Friends Don't Let Friends Struggle with Tableau: The One with Easy Naming Conventions

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I recently wrote about how some people often have the urge to verify data in Data Visualizations, and some steps we take to keep governance and help people trust the data. Despite that – people (finance... 👀) – are still going to want to check. And for those folks, there are other things we can do in Tableau that speed up the process of checking complex calculations.

We create QA sheets as a way to internally test our calculations that also allow the inheritor of the dashboard to validate however they see fit.

Tableau lets us create pretty cool nested calculations, even from levels of detail that are not in the view [AKA LOD (Level Of Detail) Calculations]. We have written some incredibly complicated formulas that always deliver the right answer but are hard for someone to dissect, whether in Tableau, or, hopefully not, Excel.

The first thing to do when troubleshooting a complex calculation is to break it apart into smaller pieces and test each piece along the way. This process can be complicated and confusing as fields and calculations will often have very similar names. Tableau puts an = sign next to any calculation but I like to go one step further.

I group all calculations using numbers as a naming convention – that makes it far easier for me (and others) to read and process the calcs.

For example, instead of naming three calculations like the below:
- SUM PROFIT
- SUM SALES
- PROFIT RATIO

I instead name them:
- (_001) SUM PROFIT
- (_002) SUM SALES
- (_003) PROFIT RATIO (_001)(_002)

When looking at what field is used in a view, I can quickly reference the number of the calculation (001), versus having to read it to make sure it is the correct one, as typically there will be many calcs with similar names.

The other benefit to this naming convention is if I decide that I need to make a change to calc (_002), for example, I can type that into the search bar and not only will (_002) come up, but so will (_003) as the right hand side of the naming convention shows the calcs that are nested inside.

After 15+ years building Data Visualizations, I know that it is far easier and faster to find all calcs relevant to, say, SUM SALES when I look it up by a number (002) versus reading fields.

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