Visualization in Tableau

Simple Bar chart: Sales by Category (Superstore)

- Open Tableau, connect to sample_-_superstore.xls → choose the Orders sheet (or the main sheet).
- Drag **Category** to Rows.
- Drag **SUM(Sales)** to Columns.
- Sort **descending** (click the sort icon on the toolbar or right-click **Category → Sort → Field**: **SUM(Sales) Descending**).
- Drag **SUM(Sales)** to **Label on Marks card** to show values.
- Rename sheet: **Sales by Category**.

Sorted horizontal bars: Top States by Sales (Superstore)

- New sheet.
- Drag **State** to Rows.
- Drag **SUM(Sales)** to Columns.
- Sort **descending.**
- Right-click **State → Keep Only top 10 by SUM(Sales)** or create a Top N filter:
- Drag **State** to **Filters → Top → By field → Top 10 by SUM(Sales).**
- **Swap axes** if you want **horizontal bars (or keep as is).**
- **Add label**: drag **SUM(Sales)** to Label.
- **Add color by Region**: **drag Region to Color.**

Donut chart (Segment share)

- New sheet.
- Create a **pie** and **then donut:**
- Drag **Segment** to **Color on Marks** (use Pie mark).
- Create **Angle using SUM(Sales)** (**drag SUM(Sales) to Angle**).
- Drag **Segment to Label** and **set label to show Percent of Total**:
- **Label → Text → insert SUM(Sales)** and **then quick table calculation → Percent of Total.**
- To make donut: Create a duplicate axis — create a calculated field Zero = 0, put it on Columns, dual axis, and synchronize—(or simply accept pie). Or put a white circle sheet as a dashboard overlay.

Histogram / Bins (HR Age distribution)

- New sheet.
- **Right-click Age → Create → Bins**. Choose bin size, e.g., 5 years (or show students how to change).
- Name: **Age (bin).**
- **Drag Age (bin) to Rows.**
- Drag **Number of Records** (or COUNT(Employee Number)) to Columns.
- **Change to Bar mark**; add labels.
- Show axis to interpret.

Line chart + Moving average: Sales over time (Superstore)

- New sheet.
- Drag **Order Date to Columns → choose continuous MONTH(Order Date)** or EXACT DATE based on dataset.
- Drag **SUM(Sales)** to Rows. This draws the line.
- Right-click **SUM(Sales)** on the axis → **Add Trend Line (optional).**
- To show **moving average**:
- Click on **SUM(Sales)** pill → Quick Table Calculation → Moving Average.

Map: Sales by State (Superstore)

- New sheet.
- Drag **State** to **Detail (Marks card)** — Tableau will detect geography.
- Drag **SUM(Sales)** to Color.
- Change **mark to Map** or **Filled Map if using polygon.**
- Add labels: **drag State to Label optionally.**
- Add tooltip: **SHOW sum of Sales and sum of Profit.**

Scatter plot with trend line (Sales vs Profit at Customer or Product level)

- New sheet.
- Aggregate at **Customer or Product level:** drag **Customer ID or Product Name to Detail.**
- Drag **SUM(Sales)** to Columns.
- Drag **SUM(Profit)** to Rows.
- Change **mark to Circle.**
- Drag **SUM(Quantity)** or Sales to Size to show magnitude.
- Add Trend Line: **Analytics pane → drag Trend Line → Linear.**
- **Show R^2 and slope (right click trend line → Describe).**

Heatmap: Sales by State × Category

- New sheet.
- Drag **State to Rows.**
- Drag **Category to Columns.**
- Drag **SUM(Sales) to Color on Marks card.**
- Set **mark to Square.**
- **Add labels or tooltip to show exact values.**

Tree map: Sales by Sub-Category (Superstore)

- New sheet.
- Drag **Sub-Category to Detail.**
- Drag **SUM(Sales) to Size.**
- Drag **SUM(Sales) to Color.**
- Change **mark to Treemap.**
- Add labels: **Sub-Category and SUM(Sales).**

Box plot: Monthly Income distribution by Department (HR)

- New sheet.
- Drag **Department** to Columns.
- Drag **Monthly Income** to Rows.
- On the show me → **drag Box Plot** into the view → choose “for every Cell” or **per Department**.
- Show **outliers and median.**

Parameter + Top N: Dynamic Top N products by Sales

- Create a **parameter:**
- Right-click in **Data pane → Create → Parameter.**
- Name: **Top N**
- Data type: Integer, Current value: 10, Range: 1 to 100 (or All).
- **Create calculated field Rank by Sales:**
- **RANK_UNIQUE(SUM([Sales]), 'desc')**
- Or use: **RANK(SUM([Sales]))**
- Create boolean calculated field Top N Filter:
- **RANK_UNIQUE(SUM([Sales])) <= [Top N]**
- Drag **Product Name** to Rows and **SUM(Sales)** to Columns.
- Drag **Top N Filter to Filters → True.**
- Show **Parameter Control: right-click Top N → Show Parameter Control.**
- Sort and format.

Stacked Bar Chart — Sales by Region & Segment (Superstore)

- Open **Tableau → connect to sample_superstore.xls → Orders** sheet.
- Drag **Region → Columns.**
- Drag **Sales → Rows.**
- Drag **Segment → Color** (on Marks card).
- Click **Sort icon** on **toolbar to sort by highest total sales**.
- Drag **Sales → Label (to display values).**
- Add **totals:**
  - Go to **Analytics pane → drag Totals → Show Row Grand Totals.**

Pie Chart — Gender-wise Attrition (HR Data)

- Open **Tableau → connect to sample_superstore.xls → Orders** sheet.
- Drag **Region → Columns.**
- Drag **Sales → Rows.**
- Drag **Segment → Color** (on Marks card).
- Click **Sort icon** on **toolbar to sort by highest total sales**.
- Drag **Sales → Label (to display values).**
- Add **totals:**
    - Go to **Analytics pane → drag Totals → Show Row Grand Totals.**

Pie Chart — Gender-wise Attrition

- Connect to **HR Data.xlsx.**
- Drag **Gender → Color.**
- Drag **Attrition → Filters → Select only Yes (people who left).**
- Drag **Gender → Label (so names show).**
- Drag **Employee Number (or any unique ID) → Angle → set aggregation to Count (Count of employees).**
- Or simpler: just drag **Attrition to Filters (Yes),** then drag **Gender to Columns** and **Number of Records to Rows,** then use Show Me → Pie Chart.
- **Click Show Me → select Pie Chart.**
- **Right-click → Quick Table Calculation → Percent of Total to show percentages.**

Optional Formula

- **COUNT([Employee Number]) / TOTAL(COUNT([Employee Number]))**

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