

Lesson 02 Demo 03

Line Chart

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

Tools required: Tableau Desktop

Prerequisites: None

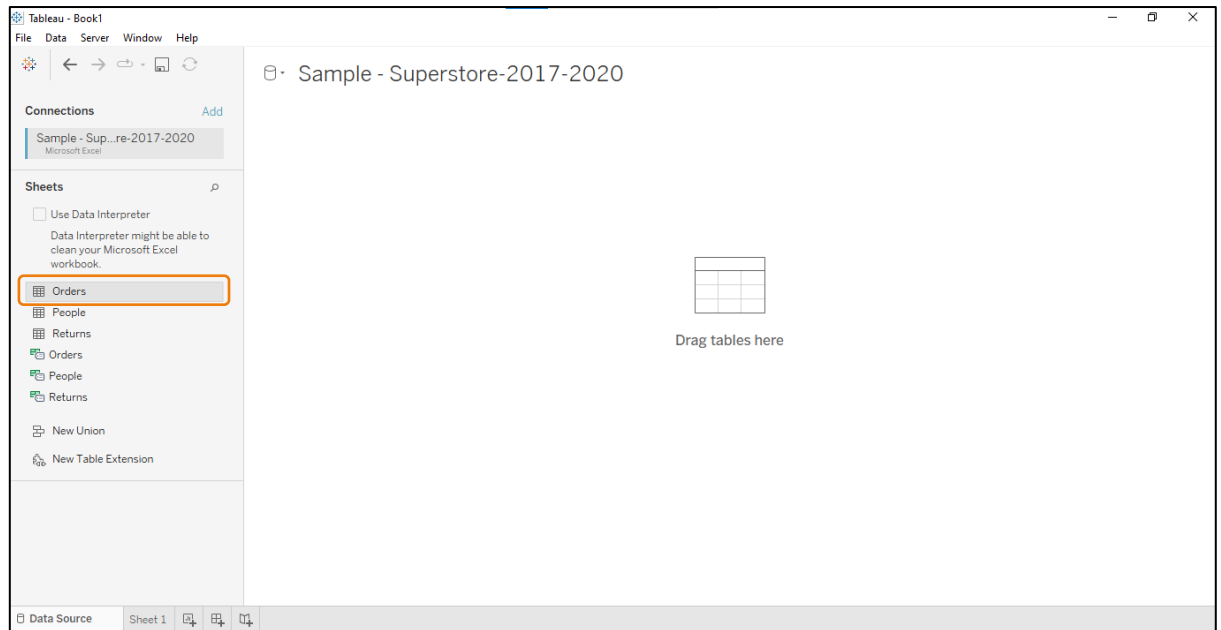
Note: Use the **Sample – Superstore** dataset from the Tableau Desktop

Steps to be followed:

1. Import the dataset
2. Create a line and bar chart
3. Create an area chart

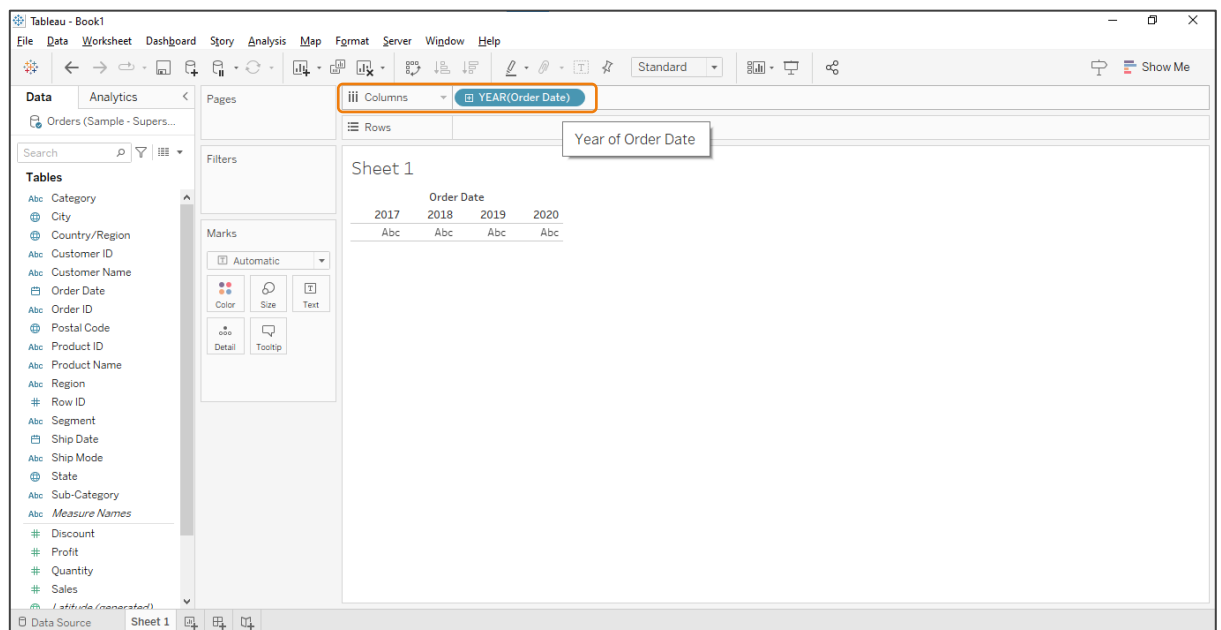
Step 1: Import the dataset

- 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.

