

CREATING KPI CARDS IN TABLEAU

In Tableau there is no out-of-the-box visual for KPI Cards hence we need to create it manually.

Although there are multiple methods to create KPI Cards in Tableau we will go through only one method.

We will make use of the **Measure Values** and **Measure Names** Tableau Generated fields.

We will go through the detailed steps to create the KPI Cards.

CREATING KPI CARDS IN TABLEAU

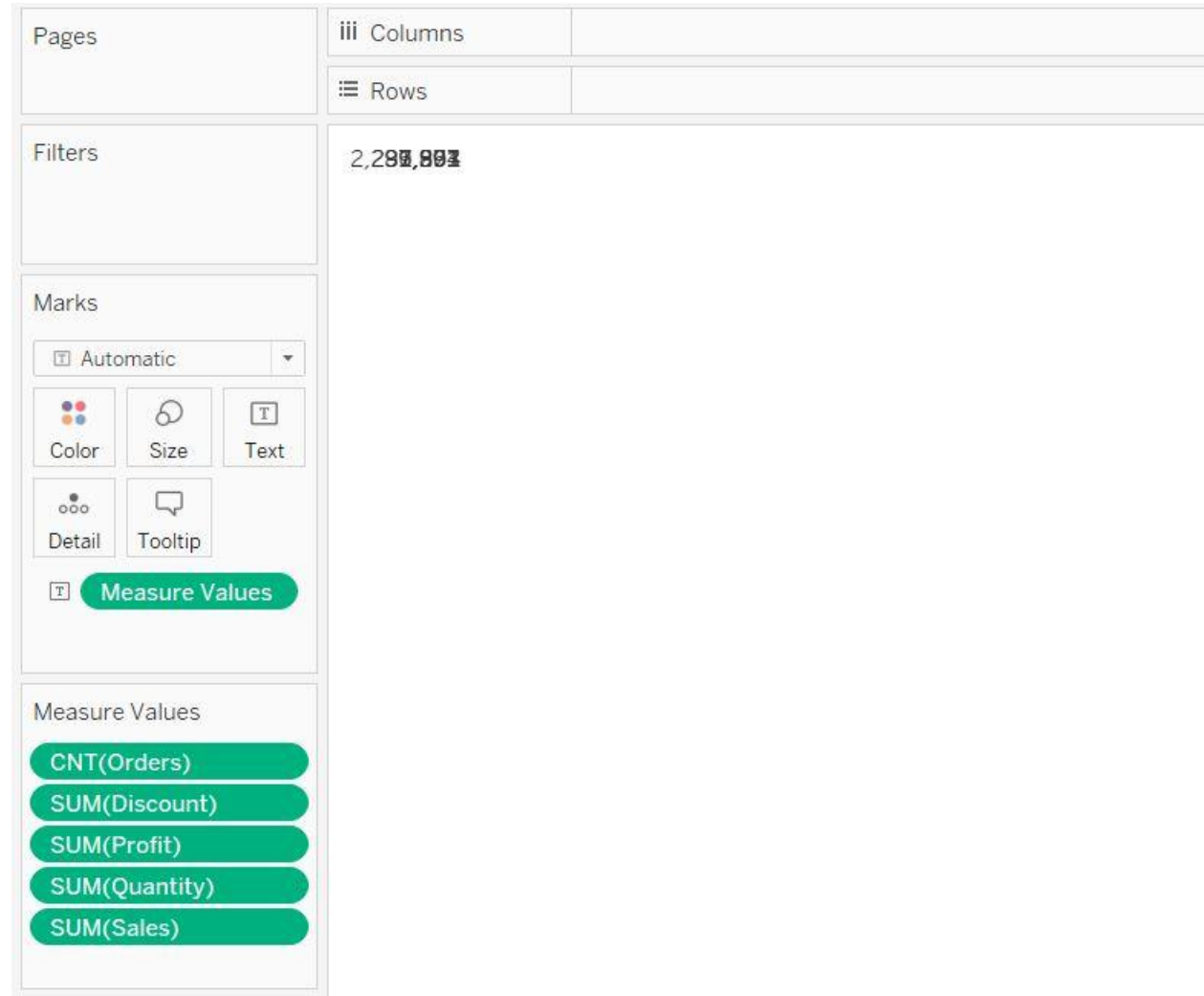
Drag and drop the **Measure Values** field on **Text** of **Marks** card

The screenshot displays the Tableau interface with the following components:

- Data Pane:** Shows a list of fields under 'Tables' and 'Measure Names'. The 'Measure Values' field is highlighted at the bottom.
- Columns and Rows Shelves:** Both are empty, with a 'Drop field here' prompt.
- Marks Card:** The 'Text' mark type is selected. A green callout bubble labeled 'Measure Values' is positioned over the 'Text' icon, indicating the field being dragged.
- Filters Shelf:** Empty, with a 'Drop field here' prompt.
- Detail and Tooltip Marks:** These marks are visible in the Marks card but are not currently being used.

CREATING KPI CARDS IN TABLEAU

This is the view after dropping **Measure Values** on **Text** of **Marks** card



CREATING KPI CARDS IN TABLEAU

Drag and drop the **Measure Names** field on **Columns** shelf

The screenshot displays the Tableau Desktop interface. On the left, the 'Data' pane shows a list of fields under 'Tables'. The 'Columns' shelf at the top contains the 'Measure Names' field. The 'Rows' shelf is empty. The 'Marks' card is set to 'Automatic'. The 'Measure Values' section on the left lists several measures: CNT(Orders), SUM(Discount), SUM(Profit), SUM(Quantity), and SUM(Sales). The main view area shows a single KPI card with the value '2,287,881'.

Data | Analytics | Pages | Columns: Measure Names | Rows: |

Search | Filters | Marks: Automatic | Color | Size | Text | Detail | Tooltip | Measure Values

Tables

- Category
- City
- Country/Region
- Customer ID
- Customer Name
- Order Date
- Order ID
- Postal Code
- Product ID
- Product Name
- Region
- Row ID
- Segment
- Ship Date
- Ship Mode
- State
- Sub-Category
- Measure Names
- Discount
- Profit
- Quantity
- Sales
- Latitude (generated)
- Longitude (generated)
- Orders (Count)
- Measure Values

2,287,881

CREATING KPI CARDS IN TABLEAU

This is the view after dropping **Measure Names** on **Columns** shelf

The screenshot shows the Tableau interface with the following components:

- Columns Shelf:** Contains the field **Measure Names**.
- Marks Shelf:** Contains the field **Measure Values**. The mark type is set to **Automatic**.
- Table View:** Displays a table with 5 columns: **Count of ..**, **Discount**, **Profit**, **Quantity**, and **Sales**. The data rows are:

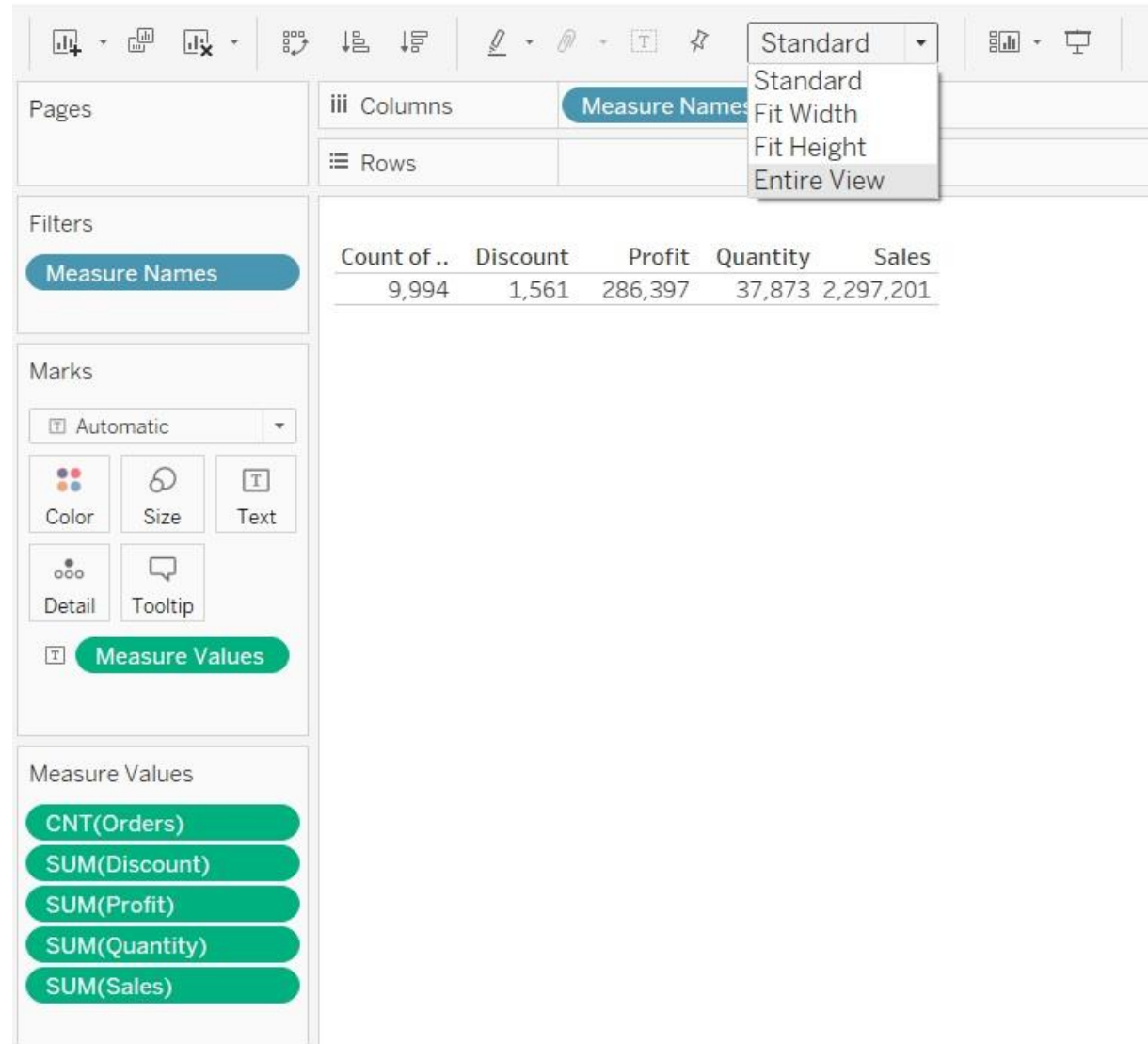
Count of ..	Discount	Profit	Quantity	Sales
9,994	1,561	286,397	37,873	2,297,201

Left Panel:

- Filters:** Contains **Measure Names**.
- Marks:** Includes options for Color, Size, Text, Detail, and Tooltip. The **Measure Values** field is currently selected.
- Measure Values:** A list of available measure values: **CNT(Orders)**, **SUM(Discount)**, **SUM(Profit)**, **SUM(Quantity)**, and **SUM(Sales)**.

