

Dashboard Creation Graphs

KIPs (Key indicators of performance system)

1. Drag **Measured values** Into the Labels
2. Remove the Unwanted Values
3. Drag **Measure Names** into the columns
4. Bold the headings and measured names Using the format

Sales by Region (Bar Chart)

1. Steps
2. New sheet → drag Region to Columns.
3. Drag **SUM(Sales)** to Rows.
4. Color by Region → drag Region to Color.
5. Sort descending by Sales.
6. Add labels on bars → drag Sales to Label.

Create a basic bar chart

1. Drag **Sub-Category** → **Rows**.
2. Drag **SUM(Sales)** → **Columns**.
3. Sort **descending** (click the Sort icon on the toolbar).
4. Hold **Ctrl (Cmd)** and drag **SUM(Sales)** again onto **Columns** – you should now see **SUM(Sales) twice** on the Columns shelf.
5. Right-click the second **SUM(Sales) pill** → **Dual Axis**.
6. Right-click on one of the axes → **Synchronize Axis**.
7. On the Marks card, you'll see two sections (one for each SUM(Sales)).
8. Click the first SUM(Sales) Marks card → set Mark Type to Bar.
9. Click the second SUM(Sales) Marks card → set Mark Type to Circle.
10. Increase the Size slider slightly (so it looks like the head of a lollipop).

Sales vs Profit Scatter Plot

- New sheet → drag **SUM(Sales)** to Columns, **SUM(Profit)** to Rows.
- Drag **Sub-Category** to Detail.
- Drag **Category** to Color.
- Add **trend line** → Analytics pane → drag Trend Line → Linear.
- Optional: Add Profit Ratio label:
 - **SUM([Profit]) / SUM([Sales])**

Monthly Sales Trend (Line Chart)

- New sheet → drag Order Date to Columns → select **MONTH(Order Date)** (continuous).
- Drag **SUM(Sales)** to Rows.
- Add **Segment to Color** (optional).
- Add **Trend Line** from Analytics pane.
- Format date axis as Month Year.

Profit by Sub-Category (Bar)

1. New sheet → drag **Sub-Category** to Rows.
2. Drag **SUM(Profit)** to Columns.
3. Sort descending.
4. Color by **Profit (Green = Positive, Red = Negative)**:
5. Create calculated field **Profit Color**:
 - a. **IF SUM([Profit]) >= 0 THEN "Profit" ELSE "Loss" END**
6. Drag **Profit Color** it to Color.
7. Add label (**Profit value**).

Sales by State

1. New sheet → drag **State to Detail** → Tableau auto-maps.
2. Drag **SUM(Sales)** to Color.
3. Add **labels** (optional).
4. Use **filled map** style.

Arrangements

1. Click New Dashboard.
2. Set size: Automatic or 1200x800.
3. Drag sheets into the layout:
 - **Top → KPI Text Tile**
 - **Left → Sales by Region**
 - **Right → Donut (Category)**
 - **Middle → Monthly Sales Line**
 - **Bottom Left → Profit by Sub-Category**
 - **Bottom Right → Scatter Plot**
 - **Background → optional color or company logo.**
 - **Optionally add Map as background or side panel.**

Add Global Filters (for Interactivity)

1. Go to **one chart** (e.g., Region chart).
2. Click **top-right corner** → “Use as Filter.”
3. Now when **you click any region** → **all charts update**.
4. Add one more filter – Category (right-click Category → Show Filter) and apply to all worksheets using same data source.

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