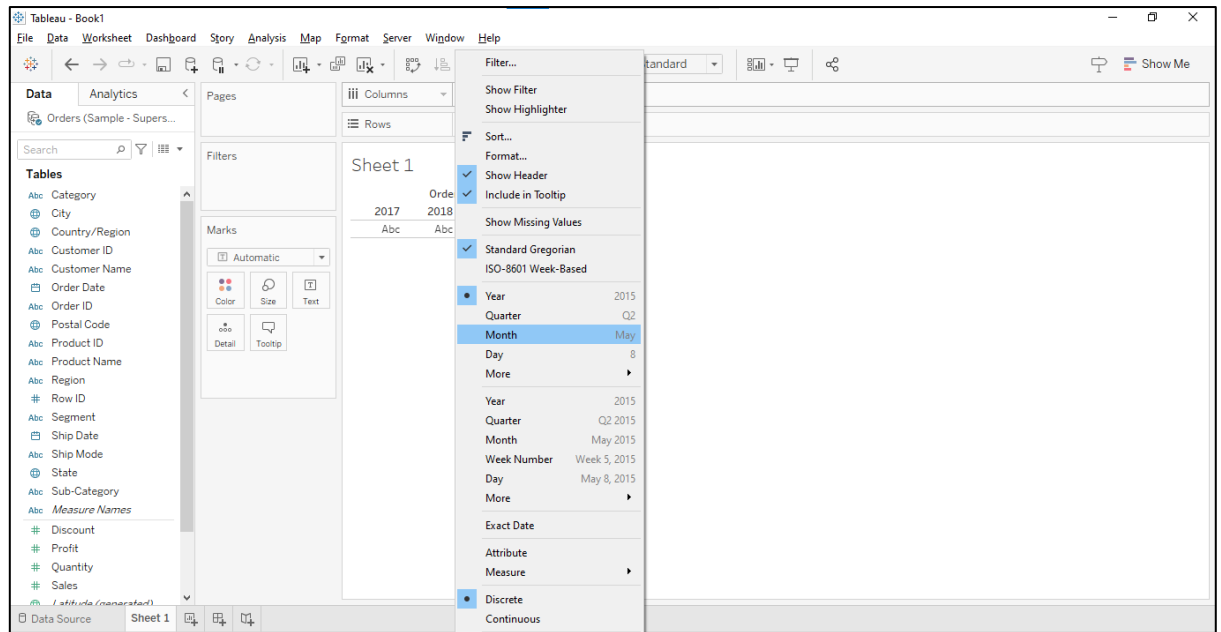


Step 2: Create a line and bar chart

2.1 Drag **Order Date** to **Columns**; it will automatically take the **Year** as the date part

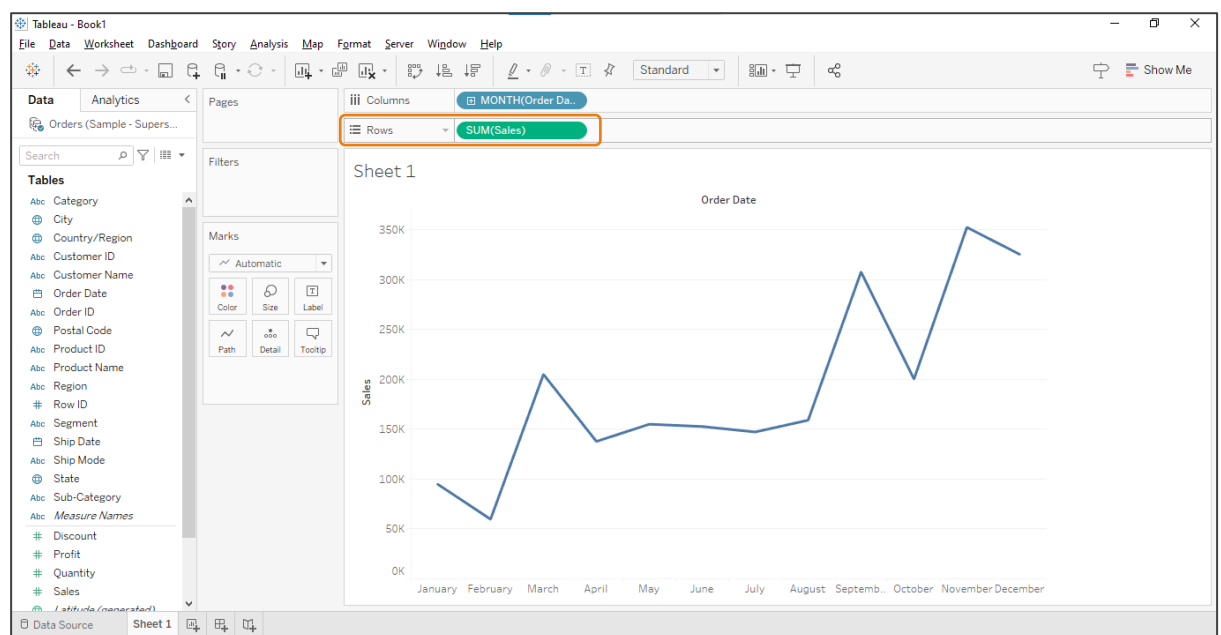


2.2 In the **Columns** shelf, right-click **YEAR(Order Date)** and select **Month**

