

STEPS FOR CREATING A CROSSTAB OR TEXT TABLE

STEP 1: Drag and drop any dimension e.g.: **Ship Mode** to the **Rows** or **Columns** Shelf

The screenshot shows the Tableau interface with the following components:

- Pages**: A tab labeled "Columns".
- Columns Shelf**: A tab labeled "Columns".
- Rows Shelf**: A tab labeled "Rows" with a blue pill labeled "Ship Mode" on it.
- Filters**: A section on the left with a search bar.
- Marks**: A section on the left with a dropdown menu set to "Automatic" and buttons for "Color", "Size", "Text", "Detail", and "Tooltip".
- Crosstabs**: A section on the right showing a preview of the data as a crosstab table.

The **Crosstabs** preview shows the following data:

Ship Mode	
First Class	Abc
Same Day	Abc
Second Class	Abc
Standard Class	Abc

STEP 2: Drag and drop the 2nd dimension e.g.: **Category** to the **Rows** or **Columns** Shelf

Pages

Columns

Rows

Ship Mode

Category

Filters

Marks

Automatic

Color

Size

Text

Detail

Tooltip

Crosstabs

Ship Mode	Category	
First Class	Furniture	Abc
	Office Supplies	Abc
	Technology	Abc
Same Day	Furniture	Abc
	Office Supplies	Abc
	Technology	Abc
Second Class	Furniture	Abc
	Office Supplies	Abc
	Technology	Abc
Standard Class	Furniture	Abc
	Office Supplies	Abc
	Technology	Abc

STEP 3: Drag and drop any measure e.g.: **Sales** to the **Text** section of the **Marks** card or to the **View**

The screenshot displays the Tableau interface with a Crosstabs view. The Columns shelf contains 'Ship Mode' and 'Category'. The Rows shelf is empty. The Marks card is set to 'Text' and contains the measure 'SUM(Sales)'. The view shows a table of sales data categorized by Ship Mode and Category.

Ship Mode	Category	Sales
First Class	Furniture	\$111K
	Office Supplies	\$101K
	Technology	\$139K
Same Day	Furniture	\$39K
	Office Supplies	\$29K
	Technology	\$60K
Second Class	Furniture	\$156K
	Office Supplies	\$161K
	Technology	\$142K
Standard Class	Furniture	\$436K
	Office Supplies	\$428K
	Technology	\$494K

STEP 4: Drag and drop the 2nd measure e.g.: **Profit** to the **View**

The screenshot shows the Tableau interface with the following components:

- Pages**: Empty shelf.
- Columns**: Empty shelf.
- Rows**: Contains **Ship Mode** and **Category**.
- Filters**: Empty shelf.
- Marks**:
 - Card: Automatic
 - Buttons: Color, Size, Text
 - Buttons: Detail, Tooltip
 - Measure: **SUM(Sales)**
- View**: A Crosstabs table showing sales data.

Crosstabs Table:

Ship Mode	Category	
First Class	Furniture	\$111K
	Office Supplies	\$101K
	Technology	\$139K
Same Day	Furniture	\$29K
	Office Supplies	\$60K
	Technology	\$156K
Second Class	Furniture	\$161K
	Office Supplies	\$142K
	Technology	\$436K
Standard	Furniture	\$428K
	Office Supplies	\$494K
	Technology	

STEP 5: Ensure that both measures are present in crosstabs view

Once the 2nd measure is moved into the view Tableau will automatically place **Measure Names** in **Columns & Filter Shelf** and **Measure Values** in **Text Label**. A separate shelf called **Measure Values** will also appear.

The screenshot shows the Tableau interface with the following components:

- Columns Shelf:** Contains 'Measure Names'.
- Rows Shelf:** Contains 'Ship Mode' and 'Category'.
- Filters Shelf:** Contains 'Measure Names'.
- Marks Shelf:** Set to 'Automatic'.
- Measure Values Shelf:** Contains 'SUM(Profit)' and 'SUM(Sales)'.