CREATING KPI CARDS IN TABLEAU

From the drop-down select **Entire View**



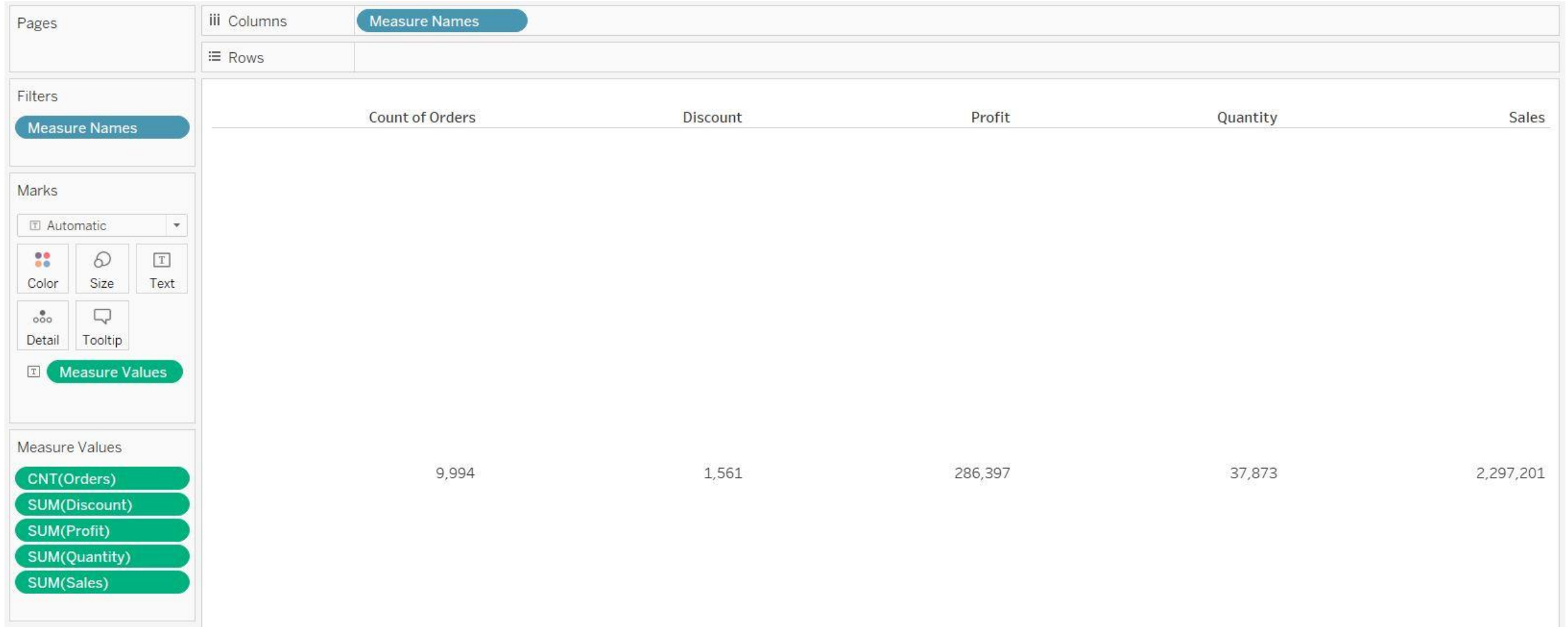
The screenshot shows the Tableau interface with the 'Measure Names' dropdown menu open. The menu options are: Standard, Standard, Fit Width, Fit Height, and Entire View. The 'Entire View' option is highlighted. The main view displays a table with the following data:

Count of ..	Discount	Profit	Quantity	Sales
9,994	1,561	286,397	37,873	2,297,201

The interface also shows the 'Columns' and 'Rows' shelves, the 'Filters' shelf with 'Measure Names', the 'Marks' shelf with 'Automatic', and the 'Measure Values' shelf with 'Measure Values'. The 'Measure Values' shelf also lists the following measures: CNT(Orders), SUM(Discount), SUM(Profit), SUM(Quantity), and SUM(Sales).

