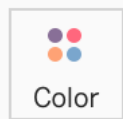


# Build your first visual

## Data Superstore

- 1 Create a new Worksheet – Right click in one of the sheet names and select "New Worksheet"
- 2 Create a new Calculated Field – Use the drop-down icon in the Data panel ①
- 3 Rename to "Sales Tax Free"
- 4 Drag the column Sales to the calculation field or type Sales (and select from the drop-down suggestions)
- 5 Multiply by 0.7 – assuming the tax is 30% then this way we obtain the price without tax
- 6 Drag to columns "Sales Tax Free" and to rows "Product → Sub-Category" ②
- 7 Make sure you have the viz horizontal bar charts selected ③
- 8 On the plot, mouse-over near subcategories, click on the symbol appears and select "Field → Sum(Sales Tax Free)" ④
- 9 Extra(if you have time) Drag column "Sales Tax Free" to Marks on top of icon

Color  
1



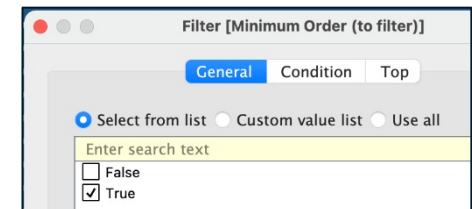
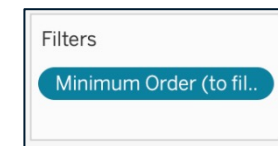
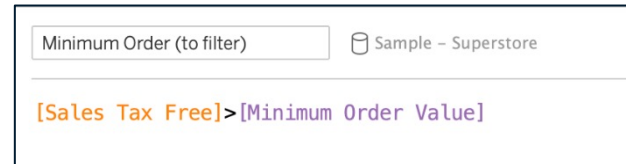
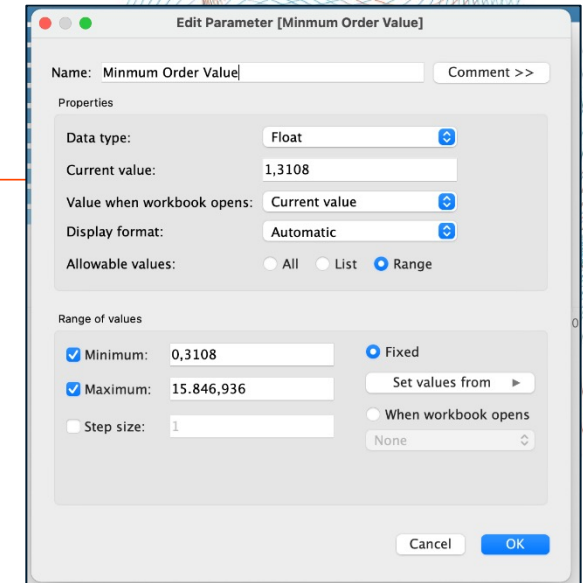
The screenshot illustrates the steps to create a calculated field and a visualization in Tableau:

- Step 1:** The 'Data' panel shows the 'Sample - Superstore' data source selected. A search bar is visible.
- Step 2:** The 'Columns' shelf contains the calculated field 'SUM(Sales Tax Free)'. The 'Rows' shelf contains the dimension 'Sub-Category'.
- Step 3:** The 'Show Me' view is displayed, showing a horizontal bar chart. A red box highlights the 'Field' button in the top right corner of the view.
- Step 4:** A context menu is open over the 'Field' button, showing the following options: 'Data source order', 'Alphabetic', 'Field' (selected), and 'Nested'. The 'Field' option is highlighted with a blue bar.

