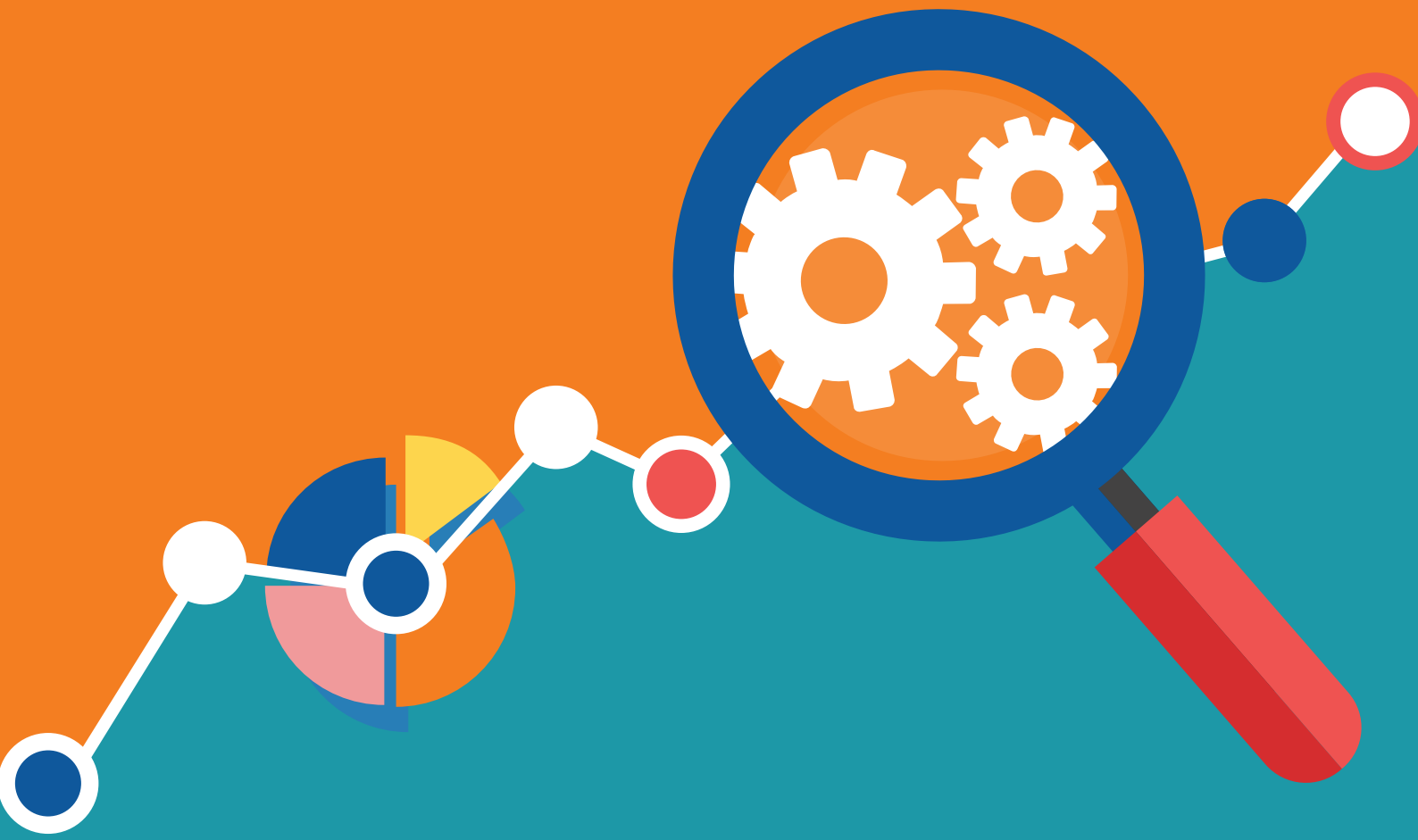
SECRETS TO UNLOCKING TABLEAU'S HIDDEN POTENTIAL



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As a suite of business intelligence software with a range of data visualization products, Tableau was declared the market leader with highest execution ability by Gartner, in 2015. The software has been very useful at deciphering data with great accuracy, easing the job of data analysts and data scientists.

However, while one may be putting this software to good use, certain features of the platform tend to get overlooked by most users. This eBook will help you unleash Tableau's immense potential. Discover hidden functionality, explore unused features, and learn how to extract the maximum from the tool.

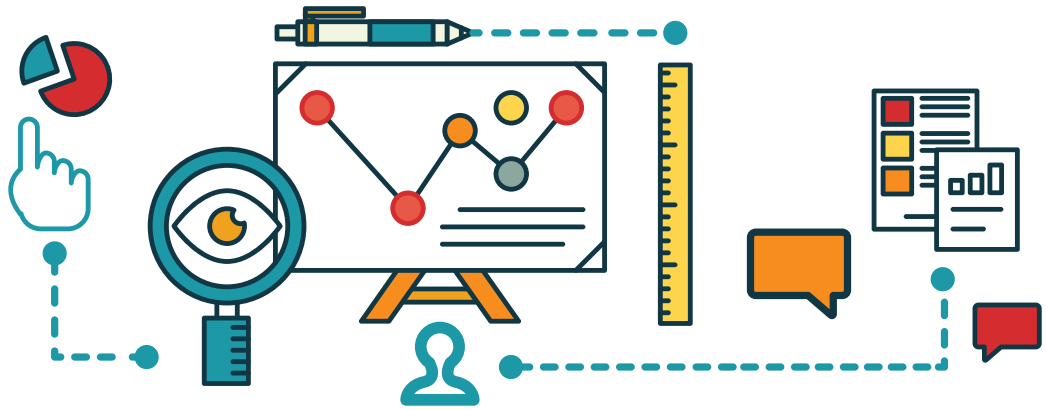
WHY **TABLEAU, AT ALL?**

In today's world, an increasing number of organizations are using data-driven insights and analytics to maximize profits. From sales and marketing to opportunity management and customer relationship management, timely decision-making relies upon quick and efficient analysis of data.

