

Manage Data Properties Step by Step Guide

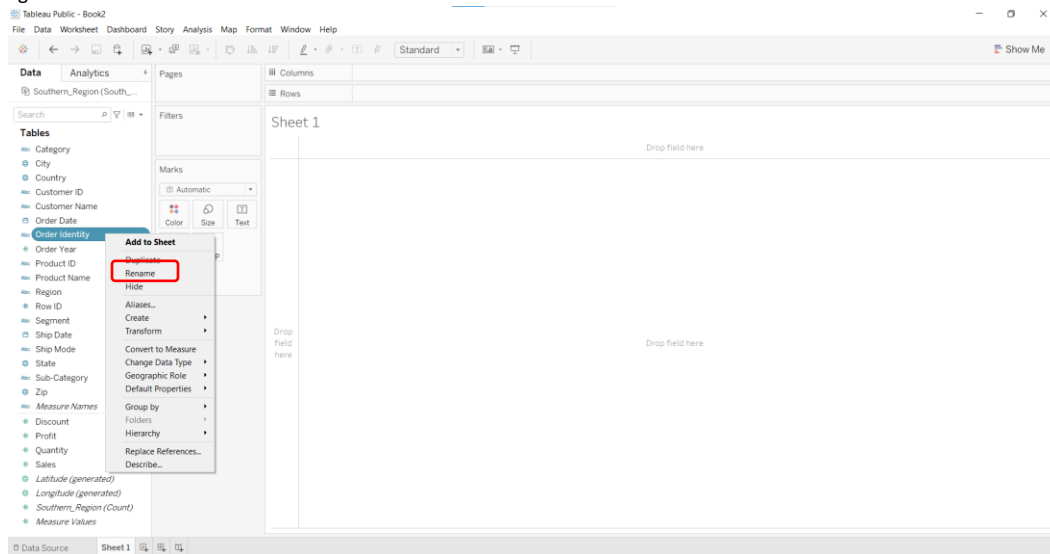
1. Import South_Superstore file into Tableau and add Southern_Region table

Tableau Desktop interface showing the 'Southern_Region (South_Superstore)' worksheet. The 'Connections' pane on the left shows 'South_Superstore' as the data source. The 'Sheets' pane shows 'Southern_Region' as the selected sheet. The main view displays a table with columns: Row ID, Order ID, Order Date, Ship Date, Ship Mode, Customer ID, Customer Name, Segment, Country, City, State, Zip, and Region. The 'Region' column is highlighted in blue.

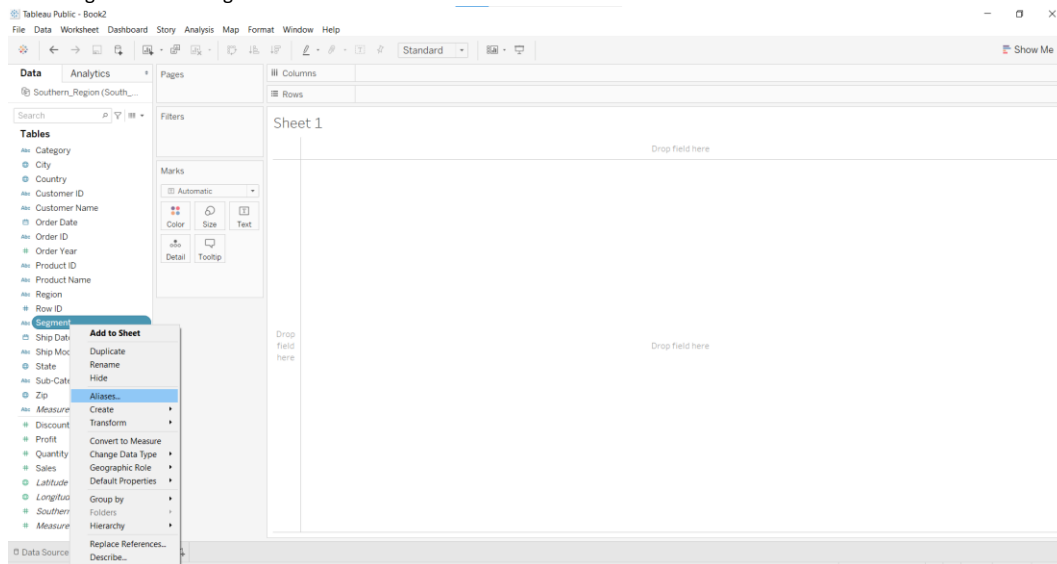
2. Rename column "Order ID" to "Order Identity" – There are multiple ways you can do this : double-clicking the column title; right-click on the column and select Rename; click the down arrow above the column title and select Rename

Tableau Desktop interface showing the 'Southern_Region (South_Superstore)' worksheet. The 'Order ID' column title is right-clicked, and a context menu is open with the 'Rename' option selected. The 'Region' column is highlighted in blue.

