Tableau Desktop Part 2 Transcript

Exploring Views

Top of Form

Okay we are going to go ahead and get started since it is the top of the hour so Stacy if you would like to go ahead and turn on the recording.

Good afternoon or good morning everyone and welcome to our second presentation here on using tableau desktop. We're really glad that you decided to join us again for this presentation.

We are recording the presentation today, and it will be available on TMS shortly.

Before we get started, we just have a few housekeeping items. We are taking attendance using TMS survey.

Please complete the survey in order to receive TMS credit and as I mentioned yesterday we do take this feedback very seriously. We value that feedback and modify the training based on the responses we get from folks.

So we appreciate it if you're not interested in the TMS credit if you take the survey so we can grow and learn and provide better training.

I did put a whiteboard up, if anyone has any questions from session 1. People had a few questions about data extracts and other things. If anyone has any questions you can put them on the whiteboard there. And you can also feel free to put them in the chat at any time.

Before we begin, please understand that tableau is simple to use, it also has things that we will not be covering at all during the sessions. Our goal is to get you familiar with using the products that you have been creating -- as soon as possible, and develop your skills as you get more familiar with the product.

So along the same lines with just giving you the introduction here, we will be providing step by step instructions to the exercises that we take during the course of the presentation. The PowerPoint is available for download and you can open it during the presentation and follow along step-by-step. Course materials are available [HERE](https://vaww.portal2.va.gov/sites/pai/TSCM/TableauDesktop/Tableau%20Intro%20Documents/Forms/AllItems.aspx?RootFolder=%2Fsites%2Fpai%2FTSCM%2FTableauDesktop%2FTableau%20Intro%20Documents%2FSession%202%20%2D%20Exploring%20Views&FolderCTID=0x0120008847B198A2916B4593A05648AE09C70B&View=%7bC62E615D-8984-4F61-9C6D-2769009F2DFB%7d).

And I just want to make sure that everyone knows we will not stop and wait for everyone to catch up, as we might in a live session. So again, we have provided the step by step instructions, we also after each new bit of material, we have a list of resources for you to learn more directly from tableau and other resources of the website. There is a lot of creative material available out there that you can Google and to provide for that.

And at the end of the presentation, again we will take a few minutes and for those of you that have questions, feel free to stick around after the presentation, and we can respond directly to any inquiries that you might have.

The course assistants today are Stacy Armstrong and Zach Foutz and Kristin Speedling they are all tableau SMEs and they will respond to questions via the chat window or you can send them a note privately if you want to do that.

If you plan to follow along today and don't have the presentation from yesterday, we will be using the “tableau workbook part 2 start”. So in the paperclip option in Lync or in the SharePoint, you will see that file, that is a great reference as your learning about data visualization and some of the cool charts and stuff. I picked that up a few years ago and these are in the tableau PowerPoint. There is one titled tableau part two start, and that's where we will be starting from and there’s a solution that you can use to reverse engineer or look at any of the parts of the presentation individually to see how it should have come out. You can look at that solution workbook. So all those resources are available to you in the session.

Then we would take a look at tableau's formatting menu. Filtering and sorting and then will get an introduction to table calculations.

So with that we will have quite a bit of material to cover. I do want to point out again that there is a wealth of information too if you just type the word tableau and then your question and you will get a nice list of resources back from Google directly. Here your top resources that tableau supports yesterday. A little bit of on demand which is helpful. We have the tableau lunch and learn series actually starting January 19. And if you're interested in having information on that, you can sign up at tableau user group where you can follow them and there's a little checkbox for you to receive notifications. We do send out all that information to the tableau user group. So if you signed up then you can click follow and there's a little checkbox or inbox and it will get an email and you posted that to the tableau user group. It's enough to help keep you informed. So I highly recommend joining the group.

I love to make clear to people that we say “data visualization” we are not just making pretty pictures, we are just not making the data look nice. We are reshaping the way people understand. We are putting it in a visual way that can provide a number of benefits to your audience. I have a little example here.

Oh good, it worked. So here is an example of something that is visually represented. If I tell my, I am an insurance agent and I tell a person that 20% of the property is covered is in a flood zone. It is not as impactful as if we knew 10% of those are whatever this represents is his purple area here where we actually have a whole flood in the warehouse.

So when you show people things visually versus when you say them, it can have real impact on how that information is received.

