

Program 3. Creating a View - formatting charts, adding filters, creating calculated fields and defining parameters

Step 1: Connect to Data

1. Open Tableau Desktop.
2. Connect to Your Data Source

a) Click on Connect on the left sidebar

b) Choose your data source by selecting text file and load your vgsales dataset into Tableau.

Step 2: Create a Basic Visualization

- Create a New Worksheet:

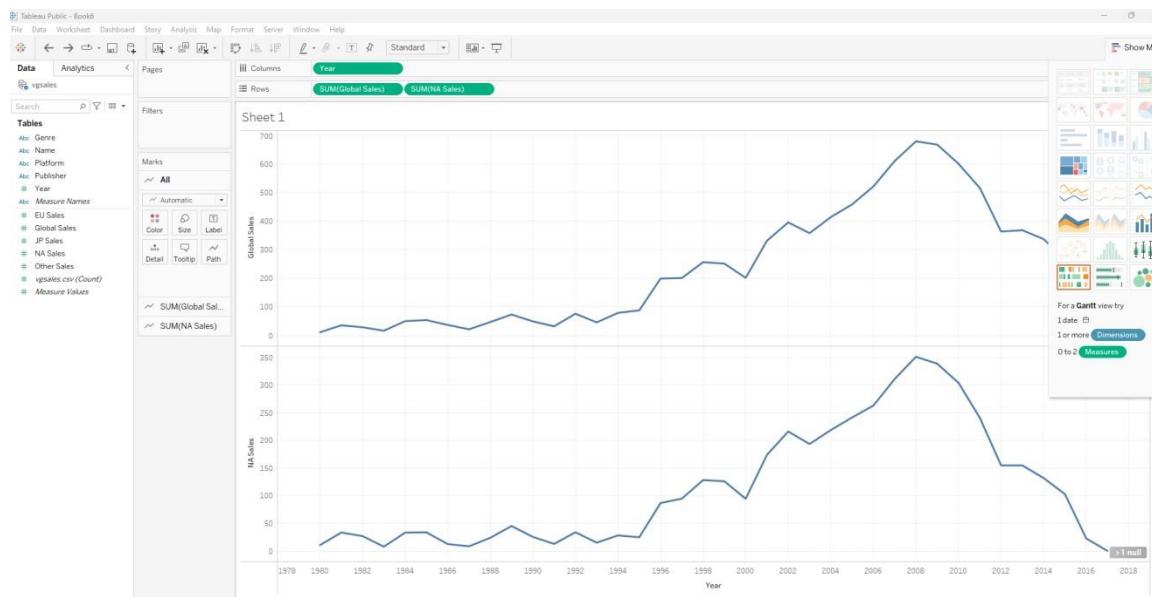
a) Click on the Sheet tab at the bottom of the screen.

- Drag Fields to Shelves:

a) Drag Year to the Columns shelf

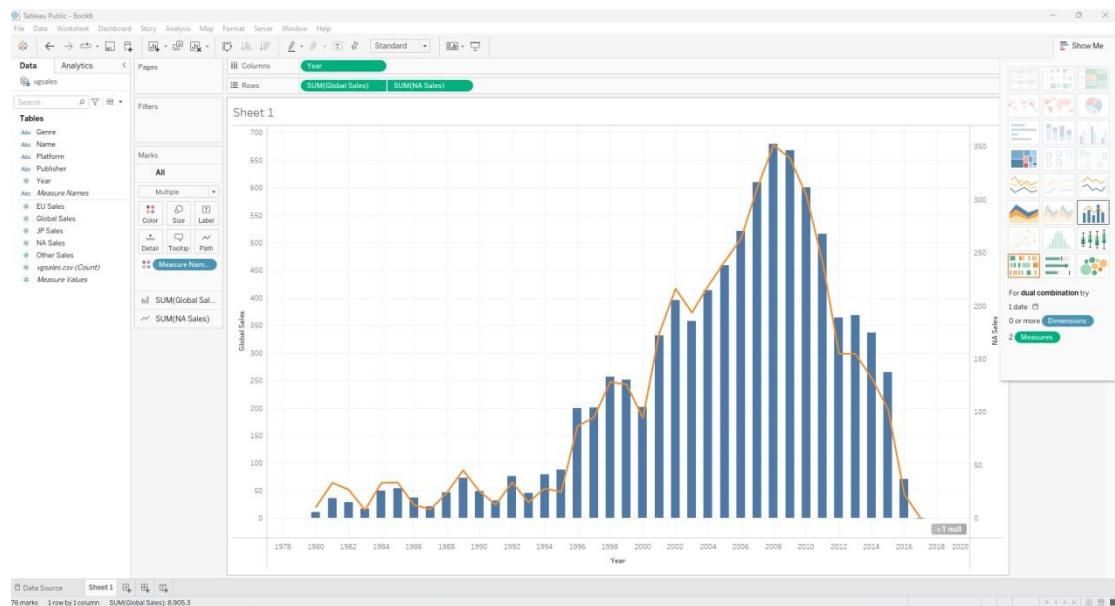
b) Drag Global Sales to the Rows shelf.

