

## Lesson 04 Demo 03

### Trend Line and Forecast Line

**Objective:** To demonstrate the process of adding a forecast line, displaying a trend line with equation, generating totals and subtotals, and producing a cross-tabulation for analysis

**Tools required:** Tableau Desktop

**Prerequisites:** None

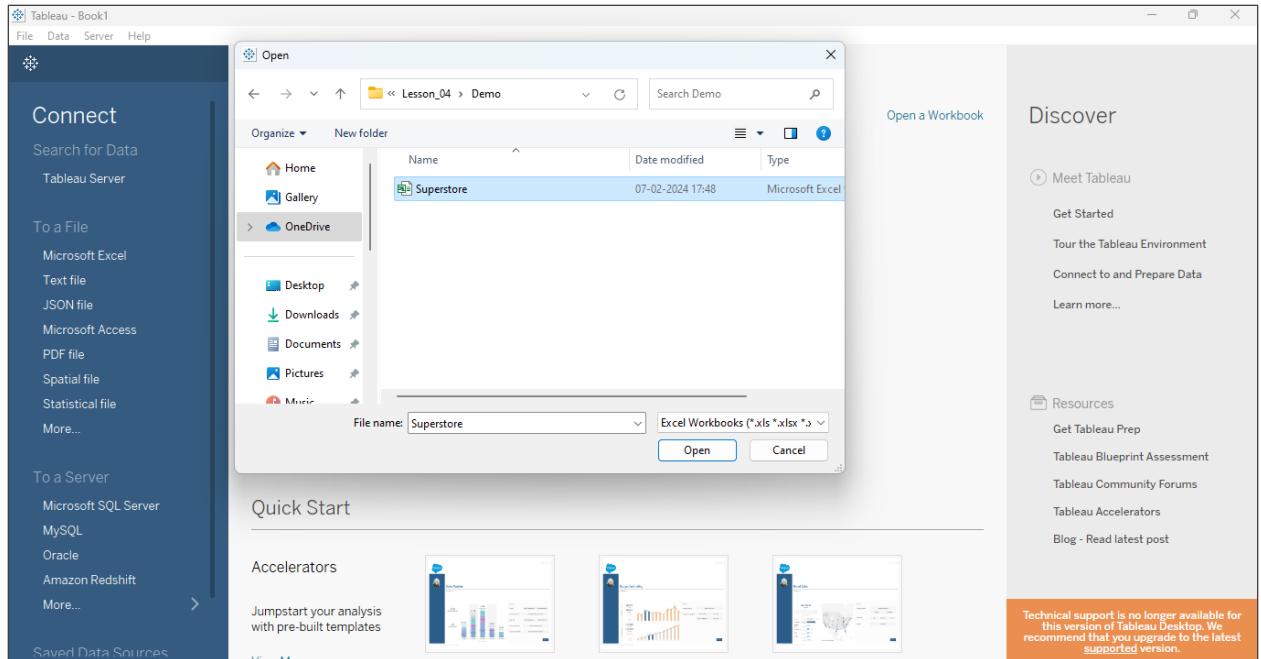
**Note:** Download the **Superstore.xlsx** datasets from the Reference Material section of the LMS

Steps to be followed:

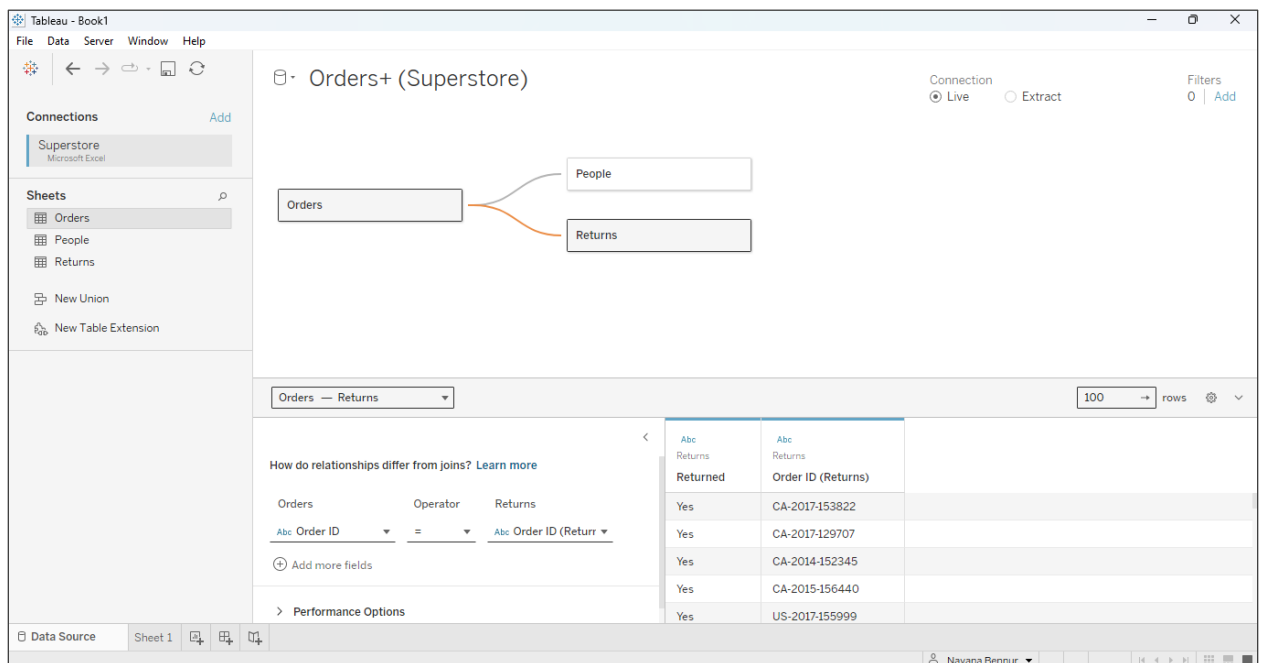
1. Importing and Setting up Data
2. Adding Forecast Line
3. Adding Trend Line
4. Adding Totals
5. Adding Row Totals
6. Adding Column Totals
7. Adding Sub-Totals

