

## Lesson 02 Demo 05

### Tables

**Objective:** To demonstrate the process of creating tables in Tableau to visualize sales data across categories and regions

**Tools required:** Tableau Desktop

**Prerequisites:** None

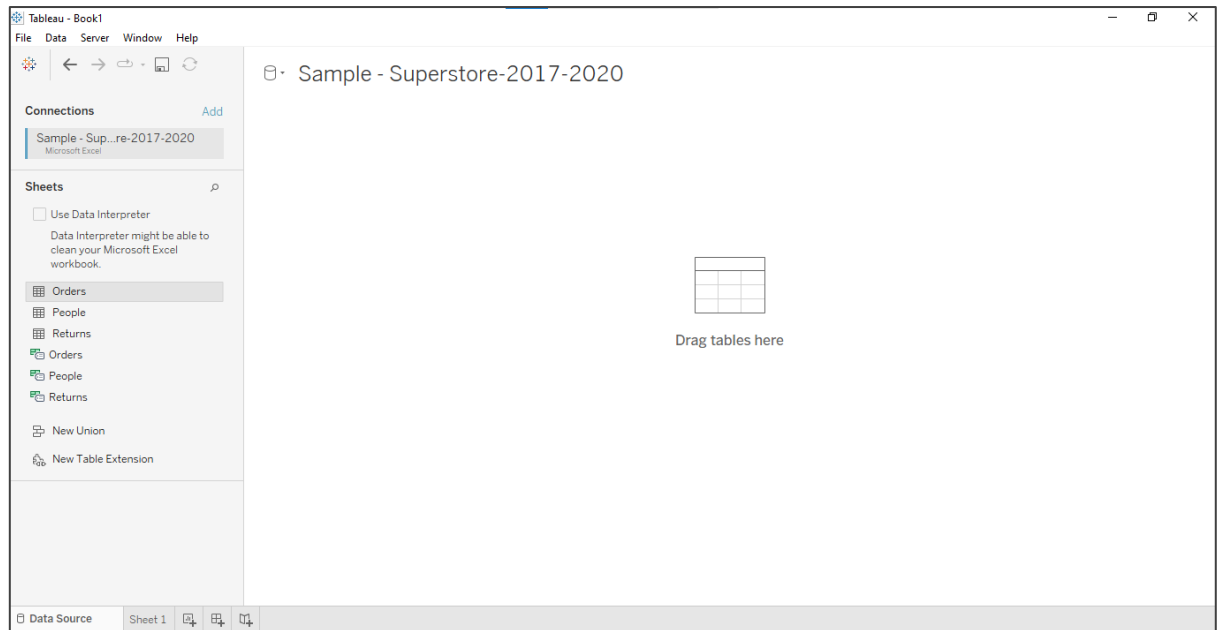
**Note:** Use the **Sample – Superstore** dataset from the Tableau Desktop

Steps to be followed:

1. Import the dataset
2. Create a table, a heat map and a highlight table
3. Convert the table into a highlight table
4. Create the highlight table manually

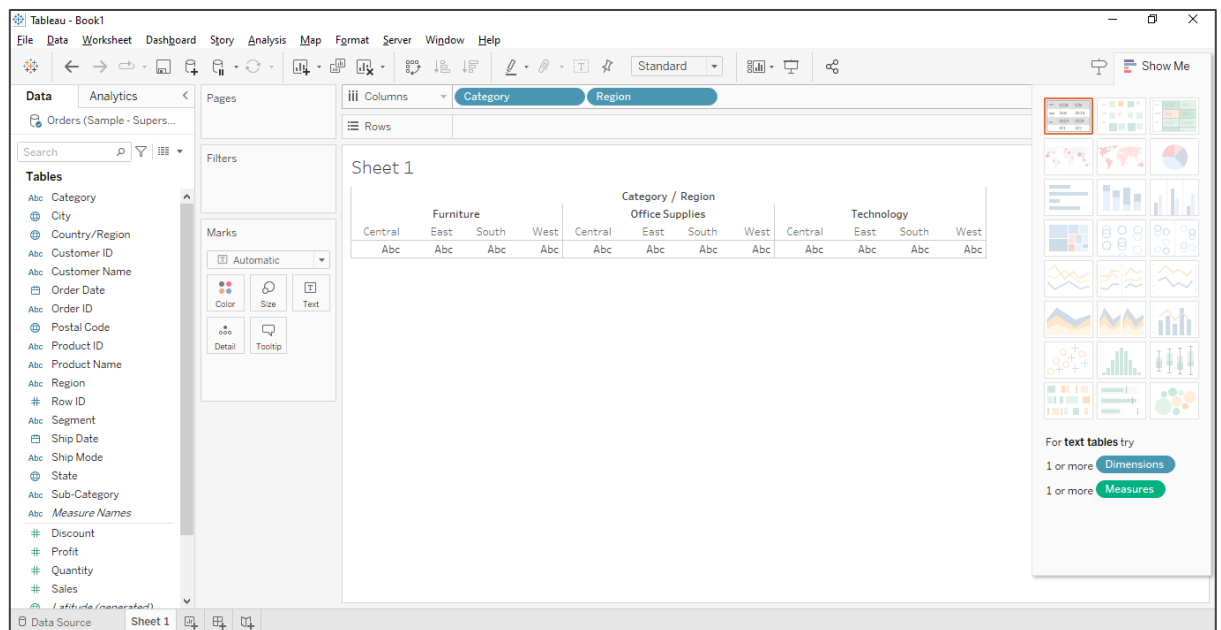
#### Step 1: Import the dataset

- 1.1 Navigate to the home page of Tableau Desktop and click on **Sample – Superstore**. Drag and drop the **Order** table into the blank space.

