

# Lesson 06 Demo 02

## Table Calculations

**Objective:** To perform running total calculation to analyze the cumulative sales trend between different measures

**Tools required:** Tableau Desktop

**Prerequisites:** None

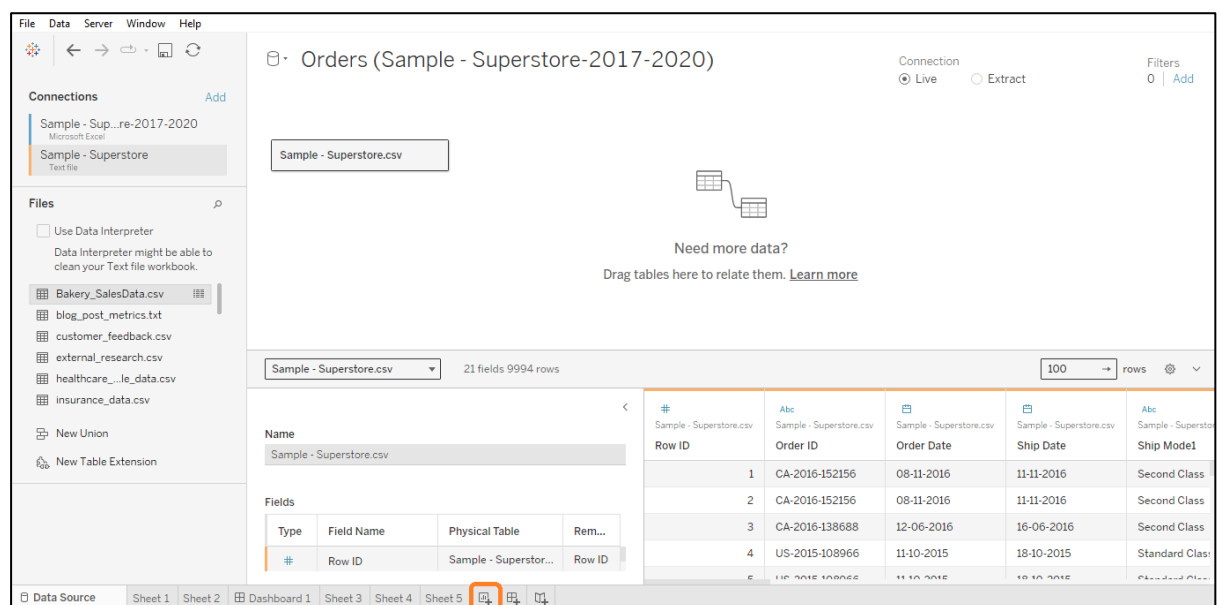
**Note:** Download the **Sample-Superstore.csv** dataset from the Reference Materials section of the LMS

Steps to be followed:

1. Open a new sheet
2. Create a table
3. Add a calculation to the field

### Step 1: Open a new sheet

- 1.1 Click on the add sheet button present at the bottom of the screen



## Step 2: Create a table

### 2.1 Add **Order Date** into **Rows** and drill down to **Quarter** by clicking on the plus sign

Tableau Desktop interface showing the initial setup for creating a table. The 'Columns' shelf contains 'YEAR(Order Date)' and 'QUARTER(Order Date)'. The 'Rows' shelf is empty. The 'Marks' card is set to 'Automatic'. The view displays a table with columns for Year of Order Date and Quarter of Order Date, and rows for each year from 2014 to 2017, with quarters Q1 through Q4. The 'Sales' measure is not yet added to the Marks card.

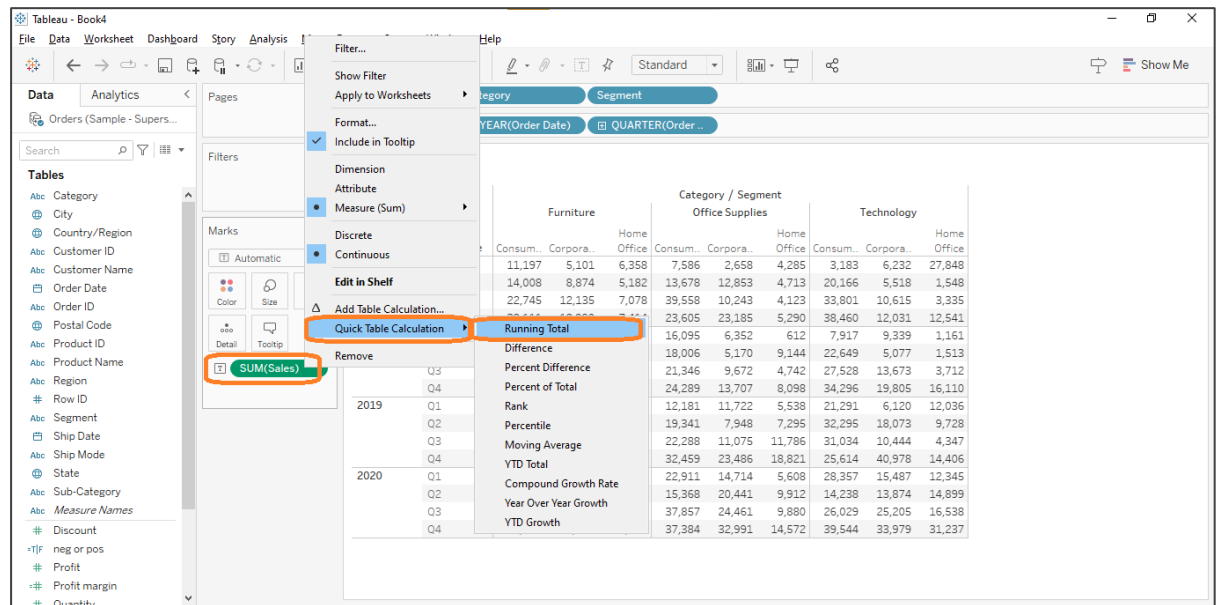
### 2.2 Add **Category** and **Segment** into **Columns** and add **Sales** into **Text** in the **Marks** card