#### Step 1: Importing and Setting up Data

- 1.1 Import the **Superstore** dataset

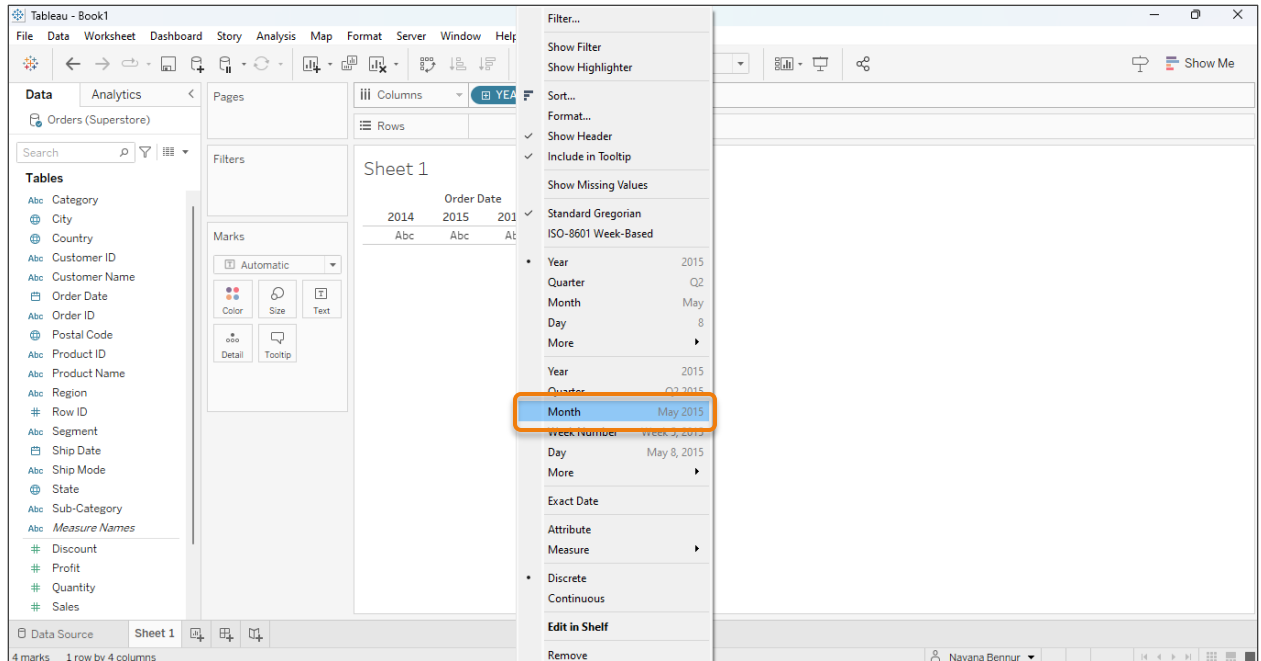


## 1.2 Double right-click on **Orders**, **Peoples**, and **Returns**



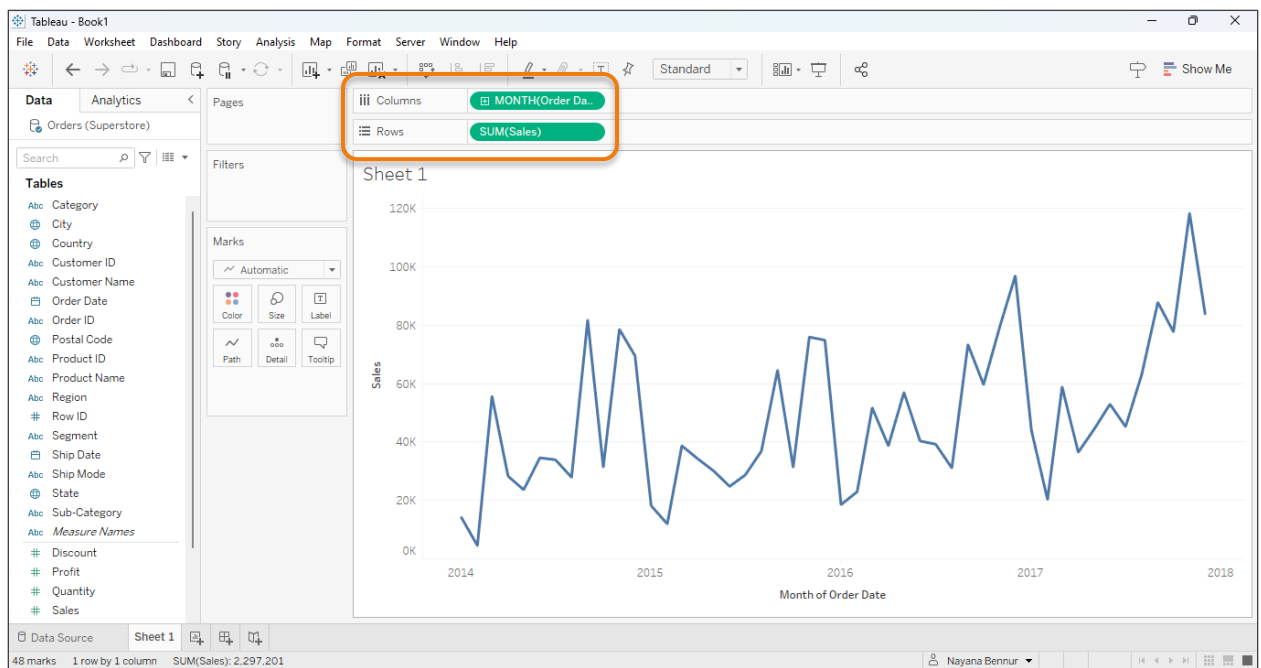