With Tableau, it is not only easier and quicker to produce data visualizations, but it also allows for instant visual feedback of your data, which is a huge help for analytics teams. Apart from being able to extract useful information from visuals, Tableau also helps you with preparing data in a faster, more scalable, and more extensible manner (with its advanced Server).

We will begin by talking about 10 useful tips for Tableau users at any level of experience.

TIPS TO GET THE MOST OUT OF THE WORLD'S FAVORITE ANALYTICS PLATFORM



1 Use Excel for refined control

Begin with Excel spreadsheets rather than with databases. This way you'll have better control over the tool. Changes made to the Excel spreadsheet will quickly reflect on your Tableau visualization. Try making changes to watch how the representation changes on Tableau to get a feel for the calibration.

2 Clean the data for optimized performance

And before you use your data on Tableau, be sure to clean it up. You do not want a mixture of upper and lower-cases, missing values, and mixed formats of data to mess up the process. **With Tableau, data should be as clean as possible.**

To clean the data, you can: use Excel's data formatting tools; export the data into a CSV format and then clean it up manually or by using automated tools like Google Refine; or even a Python script to clean up your data source.

3 Normalize data for enhanced efficiency

The next thing for you to note is that **data should be normalized**. For instance, on most spreadsheets, there will be more than one column to represent Date and Time. Make sure that you have no more than two columns to represent this data.

Secondly, rows of repeated data, often referred as "groupings" could be represented in two separate spreadsheets. Repeated data should be split into two or more worksheets. This makes it easy for Tableau to process the data.

4 Integrate and channel demographic data from the web

Awareness of demographic data on the web will be helpful. A lot of public sources of data available on the web let you use your data in many beneficial ways. For instance, when you have to calculate result per capita, you can load census data that is available on the web into your Tableau workbook, and then use either data joining or data blending methods to create meaningful results.

5 Integrate geographic and map data from the web

Awareness of various sources of maps available on the web is another advantageous factor. You can load the map to Tableau and input its "origin" latitude and longitude on the map. You would thus not have to rely solely on maps provided by Tableau to create impressive visualizations, this way.

6 Supplant Tableau with compatible analytics tools

Awareness of useful analytics tools for Tableau will help smoothen workflow and simplify the process. For instance, if you wanted to perform regression analysis, you could do it without having to get your hands dirty with coding work. The functions are freely available with the Tableau community. You can browse through and choose from them depending on the demands of the task.

7 Create dashboards with multi-level views for enhanced credibility

Create dashboards that support a high-level view (with a map), and at least one lower-level view. By presenting the aggregated data at the top of the screen and the detailed data at the bottom, you will help clients and end-users correlate the data, which in turn builds a sense of confidence in their minds, helping them trust the data more.

8 Learn how to embed Tableau visualization into SharePoint

You could also **learn how to embed your Tableau visualization into Microsoft SharePoint.** By adding SharePoint's Page Viewer web part to your SharePoint page, you can use the PermaLink that Tableau creates for you.

9 Insta-demos!

You could use Tableau Public to instantly create interesting demos. If the data is clean and in decent shape, with some experience using the software, you should be able to create an impressive demonstration with no more than a few hours of work.

10 Tableau's comprehensive knowledge base

Lastly, do not forget to tap into Tableau's **knowledge base**. Regularly reviewing the knowledge base articles could save you a lot of your time on your projects.

These clever tips come from Mark Smith of 7B Software, Inc.

10 HIDDEN FEATURES OF TABLEAU 9 TO EXPLORE

Time to talk about a few Tableau 9 features that many users tend to overlook - or miss altogether!

