Lesson 07 Demo 01
Bullet Chart

Objective: To create a bullet chart to view the relation between sales of current year with sales of the previous year

Tools required: Tableau Desktop

Prerequisites: None

Note: Download the **Sample - Superstore** dataset from the Reference Materials of the LMS
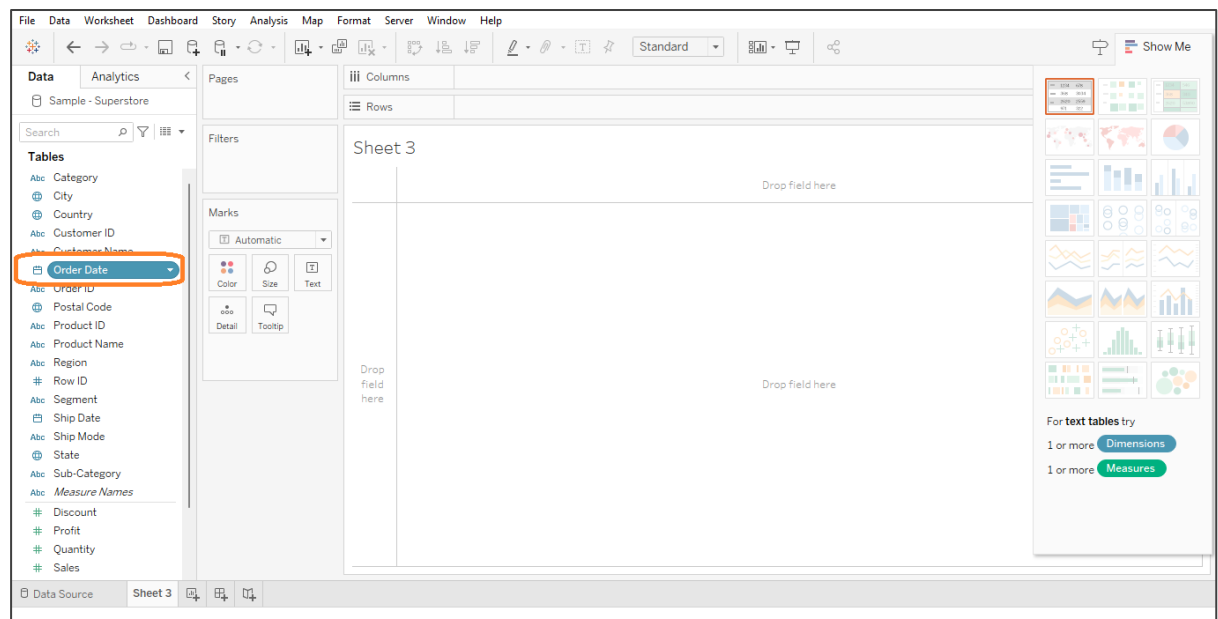
Steps to be followed:

1. Create a parameter for selecting the reference date
2. Create the Reference CY Sales calculated field from the data pane
3. Create the Reference PY Sales calculated field from the data pane
4. Create the Budgeted Sales calculated field from the data pane
5. Create the bullet chart visualization

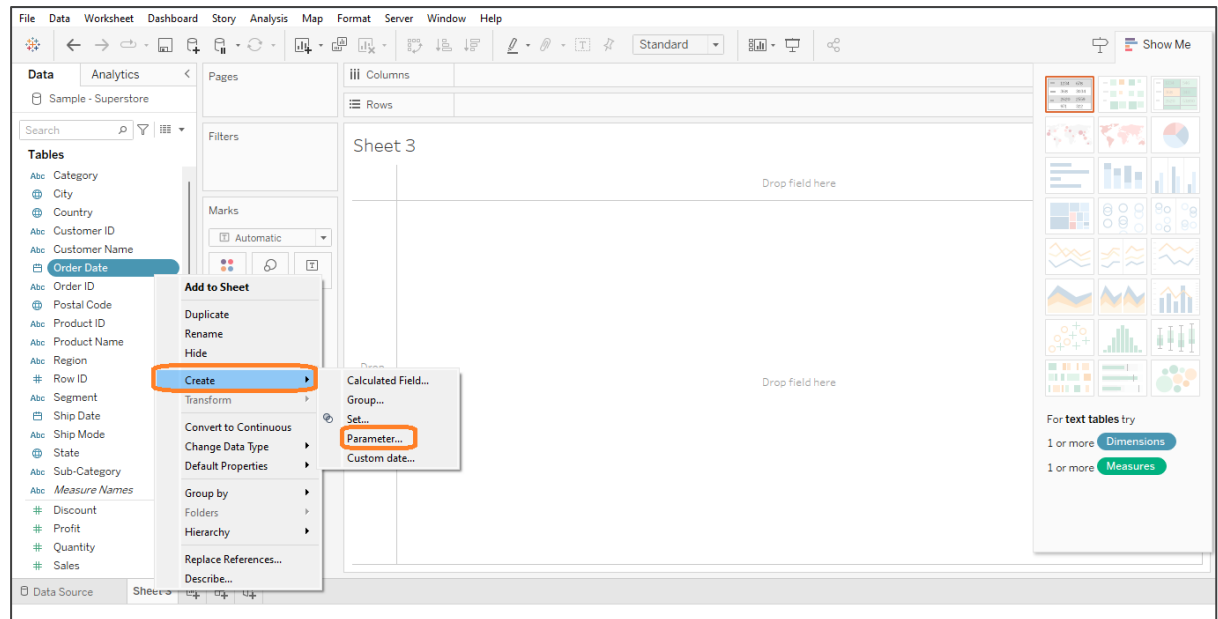**Step 1: Create a parameter for selecting the reference date**