# Build a parameter and filter

## Data Superstore

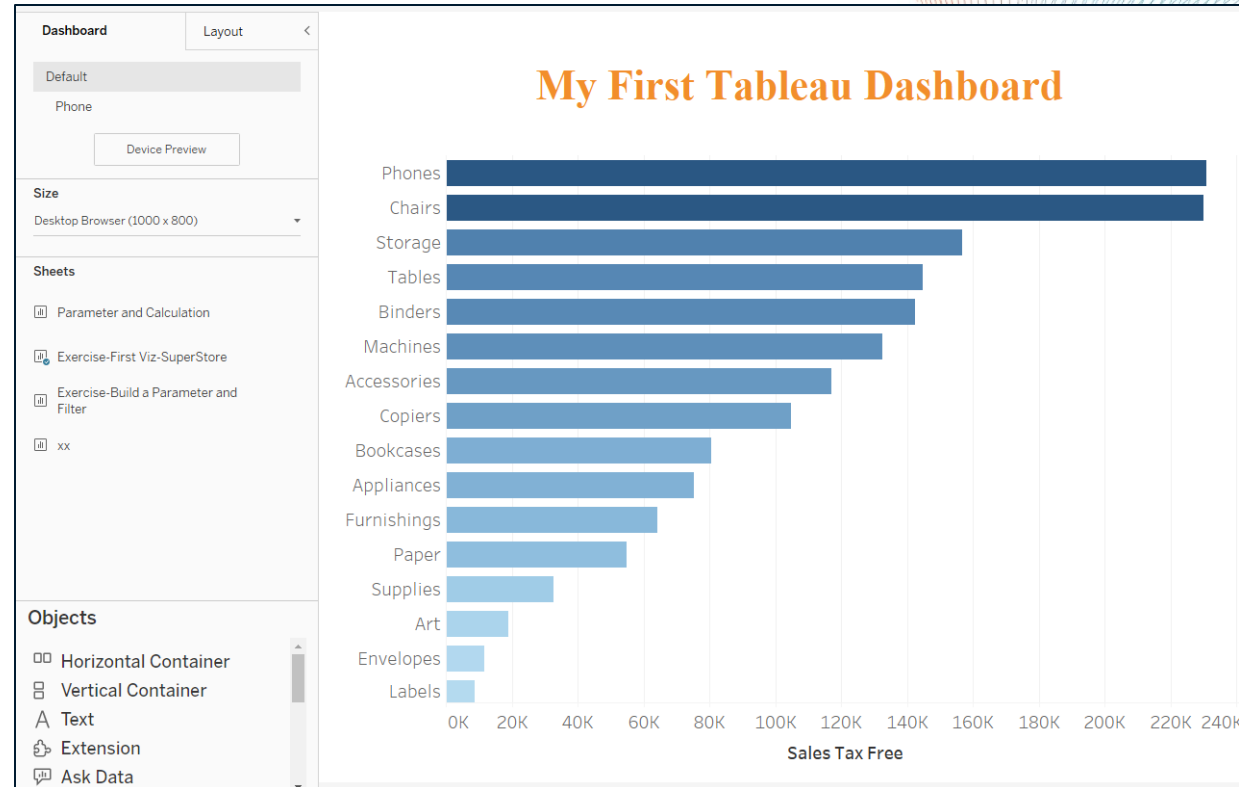
- 1 Duplicate the worksheet from the previous exercise
- 2 Create a new Parameter Field – Use the drop-down icon in the Data panel
- 3 Rename to "Minimum Order Value"
- 4 Select Range, then "Set values from" and choose the field "Sales Tax Free" 1
- 5 Change Display format to "Number (custom)", remove decimal cases and use thousands as display units
- 6 Create a calculation field to use as filter and name it as "Minimum Order (to filter)"
- 7 For the formula in the calculation field say that you want to filter Sales that are higher than Minimum Order Value 2  
[Sales Tax Free]>[Minimum Order Value]
- 8 Drag the calculated field "Minimum Order (to filter)" to the Filters 3  
(configure to keep only true values)
- 9 Change the values in the parameter and observe as the plot changes



# Build your first Dashboard

## Data Superstore

- 1 Create a new Dashboard
- 2 Keep the **Tiled** option on
- 3 Drag one **Vertical** container to the canvas
- 4 Drag a **Text** field to the Vertical container – *Give a title*
- 5 Drag one **Horizontal** container to the lower part of the canvas
- 6 To the left of the Horizontal container drag the Chart of the first exercise
- 7 Customize your Dashboard



