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Not everyone is a Tableau guru, at least not yet. To help Tableau rookies, we're starting from square one with the Tableau Essentials blog series. The series is intended to be an easy-to-read reference on the basics of using Tableau Software, particularly Tableau Desktop. Since there are so many cool features to cover in Tableau, the series will include several different posts. Today, we'll continue our exploration of the functions you can use when you create a calculated field. We covered Logical Functions and Number Functions in the two previous articles on this topic. Now, we'll cover Date Functions. To bring up the Calculated Field window, right-click anywhere in the Data window (i.e. sidebar) box and select Date. Then, select Create Calculated Field ... The Calculated Field window will appear like so: If you right-clicked on a particular dimension or measure to create your calculation, then it will appear in the Calculated Field window in the formula text area. To filter the functions to show only the Date Functions, use the drop-down and select Date. Now that we've got our functions selected, let's first define the potential values for date\_part, which is used in many of the Date Functions. Date\_part can have the following values: Second (0-60) Minute (0-59) Hour (0-23) Day (1-31) Weekday (1-7 or by name, i.e. "Sunday," etc.) Week (1-52) DayofYear (1-365) Month (1-12 or by name, i.e. "January," etc.) Quarter (1-4) Year (four-digit representation) Now that you know the different values, let's examine the Date Functions: DATEADD Function DATEADD(date\_part, interval, date) The DATEADD function allows you to specify a portion of a date and increase it. The number that you use for the interval will change the date by increasing the date\_part. Example: DATEDIFF Function DATEDIFF (date\_part, date1, date2, start\_of\_week) This function allows you to return the difference between date1 and date2 expressed in units determined by date\_part. The start\_of\_week parameter is optional, and if it is not defined, then the start of the week is determined by the associated data source. Example: DATENAME Function DATENAME(date\_part, date, [start\_of\_week]) You can use this function to return the date\_part parameter of the date as a string. Again, the start\_of\_week parameter is optional. Example: DATEPARSE Function DATEPARSE(format, string) This function essentially works in the reverse of DATENAME by converting a string into a date/time with your specified format. If the string does not match the date/time format, then it will return a value of Null. Example: This function is only available for Microsoft Excel, MySQL, Oracle, PostgreSQL, Tableau data extract and text file data sources. More on that here: DATEPART DATEPART(date\_part, date, start\_of\_week) The DATEPART function allows you to return a specified date\_part as an integer. Again, the start\_of\_week parameter is optional. Example: When the date\_part is set to weekday, the start\_of\_date parameter is not used because Tableau uses a fixed order to apply offsets. DATETRUNC DATETRUNC(date\_part, date, start\_of\_week) This function truncates the date to the accuracy of the date\_part that you specify in the function. In other words, it rounds towards that date\_part. Example: If the start\_of\_week is omitted, then it is determined by the data source. DAY DAY(date) This function returns the day of the specified date as an integer. Example: ISDATE ISDATE(string) This is a logical test that is also included in the list of Logical Functions. It tests a string to determine if it is a valid date (true/false). Example: MAX Function MAX(expression) or MAX(expr1,expr2) The MAX function exists in several categories of functions, including the Date Functions. The MAX function returns the maximum of a single expression across all records or the maximum of two expressions for each record. The two arguments must be the same type. This function will return a value of NULL if either argument is NULL. Example: MIN Function MIN(expression) or MIN(expr1,expr2) Like the MAX function above, the MIN function is commonly used as a Number Function but can also be used with dates. The MIN function returns the minimum of a single expression across all records or the minimum of two expressions for each record. MIN returns a value of NULL if either of the two arguments is NULL. The two arguments must be of the same type. Example: MONTH MONTH(date) This function returns the month of the specified date as an integer, just like the DAY function does for day. Example: NOW NOW() Returns the current date and time. Example: TODAY TODAY() Returns the current date. Example: YEAR YEAR(date) The YEAR function returns the year of the specified date as an integer. Example: Calculated Fields Calculated fields can add a whole new layer of insight to your Tableau dashboards. The possibilities are practically endless, but we'll be covering the fundamentals, especially functions, to help you build a foundational understanding of how and when to use them. Check back for more posts covering: Introduction Another great resource for functions is Dan Murray's best-selling guidebook, "Tableau Your Data!" It features