Tableau Desktop interface showing the final setup for creating a table. The 'Columns' shelf contains 'Category' and 'Segment'. The 'Rows' shelf contains 'YEAR(Order Date)' and 'QUARTER(Order Date)'. The 'Marks' card is set to 'SUM(Sales)'. The view displays a table with columns for Year of Order Date, Quarter of Order Date, Category, and Segment, and rows for each year from 2014 to 2017, with quarters Q1 through Q4. The 'Sales' measure is added to the Marks card.

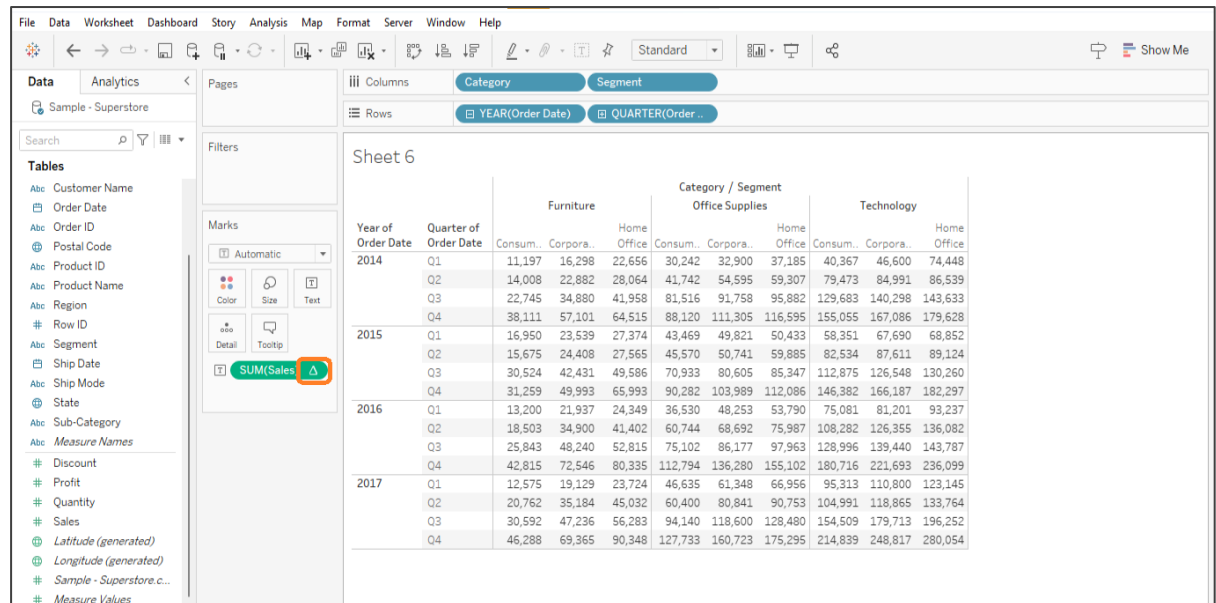
Year of Order Date	Quarter of Order Date	Category / Segment								
		Furniture			Office Supplies			Technology		
		Consum...	Corpora...	Home Office	Consum...	Corpora...	Home Office	Consum...	Corpora...	Home Office
2014	Q1	11,197	5,101	6,358	7,586	2,658	4,285	3,183	6,232	27,848
	Q2	14,008	8,874	5,182	13,678	12,853	4,713	20,166	5,518	1,548
	Q3	22,745	12,135	7,078	39,558	10,243	4,123	33,801	10,615	3,335
	Q4	38,111	18,990	7,414	23,605	23,185	5,290	38,460	12,031	12,541
2015	Q1	16,950	6,588	3,835	16,095	6,352	612	7,917	9,339	1,161
	Q2	15,675	8,732	3,157	18,006	5,170	9,144	22,649	5,077	1,513
	Q3	30,524	11,907	7,155	21,346	9,672	4,742	27,528	13,673	3,712
	Q4	31,259	18,734	16,000	24,289	13,707	8,098	34,296	19,805	16,110
2016	Q1	13,200	8,737	2,413	12,181	11,722	5,538	21,291	6,120	12,036
	Q2	18,503	16,397	6,503	19,341	7,948	7,295	32,295	18,073	9,728
	Q3	25,843	22,397	4,574	22,288	11,075	11,786	31,034	10,444	4,347
	Q4	42,815	29,731	7,789	32,459	23,486	18,821	25,614	40,978	14,406
2017	Q1	12,575	6,554	4,595	22,911	14,714	5,608	28,357	15,487	12,345
	Q2	20,762	14,422	9,848	15,368	20,441	9,912	14,238	13,874	14,899
	Q3	30,592	16,644	9,047	37,857	24,461	9,880	26,029	25,205	16,538
	Q4	46,288	23,076	20,983	37,384	32,991	14,572	39,544	33,979	31,237

### Step 3: Add a calculation to the field

- 3.1 Right-click on the **Sum** measure present in the **Marks** card, select **Quick Table Calculation**, and then select **Running Total**



The output will look like:



**Observation:** After choosing running total, you will see a triangle with the sales measure in the marks card like shown in the above screenshot.

With these steps, you will have successfully performed table calculations in Tableau.