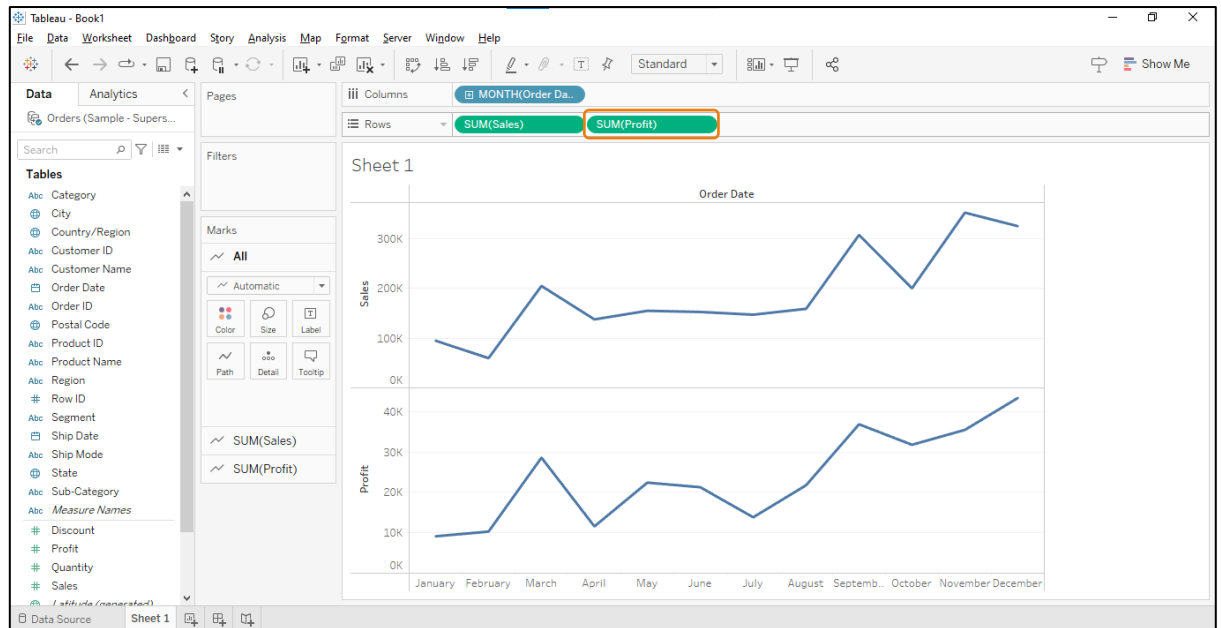


2.3 Drag **Sales** to **Rows**

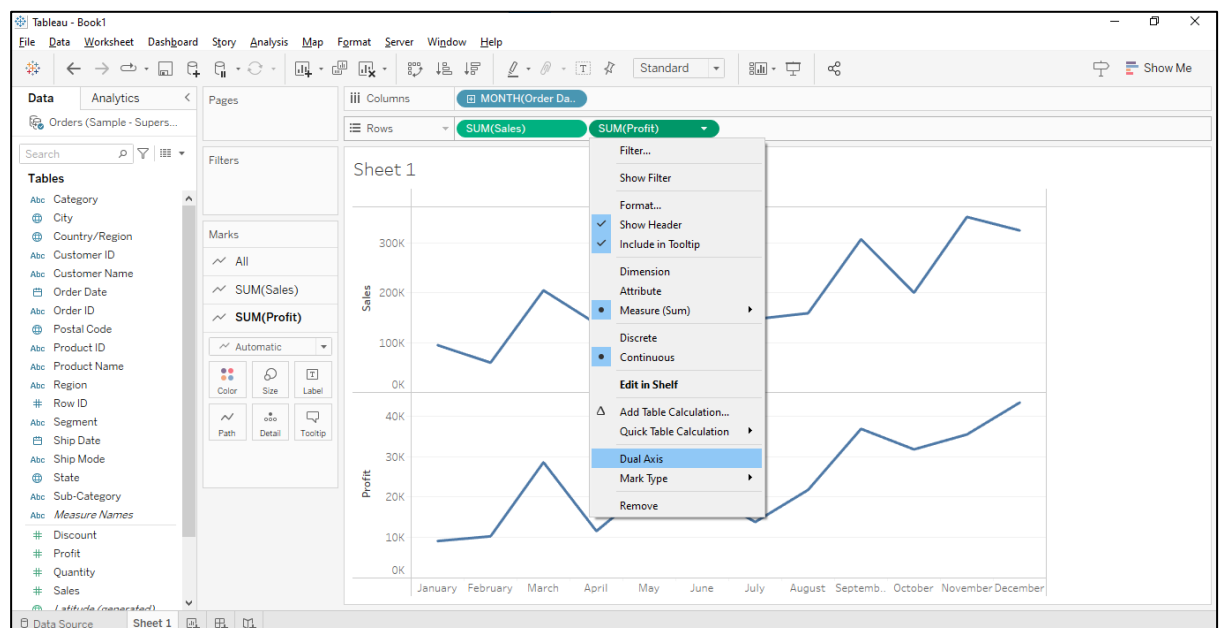
The line chart is created as shown below:



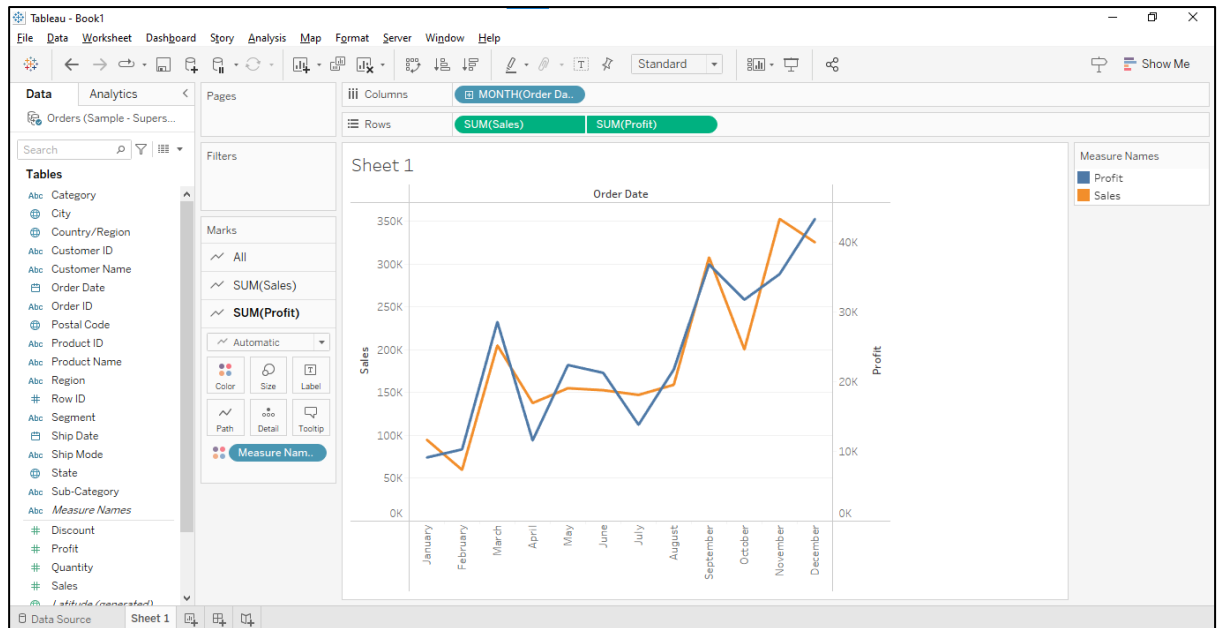
2.4 Drag **Profit** to **Rows** and place it to the right of **SUM(Sales)**