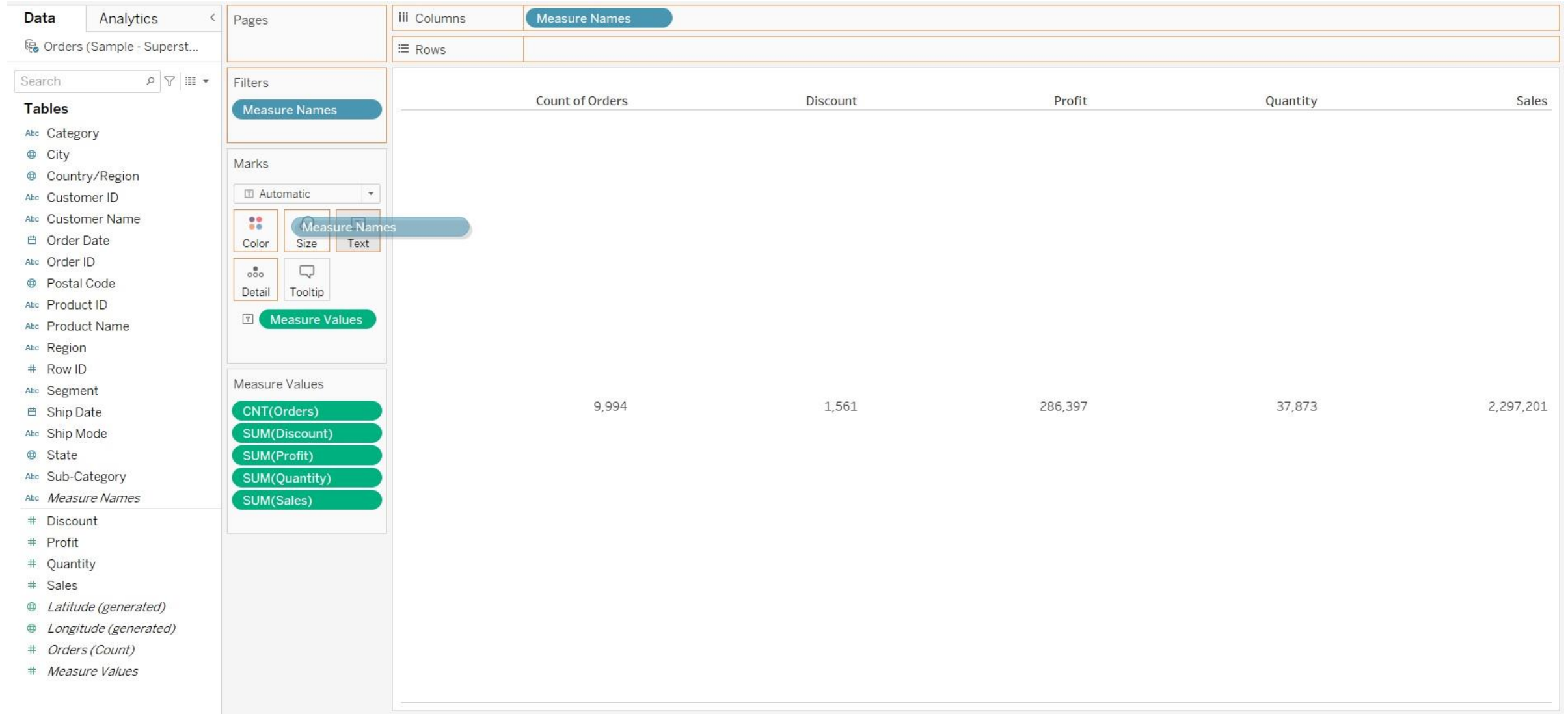
CREATING KPI CARDS IN TABLEAU

This is the view after selecting **Entire View**



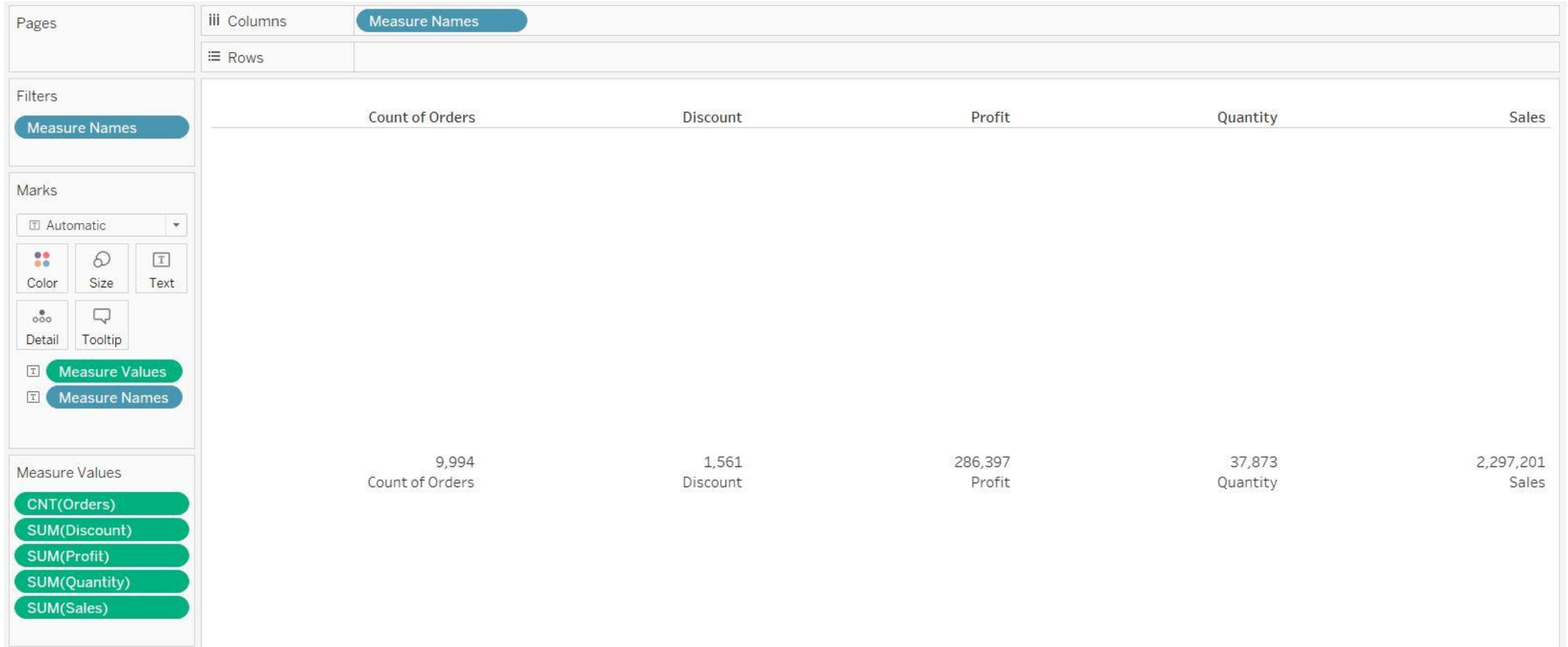
CREATING KPI CARDS IN TABLEAU

Drag and drop the **Measure Names** field on **Text** of **Marks** card



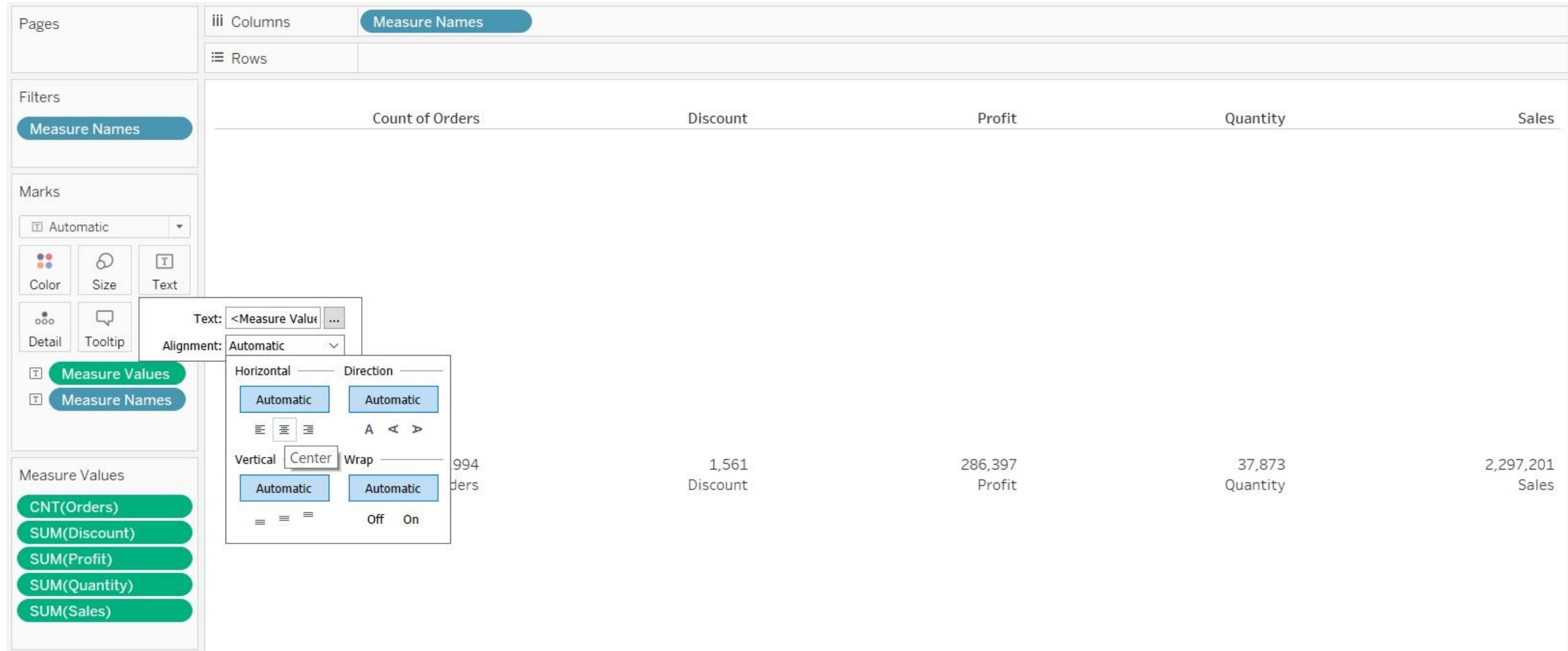
CREATING KPI CARDS IN TABLEAU

This is the view after dropping **Measure Names** on **Text** of **Marks** card



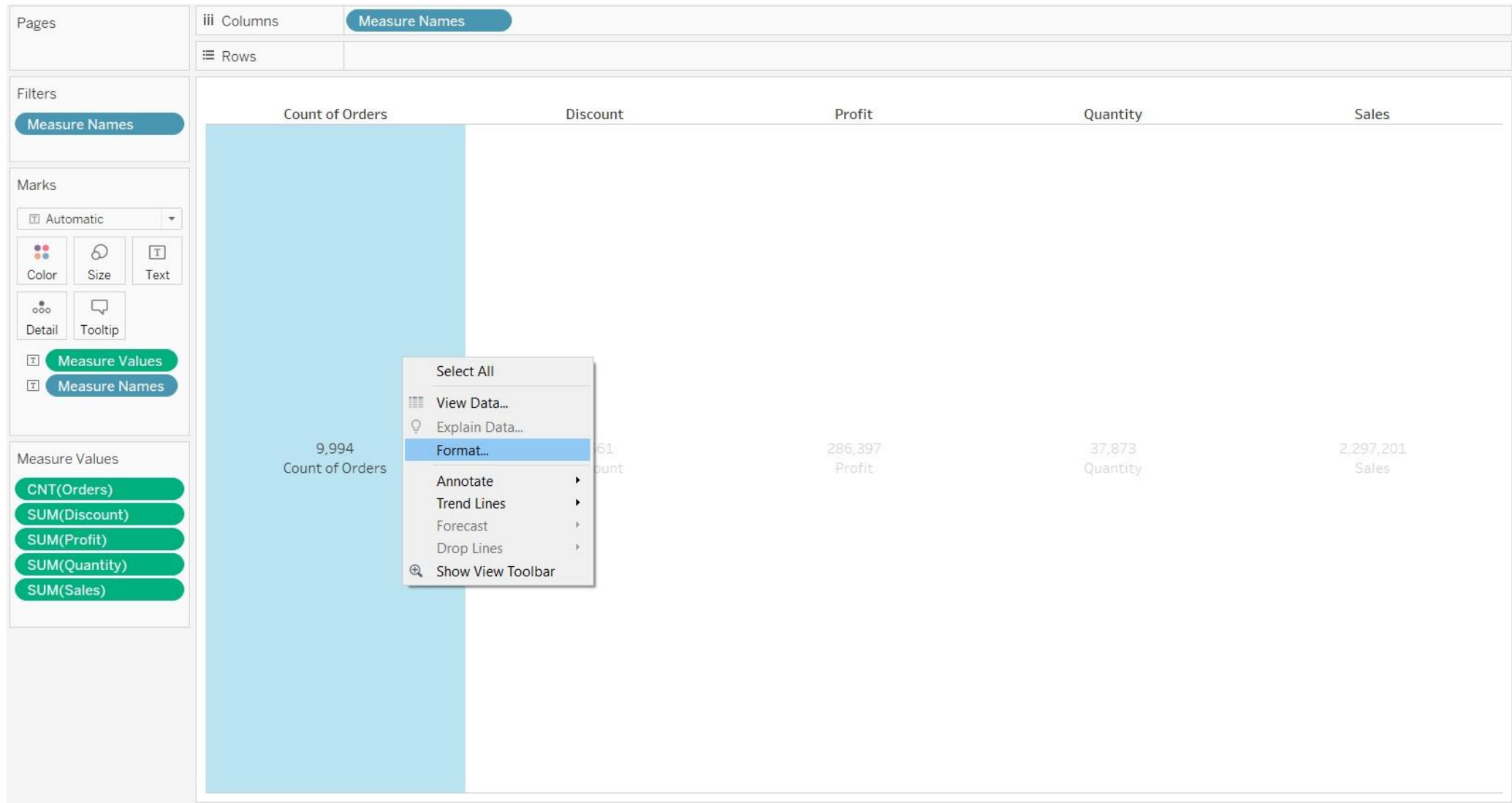
CREATING KPI CARDS IN TABLEAU

Click on **Text** of **Marks** card, In **Alignment**, under **Horizontal** select the **Center** option



CREATING KPI CARDS IN TABLEAU

In case the previous steps do not center align the Measure Values and Measure Names right-click on any one of the fields and select **Format**



CREATING KPI CARDS IN TABLEAU

In **Format Alignment**, Sheet > Default > Pane > Horizontal > Select **Center**

The screenshot shows the Tableau interface with the **Format Alignment** pane open. The **Default** tab is selected, and the **Pane** dropdown is set to **Horizontal**. The **Center** alignment option is highlighted. The main view displays a dashboard with five KPI cards: **Count of Orders** (9,994), **Discount** (1,561), **Profit** (286,397), **Quantity** (37,873), and **Sales** (2,297,201). The **Count of Orders** card is highlighted in blue.

Format Alignment Pane:

- Sheet: Rows, Columns
- Default: Pane: Center, Header: Automatic
- Total: Pane: Center, Header: Automatic
- Grand Total: Pane: Center, Header: Automatic

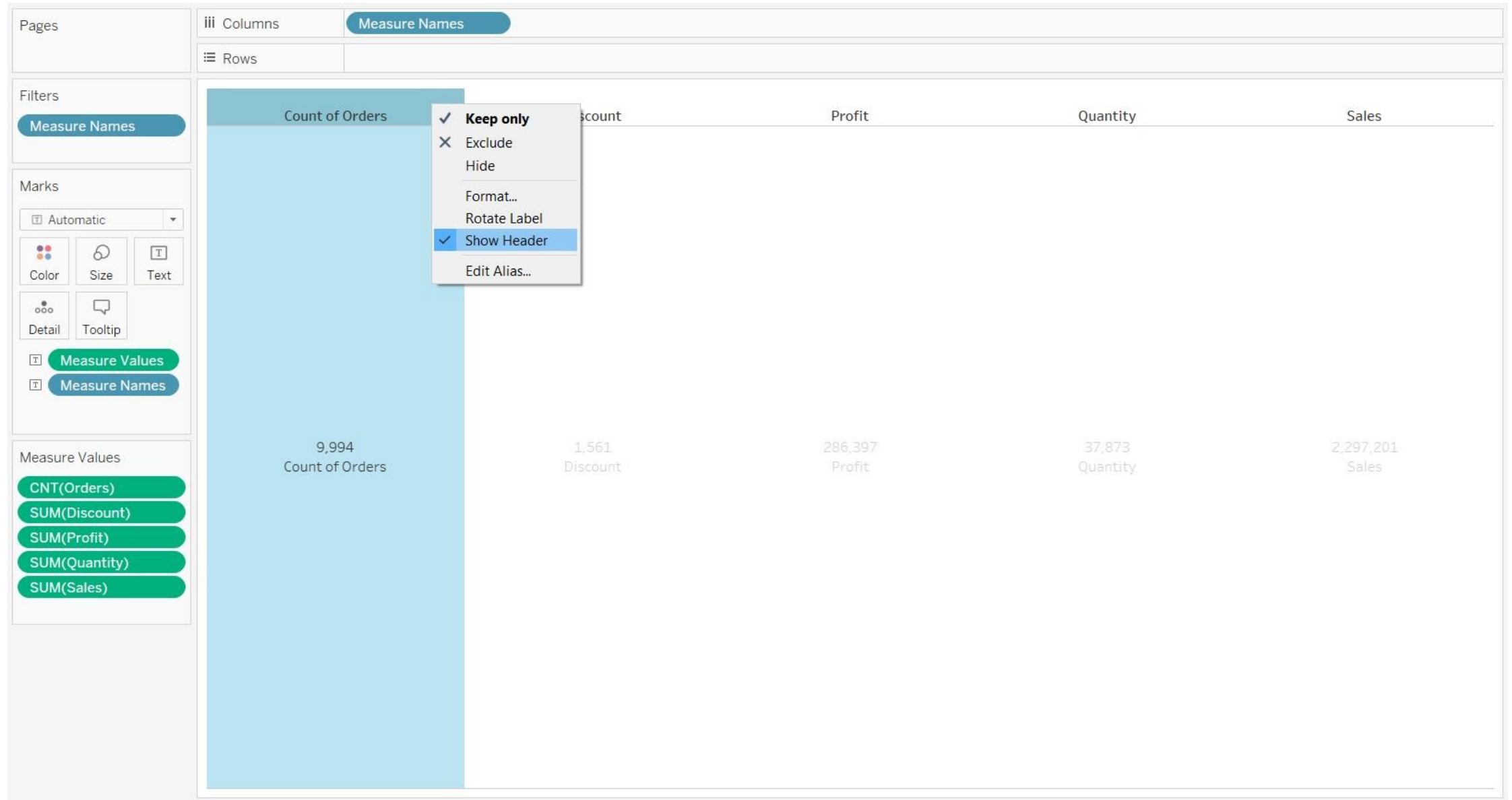
Measure Values List:

- CNT(Orders)
- SUM(Discount)
- SUM(Profit)
- SUM(Quantity)
- SUM(Sales)

Count of Orders	Discount	Profit	Quantity	Sales
9,994	1,561	286,397	37,873	2,297,201