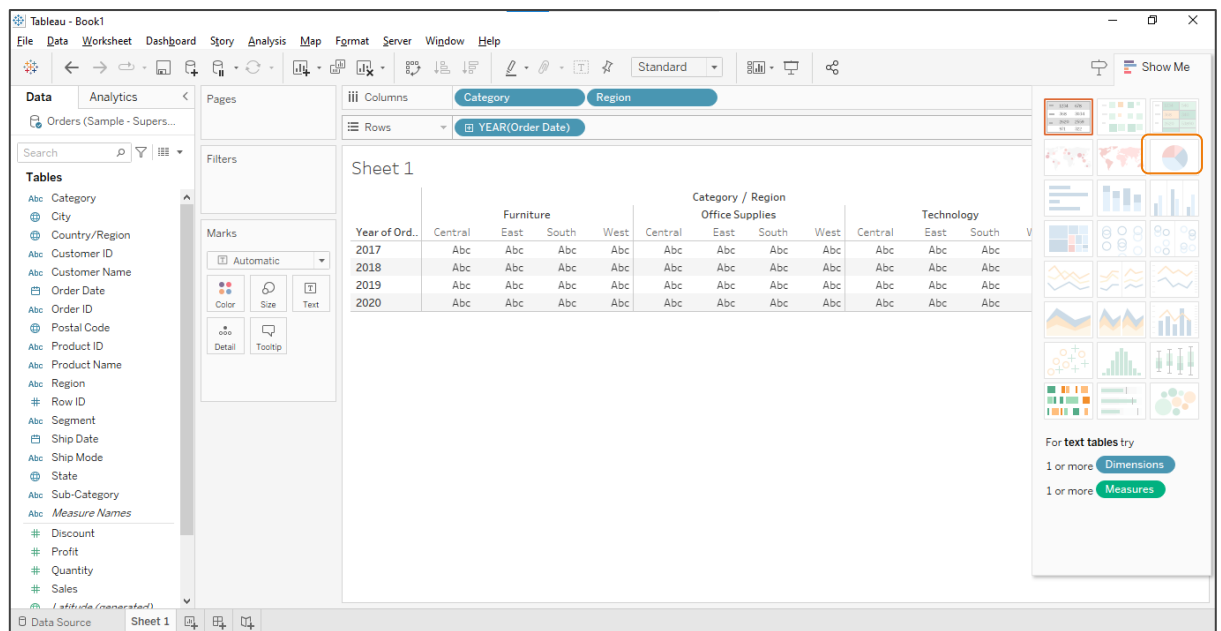


## Step 2: Create a table, a heat map, and a highlight table

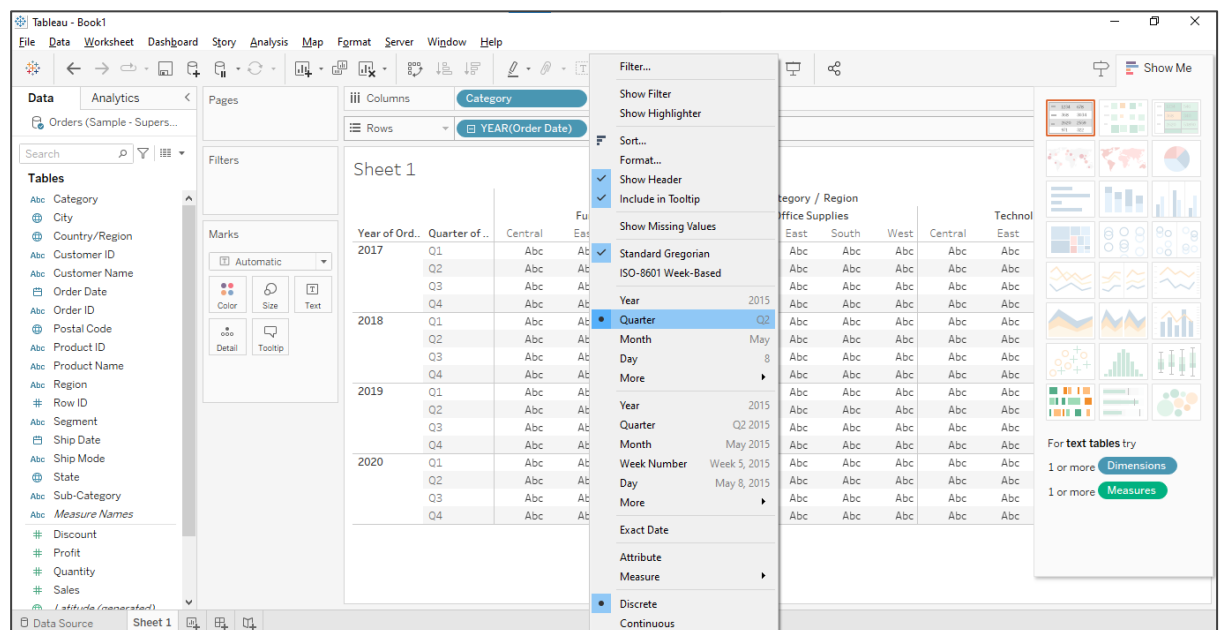
### 2.1 Drag **Category** and **Region** to **Columns**



