

Module 1: Data Preparation Using Tableau Prep

Demo Document II

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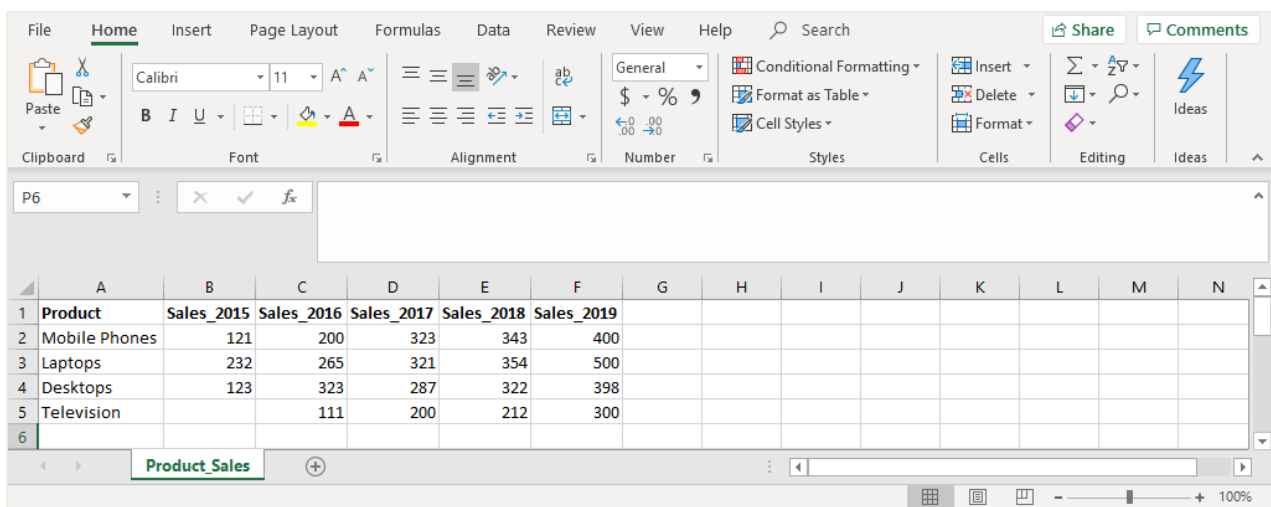
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Demo II

Pivoting data in Tableau Prep

Pivoting helps take wide, short tables and turn them into tall, thin tables thereby, making it easier to analyse in Tableau. We have an excel sheet with a table that has sales data in it. It has six columns - one for the product and five for every year between 2015 and 2019. Each of these columns have the sales data for that year.



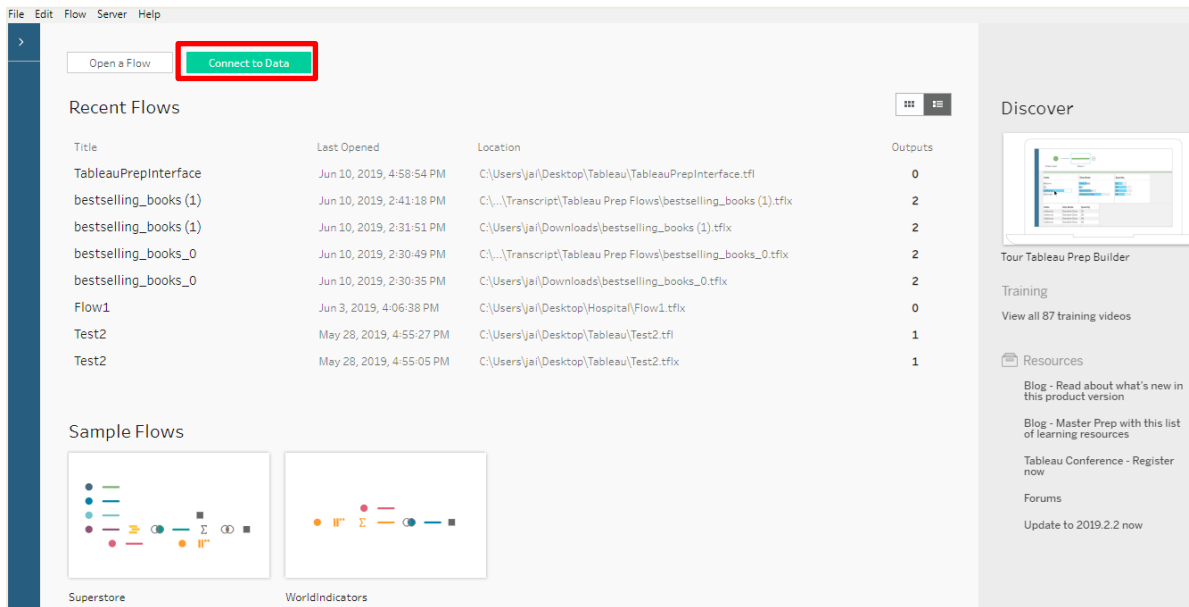
The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Product	Sales_2015	Sales_2016	Sales_2017	Sales_2018	Sales_2019								
2	Mobile Phones	121	200	323	343	400								
3	Laptops	232	265	321	354	500								
4	Desktops	123	323	287	322	398								
5	Television		111	200	212	300								
6														