# Try to build this visual on your own

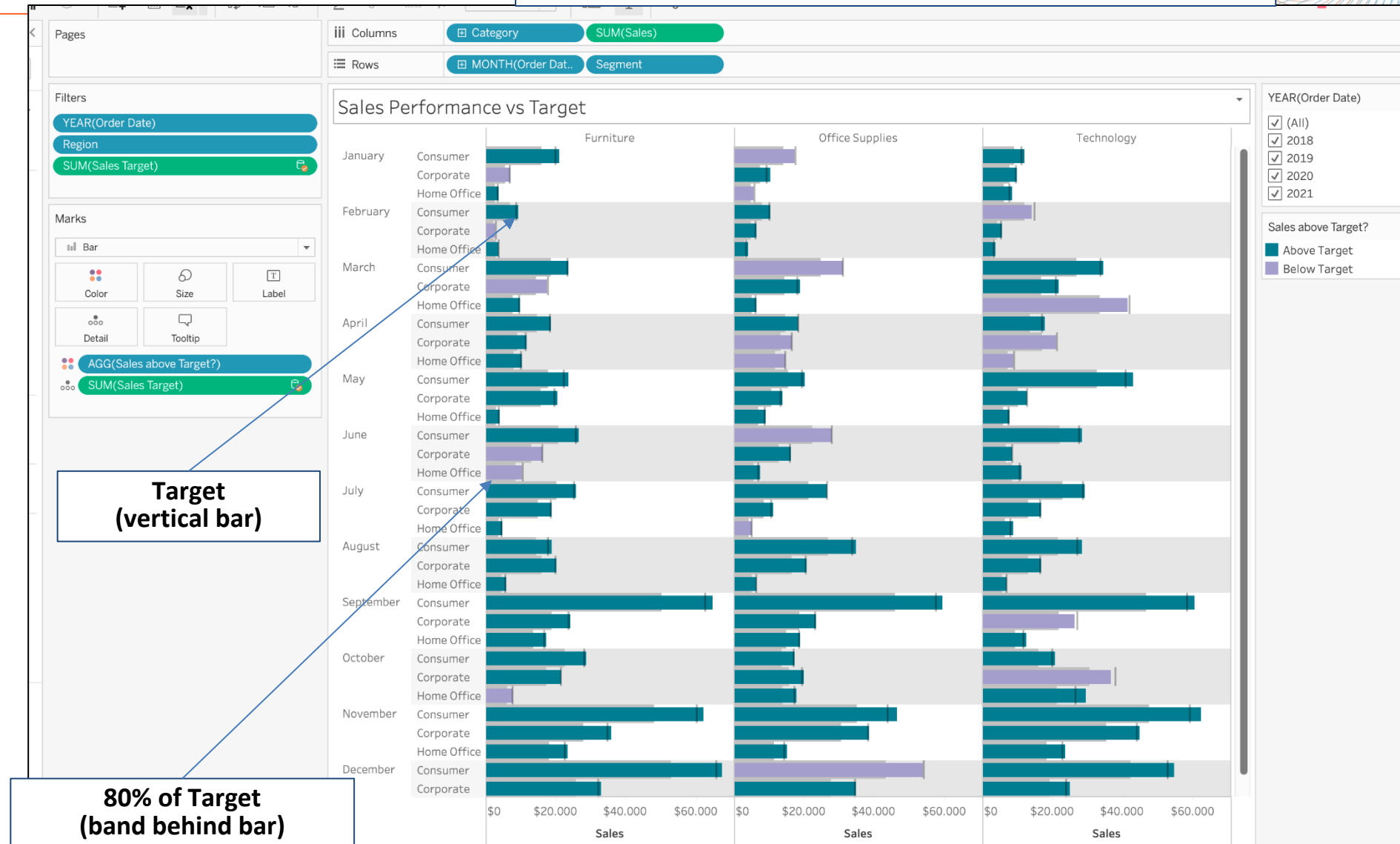
"Above Target" -> Total Sales higher than Target