2.5 In the **Rows** shelf, right-click **SUM(Profit)** and select **Dual Axis**

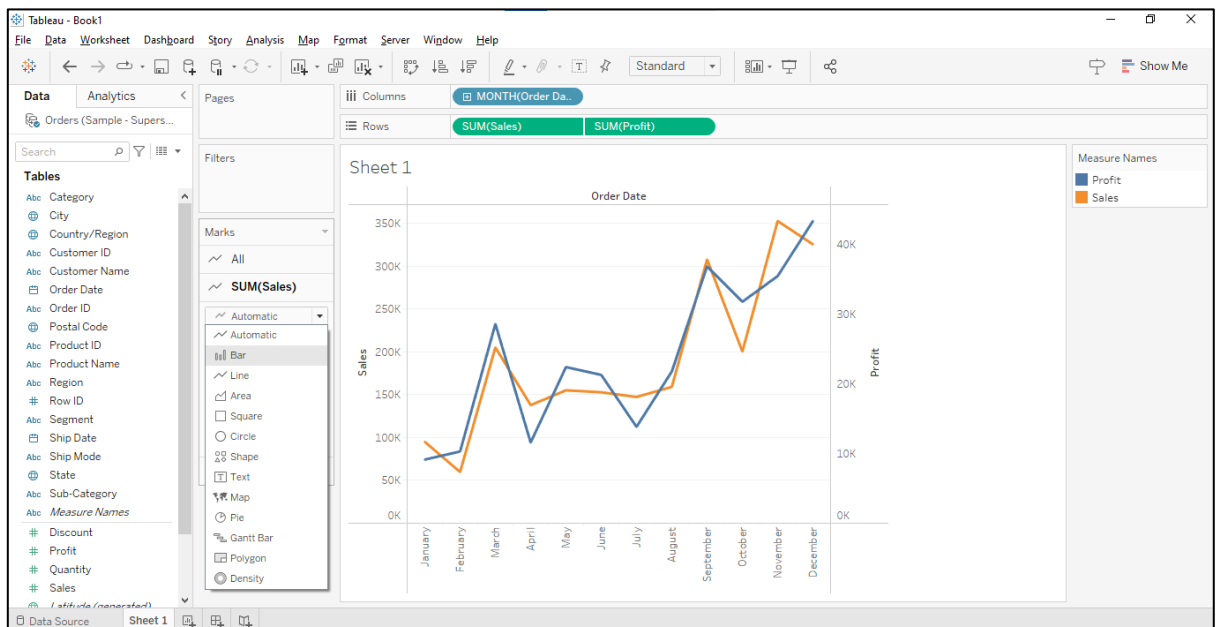


The chart appears as shown below:

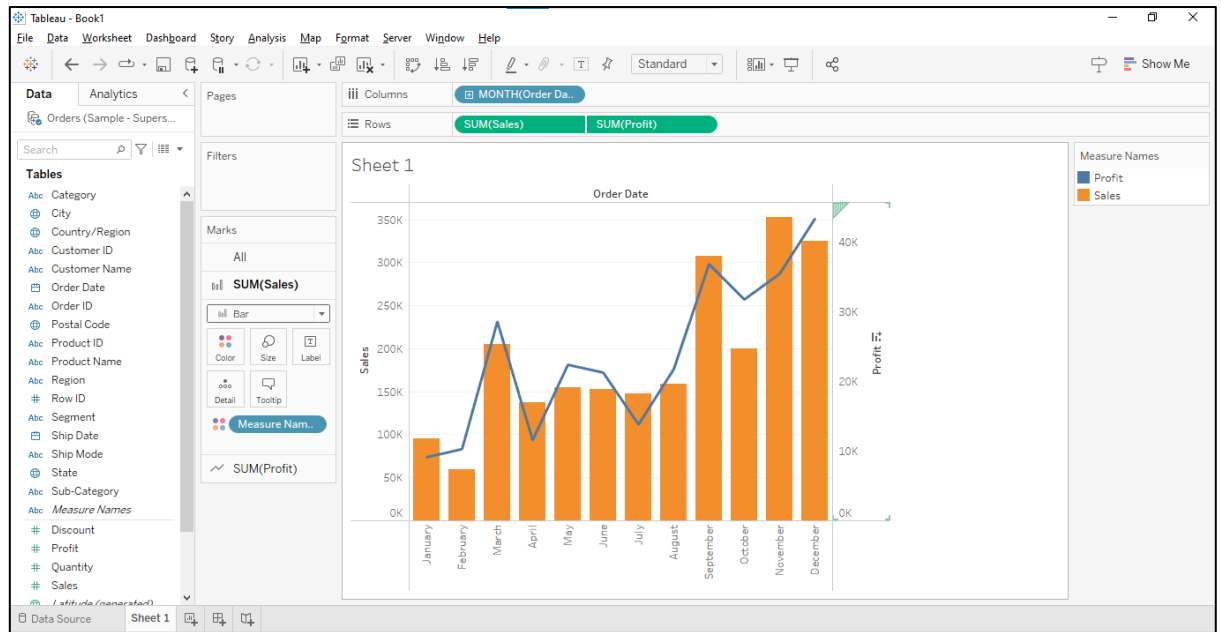


Note: The measure names are added to the color legends displayed on the **Marks** card to differentiate the lines.