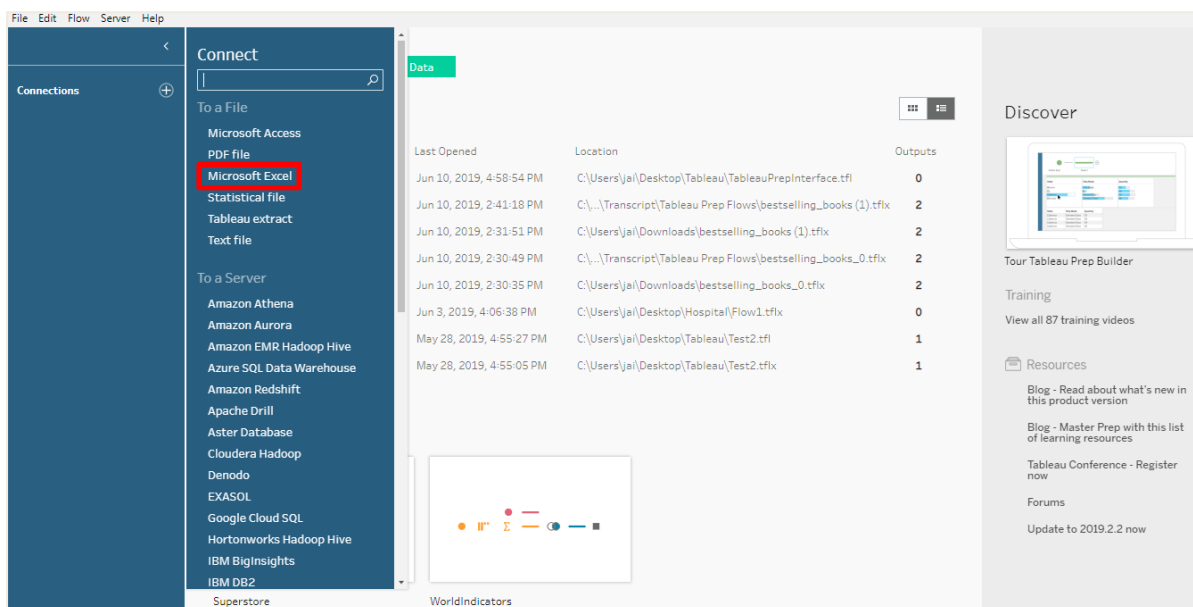
Reshape this data so that it is easier to analyse. We can achieve this by Pivoting data in Tableau.

Demo II – Solution

Step 1: Connect to the dataset.

