



Session 1: Visualizing Data Using Tableau

Duration: 3 Hours



Session Outcomes

Understand its interface and concept of dimension and measure.

Understand Tableau and its importance.

01

Create different types of charts like Column Chart, Pie Plot, Bubble charts, Dual chart, Map chart, etc.

02

Format visuals based on font, line, border, etc.

03

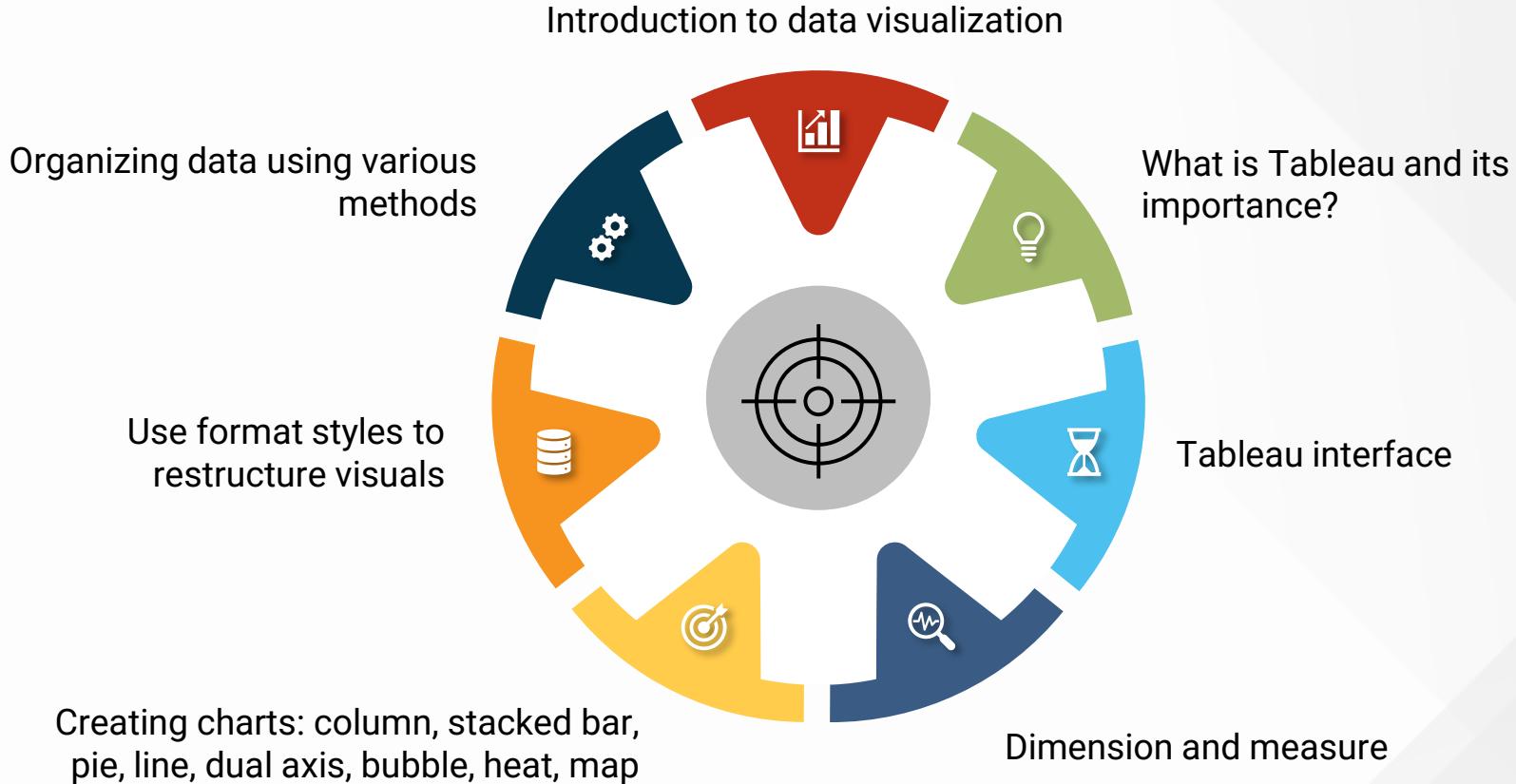
Organizing data using different concepts like set, group, parameter, etc.

04

05



Agenda





What Is Data Visualization?

Data visualization is the process of converting raw data into easily understood pictures of information that enable fast and effective decisions.

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27362,2006.11.27 15:8,2006.11.27 15:8,en,Djibouti,Manufacturing,6+ years,101-250,0,4,0,"another random text",5,5,5,5,Opinio,1,
27363,2006.11.27 15:8,2006.11.27 15:8,en,Tanzania,Retail,1 - 2 years,1001-5000,1,1,1,"123456",2,2,2,2,Opinio,0,1,1,1,1,1,1,1
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27369,2006.11.27 15:8,2006.11.27 15:8,en,Panama,Transportation,1 - 2 years,11-25,5,4,5,"123456",5,5,5,5,Opinio,0,1,0,0,1,0,0
27370,2006.11.27 15:8,2006.11.27 15:8,en,Maldives,Other,6+ years,10001 or more,2,5,2,"another random text",6,6,6,6,Network_Pro
27371,2006.11.27 15:8,2006.11.27 15:8,en,Kyrgyzstan,Medical,2 - 5 years,26-100,3,5,3,"f6{[]}+âœ'"/"-+/\\",6,6,6,6,Network_Pro
27372,2006.11.27 15:8,2006.11.27 15:8,en,Antigua and Barbuda,Government,6 - 12 months,501-1000,6,2,6,"this is a random other t
27373,2006.11.27 15:8,2006.11.27 15:8,en,Belarus,Financial Services,6+ years,10001 or more,2,1,2,"another random text",2,2,2,2
27374,2006.11.27 15:8,2006.11.27 15:8,en,Vatican City,Non-profit,1 - 2 years,11-25,0,0,0,"123456",1,1,1,1,Network_Probe,1,0,0,
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27377,2006.11.27 15:8,2006.11.27 15:8,en,Chad,Software Vendor,<6 months,1-5,6,2,6,"hey",3,3,3,3,Network_Probe,1,1,1,1,1,1,1,1
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27387,2006.11.27 15:8,2006.11.27 15:8,en,Puerto Rico,Non-profit,<6 months,1-5,0,0,0,"hey",1,1,1,1,Opinio,1,1,1,1,0,1,1,1,0,,
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27389,2006.11.27 15:8,2006.11.27 15:8,en,Northern Mariana Islands,Software Vendor,<6 months,1-5,2,2,2,"hey",3,3,3,3,Opinio,1,0





What Is Tableau?

- Data visualization and business intelligence tool used for reporting and analyzing vast volumes of data.
- American company that started in 2003—in June 2019, Salesforce acquired Tableau.
- Helps users create different charts, graphs, maps, dashboards, and stories for visualizing and analyzing data, to help in making business decisions.





Importance of Tableau

Create great visuals

Obtain detailed insights

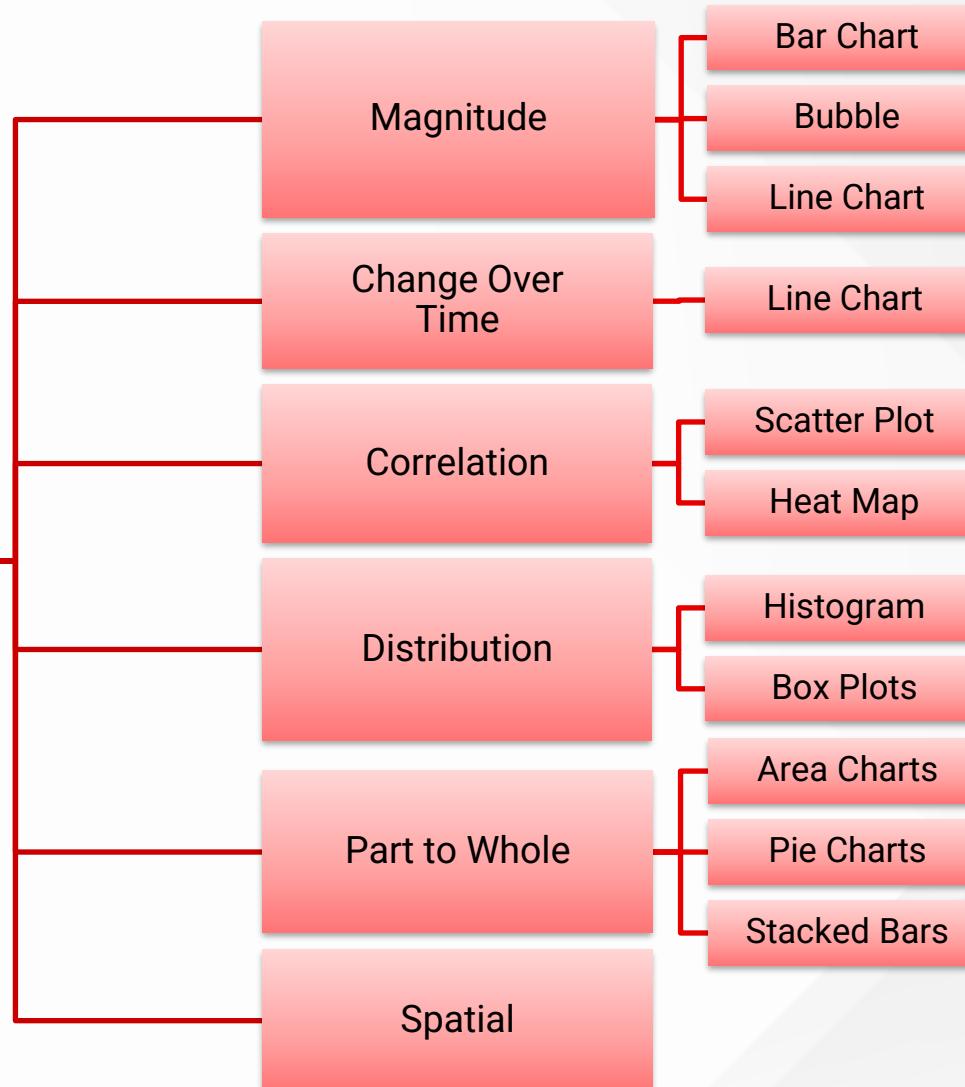
User-friendly approach

Supportive for different
data sources



Categorization of Visuals

How you want to see
your data?

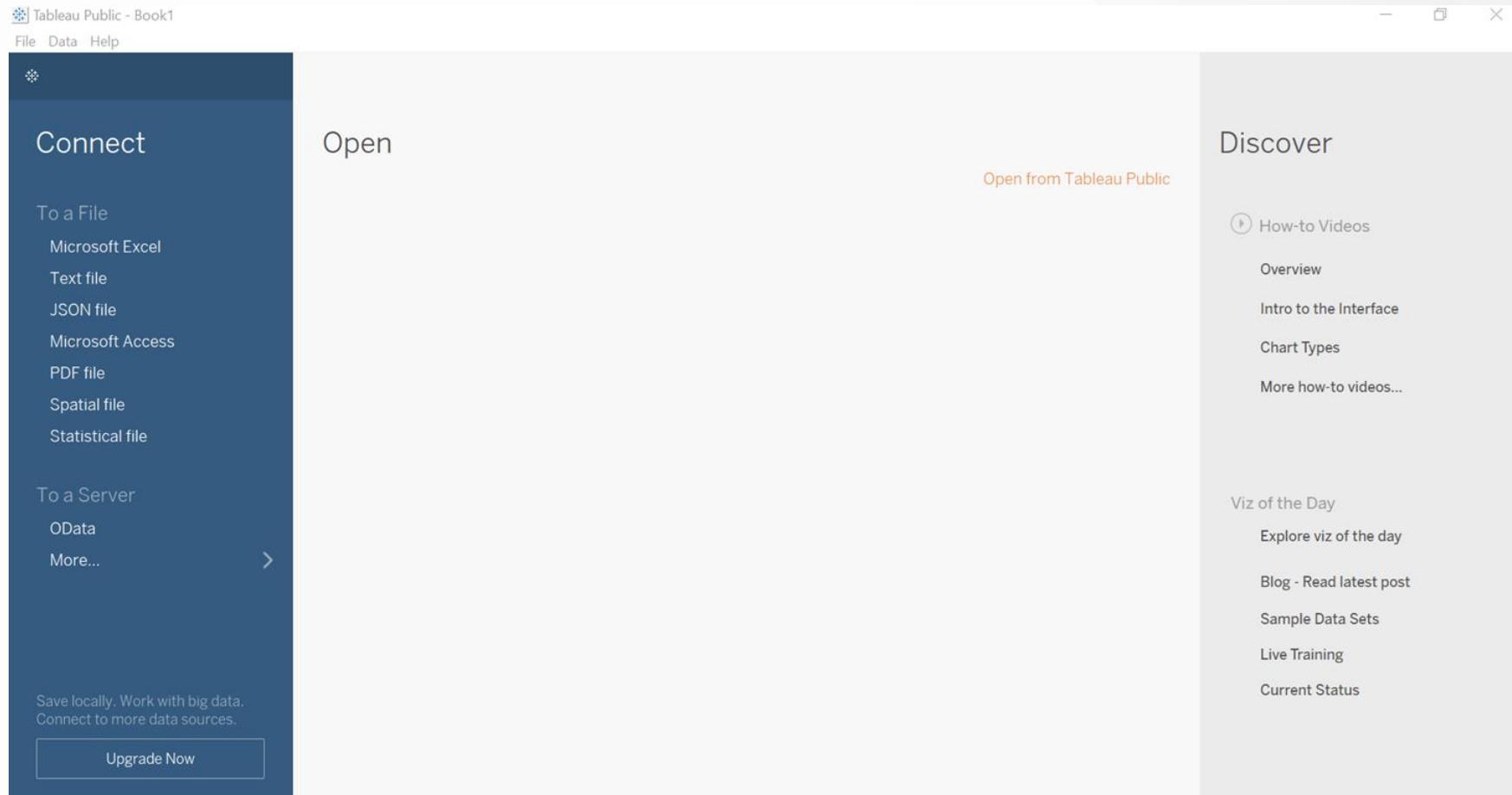


Connecting to the Data





Connecting to the Data



The data sources supported by Tableau appear on the left side of the opening screen. Some commonly used data sources are Excel, text file, relational database or even on a server. One can also connect to a cloud database source such as Google Analytics, Amazon Redshift, etc.



Connecting to the Data

The screenshot shows the Tableau Public interface. The title bar says "Tableau Public - Book1". The menu bar includes File, Data, Window, and Help. The top navigation bar has icons for Home, Back, Forward, Refresh, and Search. On the left, the "Connections" pane shows "Sample - Superstore" (Microsoft Excel) selected. Below it, the "Sheets" pane lists "Orders", "People", "Returns", and "New Union". The main workspace is titled "Sample - Superstore" and contains a grid icon with the text "Drag tables here". At the bottom, there are tabs for "Data Source" and "Sheet1", along with other standard toolbar icons.

Once you import the excel file “Sample-Superstore”, you will see that the different sheets of the excel sheet are reflected on the left-hand pane namely “Orders” , “People” and “Returns”.



Connecting to the Data

Left Pane

Canvas

Data Source

Orders (Sample - Superstore)

Connected to Data!