1.1   Load the **Sample – Superstore** to the data source and open a new sheet
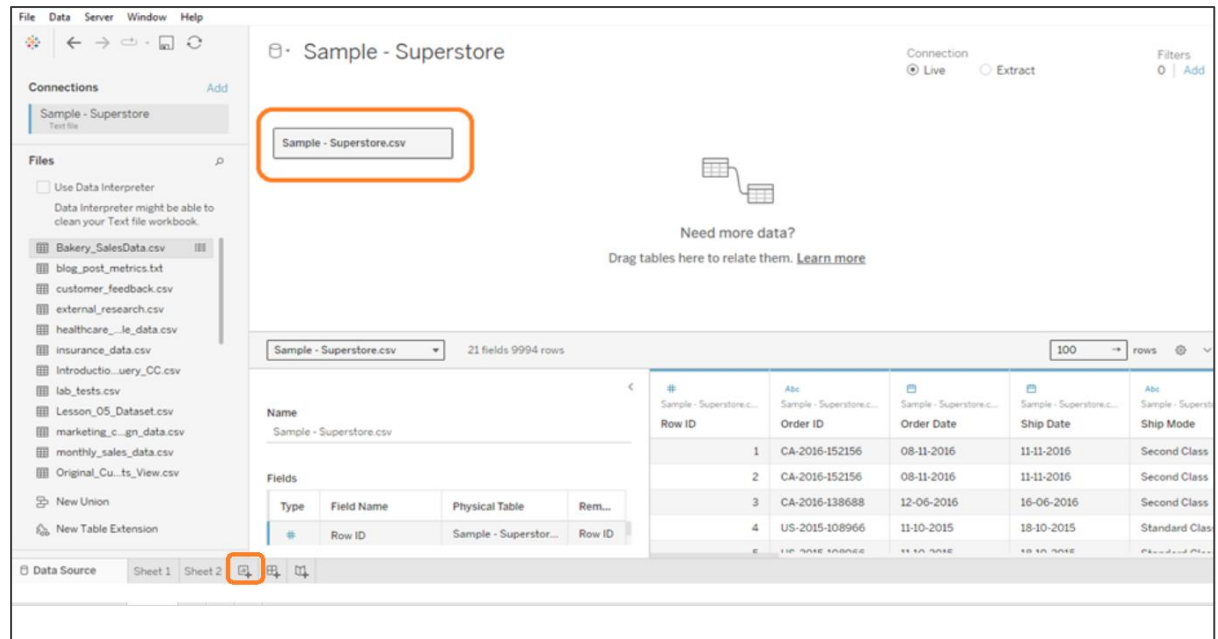
1.2 Right-click on **Order Date**

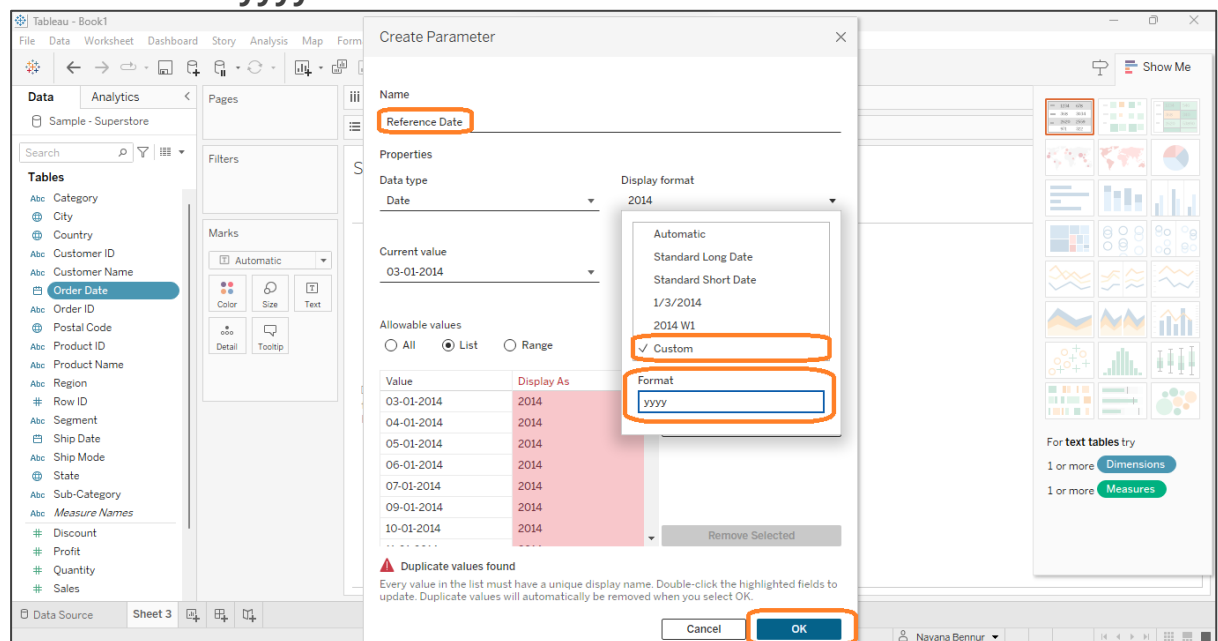## 1.3 Click on **Create** and then select **Parameter**