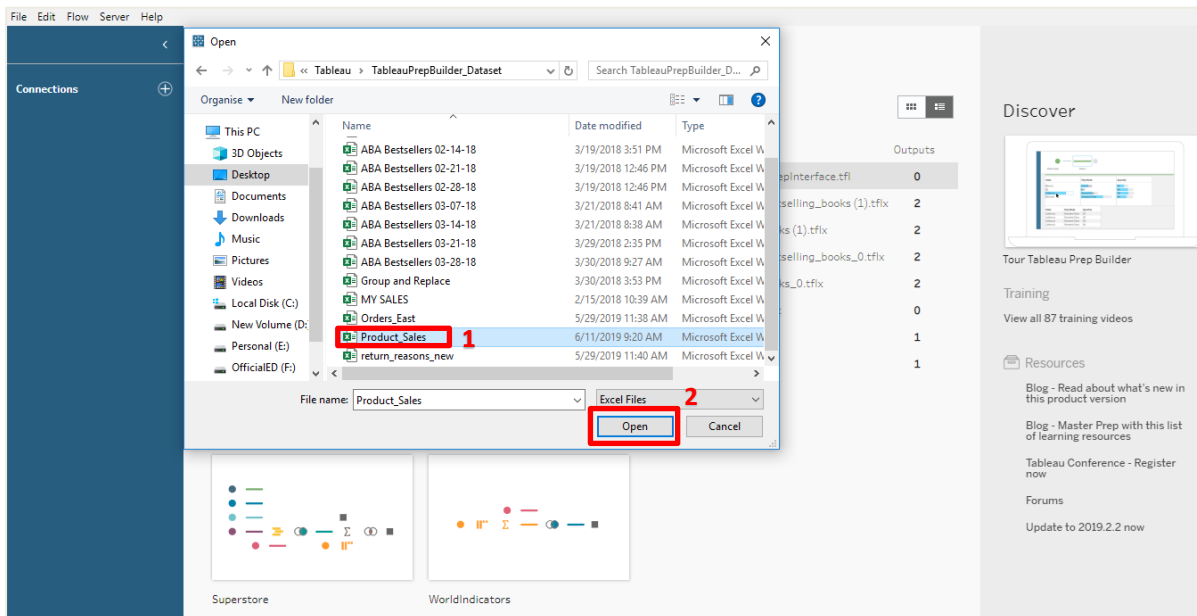


Step 2: Select Microsoft Excel.