So it's really cool to watch people learn about that and be able to interpret data differently because the way that they are presenting it.

Some of the benefits are that it would reduce demand on human memory. So if you have a long flowchart or something along those lines, you can look at the current inventory for a fiscal year instead of just looking at a point of time, you don't have to remember what it is 12 months ago.

You can shift the audience’s perceptions. Just like the little view I just showed you. 20% of my property might be underwater in a flood zone one day is different than showing me that in that 20% is an outgoing.

Makes large amounts of data easily accessible, and grouping and structure for the user visually.

So another example of how it shifts perception is the example right here -- so if I ask you to count the number of sevens how many of you could do it quickly? So if I ask you to show me how many sevens in this view you can pick that out faster. You could do that superfast. You don't need time to sit and count up and down and put it in this one.

So now let's have a little interaction. This is the part that my husband got in his email that I love to show you. See if a few of you can come up with ideas about what is wrong with this visualization. So if you just take a second to think about it and give me a couple of ideas in the chat window and let me know whenever you see what is wrong with it.

Other than the fact that it's the University of Alabama, [ Laughter ], my husband is a Texas fan.

Good one. You guys are doing great. So first of all the pie pieces are the same size. We see support staff and game expenses and those are relatively close in size. Christopher brings up a good point. Even more than that think about that information we don't even know if they are referencing a dollar amount or percent.

My argument is for sure percent of the whole is the best time to use a pie chart. They are one of the only things I tried to use a pie chart so we would talk a little bit [ Laughter ] we will talk a little bit about you know how to do that. You can do much better showing it like a bar graph [ Laughter ]

So anyway, good job guys.

So before you get started with any data visualization try to ask yourself a few questions. What am I trying to say here? I am just painting a good picture of it. What am I trying to show to get my audience to visualize? Who is the audience? What kind of questions do they have? Will it be general or claims data? Can it distract as any to be something more high-level like the level of the doctor or the VISN and or something on those lines. Those are important questions.

So a couple quick tips to make you look better of course your chart at the same time, the first is that less is more. Really. This is a great background and the lines here are not really necessary. He could just clean up the view here by putting the money in a separate legend. Sometimes you just can put it right there on the chart.

Second -- is this the thermometer -- speedometer the best gauge of your measure? The reason this point in his because this bit of data is just showing point in time. If I'm high-level executive and I'm not keeping track of what our senses generally are, I might want access to that large amount of data so here I can see the expense have gone up a bit over time. This is what's called the trend line which is something I reference here. One of the things I have trouble with this is I don't know if this is just or 1.3. If they went up 1/10 of 1 million it's no big deal so it's good to show things this way but it's always use just the frame of reference so you can see what it is now.

So now my next point -- will be going to do -- this doesn't really work in dark lines as well but you just can use it as a frame of reference. So but in a pie chart, you generally want to keep it at zero -- you don't necessarily need to started at zero but the difference here is remarkable where here doesn't look as remarkable. This may not be as big as something to be concerned about.

Sometimes you just want to point out the differences instead of showing two lines along as a comparison so that is an interesting way to think about the data. Where we have the differences there. Use pies sparingly. We just talked about this. And always highlighting what is really important.

A couple more points to make. First of all color. One little tidbit that you may be interested in learning is a percent of the population is color blind in one form or fashion. There's different types of colorblindness. So some people can’t tell the difference between green and red. So you might use different shades of like a lighter shade of green in a darker shade of red depending on what you're trying to highlight because then somebody who is colorblind, even though they can't see between the difference between the green in the red, the can see it in a different viewer saturation.

Don't use color if it's not meaningful. So this is an example of where we have on the bottom lines the descriptor for what the column represents. So here we are saying that the descriptor across the bottom, but we're also indicating a here by color or a legend. It's not really necessary. So if you remove color in this case, it removes with the users think about something additional. You can use just the color to show the distribution like we did yesterday.

A couple of the things -- the use of plain text is not boring, it's legible. That's all we are concerned about. We are not trying to be fancy. And really don't need a lot of changes to drive the user to select the user's eyes. If you have too much going on it can be distracting. Sometimes movement can be distracting.

Some of the best practices is to use Arial, Georgia, Tahoma, Times New. I prefer these are some of the best fonts for tableau. Times new Roman and Georgia can be a little more difficult or better for print.

I have included tableau's visual analysis guidebook in the link here to the window.