SampleStore Dataset

Sales Target (US) Dataset

## Tips

- 1 Sales above Target is in dataset – "Sales Target (US)"
- 2 Category, Sales, Segment and Order date is in dataset – "Sample – Superstore"
- 3 This is an horizontal bar chart
- 4 Reference Lines can be added by *right-click* on top of x axis





## Exercise: Dynamic Dimension

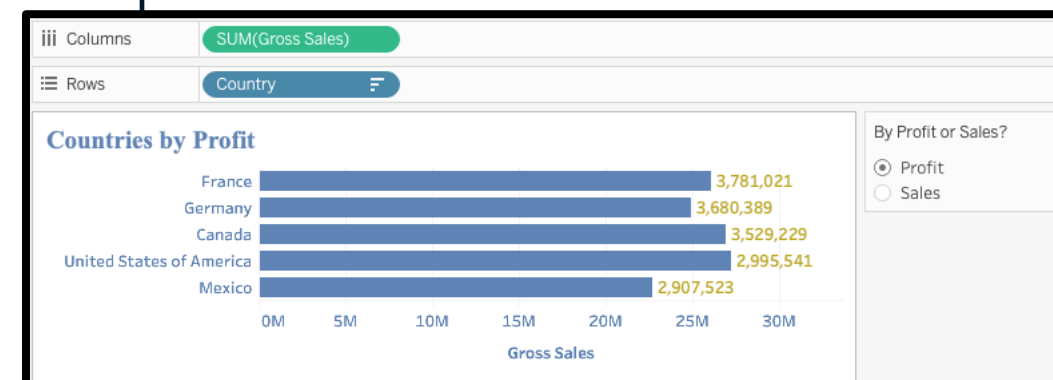
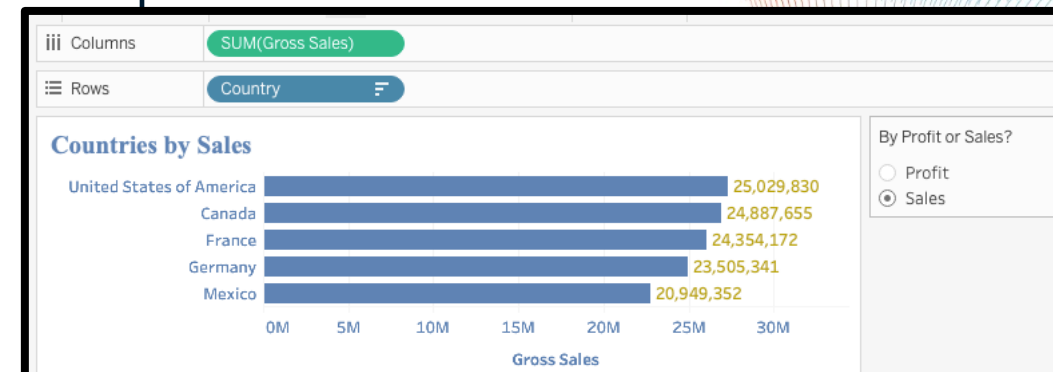
### 15min

- 1 Create a new Worksheet – Right click in one of the sheet names and select "New Worksheet"
- 2 Load data from excel document "Financial Sample"
- 3 Build a visual that has a bar chart with Countries and Gross Sales (SUM)
- 4 Create a Parameter to select "Profit" or "Sales"
- 5 Change the title of your visual to "Countries Sorted by <Your Parameter>"
- 6 Configure dynamic Sorting by Ordering Country Name based on highest sum of total "Profit" or "Sales" (from highest to lowest)
- 7 Add to Label the value of the selected metric to order your visual
- 8 Format your visual to look better

By Profit or Sales?