Step 3: 1 → Select “Product_Sales” data set

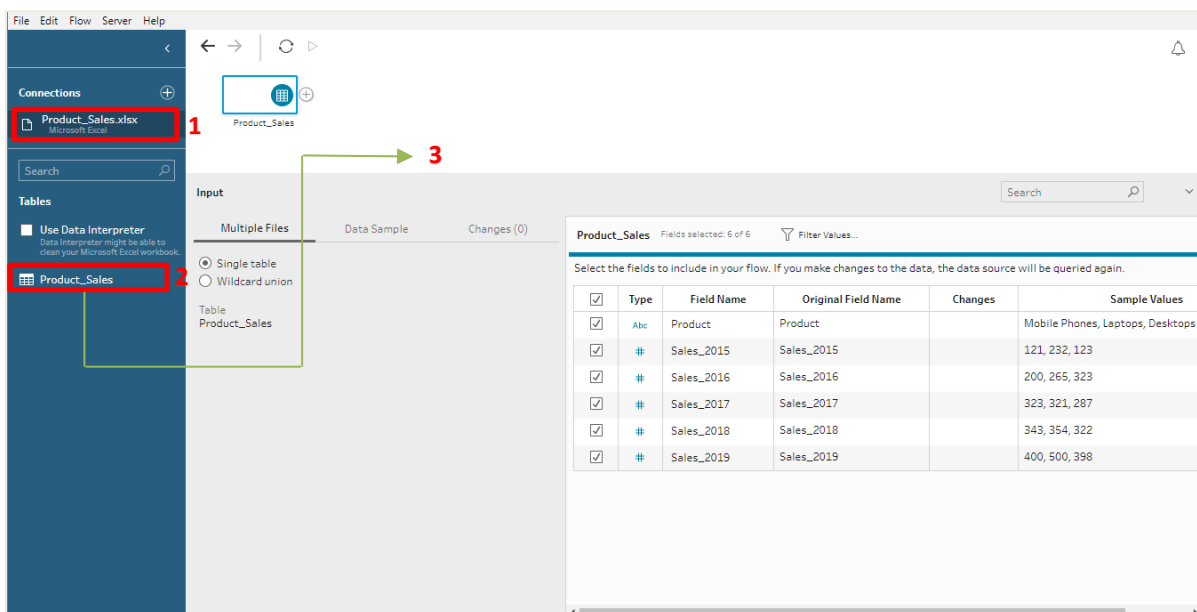
2 → Open the selected excel sheet



Step 4: 1 → Connection established with file: “Product_Sales”