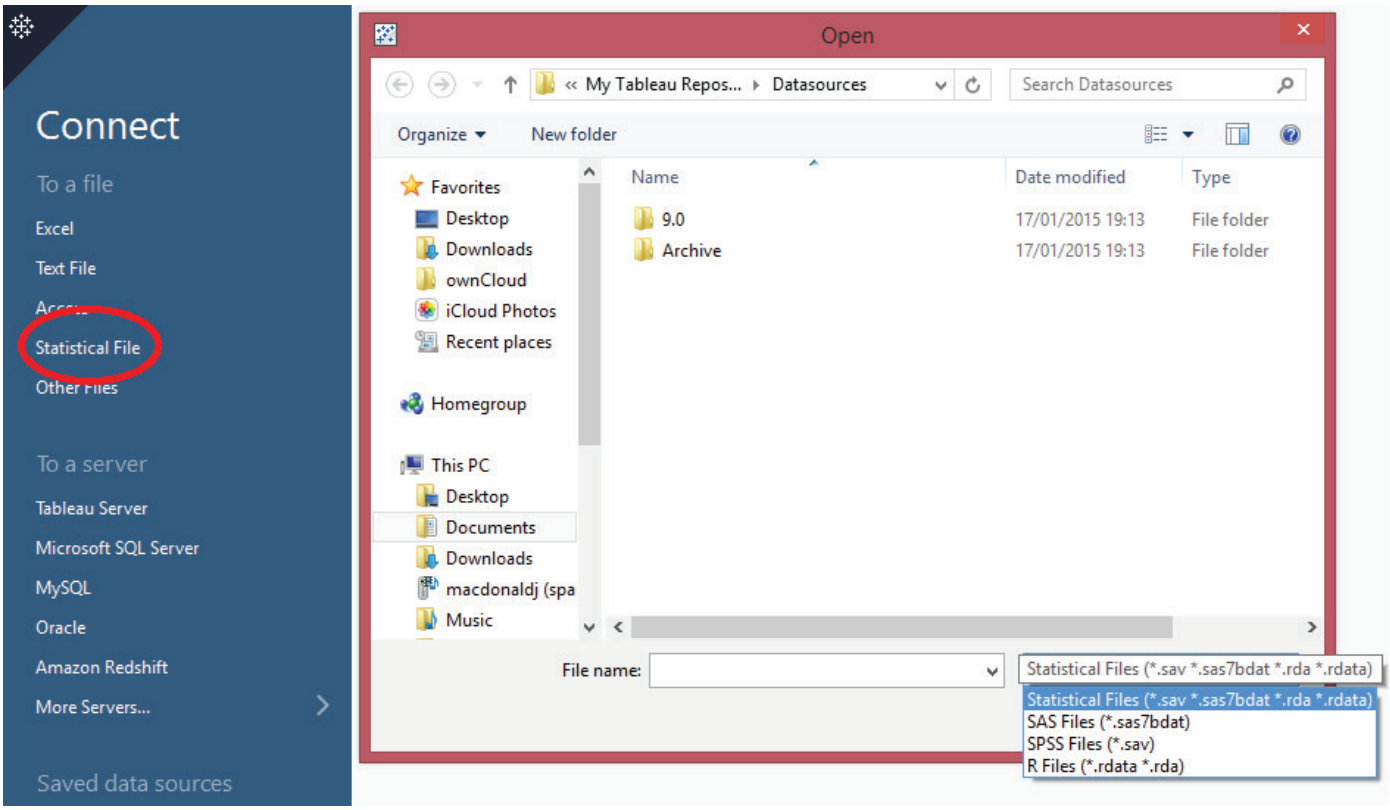
1 Visualize stat files

Your stat files can be visualized in Tableau. The direct connectors that are available in Tableau help you do this. This native support is available for a number of statistical packages, including -