Stephen Few has one of the leading edge guides undated visual relation. It is so interesting when I first got in to how the was his whole different kind of people around some of these contests.

So there's a number of chart types, but they go with different situations. So you're not going to use the same chart all the time necessarily -- a time series chart without dates.

So the first type we will look at and will build is the comparison chart. I am going to go ahead and share my screen a. So yesterday we built the comparison chart -- this is the chart we bought yesterday before we ended the presentation. And if you remember we left off with a calculated field. And left you all hanging there with that cliffhanger about the total RNs compared to the total FTE. So I will build another comparison chart using that field right now. And so to create a new sheet, I will come here in tableau and I will click on my new sheet button right here at the bottom. Or you can go to worksheet in there.

So I will create the view. I will drag the facility name onto the job so we would just write that right there. And now I will drag the rate of total FTE right here.

You can see tableau is automatically creating a chart for it.

So let me click on the label here and we'll go over this another minute. So if I click on show marked label -- this is where visualization can be so helpful. Look at this. When I scroll down, what happened here? We can see that we have the VAMC category is that 1044% of their FTE are RNs. So they have more RNs working there then they have total employees.

But here's the problem -- and here is why I love visualization. If I was looking at this in a data table in here, is to stop because it's 1044%, think about how much -- if I am just going around to be much harder to see that if we have a visualization that shows us that.

So we have more than one facility name that is listed as MC. So we're putting all the totals from the RNs back together with all the totals for everything and have the name of the facility if I drag on the city over here from the dimensions and I pull that onto my facility name, now you can see, if I scroll down to be AMC, there we go. -- VAMC -- We had so many cities of the same name it was aggregating that. It was doing what tableau was designed to do. Now we are able to see the view was off because of the way we’re thinking about the data. It’s one more little ship there and we get a better look at what's going on.

Are there any questions about that, so that is just another quick comparison chart and I wanted to run that out there how you can use visualization.

Okay so we will go ahead and start and move on from that. And now we're going to do is build a deck larger so what I would do is select my data, so if you click on your first item in this case we right click on accreditation in the window -- the dimensions window. Hold the control key and while holding the control key on the keyboard, click VISN and down under measures, click on total outpatients so you should have three items selected.

If you come to the upper right-hand pane here and click on the show me menu, you will see here all the different charts that tableau has for the data you have selected. So now I will click on stacked bars that is the second one down. If you hover you will see the title here at the bottom. And you can see tableau based on what I have selected build the information for me.

So before we move on to additional charts, I want to talk a little bit about formatting menu and all the options we have to work with tableau. Because so far we're just using this as kind of the wizard, so to speak,

so formatting is an important part of the presentation. But it's important to keep in mind that you should only format to the point that it adds to your visualization. Back to that visually appealing thing. You don't want to use tons of bright colors. Unless you want to startle somebody. And then you want to throw bright red and there, but for the most part you only want to use meaningful color to help you tell a story.

So the primary way in tableau that we touch a little bit right here in marks card in the others tableau formatting menu.

So at the top of the marks card I can change the chart type here so I can select another chart type and change the way tableau looks altogether.

I will go ahead and put this on automatic.

So let's say I want to edit the colors. So in this case all I have to do is click on the color option here on the CARF chart and you get a little pop-up and you can click edit color. And you can select another pallet entirely so telecoms of the predesigned tablet. And there's also ways for you to add your own color. We posted about that a while ago on the tableau user group. But you can use your own tallow pallet that's next people seem to have certain colors that they are drawn to so if I select another color palette here you can automatically say I will go ahead and sign these colors. It helps if you have like a huge list when you want all the designs to be done.

So in this case its edges want to create or assign a color to one so I can select the data item. So if I say I want to make any purple and I want to make dark gray and hit apply and from there we go the other way around. So there you have it. You can assign colors directly. You can also lighten or darken the colors. And you can even have a little border around their and make the change I like the borders, it looks clean.

So the size of the bars here is here and you can deflate that by clicking on the sites here and just do this directly. Adjusted if I put it all the way up they will be touching or other way down there will be little mini bars.

Let's say you want your sites to be variable based on some data field. So what I can do is actually drag when my data fields, solicit drag the field we are using a total outpatient visits. So I can use the and have the total outpatient visit up decides on the CARF chart . So in addition to being colored in that way, it's also size that way and this is like New York or something. So what you will see here as we now have this field and we will do a whole session on the difference between the green and the blue pills.. So we will have a session on that coming up in the lunch and learn.