1.4   Fill all the fields as shown below and click on **OK**:
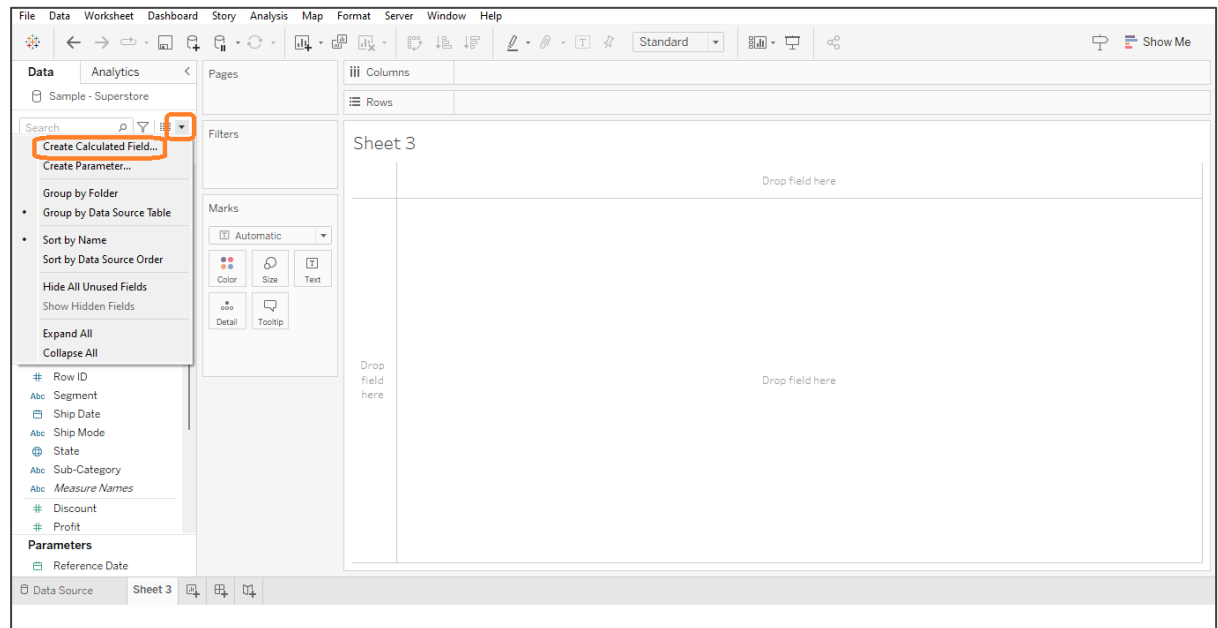   **Name: Reference Date**
       Data type: Data
       Display format: Custom
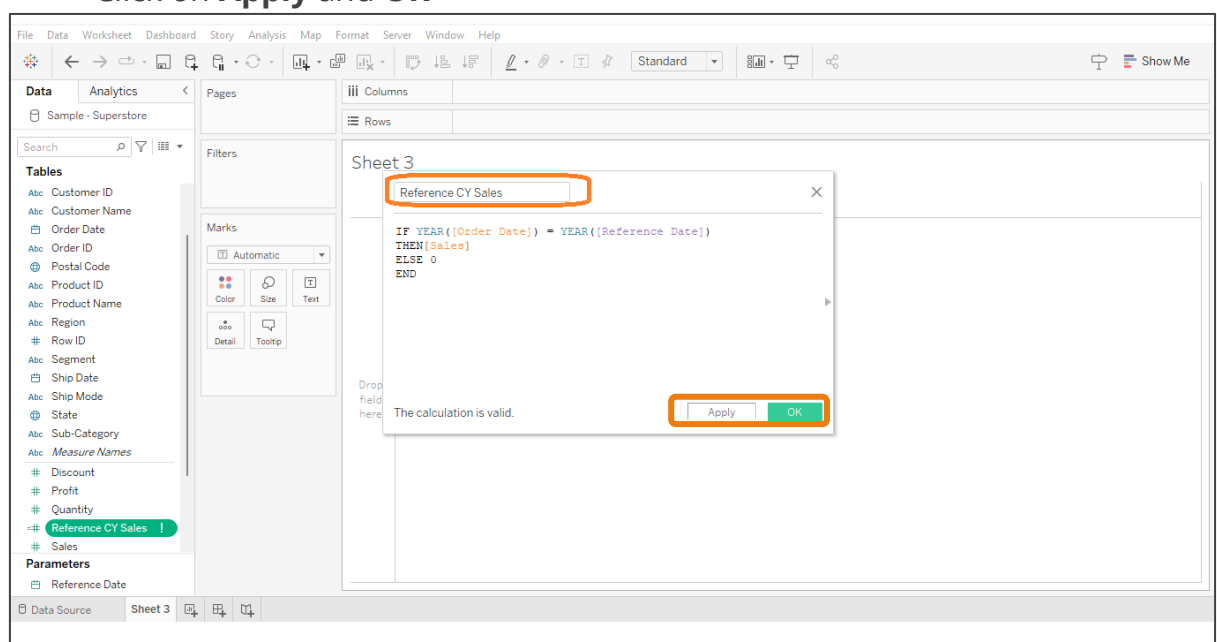   **Format: yyyy**

