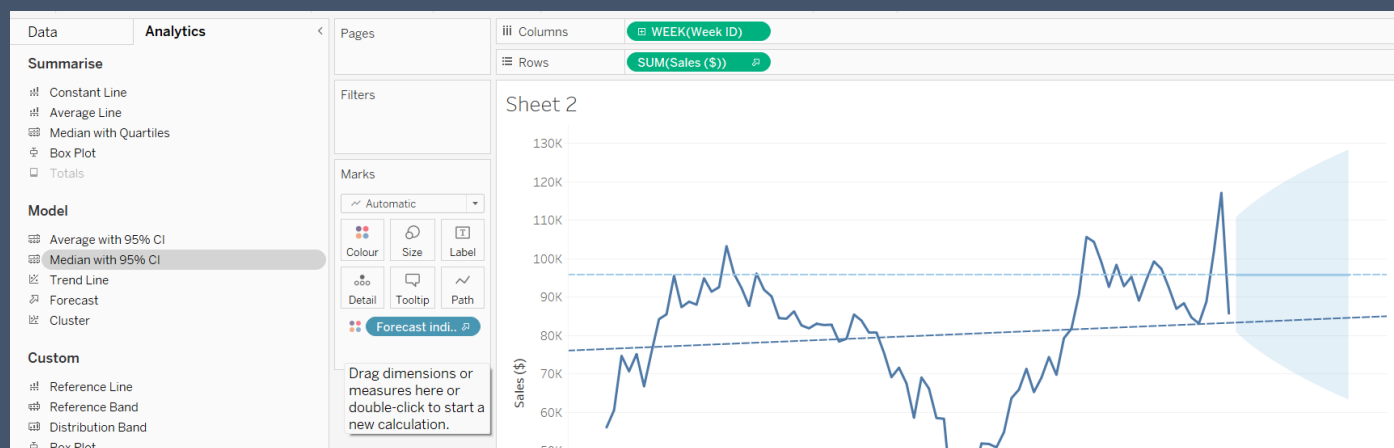
State ID	Sales (\$)
AK	246,431
AL	1,515,057
AR	750,400
AZ	712,719
CA	4,218,254
CO	1,177,974
CT	648,503
DC	49,874
DE	566,175
FL	6,174,970
GA	3,278,847
HI	166,991
IA	446,540

How to change the size of the bin in a histogram?