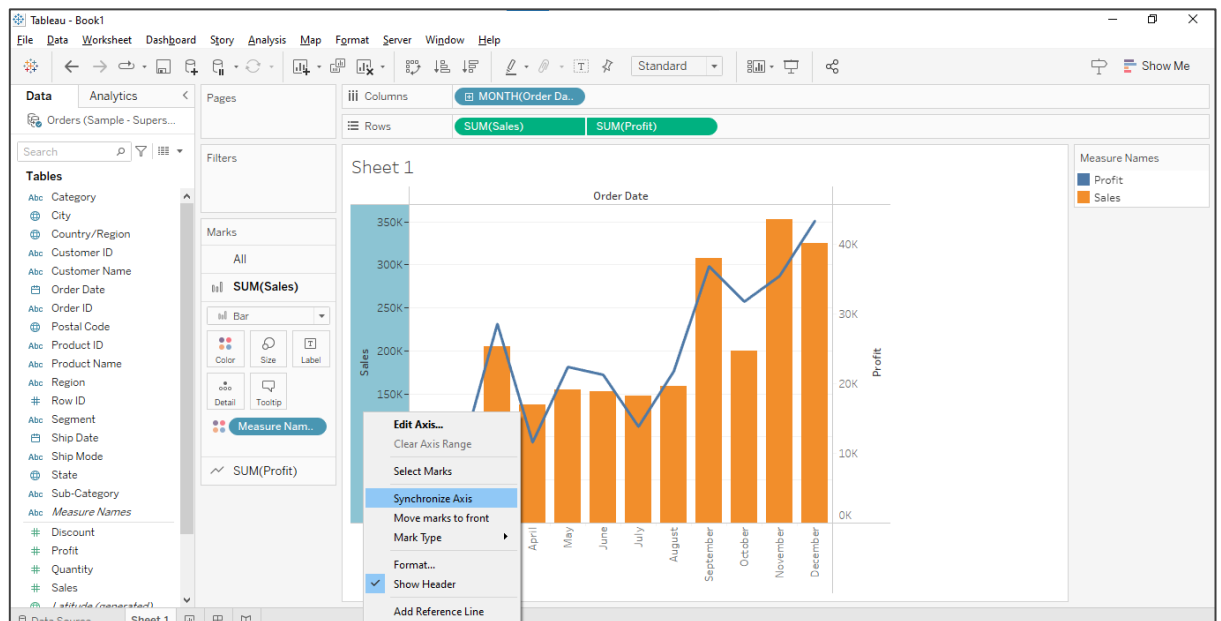
2.6 On the **SUM(Sales)** Marks card, click the mark type drop-down and select **Bar**



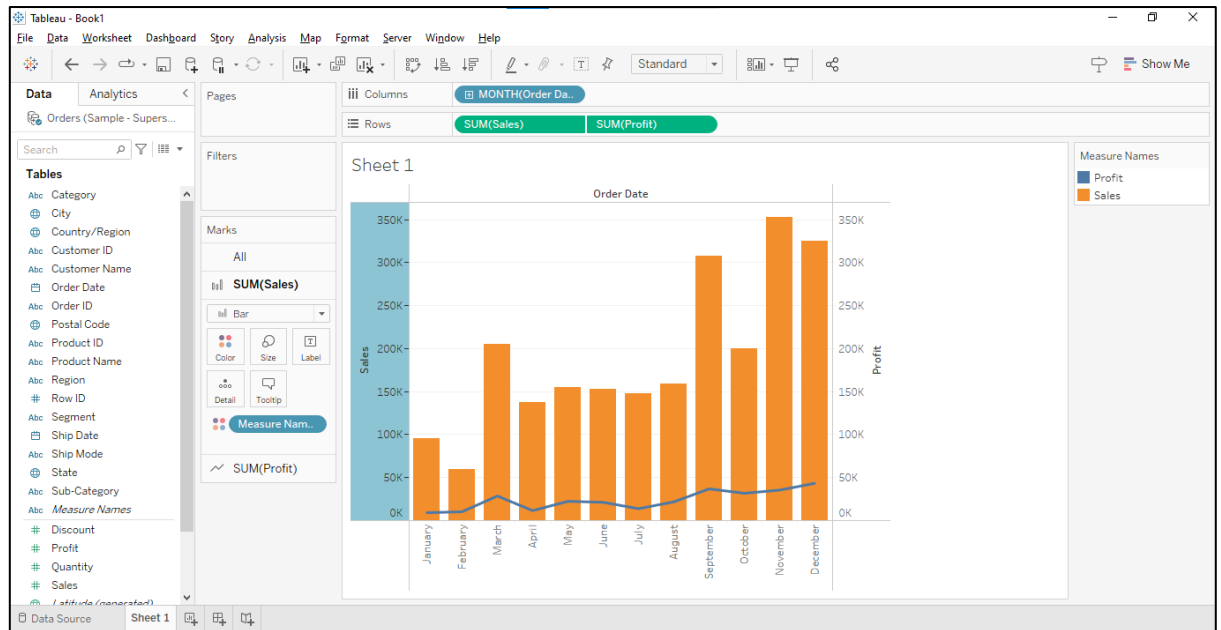
The chart appears as shown below:



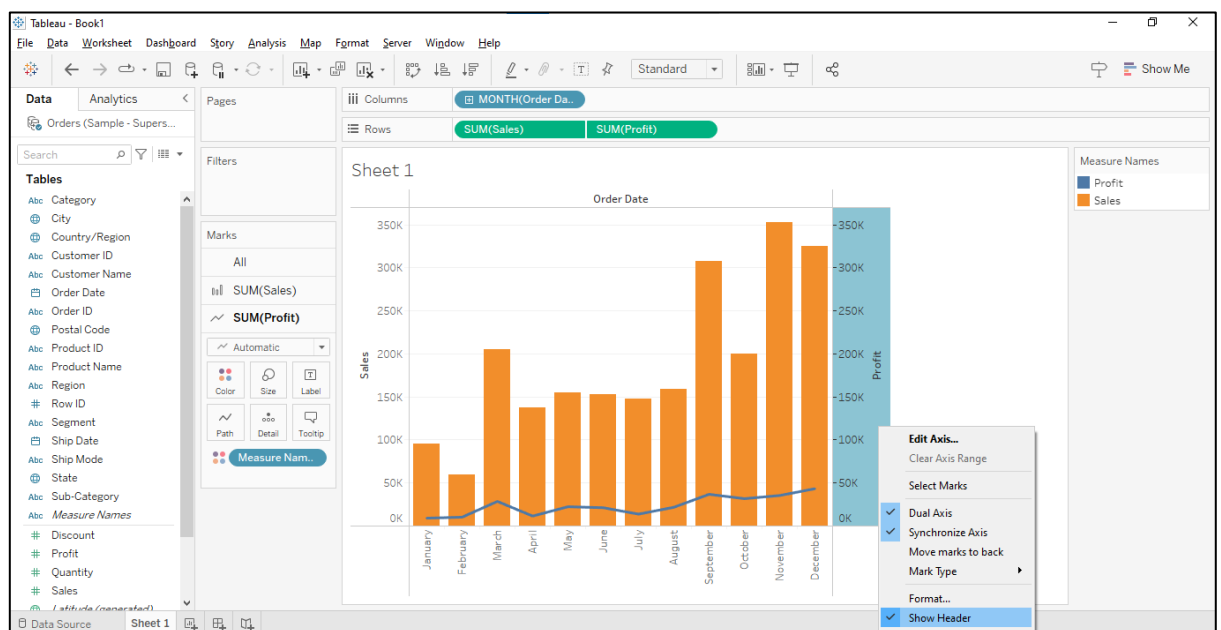
2.7 In the visualization, right-click on any of the **Axis (Sales or Profit)** and select **Synchronize Axis**



The chart appears as shown below:

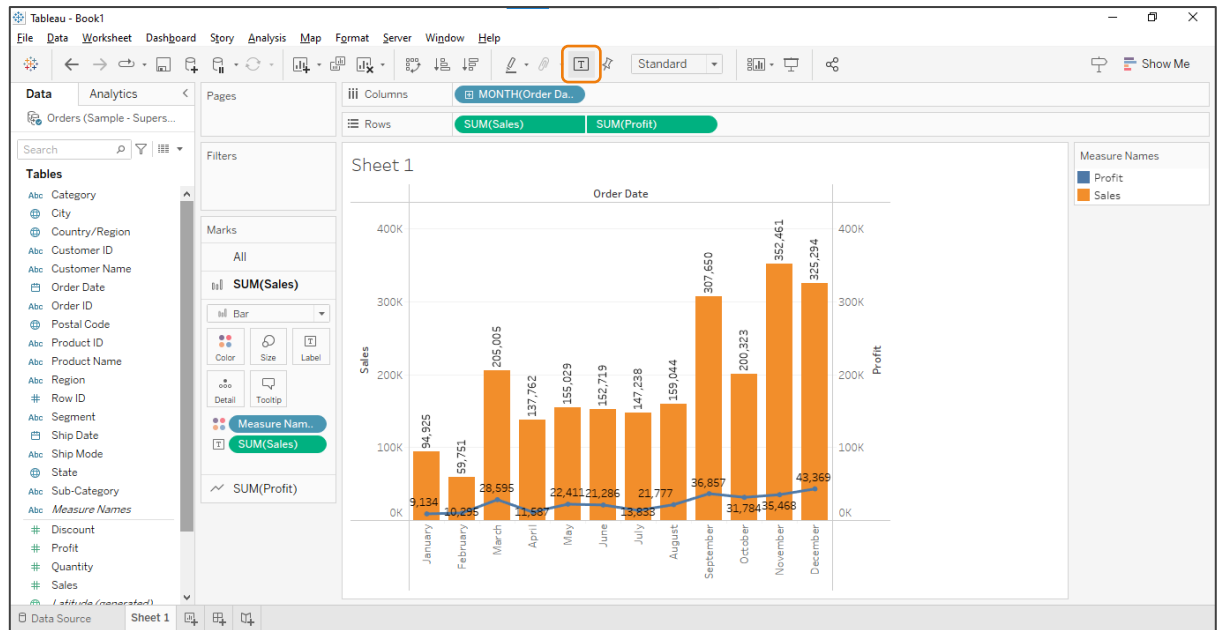


2.8 Click on the **Profit** axis and uncheck **Show Header**



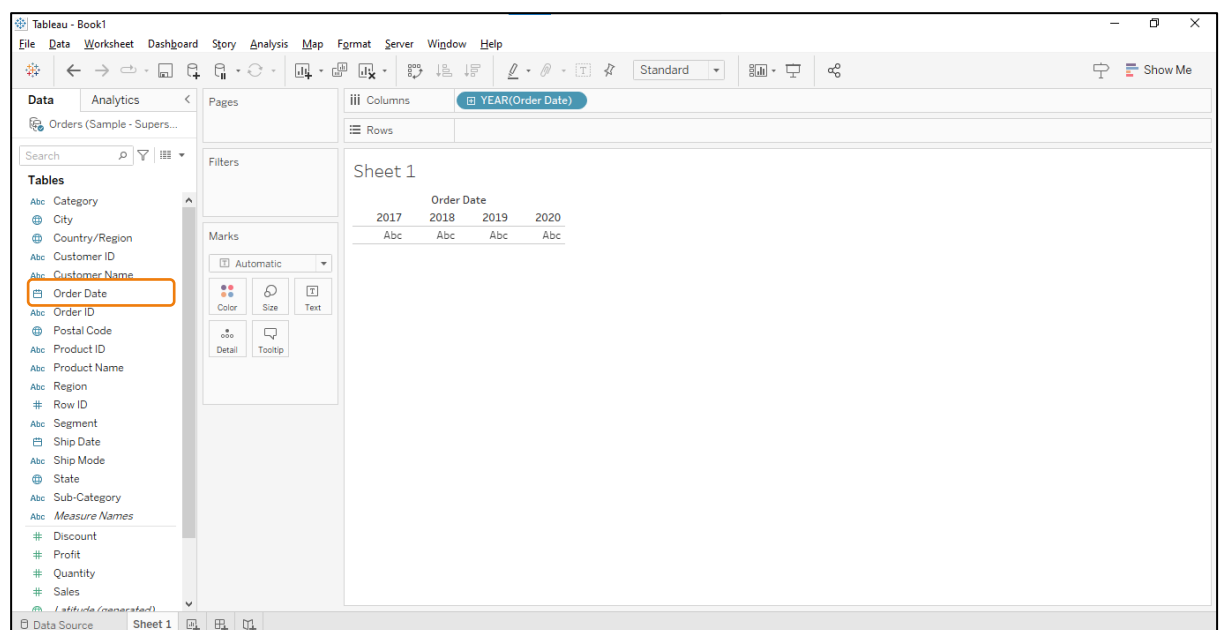
The line and bar chart is created.