The main view displays a crosstabs table with the following data:

Ship Mode	Category	Profit	Sales
First Class	Furniture	\$3K	\$111K
	Office Supplies	\$18K	\$101K
	Technology	\$28K	\$139K
Same Day	Furniture	\$1K	\$39K
	Office Supplies	\$6K	\$29K
	Technology	\$9K	\$60K
Second Class	Furniture	\$4K	\$156K
	Office Supplies	\$27K	\$161K
	Technology	\$26K	\$142K
Standard Class	Furniture	\$10K	\$436K
	Office Supplies	\$71K	\$428K
	Technology	\$83K	\$494K

STEP 6: Right-Click on the **Measure Names** in the Filter Shelf and select "**Edit Filter...**"

The screenshot shows the Tableau interface with the following components:

- Columns Shelf:** Measure Names
- Rows Shelf:** Ship Mode, Category
- Filters Shelf:** Measure Names (right-clicked to open the context menu)
- Marks Shelf:** Automatic
- Measure Values:** SUM(Profit), SUM(Sales)

The context menu for 'Measure Names' in the Filters shelf is open, showing the following options:

- Edit Filter... (highlighted)
- Show Measure Values Shelf
- Show Filter
- Show Highlighter
- Clear Filter
- Sort...
- Remove

The main view displays a Crosstabs table with the following data:

		Profit	Sales
		\$3K	\$111K
	plies	\$18K	\$101K
	gy	\$28K	\$139K
		\$1K	\$39K
	plies	\$6K	\$29K
	gy	\$9K	\$60K
		\$4K	\$156K
	plies	\$27K	\$161K
	Technology	\$26K	\$142K
Standard	Furniture	\$10K	\$436K
Class	Office Supplies	\$71K	\$428K
	Technology	\$83K	\$494K

STEP 7: Ensure that a new window "Filter [Measure Names]" is displayed

Filter [Measure Names] X

General

Enter search text

- ☐ Count of Orders
- ☐ Discount
- ☒ Profit
- ☐ Quantity
- ☒ Sales

All None

Summary

Field: [Measure Names]
Selection: Selected 2 of 5 values
Wildcard: All
Condition: None
Limit: None

Reset OK Cancel Apply

STEP 8: Select the additional Measure Names e.g.: **Discount** and **Quantity** and select OK

Filter [Measure Names] X

General

Enter search text

- ☐ Count of Orders
- ☒ Discount
- ☒ Profit
- ☒ Quantity
- ☒ Sales

All None

Summary

Field: [Measure Names]
Selection: Selected 4 of 5 values
Wildcard: All
Condition: None
Limit: None

Reset OK Cancel Apply

STEP 9: Ensure that the crosstabs now has the newly included measure names. It may be required to increase the size of the table to ensure that all column names are displayed fully.

Pages

Filters

Marks

Measure Values

iii Columns

Measure Names

Rows

Ship Mode

Category

Crosstabs

Ship Mode	Category	Discount	Profit	Quantity	Sales
First Class	Furniture	59	\$3K	1,238	\$111K
	Office Supplies	154	\$18K	3,372	\$101K
	Technology	40	\$28K	1,083	\$139K
Same Day	Furniture	22	\$1K	453	\$39K
	Office Supplies	47	\$6K	1,147	\$29K
	Technology	14	\$9K	360	\$60K
Second Class	Furniture	74	\$4K	1,569	\$156K
	Office Supplies	149	\$27K	4,480	\$161K
	Technology	48	\$26K	1,374	\$142K
Standard Class	Furniture	214	\$10K	4,768	\$436K
	Office Supplies	598	\$71K	13,907	\$428K
	Technology	143	\$83K	4,122	\$494K

Automatic

Color

Size

Text

Detail

Tooltip

Measure Values

SUM(Discount)

SUM(Profit)

SUM(Quantity)

