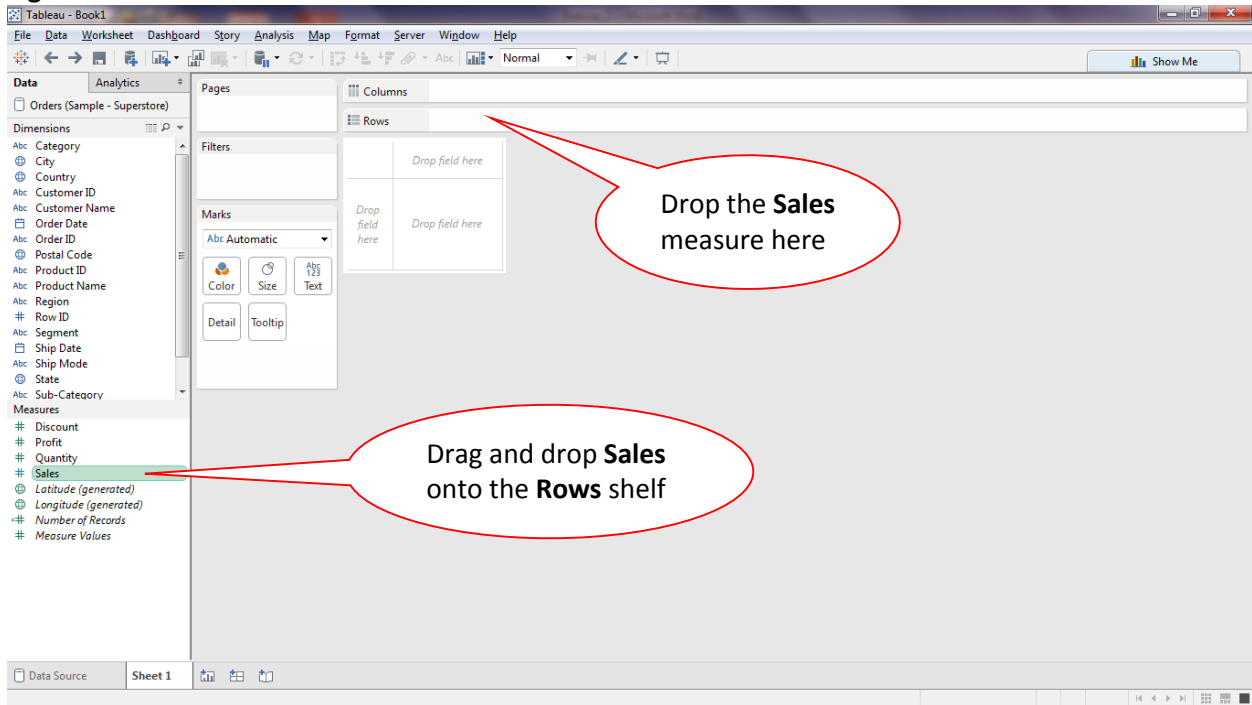**Objective:** This exercise will demonstrate some basic analysis functions in Tableau
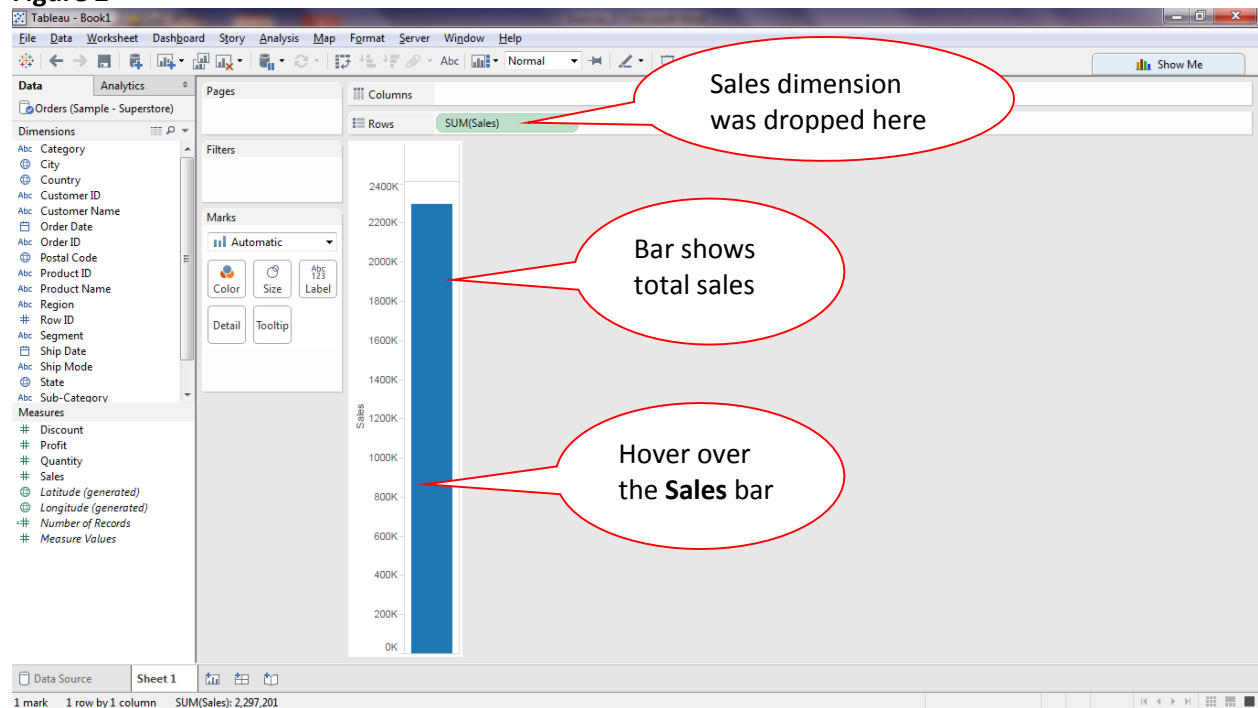
- Launch Tableau
- Open a new worksheet: Connect to the **Orders** sheet in the **Sample – Superstore** Excel file, as shown on Figure 1
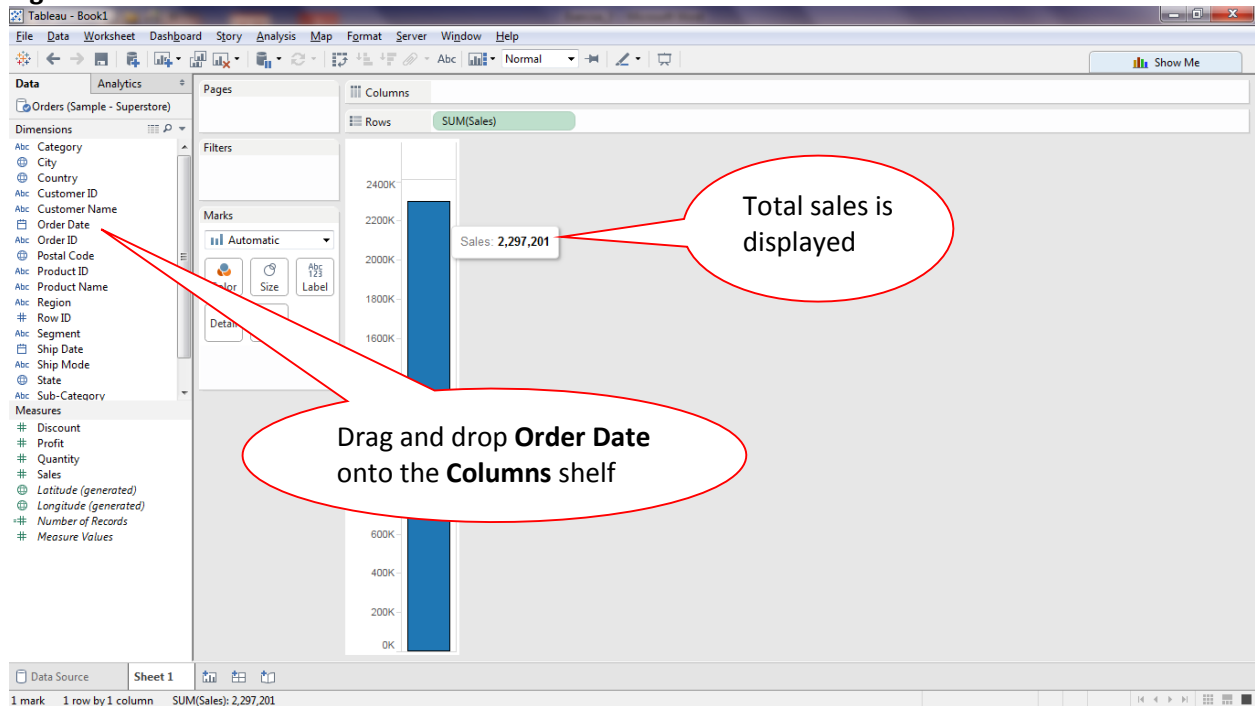
Figure 1