.sav – the binary file format used by SPSS

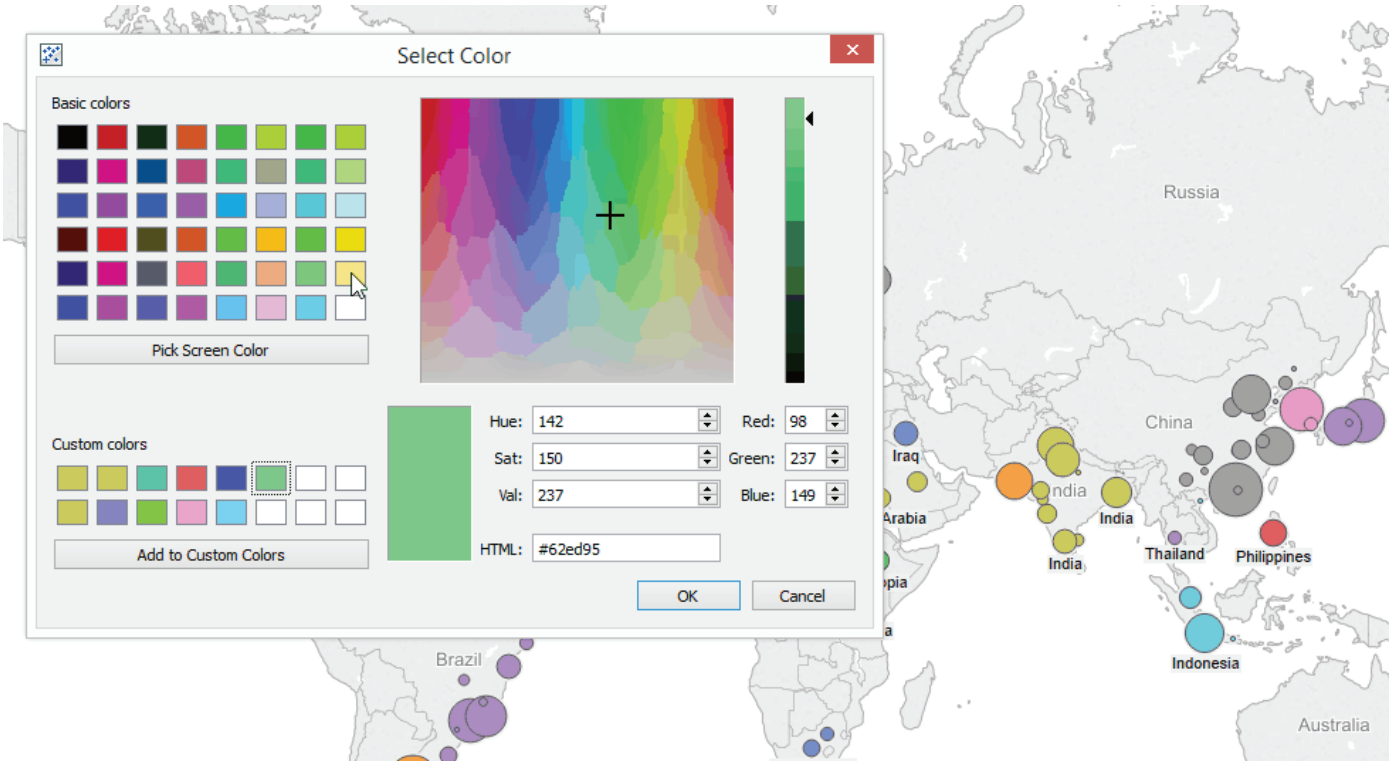
.sas7bdat – the file format used by SAS

.rdata, .rda – the file formats enjoyed by the R statistical analysis package



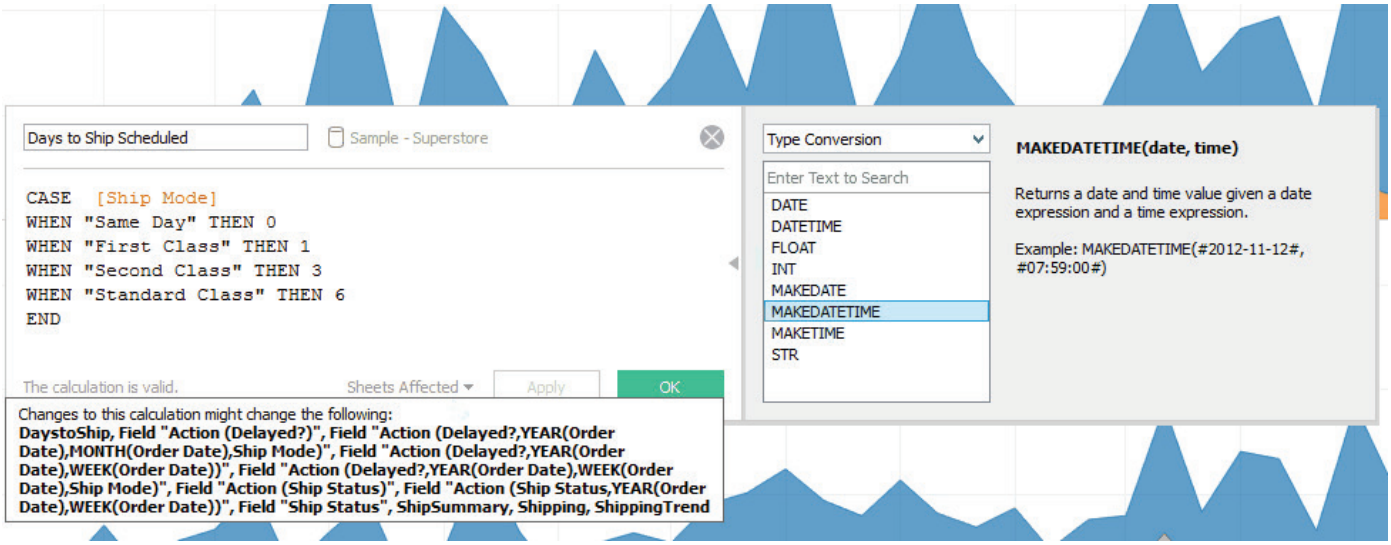
2 Add a dash of color

There is also the all new, updated color palette dialogue box. With this you can specify hex values for the colors you are using. What's more, you can also pick and drop colors from your desktop to the palette.



