



Free Training Transcript:
Clustering

Welcome to this video on Clustering. You can download the Exercise workbook to follow along in your own copy of Tableau.

k-means Cluster Analysis

Cluster analysis is a statistical analysis technique used to identify which items are more related to each other than the other items based on some characteristics. Tableau's clustering feature uses the k-means clustering method.

Using Clustering in Tableau

Performing cluster analysis is a simple drag and drop experience. As long as the view supports clustering, simply click on the Analytics pane, drag "Cluster" to the box, and tada! Clusters are automatically put on color in the view.

Working with Clusters

We can control: the number of clusters, and what variables are used to compute the cluster. Tableau automatically uses the fields it can from the view to make the initial clusters. Once the clusters are calculated, they are independent of the measures in the view and to change what fields are being considered by the clustering algorithm, simply drag a field into or out of the variables box. The variable box can be brought up after the initial creation of the clusters by right clicking and selecting Edit Clusters from the pill itself.

To see information about the cluster, click select "Describe clusters". This brings up a summary of results. For more information on interpreting the information in Describe Clusters, click this link to bring up the online help.

The cluster is created as a new pill on the color shelf, but that pill can be dragged into the data pane to be saved as a group.

Conditions for Clustering

What views support clustering? Well, the data can't come from a cube. But there are a few other requirements: The view must have at least one dimension or, like we have here, aggregation has been turned off. Some fields cannot be used as input for clustering, including: dates, bins, sets, and table calculations.

Conclusion

Thank you for watching this Clustering training video. We invite you to continue with the Free Training videos to learn more about using Tableau.