



On-Demand Training: Intro to Table Calculations Transcript

Welcome to this Intro to Table Calculations video. You can download the Exercise workbook to follow along in your own copy of Tableau.

Example and Definition

A Table Calculation allows us to ask questions such as: which Category has the highest percent of our total sales?

We quickly see that Technology has the highest Percent of our Total Sales with almost 38%.

Let's start from the beginning and ask a new question, such as what is the Running Sum of Sales?

Let's right click in the data pane and create a calculated field. We'll title this as Running Sum (Sales). We can pull up the list of table calculation functions – we'll use `RUNNING_SUM()`

- We must specify that we'd like the Running Sum to be a sum of [Sales].
- We're now ready to see how the Sales have changed over time.
- Looks like we've had about \$12 and a half Million in Sales.

We were able to answer this question using a Table Calculation, which is a calculation that is performed on top of a returned result set locally within Tableau. Non-Table Calculations are evaluated at the data source.

These Table Calculations are indicated by this delta symbol on the pill.

Field Set

Table Calculations are performed only on the data in the view. If you are working with a crosstab, this data is exactly what you see. For any other view, the underlying data is presented differently but the values are the same as the crosstab.

Here the crosstab and the bars contain the same underlying data table, or Field Set. This is because the values in the underlying data table (hence Table Calculations) are the same regardless of the mark type used in the view.

- For this particular view, the Field Set consists of Category, Segment, and Quantity, all of which define the breakdown and length of the bars in the view.
- Altering the view by adding or removing fields changes the Field Set, which in turn alters the Table Calculation.

Quick Table Calculations

Table Calculations can either be written like any other calculation, in the calculation editor using the Table Calc functions. Or, there is also a set of pre-defined, commonly used computations called Quick Table Calculations.

- These include options like Running Total, Percent Difference, and Year over Year Growth.

Here we have a simple view of Profit, broken down by Quarter. Using a Quick Table Calculation, we may ask the question: what is the Running Total of our Profit over time?

- We can simply click the caret on the Profit pill to open the menu and select the Quick Table Calculation called Running Total.

- We now see that as of Q4 2014, our Running Total of Profit is about a million and a half dollars

Rank Example

After exploring our Sales, we may have an additional question such as: how do the Month/Year combinations compare in Profit? Or, more specifically, how does March 2014 compare in the Rank of Profit to the other months?

We are not limited to Quick Table Calcs when exploring this question. As we saw earlier, we can easily create a Table Calc from the calculation editor.

Let's right click in the data pane to create a calculated field.

- We'll name the calculation "Rank of Profit"
- And then specify that we'd like the RANK
- Of the SUM of [Profit]

For certain Table Calcs, we can further customize the resulting value by adding the more specifications. In this case, adding the string 'desc' will specify a descending RANK as opposed to the default ascending RANK.

We're ready to label the Profit bars with our Rank of Profit. We see that March of 2014 has the 14th Rank in Profit with just over \$37,000.

For more on customizing your Table Calc, please watch the Modifying Table Calculations video.

Conclusion

Thank you for watching this Intro to Table Calculations training video. We invite you to continue with the On-Demand Training videos to learn more about using Tableau.