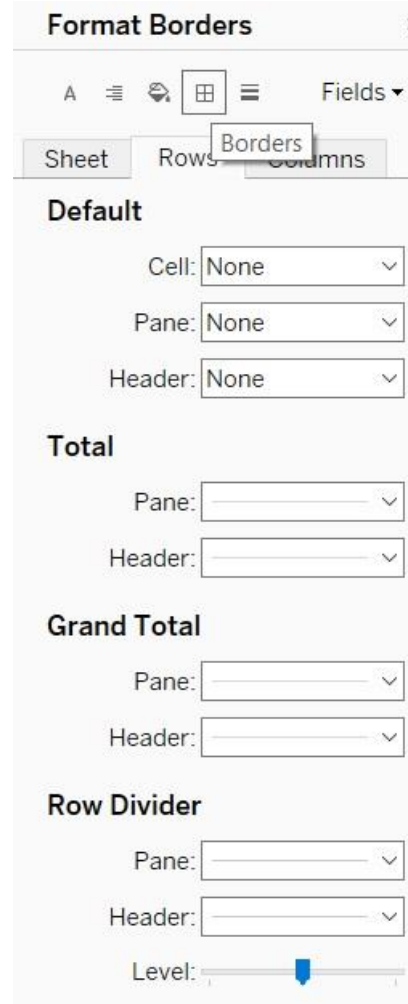
SUM(Sales)

STEP 10: Right-click on the Crosstabs and select “Format”.

The screenshot displays the Tableau interface with a Crosstabs table. The table has columns for Ship Mode, Category, Discount, Profit, Quantity, and Sales. The rows are categorized by Ship Mode (First Class, Same Day, Second Class, Standard Class) and Category (Furniture, Office Supplies, Technology). A right-click context menu is open over the table, with the 'Format...' option highlighted. The menu includes options like 'Select All', 'View Data...', 'Explain Data...', 'Format...', 'Clear Manual Sizing', 'Annotate', 'Trend Lines', 'Forecast', 'Drop Lines', 'Show View Toolbar', 'Keep Only', 'Exclude', 'Group', and 'Create Set...'. The left sidebar shows the 'Columns' shelf with 'Measure Names', the 'Rows' shelf with 'Ship Mode' and 'Category', and the 'Marks' shelf with 'Automatic'. The 'Measure Values' section lists 'SUM(Discount)', 'SUM(Profit)', 'SUM(Quantity)', and 'SUM(Sales)'.

Ship Mode	Category	Discount	Profit	Quantity	Sales
First Class	Furniture	59	\$3K	1,238	\$111K
	Office Supplies	154	\$18K	3,372	\$101K
	Technology	40	\$28K	1,083	\$139K
Same Day	Furniture	22	\$1K	453	\$39K
	Office Supplies	17	\$1K	1,118	\$29K
	Technology	17	\$1K	1,118	\$60K
Second Class	Furniture	17	\$1K	1,118	\$156K
	Office Supplies	17	\$1K	1,118	\$161K
	Technology	17	\$1K	1,118	\$142K
Standard Class	Furniture	17	\$1K	1,118	\$436K
	Office Supplies	17	\$1K	1,118	\$428K
	Technology	17	\$1K	1,118	\$494K

STEP 11: Under **Format Borders** click on **Borders** → **Rows**



The screenshot shows the 'Format Borders' dialog box with the 'Rows' tab selected. The 'Borders' icon in the top toolbar is highlighted with a tooltip. The dialog is organized into sections: 'Default', 'Total', 'Grand Total', and 'Row Divider'. Each section contains dropdown menus for 'Cell', 'Pane', and 'Header' settings. The 'Level' slider at the bottom is set to 1.