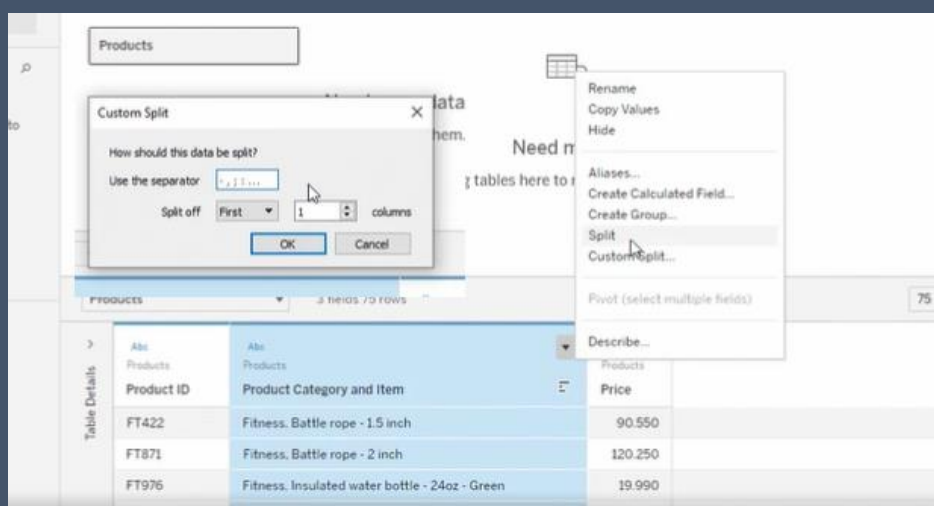


Analytics

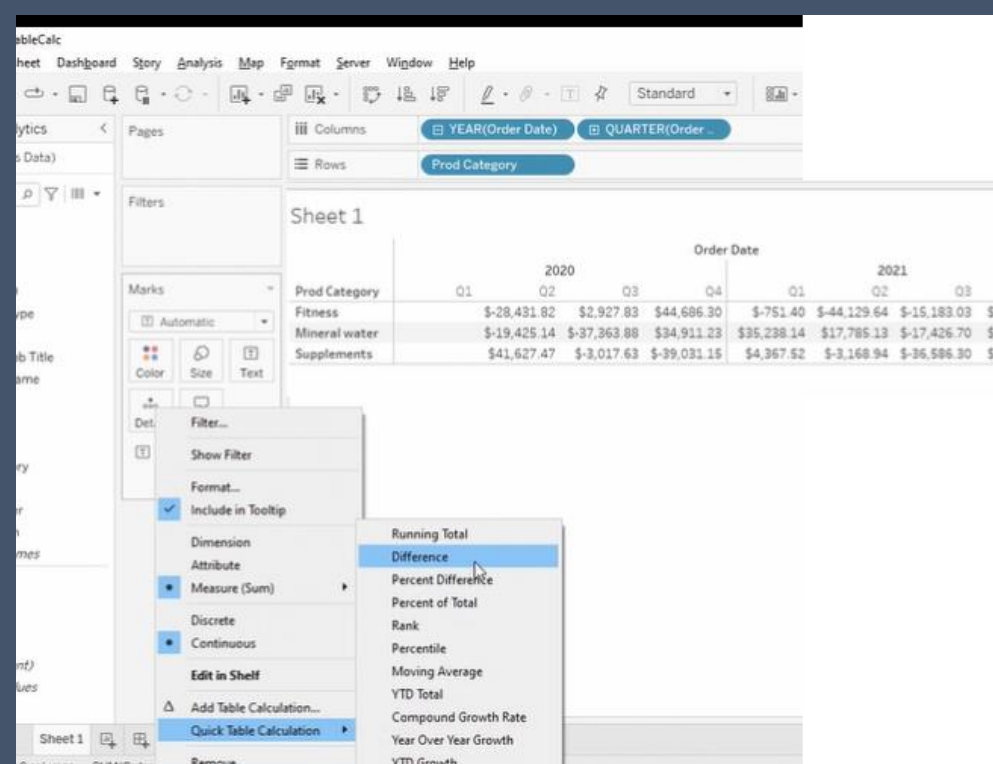
Double click the fields in the analytics pane to add them to the visualization



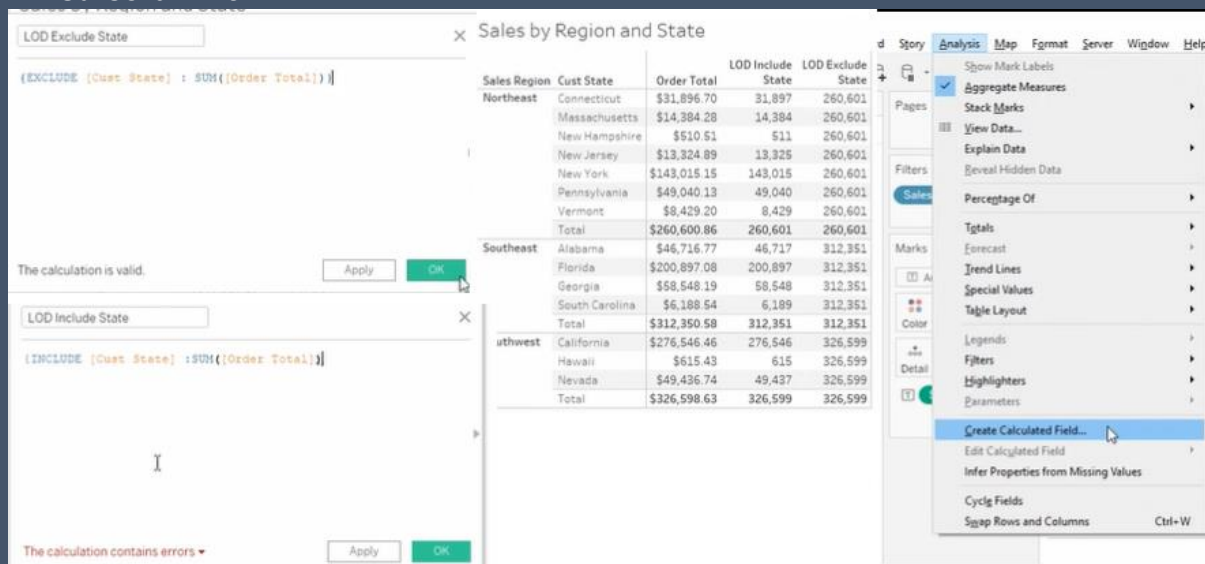
How to split columns?