2 → List of tables/sheet tabs in the dataset/file

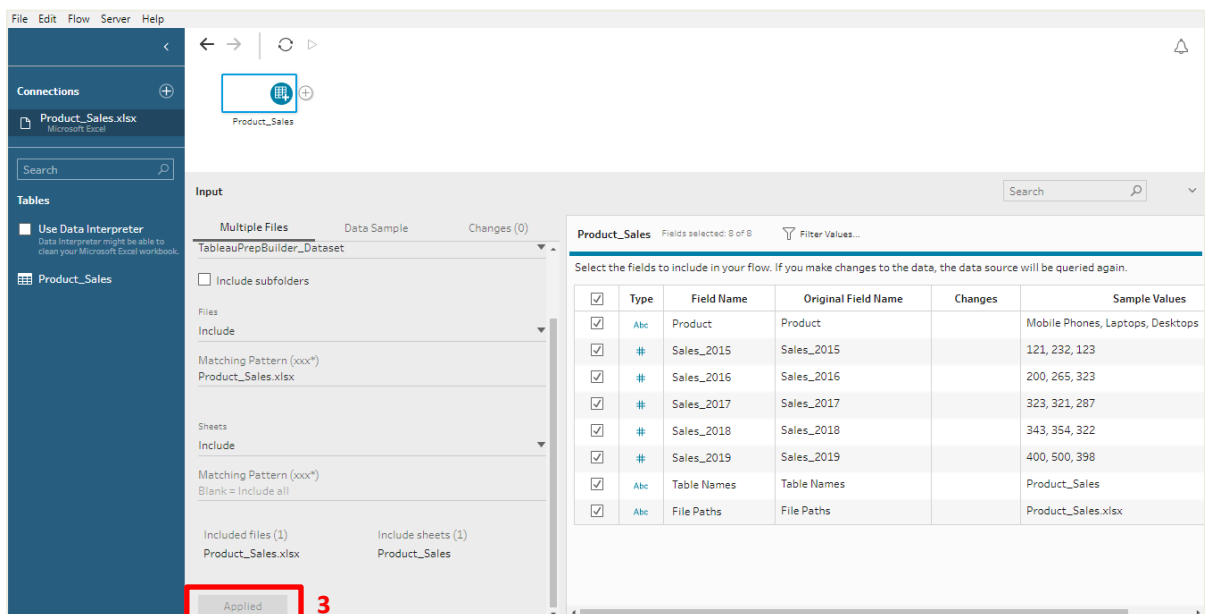
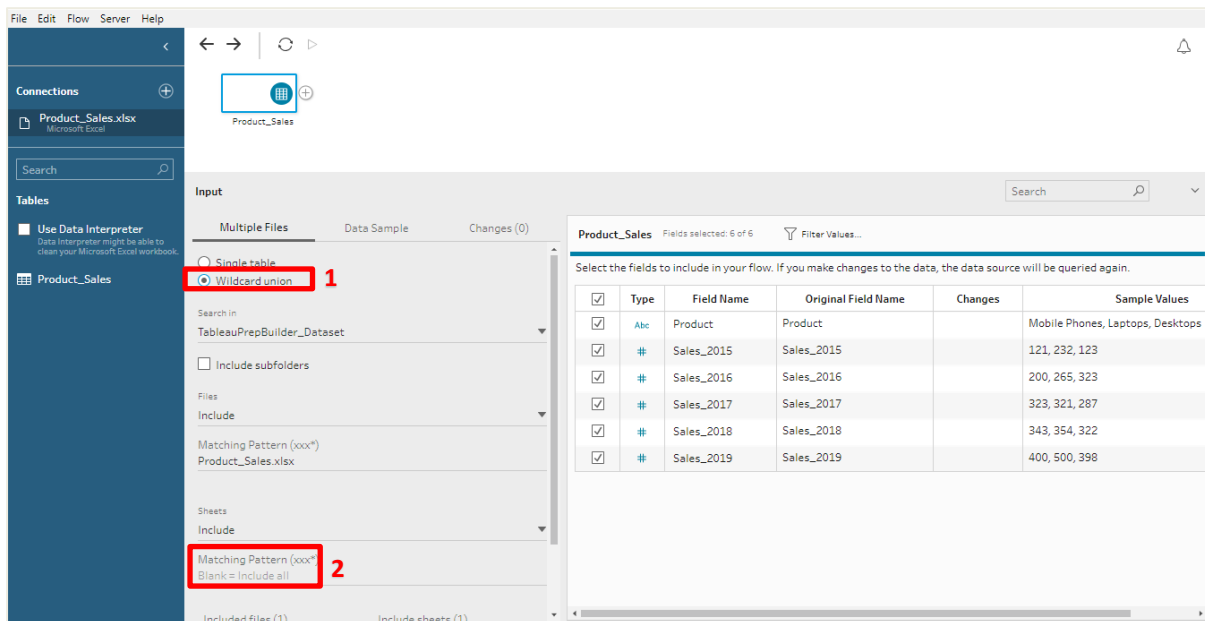
3 → Drag and drop “Product_Sales” table here