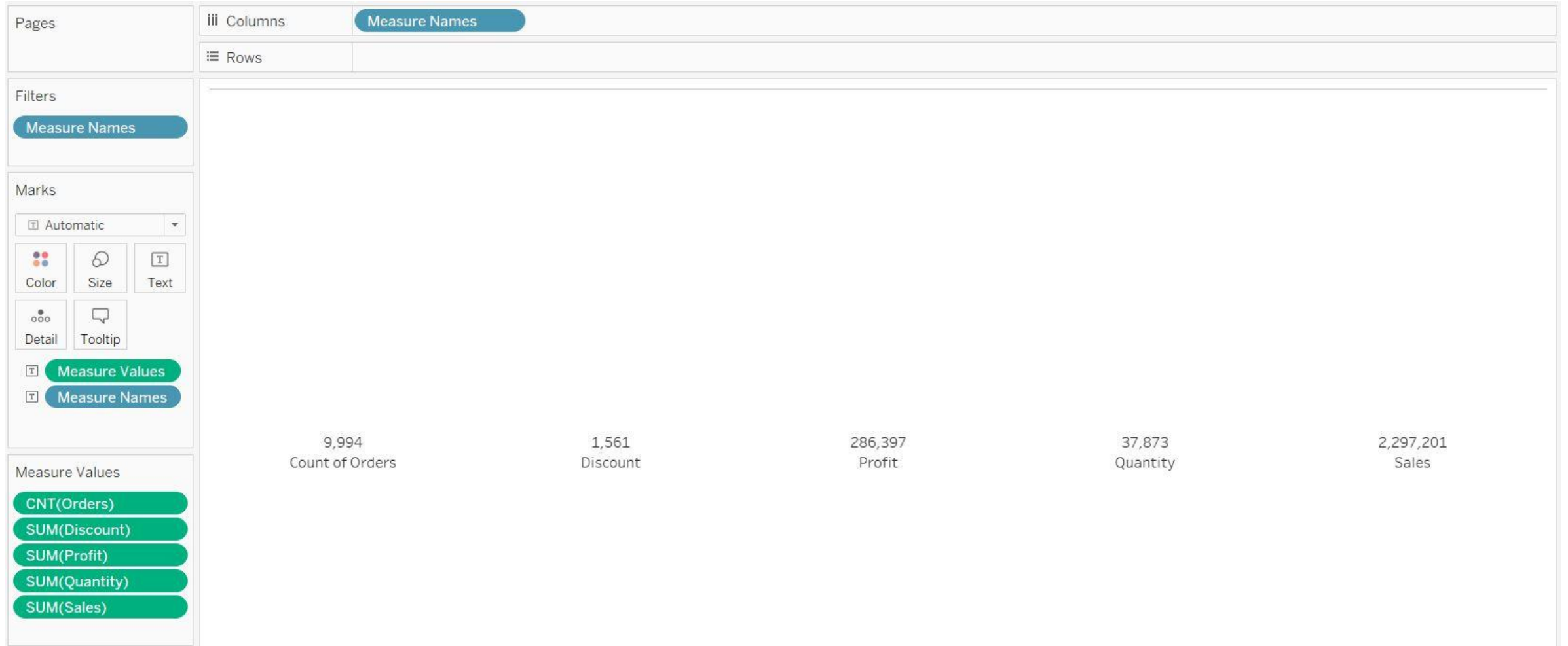
CREATING KPI CARDS IN TABLEAU

Right-click header, de-select **Show Header**



CREATING KPI CARDS IN TABLEAU

This is the view after removing **Header**



CREATING KPI CARDS IN TABLEAU

Click on **Text** of **Marks** card and click on the **3 dots (ellipsis)**

The screenshot shows the Tableau interface with the following components:

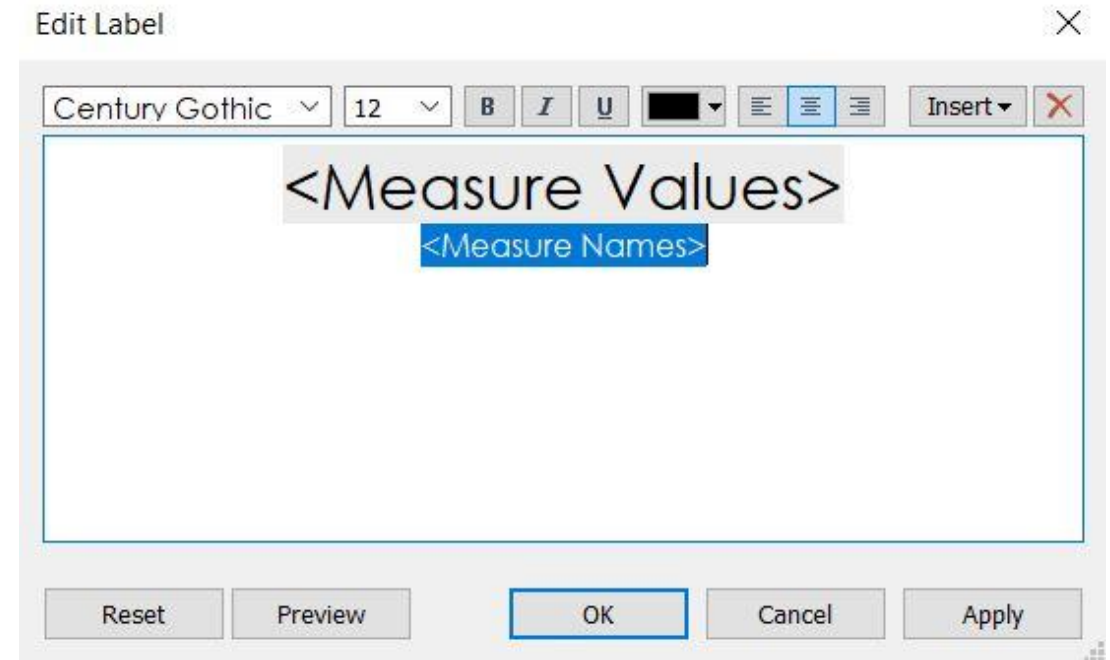
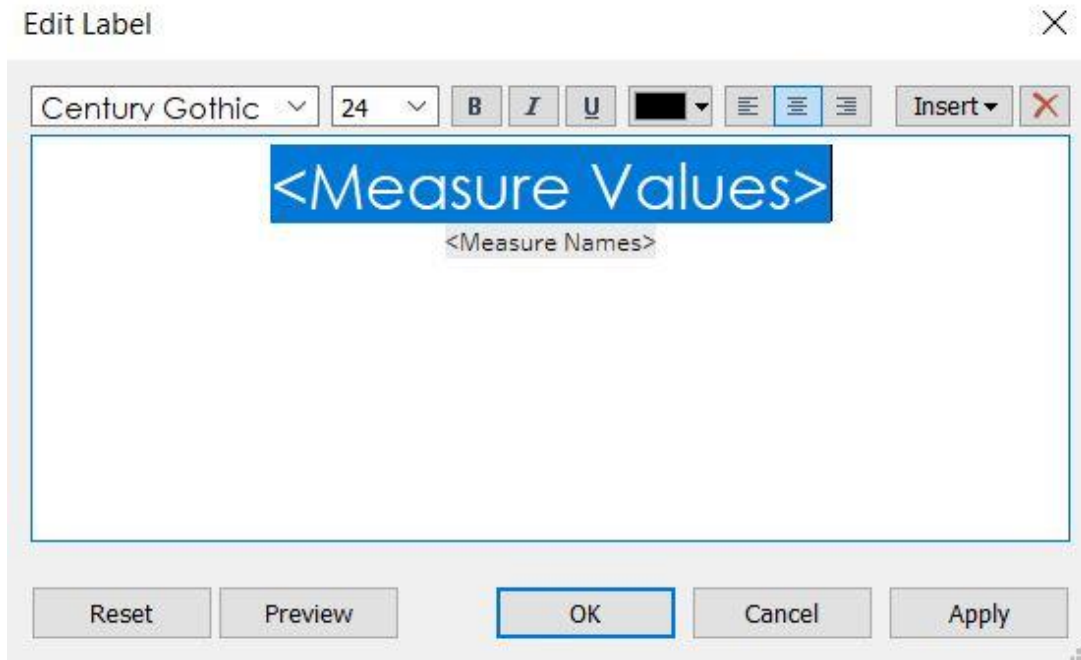
- Columns Shelf:** Contains a blue pill labeled "Measure Names".
- Rows Shelf:** Empty.
- Filters Shelf:** Contains a blue pill labeled "Measure Names".
- Marks Card:**
 - Dropdown menu: "Automatic".
 - Buttons: "Color", "Size", "Text" (selected), "Detail", "Tooltip".
 - Configuration panel for "Text":
 - Text: "<Measure Value" followed by a blue ellipsis button.
 - Alignment: "Center" (dropdown).
 - Measure Values shelf:
 - Blue pill: "Measure Values".
 - Blue pill: "Measure Names".
- Measure Values Shelf:** Contains five green pills: "CNT(Orders)", "SUM(Discount)", "SUM(Profit)", "SUM(Quantity)", and "SUM(Sales)".

The visualization area displays two KPI cards:

- Count of Orders:** Value 9,994.
- Discount:** Value 1,561.

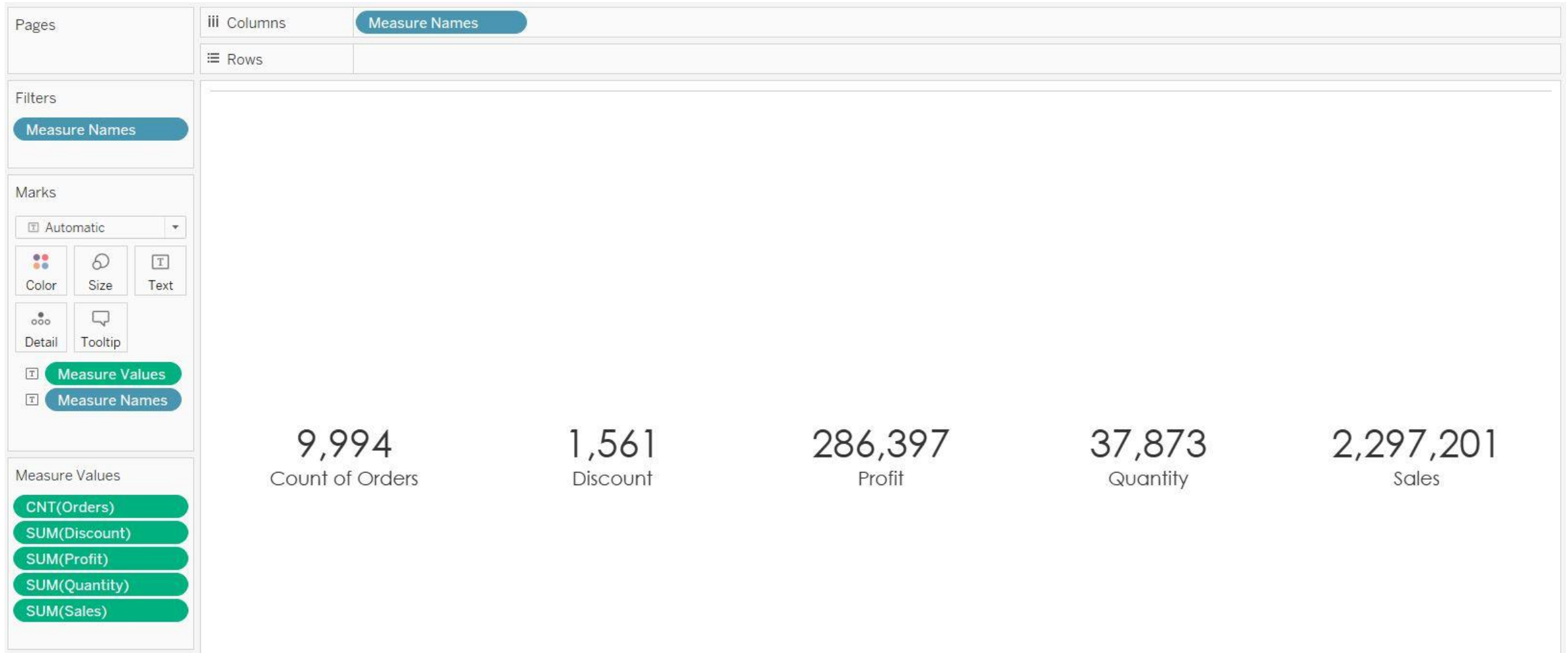
CREATING KPI CARDS IN TABLEAU

In the **Edit Label** dialog box select the required text and change the Font style and size from the drop-downs as per requirement