Step 2: Create the Reference CY Sales field calculated field from the data pane

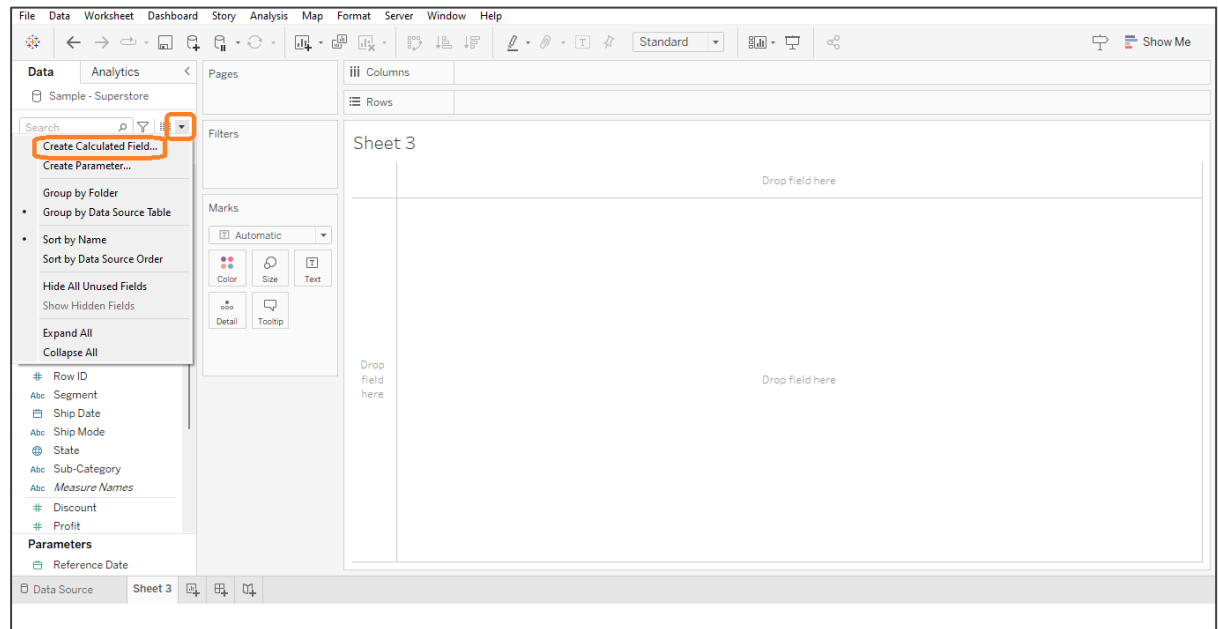**2.1** Click on the dropdown and choose the **Create Calculated Field** option

2.2 Name the calculated field as **Reference CY Sales.** Use the following syntax:
IF YEAR([Order Date]) = YEAR([Reference Date])
THEN[Sales]
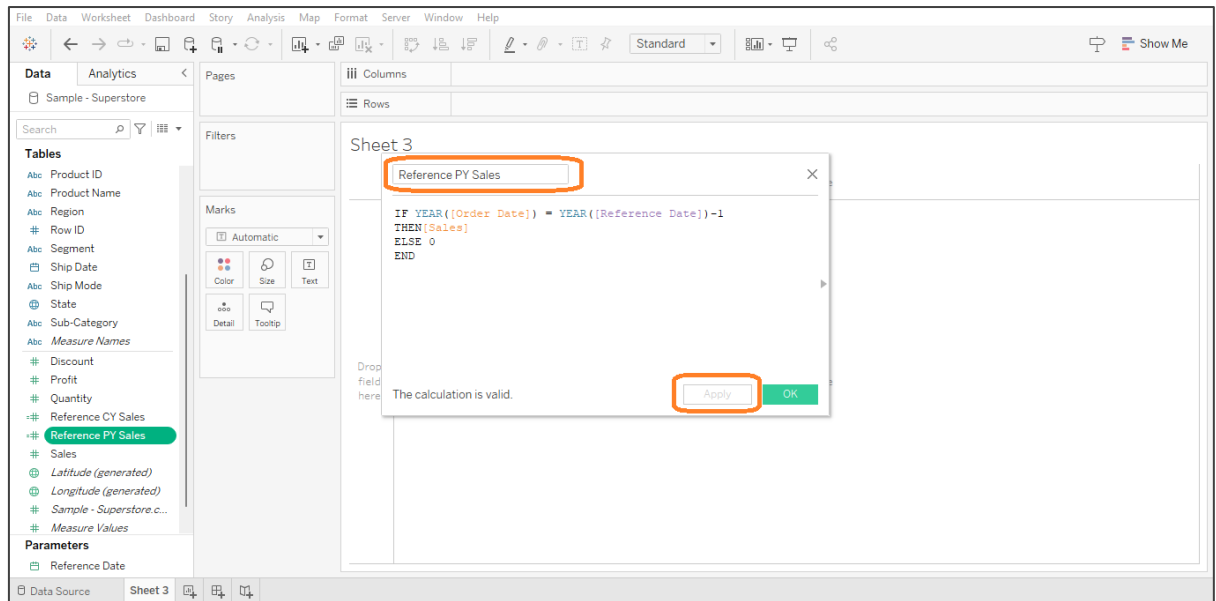**ELSE 0**
END

