



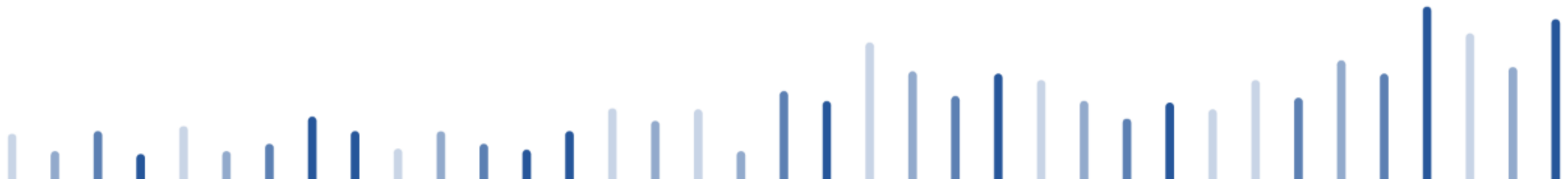
Leading the Way

A guided eLearning Journey

Beginner

Keeping Things Straight: Best practices around Hierarchies, Groups, and Dates in Tableau Desktop

June 23rd, 2020; *We will start five minutes after the hour*



About Frannie



Agenda:

- 1) Housekeeping
- 2) Groups
- 3) Hierarchies
- 4) Date/Time Fields
- 5) Q&A

Today's Session

- Is being recorded!
- Type your questions into Q&A box; be sure to direct them to the panelists
- I'll answer a couple of FAQs at the end
- Complete this survey to be entered into a drawing to win Tableau swag:
<https://tinyurl.com/ycgffr56>

Today's Session

eLearning Modules/Topics

- Desktop I: Fundamentals
 - Creating Groups in your Data
 - Creating Hierarchies in Your Data
 - Working with Date Fields

For next week

- Aggregations and Calculations
- June 29th, 2020

eLearning Modules/Topics

- Desktop I: Fundamentals (*continued*)
 - Using Calculations: Customize Your Data
 - Using Calculations: Working with Strings, Dates, and Type Conversion Functions
 - Using Calculations: Working with Aggregations
 - Using Quick Table Calculations to Analyze Data



Keeping Things Straight

Best practices around Groups, Hierarchies, and Dates in Tableau Desktop

Grouping Tips – Creating groups from dimensions pane

- Use Find to search for text. Choose between Starts With, Contains, and Exact Match
- You can specify a Range to search within
- Selecting ‘include Other’ creates a group containing values that have not yet been grouped
- Toggle ‘include Other’ on and off to help with visibility into which groups you’ve already created
- Apply button saves changes and keeps the window open
- Cancel button doesn’t save any changes and closes the window
- OK saves changes and closes the window
- Reset gets rid of all groupings and reverts the copied field back to the state of the original field

Grouping Tips – Creating groups visually

- If you create a group by making selections within a viz, there will be changes to the viz
- When creating groups by selecting labels, the dimension gets replaced by the new grouped field
- When creating groups by selecting marks, the original dimension stays where it is. Your new grouped field appears on color

Hierarchies

- If not using Tableau Desktop, end users of your viz can only interact with hierarchies when they're used on columns or rows
- If you don't want end users to interact with hierarchies, you can
 - Duplicate the fields you want to use, don't include them in hierarchies, and use those on the viz instead
 - Put the viz on a dashboard and then float a blank object over where the hierarchy + and – signs would appear
- Hierarchies are not the only way to drill down
 - Create multiple charts and use actions
 - Viz in tooltip
 - See underlying data
 - Sets, set actions, and calculated fields

Non-hierarchy Drill Down Options

Actions: https://help.tableau.com/current/pro/desktop/en-us/actions_dashboards.htm

Viz in Tooltip: https://help.tableau.com/current/pro/desktop/en-us/viz_in_tooltip.htm

Drill-down examples using Set Actions (Intermediate/Advanced - these use sets, set actions, and calculations): <https://www.tableau.com/about/blog/2018/12/8-analytic-concepts-express-tableau-set-actions-99108>

Date/Time Fields

- Set fiscal year start month: https://help.tableau.com/current/pro/desktop/en-us/dates_fiscal.htm
- Discrete vs continuous
 - Use discrete dates when you want to delineate between date/time values with a line, when you want to sort date/times in a non-chronological order
 - Use continuous when you want an unbroken axis and when you want to keep chronological (or reverse chronological order)
- Custom dates are useful when you don't want users to interact with date/time hierarchies. Also useful when you want to use a particular date part in a calculation
- Get familiar with the options available when you drag a date/time field to the Filters shelf
- Practice right-click dragging date/time fields and familiarize yourself with those options as well

Resources on Time Analysis

ISO - 8601 Week-Based Calendar: https://help.tableau.com/current/pro/desktop/en-us/dates_calendar.htm

Fiscal Dates: https://help.tableau.com/current/pro/desktop/en-us/dates_fiscal.htm

Visualizing Time: Beyond the Line Chart (Whitepaper): <https://www.tableau.com/learn/whitepapers/visualizing-time-beyond-line-chart?signin=1e3b700a496ebbf83154485b70203488>

New Ways to Visualize Time (Video): <https://youtu.be/iDII2j1Izts>

Greatest of All Time Analytics (Advanced - Tableau Conference 2018 Session Recording): <https://youtu.be/9WNzcc7-VLY>

Introduction to Time Analysis (Advanced - Guided eLearning Webinar Recording): <https://www.tableau.com/learn/webinars/introduction-time-analysis#video>

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