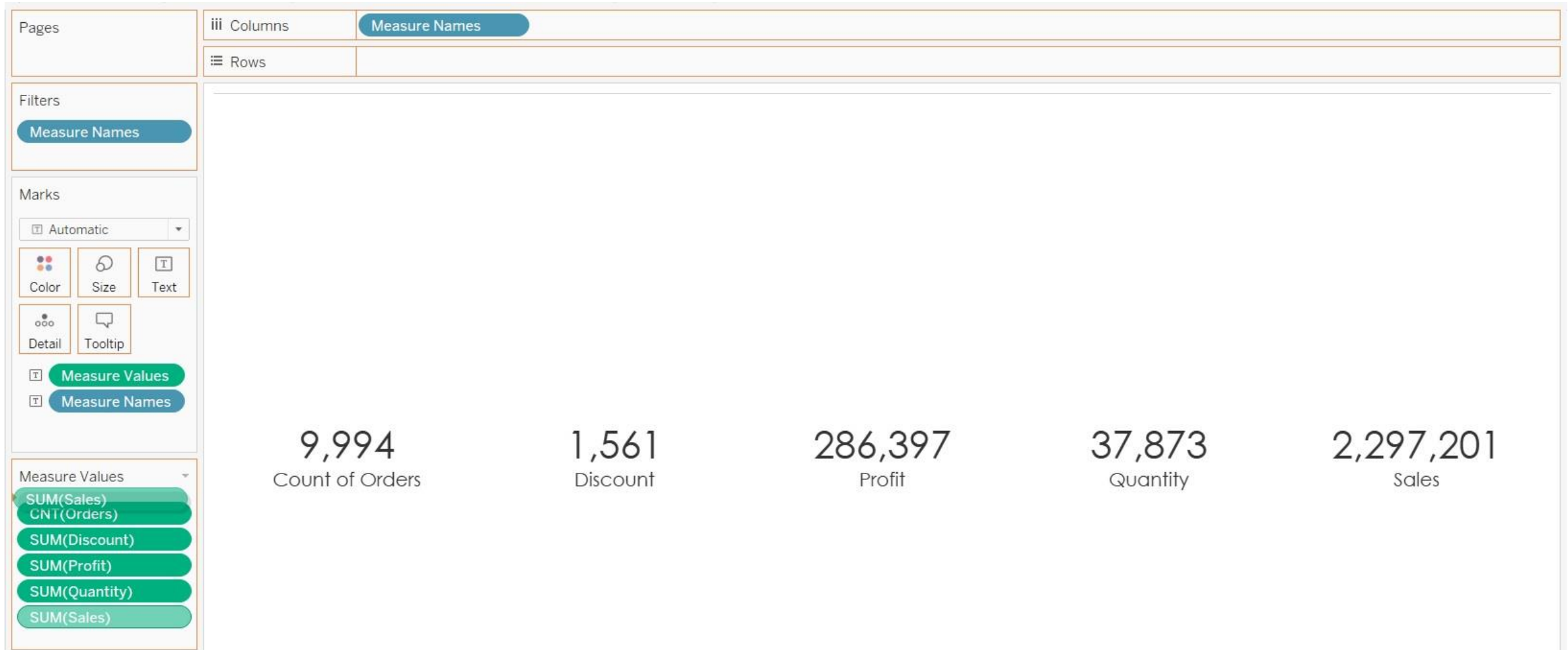
CREATING KPI CARDS IN TABLEAU

This is the view after editing the Font on **Text** of **Marks** card



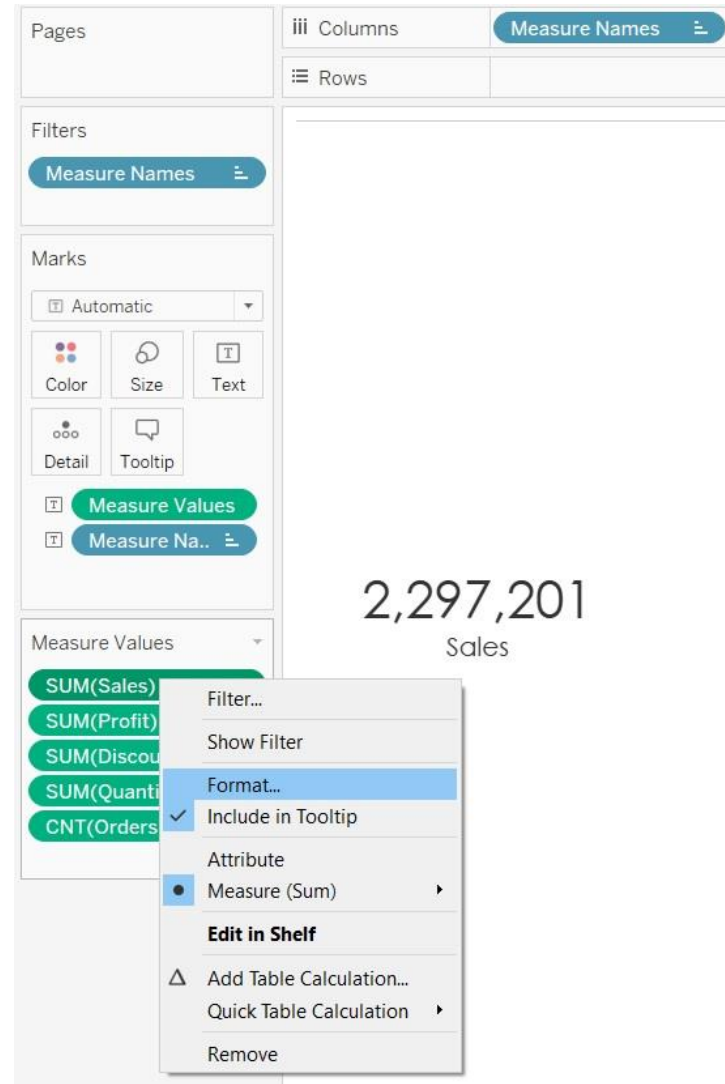
CREATING KPI CARDS IN TABLEAU

We can re-order the pills in the **Measure Values** shelf as per requirement



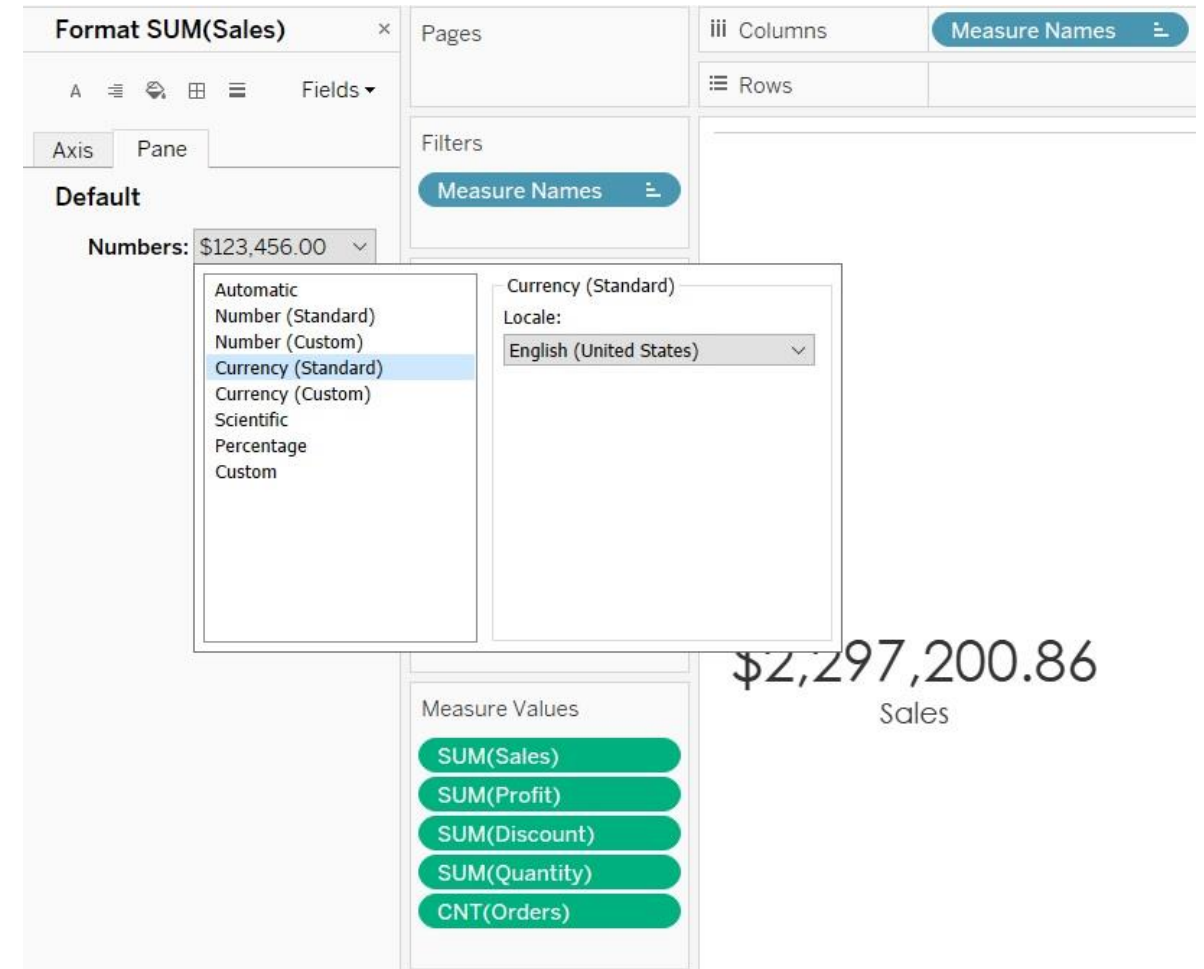
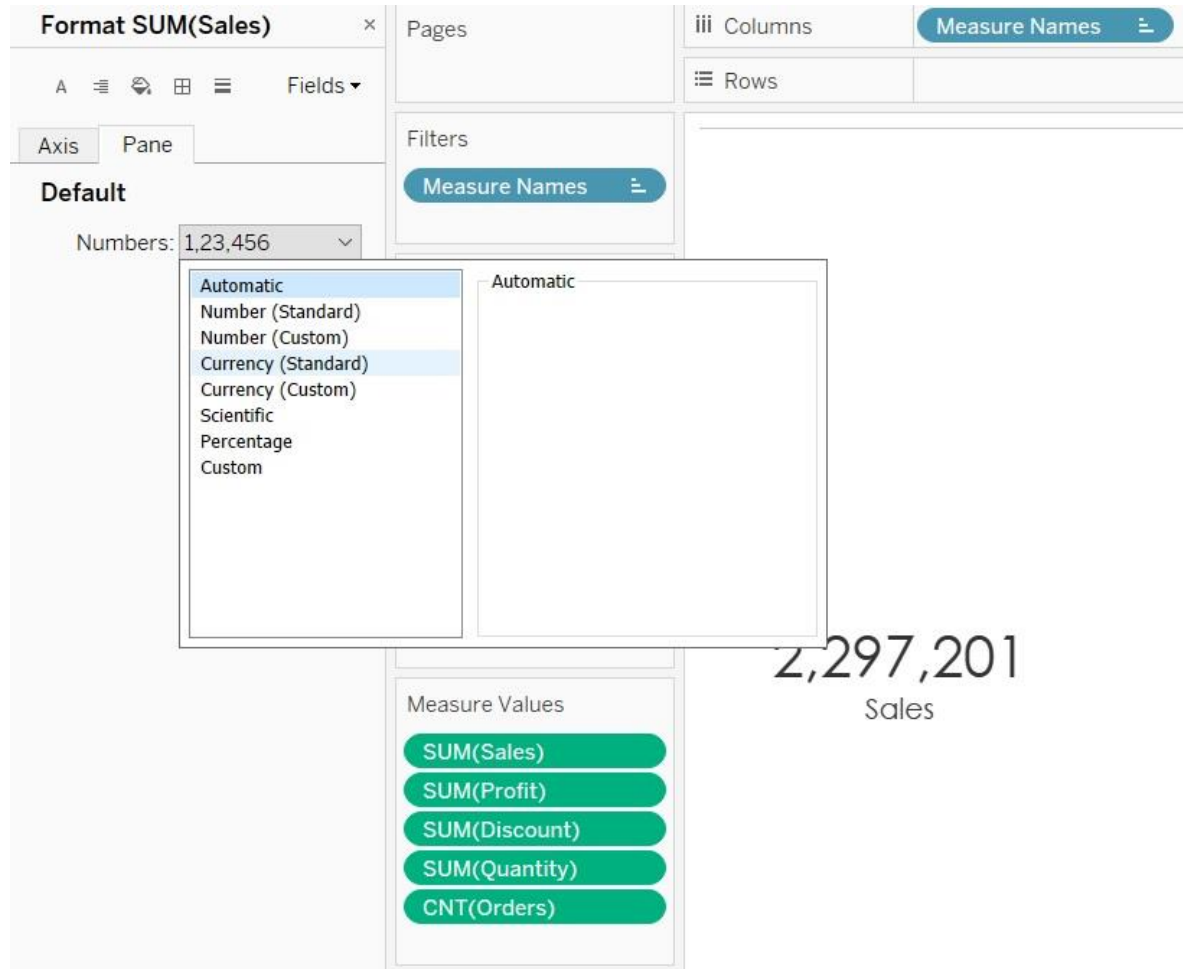
CREATING KPI CARDS IN TABLEAU