Click on **Apply** and **OK**

Step 3: Create the Reference PY Sales field calculated field from the data pane

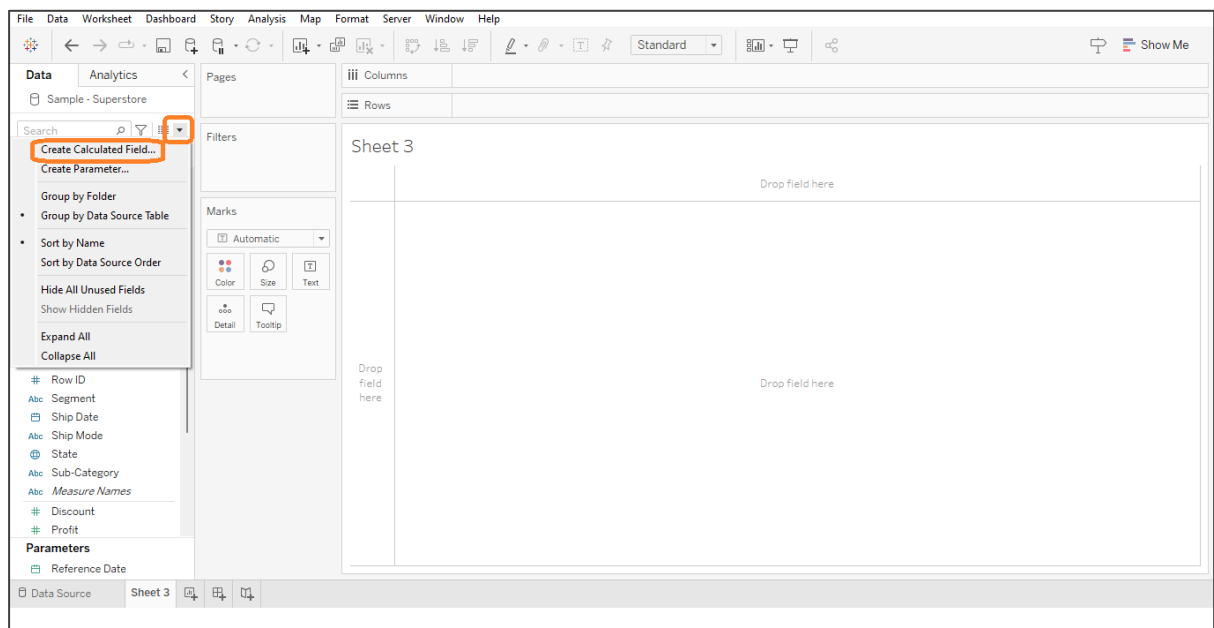3.1   Click on the dropdown and choose the **Create Calculated Field** option

3.2   Name the calculated field as **Reference PY Sales**, use the following syntax, and click on **Apply** and **OK**:

IF YEAR([Order Date]) = YEAR([Reference Date])-1
THEN[Sales]
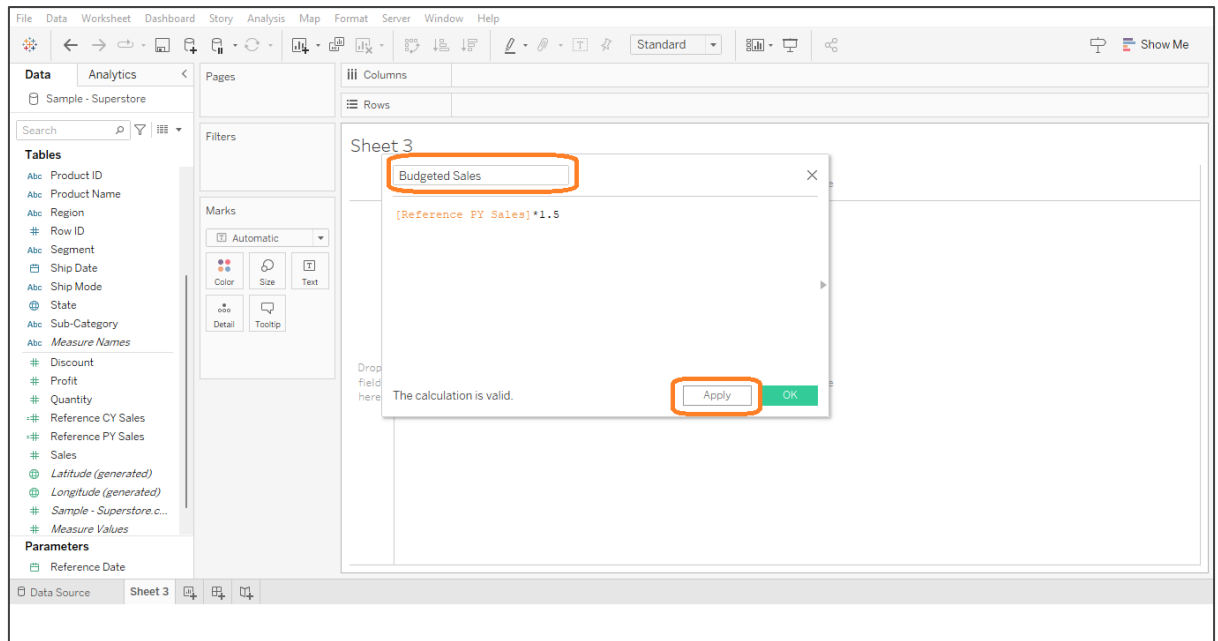**ELSE 0**
END

