



On-Demand Training: Cleaning Data by Bulk Re- aliasing Transcript

Welcome to this video on Cleaning Data by Bulk Re-aliasing. You can download the Exercises workbook to follow along in your own copy of Tableau.

In this video, we'll re-alias a primary data source by blending with a secondary data source that contains the aliasing information.

Setting up the Data Blend

Here, our primary data source, Global Superstore, only has country's full names. However, we want use their two letter ISO abbreviation. We have another data source, Country Codes, which has both the countries and their abbreviations.

- Let's blend with Country Codes.
 - This orange link means our data sources are linked on the field Country
 - So we can we'll bring Country Code into the view

We want to use the two letter abbreviation in all of our vizs to save space and make it look tidier. To do this, we can change the aliases of the Country field's members. Aliases are alternate names for specific values within a dimension or for a field itself.

- We have two options for how we want to do our aliasing. Right click on the Country Code pill on the Rows shelf, and we see
 - Create Primary Group
 - And Edit Primary Aliases

Create Primary Group

- Creating primary group – let's click that – this create a group for each row of the bar chart
 - The "group" AF will contain Afghanistan, AL contains Albania, and so on.
 - Click OK, and if we go back to the primary data source, we see a new grouped field has been added.
 - We can now use this in place of our original Country field, headers show the group's name, giving us the abbreviations
 - We haven't modified our data, and we don't even need the data blend any more

Edit Primary Aliases

- The other option, if we right click on country code pill again, is to edit primary aliases.
 - This will actually re-alias those members. We're not creating groups, we're modifying the original field within Tableau.
 - This is essentially an automated way of clicking on each country's header, clicking re-alias, and entering the abbreviation.
 - Because of this, we'll end up breaking the data blend relationship, since it was based on country's full

names, but we don't even need it anymore!

- If we still want the blend for additional information from the secondary data source, we can go to
 - Data > Edit Relationship > click custom, and edit country
- Now Country from the primary data source matches Country Code from the secondary
- this fixes the data blend link, and we're good to go

It's easy to see how this feature of blending to re-alias can save a lot of time and effort, and it's very easy to do.

Conclusion

Thank you for watching this training video on Cleaning Data by Bulk Re-aliasing. We invite you to continue with the On-Demand Training videos to learn more about using Tableau.