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Getting Started with Tableau Working with Custom Queries Lab#6

Description:

BISP is committed to provide BEST learning material to the beginners and advance learners. In the same series, we have prepared a complete end-to end Hands-on Beginner's Guide for Tableau Reporting. The document focuses on using custom SQL. Join our professional training program and learn from experts.

History:

VersionDescription ChangeAut0.1Initial DraftSur0.1Review#1Am

Author Surbhi Sahu Amit Sharma Publish Date 21st Aug 2012 29th Aug 2012

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The Return products with the Returned Percentages

Here is a data model which has four tables **OrderHeader**, **OrderDetail**, **Returned item** and **Product**. We wants to fetch those products which get returned back after the supply and its corresponding **quantity**, **returned quantity**, **vendor name** (from where the product get returned) and the **percentage of the quantity return** of the total quantity.





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Step 3) Then go to custom Sql , here add the query for fetching the returned product.s and here the query is used

Select p.productname,h.vendorname,sum(returnquantity) as ReturnQuantity,

sum(quantity) as Quantity

from Product p,Returneditem r,Orderdetail d,Orderheader h

where r.orderdetailcode=d.orderdetailcode and d.productnumber=p.productnumber

and d.ordercode=h.ordercode

group by p.productname, h.vendorname

Edit Custom SQL

```
select p.productname,h.vendorname,sum(returnquantity) as ReturnQuantity,sum(quantity) as Quantity
from Product p,Returneditem r,Orderdetail d,Orderheader h
where r.orderdetailcode=d.orderdetailcode
and d.productnumber=p.productnumber
and d.ordercode=h.ordercode
group by p.productname,h.vendorname
```

Step 8) Apply the query this will result the four fields productname ,vendorname ,Quantity and returned quantity.

Dimensions

- Abc productname
- Abc vendorname
- Abc Measure Names

Measures

- =# Percentage of Return Quantity
- # Quantity
- # ReturnQuantity

Step 9) Now drag and drop the productname field in the Rows shelf and right click on the field Quantity and choose the option Add to sheet do the same procedure with the field ReturnedQuantity.

Add to Sheet
Show Quick Filter
Сору
Paste
Duplicate
Rename
Hide
Create Folder
Create Calculated Field
Create Group
Create Bins
Create Parameter
Convert to Discrete
Convert to Dimension
Change Data Type 🔹 🕨
Geographic Role 🕨
Default Properties
Replace References
Describe

Quantity^L

Step 10)Now here the table will be.

Title Returned Produc	t With The Percentage (Of The Quantity Retu	r
productname	Quantity	ReturnQuantity	
Aloe Relief	172	14	*
Bear Edge	422	68	
Bear Survival Edge	888	268	
Blue Steel Putter	62	48	Ε
BugShield Extreme	168	8	
BugShield Lotion	354	194	
BugShield Natural	114	12	
BugShield Spray	232	14	
Calamine Relief	38	2	
Canyon Mule Carryall	536	294	
Canyon Mule Climber	610	166	
Canyon Mule Cooler	188	38	
Canyon Mule Extreme	66	16	
Canyon Mule Journey	38	22	
Canyon Mule Weekend	352	60	
Compact Relief Kit	18	2	
Course Pro Gloves	220	154	
Course Pro Golf and T	110	84	
Course Pro Putter	44	18	
Course Pro Umbrella	88	8	

Step 11) Calculating the percentage of returned item, we Right click on the measure shelf then Select the option create calculated field from the available options.