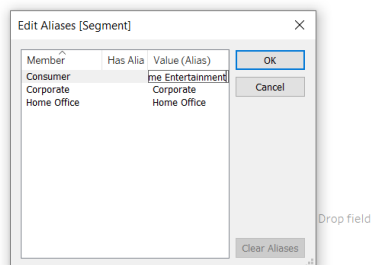
3. Go to Sheet1 and from the field list -> select the Order Identity column -> right click -> select Rename and rename the column back again to "Order ID"



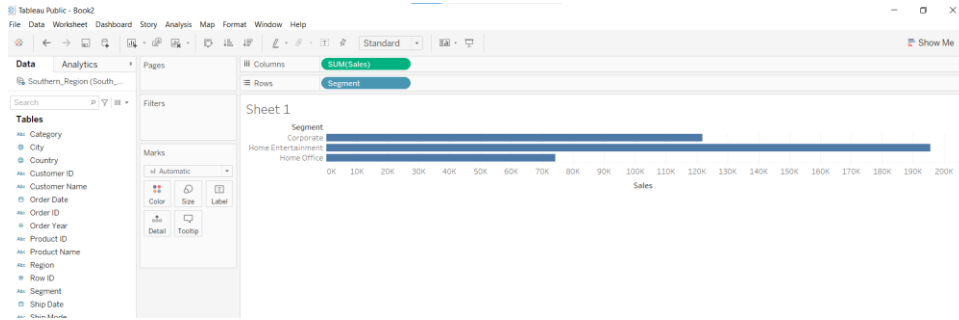
4. Select Segment field -> right click and select Aliases...



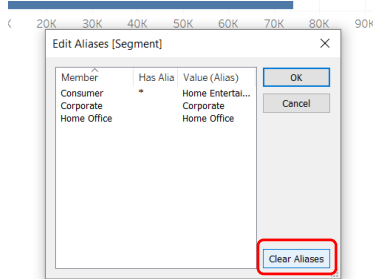
5. In the Edit Aliases dialog, change the alias for Consumer to Home Entertainment



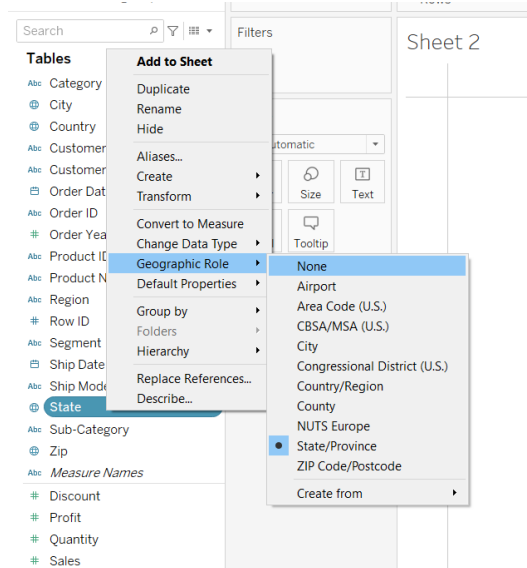
6. Drag Segment to the Rows shelf and Sales to the Columns shelf



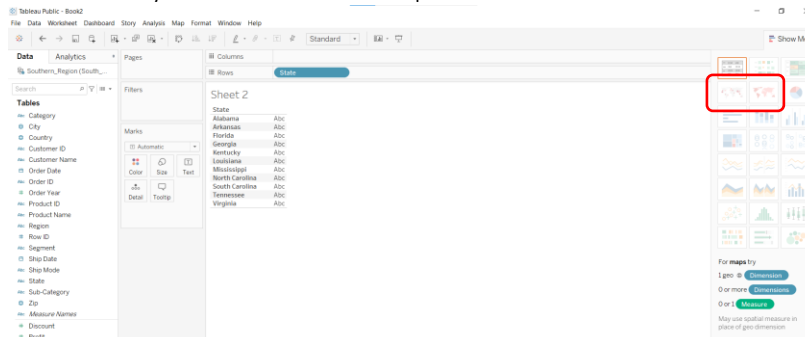
7. Right click the Segment column -> Aliases -> Clear Aliases to remove the custom alias we recently added



