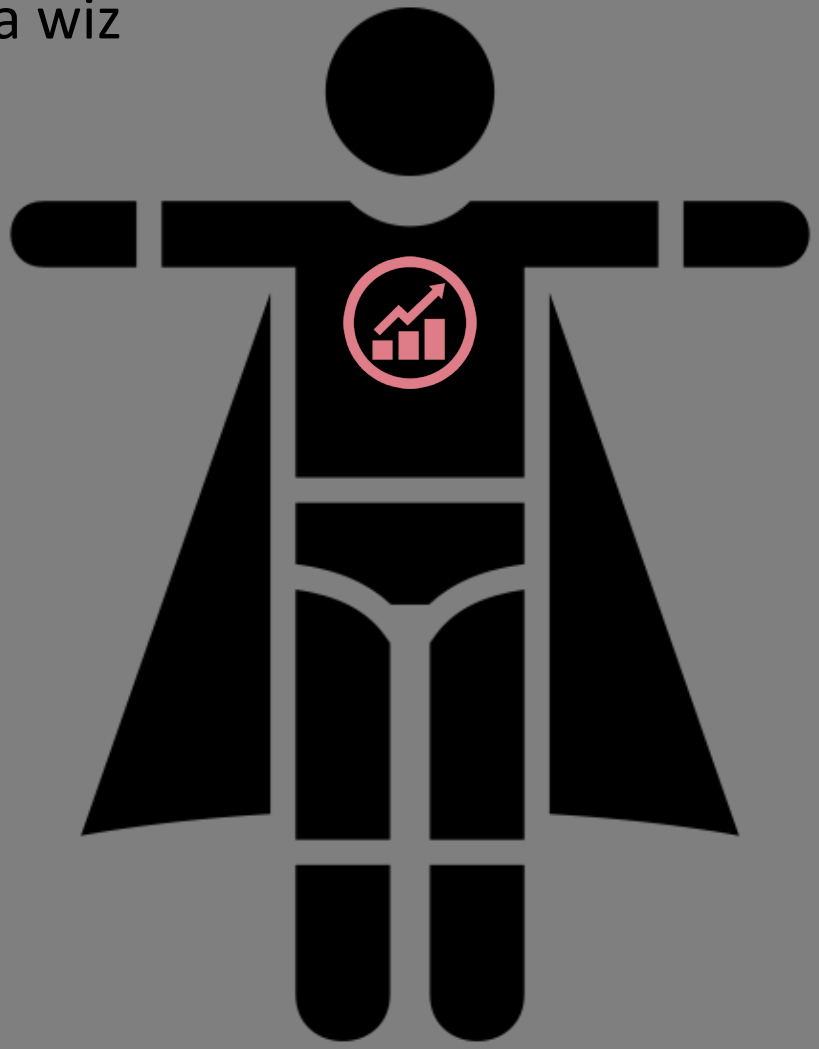
Tableau Do's and Don'ts

10 Common *traps and tricks* to help you viz like a wiz



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No | Summarized data

Avoid connecting to data in which aggregations are already present (i.e., pivot tables, totals)

Yes | Raw data format

Strip data of extraneous information and create aggregations, groups and hierarchies directly in Tableau

Whenever you add a measure to the view, Tableau automatically aggregates its values by default. This means that it collects individual row values from your data source into a single value (which becomes a single mark) adjusted to the level of detail in your view. Sum, average, and median are common aggregations.

To change the default aggregation:
Right-click (control-click on Mac) a measure in the Data pane and select **Default Properties** > **Aggregation**, and then select one of the aggregation options.

To disaggregate all measures in the view:
Clear the **Analysis >Aggregate Measures** option. If it is already selected, click **Aggregate Measures** once to deselect it.

No | Column-oriented data

Avoid connecting to crosstab tables or matrix formats

Yes | Row-oriented data

Pivot data from columns to rows and flatten hierarchical headers to a single row

No | Connect all tables

The **chasm trap** occurs when two “many-to-one” relationships converge, resulting in duplicate records

Yes | Slowly add tables

Add one table at a time…if the number of records suddenly multiplies ten-fold, create a separate connection instead

No | Excessive granularity

Do the details directly support what you are trying to convey? Too much detail at the top view impairs visual focus and abstract thinking

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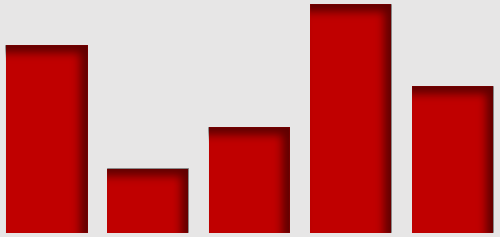
Yes | Facilitate insights

