

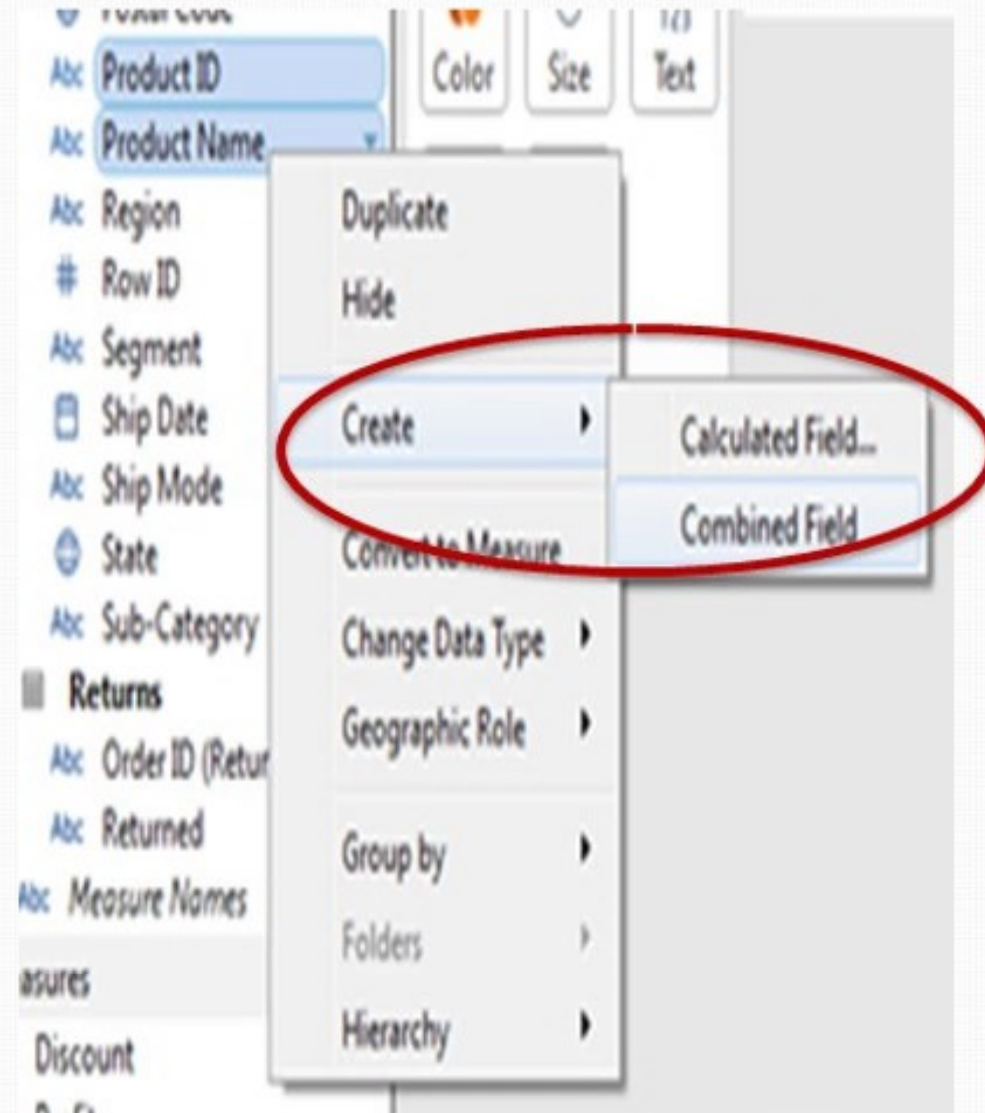


## ORGANISE YOUR DATA-1

Combined Fields, Sorting,  
Hierarchies, Alias, Drill

# Combine Field

- Combine fields are used to create a cross product of members from different dimensions. You can combine dimensions if you want to encode a data view using multiple dimensions.
- Combine fields are not for measures.
- To combine the fields, select **multiple dimensions** in the Data pane and **right-click** the fields and select **Create > Combined Field**.