- Drag and drop the **Sales** measure onto the **Rows** shelf as shown on Figure 1, which will lead to the display on Figure 2

Figure 2

- Hover over the **Sales** bar as shown on Figure 2, which will display the total sales figure on Figure 3 ($2,297,201)
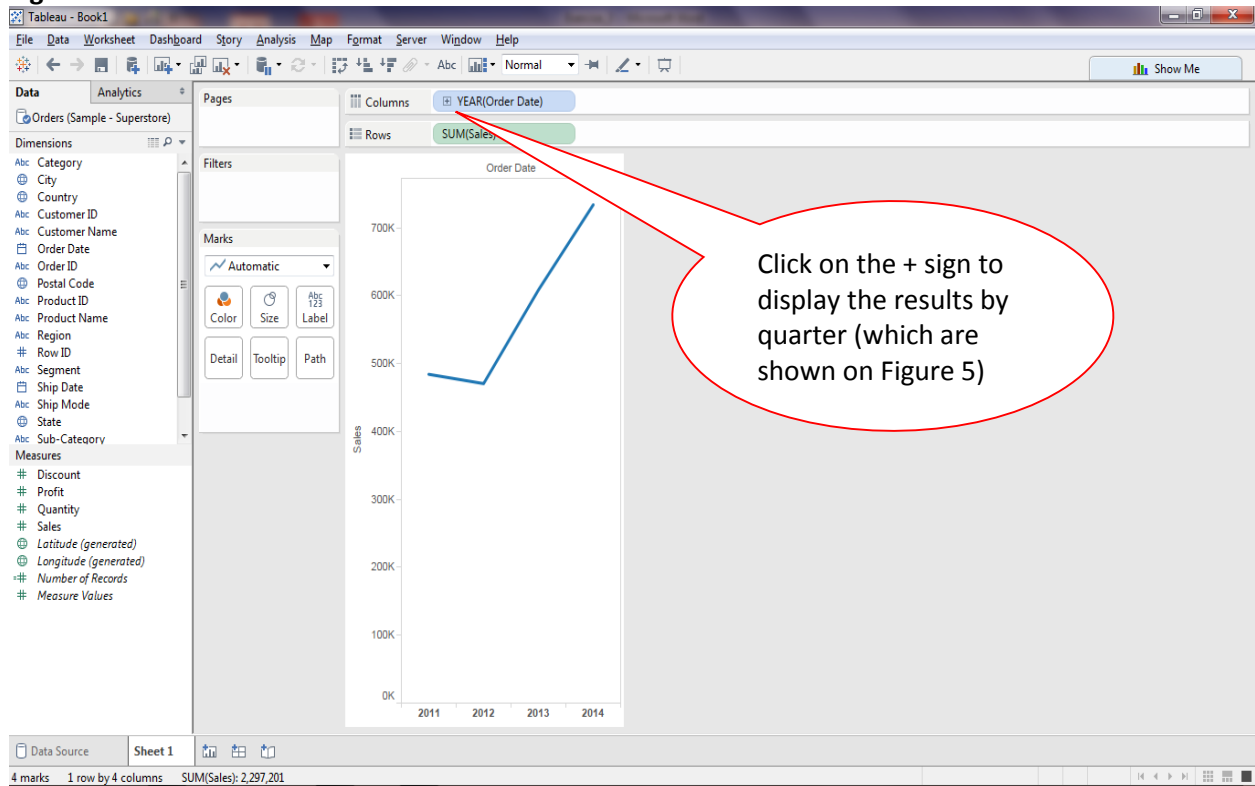
Figure 3

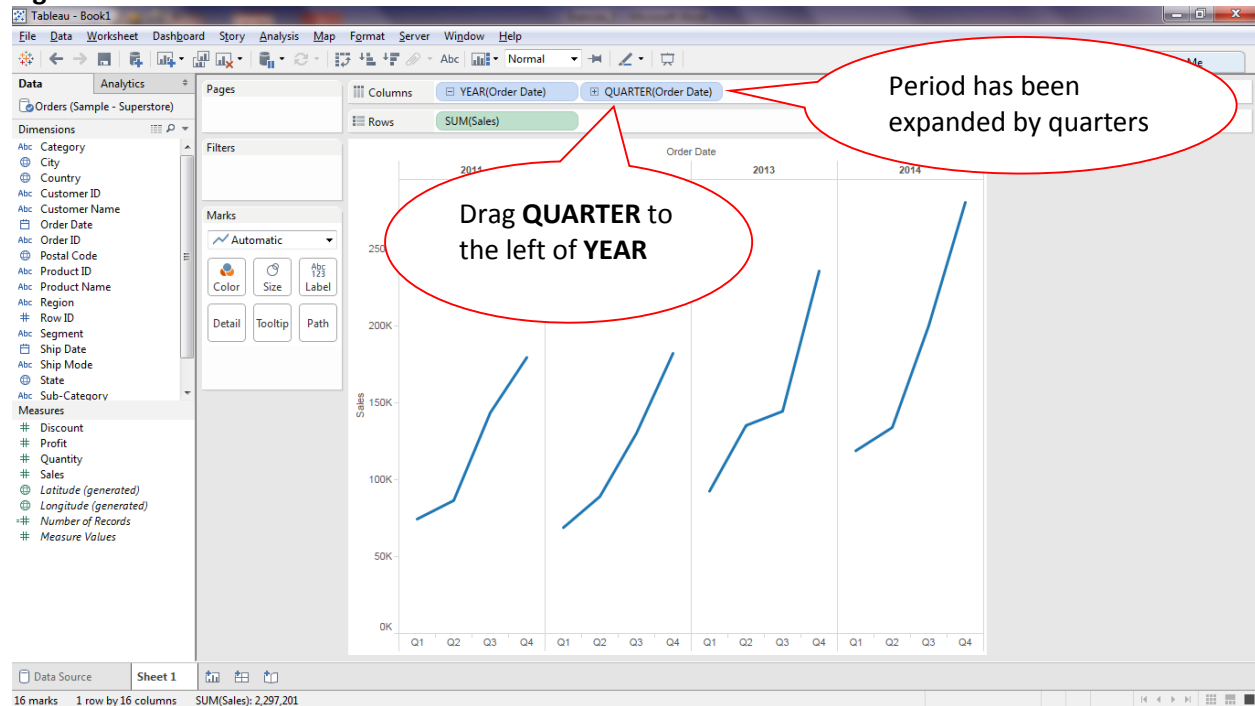
To view results over time:

- Drag and drop **Order Date** onto the **Columns** shelf as shown on Figure 3, which will lead to the display shown on Figure 4

Figure 4

- Expand the + sign, located just before the **Year (Order Date) in** the **Columns** shelf as shown on Figure 4, which will lead to the display on Figure 5
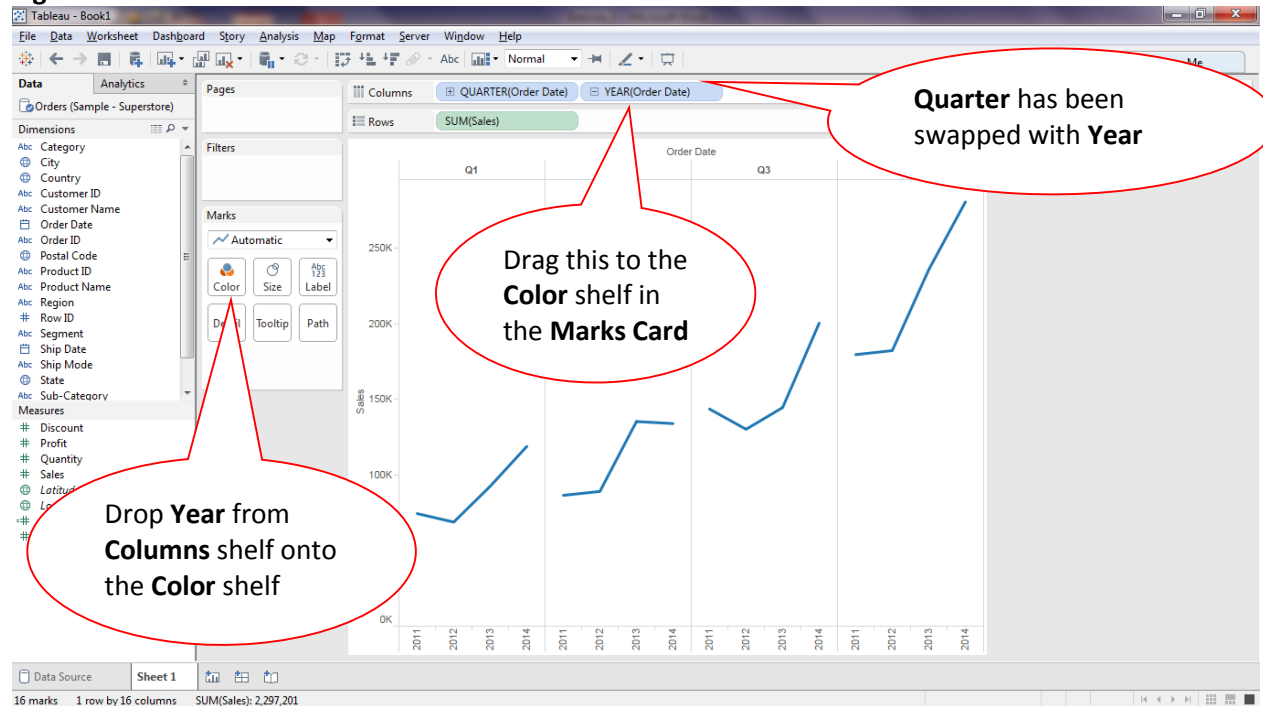
Figure 5

On Figure 5, both quarters and years are in the displayed view. To analyze the performance over various quarters, swap **Quarter** with **Year** by:
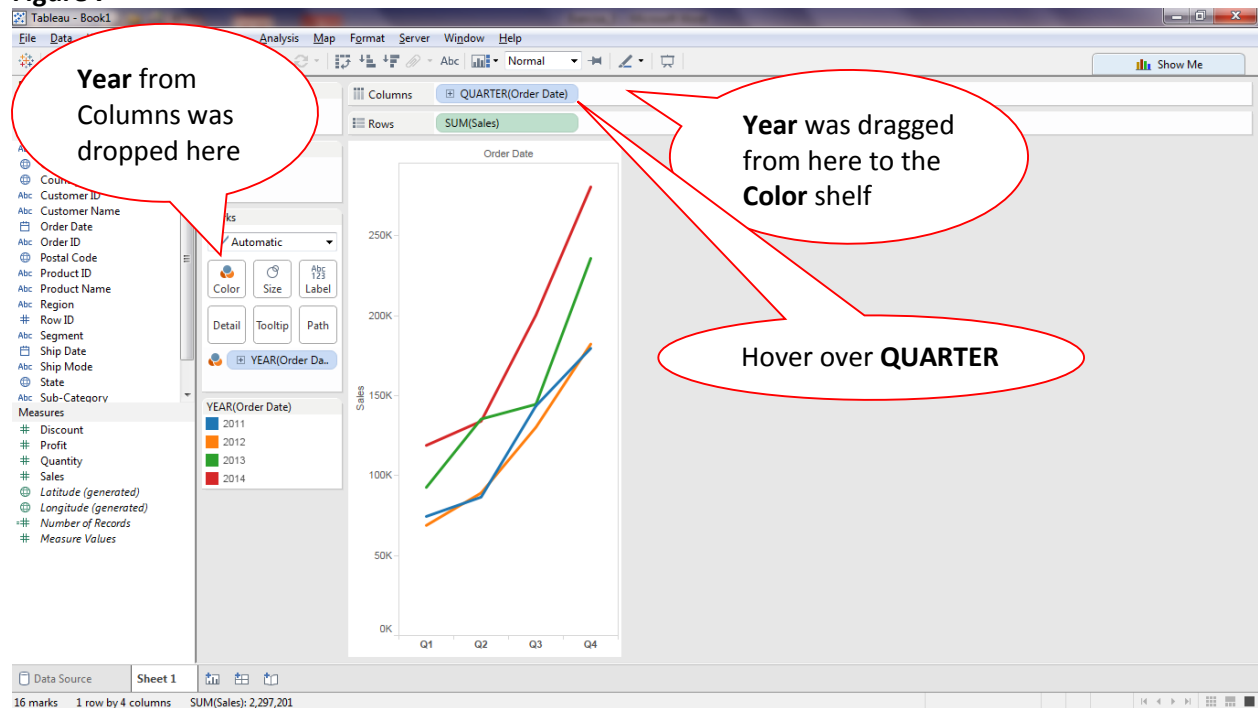
- Dragging and dropping **QUARTER** to the left of **YEAR** on the **Columns** shelf, as shown on Figure 5, which will lead to the display shown on Figure 6