Step 4: Create the Budgeted Sales calculated field from the data pane

4.1   Click on the dropdown and choose the **Create Calculated Field** option
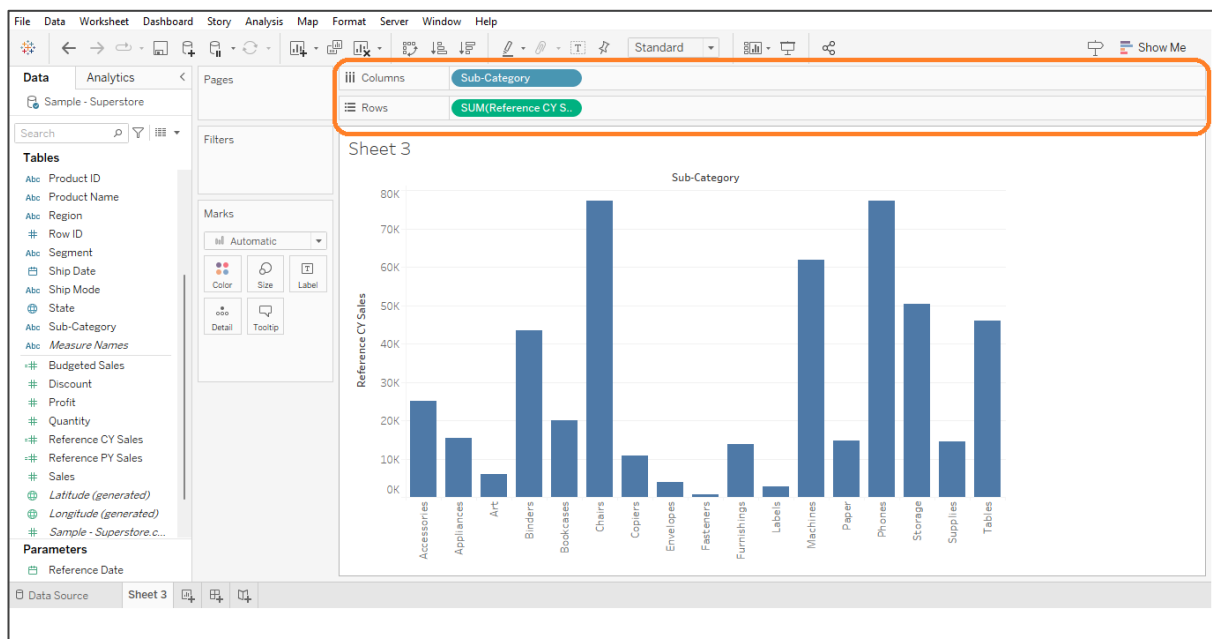

4.2   Name the calculated field as **Budgeted Sales**, use the following syntax, and click on **Apply** and **OK**:
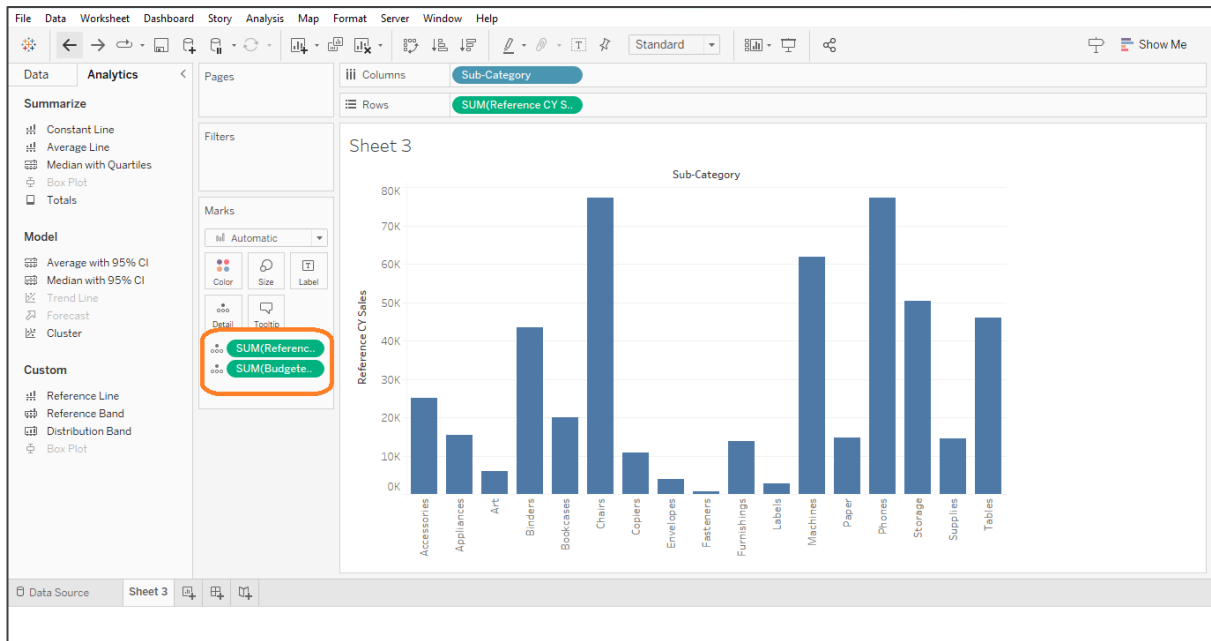
[Reference PY Sales]*1.5

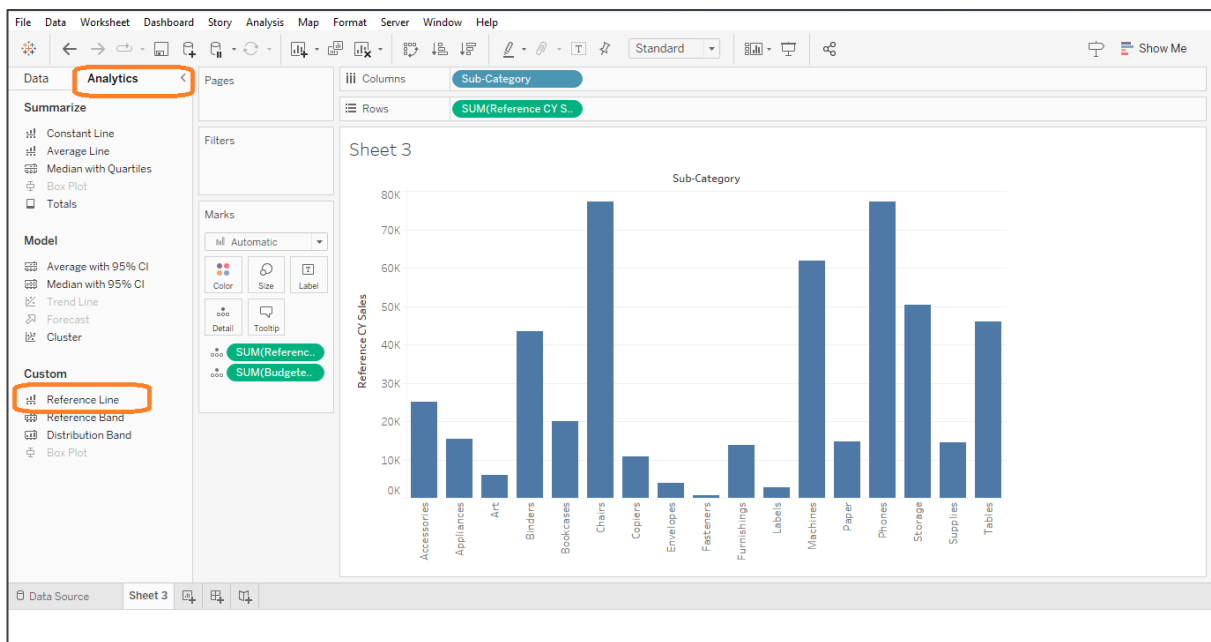## Step 5: Create the bullet chart visualization