# How Combined Field Works

- The two dimensions are combined into a new dimension. The name of the field is automatically created from the names of the original fields.
- When you use the new field in a view, a header is created for each combination of the two original dimensions.



# Combine Field- Hands On

- Exercise 1\*- Name the city and state having maximum Average profit.
- Exercise 2\*- Show the Sum of Profit along with the above.



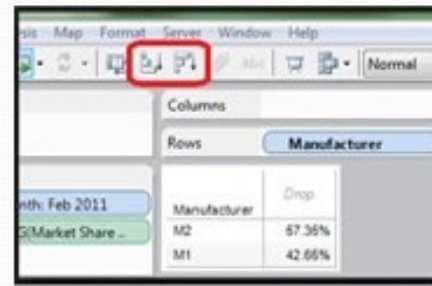


# Combine Field- Hands On

Pages	Columns
	Rows City & State (Combin..
Filters	
Marks	
Abc Automatic	
Color	
Size	
Abc 123 Text	
Detail	
Tooltip	
Abc 123	
AVG(Profit)	

City & State (Combined)	
Lafayette, Indiana	748
Jamestown, New York	643
Independence, Missouri	488
Minneapolis, Minnesota	297
Appleton, Wisconsin	277
Morristown, New Jersey	263
Burbank, California	255
Lehi, Utah	226
Beverly, Massachusetts	218
Warwick, Rhode Island	213
Burlington, Vermont	204
Bellingham, Washington	204
Great Falls, Montana	198
Mobile, Alabama	198
Midland, Michigan	191
Yonkers, New York	185
Florence, Kentucky	184
Atlanta, Georgia	179
Des Moines, Washington	179
Providence, Rhode Island	178
Columbia, Maryland	164
Dubuque, Iowa	159
Sacramento, California	159
Saint Cloud, Minnesota	157

# Sorting data



In Tableau, sorting a data view means arranging dimensions in a specified order. Sorting helps you to Visualize and understand your data better, Organize and find the data and make effective decisions.

Tableau supports two types of sorting.

## 1) Computed Sorting

## 2) Manual Sorting





# Ways of Sorting Data

- **Computed Sorting** uses programmatic rule to sorts the view such as sorting the view in alphabetically or from lowest to highest.
- **Manual Sorting** allows you to reorganize the dimensions in that table and can be implemented only in distinct fields with distinct measures.



# COMPUTED SORTING OF Dimensions

Sorting dimensions in a computed manner follows these rules:

- Discrete field can be sorted after it has been placed on a shelf (except the Filters shelf).
- Each dimension that appears on a worksheet can be sorted independently of any other dimension.
- Sorted fields are identified by a sort icon on the right side of the field.