Figure 6

- Drag and drop **Year** from the **Columns** shelf onto the **Color** shelf in the **Marks Card**, as shown on Figure 6, which will lead to the display shown on Figure 7
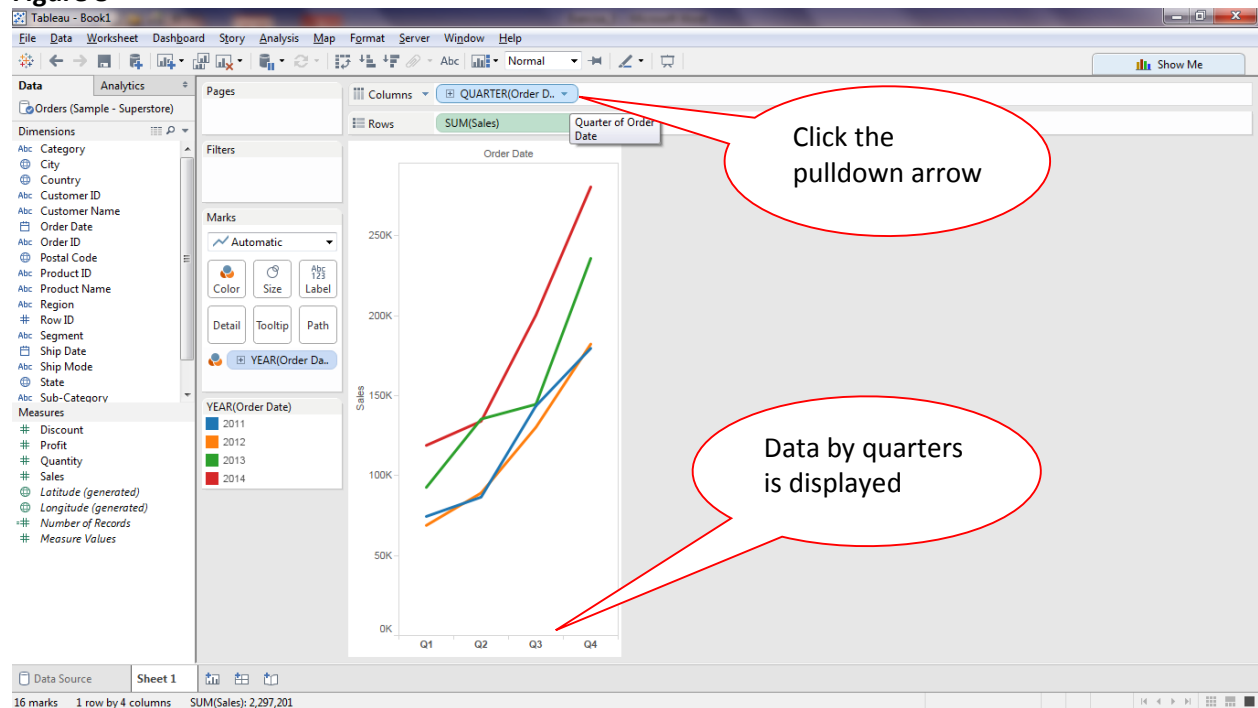
Figure 7

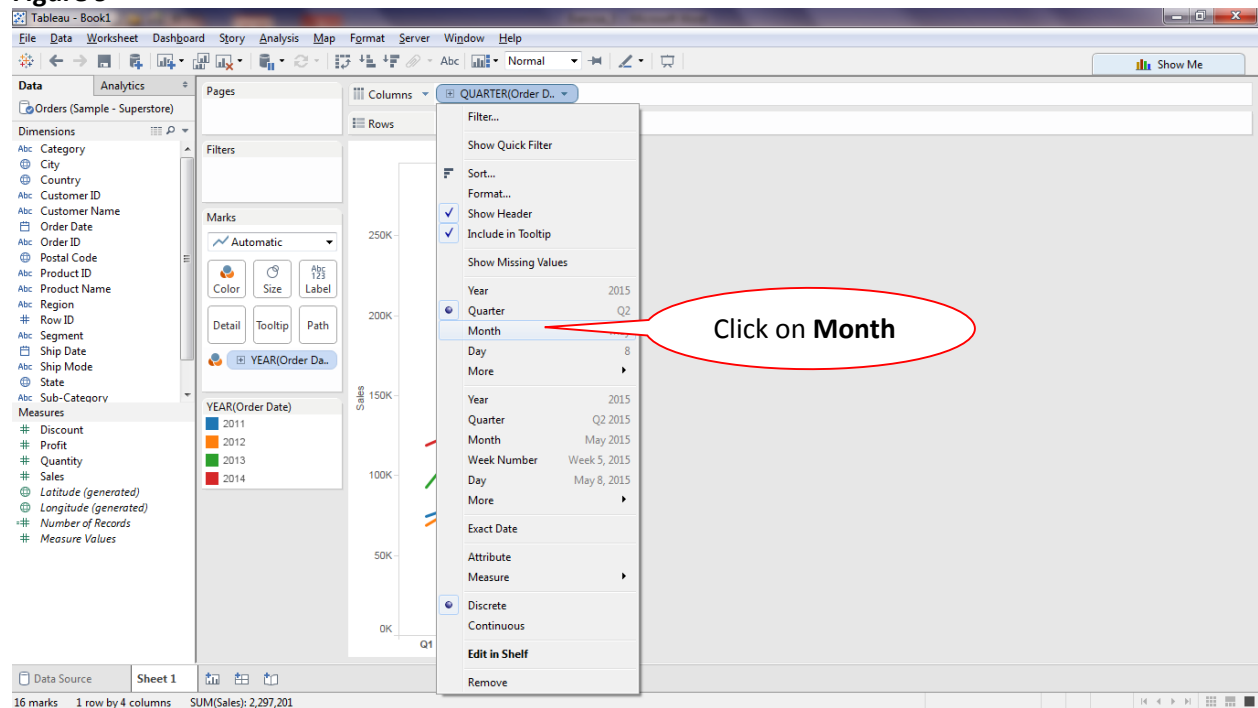To change the display from **Quarters** to **Months**:

- Hover over **Quarter** in the **Columns** shelf as shown on Figure 7, which will display the pulldown arrow shown on Figure 8
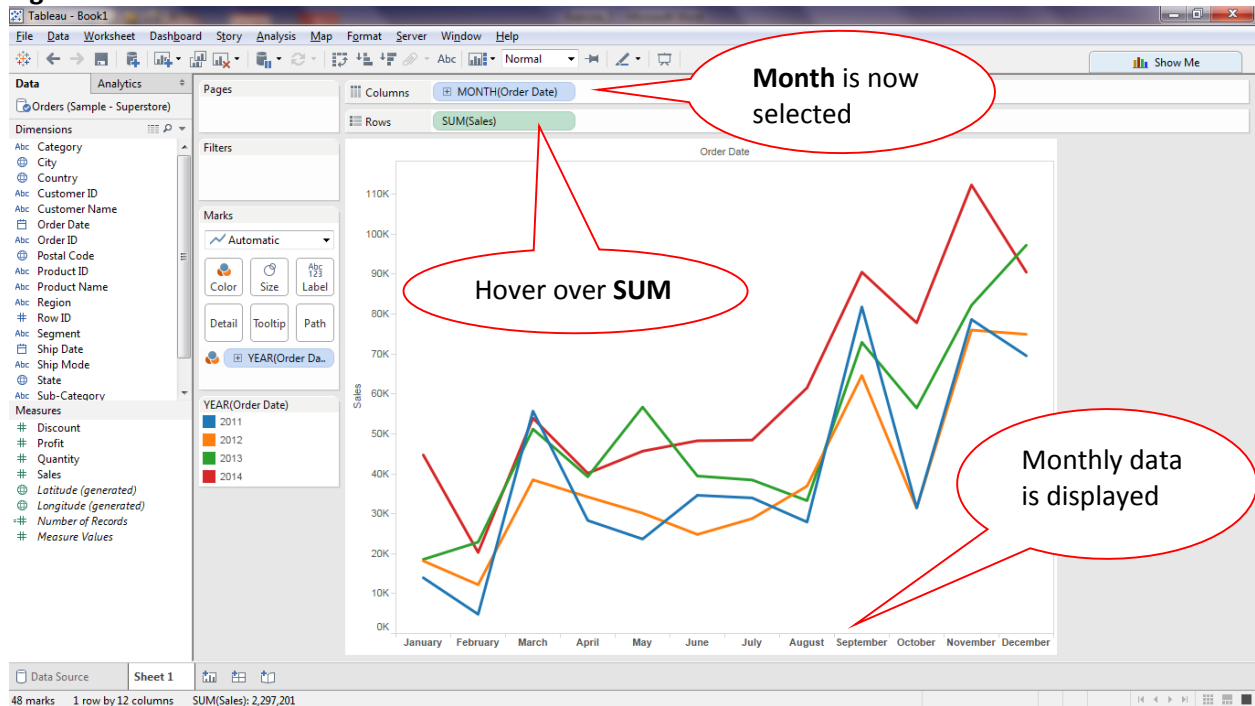
Figure 8

- Click the pulldown arrow displayed on Figure 8, which will lead to the menu tree displayed on Figure 9

Figure 9

- Click the **Month** menu tree item as shown on Figure 9, which will lead to the display shown on Figure 10
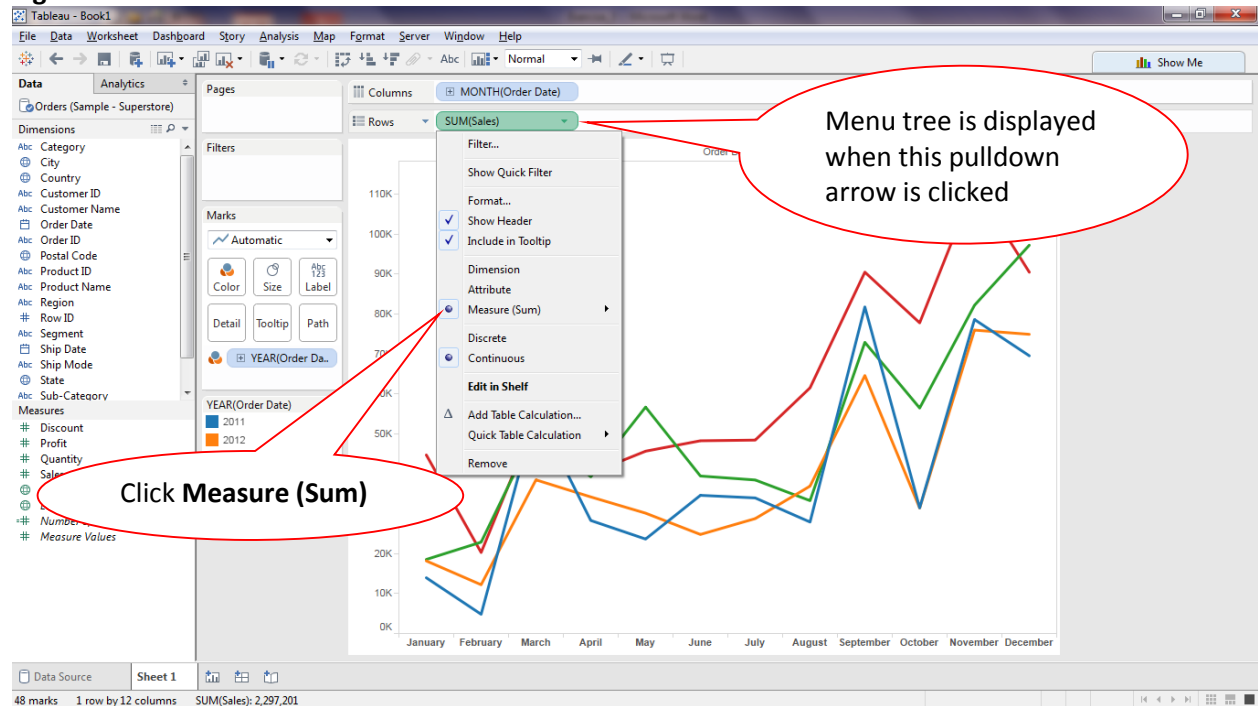
Figure 10