Workbook
Sample - Superstore.xls

Sheets
Enter sheet name

Orders
People
Returns
New Union

File Data Server Window Help

Orders (Sample - Superstore)

Connection
Live Extract

Filters Add

Orders

Metadata Grid

Sort Data source order Show aliases Show hidden fields Rows 1,000

Field Name	Table	Remote Field Name	At	At	At	At	At
# Row ID	Orders	Row ID	Customer Name	Segment	Country	City	State
Abc Order ID	Orders	Order ID	ire Gute	Consumer	United States	Henderson	Kentucky
Abc Order Date	Orders	Order Date	vin Van Huff	Corporate	United States	Los Angeles	California
Abc Ship Date	Orders	Ship Date	es O'Donnell	Consumer	United States	Fort Lauderdale	Florida
Abc Ship Mode	Orders	Ship Mode	nina Hoffman	Consumer	United States	Los Angeles	California
Abc Customer ID	Orders	Customer ID	nina Hoffman	Consumer	United States	Los Angeles	California
Abc Customer Name	Orders	Customer Name	nina Hoffman	Consumer	United States	Los Angeles	California
Abc Segment	Orders	Segment					
Abc Country	Orders	Country					
Abc City	Orders	City					
Abc State	Orders	State					
Abc Postal Code	Orders	Postal Code					

Grid



Connecting to the Data

Tableau Public - Book1

File Data Window Help

Connections Add

Sample - Superstore Microsoft Excel

Orders (Sample - Superstore)

Filters 0 | Add

Orders

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

Orders 21 fields 9994 rows 100 rows

#	Abc Orders Row ID	Abc Orders Order ID	Abc Orders Order Date	Abc Orders Ship Date	Abc Orders Ship Mode	Abc Orders Customer ID
1	CA-2016-152156	11/8/2016	11/11/2016	Second Class	CG-12520	
2	CA-2016-152156	11/8/2016	11/11/2016	Second Class	CG-12520	
3	CA-2016-138688	6/12/2016	6/16/2016	Second Class	DV-13045	
4	US-2015-108966	10/11/2015	10/18/2015	Standard Class	SO-20335	
5	US-2015-108966	10/11/2015	10/18/2015	Standard Class	SO-20335	
6	CA-2014-115812	6/9/2014	6/14/2014	Standard Class	BH-11710	
7	CA-2014-115812	6/9/2014	6/14/2014	Standard Class	BH-11710	

Name Orders

Fields

Type	Field Name	Phys...	Rem...
#	Row ID	Orders	Row ID
Abc	Order ID	Orders	Order ...
Abc	Order ...	Orders	Order ...

Go to Worksheet

Data Source Sheet 1

Abc
Orders
Customer ID

Hero



Connecting to the Data

Visual Cues	Description
	Text values
	Numeric values
	Only date values
	Both date and time values
	Geographical data
	User-defined set
	Numeric bin
	Group.

Tableau Interface and Types of Fields





Diagram illustrating the layout of a data visualization tool interface:

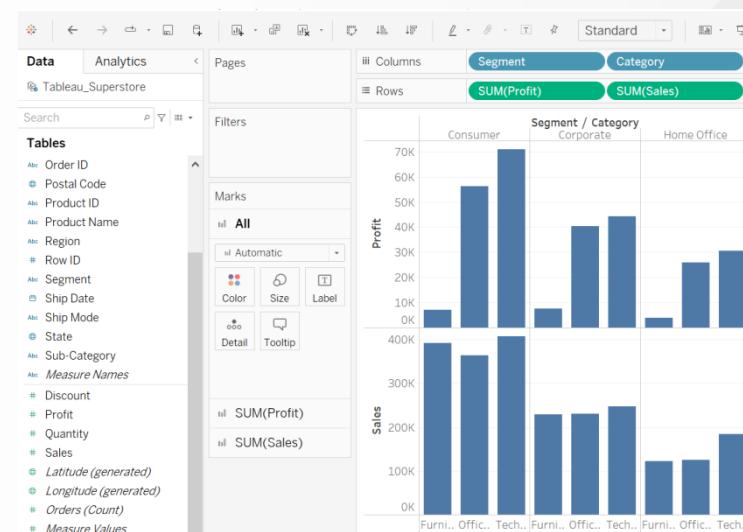
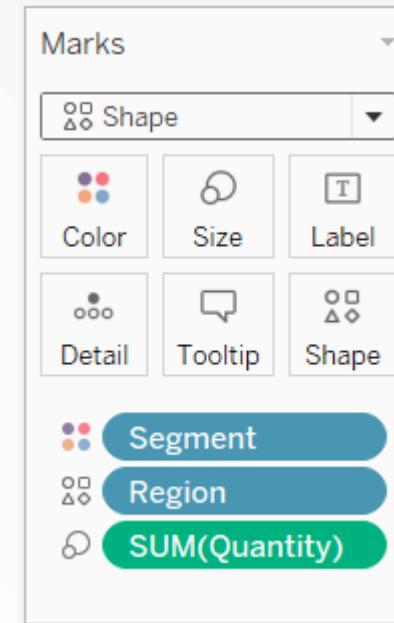
- Menu Bar**: Located at the top, containing options: File, Data, Worksheet, Dashboard, Story, Analysis, Map, Format, Server, Window, Help.
- Tool Bar**: Located above the main workspace, containing various icons for file operations like Open, Save, Print, and zoom.
- Page Shelf**: A panel on the left side labeled "Pages" which lists "Columns" and "Rows".
- Filter Shelf**: A panel on the left side labeled "Filters".
- Marks Card**: A panel on the left side labeled "Marks" which includes settings for "Automatic" and options for "Color", "Size", "Text", "Detail", and "Tooltip".
- Work sheet**: The main workspace area where "Sheet 1" is displayed, with a "Drop field" placeholder.



The Idea of Marks Shelf

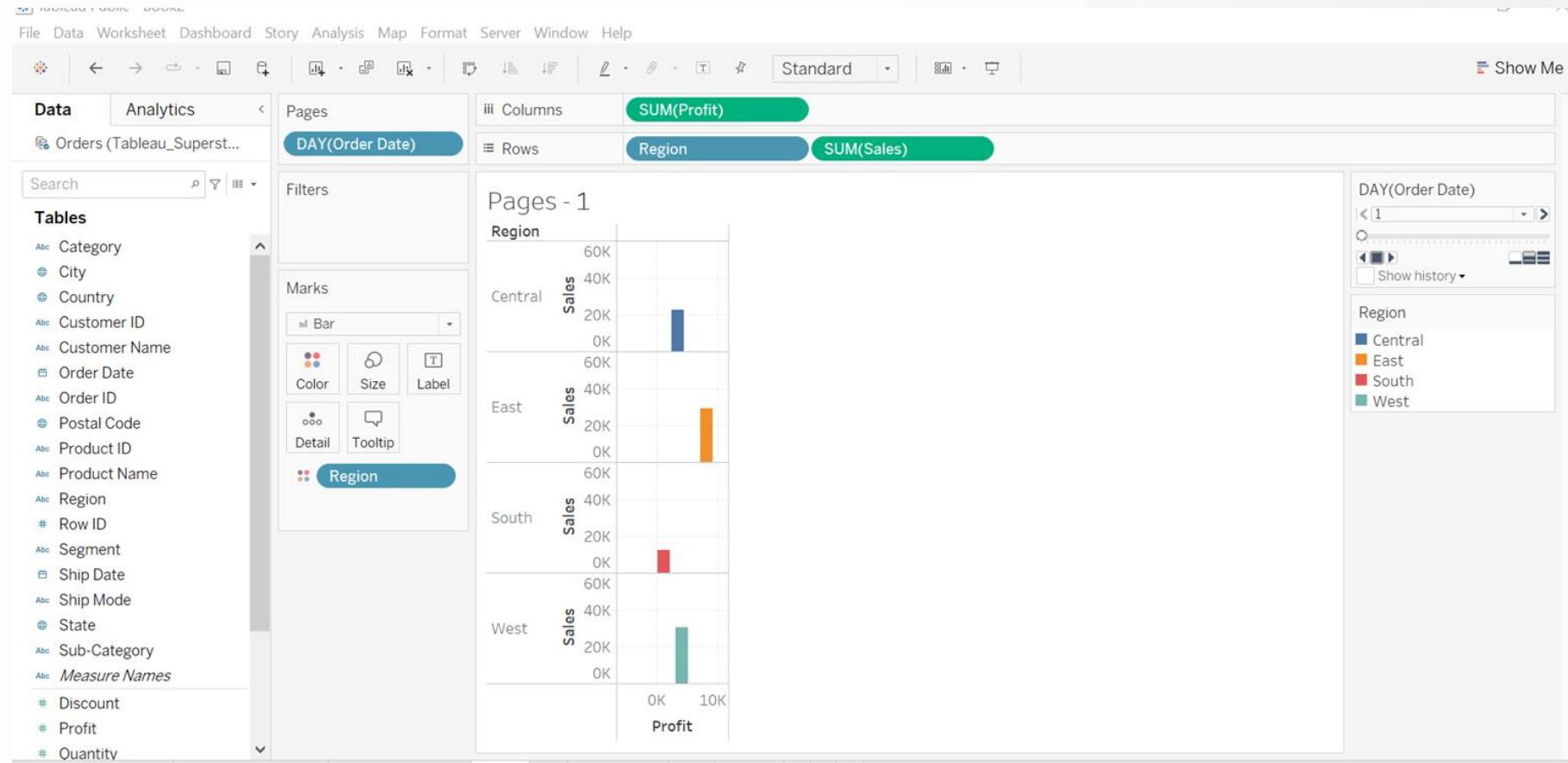
Marks Card

- The Marks card is a key element for visual analysis in Tableau. As you drag fields to different properties in the Marks card, you add context and detail to the marks in the view.
- You use the Marks card to set the mark type and to encode your data with color, size, shape, text, and detail.





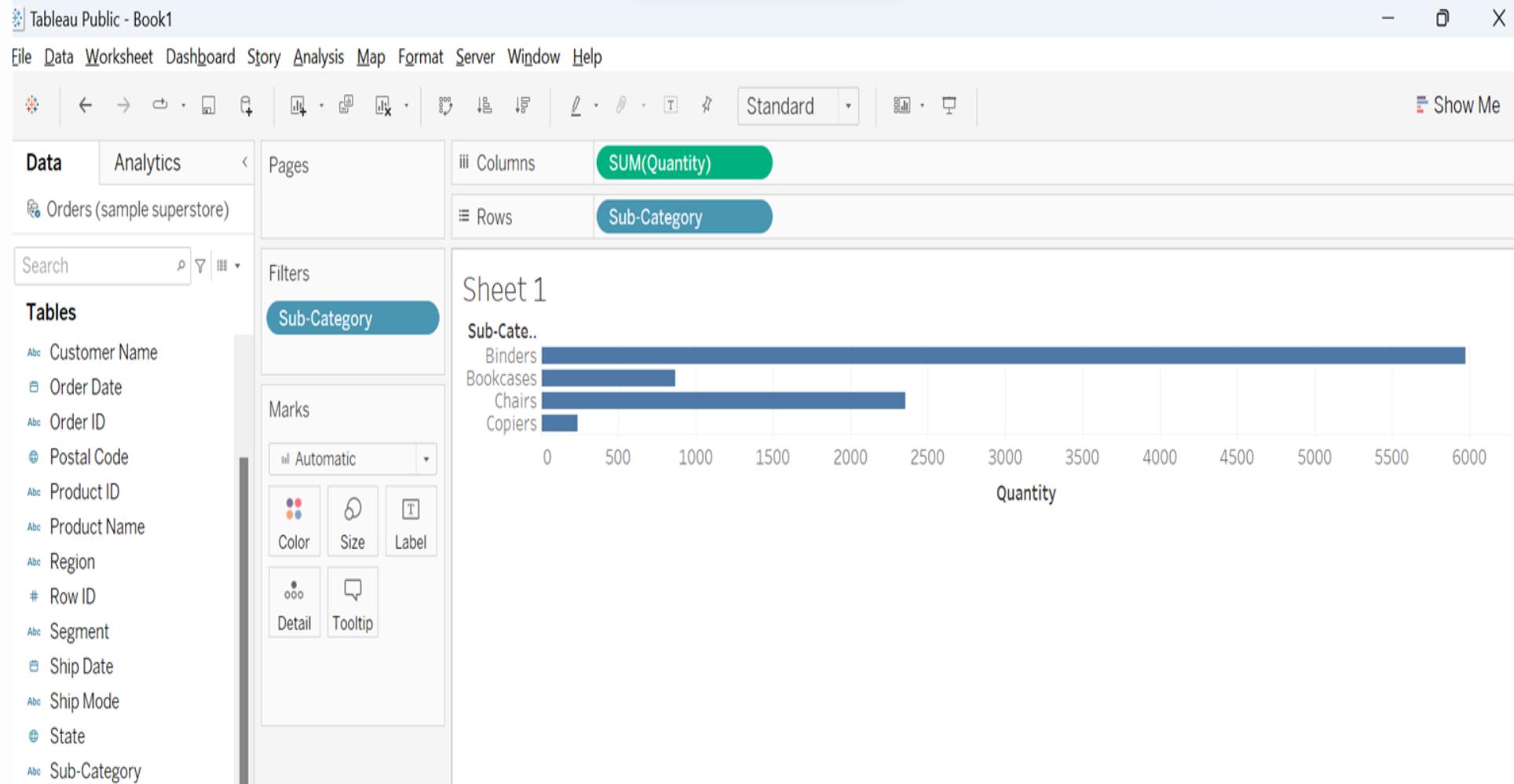
The Idea of Page Shelf



The Pages shelf lets you break a view into a series of pages so you can better analyze how a specific field affects the rest of the data in a view.



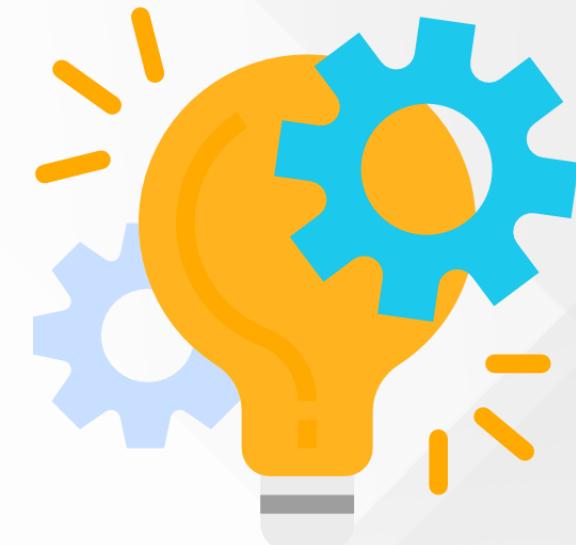
Filter Shelf





Superstore Dataset

- Tableau Superstore Dataset is a sample Dataset provided by Tableau for new users to learn and experiment with different offerings and functionalities available in Tableau.
- It is a vast dataset that provides a base to interact with Dashboard, drill down into the specifics of Data handling, and offer samples for performing Data transformations.





Exploring the Grid

- Row ID
- Order ID
- Order Date
- Ship Date
- Ship Mode
- Customer ID
- Customer Name
- Segment
- Country
- City
- State
- Postal Code
- Region
- Product ID
- Category
- Sub-Category
- Product Name
- Sales
- Quantity
- Discount
- Profit

21 fields (columns) and 9994 data points (rows)



Exploring Dimensions and Measures

Tables

Abc Customer ID
Abc Customer Name
白 Order Date
Abc Order ID
@ Postal Code
Abc Product ID
Abc Product Name
Abc Region
Row ID
Abc Segment
白 Ship Date
Abc Ship Mode
@ State
Abc Sub-Category

Abc Measure Names

Discount
Profit
Quantity
Sales
@ *Latitude (generated)*
@ *Longitude (generated)*
Orders (Count)
Measure Values



Blue vs. Green Fields

- A simple way to summarize the difference between blue and green fields is discrete versus continuous. Blue fields are discrete - they contain a finite number of values and will split your data into categories. Green fields are continuous – they contain an infinite number of values and will draw an axis when you add them to the columns or rows shelves.
- Discrete variables represent counts (e.g., the number of objects in a collection). Continuous variables represent measurable amounts (e.g., water volume or weight).