## 1.3 Navigate to **Sheet1**



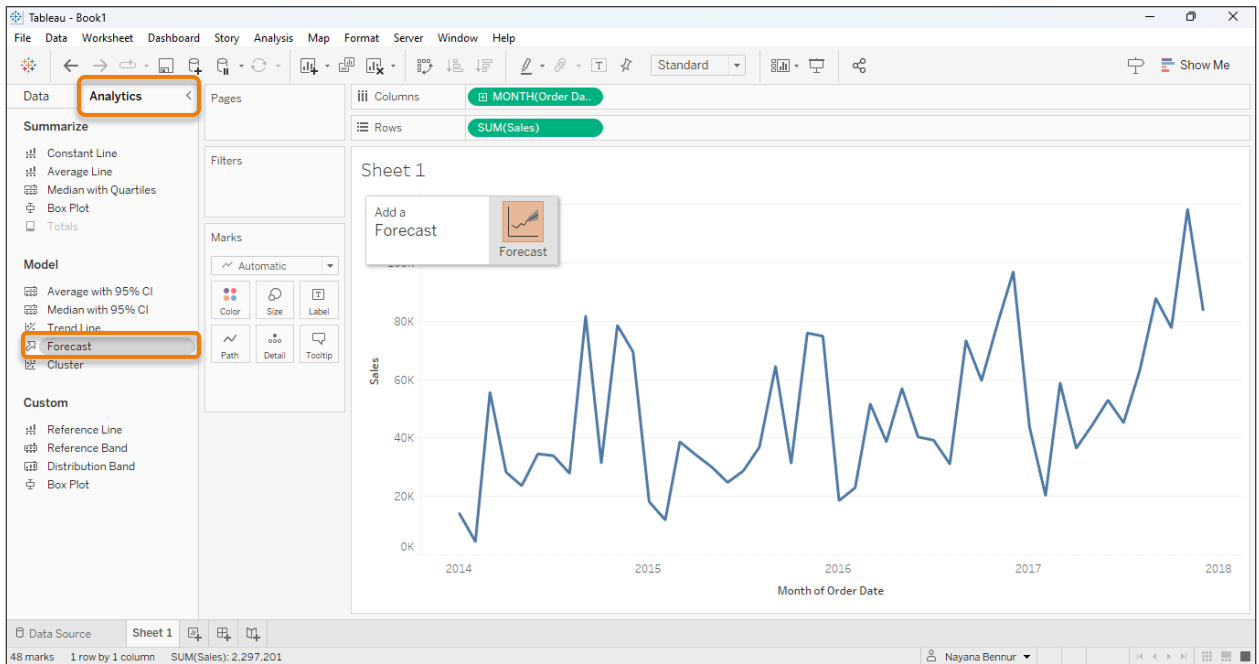


## Step 2: Adding Forecast Line

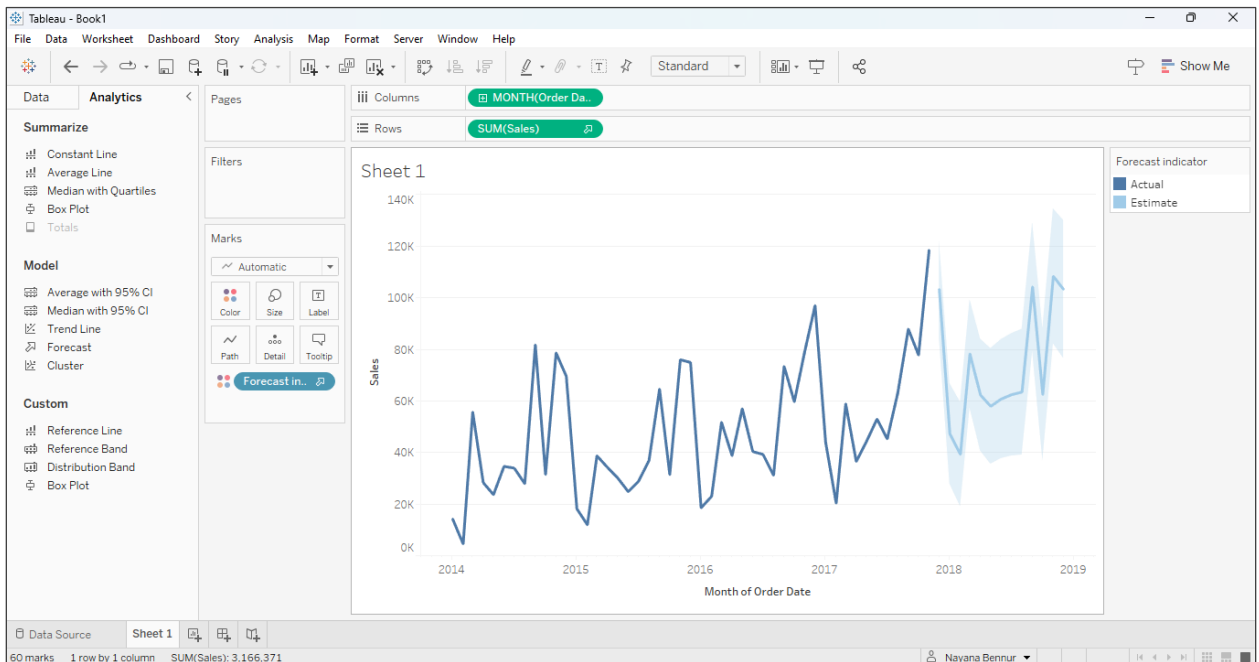
### 2.1 Bring Sales to Rows shelf



2.2 Drag the **Forecast** pill from the Model Section in the **Analytics** Pane onto the chart

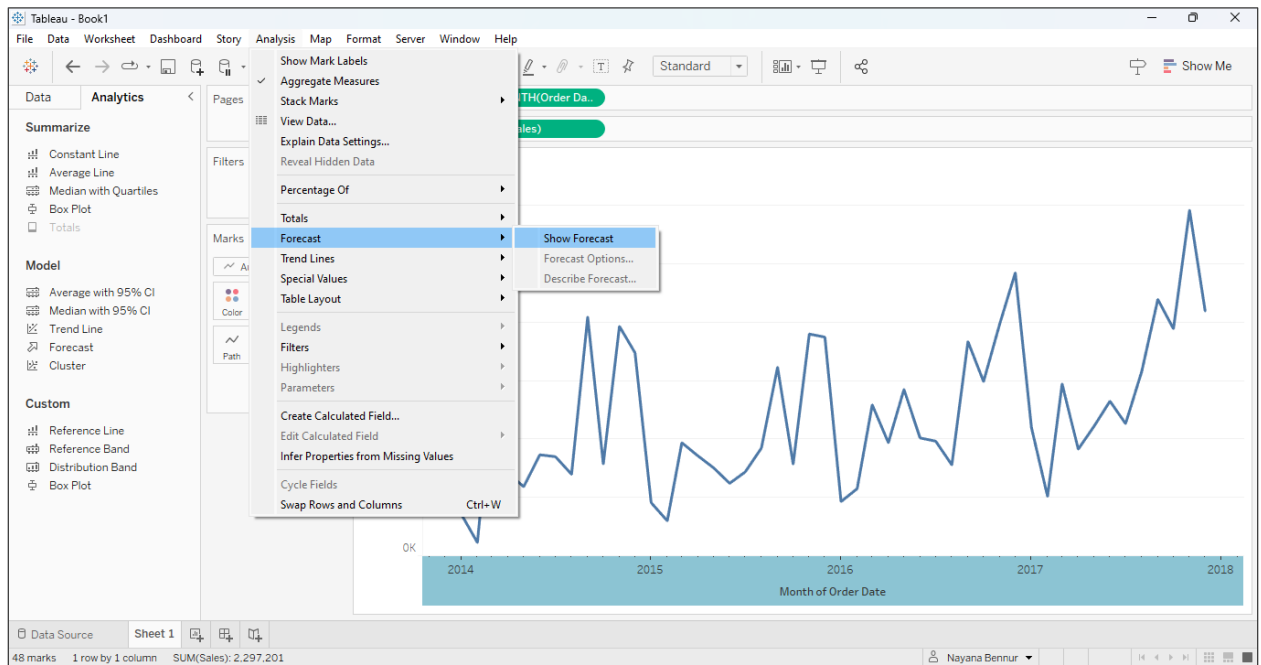


2.3 A forecast line will be added automatically with a legend for **13 months**.