But he can see this little indicator shows where or what this is assigned to. So you can see the accreditations and the color and the outpatient patients assigned and you can also change it and change it to something else. So to remove from the chart we can just do that right off. I thought that was nicer.

Label option here. I have already looked at a couple of times. We can show the labels but I can also drag -- it looks like right now it is just doing the totals. The total outpatient visit. Let's see. That's all it is. So if you see there you can hold the control down and drag from the row and create a copy of it which will create a shortcut for you. Now the reason tableau is not showing it with a purple the blue is because it doesn't fit. So we have all these options here in the format. I can, let me make a point here. When I click on label you see here how the text is linked. So if you click the label it would show that. But it will not be much formatting on the text label because as no values and text. So when I pull my outpatient visits onto label, it shows up as a text box or the label. If I click on label now you will see the text is here, and I can click these little [ Indiscernible ] and I can actually say something here.

I can save some and I can change the color for that, it can be really handy. You don't want too much on your view. You will probably do this when the tooltips which he would do here in second because would want to save this for every value because I'm just making a point here.

So you can say I actually change the text here on the label.

Some other things here -- noticed that because I change the font here, let me make it bold. Just for fun. If I come out here and make any change, like try to make it italic, [ Indiscernible ] but sometimes it drives me bonkers. So if I said here, you can really change it in two places. I was connected -- I swear it was not be connected but it is important to know that you have formatting here, and now so this is [ Indiscernible ] when I came in here I said it to 12, when I come in here it says it is now disconnected.

Connect desk I can also do things with alignment like I can flip it. So now chosen the whole label.

And I can also say allow it to overlap. So you see in the data here even though doesn't fit well, in the market here. But because I click allowed to overlap, it went ahead and populated there.

And that's pretty much -- oh you can just do the minimum and maximum. So here he will show I selected the mark label minimum and maximum. You may not want all the numbers on there, you just may want to show your high and low. You may only want to show the ones that are selected. He can also change the scope and say this is the minimum and maximum. For the cell. The cell is a very here so it is the same thing in this case. As you get more into table calculations you will see how the changes as you [ Indiscernible ] with the options.

But I am just going to drag that off and leave it blank. And then the detail shelf -- this is really handy especially if you have a lot of data that you want to include in your view, but you don't necessarily want to show on your view.

So right now you see when I hover over my information, I can see all the values. The accreditations in the views and total outpatient visits. But let's say I want to know the total FTE for that station as well. I don't want to appear on the view but I do wanted to be available in the hover. So I can do is just drive my total SDE using the detail button. And now when I hover, you will see there the value for total FTE.

So that's a way to add information to your view that people can see on the hover.

On the tooltips, here you can -- you will notice when I went to the option it added it to the tools automatically because it doesn't have to be one of the default is. I will include something from the tooltip by clicking on the drop-down on the field, and I can uncheck not to include that in the tooltip and then it will disappear.

Or I can go right click into the tooltip. Let me put that back in. And now click on the tooltip, and you will see the FTE when you add it back in.

And what you can do here this is really helpful sometimes and he can do this on formatting things to you can make it bold as the title, you can add some text like we did here. And you get that all nice and formatted. And you can preview it. And now we hover it just looks a little cleaner.

So that is one of the things that you can do.

Two more things. Oh, I do want to show you this. So now I have modified this bullet say I make a mistake and I remove the total SDE. But that's a field value. And I will answer the question just second. There is no, no, you don't even need to have it on the detail section. You can pull it over here from the tooltip. But sometimes for the details, but you might do is not even have it in the tooltip come up but you might want to make it available to somebody who downloads the data using Excel. So you might put additional details in for people to download, and not even make them available on tooltip. So that's a good question. I will show you just a second what I mean.

So I will go ahead and take this whole FTE off to answer the first question in more detail.

So now we just have on the tooltip for the outpatient, if you wanted to at that value back in, I could actually go total FTE. And appear in the insert menu, you will see all the different fields and variables that you can insert into the tooltip. So I could insert here the total SDE, the VA SN -- VISN. But if I answer that you will see it in the field. So I removed SDE so when I use the hover, they don't see the SDE on there, but it showing on the detail. So this is what is really helpful. Sometimes we don't want to show much but one additional information to be available to the user like file number or something like that.