Note that blue fields are not necessarily always dimensions and the green fields are not always measures. You can turn a dimension into a measure at any time just by dragging the field into the other section, and vice versa



Visualizations for Displaying Data





Types of Plots in Tableau

For **lines (discrete)** try

1 date ☰

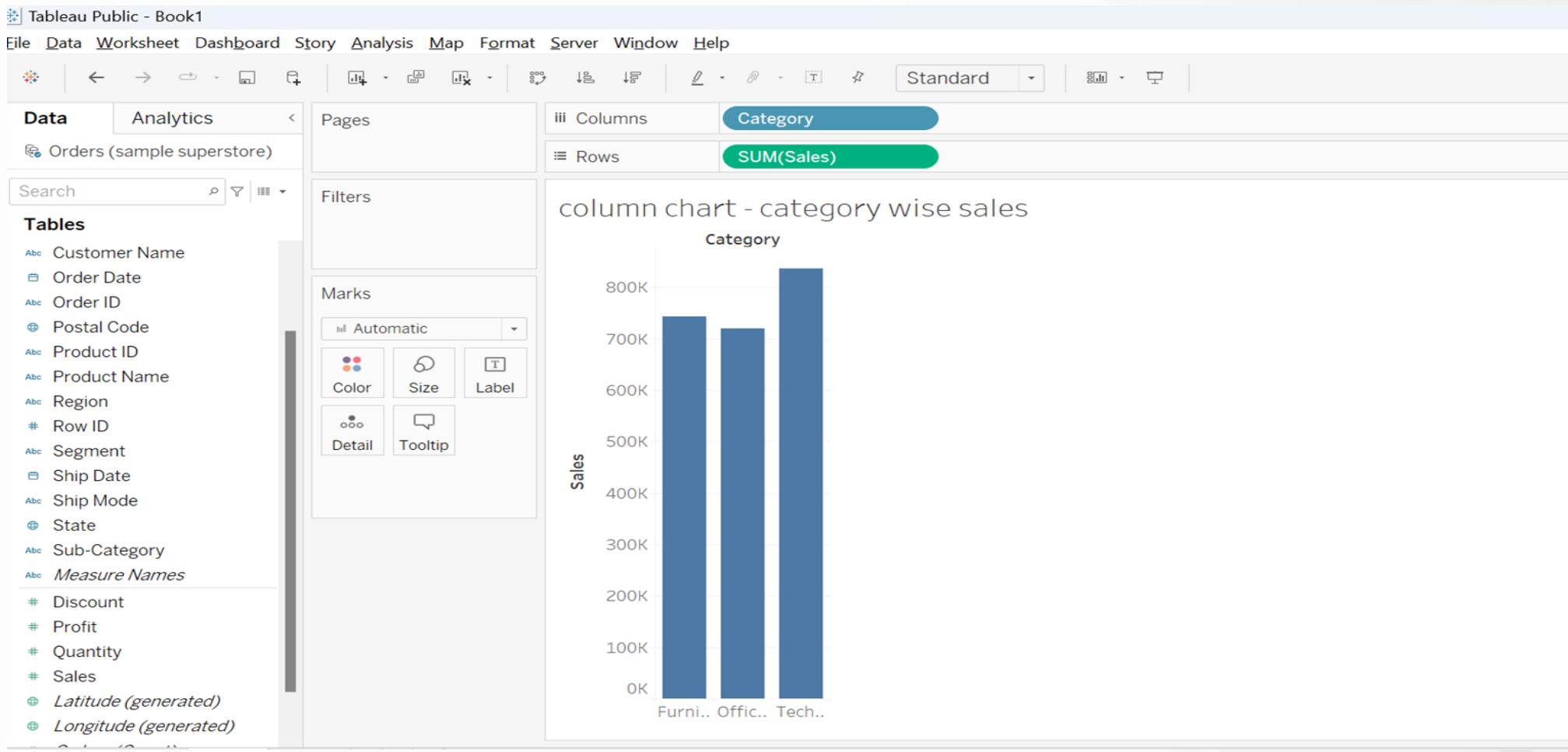
0 or more **Dimensions**

1 or more **Measures**

There are 24 different charts in Tableau for which we can work on presenting different visuals on different data.