Drag EU Sales to the Rows shelf.



- Change Visualization Type:

In the Show Me panel on the right, select a bar chart or any other type that suits your needs.



Step 3: Format the Chart

- **Format Axes:**

- a) Right-click on the Global Sales axis and select Format.
- b) In the Format pane, adjust the font style & size as needed.

- **Add Titles and Annotations:**

- a) Click on the chart title area and enter a descriptive title - Global Sales by Year.
- b) Add annotations if needed to highlight specific data points – Right click the on the chart which you want to highlight - Select Annotate - Select Mark - Press Ok



Step 4: Add Filters

Add a Filter for Year:

Drag Year to the Filters shelf.

Choose the range of years you want to display (e.g., 2000-2016).



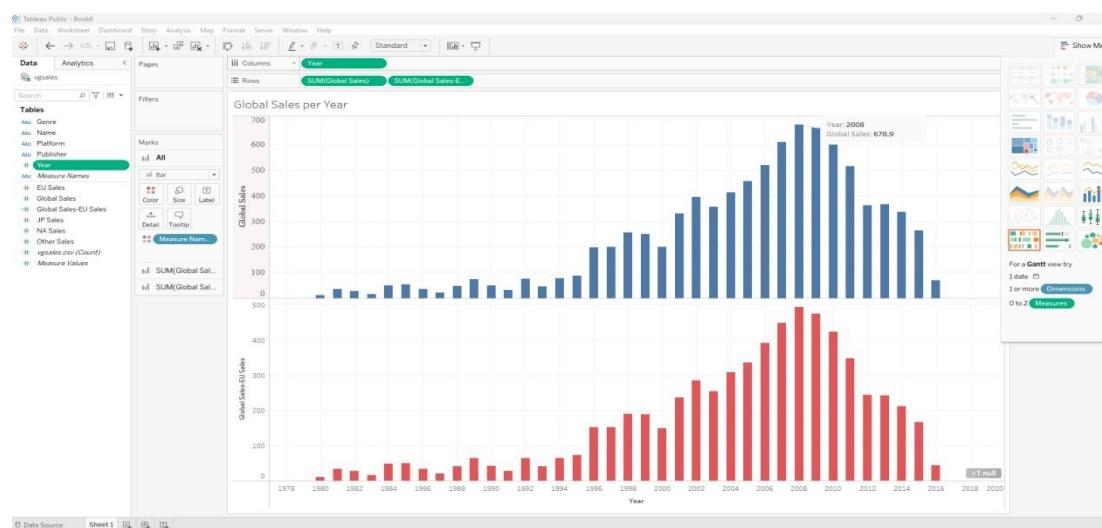
Step 5: Create Calculated Fields

- Create a Calculated Field for Sales Category:

- Right-click on Global Sales - Select Create - Calculated Field.
- Give name to your calculations as Global Sales - EU Sales
- Do calculations as per your need - [Global Sales] - [EU Sales]
- Press Ok

Add Calculated Fields to Visualization:

- Drag Global Sales-EU Sales to the Rows shelf to show Global Sales over Year with Global Sales-EU Sales over Year.