If required, we can format the values. Right-click on **SUM(Sales)**, Select **Format**



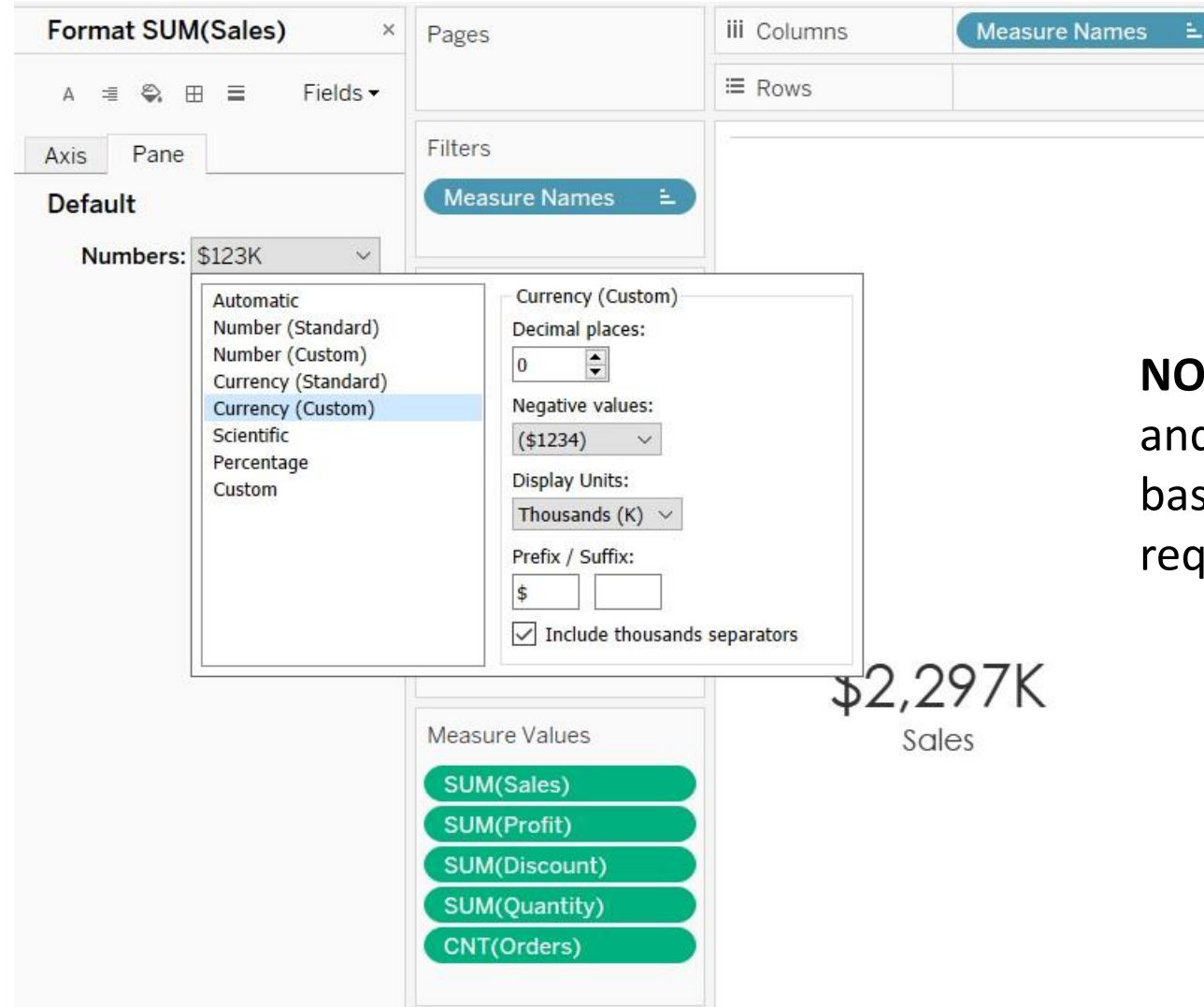
CREATING KPI CARDS IN TABLEAU

In **Format SUM(Sales)**, Under **Pane > Numbers > Select Currency (Standard)**
Select English (United States)



CREATING KPI CARDS IN TABLEAU

In **Format SUM(Sales)**, Under **Pane > Numbers > Currency (Custom)**
Set the **Decimal places** as **0**, Set the **Display Units** as **Thousands (K)**



NOTE: This is only an example, and the settings may vary based on the end user requirement

CREATING KPI CARDS IN TABLEAU

Similarly change the format for the other values e.g: **SUM(Profit)**

The screenshot shows the Tableau interface with the 'Format SUM(Profit)' dialog box open. The 'Numbers' dropdown is set to '\$123K'. The 'Currency (Custom)' format is selected in the list, and its settings are shown in the right pane: 'Decimal places' is 0, 'Negative values' is '(\$1234)', 'Display Units' is 'Thousands (K)', 'Prefix / Suffix' is '\$', and 'Include thousands separators' is checked. In the background, a 'Measure Values' shelf contains buttons for SUM(Sales), SUM(Profit), SUM(Discount), SUM(Quantity), and CNT(Orders). To the right, two KPI cards are visible: 'Sales' with a value of '\$2,297K' and 'Profit' with a value of '\$286K'.

Format SUM(Profit)

Pages

Columns Measure Names

Rows

Filters Measure Names

Axis Pane

Default

Numbers: \$123K

Automatic
Number (Standard)
Number (Custom)
Currency (Standard)
Currency (Custom)
Scientific
Percentage
Custom

Currency (Custom)

Decimal places:
0

Negative values:
(\$1234)

Display Units:
Thousands (K)

Prefix / Suffix:
\$

☒ Include thousands separators

Measure Values

SUM(Sales)
SUM(Profit)
SUM(Discount)
SUM(Quantity)
CNT(Orders)

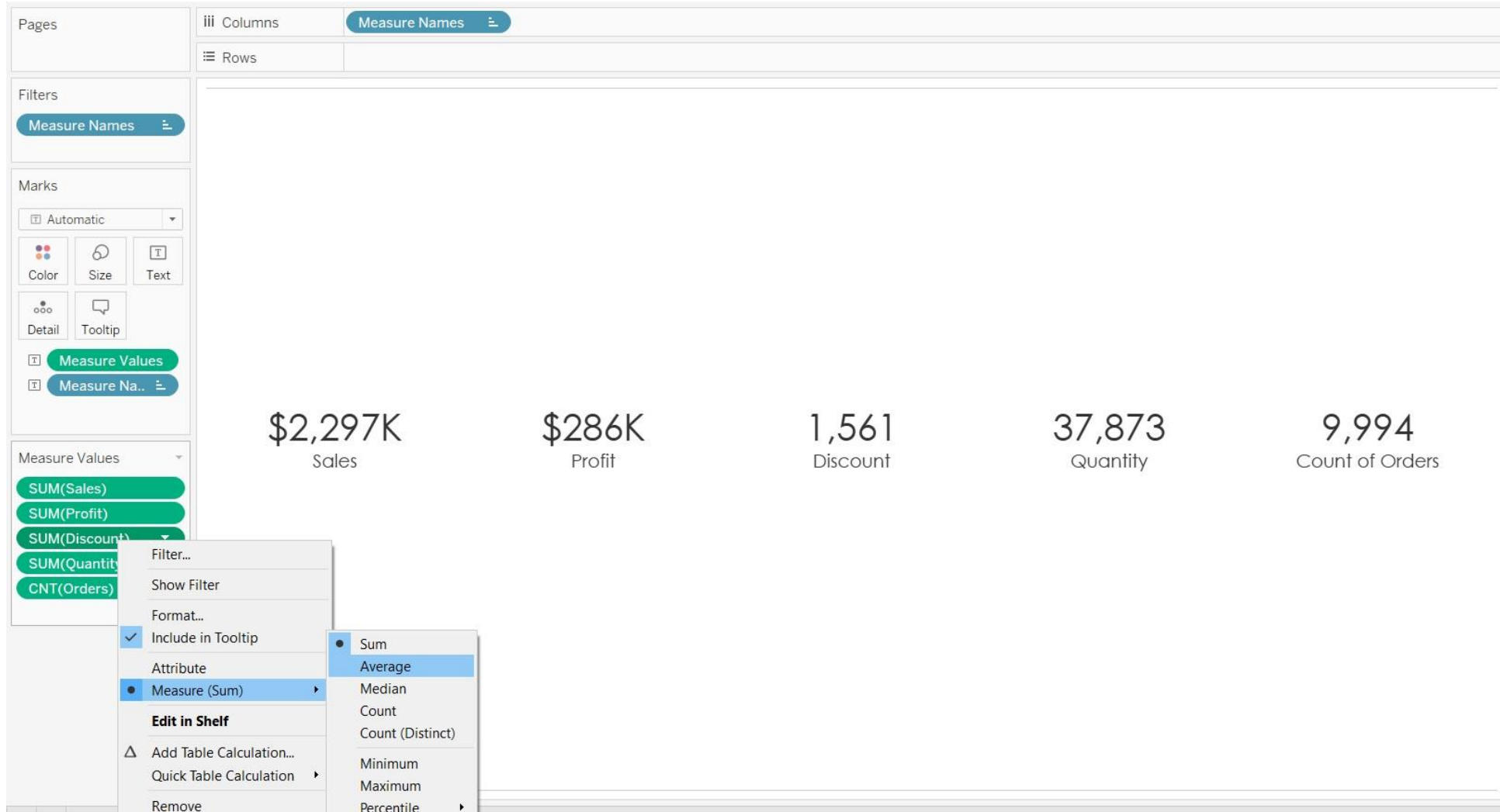
\$2,297K
Sales

\$286K
Profit

NOTE: This is only an example, and the settings may vary based on the end user requirement