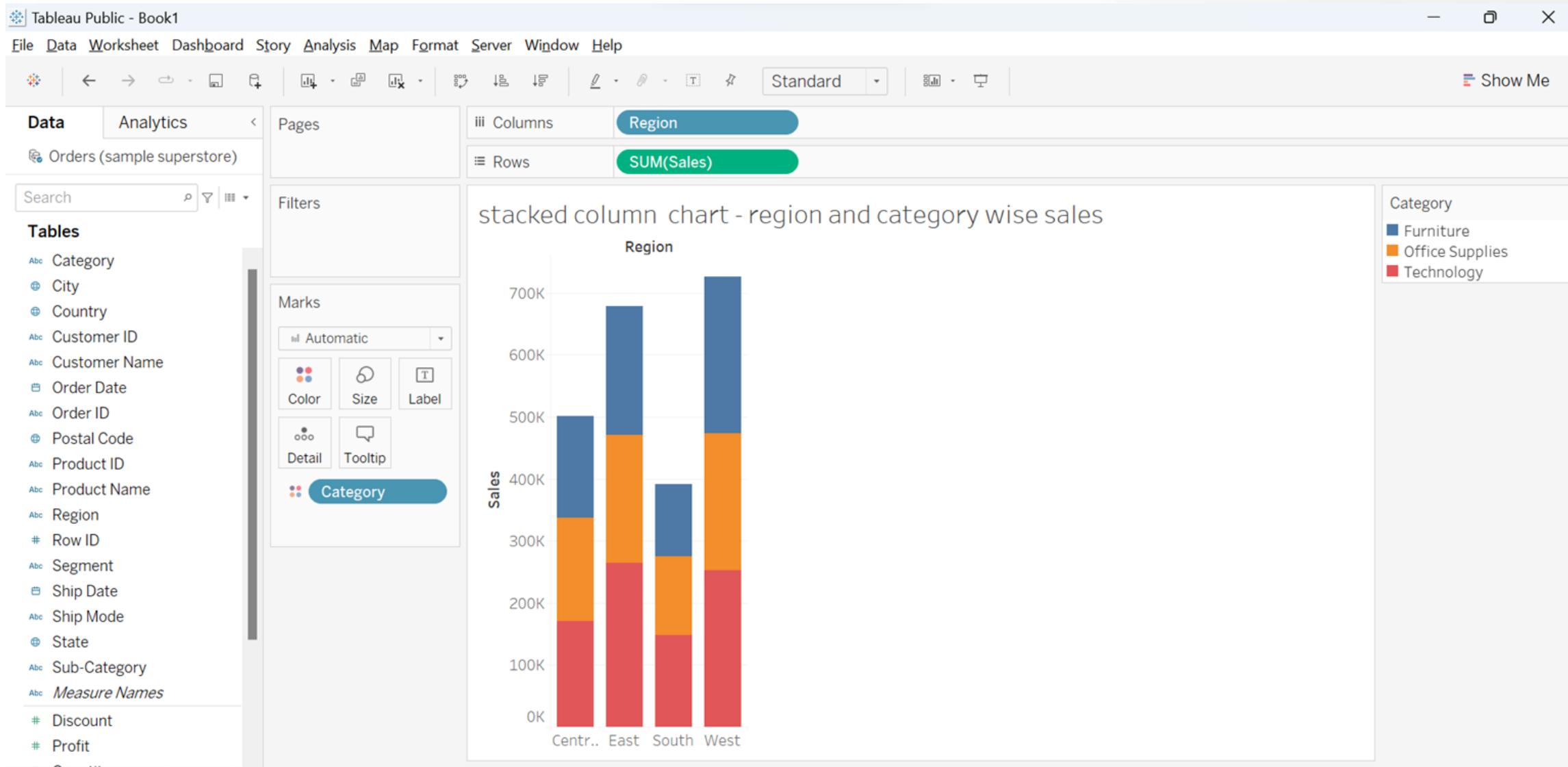


Column Chart - Category-wise Sales



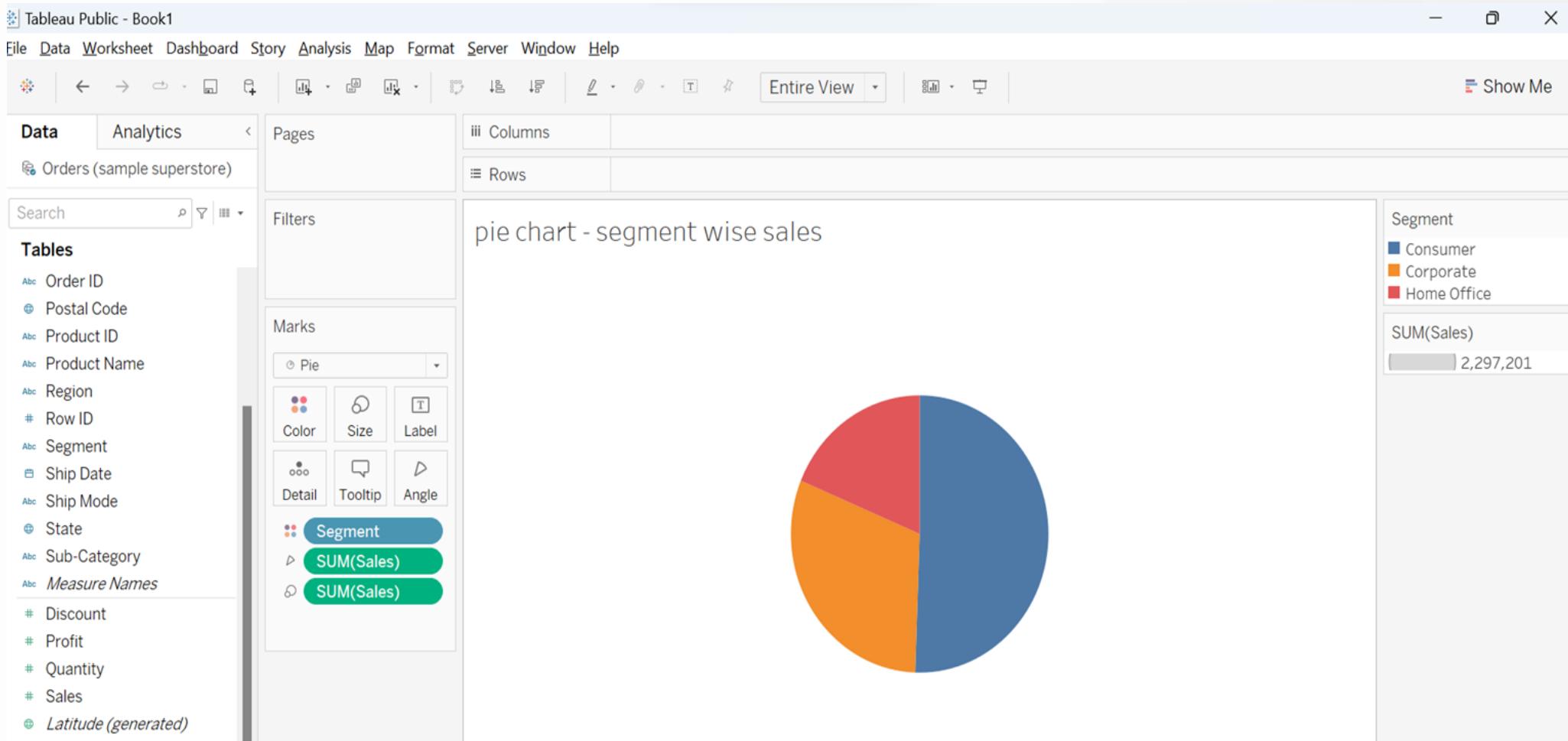


Stacked Bar Chart - Region and Category-wise Sales



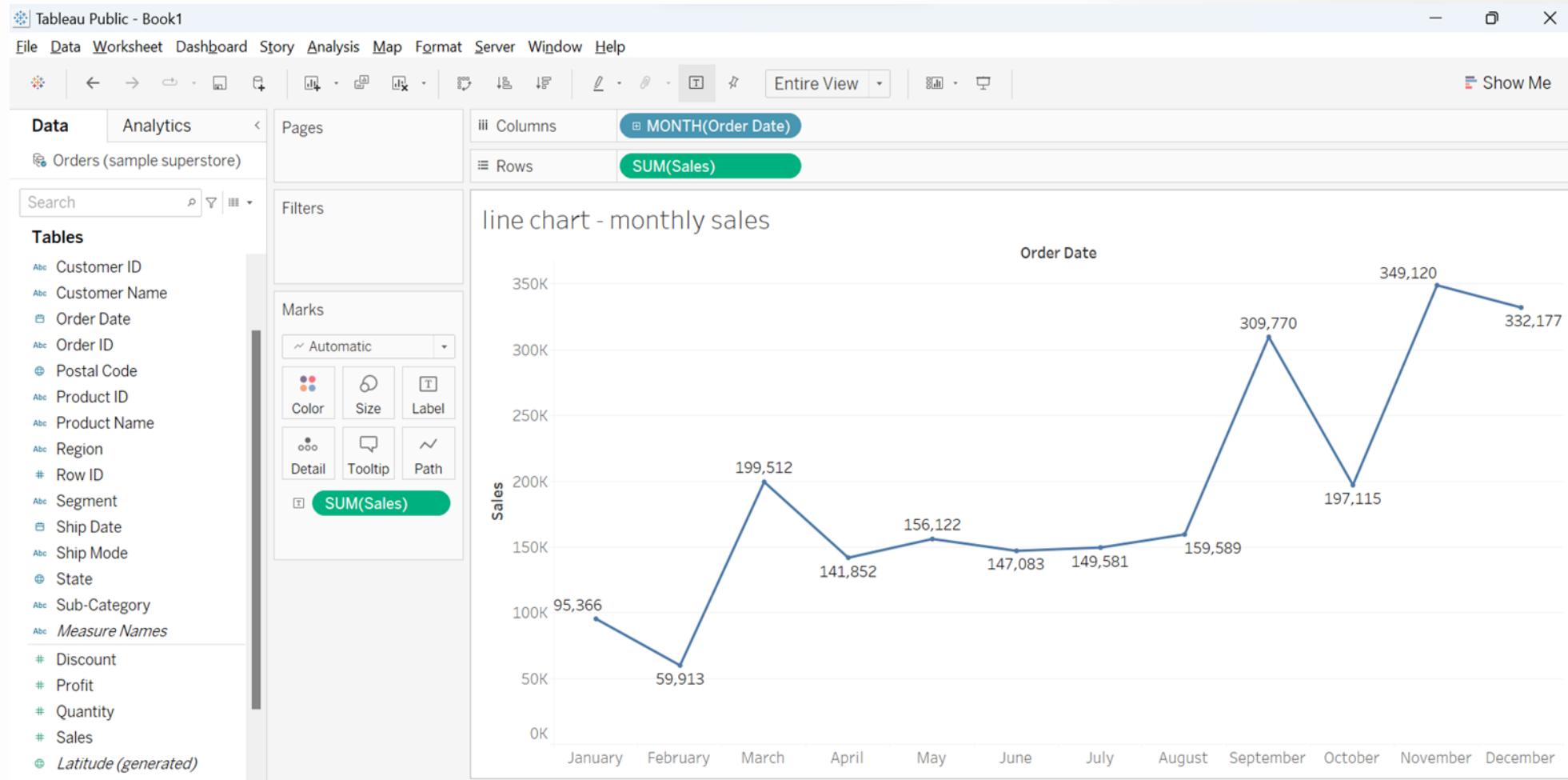


Pie Chart - Segment-wise Sales



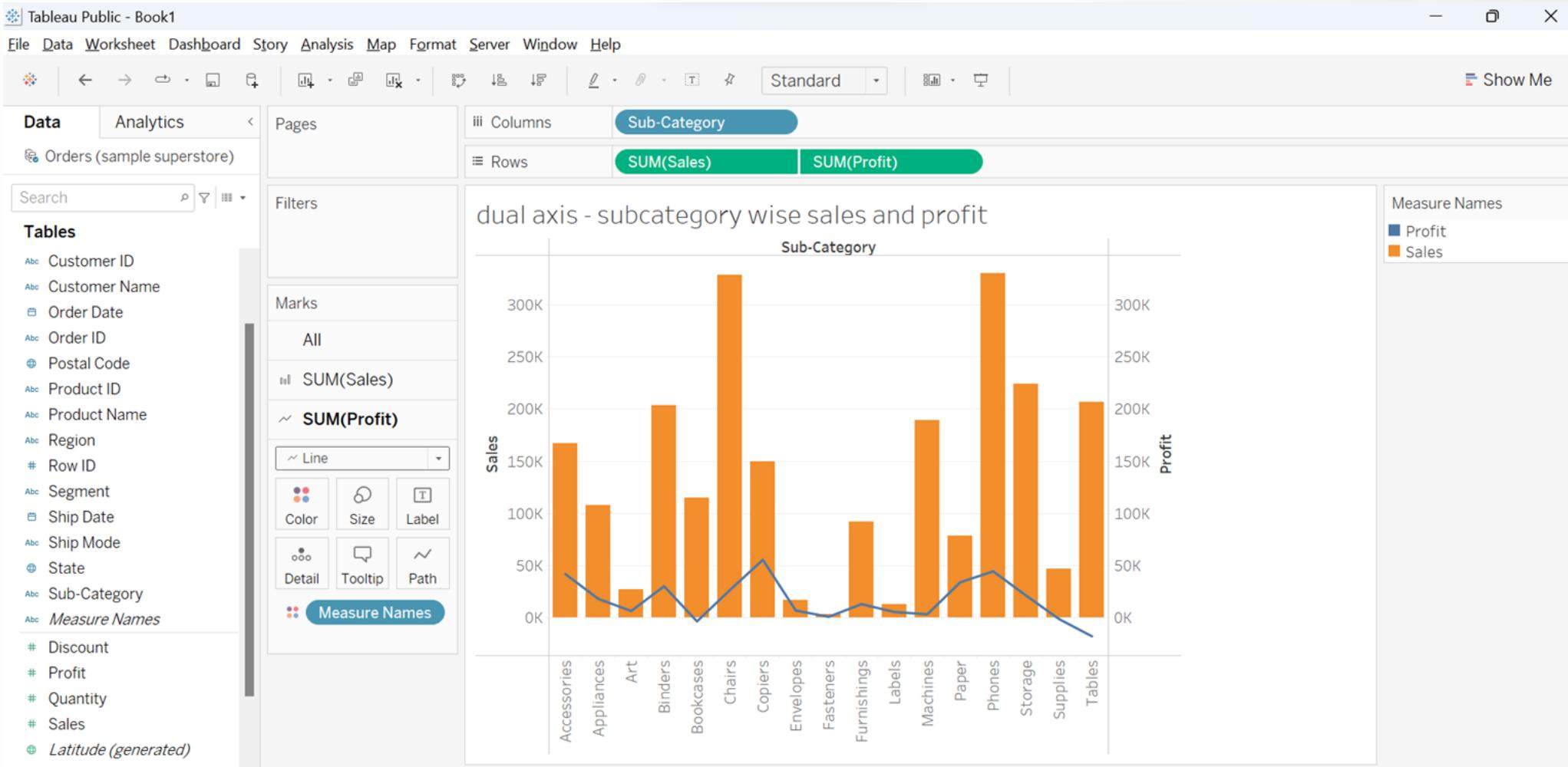


Line Chart - Month-wise Sales



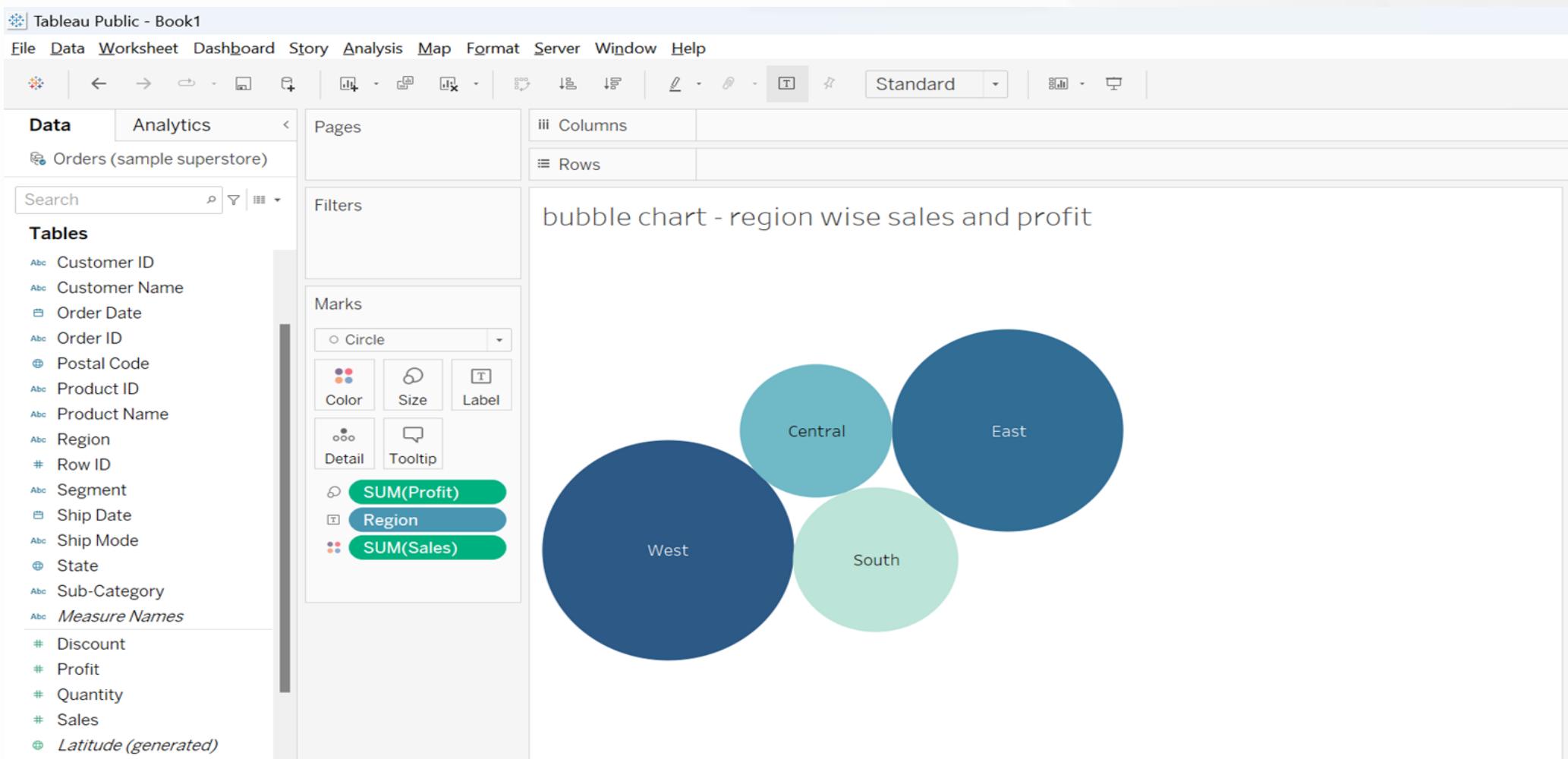


Dual Axis - Subcategory-wise Sales and Profit



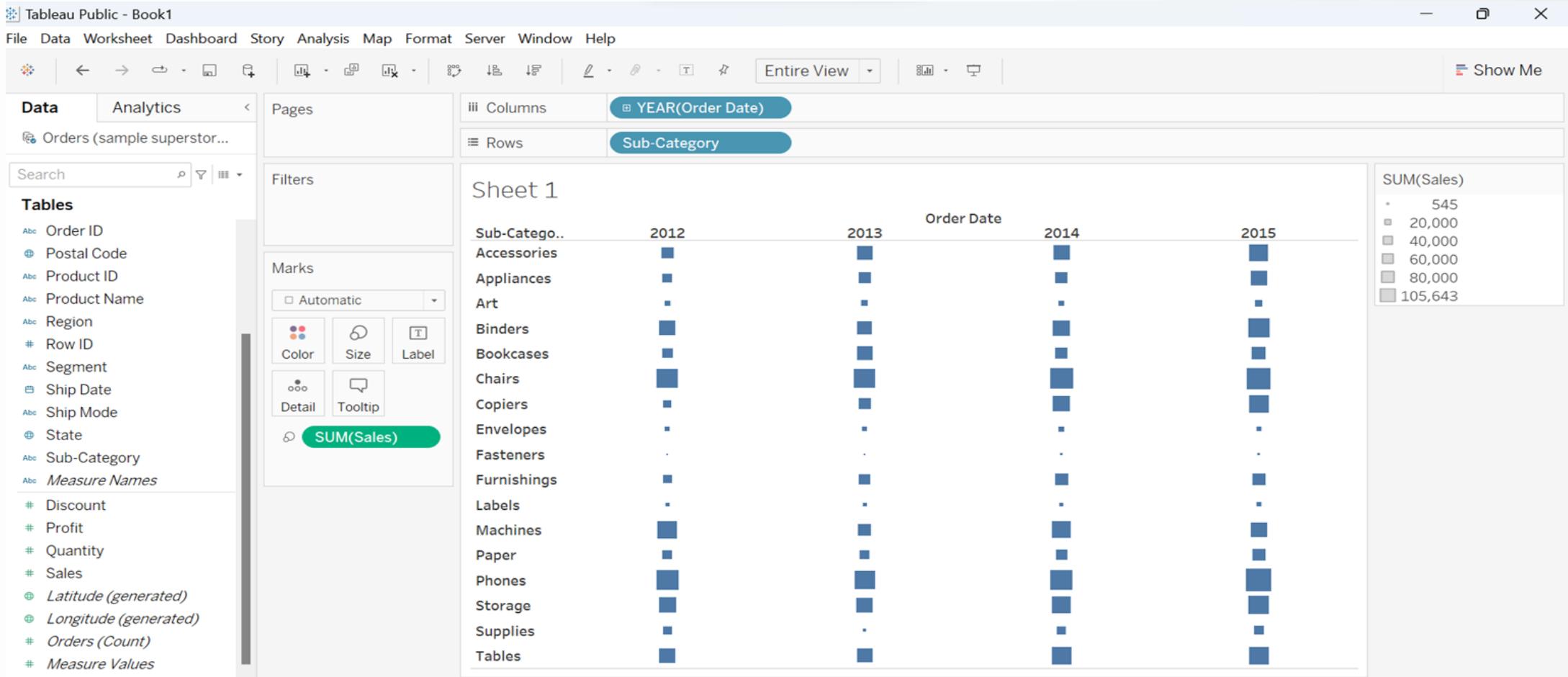


Bubble Chart - To Plot Region-wise Sales and Profit



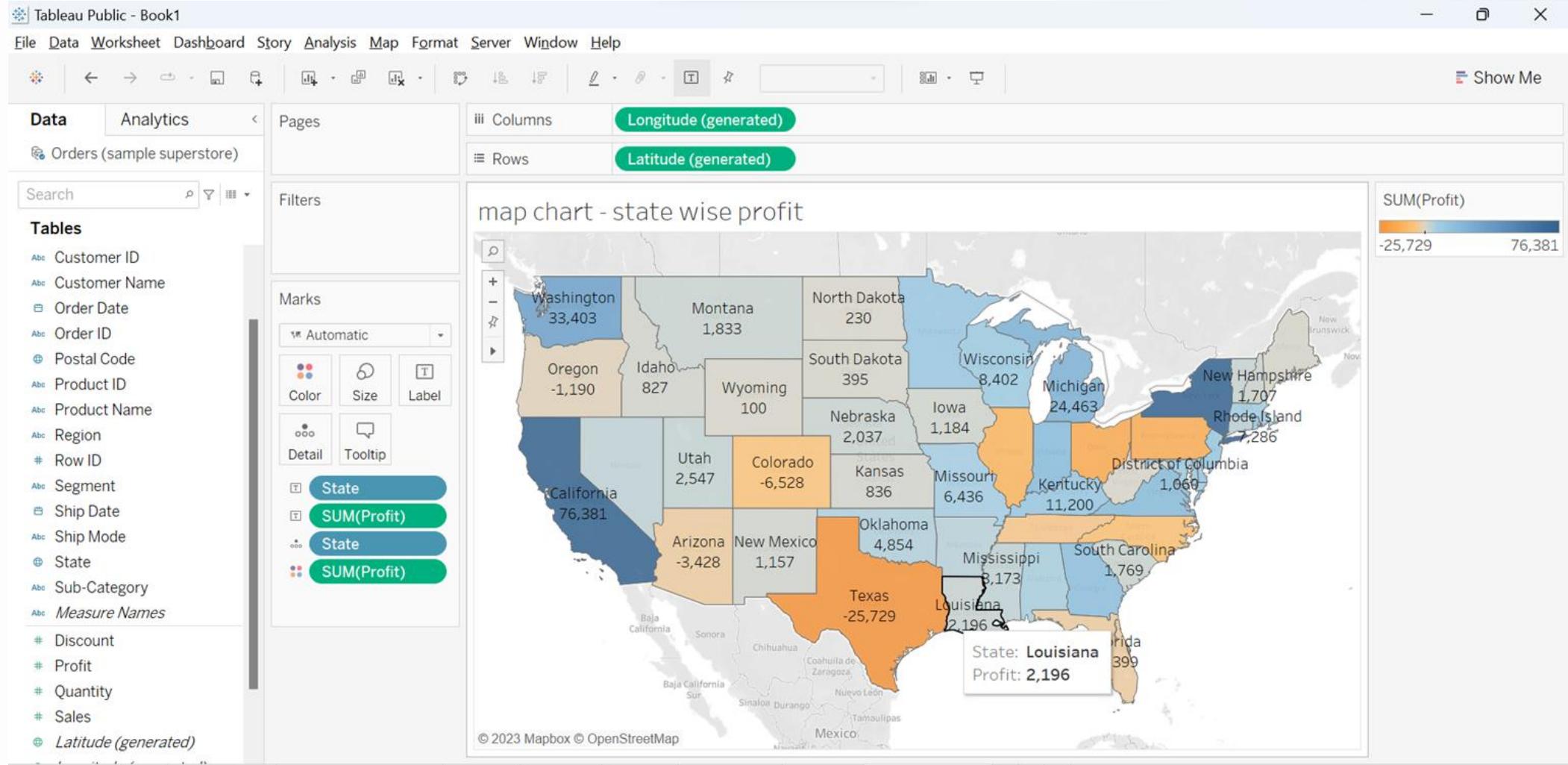


Heat Map - To Display Year-wise Sales of Each Subcategory





Map Chart – State-wise Profit



Formatting Your Visualizations



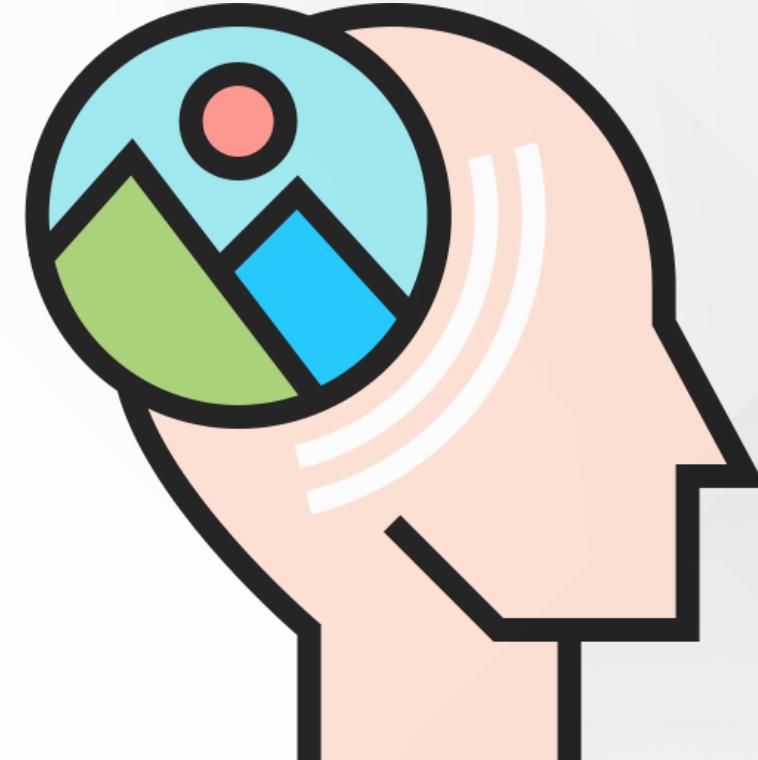


Formatting Your Visualizations

Why format visualization?

Choosing the right formatting is important to both analysis and presentation.

In Tableau, we can change the formatting for almost everything that we see on see on a worksheet, including fonts, shading, alignment, borders, and graph lines.