Add to Sheet
Show Quick Filter
Сору
Paste
Duplicate
Rename
Hide
Create Folder
Create Calculated Field
Create Group
Create Bins
Create Bins Create Parameter
Create Bins Create Parameter Convert to Discrete
Create Bins Create Parameter Convert to Discrete Convert to Dimension
Create Bins Create Parameter Convert to Discrete Convert to Dimension Change Data Type
Create Bins Create Parameter Convert to Discrete Convert to Dimension Change Data Type Geographic Role
Create Bins Create Parameter Convert to Discrete Convert to Dimension Change Data Type Geographic Role Default Properties
Create Bins Create Parameter Convert to Discrete Convert to Dimension Change Data Type Geographic Role Default Properties Replace References

Step 12)Then the popup window will appear, here all the field display in the Fields tab and

Calculated Field [Percentage o	f Return Quantity]		
Name: Percentage of Return	Quantity		
Formula:			· · · · · · · · · · · · · · · · · · ·
(SUM([ReturnQuantit	<pre>cy])/SUM([Quantity]</pre>))*100	
The calculation is valid.			Clear
Fields:	Parameters: Crea <u>t</u> e	Functions: <u>H</u> elp	
☐ OrderDetail+ (GoS ▼	🗎 All 👻	All 🗸	Number of Records
Enter Text to Search	Enter Text to Search	Enter Text to Search	Data tupor Integer
Abc productname	# Percentage of Retu	ACOS	Status: Valid
# Quantity		ASCII	1
Abc vendorname		ATAN	
		ATAN2	
		AUR	
		CASE	
		CHAR	
		COS	
		COT	Describe
Changes to this calculat Worksheet "Sheet 5"	tion might change the following:		OK Cancel Apply
			±.
lumber of functions.	We can choose any fi	unction from the list	of available functions. Then write
he expression for calc	ulating the percenta	ge (sum(ReturnedQua	antity)/sum(Quantity))*100 this
vill save the result of t	the expression in the	new separate field a	nd we have given the name
ercentage of returned	l quant <mark>ity</mark> for this file	ed.	
tep 13) How right clic	k on the field percer	ntage of	
eturned quantity an	d choose the	Ŭ	Add to Sheet

 Returned quantity and choose the Option Add to sheet.
 Show Quick Filter

 Copy
 Paste

 Duplicate
 Rename...

 Hide
 Create Folder...

 Create Group...
 Create Bins...

 Create Bins...
 Create Bins...

 Convert to Discrete
 Convert to Dimension

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Step 14) Then the result will be display the total Quantity, returned quantity and the percentage of returned quantity .

Title Returned Produ	ct With The Percentag	ge Of The Quantity Retu	urned	
productname	Quantity	ReturnQuantity	Percentage of Return Quan	
Aloe Relief	172	14	8%	*
Bear Edge	422	68	16%	
Bear Survival Edge	888	268	30%	
Blue Steel Putter	62	48	77%	=
BugShield Extreme	168	8	5%	
BugShield Lotion	354	194	55%	
BugShield Natural	114	12	11%	
BugShield Spray	232	14	6%	
Calamine Relief	38	2	5%	
Canyon Mule Carryall	536	294	55%	
Canyon Mule Climber	610	166	27%	
Canyon Mule Cooler	188	38	20%	
Canyon Mule Extreme	66	16	24%	
Canyon Mule Journey	38	22	58%	
Canyon Mule Weekend	352	60	17%	
Compact Relief Kit	18	2	11%	
Course Pro Gloves	220	154	70%	
Course Pro Golf and T	110	84	76%	
Course Pro Putter	44	18	41%	
Course Pro Umbrella	88	8	9%	
Deluxe Family Relief Kit	34	18	53%	
Double Edge	1,032	324	31%	
Edge Extreme	232	180	78%	
EverGlow Butano	CC0	400	2007	-

Step 15)Now Goto the new sheet and drag and drop Product Name in the rows shelf and Percentage of returned quantity in the column shelf from the measure.

Step 16)Now click on the bar chart from Show me toolbar.



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Step 17)Now the bar chart will be displayed, which shows the percentage of returned quantity of the product.

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Step 18)Then we have create the joins between the tables country, Conversionrate ,Euroconversion ,Orderdetail ,product and SalesBranch.