So in this case somebody who has permission if they go to the worksheet export, you can select cross tabs to XL. And now when they download it, to the total SDE shows up. And that's because I had it in the detail but I didn't have it on the view.

It can be about places. It is pretty handy. Cool.

And finally, let's say you will notice there is the empty space here. If I change my chart type to shape, now we get this little option here for shapes on the mouse chart and I can change them all or I can click on more shapes, and I can select from here. Now if you notice, I don't have the option to select between and/a and yes. So what I would have to do now is drag my accreditation over to the pain here. And now when I click on shape I can say select something cute and silly here for yes and N/A.

Any other questions about the marks card?

Okay. The other way to get some formatting onto view is to use the formatting menu. And I really want you to get you can click format and click on any of these or so on. Or you can right-click anywhere in the view. Now sometimes right clicking somewhere in the view is very helpful because let me just give you a hint here. So by right-click and hit format, you will see it automatically comes up to the format font. And it's given me the default for the whole worksheet.

If I were to click on this column here and hit format, oftentimes it will change. Maybe not here -- format so here you can see when I click format on the here -- it can change the format menu. So if you ever get lost, just click that if you are interested in formatting or reformatting it yourself.

See you can see here from the format font channel, we have quite a few options. We have font, obviously. Then we have alignment. As the next option. We have shading. Change Shade to the view. Border and gridlines. Gridlines always get me. So there's a difference between sheet and rows and columns. It needs to be highlighted. So here I have none but you can clearly see there are gridlines in my view. If I click on row and I click none -- now my gridlines are gone. If I go back to a new sheet and add grid line you can see it added them on the rows and columns simultaneously.

You can see them on rows or sheets or columns. Always orient yourself with that. Same thing here is in every little pane that you have. Here if I want to format to all the formatting the workbook simultaneously, I can select my font, and now everywhere throughout the workbook, worksheet it has that -- not the workbook, I want to be clear -- just the sheet in the tableau.

I can change the font. All that good stuff.

Are there any questions about that?

And you need to know the borders. So just keep an eye out.

You can take a look at that in most of those are looking the references. We will go ahead and move on to time series. And I am on slide 31 in the presentation. I will go ahead and close my little format pain. Let me show you something here. This happens all the time to the tableau users. So let's say you want to work with more space here in your view, and you see this little button right here that can expand or contract. So you can actually hide that looking at your views, but people often notice that the data pain is just minimized at the bottom. So you can re-expand that. He can make it smaller and it shows appear at the bottom and there is the data pain again.

Alright so we would go to the next sheet. Write down here. And this time we will create a time series chart. This is why we added this cancel data into the data -- it did not come with their rated -- the original data.gov. I just added it with a little bit of information there.

So what I will do is I'm going to use the right mouse button now alright now let me show you first what happens if I use the left mouse button or by double-click. By double-click on my view, tableau will automatically going to smack will automatically start at the year level. You can expand it -- this is a hierarchal field and you can spend keep going until you get down to the date which as far as estate goes. But oftentimes I just want to show the data, that month, day and year. But this case was a month and year. So I can just save myself a little time here and just use the right mouse button to click and drag on simple dates. And I will drag it over and drop it on the column shelf.

You will see here you get the drop field menu. And he said okay had I want to drop the date? And we can put the real data in or whatever. We are just good to the month of the year. So I can select month or year. Let's do that where we can take some time and a want to learn session to talk about discrete and continuous values. In this case we will use month and year as a discrete value. Using eight single point time instead of a continuous frame. Now still knows but he goes in a certain order. And here you can see Mac and then to kind of turns into a chart, we're just going to do let's see -- we will drag total outpatient visits again. We will drag that up to the row shelf. And now we have a line for the total number of outpatient visits. And I will drag my color -- with the in-house emergency services. In-house services, there we go, emergency department. That's a strike that on the color from the marks chart. Now we have built a chart without using the show me menu but you can see here what kind of you that tableau is recommended. So we can build it without the shelving just by moving things onto the dashboard where they belong. And now we can see by facility that has the in-house emergency services, how many total outpatients the facilities have.

I will go ahead and rename the sheet

Okay the next chart type will be a correlation or relationship. Where we look at the value of two different values and see if there is any relationship between two things.