Format Borders [X]

A [Icons] Fields ▾

Sheet **Rows** Columns

Default

Cell: None ▾

Pane: None ▾

Header: None ▾

Total

Pane: ▾

Header: ▾

Grand Total

Pane: ▾

Header: ▾

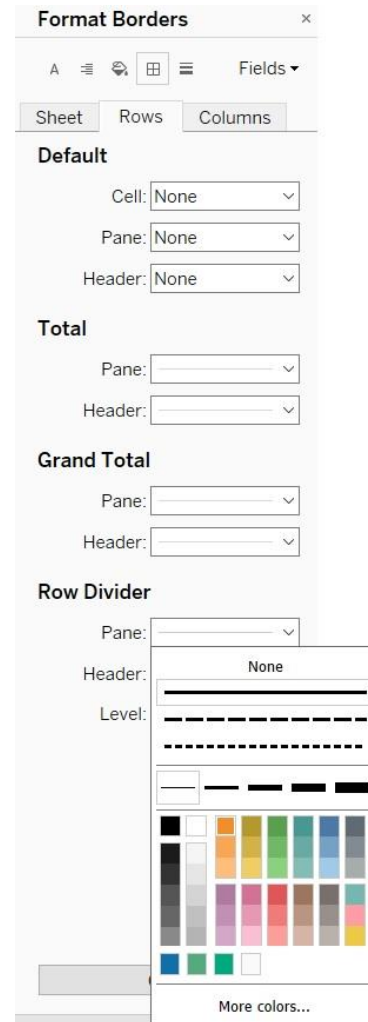
Row Divider

Pane: ▾

Header: ▾

Level: [Slider]

STEP 12: Change the color of the **Row Divider** to the required color



STEP 13: Ensure that the crosstabs now has the updated Row Divider color.

Format Borders

A

Fields

Sheet

Rows

Columns

Default

Cell: None

Pane: None

Header: None

Total

Pane:

Header:

Grand Total

Pane:

Header:

Row Divider

Pane:

Header:

Level:

Pages

Filters

Measure Names

Marks

Automatic

Color

Size

Text

Detail

Tooltip

Measure Values

SUM(Discount)

SUM(Profit)

SUM(Quantity)

SUM(Sales)

iii Columns

Measure Names

Rows

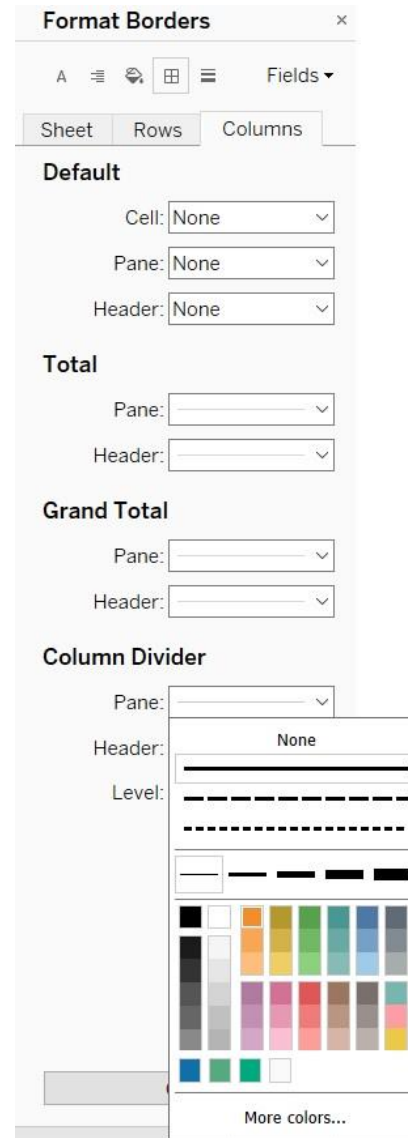
Ship Mode

Category

Crosstabs

Ship Mode	Category	Discount	Profit	Quantity	Sales
First Class	Furniture	59	\$3K	1,238	\$111K
	Office Supplies	154	\$18K	3,372	\$101K
	Technology	40	\$28K	1,083	\$139K
Same Day	Furniture	22	\$1K	453	\$39K
	Office Supplies	47	\$6K	1,147	\$29K
	Technology	14	\$9K	360	\$60K
Second Class	Furniture	74	\$4K	1,569	\$156K
	Office Supplies	149	\$27K	4,480	\$161K
	Technology	48	\$26K	1,374	\$142K
Standard Class	Furniture	214	\$10K	4,768	\$436K
	Office Supplies	598	\$71K	13,907	\$428K
	Technology	143	\$83K	4,122	\$494K

STEP 14: Similarly change the color of the **Column Divider** to the required color



STEP 15: Ensure that the crosstabs now has the updated **Column Divider** color.