2.9 Add labels from the respective **Marks** card or labels in the **Menu**

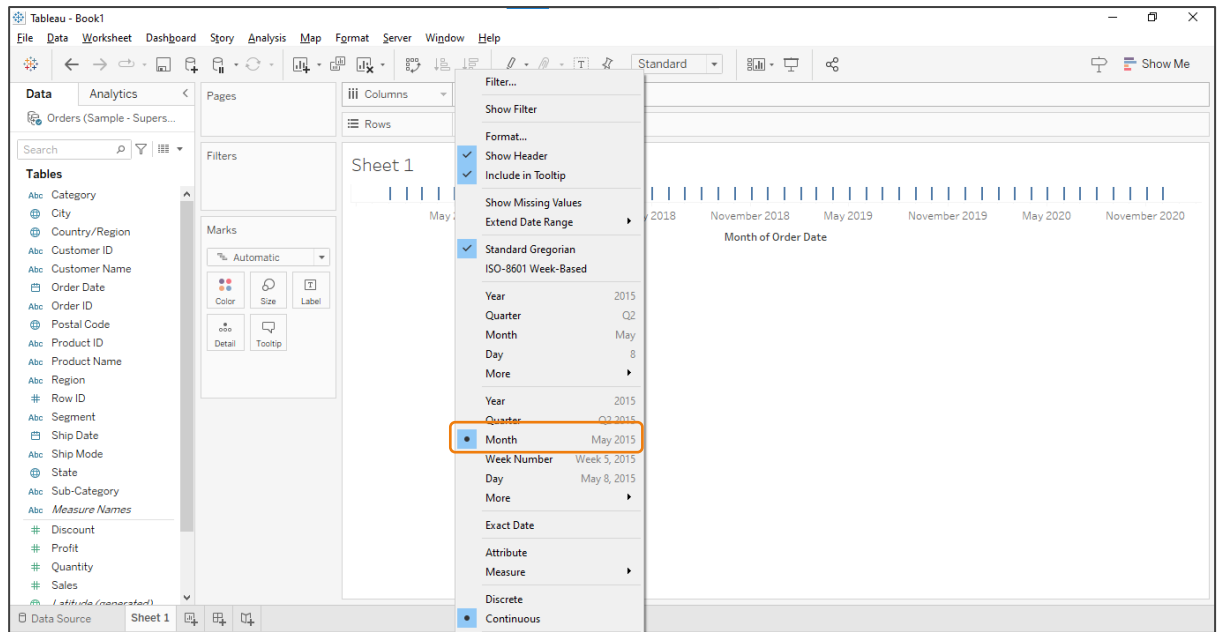


Step 3: Create an area chart

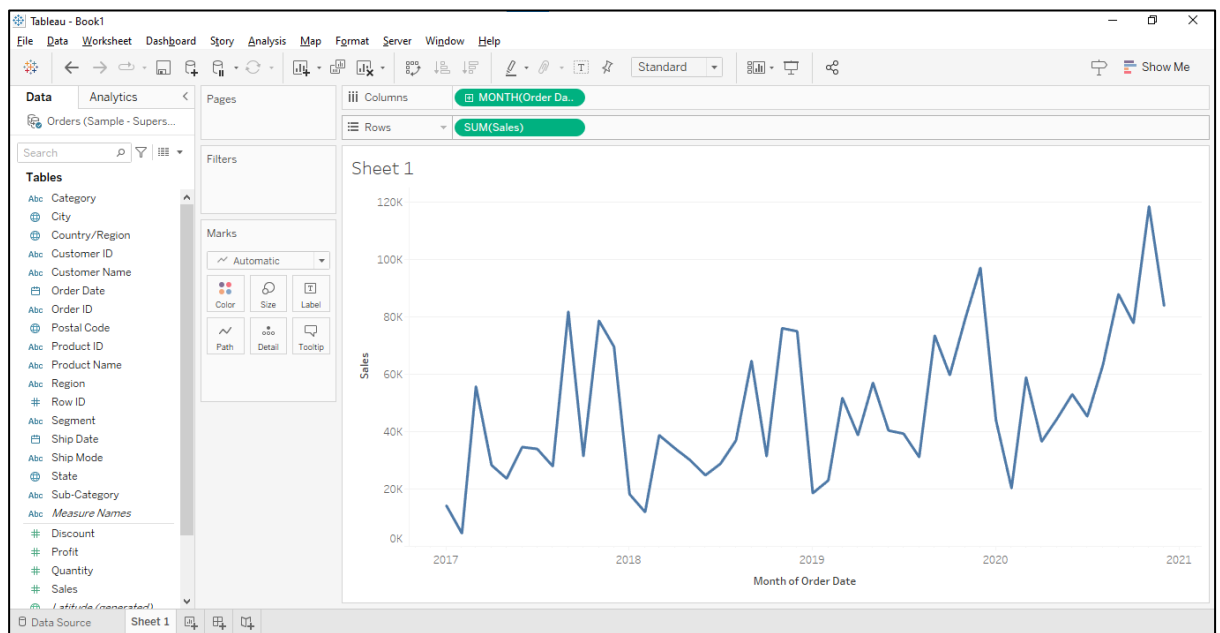
3.1 Drag Order Date to Columns



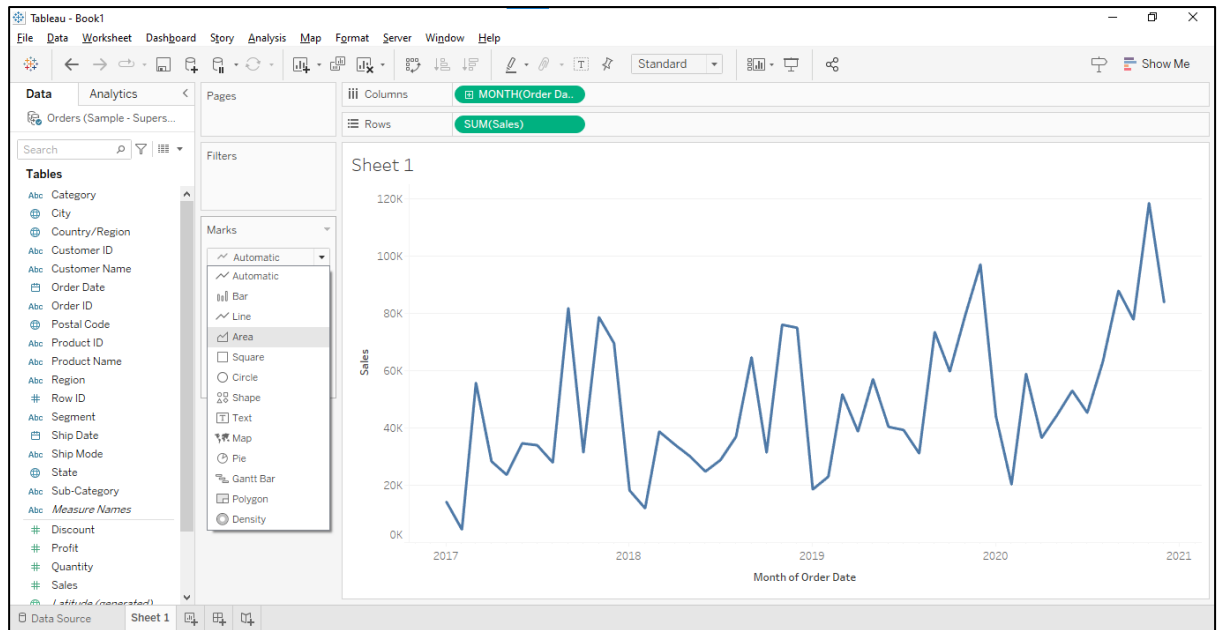
3.2 Right-click on YEAR(Order Date) and select Month from the date value



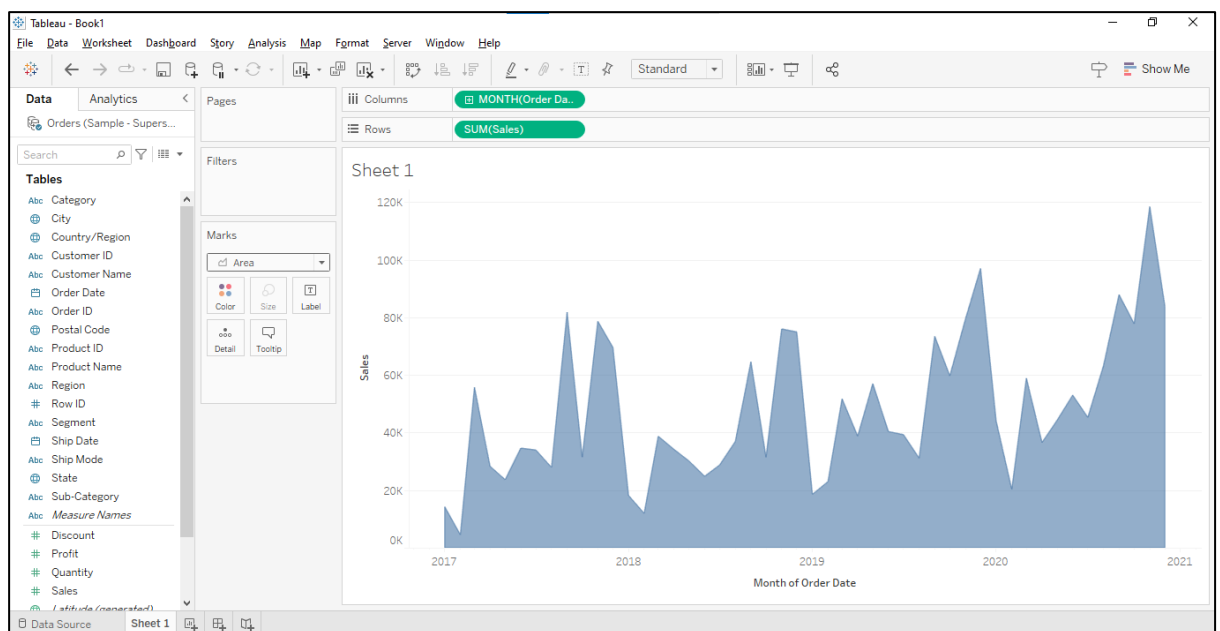
3.3 Drag **Sales** to **Rows**



3.4 From the **Marks** card, select **Area** marks



The area chart appears as shown below:



With these steps, you have successfully demonstrated how to transform basic visualizations into insightful representations. By utilizing features like dual-axis and area marks, we have visualized sales and profit trends dynamically.