Step 5: 1 → Select “Wildcard union”

2 → Leave Matching Pattern “Blank”

3 → Click on Apply



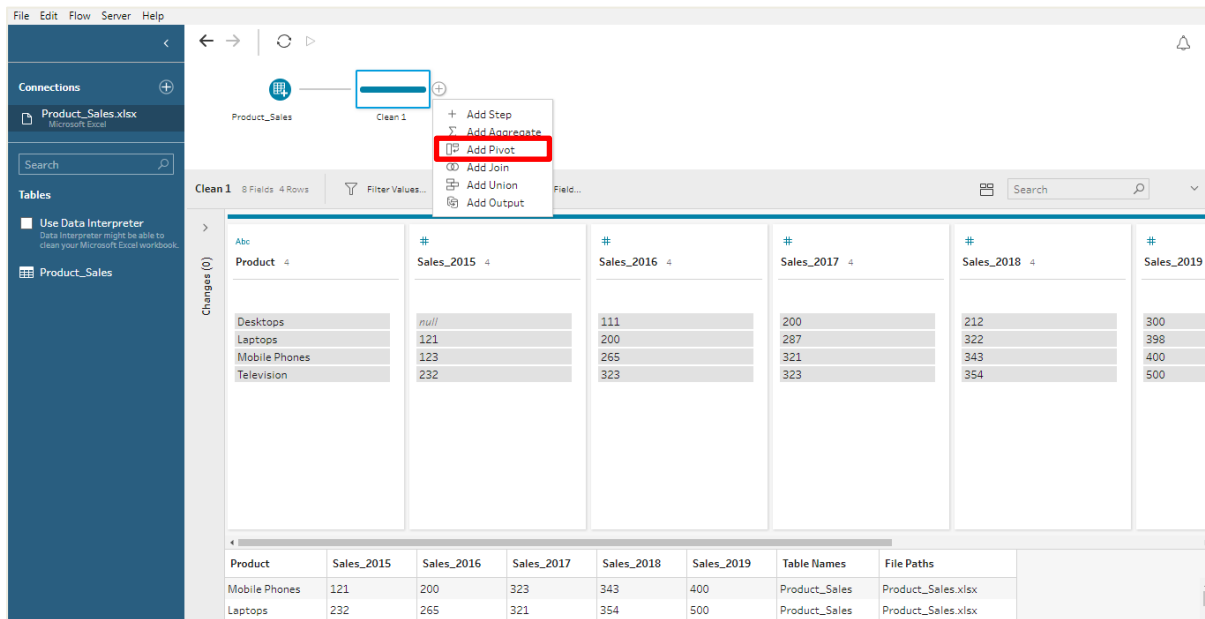
Step 6: Add a Cleaning Step

The screenshot shows the Tableau Prep Builder interface. On the left, the 'Connections' pane shows 'Product_Sales.xlsx' (Microsoft Excel) connected to 'Product_Sales'. The 'Tables' pane shows 'Product_Sales'. The main workspace shows the 'Input' section with 'TableauPrepBuilder_Dataset' and 'Product_Sales'. A red box highlights the '+ Add Step' button in the top right corner of the workspace. A dropdown menu is open, showing options: 'Add Step', 'Add Aggregate', 'Add Pivot', 'Add Join', 'Add Union', and 'Add Output'.

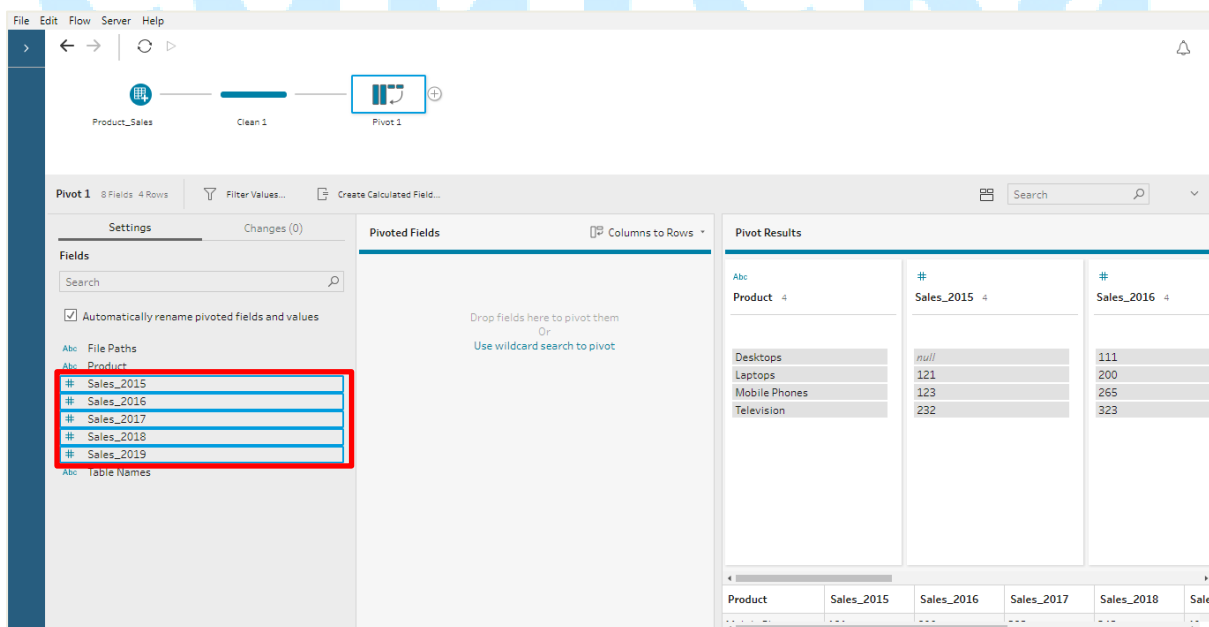
The screenshot shows the Tableau Prep Builder interface with the 'Clean 1' step added. The 'Connections' pane shows 'Product_Sales.xlsx' (Microsoft Excel) connected to 'Product_Sales'. The 'Tables' pane shows 'Product_Sales'. The main workspace shows the 'Clean 1' step with '8 Fields 4 Rows'. The 'Changes (0)' pane shows a list of changes: 'Product' (4), 'Sales_2015' (4), 'Sales_2016' (4), 'Sales_2017' (4), 'Sales_2018' (4), and 'Sales_2019' (4). The 'Table Names' pane shows a list of table names: 'Desktops', 'Laptops', 'Mobile Phones', and 'Television'. The 'File Paths' pane shows a list of file paths: 'Product_Sales.xlsx', 'Product_Sales.xlsx', and 'Product_Sales.xlsx'.