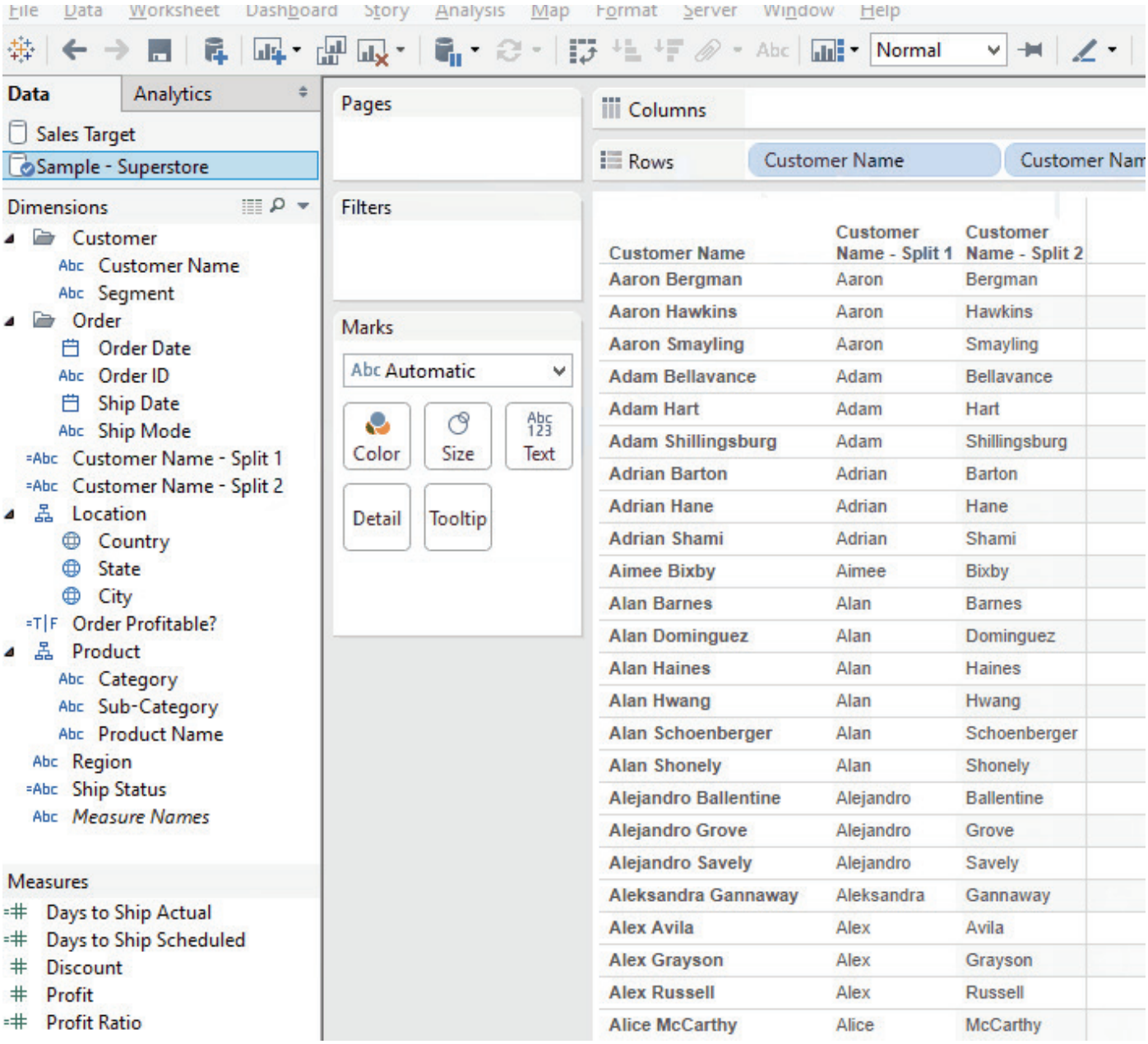
3 UI features to explore

Tableau 9 comes with a minimalist calculation window. This will help you auto-complete your typing with suggestions in dimensions, measures, and formulas. Apart from this, there also a convenient formula drop-down to the right, complete with explanations and use case examples. These little features make working with Tableau that much easier. Some new formulae that were included in version 9 were the RANDOM( ), HEXBIN, and REGEXP functions.



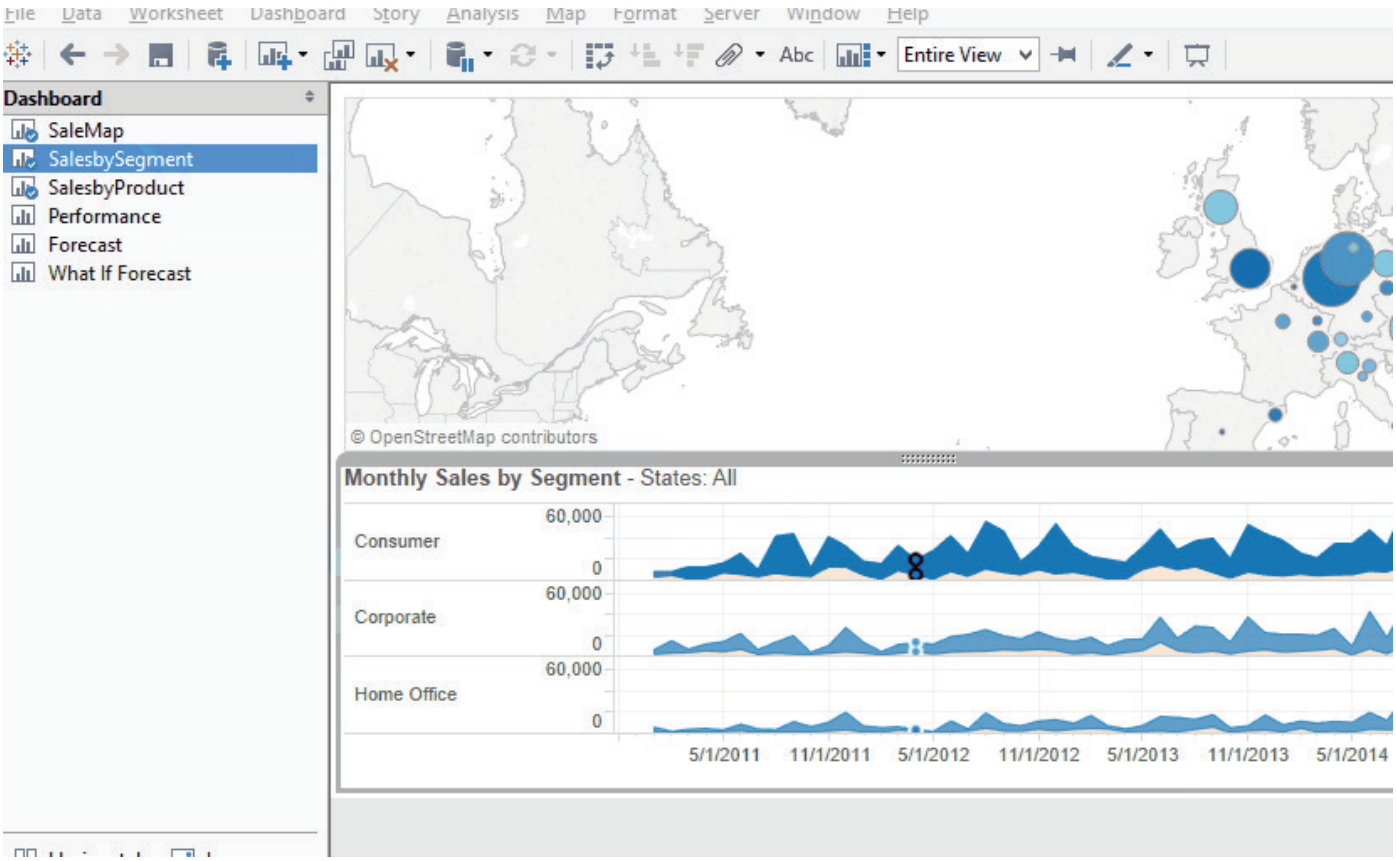
4 Making text-to-columns effortless

With the latest version of Tableau, the conversion of text to columns has been made easy. Instead of having to rely on Excel, SQL, or a calculated field of LEFTs and RIGHTs, you could simply right-click on the dimension you want to split in Tableau, navigate to the new 'Transform' menu, and hit Split. Tableau will then automatically try to figure the delimiter and split the data. Another option is to specify the delimiter yourself using the Custom Split option.



