



Free Training Transcript: String Calculations

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

String Parameters

Let's say that we are responsible for the sales for several brands of products. If we look at the Product Names, most contain the company who makes them. We want to highlight and focus on the ones that we are in charge of. To do that we can create a list of those companies and then create a calculation that finds product names containing those company. We have a parameter here, let's right click and edit, and we see that it's a string parameter that allows a list of values and those values are the companies that we're interested in. We'll add one, Xerox, and click OK.

Now, we need to create the calculation that checks if one of these names is in the Product Name. Right click in the data pane and select "Create Calculated Field". We'll call this "Company Products". We'll use the string function CONTAINS() to find out if the company name we have selected in the parameter is found within the name of the product. We'll type CONTAINS(and we're first asked for the string we want to search in, which is Product Name, so bring that out, and type a comma. Now we're asked for the string we want to search for, in this case the company name from the parameter, so we'll bring that out and close the parentheses: CONTAINS([Product Name], [Company]). The calculation is valid, so we'll click OK.

We've now created is a Boolean, or a true/false calculation that we can use in the view. Let's place our new calculation on the filter shelf and keep only True. Now we click through the parameter we see products from the companies that we're interested in.

Splitting Strings

A common need is to split a field into separate parts. In our data set, Order ID consists of four parts, the Distribution center code, the year of the order date, and two additional pieces to make it a unique identifier. Let's split these into separate fields. We'll right click on Order ID, select Transform > Split. And Tableau has created 4 new fields, one for each part of the Order ID. Let's rename Split 1 as Distribution Center. Let's bring this out, and then bring out Number of Records, so we can see the volumes going through these distribution centers. As a note, splitting strings can also be done when connecting to the data set originally.

Conclusion

Thank you for watching this String Calculations Video. We invite you to continue with the Free Training videos to learn more about using Tableau.