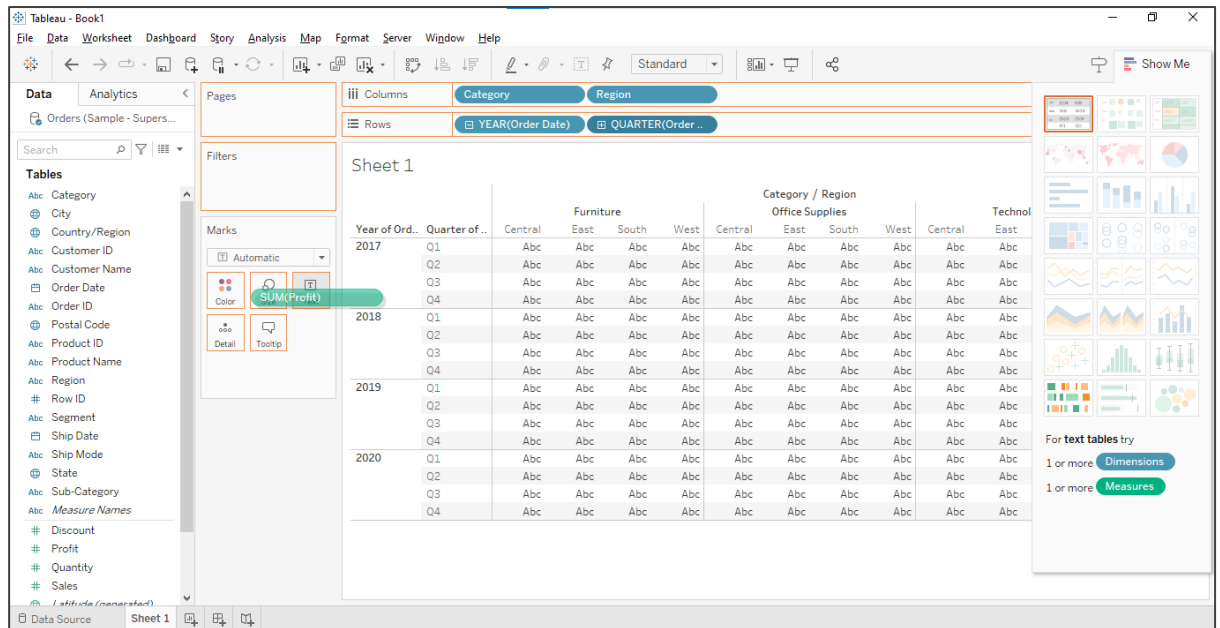
### 2.2 Drag **Order Date** to **Rows**



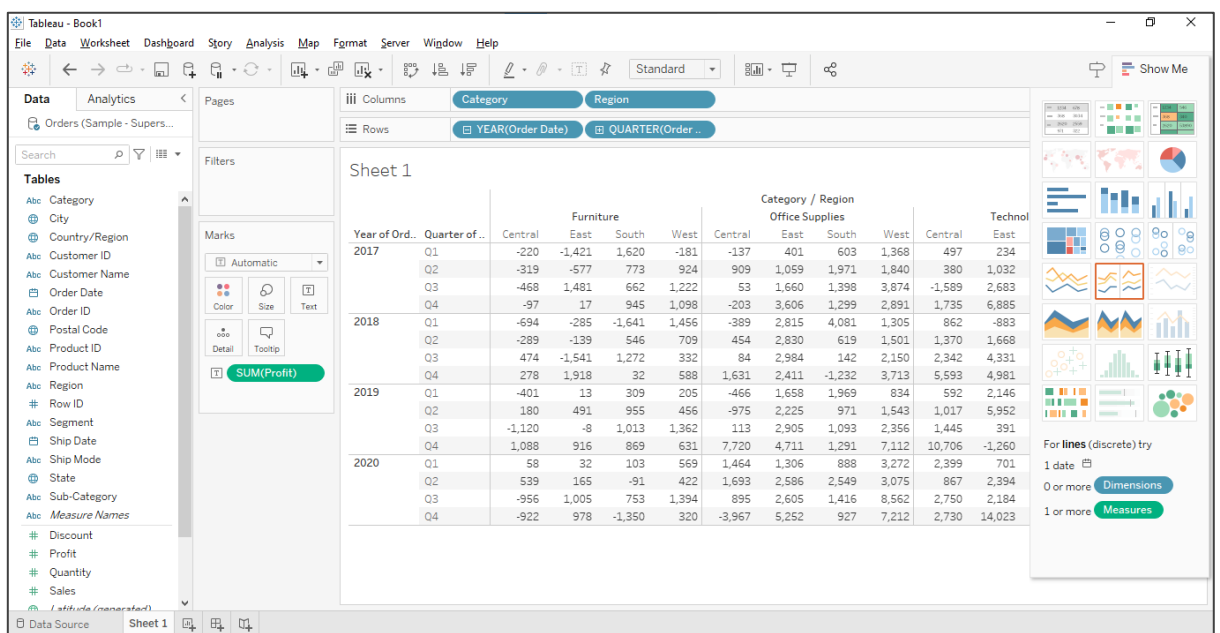
2.3 Again, drag **Order Date** to **Rows**, right-click on the **Order Date** and select **Quarter**



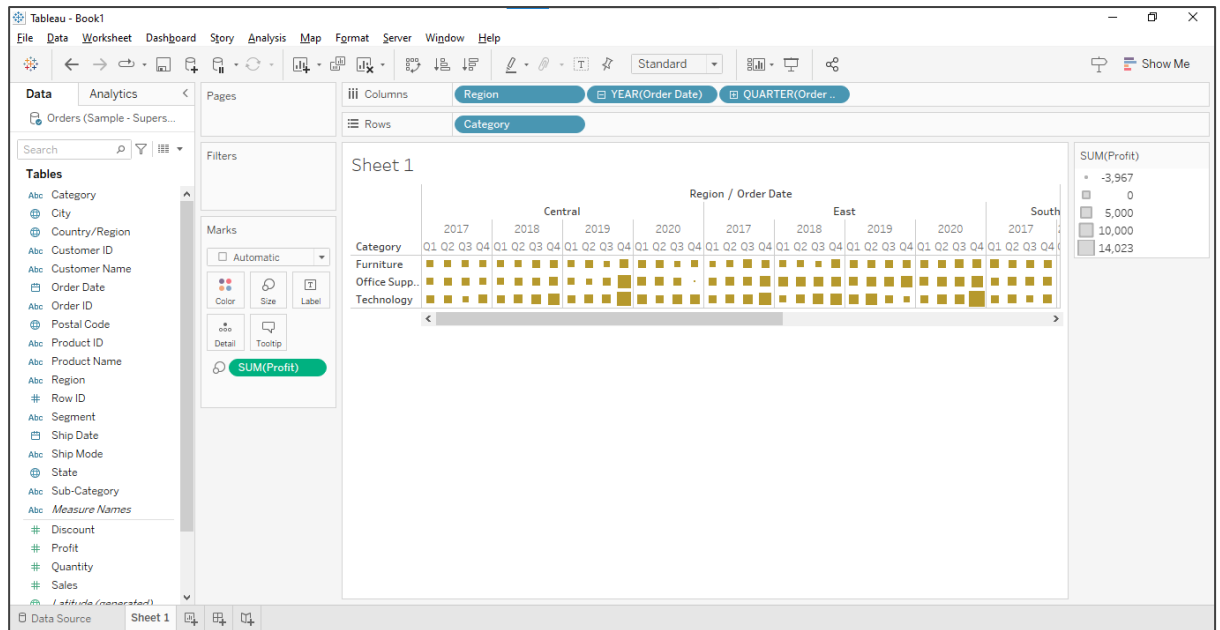
2.4 Drag **Profit** to **Text** marks



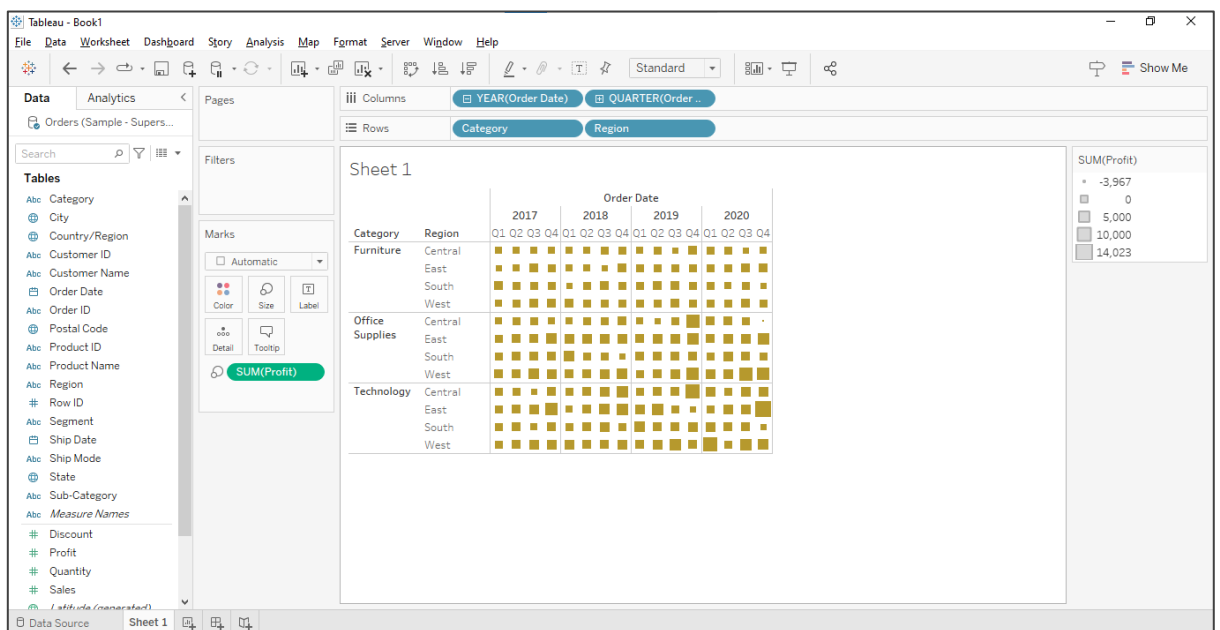
The text table is created as shown below:



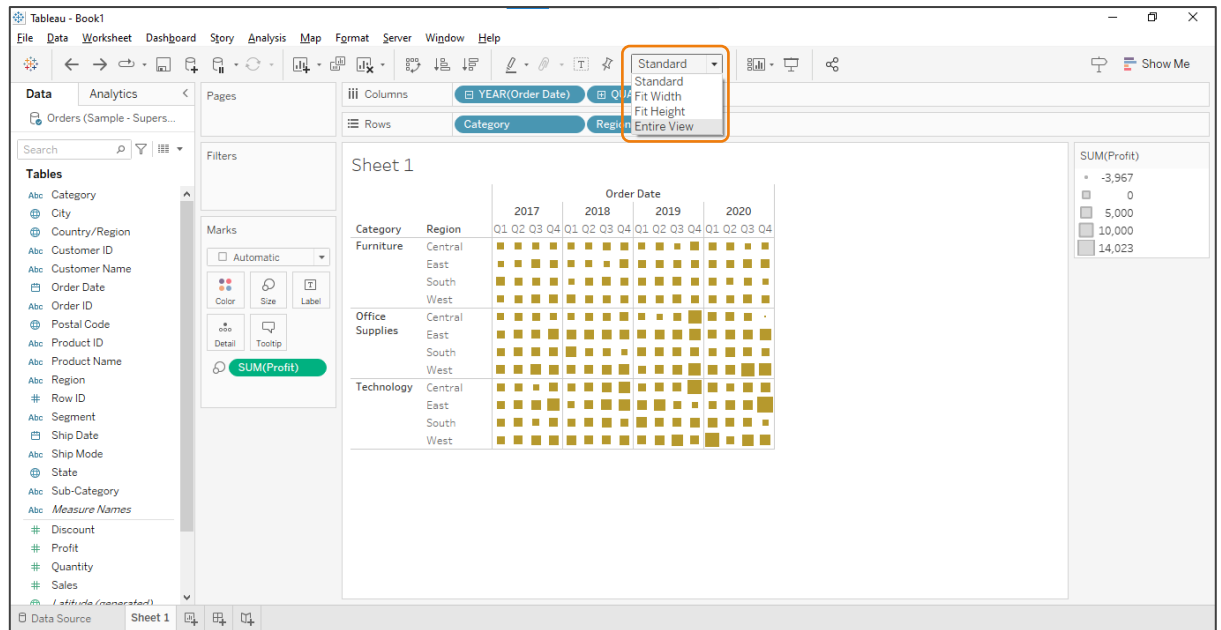
2.5 To convert table into a heat map, navigate to **Show Me** and select the second chart type that is, heat map. The heat map appears as shown below:



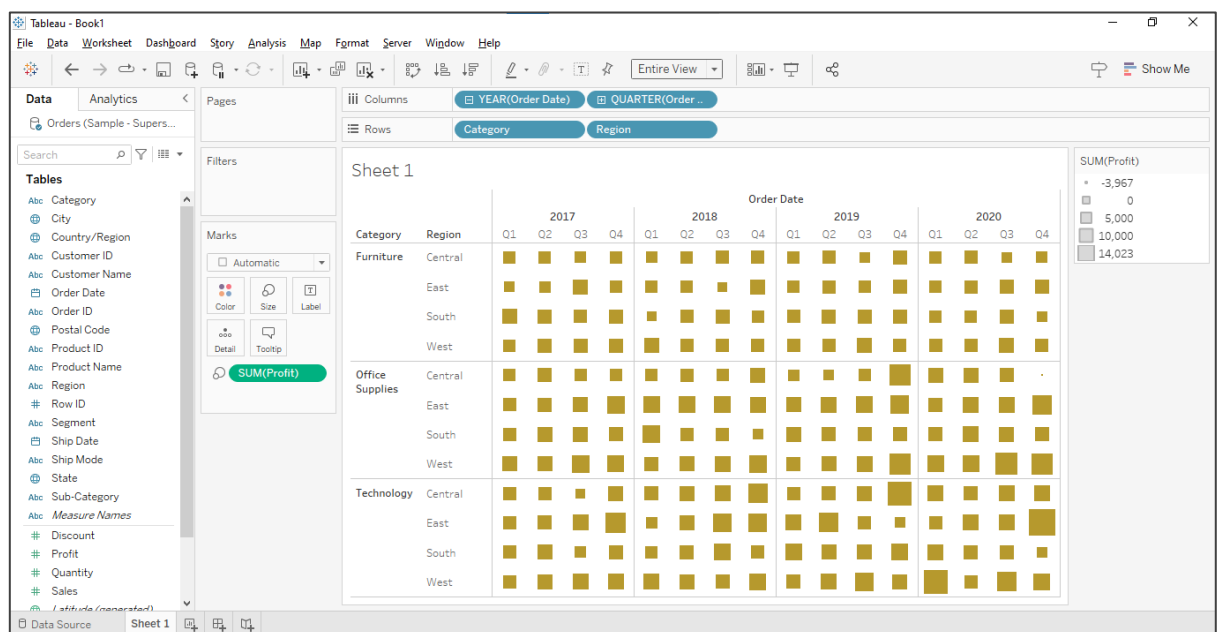
## 2.6 Bring **Region** (from **Columns**) to **Rows**



## 2.7 Select **Entire view** from the view type

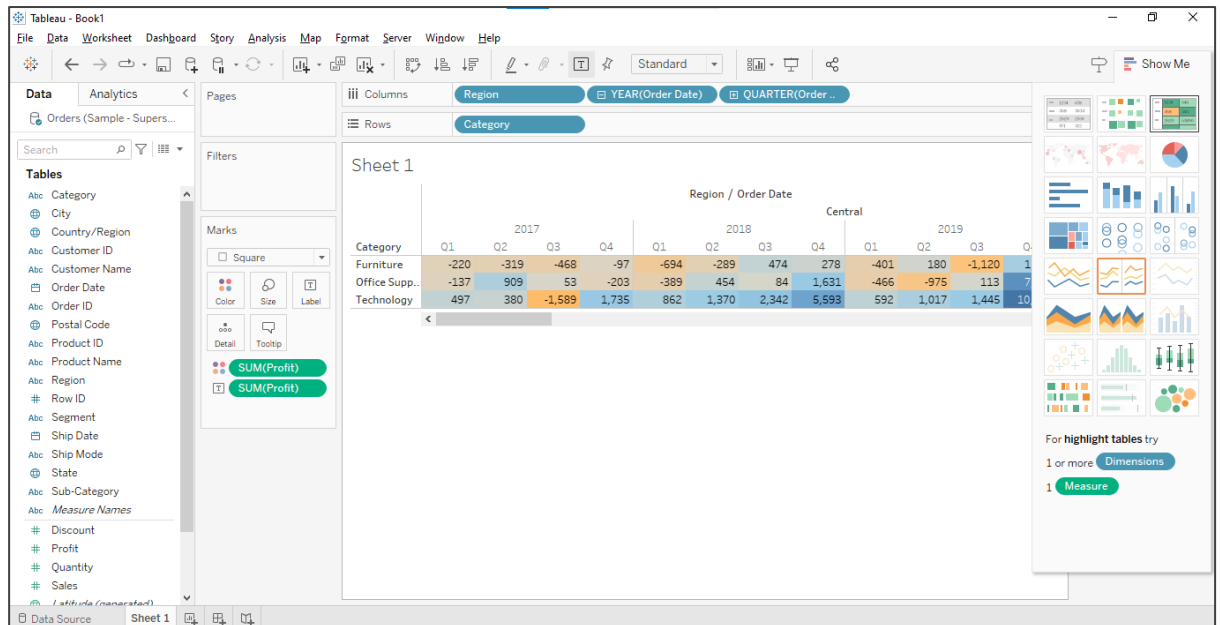


The chart now appears as shown below:



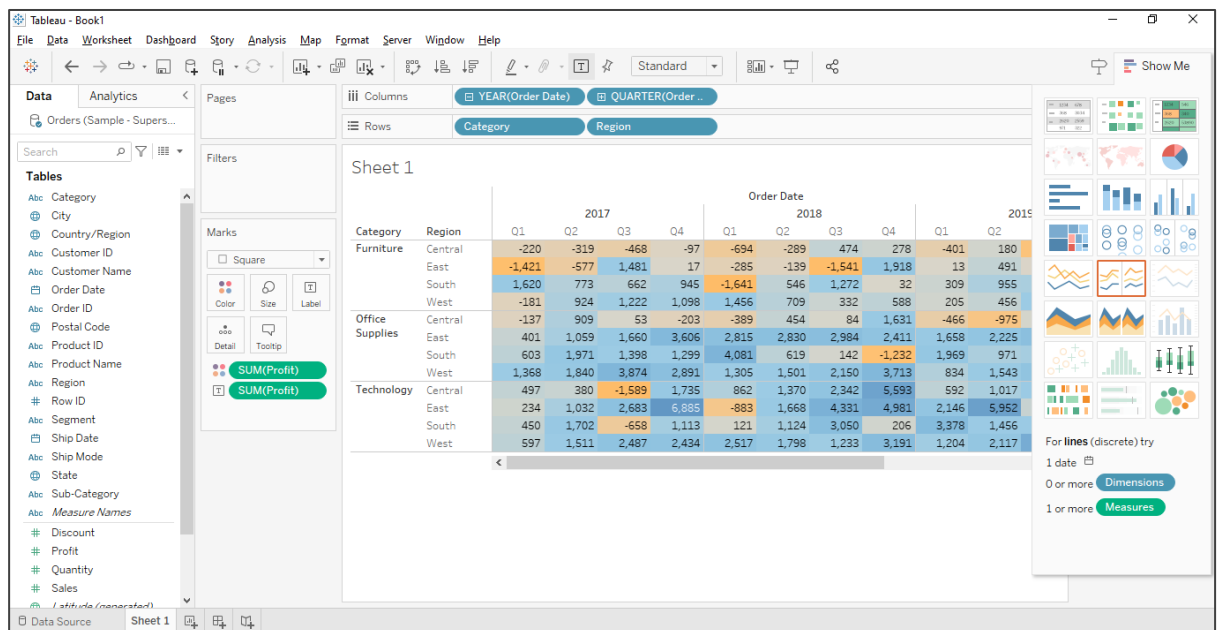
### Step 3: Convert the table into a highlight table

- 3.1 Go to **Show Me** and click on **highlight tables** (third chart type in first row)



3.2 Again, bring **Region** to **Rows**. Change view type to **Entire View**.

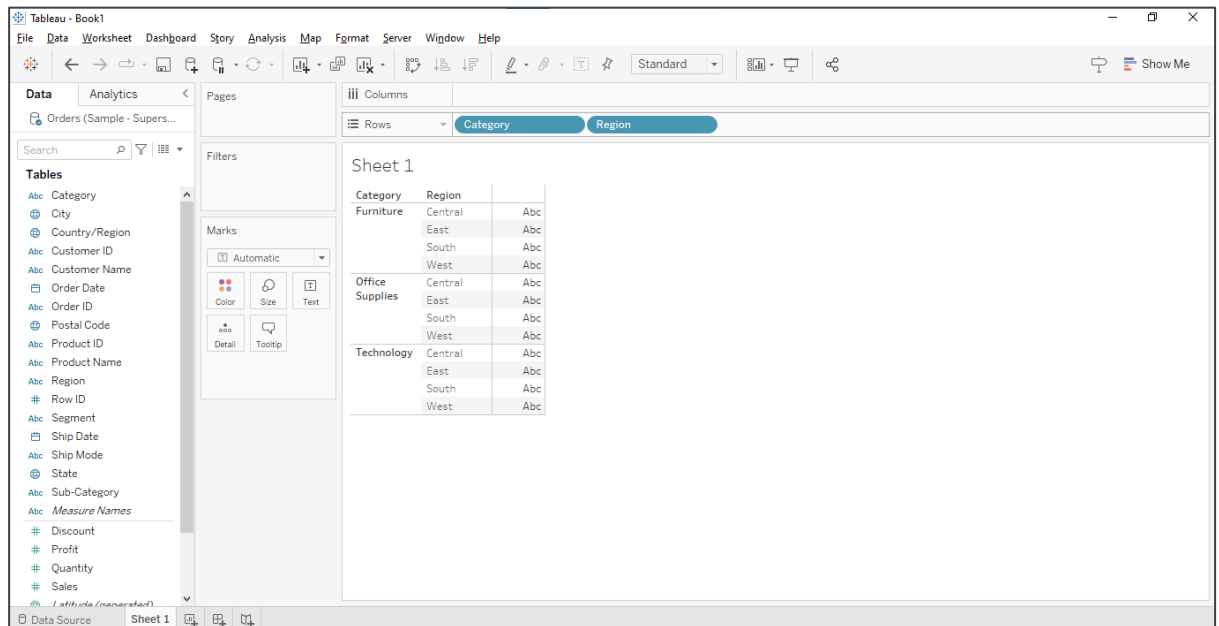
The chart appears as shown below:



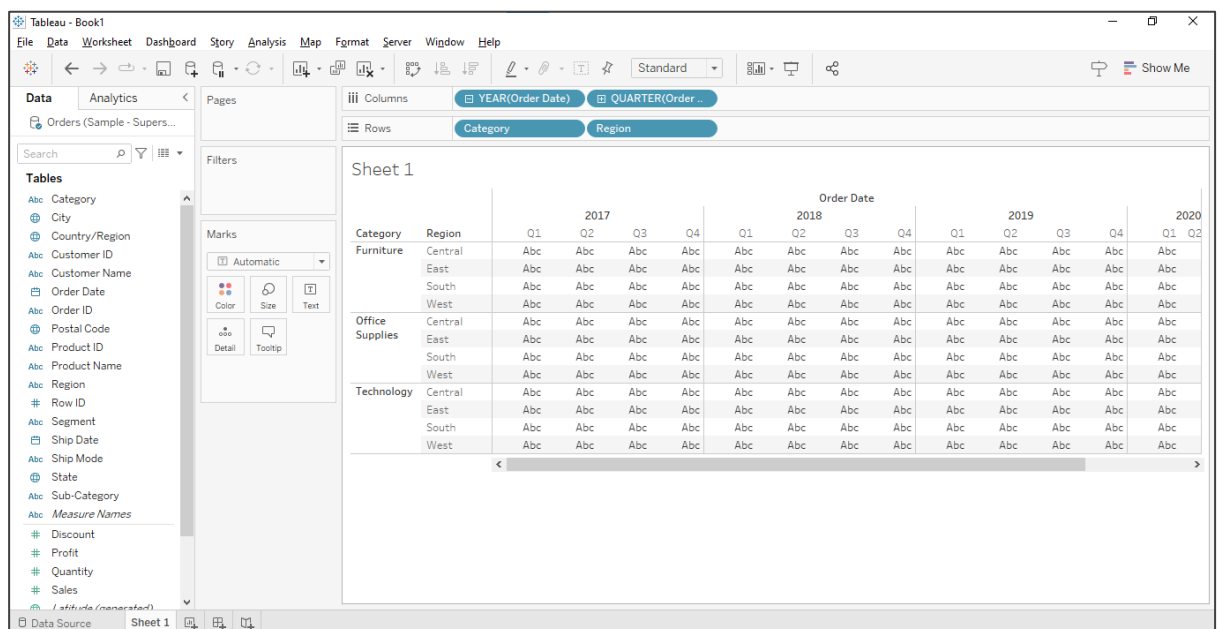
**Observation:** The highlight table uses colors in each cell, with darker shades for extreme values. Orange indicates losses, with darker shades representing higher losses, while blue represents profits, with darker shades indicating higher profits.