Microsoft Access Connection		×)		
Step 1: Select a Microsoft Access	s database file:		1		
C:\Users\ABC\Desktop\GoSale	es1.accdb	Browse			
Use Workgroup Security w	nen connecting				
Step 2: Select the table or query	to analyze:				
 Single Table Multiple T 	ables 🔘 Custom SQL				
Table Alias	Foreign Key				
Product ConversionRate Country Dim_Salesbranch EuroConversion OrderDetail Add Table Edit Step 3: Give the connection a na ConversionRate + (GoSales 1.a	[Country].[Saleascountrycode] [Product].[SaleasCountryCode 1] [Country].[Saleascountrycode] [Country].[Saleascountrycode] [Product].[ProductNumber] Remove me for use in Tableau: accdb) (copy 2)	ew Results			
	ОК	Cancel		Dimensions	
Step 19)Now all the field	ls will get imported in t	he workshe	eet.	Abc productname Abc Measure Names	
				Measures # Revenue	
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Step 20)Then we have to fetch those products having the highest revenue from all of the products , so here we have used the query which will results those products which having the revenue greater then 50000.The query used here is

select productname,SUM(Quantity*unitprice) as Revenue from orderdetail,product where orderdetail.productnumber=product.productnumber and (Quantity*unitprice)>50000 group by productname