CREATING KPI CARDS IN TABLEAU

If required, we can also change the aggregation for certain values
Right-click on **SUM(Discount)**, Select **Measure (Sum) > Average**



CREATING KPI CARDS IN TABLEAU

If required, we can also change the number format as per requirement
In **Format AVG(Discount)**, Under **Pane > Default > Numbers > Percentage**

The screenshot shows the Tableau interface with the 'Format AVG(Discount)' pane open. The 'Default' tab is selected, and the 'Numbers' dropdown is set to '12345600.0...'. A context menu is open, showing the 'Percentage' option selected. The 'Percentage' sub-menu is also visible, showing 'Decimal places: 2'. The main view displays three KPI cards: Sales (\$2,297K), Profit (\$286K), and Avg. Discount (15.62%). The 'Measure Values' pane on the right lists the measures: SUM(Sales), SUM(Profit), AVG(Discount), SUM(Quantity), and CNT(Orders).

Measure	Value
Sales	\$2,297K
Profit	\$286K
Avg. Discount	15.62%

CREATING KPI CARDS IN TABLEAU

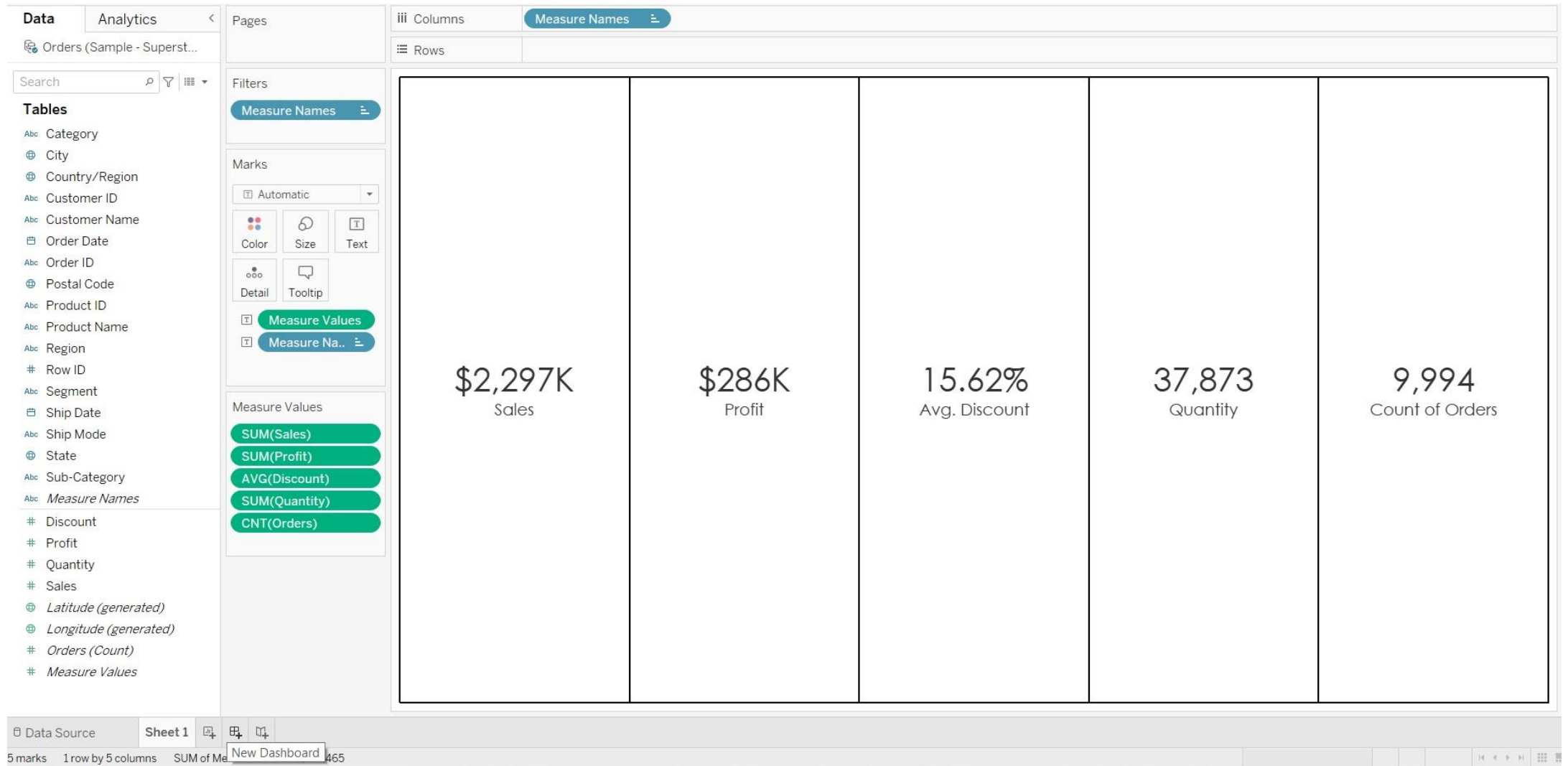
If required, we can set the border as per requirement
In **Format Borders**, Under **Sheet**, Select the line settings

The screenshot displays the Tableau interface with the **Format Borders** dialog box open on the left. The dialog is set to the **Sheet** tab, showing options for Default, Total, Grand Total, Row Divider, and Column Divider borders. A color palette is visible for the border color selection. The main dashboard area shows a table with five columns, each representing a KPI card. The first column is highlighted in light blue and contains the value **\$2,297K** for **Sales**. The other columns are white and contain values for **Profit** (\$286K), **Avg. Discount** (15.62%), **Quantity** (37,873), and **Count of Orders** (9,994). The dashboard is titled **Measure Names** and includes a **Measure Values** section with buttons for SUM(Sales), SUM(Profit), AVG(Discount), SUM(Quantity), and CNT(Orders).

Measure Names	Measure Values
\$2,297K Sales	SUM(Sales)
\$286K Profit	SUM(Profit)
15.62% Avg. Discount	AVG(Discount)
37,873 Quantity	SUM(Quantity)
9,994 Count of Orders	CNT(Orders)