So in this one that we would take a look at the total outpatient visits to total employees.

So where we have a higher number of employees I have a higher number of outpatients. That sounds obvious. But if I hold down the control key again and select my three total SCEs, total outpatient visits and let's select the VISN name here. I click on the show me menu and you can see here tableau is automatically selected a chart I will click on my scatter box. And now we can see RBC there's a relationship there because of the way they fall on the scatter chart. We have more SCE we also have more outpatient users.

You can flip that depending on if you want that across the bottom by using the plot menu here if you remember or controlled W will also swap.

You can add a trendline to this chart really easily. Just right-click on the chart and here I can say trendline, and now tableau is showing the flow from outpatient.

Now you can edit those, just right-click to edit. You don't have to show a confidence band, you can just show one nice line. You can change the type of model that you are using. And there you see it. And then I will go ahead and rename the chart. By double-clicking here and saving it as data plot.

Okay let's take a stab at distribution. So this can be a little bit tricky for folks at first to understand mentally if they haven't worked a lot with distribution charts. And I want to point it again, this is a going to be a graphic distribution of numeric data. It's not necessarily meaningful is what we're going to use. But it will show you the concept of how to create a histogram.

So we have this little guy right here and that's what we will use to show the curve, similar. So here's my new sheet. And this is so cool. Now on the show me menu, you will see where it gives me the options for histogram. So I will just click this. And now, under my dimensions, tableau has created the dimension called unique patient pin. It has gone through and evaluated the number of patients that had X number of unique patients. Or the number of facilities. And it is put them in these categories. So these are my been types, so let's see -- the medications pin is 6000. Again this is at an angle. I click a dimension on their it is going to -- my histogram goes away. So you start with something like total SCE. And here's number of total ST in this been. So the bin is where -- let's look at the bin. I can edit my been value if I right-click here on the dimensions. Like we said yesterday all your options and properties associated with the right-click menu. So that if I go here, I will edit in this case -- and it brings up the bin menu. I can actually change the size of my bin. So right now the bin size is 6230. If I change that to 500, and click okay, I want to switch back my unique patient and my and I need to get rid of you guys. Oh because I canceled so before I change the pin size I have a lot more pins. Tableau suggests 6,230. Went it has created the bin which obviously looks much better.

So as example of how we use this, we might look at the number of clients created in a single day or how many days a year do you have what was completed 50 or more claims or 100 or more claims and gives me a count of the number of days. So it's a really handy and useful tool to use and if you're familiar with distribution charts or any of those charts, you have the bin names to do that.

Okay. Geospatial charts. So I did something on purpose here in the data. If you see here there is a column called ST, right and it is just listed Dallas and EBT. And if I drag that over, obviously the two letter state code. But if I select ST in total SCE for example, here is my map option because you can see some selected because tableau doesn't recognize these as a geographic value. So what we could do with tableau is reassign this to a geographic role in the metadata. Member how we added the metadata? So if I click here on the ADC, I get this option for geographic role. I can tell tableau if it state and province but if I didn't name the field STD, tableau would have figured out. A kind of does it on purpose so we can show you the geographic value. So again just select the drop-down. Geographic role, you can right-click on that field as a geographic role now I have the selected and I have this menu expanded you can see it's giving me the feedback option.

So what I'm going to do for this visualization is I will hold down the FT for state and I will -- ST for state and hold the control key and select total SCE and I will select the field map which is the other option here in the second row.

And just like that, tableau has shown us the number of total SCE for state parks

Now there's a couple things to know about on the geographic map. One is this map, map layers here, I would call it map options but map layers. We can do a little bit of clean appear. We can change at the background a little, we can remove the country and region name. You know, all that good stuff. You can wash out entirely if you want to. You can select the hover over this menu here. And you can actually just click this little drag guy and you can drag here. And now you can see that there is a pinpoint here. You have actually changed the map.

If you wanted to -- what we have to do is dashboard is create one map to the US, one map for Hawaii, one map and then he can line them up on the dashboard so that's all the value show but they are not there on the map in a strange way.

And that's it. That's geographic data right there. Or geospatial.

I will save my work. Tableau is not like Excel. If you lost your work, you lose your work, so you want to save often.

And then finally we'll talk about our friend the pie chart. My team, my team gave me a hard time when I put pie charts and I figure people will use them so they should be using them right, right?