Microsoft Access Connection		×	
Step 1: Select a Microsoft Access of	atabase file:		
C:\Users\ABC\Desktop\GoSales	L.accdb Br	owse	
Use Workgroup Security whe	n connecting		
Step 2: Select the table or query to	analyze:		
🔘 Single Table 🔘 Multiple Tab	les 💿 Custom SQL		
<pre>select productname, SUM where orderdetail.prod group by productname Step 3: Give the connection a name ConversionRate+(GoSales1.acc)</pre>	(Quantity*unitprice) as R uctnumber=product.product e for use in Tableau: :db) (copy) OK Ca	number	
	· · · ·		·
Edit Custom SQL select productname, SUM where orderdetail.produ group by productname	(Quantity*unitprice) as r: uctnumber=product.product	l from orderdetail,product number and (Quantity*unitp	rice)>50000
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having the	III View Data: Cu	istom SOI	
	12 rows	~	
ingnest revenue.	1310WS		
	productname		Revenue
	Canyon Mule E	Extreme Backpack	258,309.60
	Canyon Mule J	ourney Backpack	218,212.36
	Glacier GPS Ex	treme	57,596.16
	Hailstorm Stee	Woods Set	268,264.44
	Hailstorm Titar	nium Woods Set	1,096,547.92
	Hibernator Ext	reme	234,971.24
	Husky Rope 10	00	200,284.56
	Mountain Man	Extreme	75,148.92
	Star Dome	:	5,731,062.98
	Star Gazer 2	:	2,925,462.60
	Star Gazer 3		4,247,815.16
	Star Gazer 6	:	1,946,339.60
	Star Lite		170,800.00
Rows ProductName			
Rows ProductName		Add to Sheet	
Rows ProductName		Add to Sheet Show Quick Filter	r
Rows ProductName E Step 25) Now right click on the field percentage of Revenue and choose the Option Add to sheet.		Add to Sheet Show Quick Filter Copy	r
Rows ProductName Step 25) Now right click on the field percentage of Revenue and choose the Option Add to sheet.		Add to Sheet Show Quick Filter Copy Paste	r -
Rows ProductName Step 25) Now right click on the field percentage of Revenue and choose the Option Add to sheet.		Add to Sheet Show Quick Filter Copy Paste Duplicate	r -
Rows ProductName E Step 25) Now right click on the field percentage of Revenue and choose the Option Add to sheet.		Add to Sheet Show Quick Filter Copy Paste Duplicate Rename	r
Rows ProductName		Add to Sheet Show Quick Filter Copy Paste Duplicate Rename Hide	r
Rows ProductName Step 25) Now right click on the field percentage of Revenue and choose the Option Add to sheet.		Add to Sheet Show Quick Filter Copy Paste Duplicate Rename Hide Create Folder	r
Rows ProductName Step 25) Now right click on the field percentage of Revenue and choose the Option Add to sheet.		Add to Sheet Show Quick Filter Copy Paste Duplicate Rename Hide Create Folder Create Calculated	r
Rows ProductName E Step 25) Now right click on the field percentage of Revenue and choose the Option Add to sheet.		Add to Sheet Show Quick Filter Copy Paste Duplicate Rename Hide Create Folder Create Calculated Create Group	r d Field
Rows ProductName L tep 25) Now right click on the field percentage of evenue and choose the option Add to sheet.		Add to Sheet Show Quick Filter Copy Paste Duplicate Rename Hide Create Folder Create Group Create Bins	r d Field
Rows ProductName E tep 25) Now right click on the field percentage of evenue and choose the option Add to sheet.		Add to Sheet Show Quick Filter Copy Paste Duplicate Rename Hide Create Folder Create Group Create Bins Create Parameter	r and field
Rows ProductName L tep 25) Now right click on the field percentage of evenue and choose the option Add to sheet.		Add to Sheet Show Quick Filter Copy Paste Duplicate Rename Hide Create Folder Create Calculated Create Group Create Bins Create Parameter Create Parameter Convert to Discret	d Field
Rows ProductName L tep 25) Now right click on the field percentage of evenue and choose the option Add to sheet.		Add to Sheet Show Quick Filter Copy Paste Duplicate Rename Hide Create Folder Create Group Create Bins Create Bins Create Parameter Convert to Discret	d Field f ete nsion
Rows ProductName L tep 25) Now right click on the field percentage of evenue and choose the ption Add to sheet.		Add to Sheet Show Quick Filter Copy Paste Duplicate Rename Hide Create Folder Create Group Create Bins Create Bins Create Parameter Convert to Discre Convert to Discre Convert to Dimer	r d Field f ete nsion be
Rows ProductName tep 25) Now right click on the field percentage of evenue and choose the prior Add to sheet.		Add to Sheet Show Quick Filter Copy Paste Duplicate Rename Hide Create Folder Create Group Create Group Create Bins Create Bins Create Parameter Convert to Discre Convert to Discre Change Data Typ Geographic Role Default Propertie	d Field f ete nsion be be be
Rows ProductName		Add to Sheet Show Quick Filter Copy Paste Duplicate Rename Hide Create Folder Create Calculated Create Group Create Bins Create Bins Create Parameter Convert to Discre Convert to Discre Change Data Typ Geographic Role Default Propertie	d Field r ete nsion be b s b

Step 26)Now this is the table created where the products displaying who have highest revenue and its corresponding Country name, currency name and Revenue yearly.

Step 27)Now drag and drop the Product name in the Rows Shelf and Revenue Yarly in the column shelf From the measure shelf. Step 28) Now click on the bar chart from Show me toolbar.

	11 Colum	ns AG	G(Revenue Year	·ly)
	Rows	Pro	ductName	
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	itte. 🔳	Show I	Ие	
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	1995	5. M.S.		
			h da d	
-		888	8888	
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		<u></u> ,	•:•	
	For horize	o <mark>ntal bar</mark> s e dimens	s try	

1 or more measures

Step 29)Now we want the Top 10 products who having the highest revenue so here we will apply the filters. Select the option Top and here apply the condition for top 10 products who having highest revenue then Apply then ok.

ter (productionie)	
General Wildcard Condition Top	
None	
Ø By Field:	
Top ▼ 10 ▼ by	
Revenue Maximum	•
By Formula:	
Top 🔻 10 👻 by	
Parent OK Canad	Apply
	Арріу

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Step 30) Now the chart have been created here which is giving the top 10 product who having highest revenue.