Format Text Alignments

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Standard

Format Alignment x

A Fields▼

Sheet Rows Columns

Default

Pane: ▾

Header: Custom ▾

Total

Pane: Automatic ▾

Header: Custom ▾

Grand Total

Pane: Automatic ▾

Header: Custom ▾

Pages

iii Columns Gender

Rows SUM(Age)

Filters

Marks

Automatic

Color Size Label

Detail Tooltip

Format

Gender

Age

90K 80K 70K 60K 50K 40K 30K 20K 10K 0K

Fema.. Male

Clear



Format Borders

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Format Borders

A Fields▼

Sheet Rows Columns

Default

Cell: ▾
Pane: None ▾
Header: None ▾

Total

Pane: ▾
Header: None ▾

Grand Total

Pane: ▾
Header: ▾

Column Divider

Pane: ▾
Header: ▾
Level: ▾

Clear

Pages

iii Columns Gender

Rows SUM(Age)

Filters

Marks Automatic

Color Size Label
Detail Tooltip

Format

Gender

Age

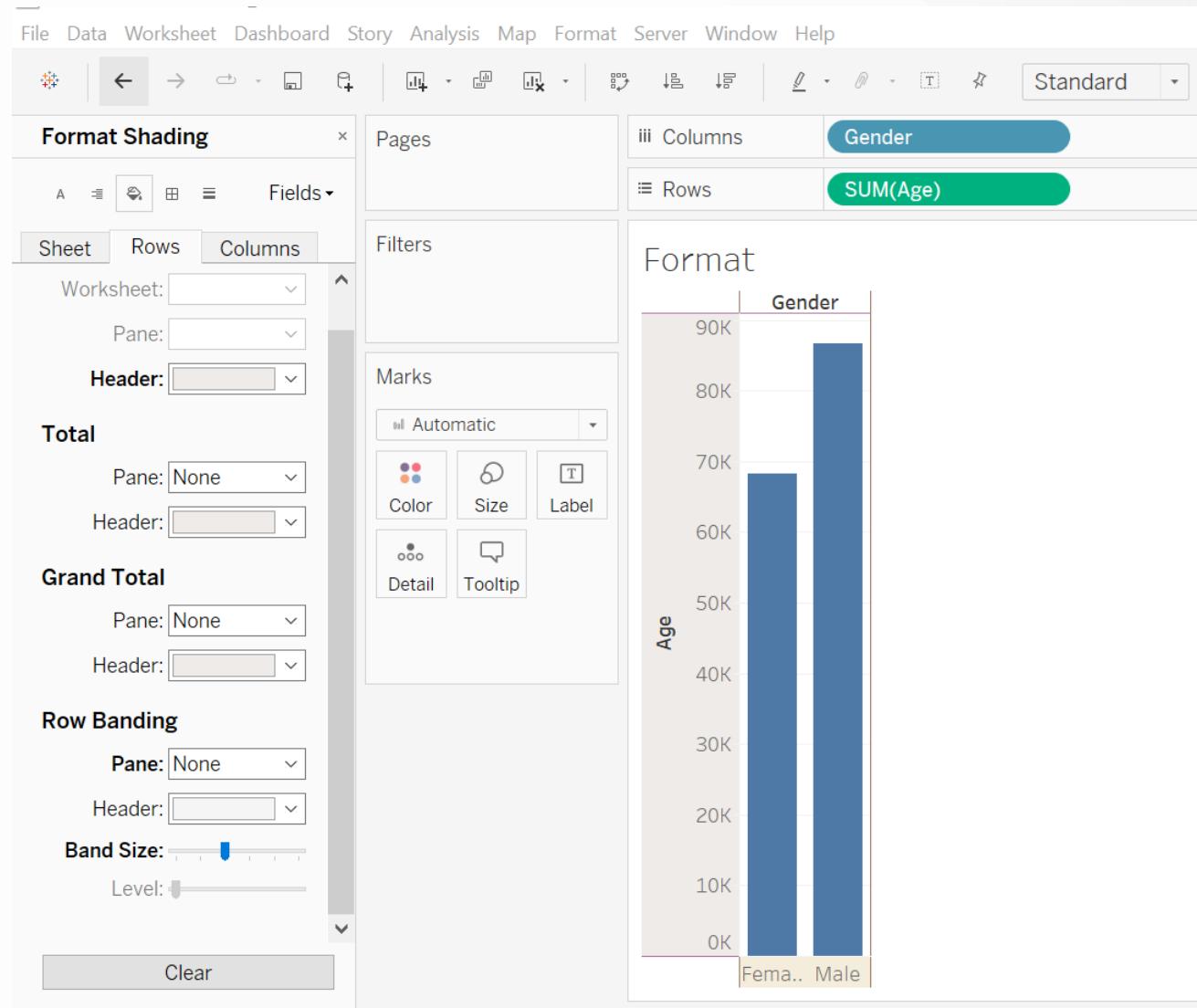
90K
80K
70K
60K
50K
40K
30K
20K
10K
0K

Fema.. Male

Gender	Age
Female	68K
Male	87K



Format Shading





Format Lines

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Standard

Format Lines x

Fields ▾

Sheet Rows Columns

Lines

Grid Lines: Dashed

Zero Lines: Dotted

Trend Lines: Solid

Ref Lines: Solid

Drop Lines: Solid

Axis Rulers: Solid

Axis Ticks: Dotted

Pages

Columns **Gender**

Rows **SUM(Age)**

Filters

Marks

Automatic

Color Size Label

Detail Tooltip

Format

Age

Gender

90K
80K
70K
60K
50K
40K
30K
20K
10K
0K

Fema.. Male

Clear

Organizing Data





Creating a Hierarchy

Hierarchies in Tableau provide drill-down capabilities.

The screenshot shows the Tableau interface with two main panes: Data and Analytics.

Data Pane: On the left, under Dimensions, the "Category" field is selected (highlighted with a blue bar). A large red circle with the number "1" is drawn around this selection. Below it, other dimensions listed include City, Country, Customer ID, Customer Name, Order Date, Order ID, Postal Code, Product ID, Product Name, Region, Row ID, Segment, Ship Date, Ship Mode, State, Sub-Category, and Measure Names.

Analytics Pane: On the right, under Dimensions, the "Sub-Category" field is selected (highlighted with a blue bar). A context menu is open over this field, showing options like Duplicate, Hide, Create, Transform, Convert to measure, Change data type, Geographic role, Group by, Folders, and Hierarchy. The "Hierarchy" option is expanded, and its submenu item "Create hierarchy..." is highlighted with a blue bar. A large red circle with the number "2" is drawn around this menu item. To the right of the menu, there are four data dropdowns: Automatic, Size, Abc 123, and Text. The "Automatic" dropdown is currently selected.



Creating a Hierarchy

Create Hierarchy

Name: Products

OK Cancel

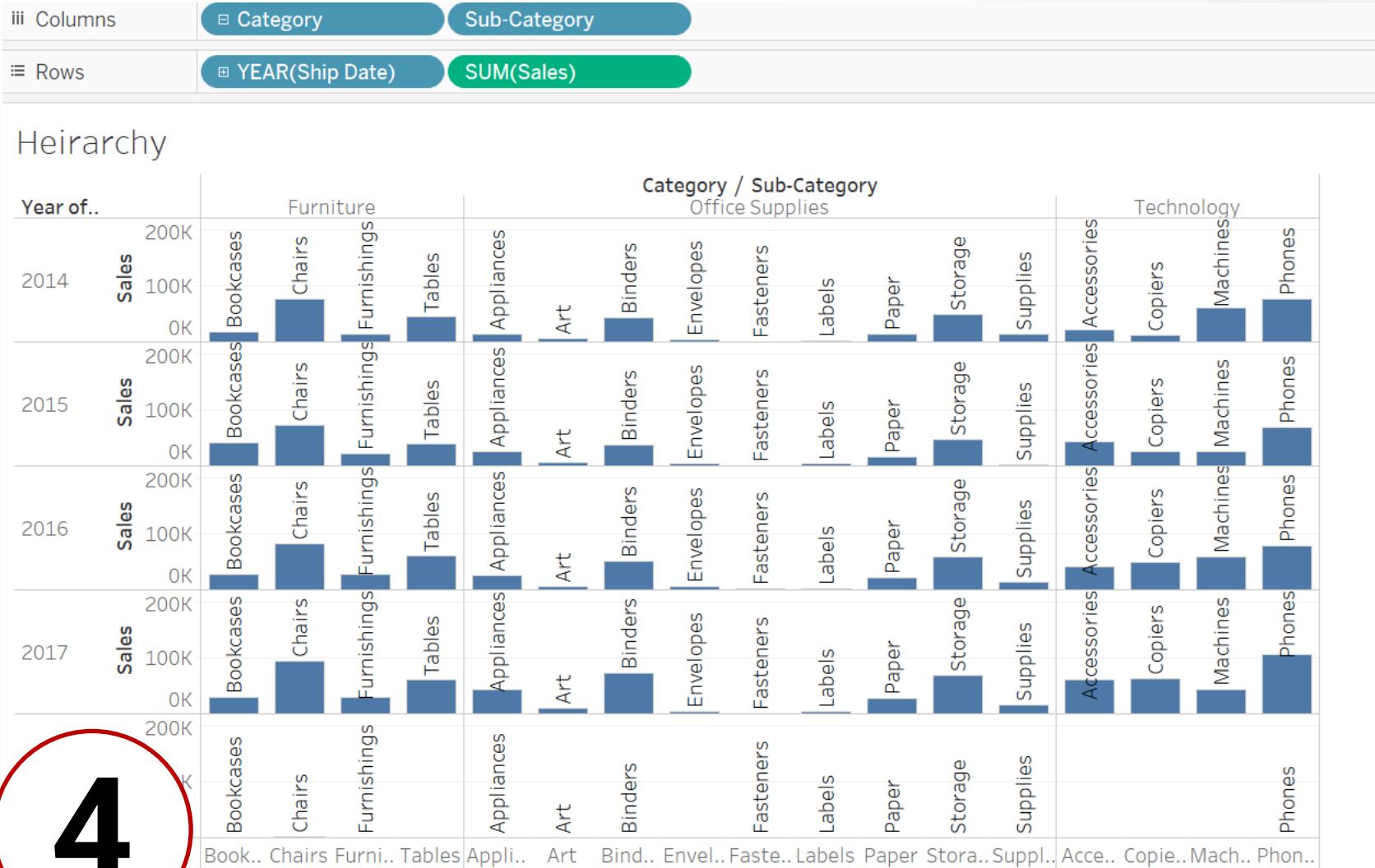
Dimensions

- ⊕ City
- ⊕ Country
- Abc Customer ID
- Abc Customer Name
- ⊕ Order Date
- Abc Order ID
- ⊕ Postal Code
- Abc Product ID
- Abc Product Name
- ⊕ Products
- Abc Category
- Abc Sub-Category

3



Creating a Hierarchy





Sorting

Sorting in Tableau helps to display data in an order such as alphabetic order or numeric order.

Columns: SUM(Sales)

Rows: Category, Sub-Category

1

Category	Sub-Categories
Furniture	Bookcases
	Chairs
	Furnishings
	Tables

2

Category	Sub-Categories
Furniture	Tables
	Furnishings
	Chairs
	Bookcases

3



Sorting a Specific Field

Columns: SUM(Sales)

Rows: Category Sub-Category

1

Sub-Category

- Filter...
- Show filter
- Sort...**
- Clear sort
- Format...
- Show header
- Include in tooltip
- Edit aliases...
- Dimension
- Attribute
- Measure
- Edit in shelf
- Remove

2

iii Columns: SUM(Sales)

Rows: Category Sub-Category

Sorting

Category	Sub-Category
Furniture	Chairs Tables Bookcases Furnishings
Office Supplies	Storage Binders Appliances Paper Supplies Art Envelopes Labels Fasteners
Technology	Phones Machines Accessories Copiers

Sort [Sub-Category]

Sort By: Field

Sort Order: Descending

Field Name: Sales

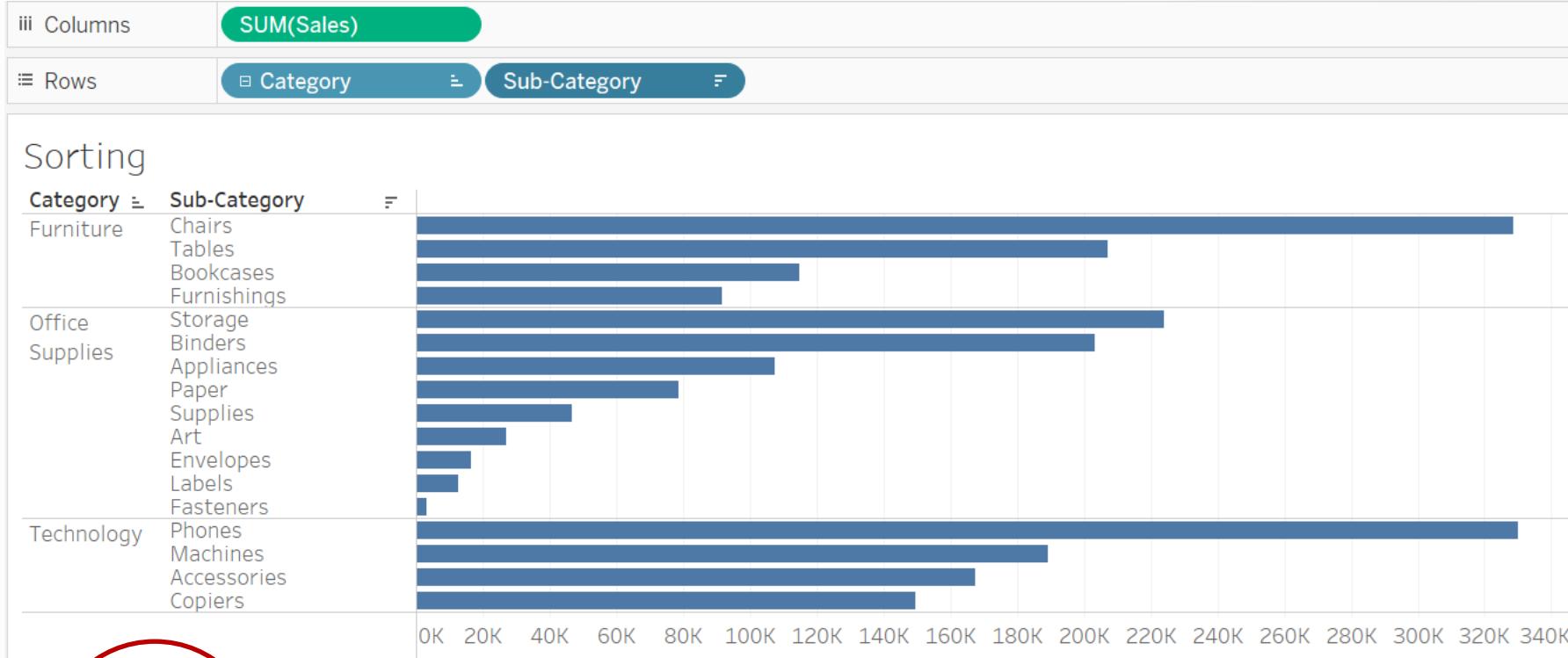
Aggregation: Sum

OK Cancel

3



Sorting a Specific Field



4



Creating a Set

A “Set” is a subset of your data that meets certain conditions based on the existing dimensions. A set allows you to create a subset of data based on some conditions. A set can be a computed set or a constant set.

The screenshot shows the Tableau Public interface with the following details:

- File Menu:** File, Data, Worksheet, Dashboard, Story, Analysis, Map, Format, Server, Window, Help.
- Toolbars:** Standard.
- Left Panel:** Shows the 'Data' tab selected. Under 'Tables', there are several dimensions like Customer Name, Order Date, etc., and measures like Sales, Profit, etc. The 'Sub-Category' field is highlighted with a blue selection bar.
- Context Menu:** A context menu is open over the 'Sub-Category' field, with 'Create' selected. Under 'Create', 'Set...' is highlighted with a blue selection bar.
- Sheet 1:** The main workspace is labeled 'Sheet 1'. It has two 'Drop field here' placeholder boxes. A 'Text' placeholder is also present.