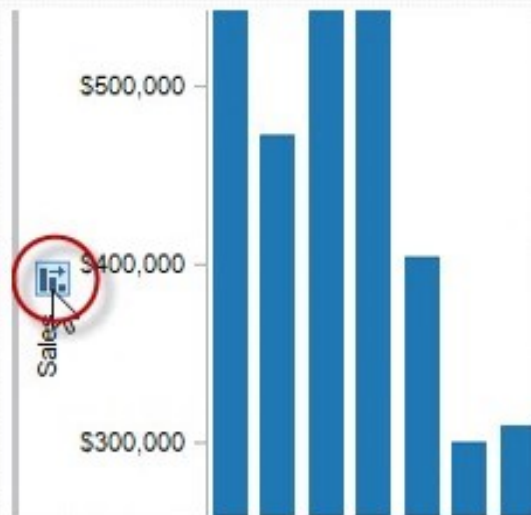




# ways of computed sorting



## Sorting on Axis

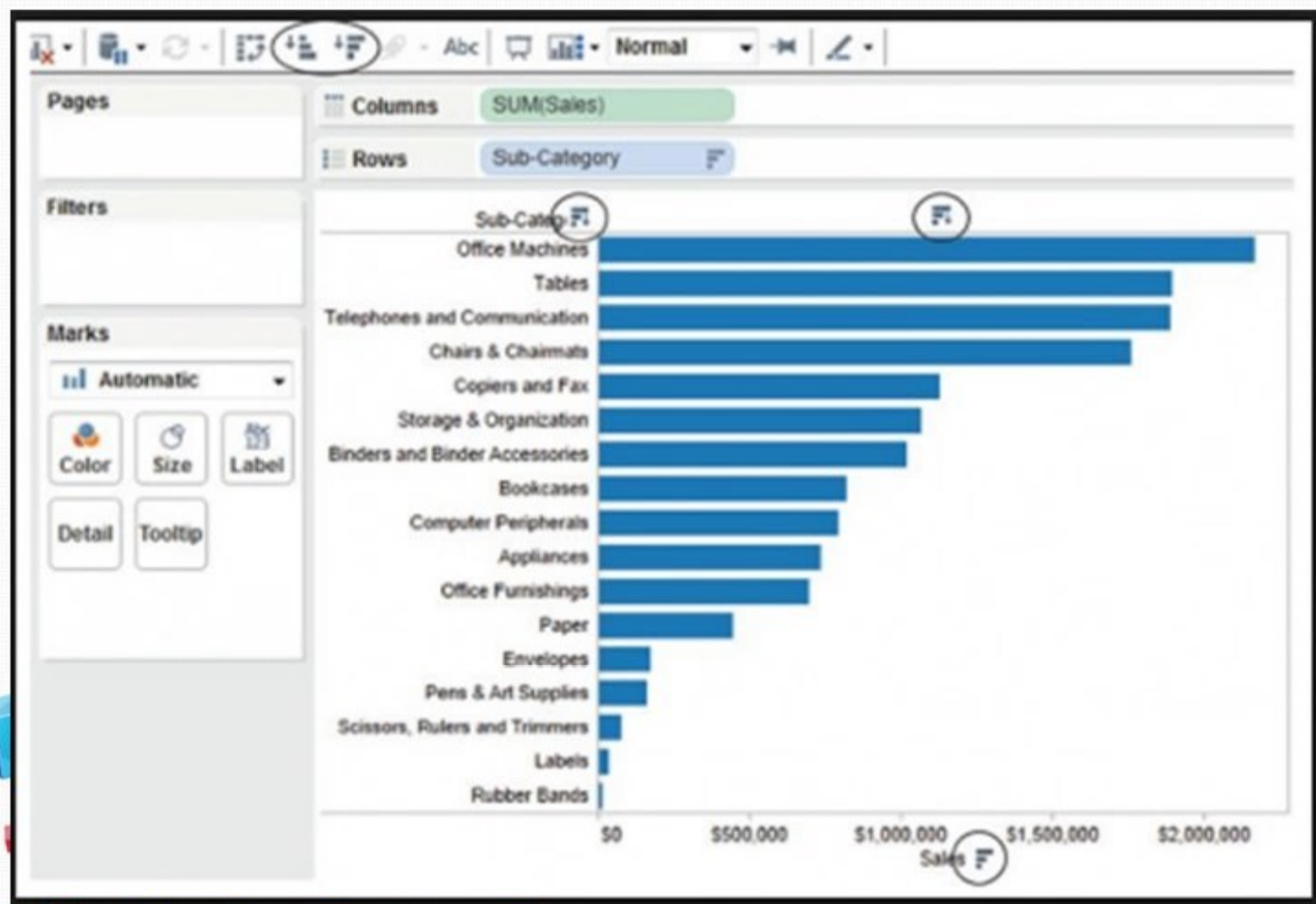


## Sorting By Specific Fields

Columns	Region	SUM(Sales)
Rows	Customer Name	
Customer Na..	Filter...	Show Filter
Aaron Davies..	Sort...	Format...
Aaron Day	Show Header	
Aaron Dillon	Include in Tooltip	
Aaron Fuller ..	Edit Aliases...	
Aaron Riggs		
Aaron Shaffer		



# Computed Sorting (Axis Sorting)





# Computed Sorting (Dimension Dropdown)

Sort [Region] X

**Sort order**

☐ Ascending  
☒ Descending

**Sort by**

☐ Data source order  
☐ Alphabetic  
☒ Field

Aggregation:

Sales Sum

☐ Manual

West  
East  
Central  
South

Up  
Down

Clear OK Cancel Apply

# Computed Sorting- Hands On

- Exercise 1\*- Which Product is having the maximum sales?
- Exercise 2\*- Sort the rows and columns of a text table to determine which product sub-category and year have highest average discount.