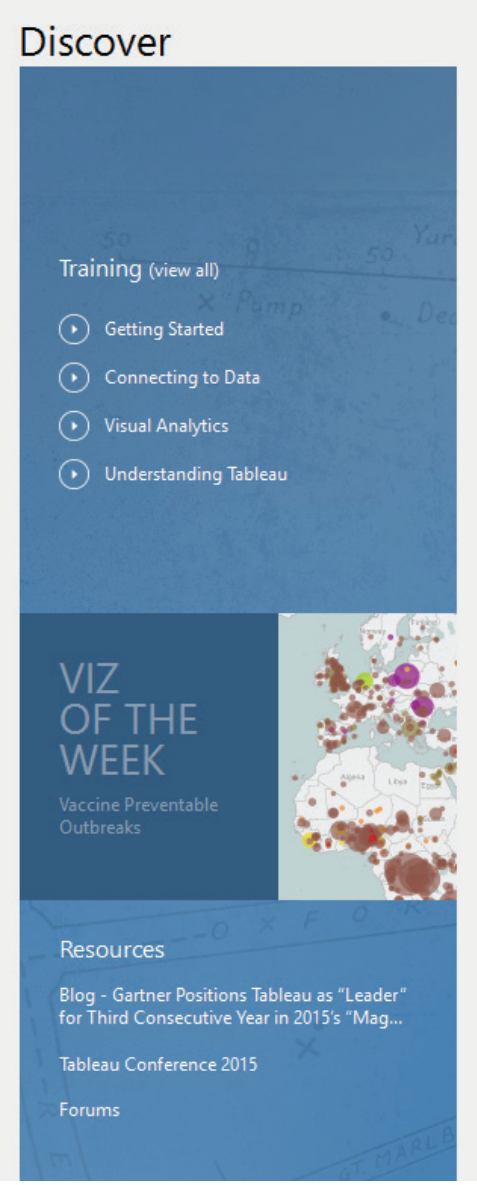
5 Sheet previews!

Another useful little feature added to Tableau 9, the preview functionality allows you to hover over sheet names, you will be able to hover over sheet names to view a thumbnail of the sheet alongside. This is extremely useful as not only does your navigation between sheets become easier, it also saves you a lot of time when creating a dashboard. This feature is available both in the sheet list when creating a dashboard, and also when hovering over the sheet and dashboard names along the bottom of the Tableau Desktop window.



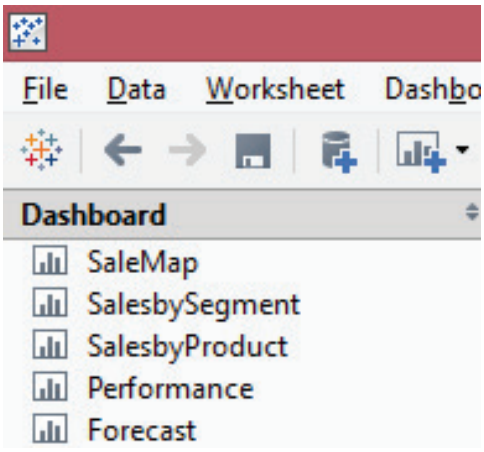
6 Tableau Discover

And then there is the 'Tableau Discover' tab that lets you tap into the Tableau resource database, including links to training for beginners, a feature on Tableau visualization of the Week, and so on. There are also links provided to other resources like the forums, Tableau blog posts, and Tableau Conferences.