Creating a Set

Tableau Public - Book1

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Data Analytics < Pages Columns Rows

Orders (sample superstore)

Search

Tables

- Customer Name
- Order Date
- Order ID
- Postal Code
- Product ID
- Product Name
- Region
- Row ID
- Segment
- Ship Date
- Ship Mode
- State
- Sub-Category
- top 5 Sub-Category Set**
- Measure Names
- Discount
- Profit

Filters

Marks

- Automatic
- Color
- Size
- Label
- Detail
- Tooltip
- IN/OUT(top ..)**
- SUM(Sales)**

Sheet

Sales

1600K
1400K
1200K
1000K
800K
600K
400K
200K

IN/OUT(top 5 Sub-Cate...
In
Out

Edit Set [top 5 Sub-Category Set]

Name: top 5 Sub-Category Set

General Condition Top

None

By field:

Top 5 by Sales Sum

By formula:

Top 10 by



Creating a Set

Tableau Public - Book1

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Show Me

Data Analytics < Pages Columns IN/OUT(top 5 Sub-Categories)

Orders (sample superstore) Rows SUM(Sales)

Search

Tables

- Customer Name
- Order Date
- Order ID
- Postal Code
- Product ID
- Product Name
- Region
- Row ID
- Segment
- Ship Date
- Ship Mode
- State
- Sub-Category
- top 5 Sub-Category Set**
- Measure Names
- Discount
- Profit
- Quantity
- Sales

Filters

Marks

- Automatic
- Color
- Size
- Label
- Detail
- Tooltip
- IN/OUT(top 5 Sub-Categories)**
- SUM(Sales)**

Sheet 2

In / Out of top 5 Sub-Categories

Sales

1,292,678
1,004,523

IN/OUT(top 5 Sub-Categories)
In
Out

Category	Sales
In	1,292,678
Out	1,004,523



Grouping in Tableau

A Group is a combination of dimension members that will constitute higher-level categories. A “group” allows you to combine members of different dimensions to constitute higher-level categories.

1

This screenshot shows the Tableau interface with a single state selected in the rows shelf. The rows shelf has one item: "State (group)". The data view displays sales data for individual states. The columns shelf includes "Category" and "State". The marks shelf shows "SUM(Sales)" as the aggregation method. The filters shelf is empty.

State	Furniture	Category	Office S..	Technol..
Alabama	6,332	4,209	8,969	
Arizona	13,525	10,006	11,751	
Arkansas	3,188	4,565	3,925	
California	156,065	142,352	159,271	
Colorado	13,243	7,899	10,966	
Connecticut	5,175	5,418	2,791	
Delaware	4,759	8,130	14,562	
District of Colum..	1,347	139	1,380	
Florida	22,987	19,519	46,968	
Georgia	8,321	26,716	14,059	
Idaho	2,595	950	837	
Illinois	28,275	19,908	31,984	
Indiana	11,497	15,735	26,323	
Iowa	2,642	783	1,154	
Kansas	111	1,051	940	

2

This screenshot shows the same Tableau interface, but now the rows shelf contains two items: "State (group)" and "California & Colo.". The data view shows sales data for California and Colorado grouped together. The columns shelf includes "Category" and "State". The marks shelf shows "SUM(Sales)" as the aggregation method. The filters shelf is empty.

State	Furniture	Category	Office S..	Technol..
Arizona	13,525	10,006	11,751	
Arkansas	3,188	4,565	3,925	
California	156,065	142,352	159,271	
Colorado	13,243	7,899	10,966	
Connecticut	5,175	5,418	2,791	
Delaware	4,759	8,130	14,562	

3

This screenshot shows the Tableau interface with a group of states selected in the rows shelf. The rows shelf has three items: "State (group)", "California & Colo.", and "Connecticut". The data view shows sales data for California, Colorado, and Connecticut grouped together. The columns shelf includes "Category" and "State". The marks shelf shows "SUM(Sales)" as the aggregation method. The filters shelf is empty.

State (group)	Furniture	Category	Office S..	Technol..
Alabama	6,332	4,209	8,969	
Arizona	13,525	10,006	11,751	
Arkansas	3,188	4,565	3,925	
California & Colo..	169,308	150,251	170,237	
Connecticut	5,175	5,418	2,791	
Delaware	4,759	8,130	14,562	
District of Colum..	1,347	139	1,380	
Florida	22,987	19,519	46,968	
Georgia	8,321	26,716	14,059	
Idaho	2,595	950	837	
Illinois	28,275	19,908	31,984	
Indiana	11,497	15,735	26,323	
Iowa	2,642	783	1,154	
Kansas	111	1,054	849	
Kentucky	12,127	11,894	12,571	
Louisiana	2,963	3,423	2,831	



Grouping in Tableau

4

The screenshot shows the Tableau Data pane with the 'Data' tab selected. In the 'Tables' section, there is a list of data items. A red circle highlights the number '4' next to the 'Products' item, which is expanded to show its sub-categories: Category, Sub-Category, Random Sub-Category, Region, Row ID, Segment, Ship Date, Ship Mode, State, and State (group). Below this, there is a section for 'Measure Names' containing Discount, Profit, Quantity, Sales, and Latitude (generated).

- Postal Code
- Product ID
- Product Name
- Products
 - Category
 - Sub-Category
 - Random Sub-Category
 - Region
 - Row ID
 - Segment
 - Ship Date
 - Ship Mode
 - State
 - State (group)
- Measure Names
 - Discount
 - Profit
 - Quantity
 - Sales
 - Latitude (generated)

5

Pages	iii Columns	Category
	Rows	State (group)



Creating Filters

Filtering allows one to display records from the data source that meet certain criteria. By applying a filter, you can limit the data in a view without altering the design of the underlying object. Filtering allows the exclusion or inclusion of certain values for a field. One can use filters to display specific records in a form, report, query, or datasheet.

A screenshot of a data visualization tool's filter interface. At the top, there are two columns labeled "Columns": "YEAR(Order Date)" and "QUARTER(Order Date)", both with a minus sign icon. Below them, under "Rows", is a green button labeled "SUM(Sales)".

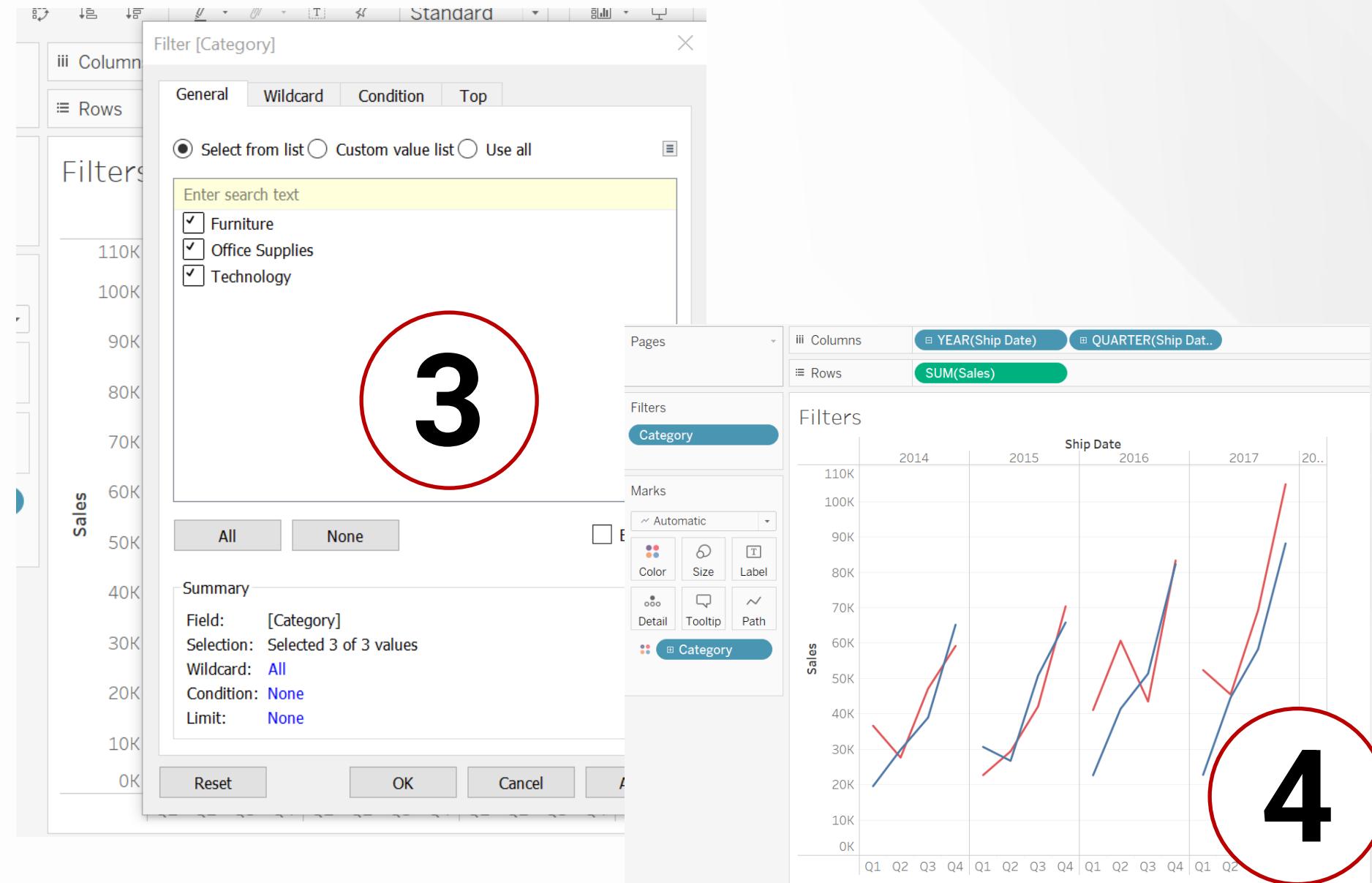
1



2



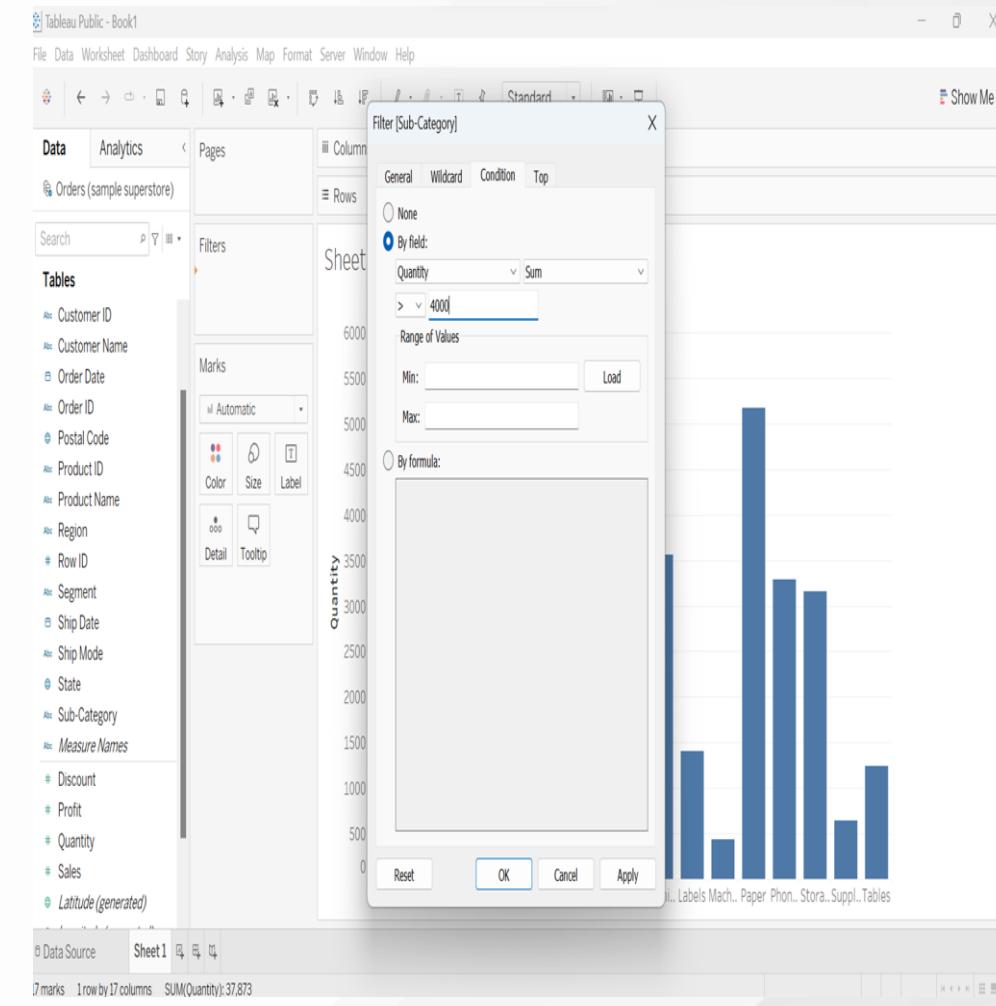
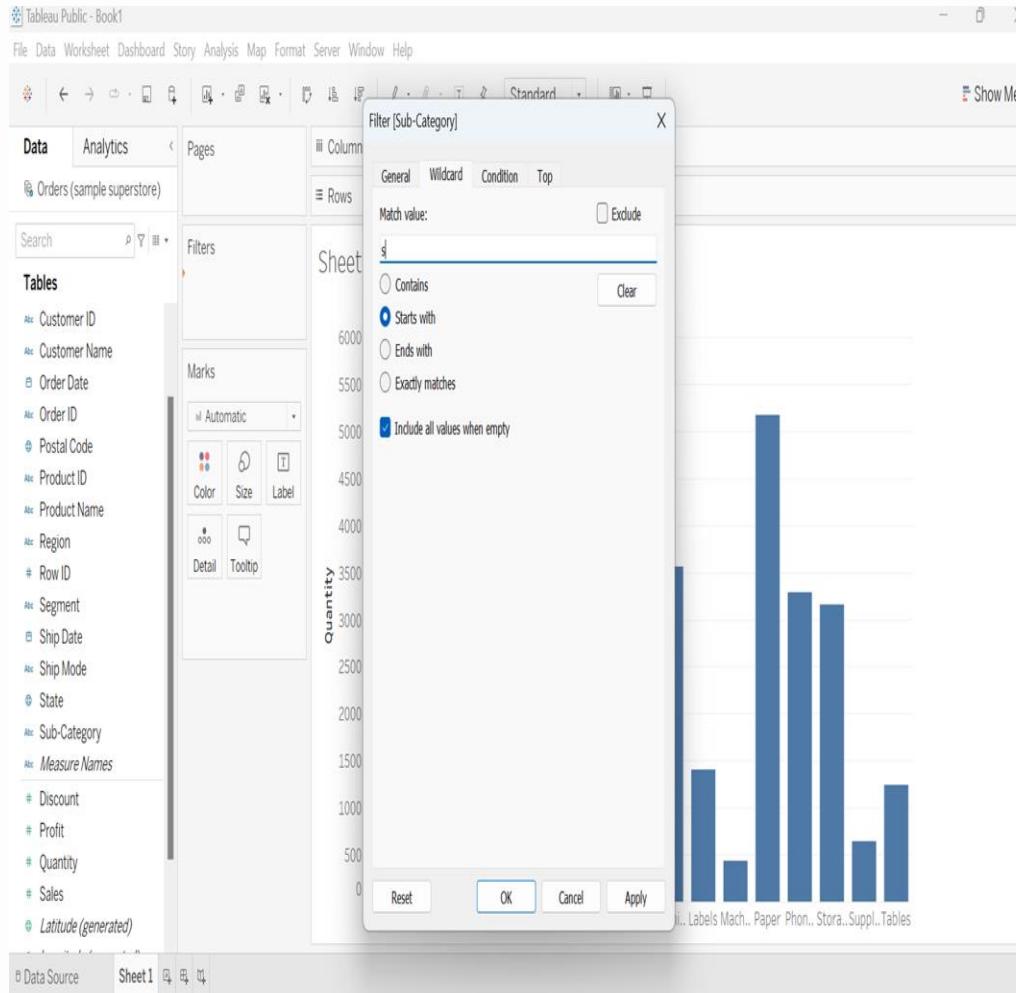
Creating Filters