To analyze the **Average** of Sales instead of the **SUM** of Sales (which is shown on Figure 10):
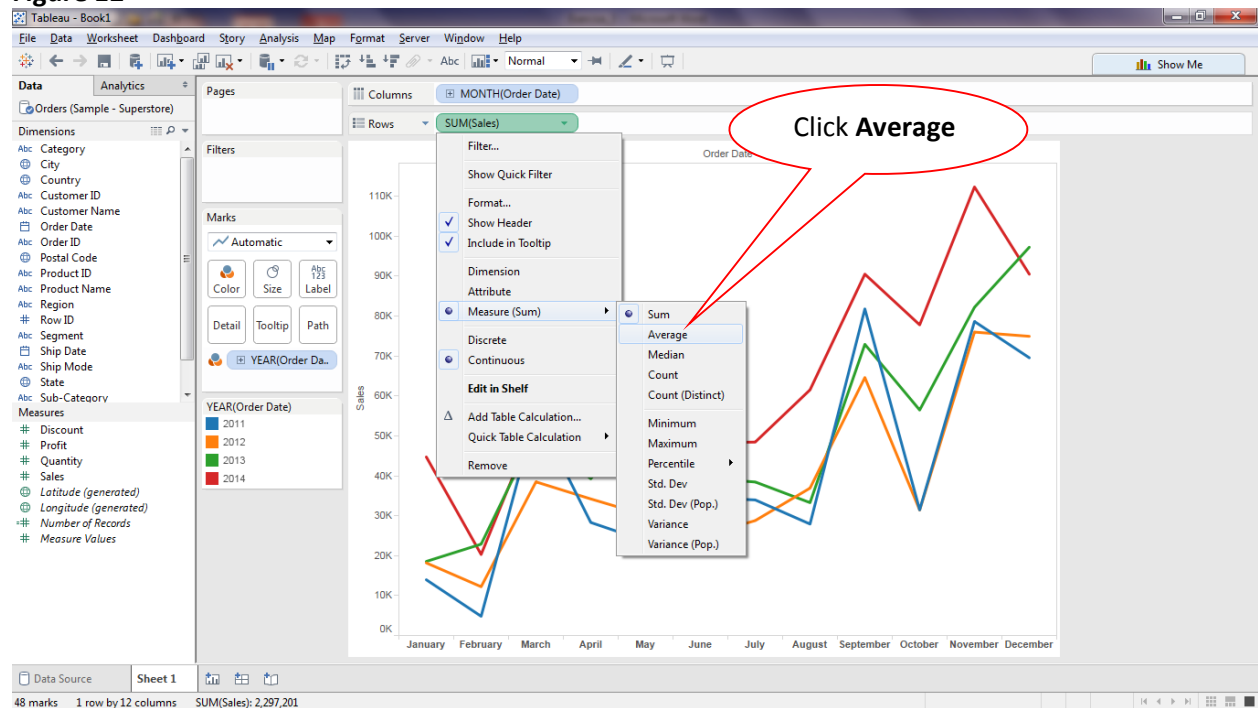- Hover over **SUM (Sales)** in the **Rows** shelf as shown on Figure 10, which will display a pulldown arrow
- Click the pulldown arrow when it is displayed, which will lead to the menu tree displayed on Figure 11
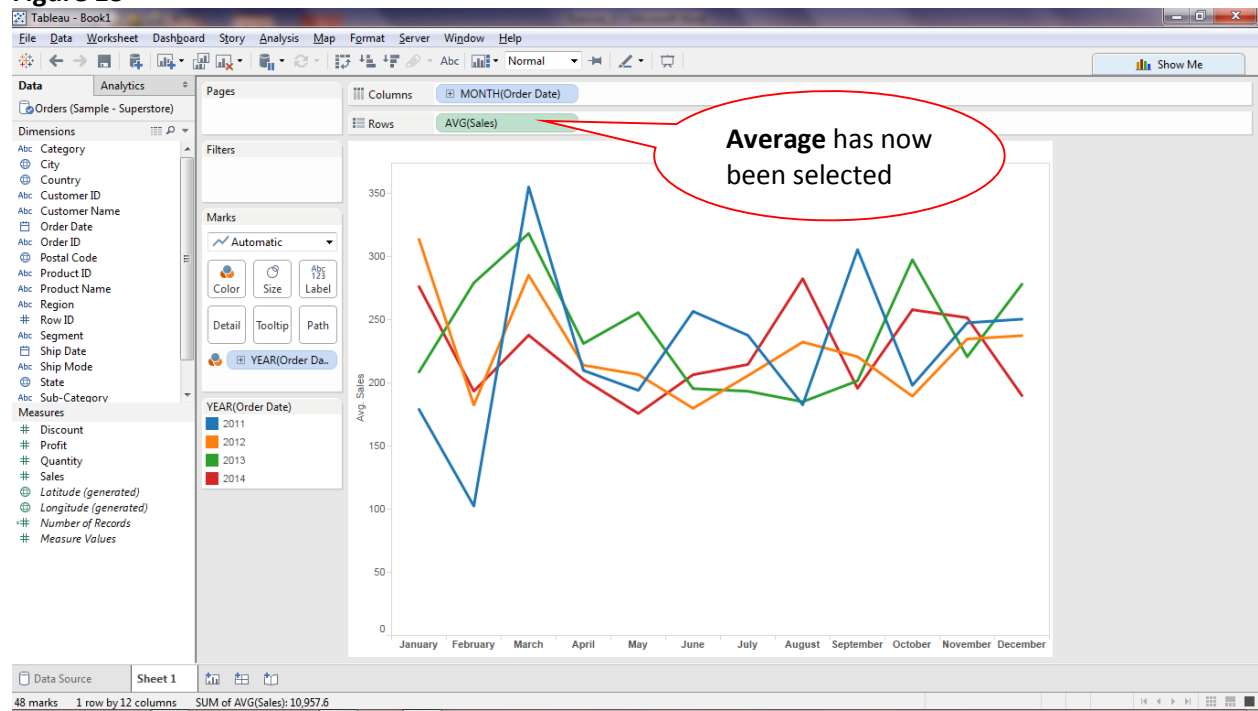
Figure 11

- Click the menu tree item **Measure (Sum)** as shown on Figure 11, which will lead to the secondary menu tree displayed on Figure 12

Figure 12

- Click the menu tree item **Average** as shown on Figure 12, which will lead to the display shown on Figure 13
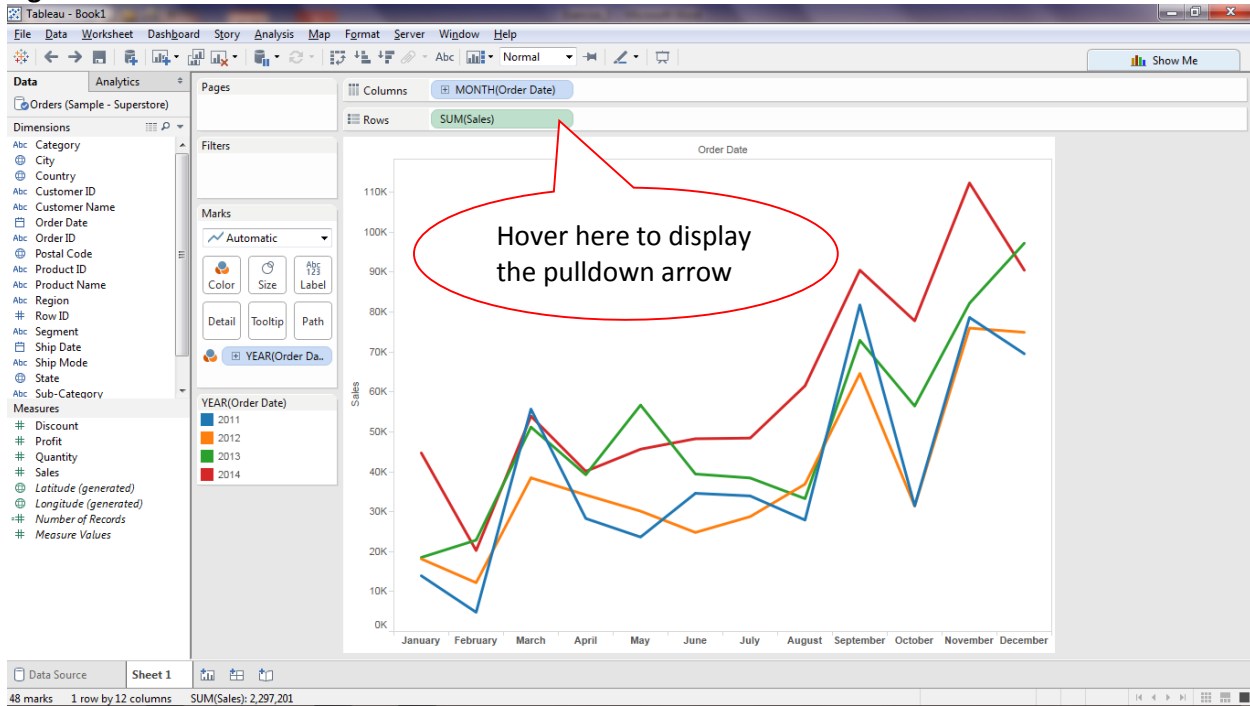
Figure 13