# Manual sorting

Manual sorting allows to rearrange the order of dimension members in the table by dragging them in an ad-hoc fashion, giving precise control over how items appear next to one another in tables and in legends.

It also gives you control over the order in which data is drawn on the screen. This control is useful when comparing specific pieces of data or interpreting overlapping data.

Manual sorts can only be applied to **discrete fields including a discrete measure.**



# Sorting by drag & drop

Select the dimension member you want to move. This can be any dimension member that appears in a row or column header of a table, or in a legend like the color legend.

Drag the member to the desired location within that row, column or legend.





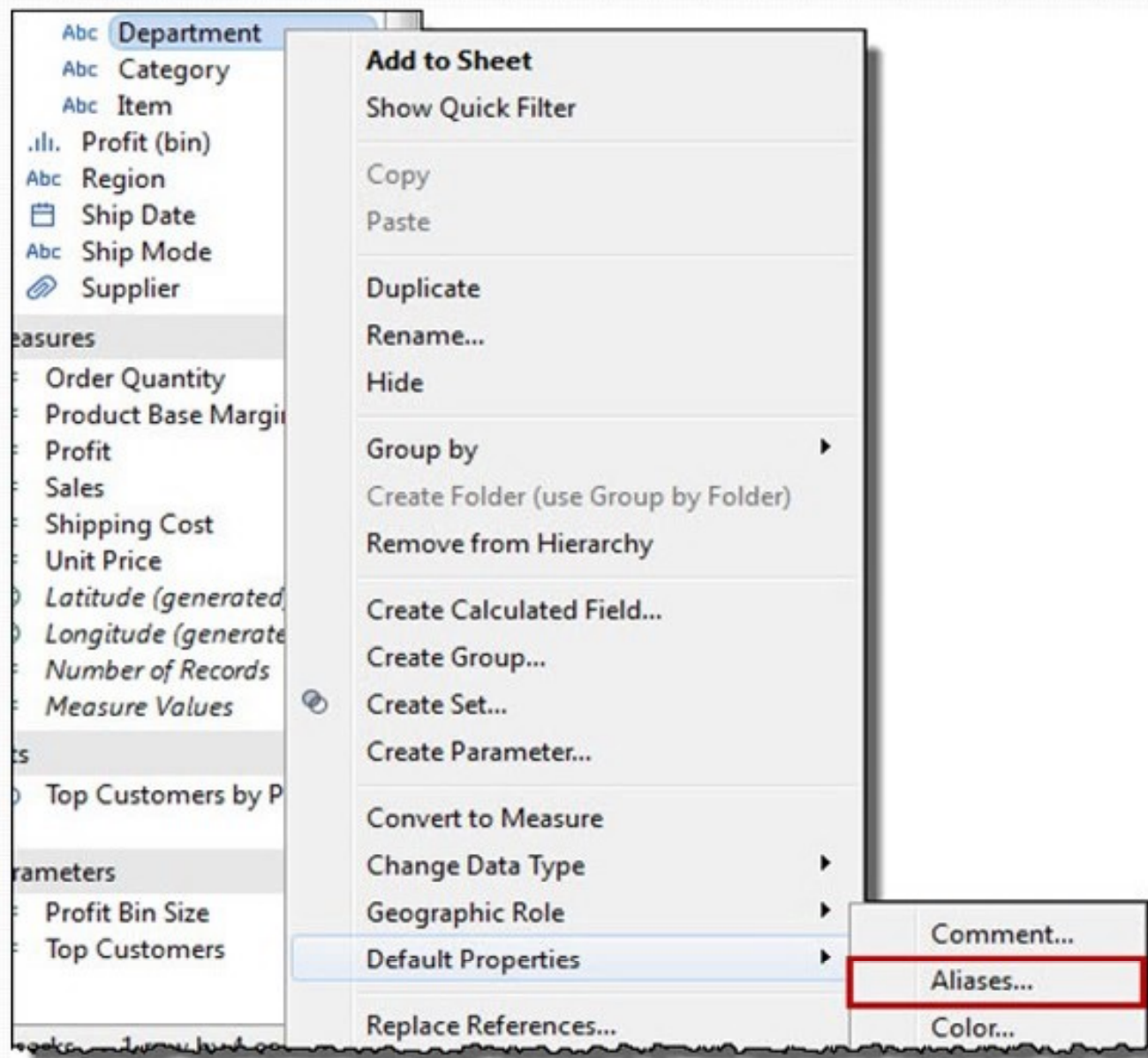
# ALAISES

Aliases are alternate names for specific values within a dimension.

You cannot define aliases for continuous dimensions and dates, and they do not apply to measures.

The method for creating aliases depends on the type of data source you are using.