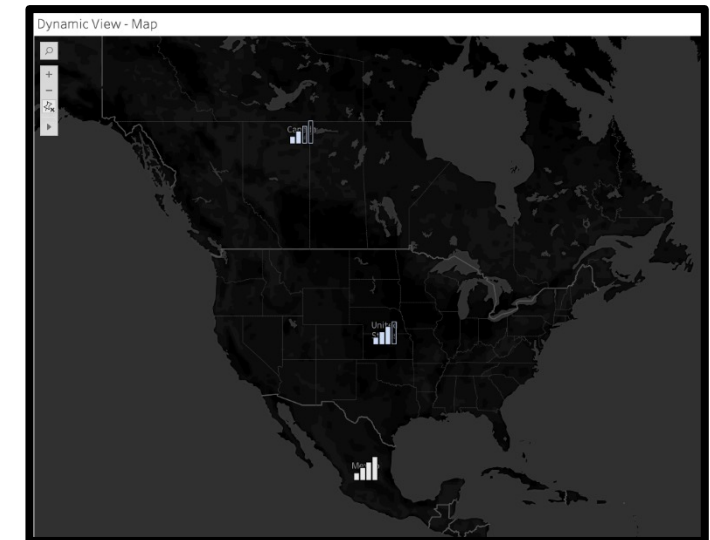
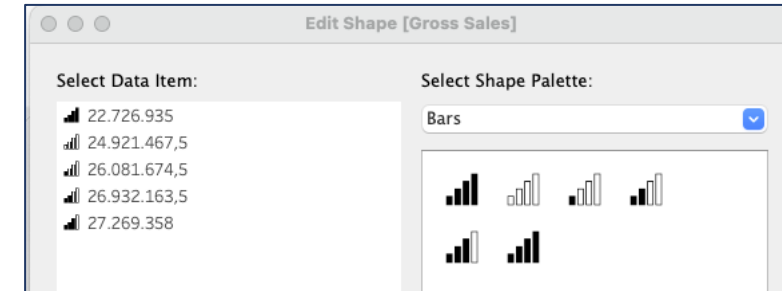
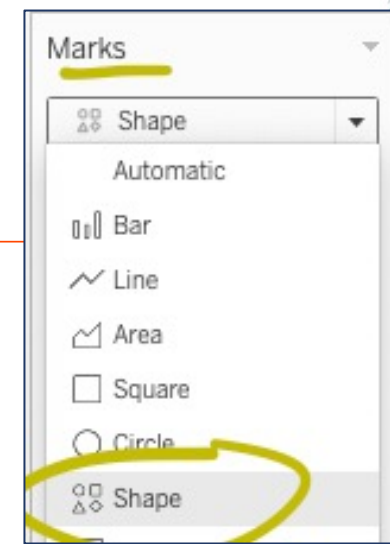
☒ Profit

☐ Sales



## Exercise: Dynamic View 15min

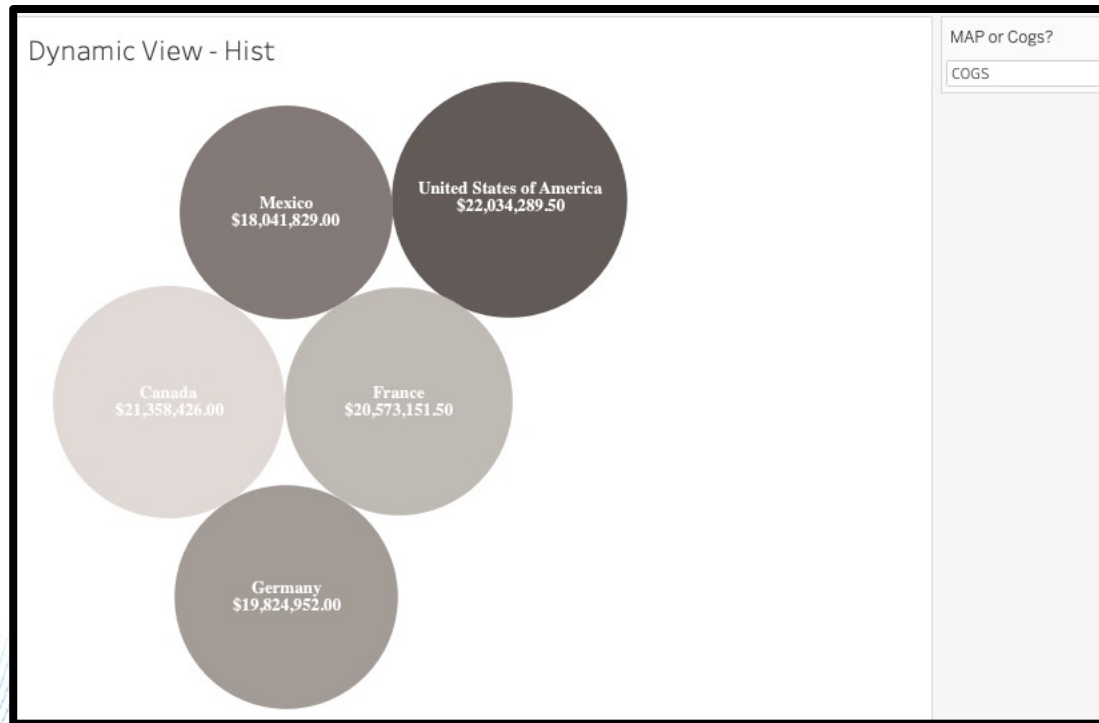
- 1 Create a new Worksheet – *Right click in one of the sheet names and select "New Worksheet"*
- 2 Name your worksheet "Dynamic View – Map"
- 3 Create a Map for Country and customise it
  - 1 Add Sum(Gross Sales) as a marker to your map
  - 2 Change the market shape to Bars
  - 3 Adjust size of your marker
- 4 Make a filter to only **show the visualisation only when MAP** is selected from options
  - 1 MAP or COGs
- 5 Customise your visual



