



Free Training Transcript: The Pivot Step

Welcome to this video on the Pivot Step in Tableau Prep. You can download the data set and packaged flow file underneath the video to follow along in your own copy of Tableau Prep. We're working with data for bestselling books.

The Context for Pivoting

If your data has multiple fields for the same attribute, or if there is unique information stored in the field name (such as the fact a given book is on the Hardcover Nonfiction bestseller list), your data may need to be pivoted.

In our example, we have a week's worth of bestseller data that has multiple fields all containing the same information about the bestselling books. Additionally, the field names are the bestseller lists. To analyze this data effectively, we need to pivot it so we have a column for book information and a column for bestseller list.

How to Pivot

To get started with a pivot, we need to add a pivot step. Click the plus on the previous step, and select "Add Pivot". A new pane opens below, allowing us to configure the pivot.

On the left we see the list of fields in the data source. In the middle we have a drop area for Pivot1 Values, and to the far right we see the pivot results displayed similarly to the profile pane and data grid.

Let's think about what the pivot should be. Each of the fields, other than Rank, contain the same type of information about each bestselling book. And the names of the fields should be their own column of information as well. We'll multi-select everything but Rank, and bring all those fields to the drop area.

In the results area, we can see two new fields--Pivot1 Names, containing the names of the original fields, and Pivot1 Values, containing the values of the original fields. We can rename these to List and Info.

Modifying the Pivot Step

If we want to add a column to the pivot, we simply drag it in. But it doesn't make sense to include Rank in a column with information like title, so we'll remove this column from the pivot by dragging it back out.

Tableau Prep is smart enough to realize if there's a shared value in all the members of a new field, it can rename the field for us. If we don't want this feature to come on when applicable, we can simply uncheck the box.

Multiple Pivot Groups

We have another data set that is structured differently. Here, there are two columns of data per bestseller list—one for author, and one for title. Ideally, we would have a column for bestseller list, a column for all authors, and a column for all titles. To achieve this structure, we want to perform coordinated pivots, or pivot multiple groups at the same time.

We'll add a Pivot Step. Then simply select the fields that should be a single field—we'll pick all the Author fields—and bring them to Pivot Values 1. Note how the shared values automatically populate the Pivot1 Names field. Next, we'll click the plus to the right of the automatically named new Author field to add another Pivot Values drop area. Multiselect the Title fields from the left and bring them over.

In the pivot results to the far right, we now see our data structured exactly as desired—a field for Title, List, and Author--and of course Rank.

Conclusion

Thank you for watching this video on Pivoting in Tableau Prep. We invite you to continue with the free training videos to learn more about using Tableau.