5.1   Drag **Sub-Category** into **Columns** and **Reference CY Sales** into **Rows**
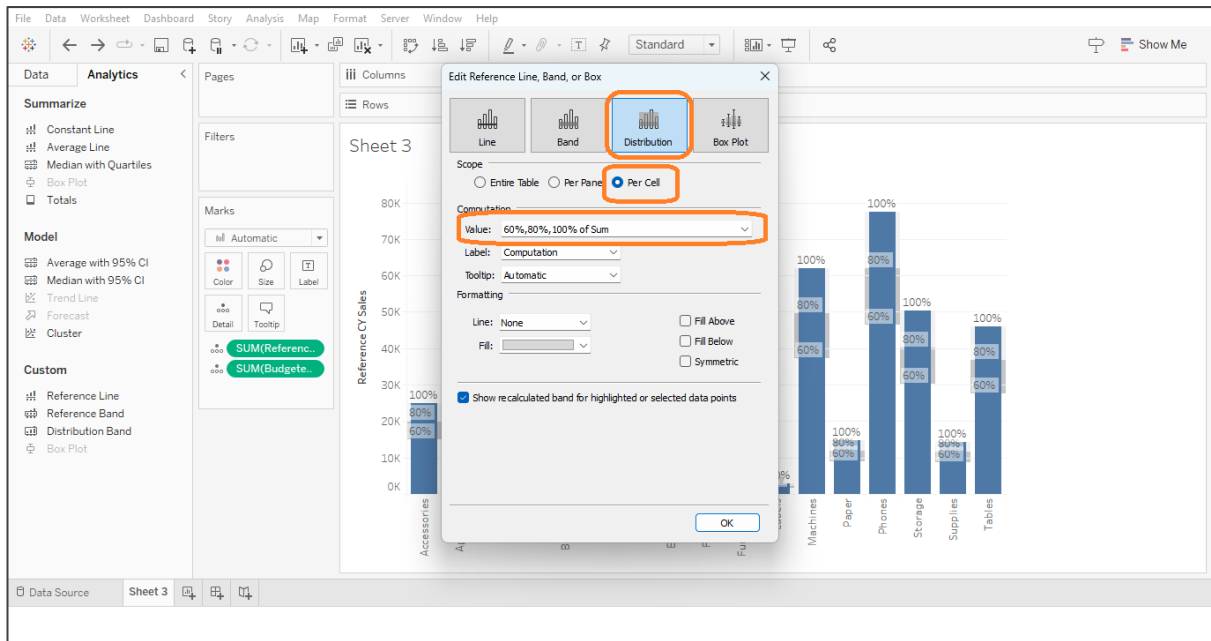

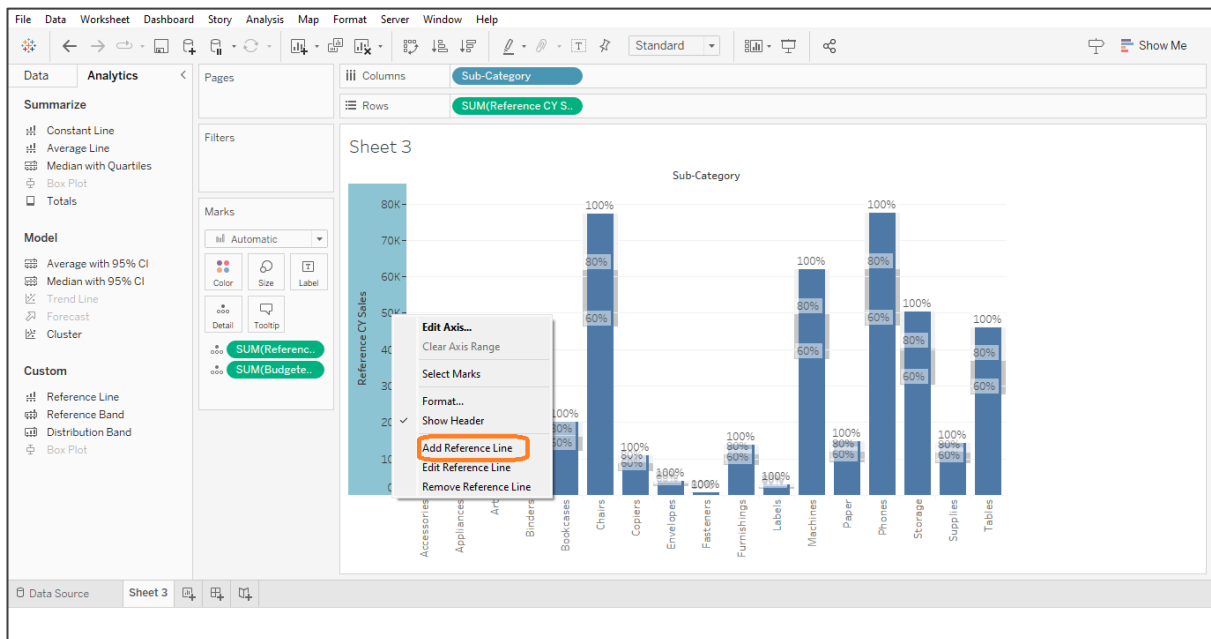### 5.2   Drag **Reference PY Sales** and **Budgeted Sales** to details