## Exercise: Dynamic View

### 15min

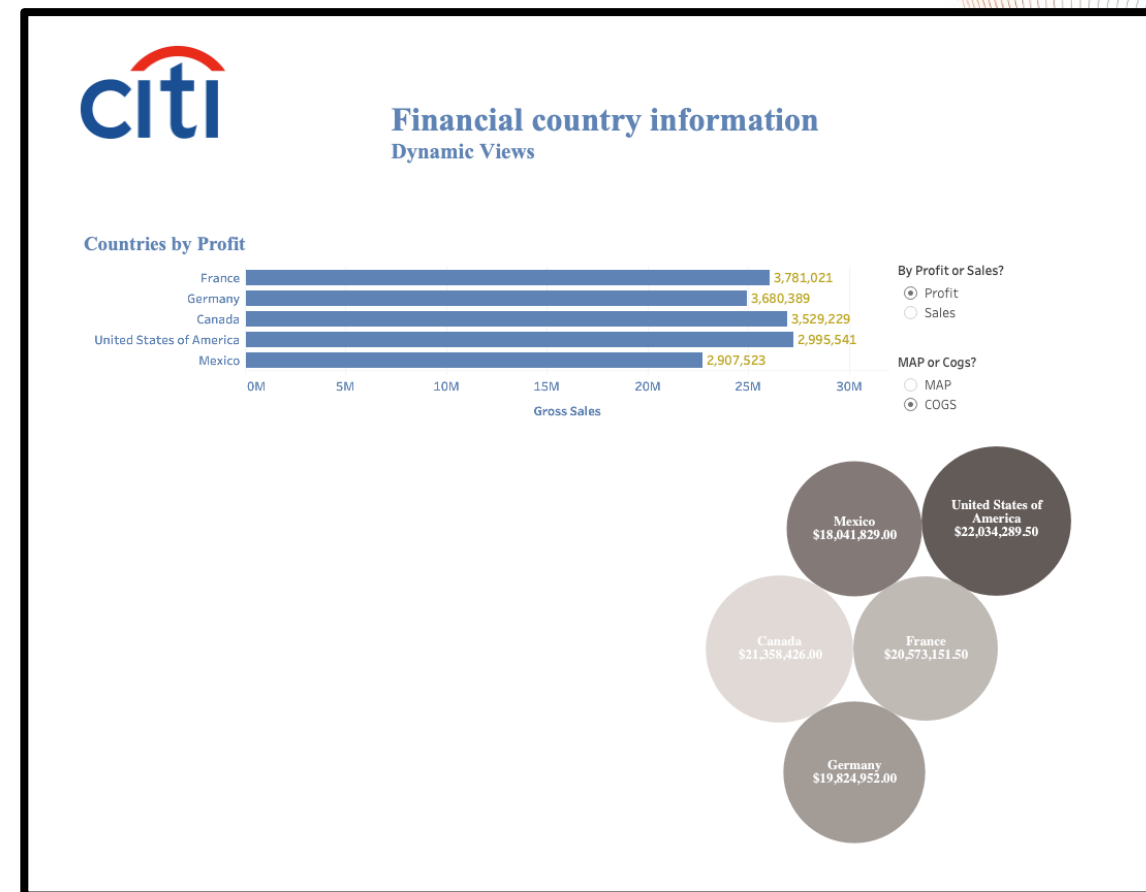
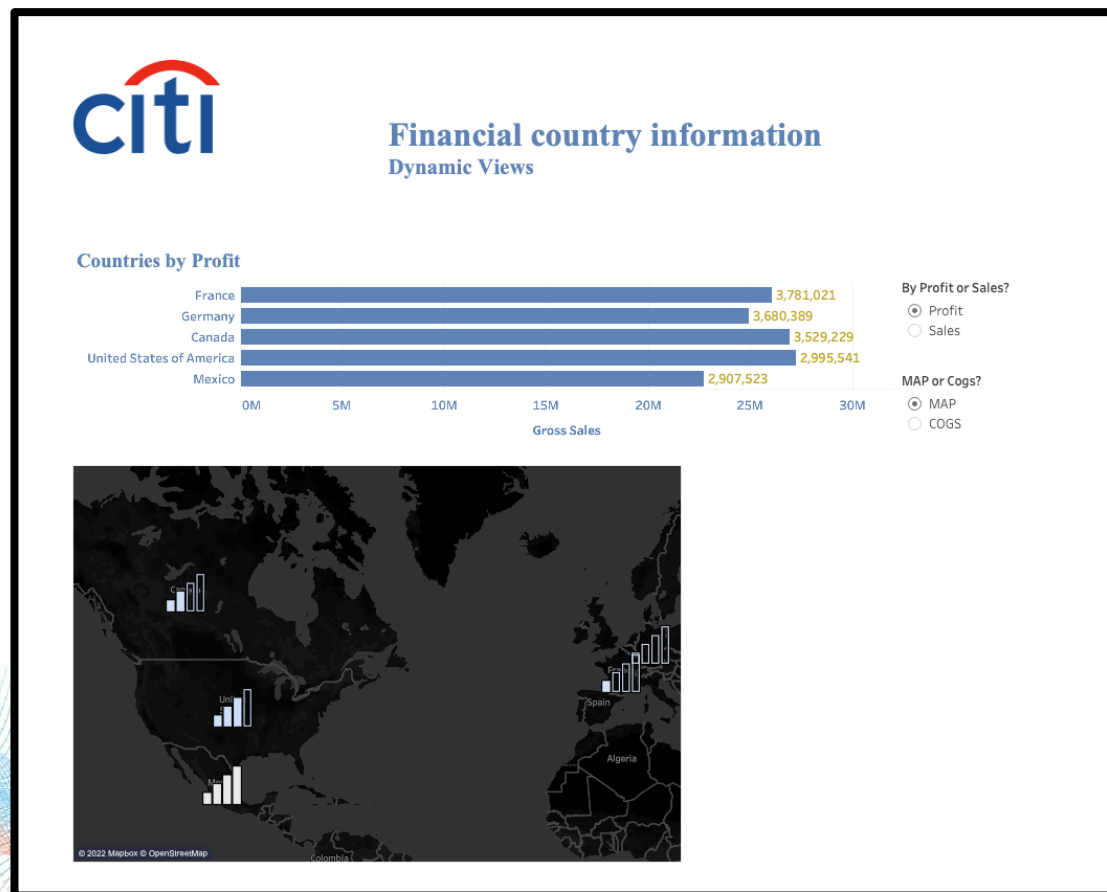
- 1 Same as the MAP but now to build the bubble viz below
- 2 Make sure to only **show the visualisation when COGS** is selected