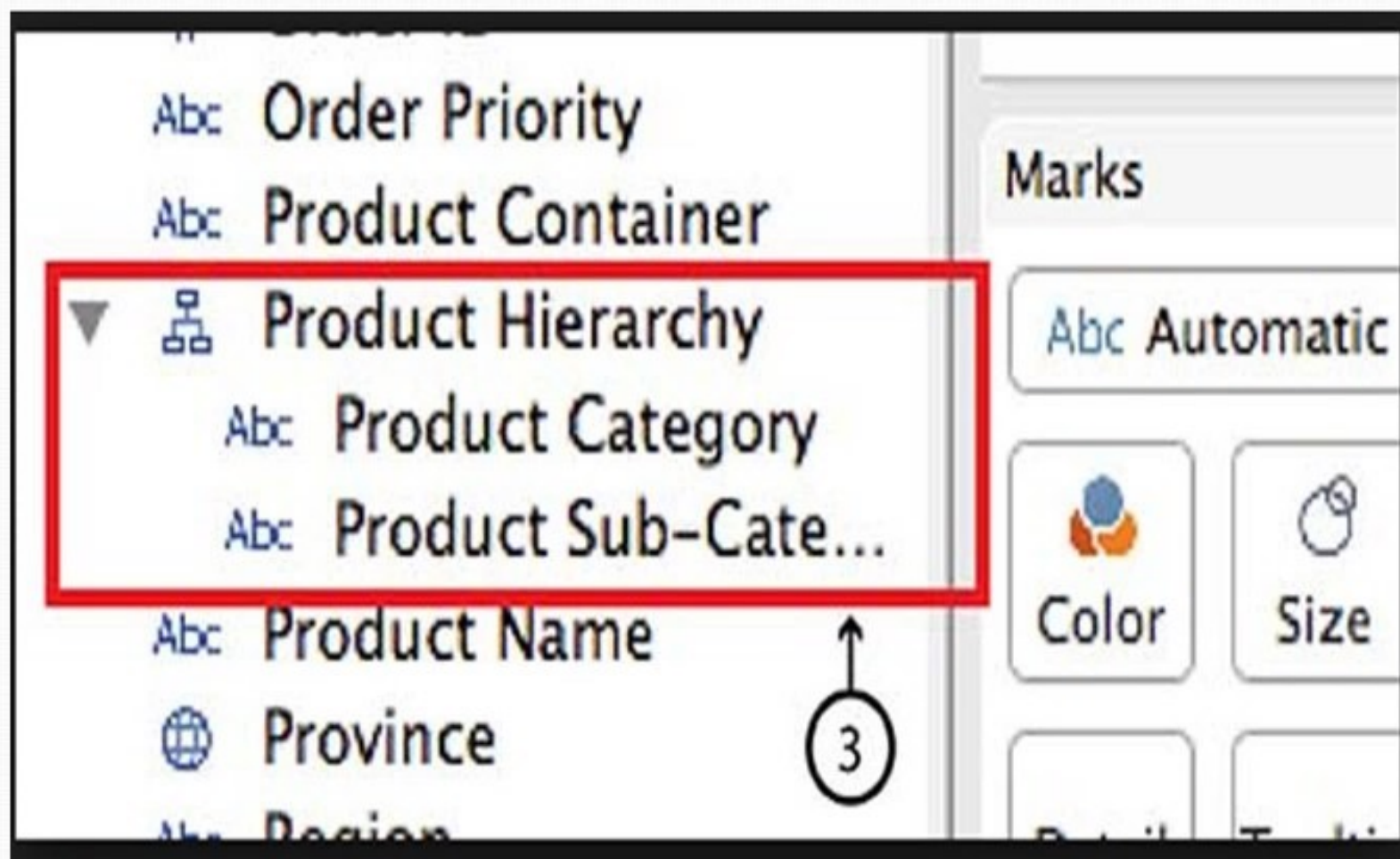




# HIERARCHIES

- Hierarchies provide a way to start with high-level overview of data and then drill to lower levels.
- For example, your database might contain a Product dimension that includes members such as product family, product department, and so on organized into a hierarchy.
- Creating a tableau hierarchy is really simple. Using the ctrl key select the dimensions you want to be in your hierarchy, right click and 'Create Hierarchy'. Once the hierarchy is created it's simple to put into the correct order, just drag and drop the dimensions in the hierarchy into the correct position.







# DRILL

Drilling helps you to navigate through the hierarchies.