## Step 4: Create the highlight table manually

### 4.1 Drag **Category** and **Region** to **Rows**

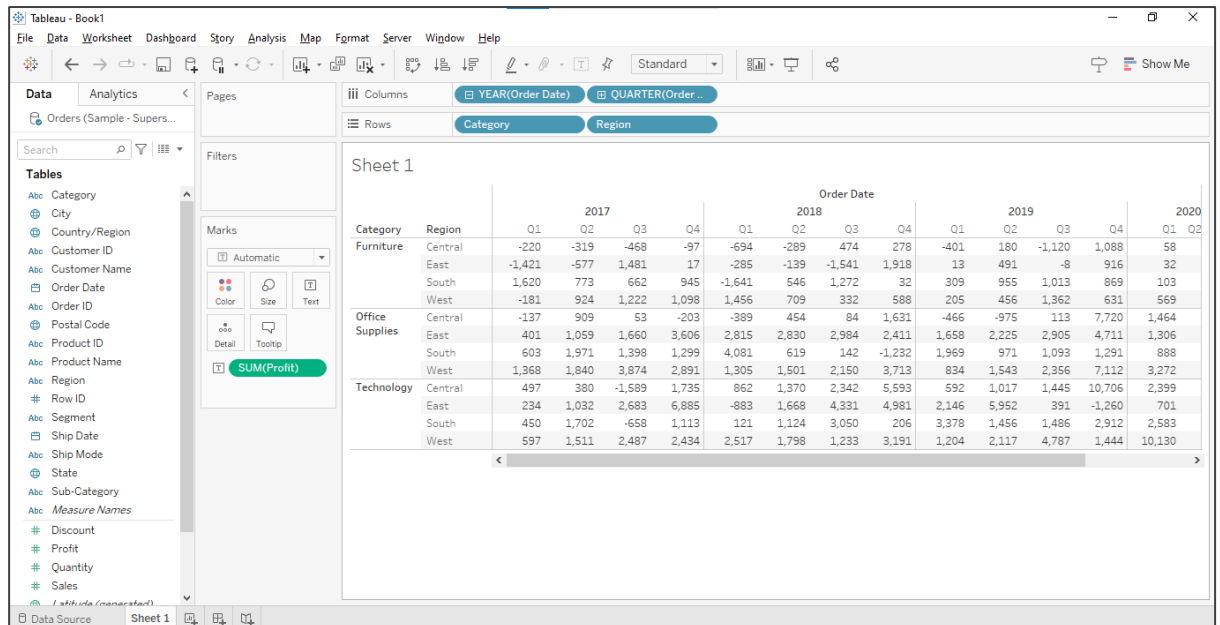


### 4.2 Drag **Order Date** to **Columns** and drill down to **Quarter** levels

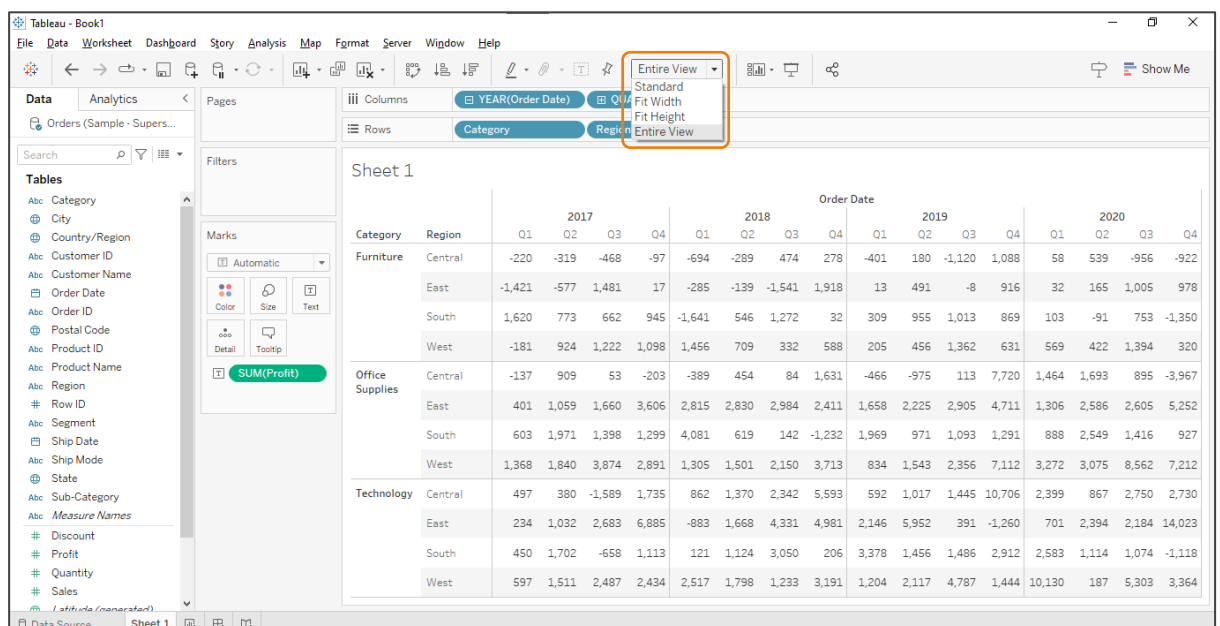


