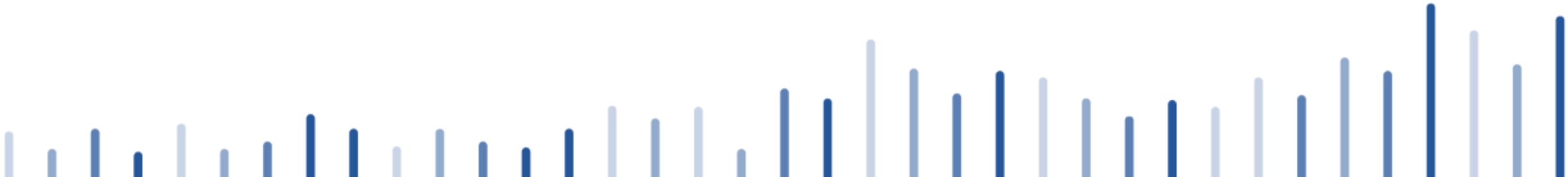
Leading the Way

A guided eLearning Journey

How sets and advanced calculations work in Tableau
6/10/2020



Welcome

Kirk Munroe
Customer Success Manager

Evan Payne
Customer Success Manager

Today’s Agenda

Introductions and Agenda	2 min
Review eLearning topics from week	2 min
New content to reinforce eLearning lesson -	45 min
Q&A	10 min
Next steps in your eLearning study	1 min

Week	Beginner (Tuesdays)	Intermediate (Wednesday)	Advanced (Thursdays)
June 1 ✓	You + Tableau = Success: An introduction to Tableau Desktop | Tuesday, June 2 - 10:00am PT Max DeLawyer	Visualize This: How visualization best practices ensure success | Wednesday, June 3 - 10:00am PT Michael Warling/Sarah Nell-Rodriquez	Introduction to Advanced eLearning: Turning the Tables with Advanced Calculations and Set Actions | Thursday, June 4 - 10:00am PT Eli Blankers / Rob Chapekis / Zach Wright
June 8	Show Me the Details: How Show Me, Dimensions, Measure, and Dashboards work | Tuesday, June 9 - 10:00am PT Grace Runk	Set Up for Success: How sets and advanced calculations work in Tableau | Wednesday, June 10 - 10:00am PT Kirk Munroe/Evan Payne	Leveling Up with Advanced LOD calculations | Thursday, June 11 - 10:00am PT Scott Smith / Larry Clark for Relationships
June 15	Sorting Things Out: A guide to organizing data via Filters, Parameters, and Sort in Tableau | Tuesday, June 16 - 10:00am PT Kevin Donahue	What is an LOD, anyway? LODs and Table Calculations in Tableau - Wednesday, June 17 - 10:00am PT Paul Lisborg/Alison Dallenbach	Introduction to Time Analysis and Survey data | Thursday, June 18 - 10:00am PT Mark Bradbourne
June 22	Keeping Things Straight: Best practices around Hierarchies, Groups, and Dates in Tableau | Tuesday, June 23 - 10:00am PT Frannie Makabenta	The Art of Data Massage: Using Joins, Blends, Pivots, and Object Modeling | Wednesday, June 24 - 10:00am PT Kelly Jones/Greg Walklet	Map This! | Thursday, June 25 - 10:00am PT Angel Certeza / Will Watkins
June 29 (Mon-Wed)	Aggregate This: How calculations and aggregation work in Tableau Desktop | Monday, June 29 - 10:00am PT Andrew Barker	Data Delivery: How to leverage filtering and best practices to tell a story with your data | Tuesday, June 30 - 10:00am PT Francis Dejonckheere/Lindsey Carlsen	Dashboard Makeover | Wednesday, July 1 - 10:00am PT Andrew Barker / Erik Teutsch (metrics demo)

eLearning review

Modules/Topics completed this week

- Advanced Calculations: Aggregating Dimensions
- Controlling Table Calculations
- Using sets to highlight data

