



Free Training: Using a Parameter to Change Fields Transcript

Welcome to this How to video on using a parameter to change the field you're using in a view.

You can download the Exercise workbook to follow along in your own copy of Tableau.

Parameters can be thought of as a variable whose value can be controlled by the end user. This can be something like choosing a cutoff value in an analysis, or even which field is displayed in a viz.

Overview

Let's say we want to build a single chart that will be used by two different groups of people – one who are interested in sales, and the other who are interested in profit. We only want to make one view but let the person using it chose what value they want to see.

The overall process is easy:

1. Create a parameter to let us select which measure we want to use.
2. Create a calculated field to tie that parameter to the data source.
3. Use the calculated field in the view.
4. Show the parameter control.

Creating the Parameter

First, we'll create the parameter itself.

- Right click in the data pane and select "Create Parameter"
- We'll name this "Sales or Profit?"
- For Data Type, select String. This will allow us to enter text values
- For Allowable values, choose "list" so we can type in what we want.
- Now we'll enter the fields we want to use.
 - Profit, and hit enter. Note that the Display As automatically updates to the same value.
 - We need to remember exactly what we put for the value – we'll need it later
 - Then in the next row, we'll type Sales
- Click OK

Creating the Calculated Field

Now we have that parameter, but it doesn't do us any good because it's not impacting anything yet. We need to create a calculated field using the parameter's input.

- Right click in the data pane and select "Create Calculated Field"
- We'll name this "Sales or Profit"
 - Because we need to go through several options for the parameter's input and assign each to a specific field, we'll use a CASE function. We could also use IF

- First, we'll type CASE, then drag out the parameter
 - Type WHEN, then type the first value in quotes "Profit"
 - This has to match exactly what we put in the parameter value field, and remember, it is case sensitive
- Next we'll type THEN, and drag out the Profit field
- Repeat with the next value
- WHEN "Sales" THEN [Sales]
- And finish with END
- Essentially what this does is tell Tableau "when the parameter says profit, give me the profit field. When the parameter says sales, give me the sales field"
- So now we have a field we can use in the view that responds to the parameter

Building the View

Let's add this to the viz

- We have Category on Rows
- We can drag Sales off the Columns shelf
- Let's bring our new field, [Sales or Profit] to the Columns shelf

We're now using a field that will either show Sales or Profit, but how do we change between those options?

- Right click on the "Sales or Profit?" parameter and select Show Parameter Control

The viewer can now change the parameter and the view will update.

Conclusion

Thank you for watching this video on changing fields with parameters. We invite you to continue with the On-Demand Training videos to learn more about using Tableau.