How to create quick table calculations?



Fixed columns



How to filter?

The screenshot shows the Tableau interface with a table of 'Order Total by State' and a 'Filter [Cust State]' dialog box open.

Order Total by State

Cust State	Order Total
California	\$276,546.46
Florida	\$200,897.08
New York	\$143,015.15
Texas	\$321,048.11
Virginia	\$109,455.28

Filter [Cust State]

General Wildcard Condition Top

☐ None

☐ By field:

Order Total Sum

Range of Values

Min: Max: Load

☒ By formula:

[Order Total] > 100000

Reset OK Cancel Apply

Values in a table

The screenshot shows the Tableau interface with a table of 'Summary Sheet' and the 'Percentage Of' context menu open.

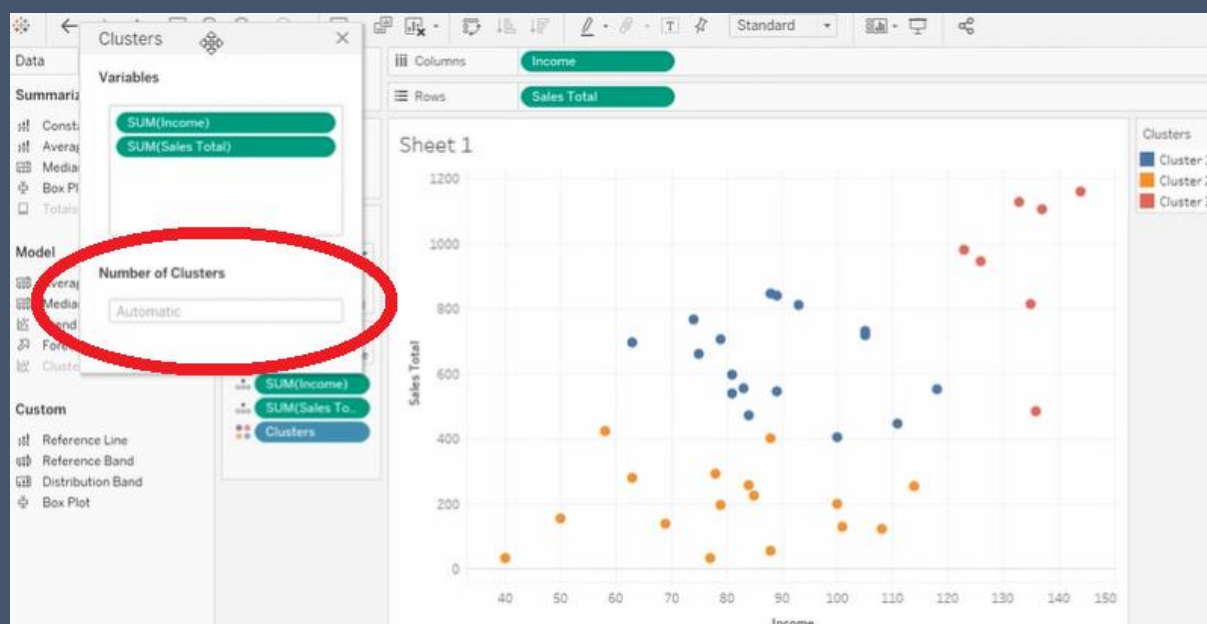
Summary Sheet

Prod Category	Percentage
Fitness	19.18%
Mineral water	54.60%
Supplements	26.22%

Percentage Of

- None
- Table
- Column
- Row
- Pane
- Row in Pane
- Column in Pane
- Cell

Change the number of data clusters



Create a dashboard



Create a filter action

Dashboard | Story | Analysis | Map | Format | Server | Window

New Dashboard

Device Layouts

Show Grid

Grid Options...

Format

Copy Selected Dashboard Item

Copy Image

Export Image...