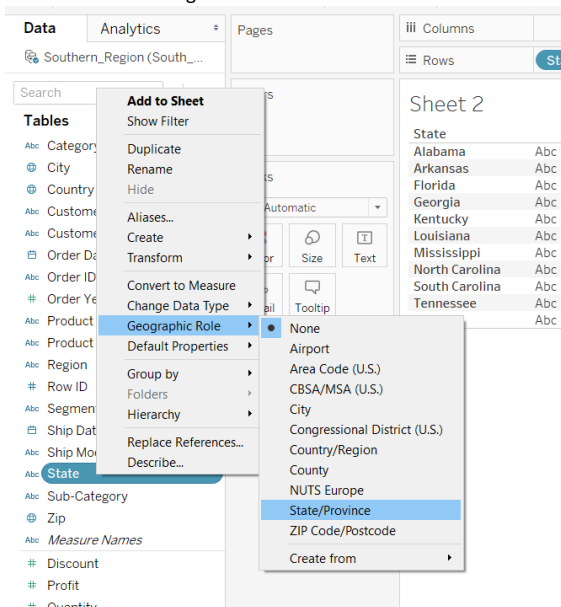
8. Right click on State field -> Geographic Role -> None to remove the geographic role of that field



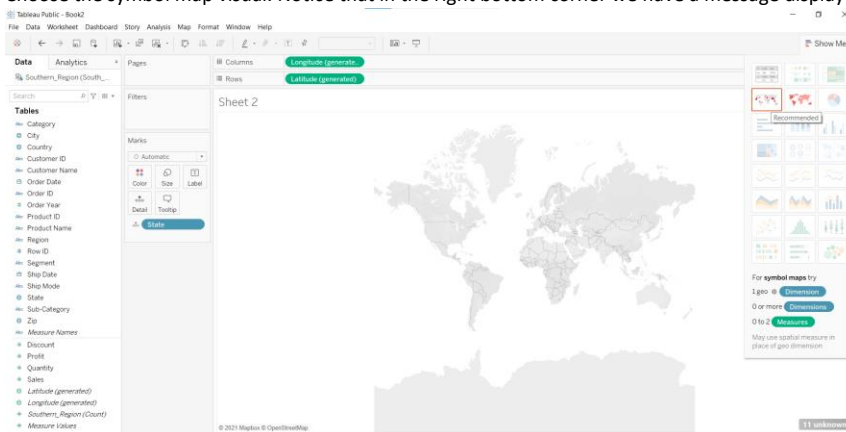
9. Notice that now you can't use this field in a map visual



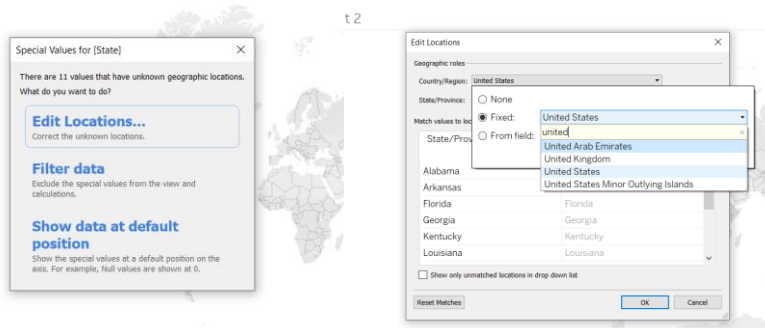
10. Reassigning a geographic role to the State field by right-clicking the field -> Geographic Role -> State/Province. After this the map visual should be available again.



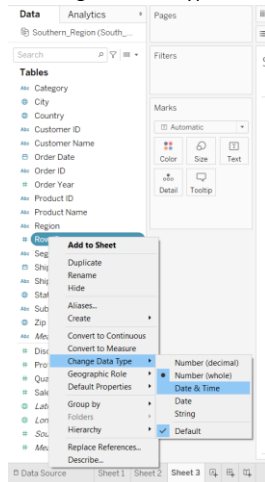
11. Choose the symbol map visual. Notice that in the right bottom corner we have a message displayed – “11 unknown”



12. Click the message and on the dialog that appears -> Edit Locations -> in the Country dropdown list choose United States. The map should display now correctly.



13. To change the data type of a field you have to right click the field -> Change Data Type -> Choose the appropriate type.



14. To change the default properties of a field you right click the field -> Default Properties -> Choose the different property you want to set. You can set the default aggregation as Average, Median etc, change the number format, color etc.