Set Up for Success

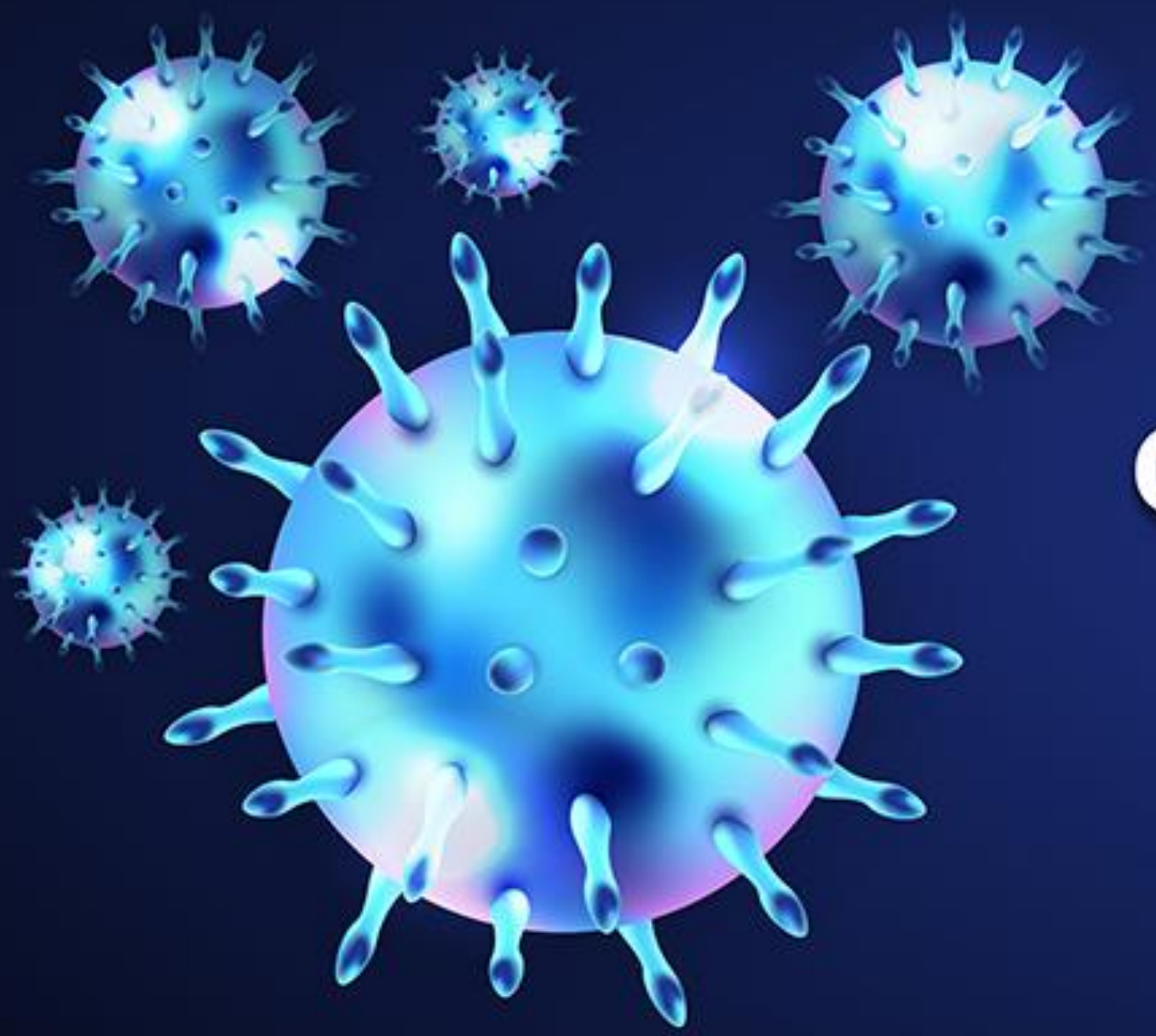
How sets and advanced calculations work in Tableau

Kirk Munroe
Customer Success | Tableau
@kirkmunroe

THANK YOU!

The Best Way to Learn Tableau...

... is pick an interesting (to you) data set and think about the questions you want to answer!



CORONAVIRUS COVID-19

Please VIZ responsibly!

Questions for Today are:

Which countries have the most cases?

Does it look different when adjusting for population?

Is the LATAM growth in cases really that much steeper?