Clear

Show Title

Actions... **Ctrl+Shift+D**

Auto Update

Run Update

Add Phone Layouts to Existing Dashboards

Add Phone Layouts to New Dashboards

Blank

Navigation

Download

Extension

Ask Data

Employee Job Title

Sales Associate	\$186,848.54
Sales Associate I	\$452,513.01
Sales Associate II	\$329,721.03
Sales Associate III	\$164,976.82
Sales Associate IV	\$111,201.06
Sales Associate V	\$56,972.66
Sales Representative	\$473,912.56

Sales by Region

Sales Region

Order Total

Sales by Category

Mineral water

Fitness

Supplements

Sales by Quarter

Order Total

Sales by Job Title

Employee Job Title	Order Total
Sales Associate	\$186,848.54
Sales Associate I	\$452,513.01
Sales Associate II	\$329,721.03
Sales Associate III	\$164,976.82
Sales Associate IV	\$111,201.06
Sales Associate V	\$56,972.66
Sales Representative	\$473,912.56
Senior Sales Associate	\$301,596.22

Actions

Actions let you create interactive relationships between data, dashboard objects, other worksheets, and the web.

Show actions for

☒ This workbook ☐ This sheet

Name	Run On	Source	Fields
Filter...			
Highlight...			
Go to URL...			
Go to Sheet...			
Change Parameter...			
Change Set Values...			

Add Action

Edit

Remove

Cancel

OK

Add Filter Action

Name

FilterByJob

Insert

Source Sheets

Dashboard 1

☒ Sales by Category

☒ Sales by Job Title

☒ Sales by Quarter

☒ Sales by Region

Run action on

☐ Hover

☐ Select

☒ Menu

☐ Single-select only

Target Sheets

Dashboard 1

☒ Sales by Category

☒ Sales by Job Title

☒ Sales by Quarter

☒ Sales by Region

Clearing the selection will

☒ Keep filtered values

☐ Show all values

☐ Exclude all values

Filter

☒ All fields ☐ Selected fields

Source Field	Target Data Source	Target Field
Click to add		

Remove

Cancel

OK

How to create a highlight?

Actions

Actions let you create interactive relationships between data, dashboard objects, other worksheets, and the web.

Show actions for:

- ☒ This workbook
- ☐ This sheet

Name	Run On	Source	Fields
HighlightByJob			

Add Filter Action

Name: HighlightByJob

Source Sheets:

- ☒ Dashboard 1
- ☒ Sales by Category
- ☒ Sales by Job Title
- ☒ Sales by Region

Run action on:

- ☐ Hover
- ☒ Select
- ☐ Menu

Target Sheets:

- ☒ Dashboard 1
- ☒ Sales by Category
- ☒ Sales by Job Title
- ☒ Sales by Region

Target Highlighting:

- ☒ All Fields
- ☐ Dates and Times
- ☐ Selected Fields

Employee Job Title

Prod Category

Employee Job Title	Fitness	Mineral water	Supplements
Sales Associate	\$32,701.78	\$121,194.15	\$32,950.81
Sales Associate I	\$108,088.66	\$208,478.73	\$135,845.82
Sales Associate II	\$34,755.58	\$186,973.34	\$107,991.81
Sales Associate III	\$75,968.82	\$78,777.08	\$58,230.12
Sales Associate IV	\$16,880.80	\$69,908.78	\$34,433.48
Sales Associate V	\$18,928.79	\$18,436.30	\$15,210.67
Sales Representative	\$99,816.33	\$263,032.51	\$111,063.72
Senior Sales Associate	\$80,630.15	\$110,394.92	\$40,679.15
Senior Sales Representati...	\$71,406.88	\$198,485.42	\$82,043.32

Sales by Job Title

Employee Job Title	Order Total
Sales Associate	\$138,948.54
Sales Associate I	\$402,818.02
Sales Associate II	\$329,721.03
Sales Associate III	\$184,876.82
Sales Associate IV	\$111,201.06
Sales Associate V	\$55,972.06
Sales Representative	\$473,912.56
Senior Sales Associate	\$301,536.02

Sales by Category

Prod Category / Employee Job Title

Employee Job Title

- Sales Associate
- Sales Associate I
- Sales Associate II
- Sales Associate III
- Sales Associate IV
- Sales Associate V
- Sales Representative
- Senior Sales Associate
- Senior Sales Represe...

How to create a parameter action?

Create Parameter

Name: Refine

Properties:

- Data type: Float
- Current value: 1
- Value when workbook opens: Current value
- Display format: 1
- Allowable values: ☒ All ☐ List ☐ Range

Actions

Actions let you create interactive relationships between data, dashboard objects, other worksheets, and the web.