Product	Sales_2015	Sales_2016	Sales_2017	Sales_2018	Sales_2019	Table Names	File Paths
Mobile Phones	121	200	323	343	400	Product_Sales	Product_Sales.xlsx
Laptops	232	265	321	354	500	Product_Sales	Product_Sales.xlsx

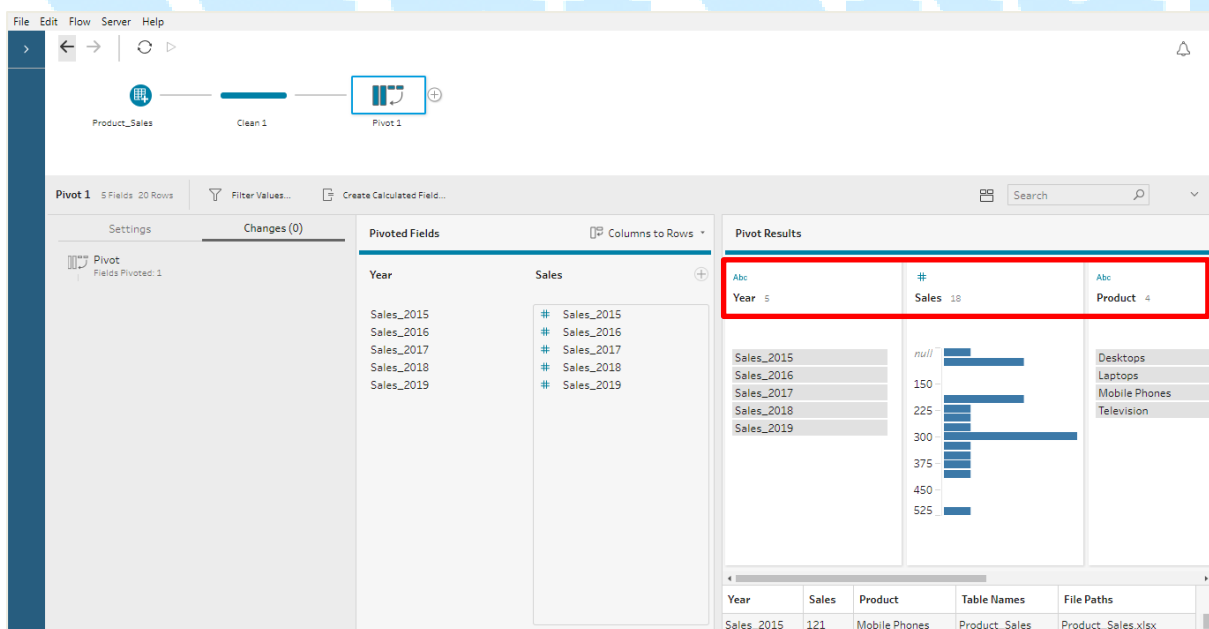
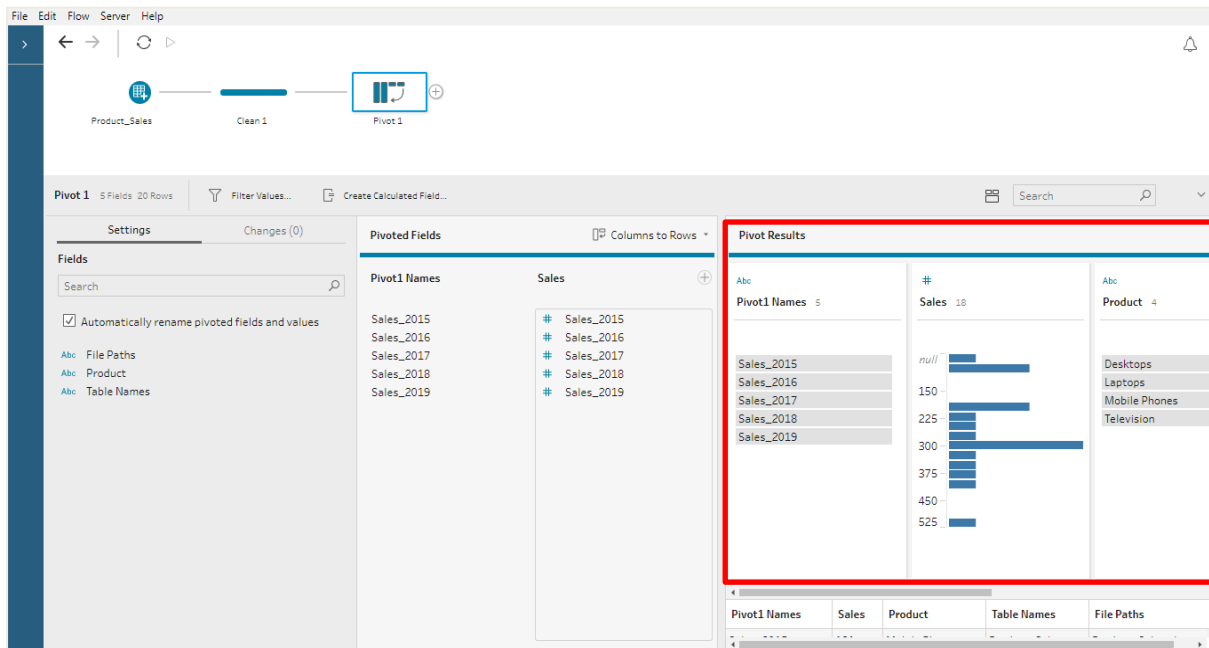
Step 7: Click on “+” button at Cleaning Step and select “Add Pivot”.