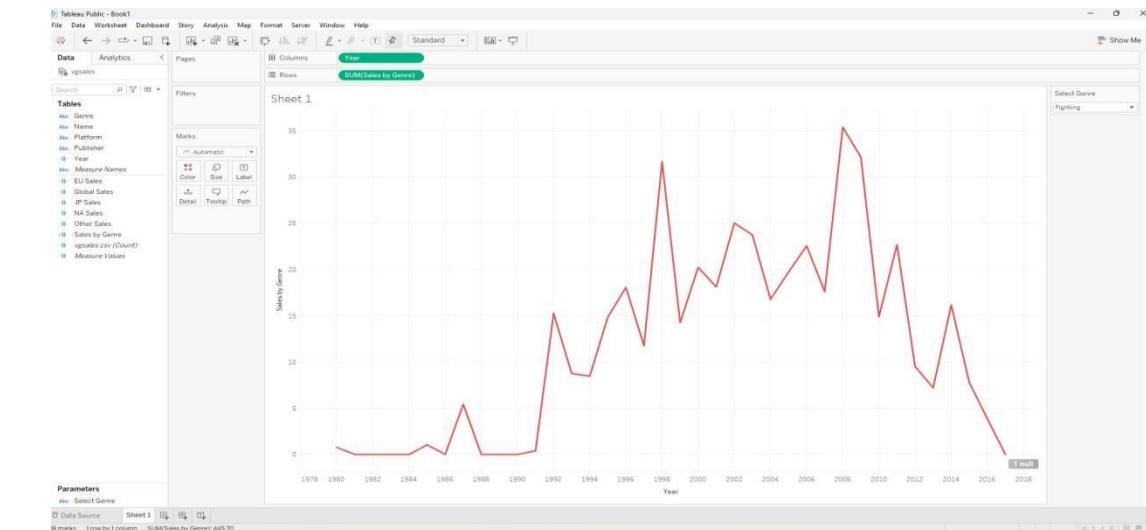
Step 6: Create a Parameter:

Name: "Select Genre"

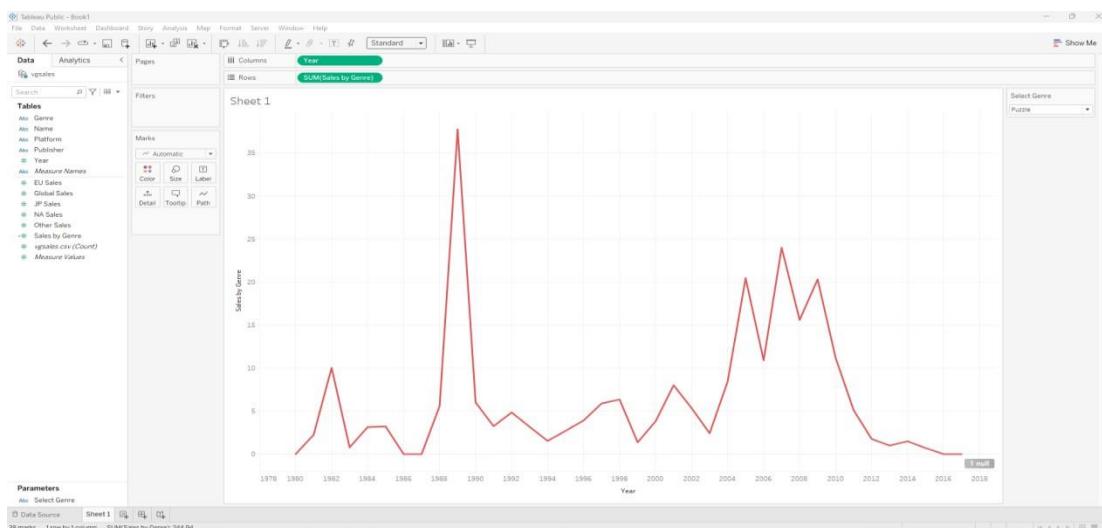
- Data Type:** String
- Values:** List (e.g., "Action", "Adventure", "Shooter") or Add values from Genre.
- Create a Calculated Field:**
- Name:** "Sales by Genre"
- Formula:
- IF [Genre] = [Select Genre] THEN [Global Sales] ELSE 0 END

Build the Visualization:

- Columns:** Drag "Year".
- Rows:** Drag "Sales by Genre".
- At the right side of your sheet you can select required Genre and can see different Visualization



Visualization by Genre: Puzzle



Reference Video Link - https://www.youtube.com/watch?v=_n5saTnxeoE