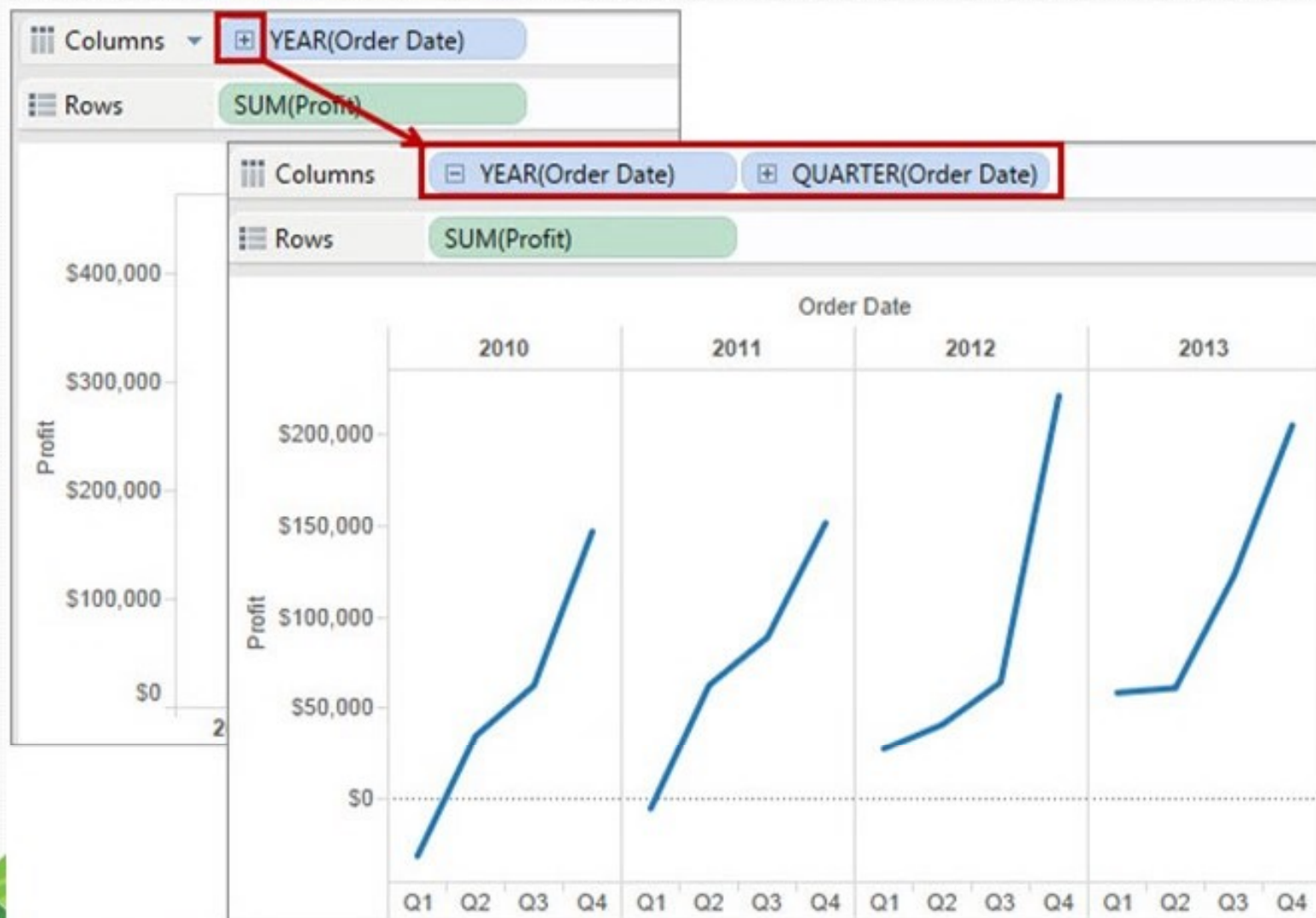
## METHODS OF DRILL

Drill using Fields on Shelf

Drill using Headers



# Drill using fields on shelf





# Drill using header

Columns: YEAR(Date)  
Rows: Product

Product	Date
	2012 2013
Amaretto	\$12,841
Caffe Latte	\$17,558
Caffe Mocha	\$41,537
Chamomile	\$36,989
Colombian	\$62,824
Darjeeling	\$35,799
Decaf Espresso	\$38,240
Decaf Irish Cream	\$30,469
Earl Grey	\$32,670
Green Tea	\$16,080
Lemon	\$46,956
Mint	\$17,480

Keep Only  
Exclude  
Hide  
+ Drill Down

Columns: YEAR(Date) QUARTER(Date)  
Rows: Product

Product	2012				2013			
	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Amaretto	\$3,187	\$3,182	\$3,189	\$3,283	\$3,454	\$3,233	\$3,243	\$3,498
Caffe Latte	\$4,440	\$4,562	\$4,362	\$4,195	\$4,809	\$4,634	\$4,427	\$4,470