### 4.3 Bring **Profit** to **Text** Marks

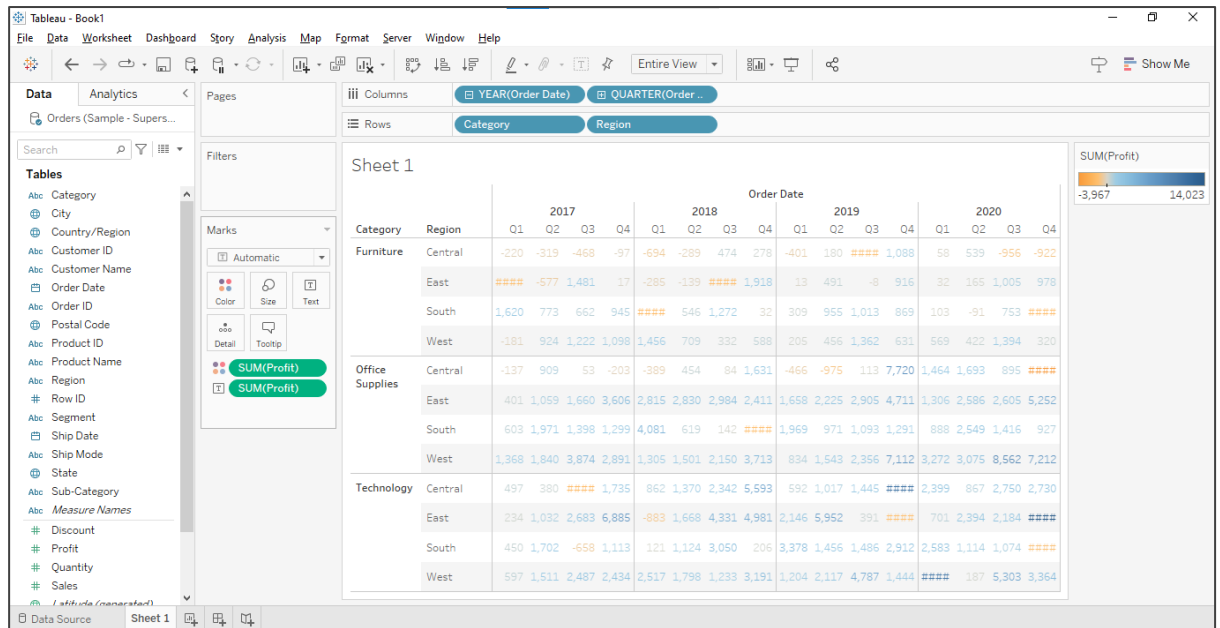




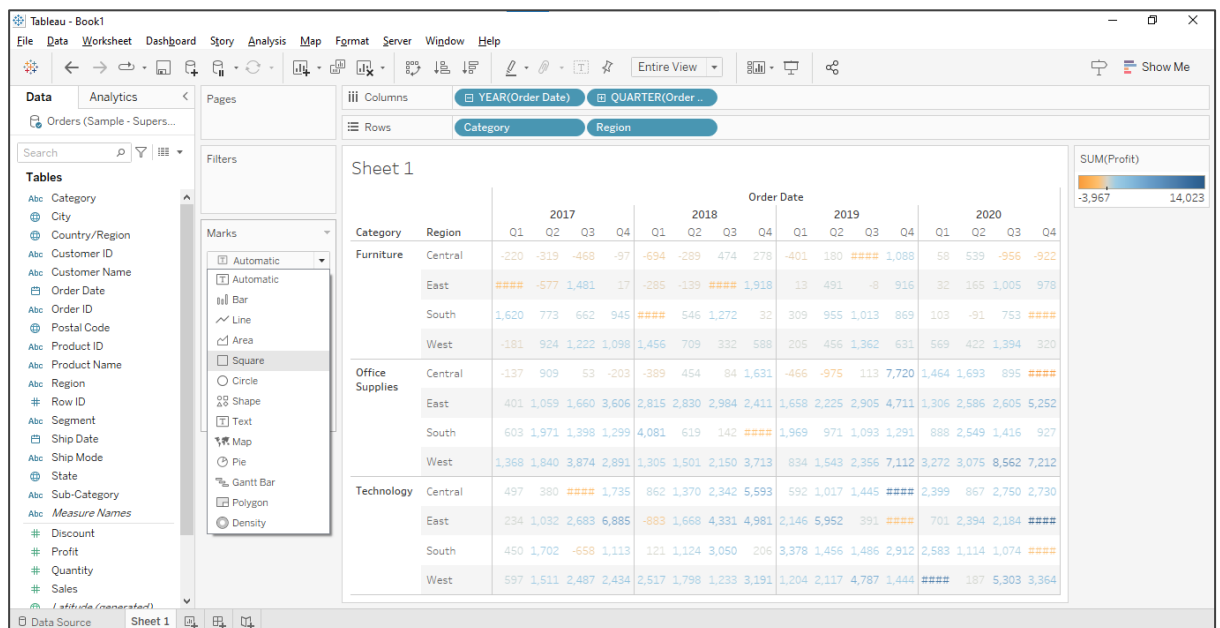
#### 4.4 Select Entire View



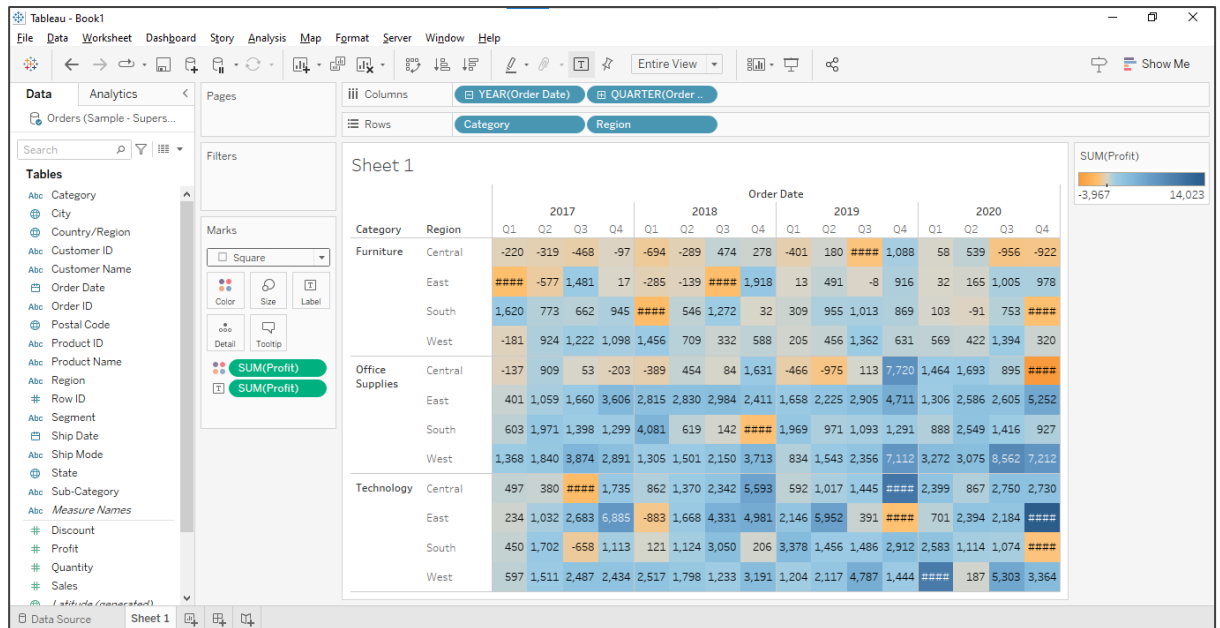
#### 4.5 Now, bring Profit on to Color Marks