To analyze year-over-year growth, we will start with Figure 14 (which is the same as Figure 10). This visualization is based on:
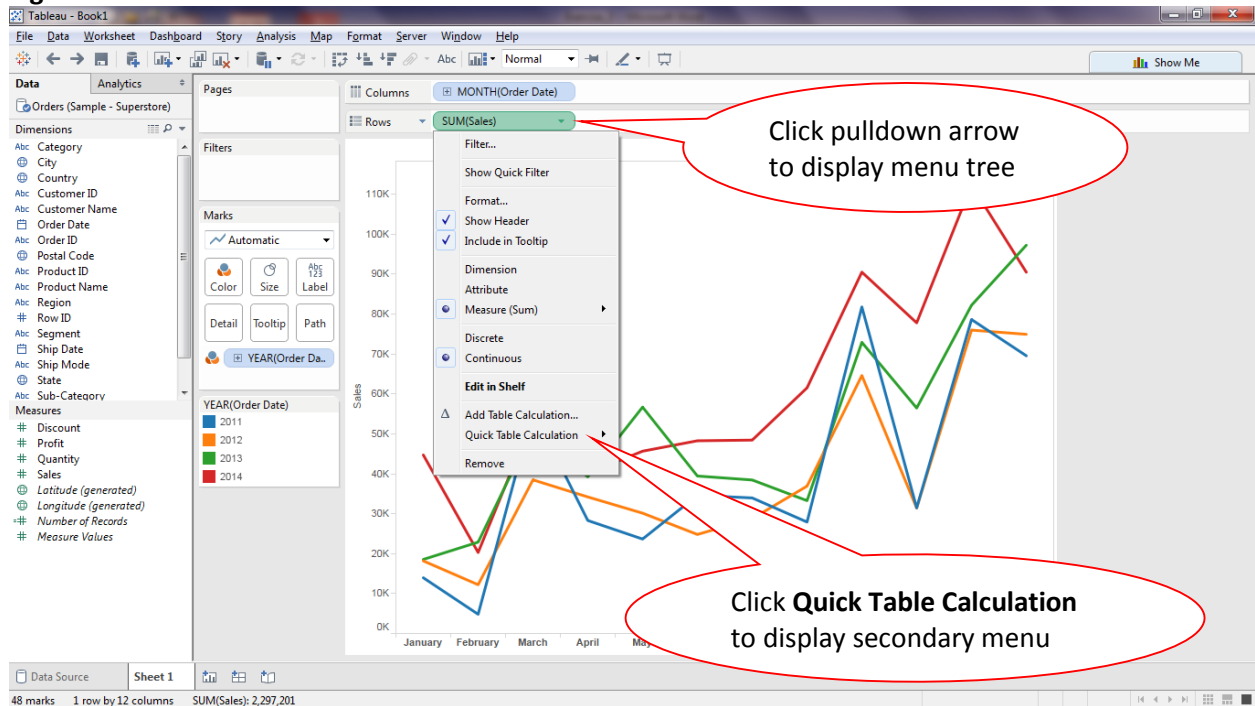
- Row: Month (Order Date)
- Column: SUM(Sales)

Figure 14

- Hover over **SUM (Sales)** in the **Rows** shelf as shown on Figure 14, which will display a pulldown arrow (shown on Figure 15)
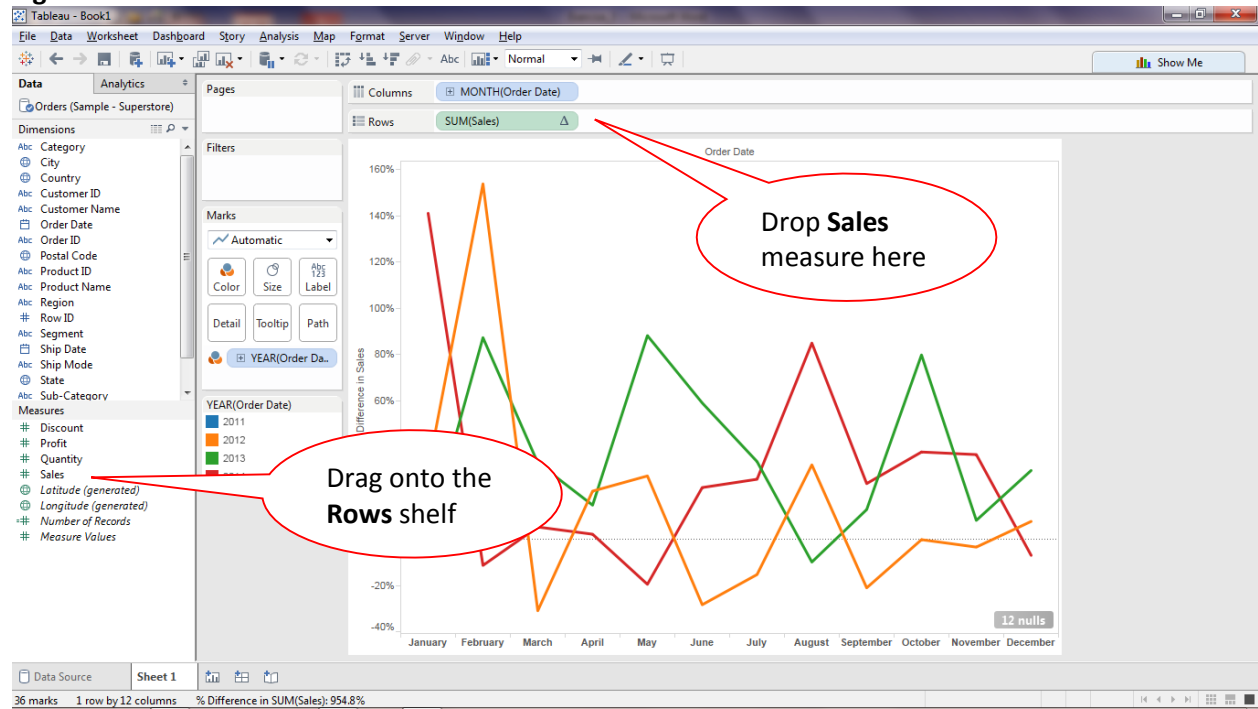- Click the pulldown arrow when it is displayed, which will lead to the menu tree displayed on Figure 15