Caffe Mocha	\$9,894	\$10,192	\$10,939	\$10,512	\$10,714	\$10,351	\$11,098	\$11,204
Chamomile	\$8,969	\$9,105	\$9,553	\$9,342	\$9,714	\$9,249	\$9,693	\$9,953
Colombian	\$14,585	\$16,048	\$17,298	\$14,893	\$15,799	\$16,280	\$17,540	\$15,868
Darjeeling	\$8,614	\$9,061	\$9,527	\$8,597	\$9,329	\$9,197	\$9,665	\$9,161
Decaf Espresso	\$9,486	\$9,725	\$9,885	\$9,144	\$10,273	\$9,876	\$10,029	\$9,744
Decaf Irish Cream	\$7,276	\$7,957	\$8,057	\$7,179	\$7,882	\$8,079	\$8,166	\$7,652
Earl Grey	\$7,771	\$8,332	\$8,557	\$8,010	\$8,417	\$8,460	\$8,689	\$8,536
Green Tea	\$3,835	\$4,043	\$4,062	\$4,125	\$4,154	\$4,109	\$4,127	\$4,395
Lemon	\$10,780	\$11,993	\$12,541	\$11,642	\$11,677	\$12,173	\$12,714	\$12,406
Mint	\$4,248	\$4,638	\$4,556	\$4,038	\$4,603	\$4,707	\$4,616	\$4,304
Regular Espresso	\$2,807	\$2,922	\$2,756	\$3,265	\$3,038	\$2,965	\$2,799	\$3,479