Step 8: Drag and drop the Sales fields for pivoting.



Step 9: Rename the columns as Year, Sales and Product.



Step 10: Add a Cleaning step. Now, our data is ready for analysis.

The screenshot shows the Tableau Prep interface. On the left, the 'Connections' pane lists 'Product_Sales.xlsx' from 'Microsoft Excel'. The main workspace shows a data flow: 'Product_Sales' (represented by a grid icon) flows into 'Clean 1' (a blue bar), which flows into 'Pivot 1' (a bar chart icon), which finally flows into 'Clean 2' (a blue bar with a plus icon). 'Clean 2' is highlighted with a red rectangular box. Below the flow, a toolbar includes 'Clean 2', '5 Fields', '20 Rows', 'Filter Values...', and 'Create Calculated Field...'. A search bar is also present. The main area displays a data table with the following columns and rows:

Changes (0)	Sales_Yearly	Year	Product	Table Names	File Paths
121		Sales_2015	Mobile Phones	Product_Sales	Product_Sales.xlsx
232		Sales_2015	Laptops	Product_Sales	Product_Sales.xlsx
123		Sales_2015	Desktops	Product_Sales	Product_Sales.xlsx
null		Sales_2015	Television	Product_Sales	Product_Sales.xlsx
200		Sales_2016	Mobile Phones	Product_Sales	Product_Sales.xlsx
265		Sales_2016	Laptops	Product_Sales	Product_Sales.xlsx
323		Sales_2016	Desktops	Product_Sales	Product_Sales.xlsx
111		Sales_2016	Television	Product_Sales	Product_Sales.xlsx
323		Sales_2017	Mobile Phones	Product_Sales	Product_Sales.xlsx
321		Sales_2017	Laptops	Product_Sales	Product_Sales.xlsx
287		Sales_2017	Desktops	Product_Sales	Product_Sales.xlsx
200		Sales_2017	Television	Product_Sales	Product_Sales.xlsx
343		Sales_2018	Mobile Phones	Product_Sales	Product_Sales.xlsx
354		Sales_2018	Laptops	Product_Sales	Product_Sales.xlsx
322		Sales_2018	Desktops	Product_Sales	Product_Sales.xlsx
212		Sales_2018	Television	Product_Sales	Product_Sales.xlsx

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