Show actions for:

- ☒ This workbook
- ☐ This sheet

Name	Run On	Source	Fields
Refine Parameter			

Add Parameter Action

Name: Refine Parameter

Source Sheets:

- ☒ Sales by Month

Run action on:

- ☐ Hover
- ☒ Select
- ☐ Menu

Target Parameter:

- ☒ Refine

Clearing the selection will:

- ☒ Keep current value
- ☐ Set value to:

Source Field: SUM(Order Total)

Aggregation: Sum

Sales by Month

Order Total

Month of Order Date

Time difference

Running Sum

Order ID	Order Date	Ship Date	
AE-2011-9160	03/10/2011	07/10/2011	Abc
AE-2013-1130	14/10/2013	14/10/2013	Abc
AE-2013-1530	31/12/2013	03/01/2014	Abc
AE-2014-2840	05/11/2014	08/11/2014	Abc
AE-2014-3830	13/12/2014	18/12/2014	Abc
AE-2014-4120	07/03/2014	11/03/2014	Abc
AG-2011-60	13/08/2011	18/08/2011	Abc
AG-2011-380	03/03/2011	08/03/2011	Abc
AG-2011-450	07/11/2011	11/11/2011	A
AG-2011-500	23/11/2011	27/11/2011	A
AG-2011-1070	10/01/2011	15/01/2011	A
AG-2011-1390	16/06/2011	21/06/2011	A
AG-2011-1440	15/12/2011	20/12/2011	A
AG-2011-2040	01/01/2011	06/01/2011	A
AG-2011-3090	13/08/2011	17/08/2011	A
AG-2011-3130	11/03/2011	16/03/2011	A
AG-2011-4410	02/11/2011	04/11/2011	A
AG-2011-4450	15/06/2011	15/06/2011	A
AG-2011-4560	20/12/2011	27/12/2011	A
AG-2011-7230	07/01/2011	11/01/2011	A
AG-2011-7710	24/05/2011	27/05/2011	A
AG-2011-8180	25/02/2011	25/02/2011	A
AG-2011-8390	19/07/2011	24/07/2011	A
AG-2011-8930	26/12/2011	27/12/2011	A
AG-2011-9060	20/12/2011	25/12/2011	A
AG-2011-9610	22/04/2011	25/04/2011	A
AG-2011-9670	22/12/2011	24/12/2011	A
AG-2011-9890	26/06/2011	02/07/2011	A
AG-2012-170	30/11/2012	03/12/2012	A
AG-2012-1940	31/07/2012	04/08/2012	A

Duration in Days

DATEDIFF('day', [Order Date], [Ship Date])

The calculation is valid.

Apply OK

AI

date

DATE

DATEADD

DATEDIFF

DATENAME

DATEPARSE

DATEPART

DATETIME

DATETRUNC

ISDATE

MAKEDATE

MAKEDATETIME

DATEDIFF(date_part, start_date, end_date, [start_of_week])

Returns the difference between two dates where start_date is subtracted from end_date. The difference is expressed in units of date_part. If start_of_week is omitted, the week start day is determined by the start day configured for the data source.

Example: DATEDIFF('month', #2004-07-15#, #2004-04-03#, 'sunday') = -3

IF

Sheet 1

Sub-Categories

Accessories

Appliances

Art

Binders

Bookcases

Chairs

Copiers

Envelopes

Fasteners

Furnishings

Labels

Machines

Paper

Phones

Storage

Supplies

Tables

Sales

Profitable Sale?

IF [Profit]>0 THEN 'Profit'
ELSEIF [Profit] = 0 THEN 'Even'
ELSE 'Loss'
END

The calculation is valid.

Apply OK

AI

Enter search text

DIV

ELSE

ELSEIF

END

ENDSWITH

EXCLUDE

EXP

FIND

FINDNTH

FIRST

FIXED

FLOAT

FLOOR

FULLNAME

HEXBIN

HEXBIN

IF

IF <expr> THEN <then> [ELSEIF <expr2> THEN <then2> ...] [ELSE <else>] END

Tests a series of expressions returning the <then> value for the first true <expr>.

Example: IF [Profit] > 0 THEN 'Profitable' ELSEIF [Profit] = 0 THEN 'Breakeven' ELSE 'Loss' END

R script in Tableau

There also need to be install an R package Rserve