a whole section devoted to the functions we'll be covering in this series and much, much more. More Tableau Essentials Want to learn more about Tableau? We have several posts outlining all of Tableau's fantastic features. Check out the full list on our Tableau Essentials blog channel. As always, let us know if you have any questions or comments about this post or Tableau in general. If you're looking for personalized training or help with something bigger, contact us directly! Calculations that compare IF or CASE statements, or contain multiple conditions, that are never True at the same time may return NULL. For example, the following example using Superstore data will always return NULL because there is no record in the underlying data in which both IF statements return a non-NULL value at the same time: IF [Region] = "Central" THEN [Sales] END - IF [Region] = "West" THEN [Sales] END Solution: Modify the calculations so all expressions return non-NULL values Wrap each IF THEN statement in an aggregation, such as SUM(): SUM( IF [Region] = "Central" THEN [Sales] END ) - SUM( IF [Region] = "West" THEN [Sales] END ) Note: this option will not work if any of the dimension(s) used in the conditional statement are included in the view. The above example will not work if [Region] is included in the view. Option 2 Wrap each aggregated IF THEN statement in a Level of Detail (LOD) expression. For example: { FIXED : SUM( IF [Region] = "Central" THEN [Sales] END ) } - { FIXED : SUM( IF [Region] = "West" THEN [Sales] END ) } Note: It may be necessary to add dimensions from the view to the above calculation (after FIXED). Option 3 Wrap each aggregated IF THEN statement in a table function. For example: WINDOW\_SUM( SUM( IF [Region] = "Central" THEN [Sales] END ) ) - WINDOW\_SUM( SUM( IF [Region] = "West" THEN [Sales] END ) ) For another example using table functions, see Calculating Difference Between Two Values of the Same Measure in a View. Not everyone is a Tableau guru, at least not yet. To help Tableau rookies, we're starting from square one with the Tableau Essentials blog series. The series is intended to be an easy-to-read reference on the basics of using Tableau Software, particularly Tableau Desktop. Since there are so many cool features to cover in Tableau, the series will include several different posts. The circle view is another powerful visualization for comparative analysis. The example below in Figure 1 has quite a bit of information packed into a single visualization. First, you can see that we are examining the sales figures for each product category. Take a look at the key on the top of the chart. The circles are colored by SubRegion and are sized by SUM(Profit). The larger the circle, the more profit that subregion generates for that product category. Figure 1: Circle view. With a quick scan, you can see that Chairs & Chairmats, Office Machines, and Telephones & Communication are all big sales generators. The smaller circles from Office Machines indicate that there is a much smaller amount of total profit than the other two more profitable categories. Ask yourself a question: Is profit a useful measure to include on this visualization? Not really. It is safe to assume that categories that have more sales on the y-axis are naturally going to produce more profit and create larger circles. The circle chart in Figure 1 confirms that suspicion. Not very helpful. The relationship between sales dollars and profit dollars isn't very clear in the subtle differences in circle size. What would happen if we substituted profit margin for profit? Take a look how our circle view changes from Figure 1: Figure 2: Changing profit for profit margin. We can now see that some product categories with high volumes in sales are actually less profitable. For instance, Copies & Fax is extremely profitable (large circles) while Envelopes & Paper is not (small circles). That's a more compelling "story" because it adds to the information available to the viewer. Additionally, almost everything in this visualization can be customized, including the circles themselves. If you want to change each plot so that a different color and a different shape represents your sales region, just drag the appropriate dimension onto the Shape button in the Marks card. Figure 3: Shape options. Above is a sample of the different types of shapes you can use in your circle view. The circle view is a powerful tool with the ability to include several different fields into a meaningful visualization. I hope that you consider using this chart type in your dashboards and reports. Other Chart Types Here is the complete list of chart types from the Show Me menu. Be sure to check back often as we continue to release new articles in each chart type in this sub-series. Introduction More Tableau Essentials Want to learn more about Tableau? We have several posts outlining all of Tableau's fantastic features. Check out the full list on our Tableau Essentials blog channel. As always, let us know if you have any questions or comments about this post or Tableau in general. If you're looking for personalized training or help with something bigger, contact us directly! Contact Us





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