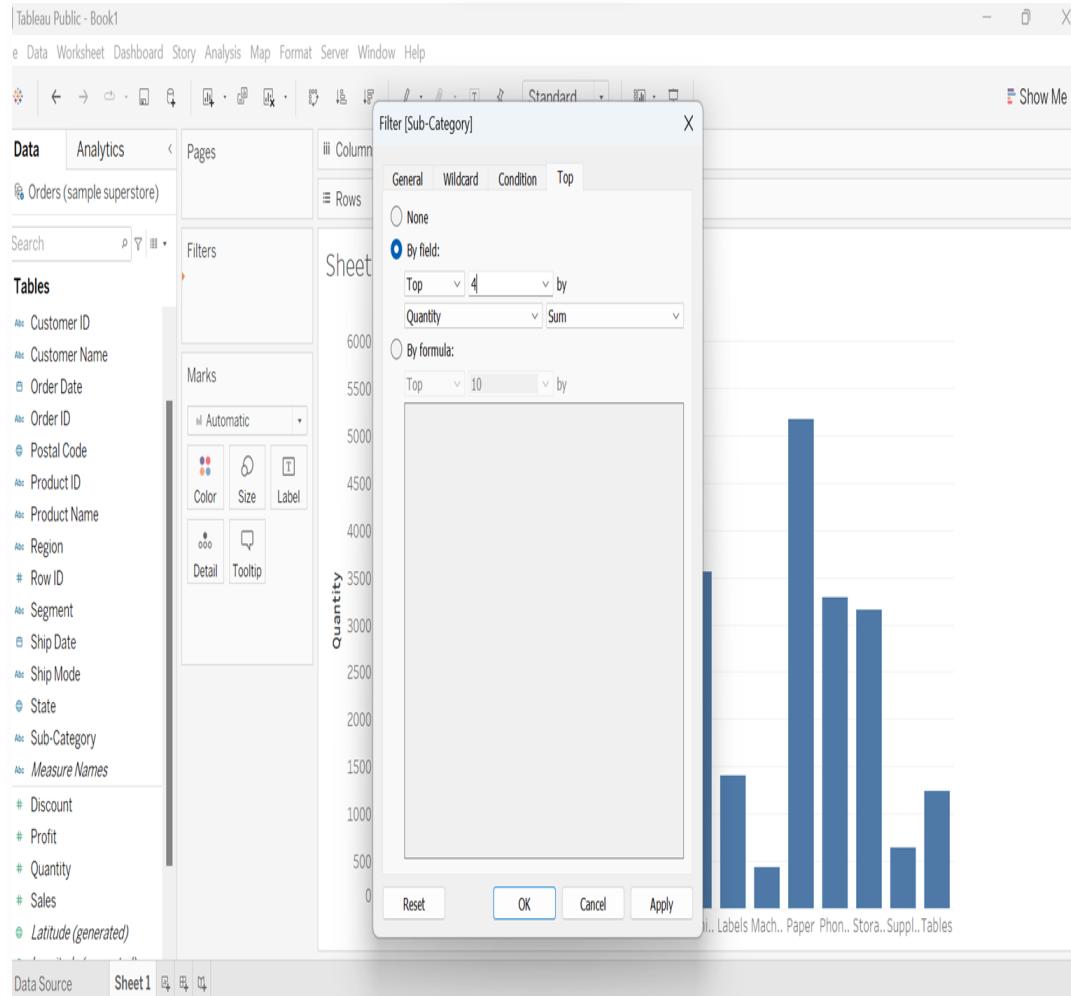
Creating Filters

- Wildcard filter helps to filter data in the visual based on the pattern match
- Condition filter helps to filter data in the visual based on a condition set





Creating Filters

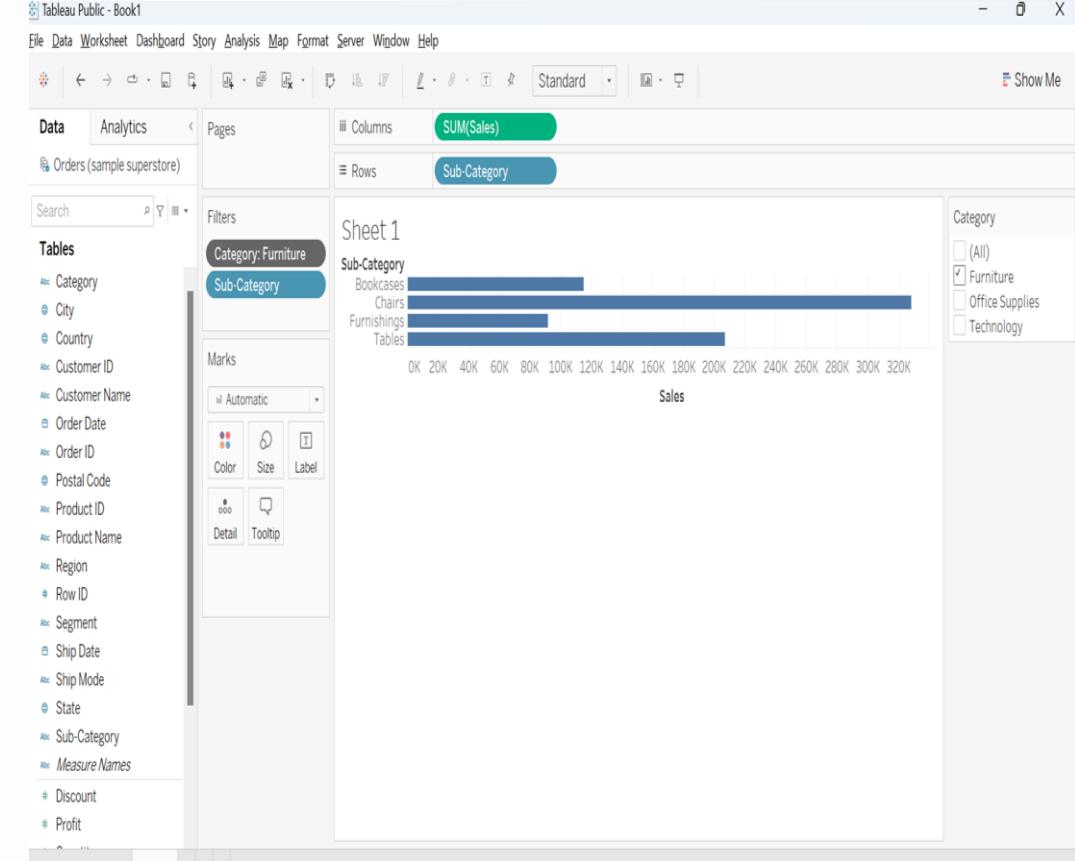
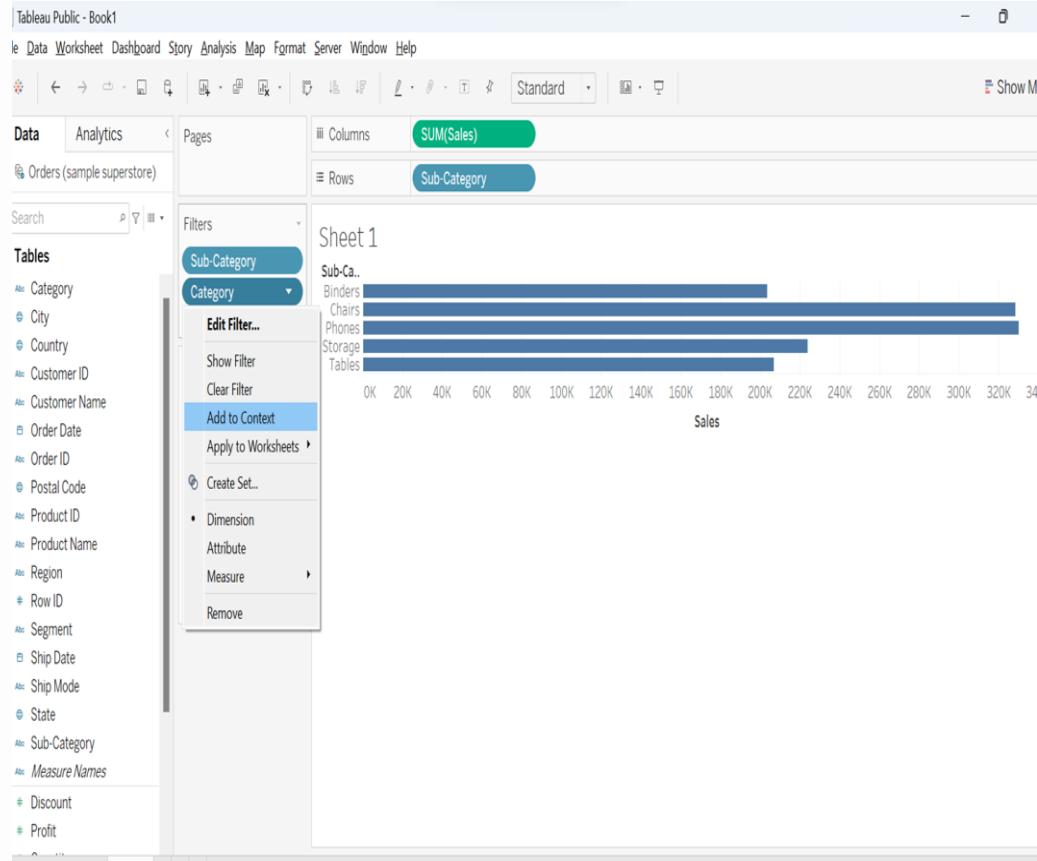


We have the top filter to filter top n or bottom n values in the visual based on the measure in that visual.



Creating Filters

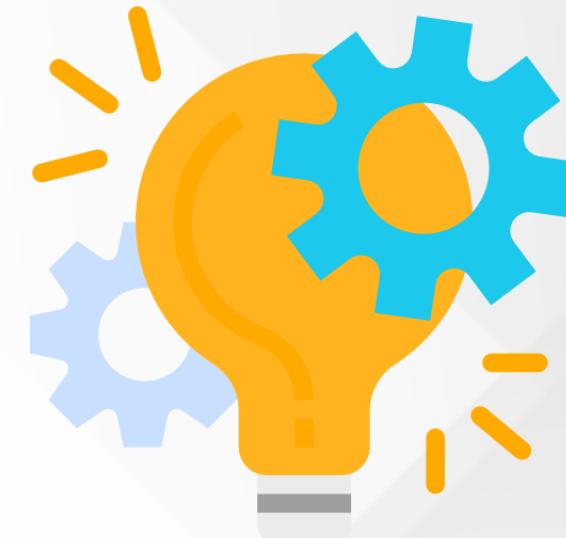
Context filter - In context of one filter, the other filter gets changed. Here, we set the category as context filter for the subcategory filter.





Parameter

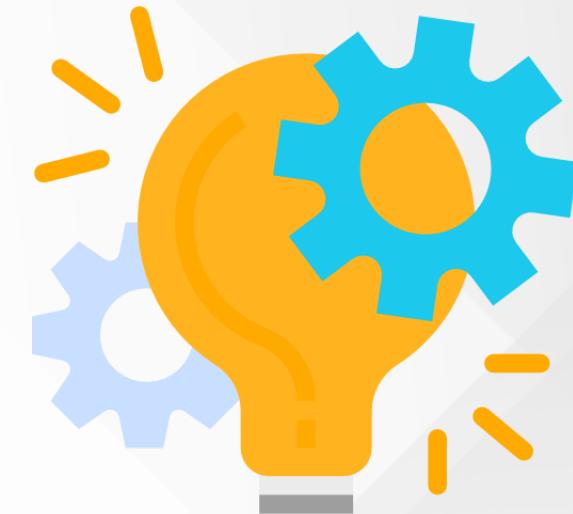
- Parameters are dynamic values that can replace constant values in calculations, filters and reference lines
- Parameter values can be:
 - Defined by the report creator
 - Entered as an input by the report consumer