Format Borders

A

Fields

Sheet

Rows

Columns

Default

Cell: None

Pane: None

Header: None

Total

Pane:

Header:

Grand Total

Pane:

Header:

Column Divider

Pane:

Header:

Level: 1

Pages

Filters

Measure Names

Marks

Automatic

Color

Size

Text

Detail

Tooltip

Measure Values

SUM(Discount)

SUM(Profit)

SUM(Quantity)

SUM(Sales)

Columns

Measure Names

Rows

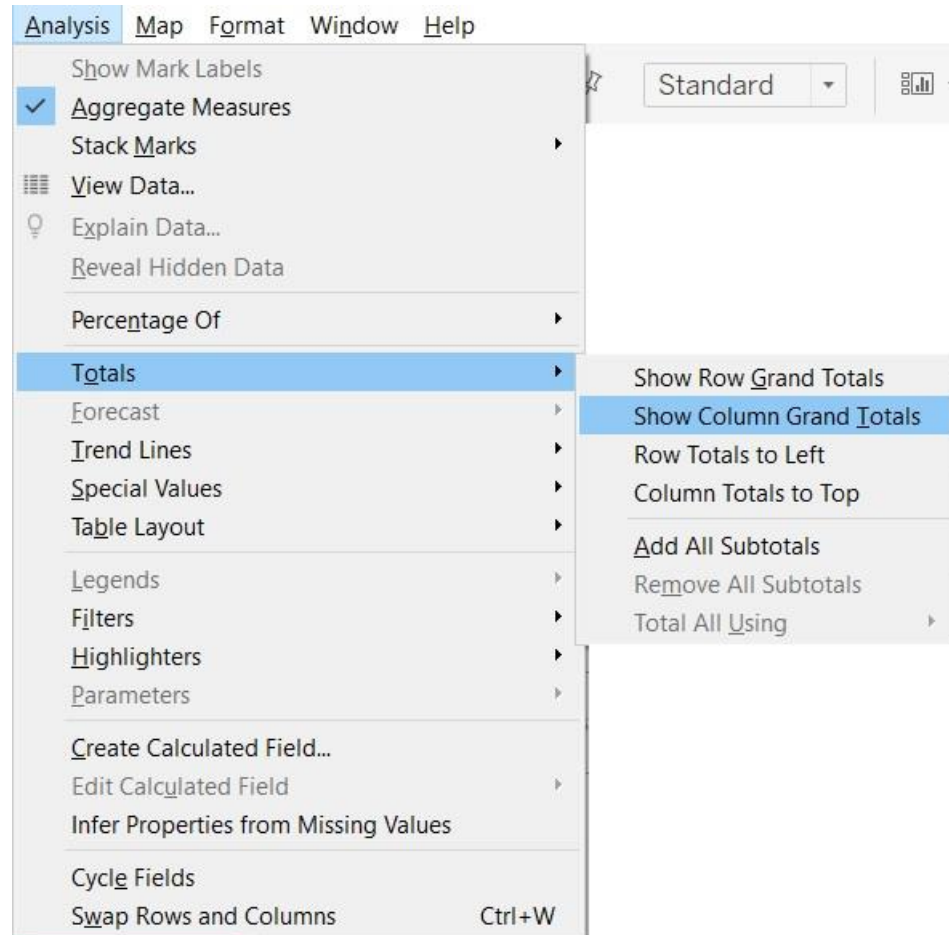
Ship Mode

Category

Crosstabs

Ship Mode	Category	Discount	Profit	Quantity	Sales
First Class	Furniture	59	\$3K	1,238	\$111K
	Office Supplies	154	\$18K	3,372	\$101K
	Technology	40	\$28K	1,083	\$139K
Same Day	Furniture	22	\$1K	453	\$39K
	Office Supplies	47	\$6K	1,147	\$29K
	Technology	14	\$9K	360	\$60K
Second Class	Furniture	74	\$4K	1,569	\$156K
	Office Supplies	149	\$27K	4,480	\$161K
	Technology	48	\$26K	1,374	\$142K
Standard Class	Furniture	214	\$10K	4,768	\$436K
	Office Supplies	598	\$71K	13,907	\$428K
	Technology	143	\$83K	4,122	\$494K