Break complexities into an easily consumable amount so that the viewer knows at first glance that action is needed



No | Pretty rectangles

If your viewers do not have a good frame of reference, they will be flying blind or misled

Yes | Intelligent axes

Set the axis to a specific, fixed range to facilitate visual comparison or use subtle reference lines

No | Redundancy

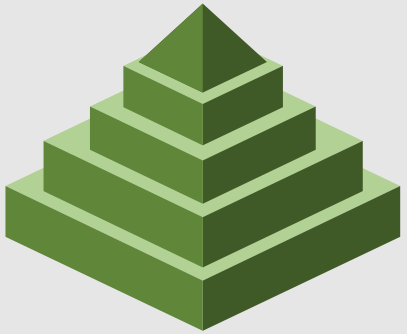
Don’t use two dimensions to convey the same information

Yes | Redundant encoding

Use multiple channels (i.e., color and size) to get the same information into your brain faster, easier, and more accurately

No | Random patterns

Random patterns that are difficult to interpret are frustrating and detrimental to what you're trying to communicate



Yes | Natural ordering

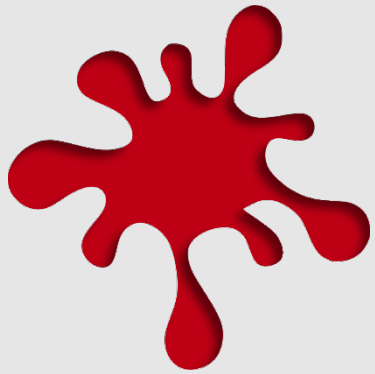
Order data intuitively, consistently and evenly

No | Pie charts

Humans are terrible at comparing lengths of curved lines and irregularly-shaped fields

Yes | Bar graphs

Never underestimate the value of a good bar graph



No | Overuse color

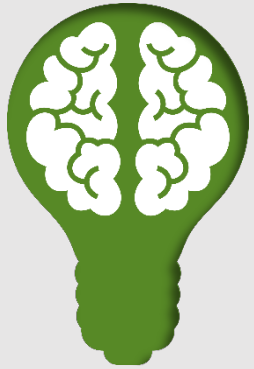
Unnecessary color does not add value and may even be confusing

Yes | Simplify color

Be able to justify every color…bright colors can be used sparingly to highlight importance

No | Fly solo

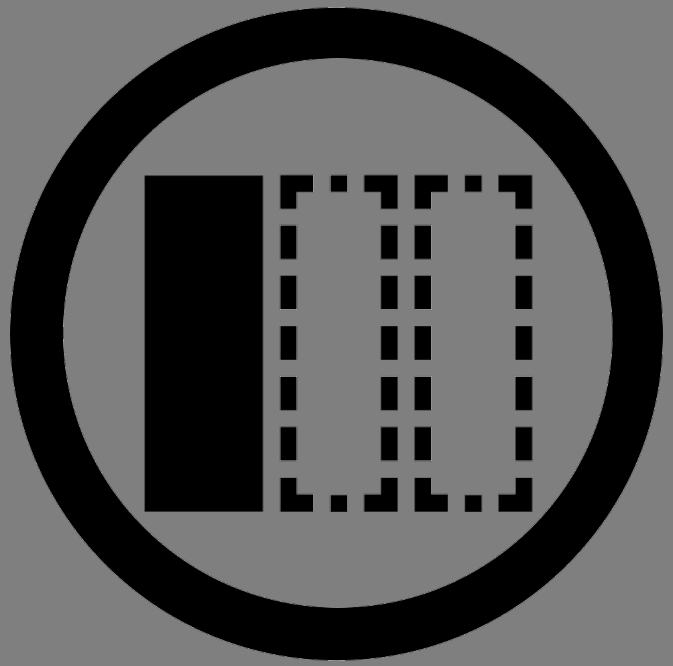
Don’t work in a vacuum



Yes | Steal like an artist

Embrace inspiration wherever you can (i.e., Tableau Public)

Reuse, Reinvent, and Redesign!



When you're working with dates or numeric bins, Tableau only shows the values that are represented in your data. If your data does not contain the complete range of values, the missing values will not be shown.

To show missing values in a range:
right-click (control-click on Mac) the date or bin headers and select **Show Missing Values**.

To show the empty rows:
selecting **Analysis** > **Table Layout** > **Show Empty Rows**.

To show the empty columns:
select **Analysis** > **Table Layout** > **Show Empty Columns**.

Note: You can replace missing values with a calculated field using the ZN() function.