

Formatting Data in Excel to Use in Tableau Public

PITTSBURGH DATA JAM

1. Dimensions vs. measures

Tableau separates information in two ways, dimensions and measures. This separation makes graphing and visualizing data easier later on. When formatting your Data in excel keep this in mind and prepare to recognize the difference.

- Our “dimensions” are what we would think of as headings. Dimensions are what we are measuring with our data.
- Our “measures” are the data we were given or collected. Measures describe our dimensions, and are most commonly in the form of numbers.
- For example, Things like countries and states are dimensions, where as the population of those countries and states are measures.

2. Rows and columns

Sometimes data sets that are given to you are formatted in a way that is easy to read, however will not transfer into Tableau Public very well. One common problem is column and row format.

- Data sets that are given to you may have columns with headings and subheadings. To transfer data like this over, we have to create a new column for every subheading.
- Notice the figure below, the first column is broken up into sub-headings: state, institution type (public or private), and institution name. The headings are moved into their own column. This allows Tableau to track each dimensions separately, and will lead to better working in Tableau.

	A	B	C	D	E	F	G	H	I
1	TABLE 6. Science and engineering research space in academic institutions, by state, control, institution, and field: FY 2011								
2	(Net assignable square feet in thousands)								
3			Agricultural and natural resources	Biological and biomedical sciences	Computer and information sciences		Health and clinical sciences	Mathematics and statistics	Physical sciences
4	State, control, and institution	All fields	sciences	sciences	sciences	Engineering			
5	Alabama								
6	Public								
7	AL A&M U.	104	70	7	1	20	0	1	5
8	AL State U.	147	0	70	2	0	29	35	11
9	Auburn U. main campus	443	157	28	0	190	80	*	44
10	U. AL Birmingham, The	693	0	317	1	28	571	2	18
11	U. AL Huntsville, The	260	1	15	22	120	13	5	83
12	U. AL Tuscaloosa, The	192	0	33	7	72	0	0	62
13	U. South AL	185	1	99	2	16	37	*	6
14	Private								
15	Tuskegee U.	309	96	28	13	153	19	0	0
16	Alaska								
17	Public								
18	U. AK Fairbanks	336	130	89	2	31	0	0	80
19	U. AK Southeast	11	*	6	0	0	0	0	4
20	Arizona								
21	Public								
22	AZ State U.	648	3	276	2	272	39	*	153
23	Northern AZ U.	171	30	75	*	8	3	1	41



	A	B	C	D	E
1	State	Institution	Institution Type	Field	Number of Research Facilities
2	Alabama	AL A&M U.	Public	All	104
3	Alabama	AL A&M U.	Public	Agricultural and Natu	70
4	Alabama	AL A&M U.	Public	Biological and Biome	7
5	Alabama	AL A&M U.	Public	Computer and Inform	1
6	Alabama	AL A&M U.	Public	Engineering	20
7	Alabama	AL A&M U.	Public	Health and Clinical Sc	0
8	Alabama	AL A&M U.	Public	Mathematics and Sta	1
9	Alabama	AL A&M U.	Public	Physical Sciences	5
10	Alabama	AL A&M U.	Public	Psychology	0
11	Alabama	AL A&M U.	Public	Social Sciences	0
12	Alabama	AL A&M U.	Public	Other	0

3. Dates

Dates in excel may seem straight forward, however Tableau might have trouble understanding what they are. If you are using a date or time as a part of your data, edit the cell so that Tableau can read it.

- Right click cell → format cells → category → Date → chose date type

4. Transferring to Tableau Public

Once your data is formatted correctly in excel, transferring it to Tableau public should be easy.

- Save your Excel workbook, and open Tableau Public.
- Follow the prompts to transfer data.
- If it looks like tableau public is not reading your data correctly try using Tableau’s data interpreter.