# Exercise: Dashboard with Dynamic Dimension and Dynamic View

## 10min

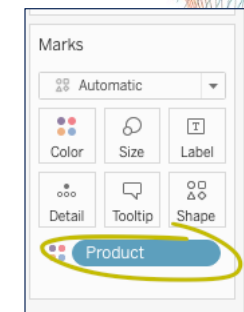
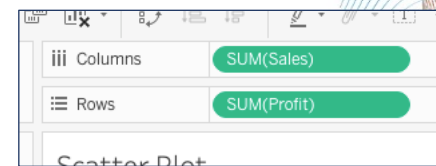
I Build the Dashboard and Story according to the images below



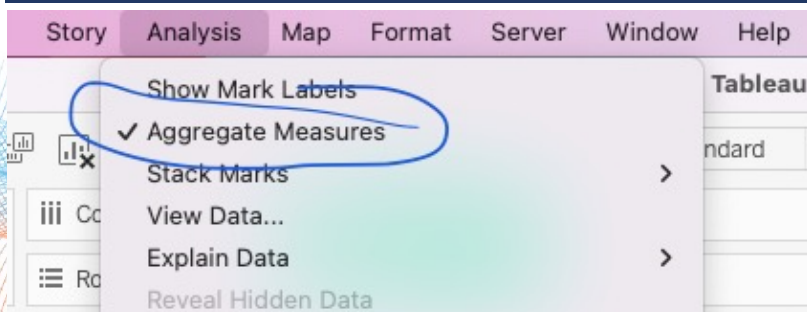


## Exercise: Scatter Plot + Analytics/Trend

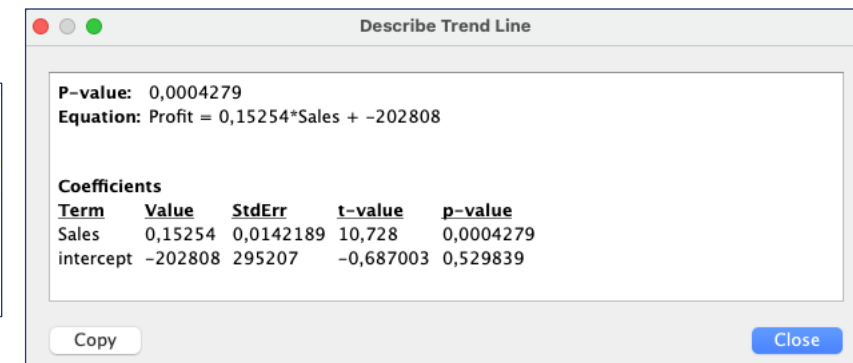
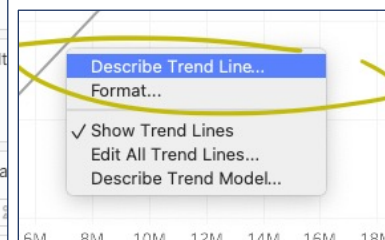
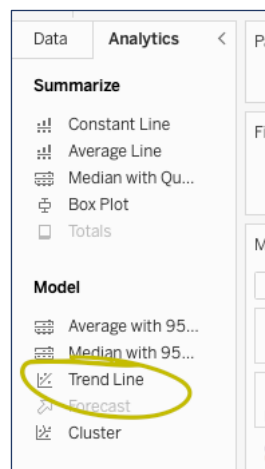
- 1 Create a new Worksheet – Right click in one of the sheet names and select "New Worksheet"
- 2 Data from "Financial Sample.xlsx"
- 3 Sum(Sales) in xx' axis and Sum(Profit) in yy' axis
- 4 Product will be used to see how Sales and Profit change together
- 5 If the visual is not a scatter plot, make sure to select it from "Show me" viz
- 6 Go to Analytics add a "Trend Line"
  - 1 Get to know the coefficients from your trend line



### REMOVE AGGREGATED MEASURES FOR SCATTER PLOT



9



## Exercise: Build and customise a Pie Chart

- 1 Create a new Worksheet – *Right click in one of the sheet names and select "New Worksheet"*
- 2 Pie chart with TOP 5 countries with higher "Total Assets Us B"
- 3 Edit Tooltip and customise it (see image)
- 4 Customise your pie