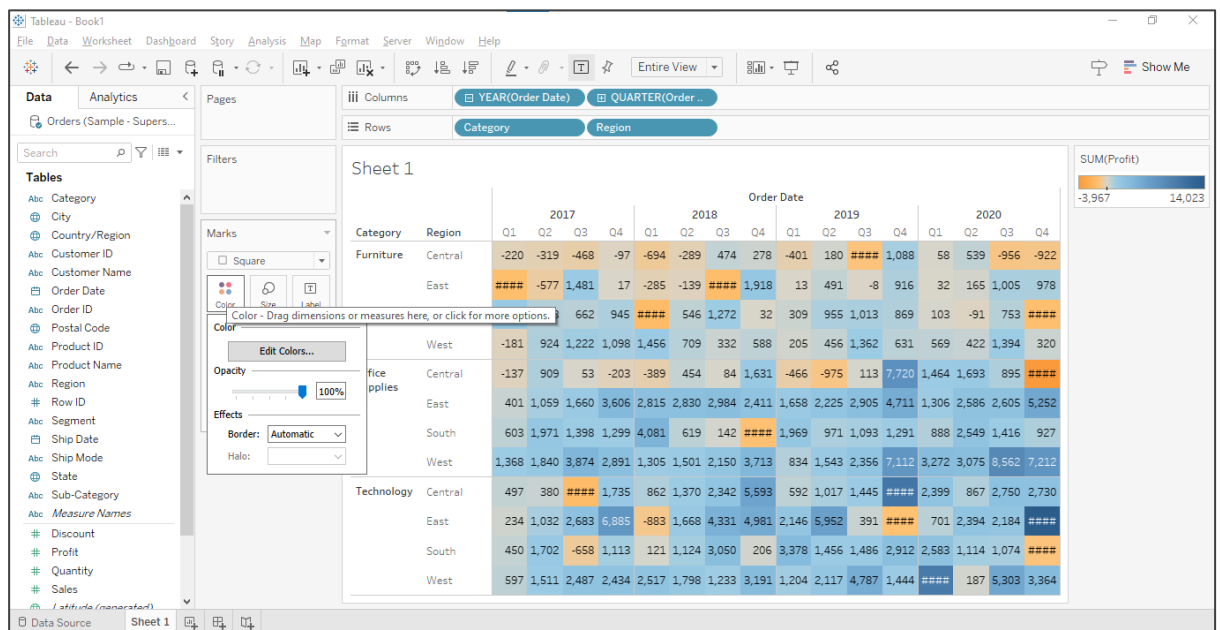
## 4.6 Change marks type to Square



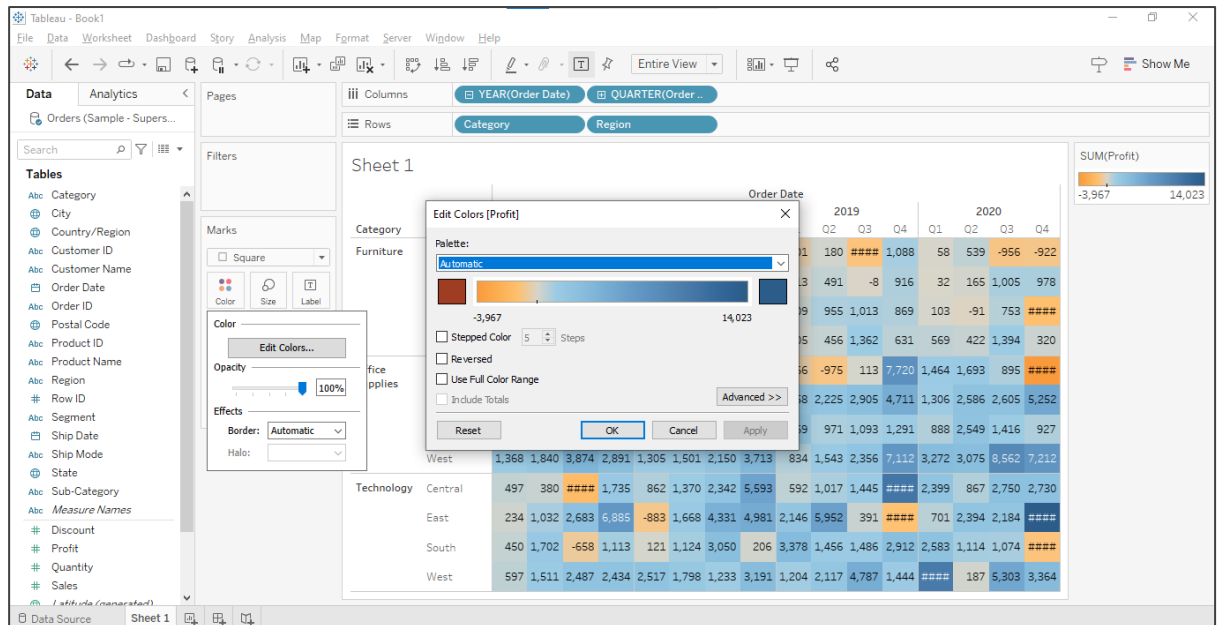
The highlight table is created as shown below:

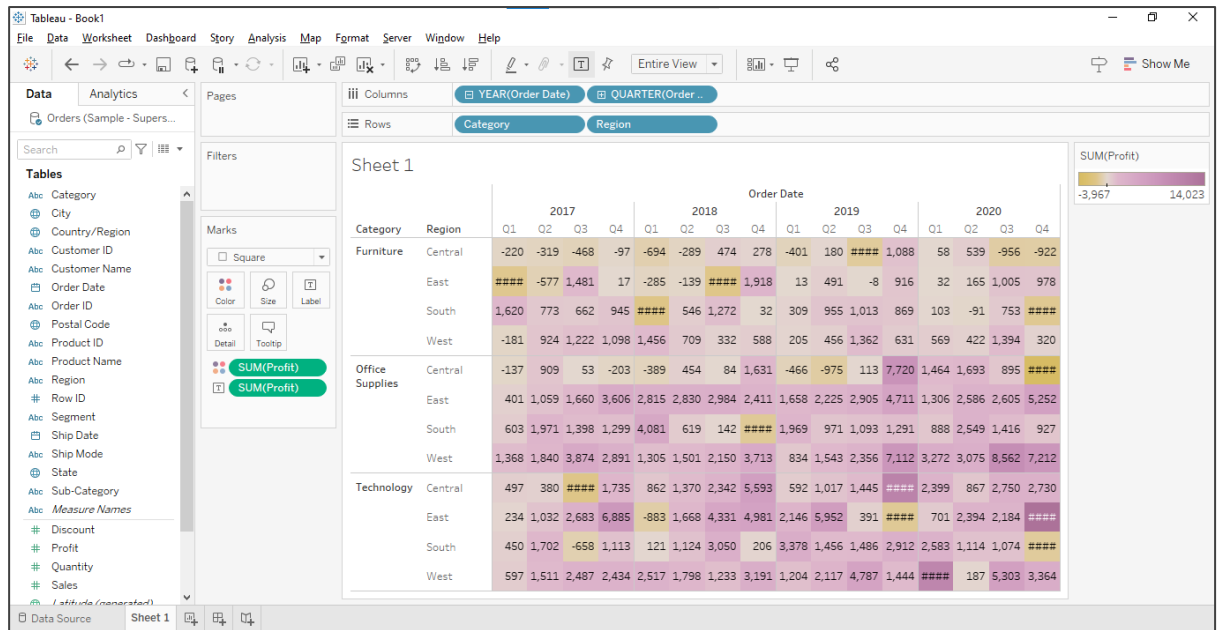


4.7 You can change the colors in the table by clicking on the **Color** marks and selecting **Edit Colors**



4.8 The **Edit Color** window opens. Click on the dropdown to select other colors from the palette.





With these steps, you have successfully transformed a basic text table into a heat map and highlight table, offering insights into profit and loss trends across categories and regions.