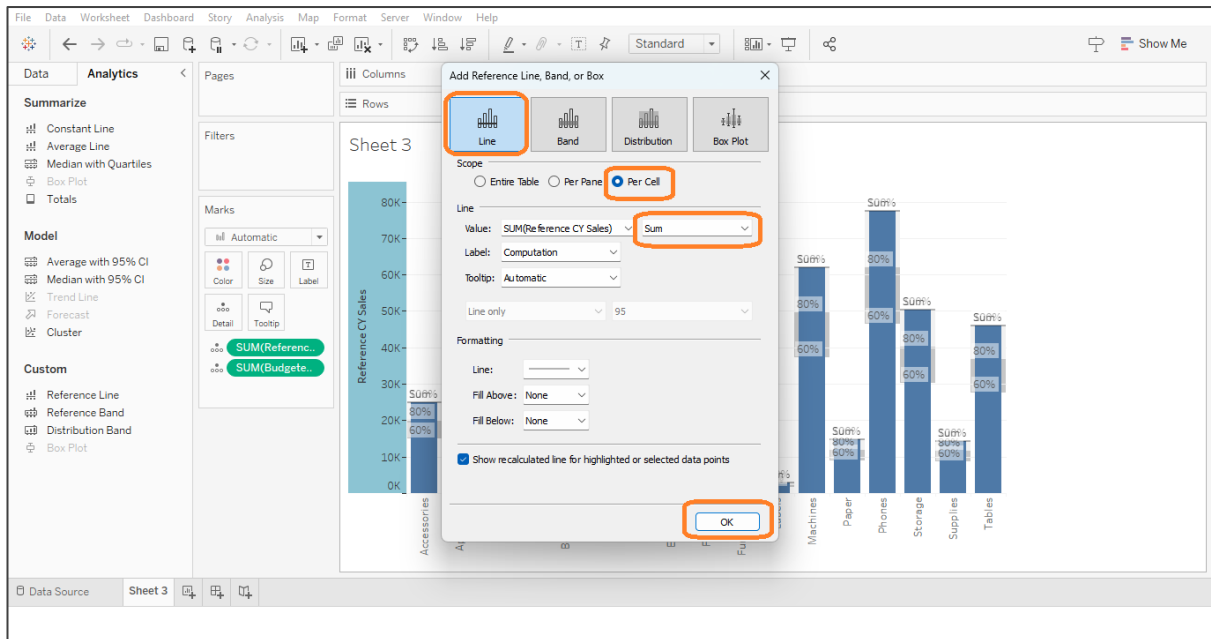## 5.3 Go to the **Analytics** section and choose **Reference Line**

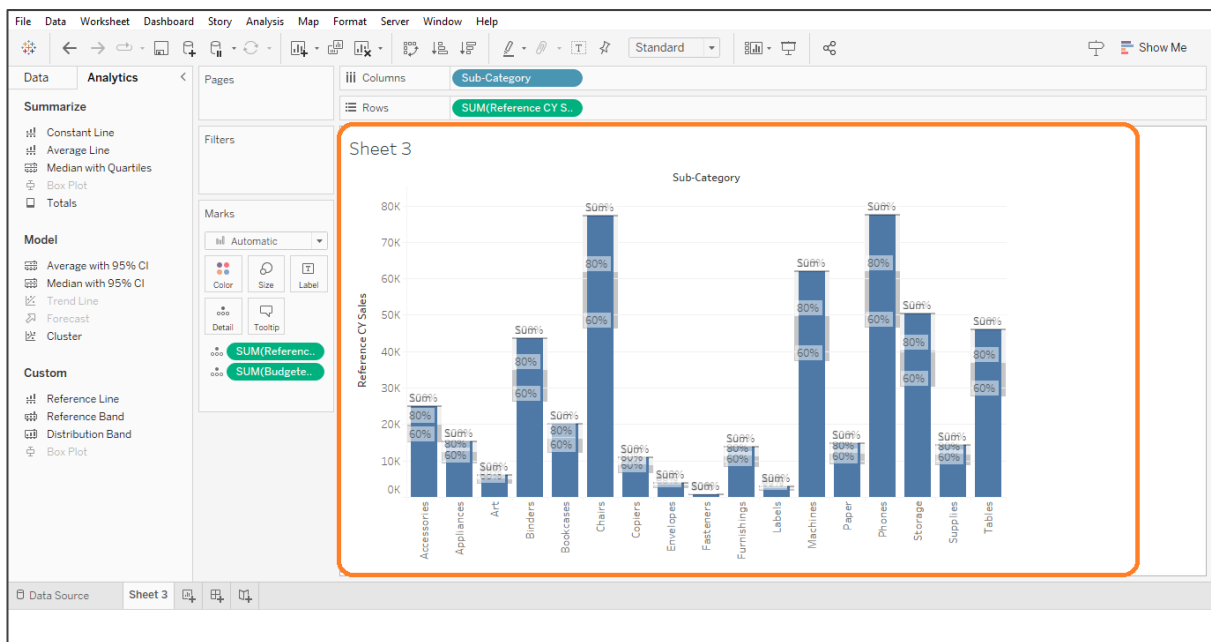## 5.4 Fill all the fields as shown below and click on **OK**

5.5 Right-click on the **Reference CY Sales** axis to add another reference line

5.6 Fill all the fields as shown below and click on **OK**

The output will appear as below:

With these steps, you have successfully created a bullet chart to view the relation between sales of current year with sales of the previous year.