

HOW TO ADD A QUICK TABLE CALCULATION

STEP 1: Assume that we have a Crosstabs Sales view of Year(Order Date) Vs Region

The screenshot shows the Tableau interface with the following configuration:

- Columns:** YEAR(Order Date)
- Rows:** Region
- Marks:** SUM(Sales)

The main view displays a "Quick Table Calculation" table with the following data:

Region	Order Date			
	2016	2017	2018	2019
Central	\$104K	\$103K	\$147K	\$147K
East	\$129K	\$156K	\$181K	\$213K
South	\$104K	\$71K	\$94K	\$123K
West	\$148K	\$140K	\$187K	\$250K

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STEP 2: On the **Marks** card, right-click **SUM(Sales)** and select **Quick Table Calculation > Difference**.

Note: We can only perform quick table calculations on measures in the view.

The screenshot shows the Tableau interface with the following configuration:

- Columns:** YEAR(Order Date)
- Rows:** Region
- Marks:** SUM(Sales)

A right-click context menu is open over the **SUM(Sales)** mark. The menu options are:

- Filter...
- Show Filter
- Format...
- ☒ Include in Tooltip
- Dimension
- Attribute
- Measure (Sum)
 - Discrete
 - Continuous
- Edit in Shelf
- Add Table Calculation...
- Quick Table Calculation
 - Running Total
 - Difference**
 - Percent Difference
 - Percent of Total
 - Rank
 - Percentile
 - Moving Average
 - YTD Total
 - Compound Growth Rate
 - Year Over Year Growth
 - YTD Growth
- Remove

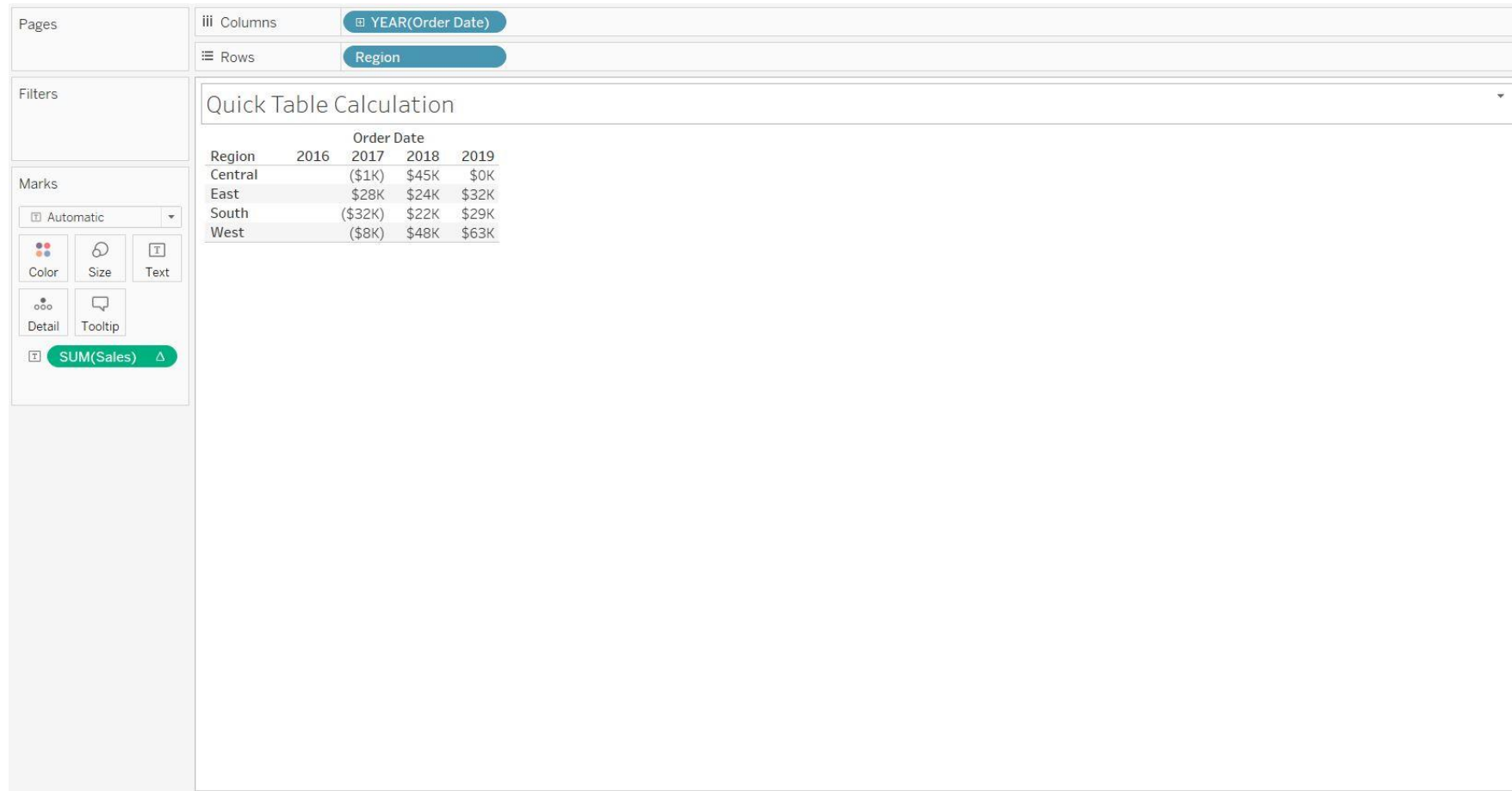
The **Quick Table Calculation > Difference** option is selected. The background view displays a table titled "Quick Table Calculation" with the following data:

Region	Order Date			
	2016	2017	2018	2019
Central	\$104K	\$103K	\$147K	\$147K
East	\$129K	\$156K	\$181K	\$213K
South	\$104K	\$71K	\$94K	\$123K
West	\$148K	\$140K	\$187K	\$250K

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STEP 3: A **delta** symbol appears on the field to indicate that a quick table calculation is being applied to the field

The visualization is also updated as per the quick table calculation



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STEP 4: On the Marks card, right-click **Sum(Sales)** and select **Edit Table Calculation**

The screenshot shows the Tableau interface with the following configuration:

- Columns:** YEAR(Order Date)
- Rows:** Region
- Marks:** SUM(Sales)

A context menu is open over the SUM(Sales) pill, showing the following options:

- Filter...
- Show Filter
- Format...
- ☒ Include in Tooltip
- Dimension
- Attribute
- ☒ Measure (Sum) ▶
- Discrete
- ☒ Continuous
- Edit in Shelf**
- Compute Using ▶
- Relative to ▶
- △ Edit Table Calculation...**
- Clear Table Calculation
- Quick Table Calculation ▶
- Remove

The Quick Table Calculation table displays the following data:

Region	Order Date			
	2016	2017	2018	2019
Central		(\$1K)	\$45K	\$0K
East		\$28K	\$24K	\$32K
South		(\$32K)	\$22K	\$29K
West		(\$8K)	\$48K	\$63K

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STEP 5: In the dialog box that opens, we can configure the following options:

The calculation type

How to aggregate the values

How to compute the calculation (how to address and partition the calculation)

The screenshot shows the Tableau interface with a 'Quick Table Calculation' dialog box open. The dialog box is titled 'Table Calculation' and 'Difference in Sales'. It contains the following options:

- Calculation Type:** Difference From
- Compute Using:** Table (across)
- Specific Dimensions:** ☒ Year of Order Date, ☐ Region
- At the level:** (dropdown)
- Relative to:** Previous
- ☒ Show calculation assistance

The background shows a table with the following data:

Region	2016	2017	2018	2019
Central	(\$1K)	\$45K	\$0K	
East		\$28K	\$24K	\$32K
South		(\$32K)	\$22K	\$29K
West		(\$8K)	\$48K	\$63K

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STEP 6: Change the **Compute Using** to **Table (down)**

The visualization updates as we make changes to the calculation.

Highlighting is used to demonstrate how the calculation is being computed.

Exit the dialog box

The screenshot shows the Tableau interface with a 'Quick Table Calculation' dialog box open. The dialog box is titled 'Table Calculation' and 'Difference in Sales'. It has sections for 'Calculation Type' (set to 'Difference From'), 'Compute Using' (with 'Table (down)' selected), 'Specific Dimensions' (with 'Region' checked and 'Year of Order Date' unchecked), 'At the level' (set to 'Previous'), and 'Show calculation assistance' (checked). In the background, a table visualization is visible with columns for 'Region' and 'Order Date' (years 2016, 2017, 2018, 2019). The '2016' column is highlighted in yellow, and the 'West' row is highlighted in blue.

Region	2016	2017	2018	2019
Central				
East	\$25K	\$53K	\$33K	\$66K
South	(\$25K)	(\$85K)	(\$87K)	(\$90K)
West	\$44K	\$69K	\$94K	\$127K

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STEP 7: This is the final view with updated compute method for the quick table calculation

The screenshot shows the Tableau interface with the following configuration:

- Columns:** YEAR(Order Date)
- Rows:** Region
- Marks:** Automatic (SUM(Sales))

The main view displays a table titled "Quick Table Calculation" with the following data:

Region	Order Date			
	2016	2017	2018	2019
Central				
East	\$25K	\$53K	\$33K	\$66K
South	(\$25K)	(\$85K)	(\$87K)	(\$90K)
West	\$44K	\$69K	\$94K	\$127K