Free Training Transcript: Number Calculations

Welcome to this Number Calculations Video. You can download the Exercise workbook to follow along in your own copy of Tableau.

Data Validation - Nulls to Zeroes

In this dataset, we have sales quotas for some, but not all of our countries. Our main goal is to compare the sales to their quotas but we cannot compare a number to a null, because null means unknown. We need to convert our nulls to zeros so that we can do a comparison. Right-click in the data pane and select create calculated field. We'll name it Corrected Quotas. And type ZN(. The zero null function returns a zero wherever there is a null. We can think of this function as asking "Is there a quota for this country? If not, give it a zero." Drag out Quota, and close the parentheses. Now if we bring out Corrected Quotas we see zeros where we had nulls before. Now we can move on and continue to analyze our data without worrying about hitting null values.

Difference from Quota

So let's look at just how different our sales are from our quotas. We'll start by creating a new calculated field. We'll call this Difference. We'll want our SUM(Sales). Minus the SUM of our quotas. And make sure to use the corrected quotas so we don't run into those null issues. SUM(Sales)–SUM(Corrected Quota). Let's bring this into the view. We can now see which countries are below quota and by how much. Taiwan, Portugal, and Austria are pretty big outliers in the positive direction, because those are the instances where we have a quota of zero, so the difference is pretty vast. We should probably go back and give these countries quotas.

Conclusion

Thank you for watching this Number Calculations Video. We invite you to continue with the Free Training videos to learn more about using Tableau.