STEP 16: If it is required, we can add the column grand totals using **Analysis → Totals → Show Column Grand Totals**



STEP 17: Ensure that the **Grand Total** is now visible in the crosstabs

Pages

Filters

Marks

Measure Values

iii Columns

Measure Names

Rows

Ship Mode

Category

Crosstabs

Ship Mode	Category	Discount	Profit	Quantity	Sales
First Class	Furniture	59	\$3K	1,238	\$111K
	Office Supplies	154	\$18K	3,372	\$101K
	Technology	40	\$28K	1,083	\$139K
Same Day	Furniture	22	\$1K	453	\$39K
	Office Supplies	47	\$6K	1,147	\$29K
	Technology	14	\$9K	360	\$60K
Second Class	Furniture	74	\$4K	1,569	\$156K
	Office Supplies	149	\$27K	4,480	\$161K
	Technology	48	\$26K	1,374	\$142K
Standard Class	Furniture	214	\$10K	4,768	\$436K
	Office Supplies	598	\$71K	13,907	\$428K
	Technology	143	\$83K	4,122	\$494K
Grand Total		1,561	\$286K	37,873	\$2,297K

Automatic

Color

Size

Text

Detail

Tooltip

Measure Values

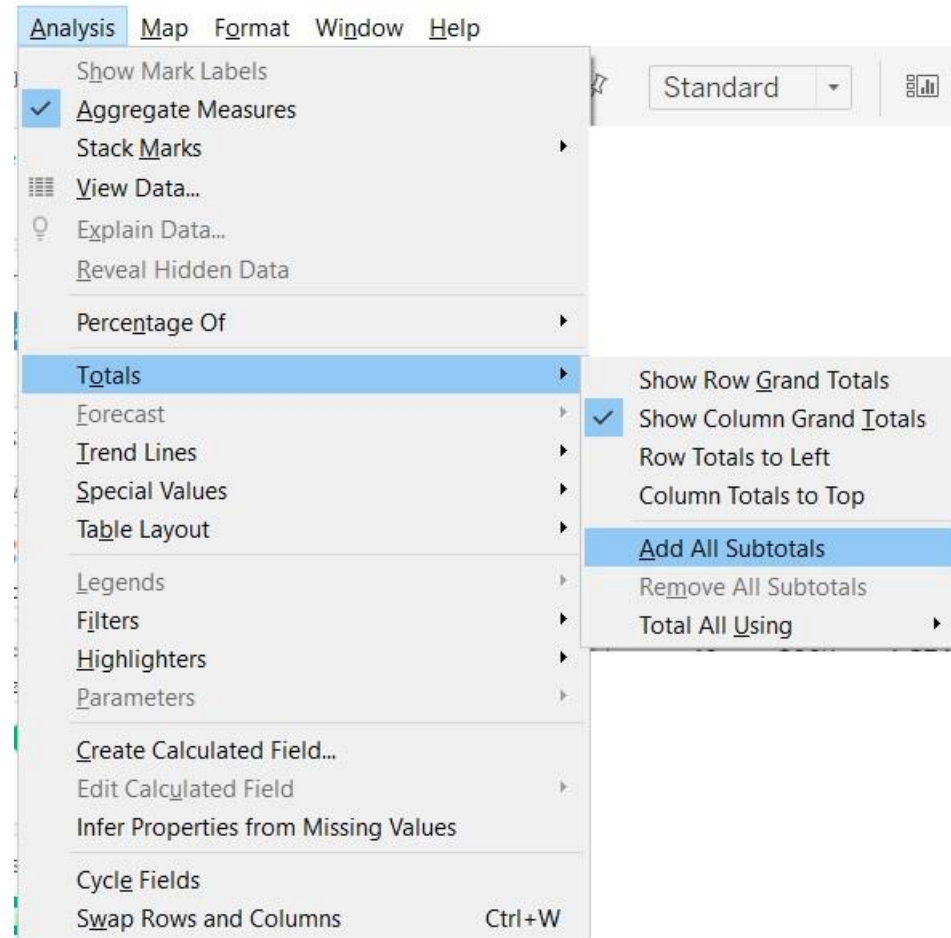
SUM(Discount)