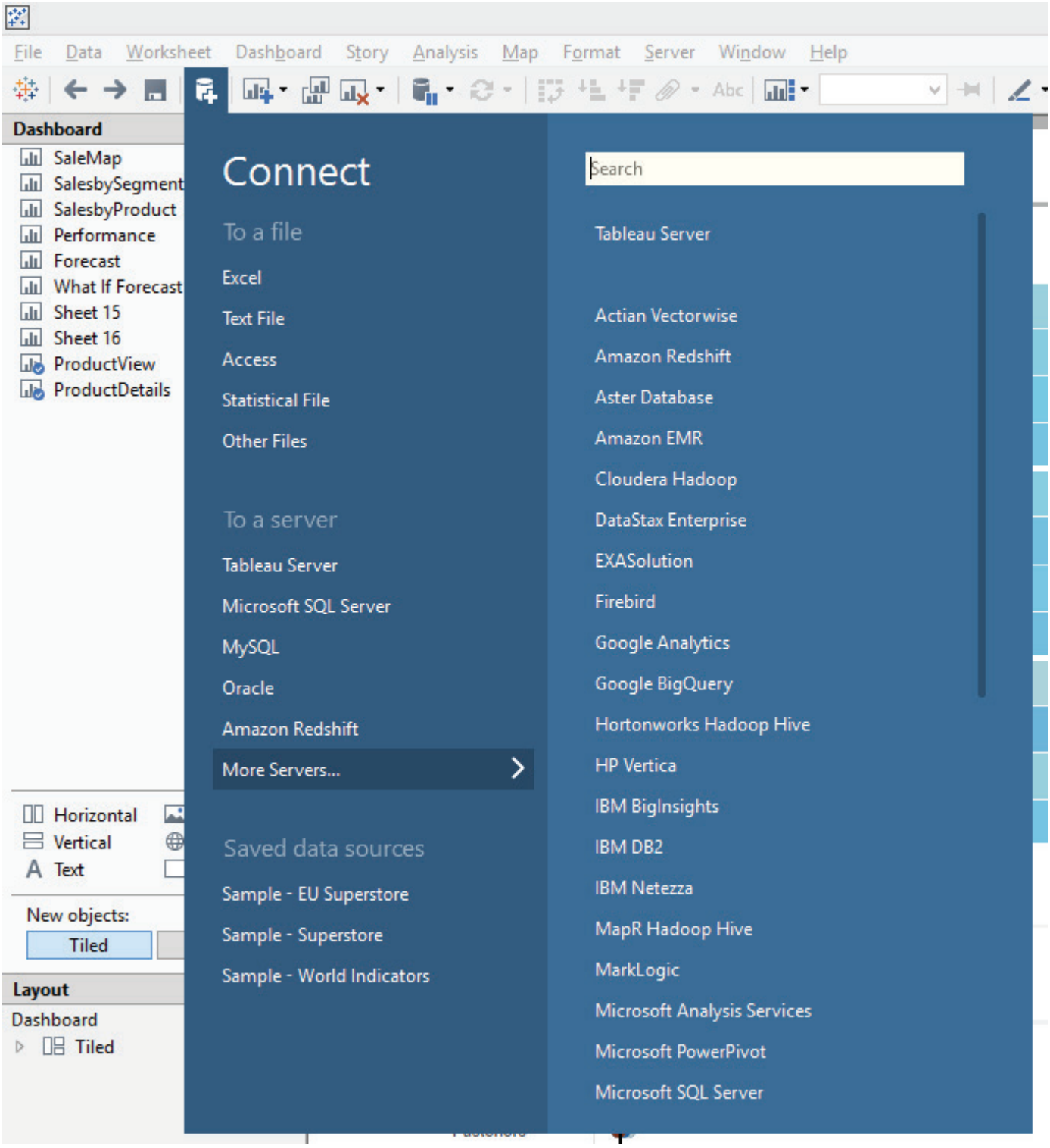
7 Quick-switch button

Another time saving feature to note is the handy button to the top left of the menu bar which allows the user to quickly flip between your visualization and the Tableau Desktop start page. How often have you used this cool feature in the past?