So to create a pie chart, what you want to do is keep in mind that they should only be used to represent parts of a whole. And if you have thousand categories, like that map I showed you the beginning of the presentation, you really should consider another chart type.

In this case we would just have two values. So I will hold the control key and I will click on in-house services nursing home. Right here. And then I will click on registered nurses SCE.

And you can see you have a little teeny pie chart appear in the corner. I like to make this little bit bigger for my work. So up here you will see I have the drop-down. I can change this by chart to fit the entire view. So it's right appear in the toolbar, hit entire view. And now I'm going to show you a table calculation. So the difference between a table calculation in a calculated field is a calculated field lives here in the dimension, where the table calculation is just going to happen in your view. And as it changes, the table updates with the new calculation. So here, let me go ahead and put my label on and I will click on label and show Mark label. And here you can see we have a value. We have 3958 registered nurses who work in a place where they have an in-home nursing home unit in the facility.

So let's say we want to show this percentage. Like all I have to do is at a table calculation is a do it in the view, so I select the drop-down here. This will be next to the flight. Or the proper angle. And I can select here quick table calculations from the drop-down.

So I select table calculation and in this case I would select a percent of total. And now you see tableau is automatically calculating and I didn't have to change the field or add anything because it's on one filled with two different dimensions but in the view here is going to go ahead and run that up.

And now you can see this is a calculated field and I can't hover over it or it changes right here. So you see the little triangle is there's little calculation on that field and that the indicator of that.

And that is it for table calculations. And I will rename my sheet pie chart.

And we will have a session on table calculations in the lunch and learn series. But tableau does have a whole reference on that. So if you're just in learning more about it, there is some complexities, so don't get you know, it's not Excel, remember. I will not -- I will keep repeating that so it's not Excel you will run into issues on occasion where you can't get the calculation to quite do it the way you want it you may want to do a little bit of research on that.

The last thing I want to show you before we round out today is filtering and this will be pretty quick. So tableau is multifaceted. It can be created on dimensions or measures. They can be calculated in contextual so for example the top 10, 10 -- 20 categories, they can meet a variety of date types or variety of data types. Face value, text, anything along those lines. And it can be applied to one or more views or the entire workbook. We'll go into that a little bit more tomorrow will talk about ash boarding. For now let's just look at how we get a few filters on there.

So that the back to something like our accreditation here to work with. So a quick way to get a filter on a view is actually in the view itself. Let's say I want to exclude VISN 10 from the data. I can ask you just right click on that he considers options to include or keep only, if I say keep only, now all we have is VISN 10, and you will notice appear on the filtered shelf, it applies a filter.

Or if I had said exclude, it would have click the put the VISN on the shelf here and then you see it on the view.

So that's what might to get a filter on.

Another way to get a filter on is to just drag it right onto the filter shelf. So let's say I wanted find out about joint commission accreditation -- I can drag this joint commission accreditation here to filters. And drop it there. Okay well that's a very good example because is only one option. So let's go ahead -- okay there we go. So the in-house services emergency department -- department, if I only want to see those VISN where there's an in-house emergency department, I can click yes and I can click apply, you will see the view here and it's updated.

Now you can edit the filter bike coming here and select filter and have the other option, or you can select the drop-down here and that's the filter and it shows filter. And you can see over here right above the legend you can go back and say yes, no, or all. Even he can change the way a filter looks by using the drop-down menu on the filter itself. You can see there's multiple filter types. You can use the drop-down, you can, and you can only allow a single choice. You can allow multiple values. You can have someone type the file numbers or Social Security numbers. If it something like just a small list or a list of values [ Indiscernible ] that's a way to do it if you did have a large user data with a lot of numbers or text fields and it, then every time tableau builds a filter it has to recalculate all the values. So think about that, tableau is going to the data and is asking the data okay which I put in the filter. So that's why you got the wildcard values for things like social security number, it doesn't require tableau to work as hard on single [ Indiscernible ] with the Social Security numbers, even they would prefer type.

So keep that in mind.

So that's that option. Another view is to put a quick filter on in the view, so I could just select the drop-down here from VISN and say show filter and there's all my VISN.

And then I can just change those and save what people to look you know to be able to select audible but we don't want to see that on the list, you can select that is a drop-down and then people can select their option.

And that is it for quick filtering.

Are there any questions about filtering? Or anything else -- that brings us to the end of the session.