SUM(Profit)

SUM(Quantity)

SUM(Sales)

STEP 18: If it is required, we can add all the Subtotals using **Analysis → Totals → Add All Subtotals**



STEP 19: Ensure that the **Sub Totals** are now visible in the crosstabs

Pages

Filters

Marks

Measure Values

iii Columns

Measure Names

Rows

Ship Mode

Category

Crosstabs

Ship Mode	Category	Discount	Profit	Quantity	Sales
First Class	Furniture	59	\$3K	1,238	\$111K
	Office Supplies	154	\$18K	3,372	\$101K
	Technology	40	\$28K	1,083	\$139K
	Total	253	\$49K	5,693	\$351K
Same Day	Furniture	22	\$1K	453	\$39K
	Office Supplies	47	\$6K	1,147	\$29K
	Technology	14	\$9K	360	\$60K
	Total	83	\$16K	1,960	\$128K
Second Class	Furniture	74	\$4K	1,569	\$156K
	Office Supplies	149	\$27K	4,480	\$161K
	Technology	48	\$26K	1,374	\$142K
	Total	270	\$57K	7,423	\$459K
Standard Class	Furniture	214	\$10K	4,768	\$436K
	Office Supplies	598	\$71K	13,907	\$428K
	Technology	143	\$83K	4,122	\$494K
	Total	955	\$164K	22,797	\$1,358K
Grand Total		1,561	\$286K	37,873	\$2,297K

Automatic

Color

Size

Text

Detail

Tooltip

Measure Values

SUM(Discount)

SUM(Profit)

SUM(Quantity)

SUM(Sales)

STEP 20: If required further formatting can be done by using the relevant options under **Format pane**

The screenshot displays the Tableau 'Format Shading' pane on the left and a 'Crosstabs' table on the right.

Format Shading Pane:

- Default:** Worksheet: [dropdown], Pane: [dropdown], Header: None [dropdown]
- Total:** Pane: [dropdown], Header: [dropdown]
- Grand Total:** Pane: [dropdown], Header: [dropdown]
- Row Banding:** Pane: None [dropdown], Header: None [dropdown], Band Size: [slider], Level: [dropdown]

Filters: Measure Names

Marks: Automatic [dropdown], Color, Size, Text, Detail, Tooltip

Measure Values: SUM(Discount), SUM(Profit), SUM(Quantity), SUM(Sales)

Crosstabs Table:

Ship Mode	Category	Discount	Profit	Quantity	Sales
First Class	Furniture	59	\$3K	1,238	\$111K
	Office Supplies	154	\$18K	3,372	\$101K
	Technology	40	\$28K	1,083	\$139K
	Total	253	\$49K	5,693	\$351K
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	Technology	14	\$9K	360	\$60K
	Total	83	\$16K	1,960	\$128K
Second Class	Furniture	74	\$4K	1,569	\$156K
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	Total	270	\$57K	7,423	\$459K
Standard Class	Furniture	214	\$10K	4,768	\$436K
	Office Supplies	598	\$71K	13,907	\$428K
	Technology	143	\$83K	4,122	\$494K
	Total	955	\$164K	22,797	\$1,358K
Grand Total		1,561	\$286K	37,873	\$2,297K

Steps 10 to 20 are meant only for additional formatting of crosstabs and are not limited to the mentioned options shown in the example.