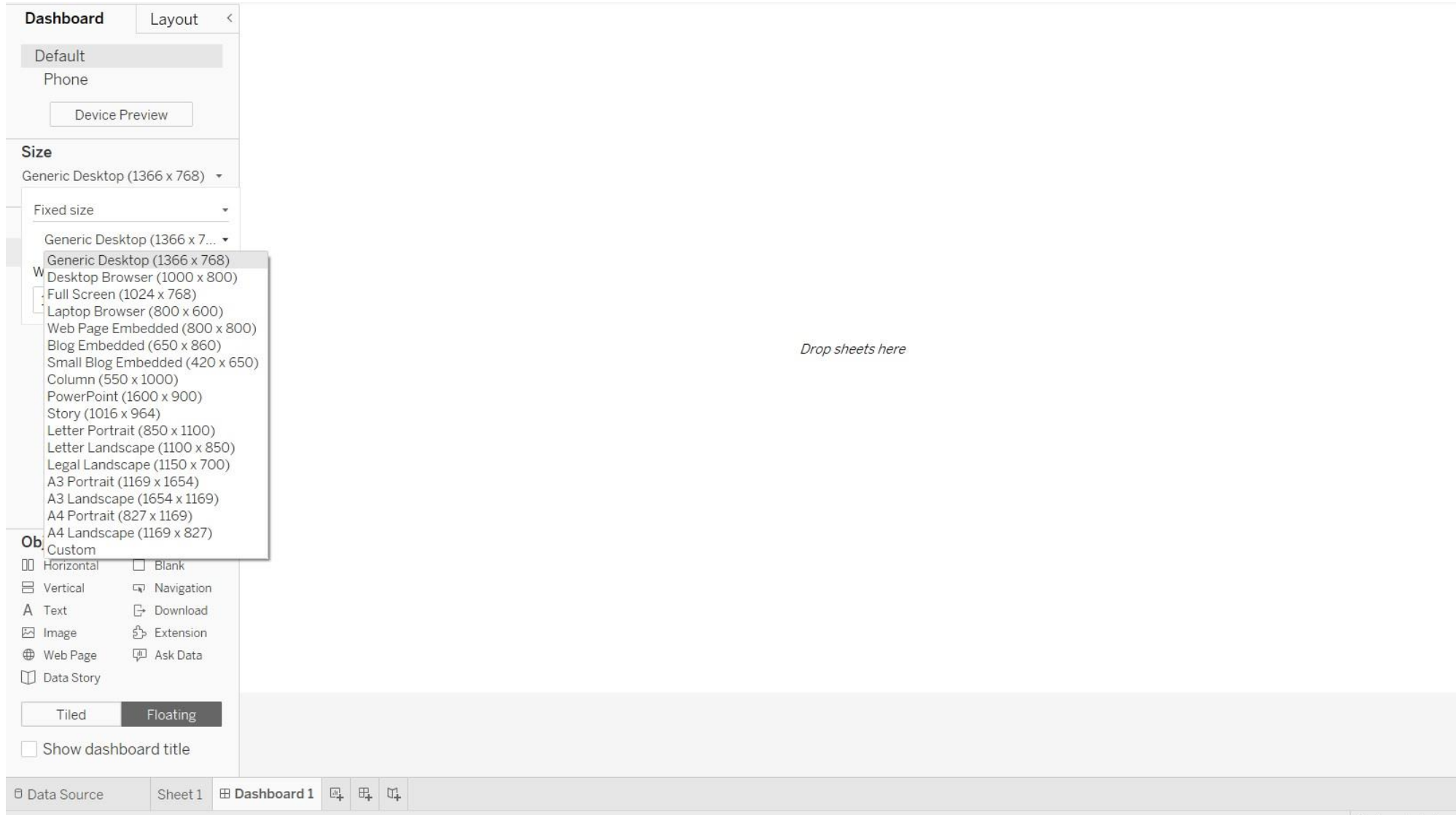
CREATING KPI CARDS IN TABLEAU

Click on **New Dashboard**



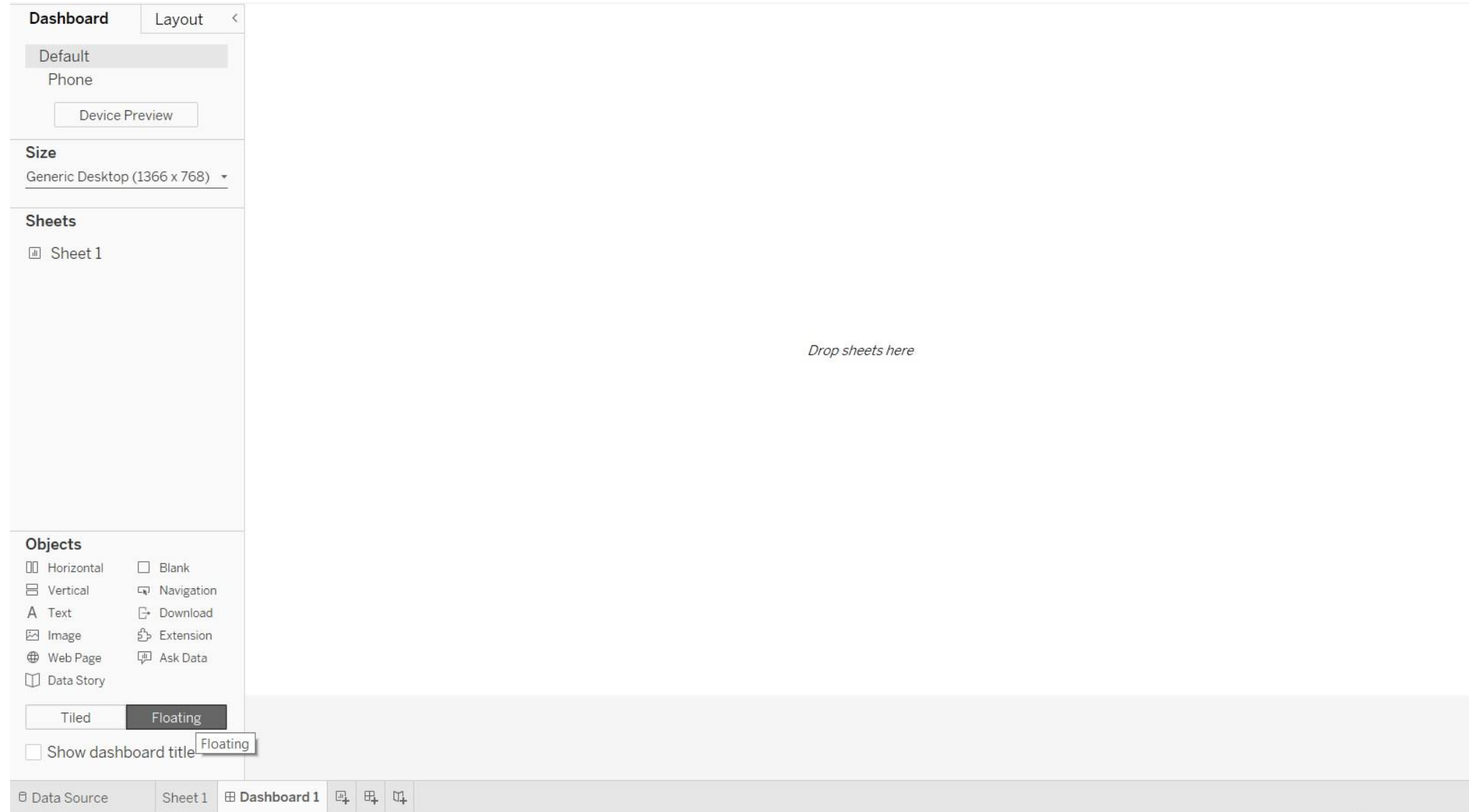
CREATING KPI CARDS IN TABLEAU

Select the required Dashboard **Size**



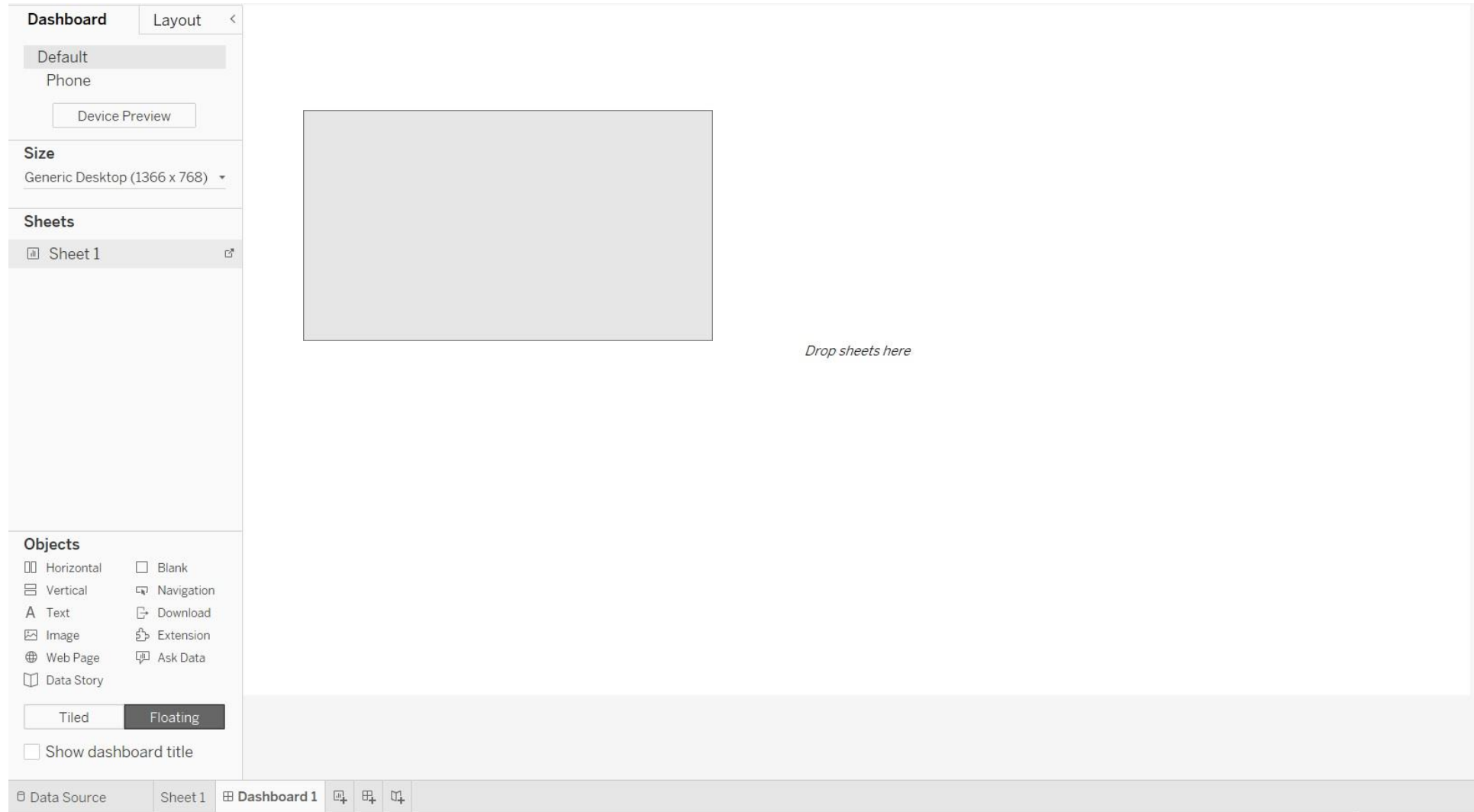
CREATING KPI CARDS IN TABLEAU

Select the **Floating** option



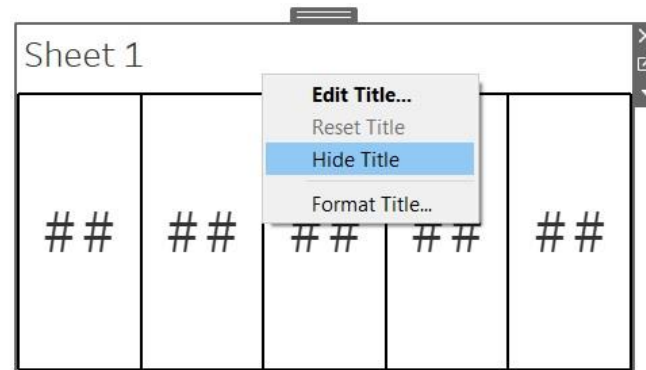
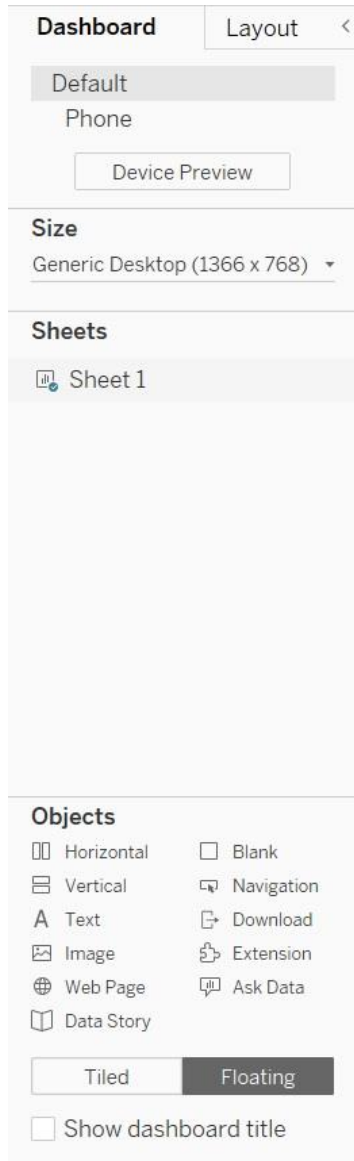
CREATING KPI CARDS IN TABLEAU

Drag the KPI Card sheet into the Dashboard



CREATING KPI CARDS IN TABLEAU

Right-click the Title and select **Hide Title** (if any)



CREATING KPI CARDS IN TABLEAU

Select the KPI Card sheet, In **Layout** pane > Edit the **Position** and **Size** as per requirement

The screenshot displays the Tableau interface with the **Layout** pane open on the left. The **Selected item** is **Sheet 1**. The **Position** settings show **x** at 0 and **y** at 60. The **Size** settings show **w** at 1,366 and **h** at 130. The **Border** is set to **None**, and the **Background** is also **None**. The **Outer Padding** is set to 0 for all sides. The **Inner Padding** is also set to 0. The **Item hierarchy** shows **Dashboard 1** containing **Sheet 1**.

The main dashboard area shows five KPI cards arranged horizontally at the top:

KPI Value	Metric
\$2,297K	Sales
\$286K	Profit
15.62%	Avg. Discount
37,873	Quantity
9,994	Count of Orders

The bottom status bar shows **Data Source**, **Sheet 1**, and **Dashboard 1**.

CREATING KPI CARDS IN TABLEAU

This is the final KPI Card view in the Dashboard

\$2,297K Sales	\$286K Profit	15.62% Avg. Discount	37,873 Quantity	9,994 Count of Orders

CREATING KPI CARDS IN TABLEAU

In case the design has too many measures we can filter and retain only the required fields.

In the KPI sheet, Right-click on **Measure Names** in **Filters** shelf > **Edit Filter**

In the **Filter [Measure Names]** dialog box we can select only the required measures