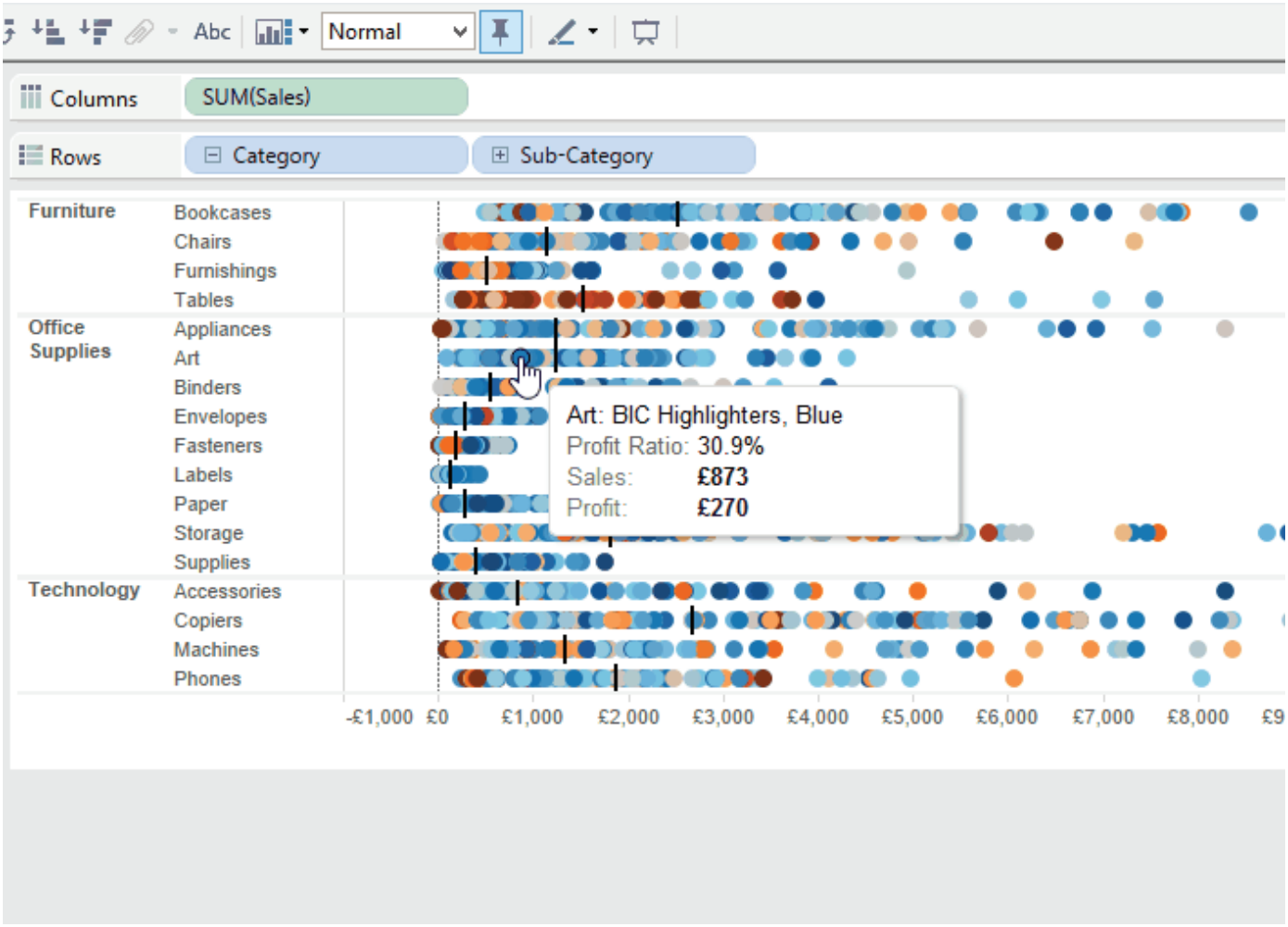
8 Quick-add new data sources

Another peppy feature to note is the 'add new data source' button in the menu bar which reveals a drop-down menu, allowing you to connect to new data sources without having to navigate to another page. Time-saving features like these are what makes version 9 the most user-friendly of all the versions of Tableau.



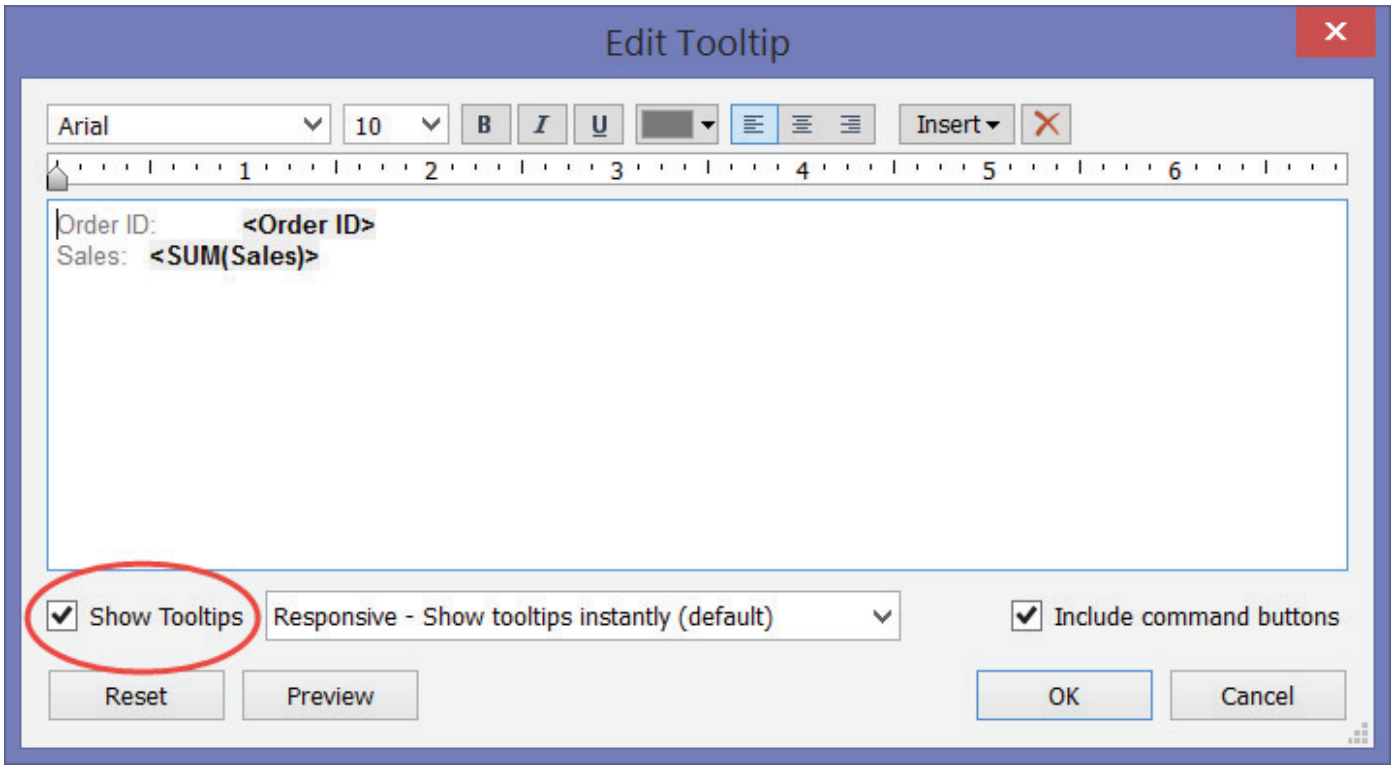
9 Persistent tooltips

With the latest version of Tableau, you would also notice that tooltips stay as long as you leave your mouse in place. They are also super-responsive with the data appearing with whichever mark you're hovering over in real-time. But if you find this unnecessary, you could also disable the option in the tooltips window.



10 Tooltip switch

Tooltips now also have an on/off toggle. Previously, when you did not want to display a tooltip on a particular sheet in a visualization, you might have ended up manually deleting all the text in the tooltip box and still found that the Ubertip doesn't disappear. So then you would have had to overlay the sheet with a blank-box or a text box. This feature adds to the other time-saving features that have been included with v9 of Tableau.



[All the listed features and the corresponding images here have been sourced from Tableau Consultant, Jonathan MacDonald's post on theinformationlab.co.uk.]

Tableau 9 has also undergone some bug fixes and upgradation to Tableau 9.2.3, the most recent release. If you are involved in data analytics jobs, or are already using Tableau, you might want to train yourself to become adept at implementing and maximizing your benefits from this software.

For students and professionals looking to improve their knowledge of Tableau 9, a professional certification course can add tremendous value. Check out our Tableau Desktop 9 Qualified Associate Certification Training Online for more details.

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