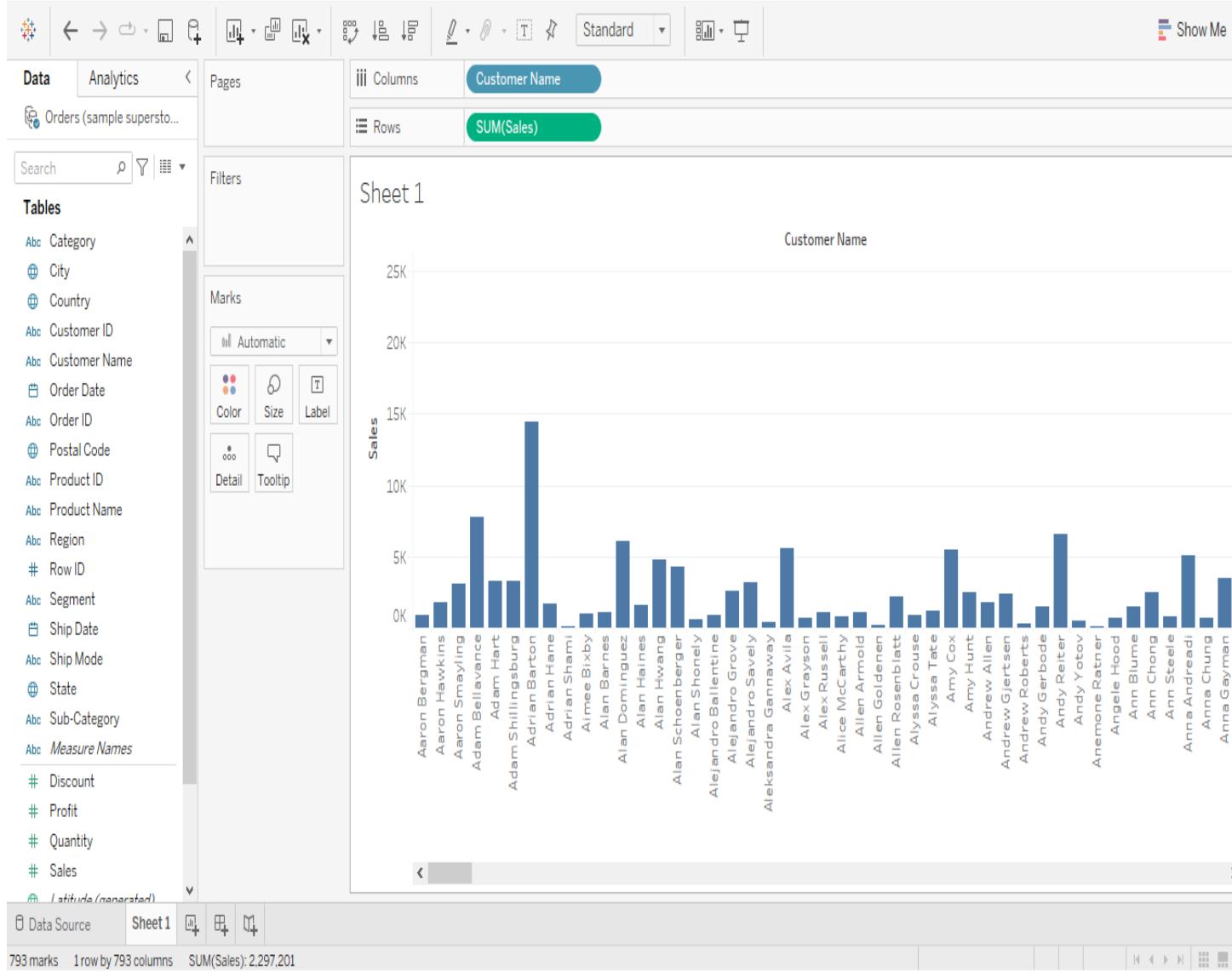




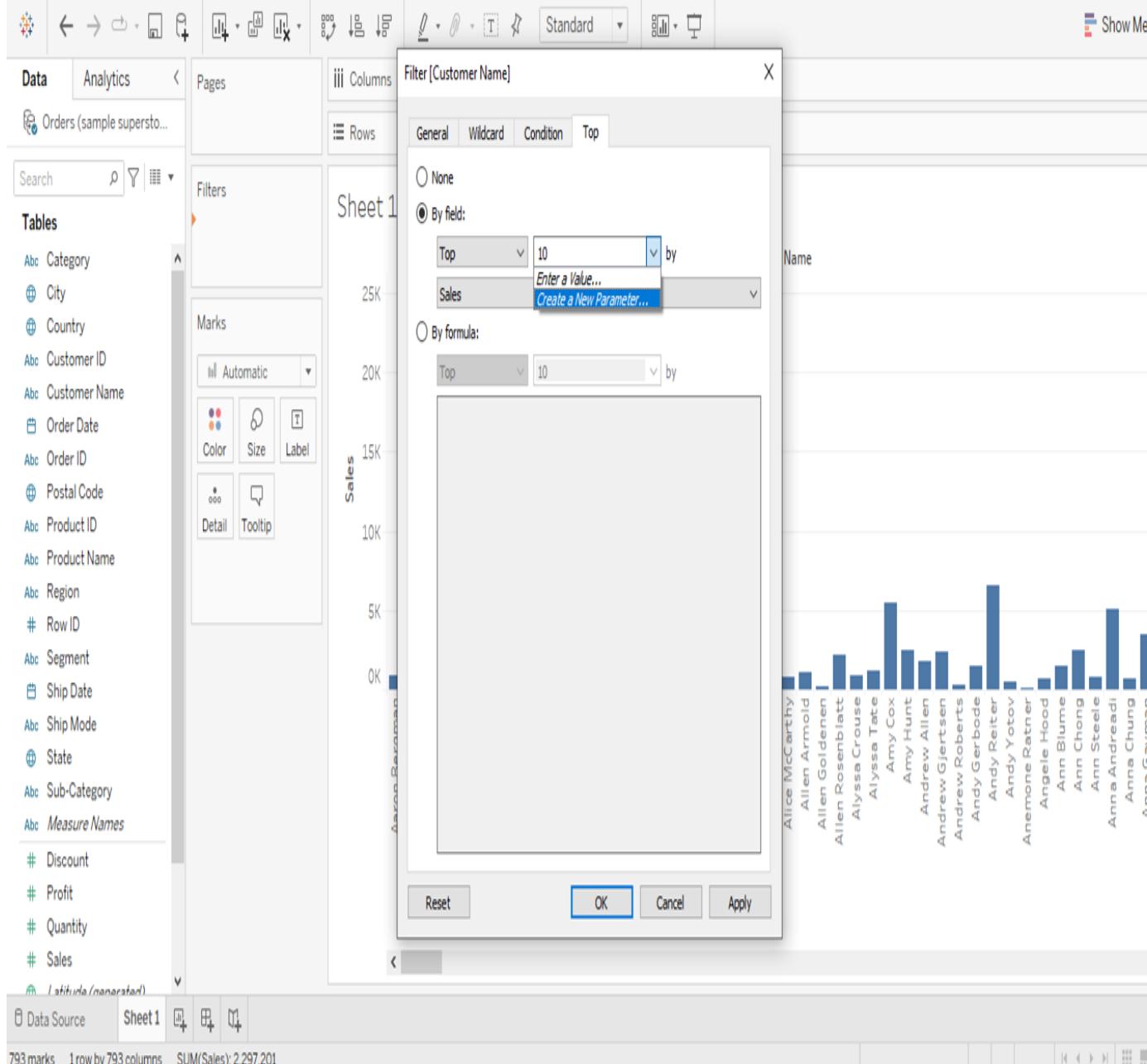
How to Use Parameter?

- **Build Parameter:** This is the direct way is to right click on the white space of the data pane and select “Create parameter.”
- **Show Parameter Control:** right click on the desired parameter in the parameters section of the data pane. Select “show parameter control” and parameter control will appear in the visualization like a filter control.





- For using parameter, we need to prepare a visualization, so we are plotting sales of each customer.
- We put customer name field in columns shelf and sales field in rows shelf.



- We will filter customer name column by dragging the customer's name column in filters pane.
- We will select the “top” filter.
- Under the value box, we will select the “create a new parameter” option from drop down menu and click “ok.”

Tables

- Abc Category
- Abc City
- Abc Country
- Abc Customer ID
- Abc Customer Name
- Abc Order Date
- Abc Order ID
- Abc Postal Code
- Abc Product ID
- Abc Product Name
- Abc Region
- # Row ID
- Abc Segment
- Ship Date
- Abc Ship Mode
- State
- Abc Sub-Category
- Abc Measure Names
- # Discount
- # Profit
- # Quantity
- # Sales
- (1st time / generated)

Data Analytics Pages

Orders (sample superstore)

Search

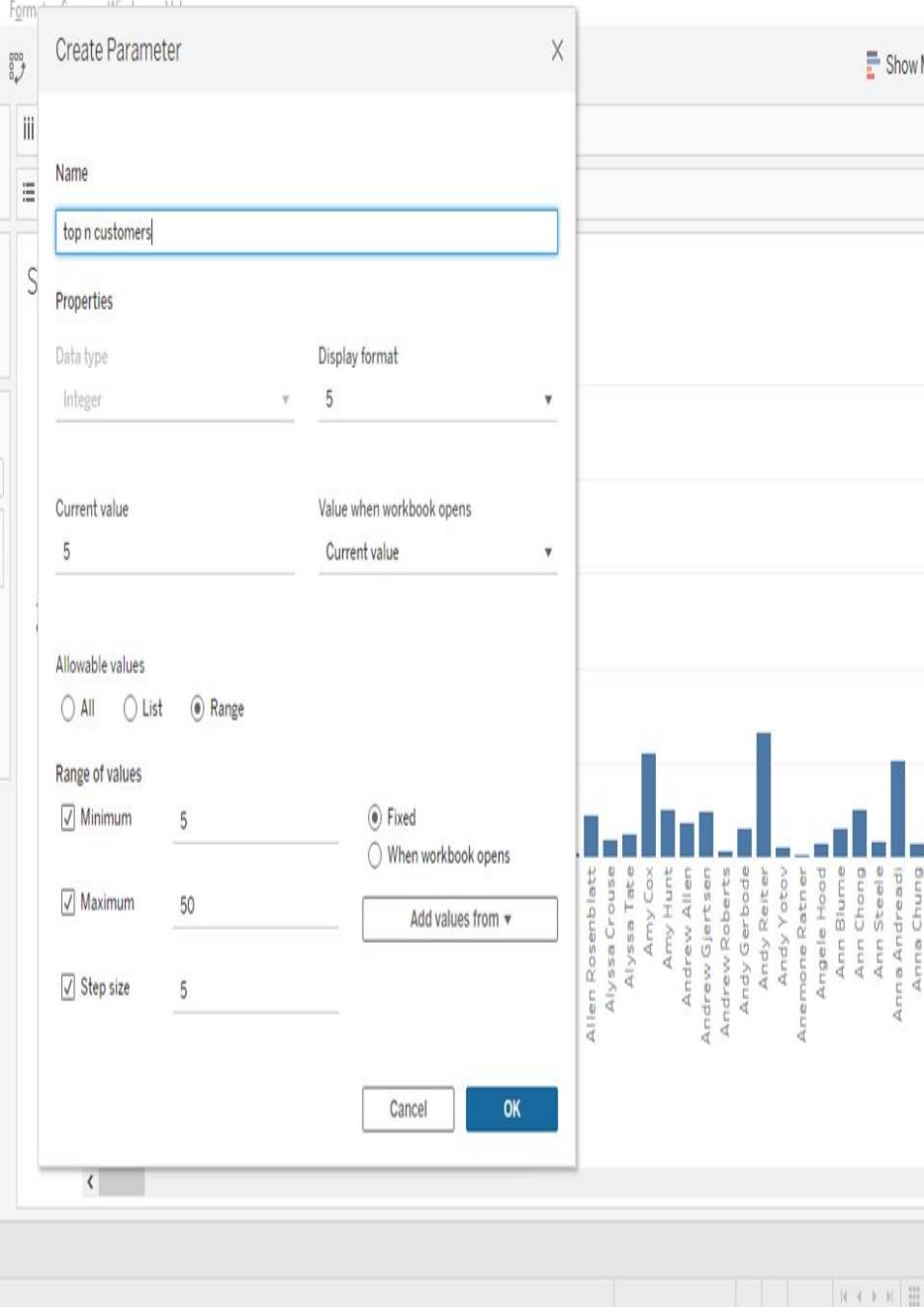
Marks

Automatic

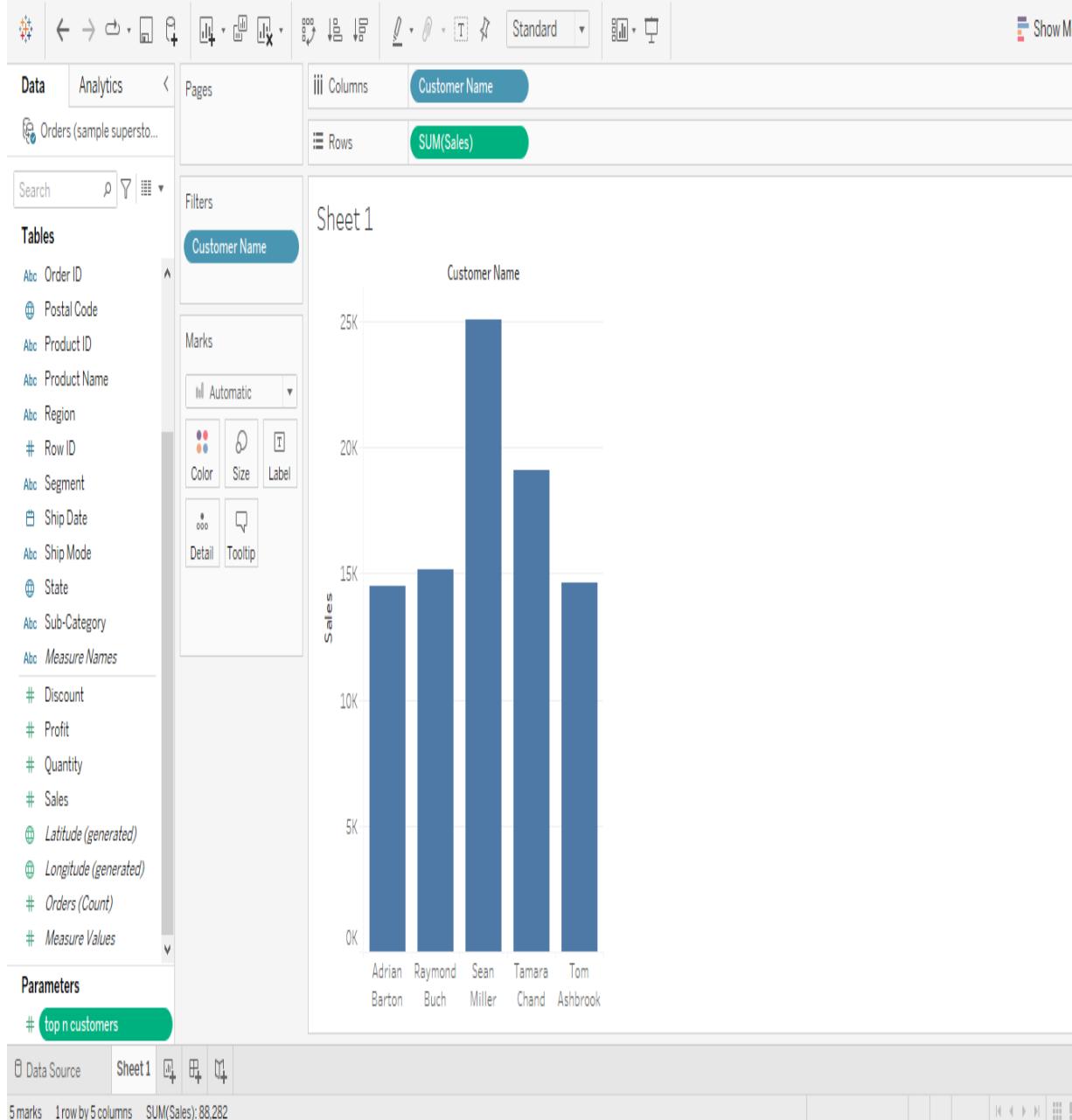
Color Size Label

Detail Tooltip

793 marks 1 row by 793 columns SUM(Sales): 2,297,201



- In the “create parameter” dialog box, we name the parameter as “top n customers.”
- The current value is set as 5; means starting point of the parameter.
- We select range option and set the maximum and minimum values as 5 and 50 with step size of 5; means starting point as 5 and ending point as 50 skipping 5 values every time like 5,10,15,20...



- The parameter that we have created “top n customers” is getting displayed below the measures in the data pane with green pill.
- Clicking on the down arrow of the parameter, we can select “show parameter” option.
- The parameter will be displayed to the right side below show me option.
- We can scroll the parameter to see the top n customers based on the requirement.



Customer Name

Rows: SUM(Sales)

Filters

Customer Name

Tables

Abc Category

@ City

@ Country

Abc Customer ID

Abc Customer Name

@ Order Date

Abc Order ID

@ Postal Code

Abc Product ID

Abc Product Name

Abc Region

Row ID

Abc Segment

@ Ship Date

Abc Ship Mode

@ State

Abc Sub-Category

Abc Measure Names

Discount

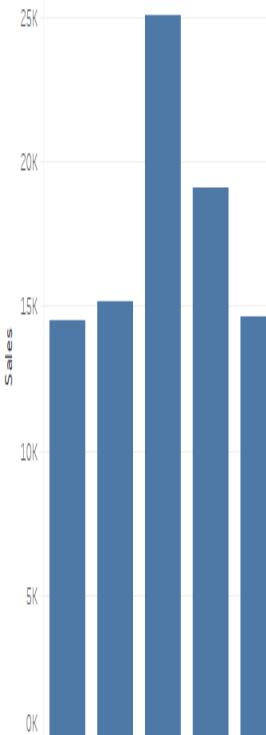
Profit

Parameters

top n customers

Sheet1

Customer Name


 Adrian Barton
 Raymond Buck
 Sean Miller
 Tamara Chand
 Tom Ashbrook

Data Source Sheet1

5 marks 1 row by 5 columns SUM(Sales): 88,282



Customer Name

Rows: SUM(Sales)

Filters

Customer Name

Tables

Abc Category

@ City

@ Country

Abc Customer ID

Abc Customer Name

@ Order Date

Abc Order ID

@ Postal Code

Abc Product ID

Abc Product Name

Abc Region

Row ID

Abc Segment

@ Ship Date

Abc Ship Mode

@ State

Abc Sub-Category

Abc Measure Names

Discount

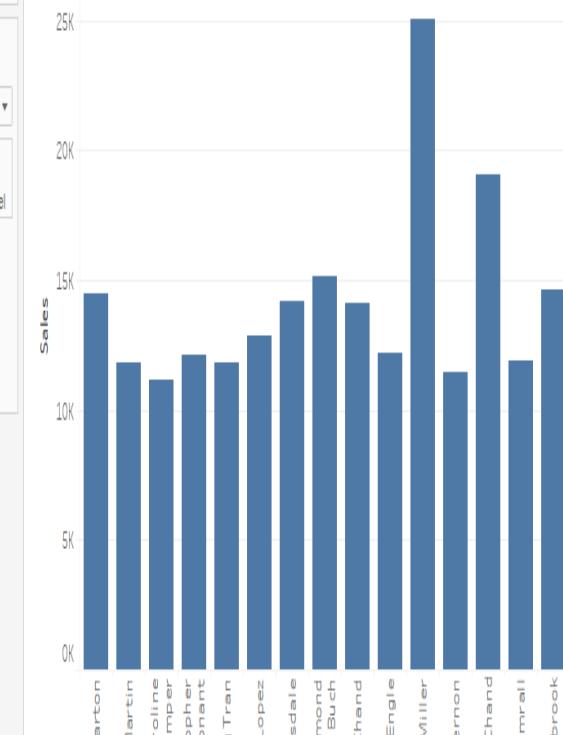
Profit

Parameters

top n customers

Sheet1

Customer Name


 Adrian Barton
 Becky Martin
 Caroline Jumper
 Christopher Conant
 Greg Tran
 Hunter Lopez
 Ken Lonsdale
 Raymond Buch
 Sanjit Chand
 Sean Miller
 Seth Vernon
 Tamara Chand
 Todd Sumrall
 Tom Ashbrook

Data Source Sheet1

5 marks 1 row by 5 columns SUM(Sales): 88,282

top n customers

15

0



Summary

You reached the end of the session. Now, you should be able to:

- Understand Tableau and its importance.
- Work on the interface and identify dimension and measures.
- Connecting to the Data
- Create different visuals with appropriate data.
- Format visuals based on line, color, border, etc.
- Organize data using different ways.





Thank You!

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