Welcome
How to Aggregate Friends and Influence Pivots

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Agenda

6 things this presentation will do for you
A little bit about us
Tableau prep prepper
Aggregating friends (aggregation overview)
Influencing pivots (pivot overview)
The <X> example
6 Things This Presentation Will Do For You

Get you out of a mental rut, give you new thoughts, new visions, new ambitions
Enable you to make aggregates quickly and easily
Make the principles of pivoting easy for you to apply in your daily flows
Help you coordinate pivots to your way of thinking
Increase your popularity
Help you to handle complicated data, avoid clutter, keep your flows smooth and pleasant
A Little Bit About Us
What is Tableau Prep?
Tableau and Tableau Prep

Tableau
Helps people see and understand their data

Tableau Prep
Helps people clean, combine, and reshape their data
Aggregation Overview
What is an Aggregation

Reduces the number of rows
Changes the level of detail
Using several different possible methods; sum, avg, min, max, etc
Tableau Aggregations
Aggregate Everything

Tableau Desktop aggregates every pill put on the [canvas]. You can change the aggregation method used for each pill. LOD calcs allow for more aggregation control.

Aggregations occur only after all joins and unions take place in the data pane.

Up until now, the only way to aggregate before joins/unions, custom scripts or complicated ETL processes.
Tableau Prep Aggregations
Aggregate at Your Own Speed

Aggregate node gives full control over what fields get aggregated, and when.

Allows you to aggregate each field to a different aggregation method.

Allows you to select the fields the aggregations are grouped to (LoD equivalent).

Aggregate anywhere in the flow (before joins & unions!!).

Familiar aggregation methods, including custom date parse functions (more to be added in the future).

All fields left out of the aggregation, are removed from the node.
Advanced Aggregation
Cool, but why?

**Talk through simple aggregation case.**
(Arthur has good example)

**Talk through advanced aggregation case.**
(Arthur has good example)

Watch out!
Fields left out of aggregation node are removed from flow.

**Need more pitfalls**
Pivots Overview
A pivot by any other name would be functionally equivalent

Issa Beekun
Software Engineer, Tableau Software
What is a Pivot\Melt\Fold\Gather\Unpivot

Whatever the name, it is the transformation of columnar data into row data

Steps for a successfully pivot:

**Identify**—Determine which column headers contain useful information

**Select**—Choose the columns by hand or with a dynamic rule

**Rename**—After the new ‘Pivot Names’ and ‘Pivot Values’ columns have been created, update these with more contextual info

**Clean**—Remove nulls and change pivot column data types as necessary
Tableau Pivots
<table>
<thead>
<tr>
<th>Quarter</th>
<th>Samsung</th>
<th>Nokia</th>
<th>Apple</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q4 '11</td>
<td>96.8600</td>
<td>111.7600</td>
<td>36.4600</td>
</tr>
<tr>
<td>Q1 '12</td>
<td>95.2600</td>
<td>93.1600</td>
<td>33.1200</td>
</tr>
<tr>
<td>Q2 '12</td>
<td>90.4200</td>
<td>93.4200</td>
<td>20.9400</td>
</tr>
<tr>
<td>Q3 '12</td>
<td>97.9600</td>
<td>82.3600</td>
<td>24.6200</td>
</tr>
<tr>
<td>Q4 '12</td>
<td>106.9600</td>
<td>85.0500</td>
<td>43.4600</td>
</tr>
<tr>
<td>Q1 '13</td>
<td>100.6600</td>
<td>63.2200</td>
<td>38.3500</td>
</tr>
<tr>
<td>Q2 '13</td>
<td>107.5300</td>
<td>60.9500</td>
<td>31.9000</td>
</tr>
<tr>
<td>Q3 '13</td>
<td>117.0500</td>
<td>63.0500</td>
<td>30.3800</td>
</tr>
<tr>
<td>Q4 '13</td>
<td>119.2100</td>
<td>63.5800</td>
<td>50.2200</td>
</tr>
</tbody>
</table>
Tableau Desktop allows pivoting using the built-in functionality or custom SQL statements. The pivot calculation must be done before any other operations on your data.

Pivots are limited to one per data source/no coordinated pivot cases.
Tableau Prep Pivots
Pivot Perfected

Insert a pivot node wherever you need it.

Chain as many pivot nodes as you need.

Quickly search for related fields to pivot.

Coordinate your pivots across multiple related fields.

<Might not be in by TC> Wildcard pivoting allows even more flexibility.
Advanced Pivot
Cool, but why?

**Talk through simple pivot case.**
(Arthur has good example)

**Talk through advanced pivot case.**
(Arthur has good example)

Watch out!
Pivots result in a lot data duplication after they are calculated.

**Need more pitfalls**
The <X> Example
Please complete the session survey from the Session Details screen in your TC18 app.
Thank you!

Contact or CTA info goes here
TABLEAU CONFERENCE