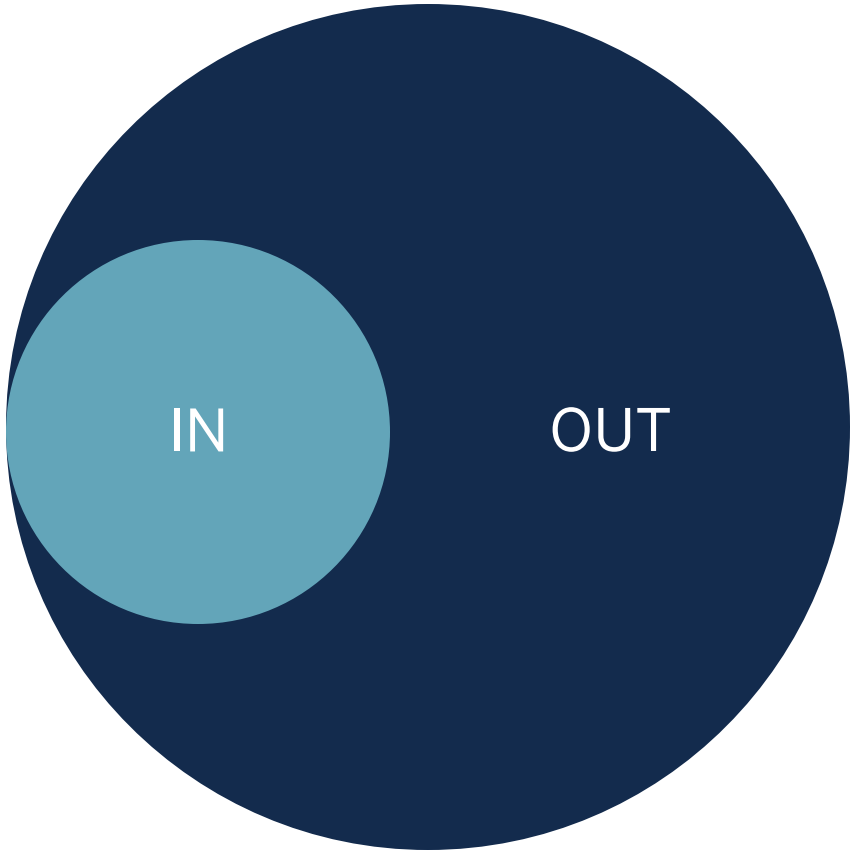
Which states are flattening the curve?

... and more!

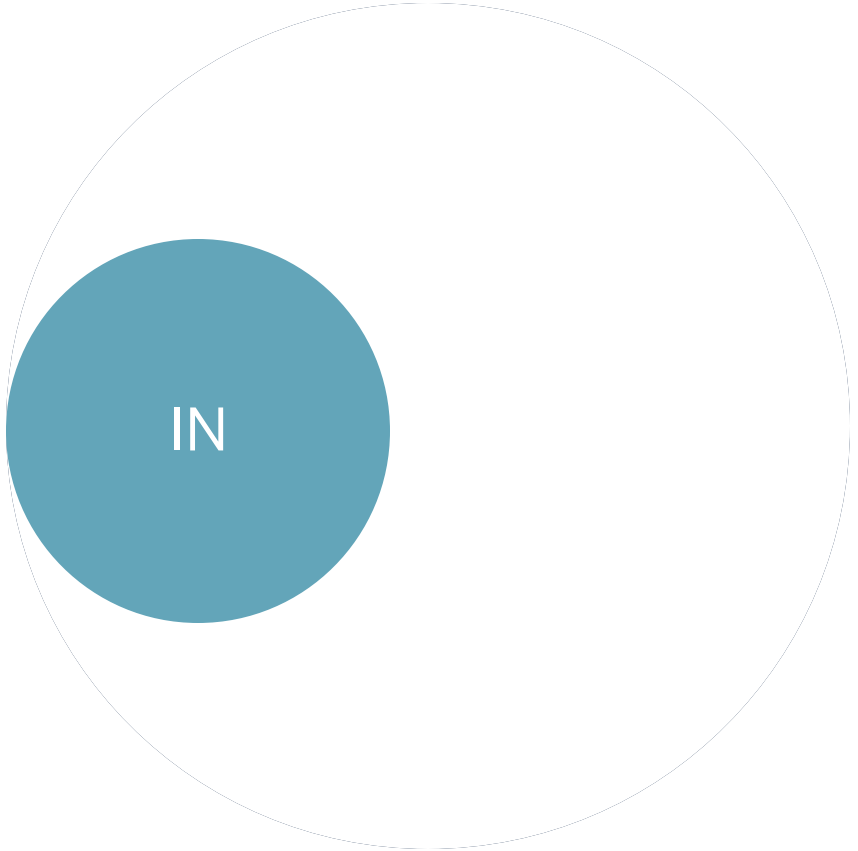
A Quick Review of Tableau Calculations

- **Number**
- **Aggregate**
- String
- **Logical**
- Date
- Spatial
- User
- **Table**
- Level of Detail