Figure 15

- Click the menu tree item **Quick Table Calculation** as shown on Figure 15, which will lead to the secondary menu tree displayed on Figure 16

Figure 16

- Click on the menu tree item **Year over Year Growth** as shown on Figure 16, which will lead to the display shown on Figure 17
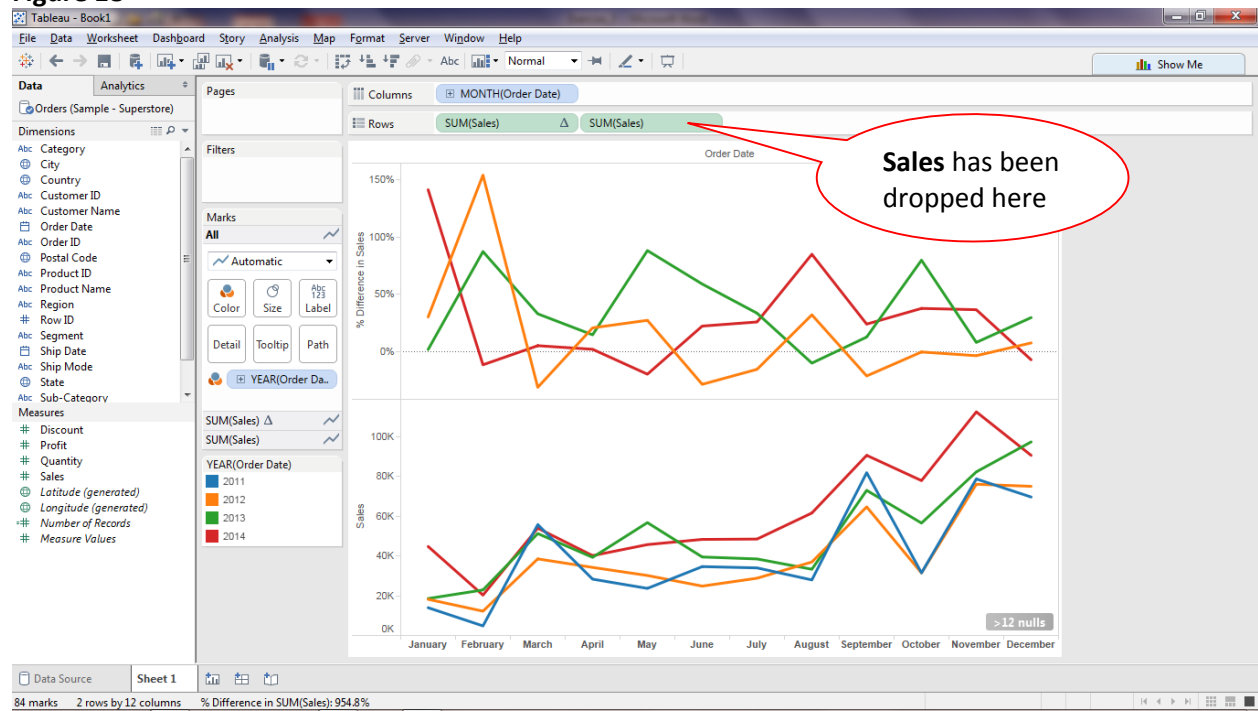
Figure 17

To display the original sales figures on the same chart:

- Drag and drop the **Sales** measure onto the **Rows** shelf as shown on Figure 17, which will lead to the display shown on Figure 18
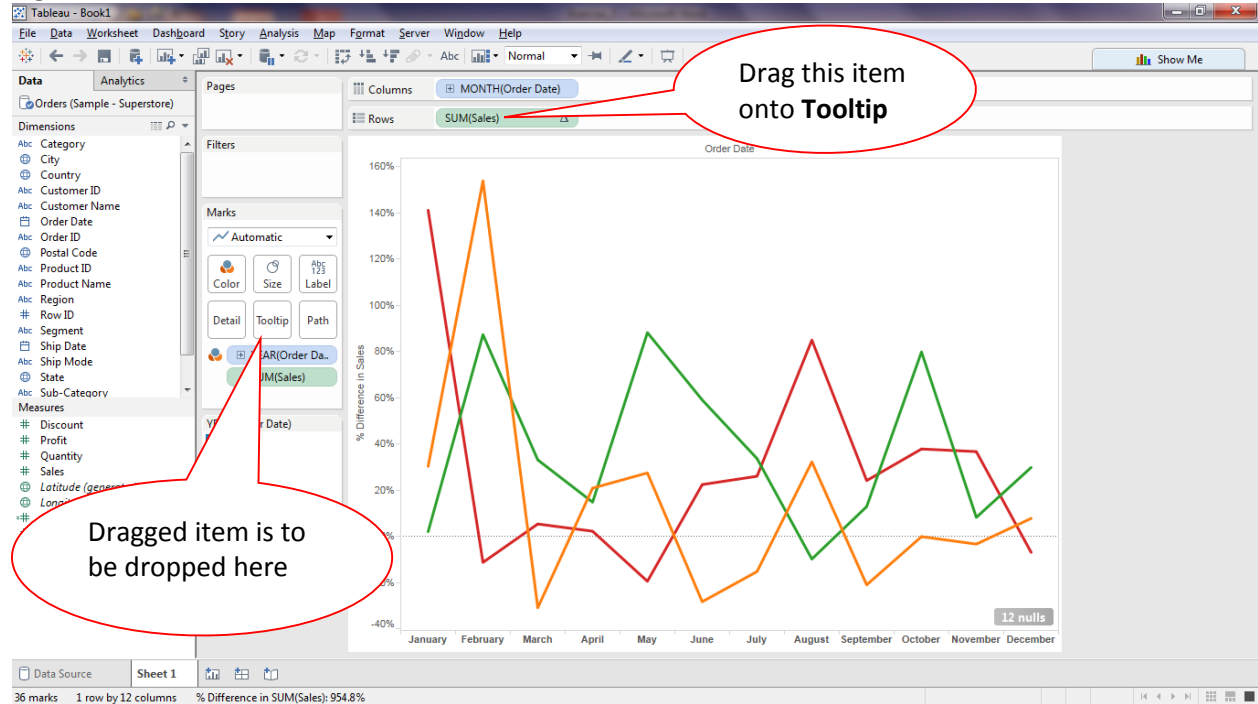
Figure 18

This figure now enables analysis to be made from two different perspectives (Sales and % Difference in Sales).

To enable values to be displayed when the cursor is placed over an item, i.e., enable hovering:
- Drag **SUM (Sales)** from the **Rows** shelf onto the **Tooltip** shelf (in the **Marks Card** area), as shown on Figure 19

Figure 19

- Hover over a line in the chart, which will cause its associated data to be displayed as shown on Figure 20

Figure 20