A Quick Review of Tableau SubSETS



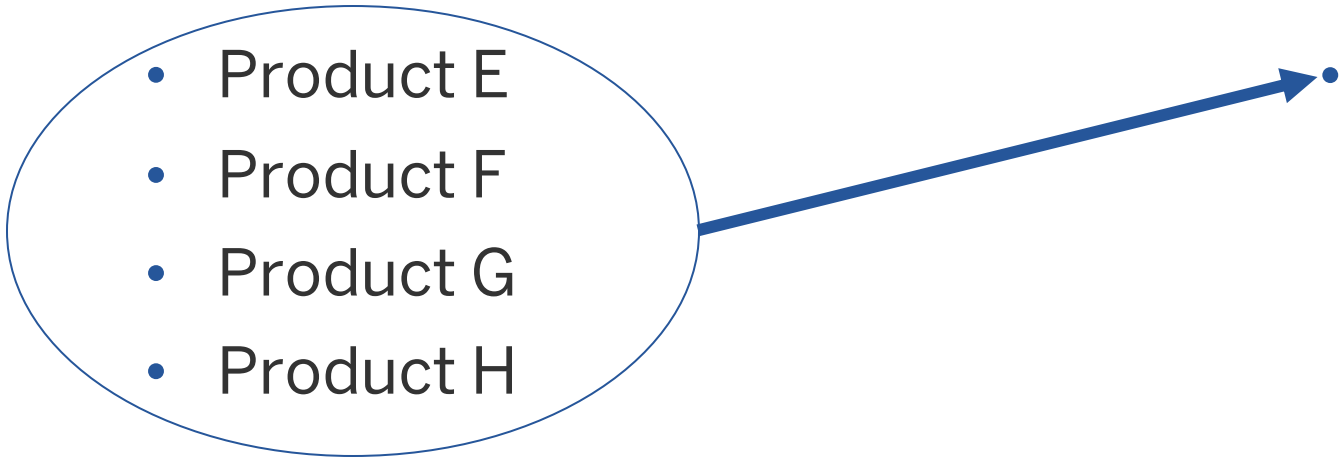
How are FILTERS different than sets?



What about GROUPS?

Product Dimension

- Product A
- Product B
- Product C
- Product D
- Product E
- Product F
- Product G
- Product H



Product Dimension (2)

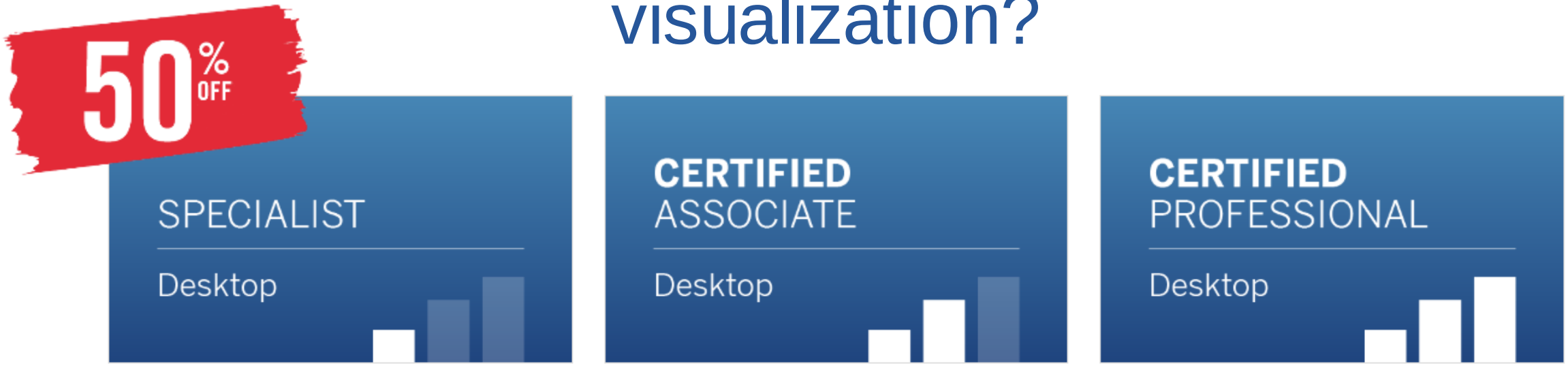
- Product A
- Product B
- Product C
- Product D
- Other Products

Want to get serious about SETS?

Attend Tableau Conference or watch these recordings from TC19

- Introduction to Sets
- Sets on the Beach
- When Sets Rock, When Parameters Roll

Want to show you are serious about visualization?



Desktop Specialist

Desktop Certified Associate

Desktop Certified Professional

Get Certified in Tableau Desktop!

tableau

For next week

- What is an LOD anyway? LODs and Table Calculations in Tableau Part 3
- June 17th, 10am PT

eLearning Modules/Topics

- Controlling Tableau Calculations
  - Specifying and controlling scope and direction
  - Showing profitability as a percent of total
- Using Level of Detail Expressions
  - Exploring LODs
  - Writing calcs fixed to a dimension
  - Calculating average product profit/category

Q&A

THANK YOU!

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