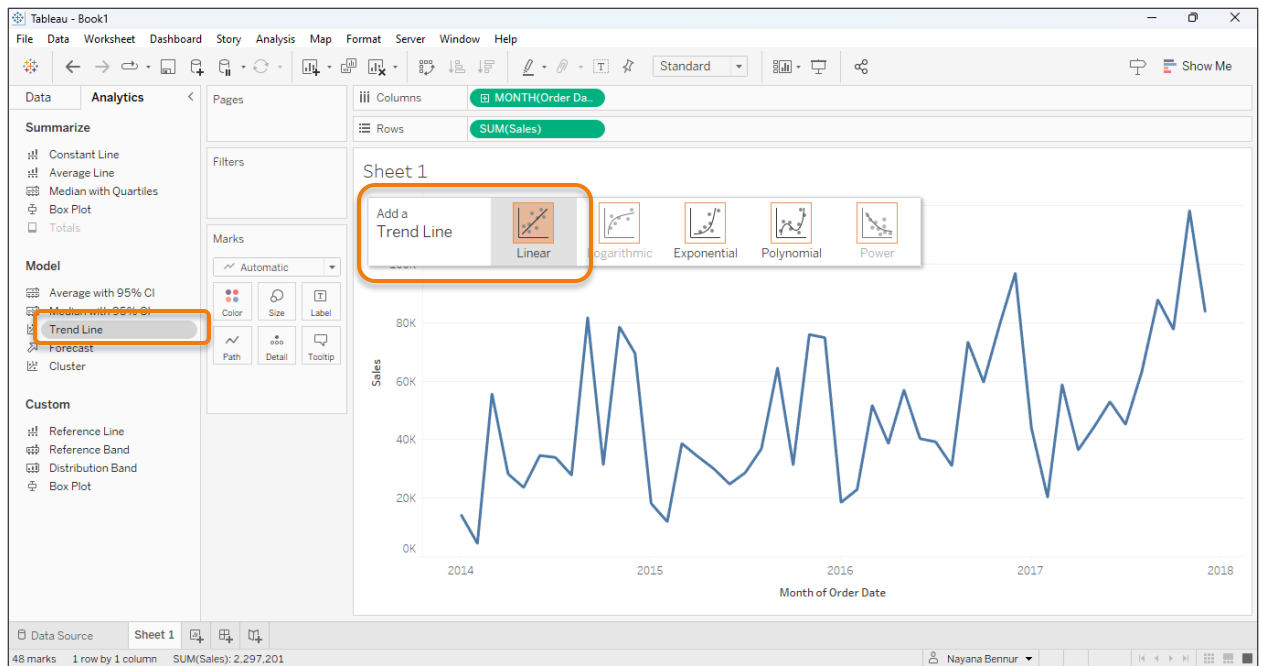


## Step 3: Adding Trend Line

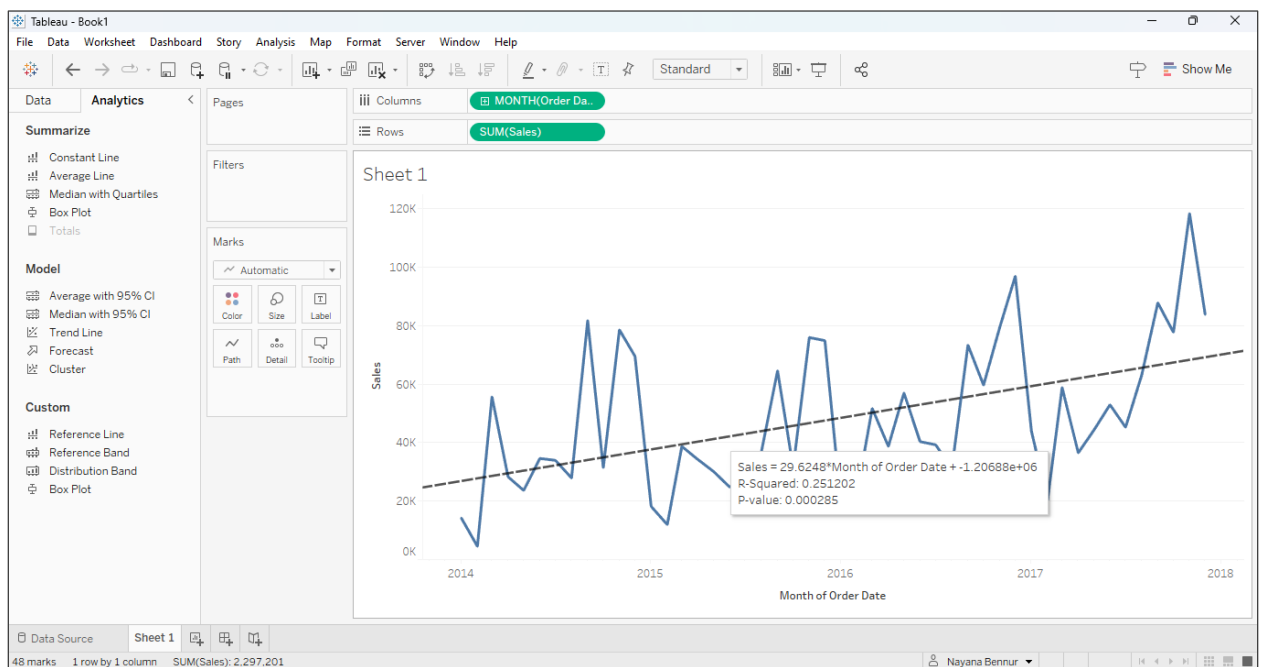
3.1 Remove the Forecast from the chart, go to **Analysis**, and click on **Forecast** and uncheck **Show Forecast**



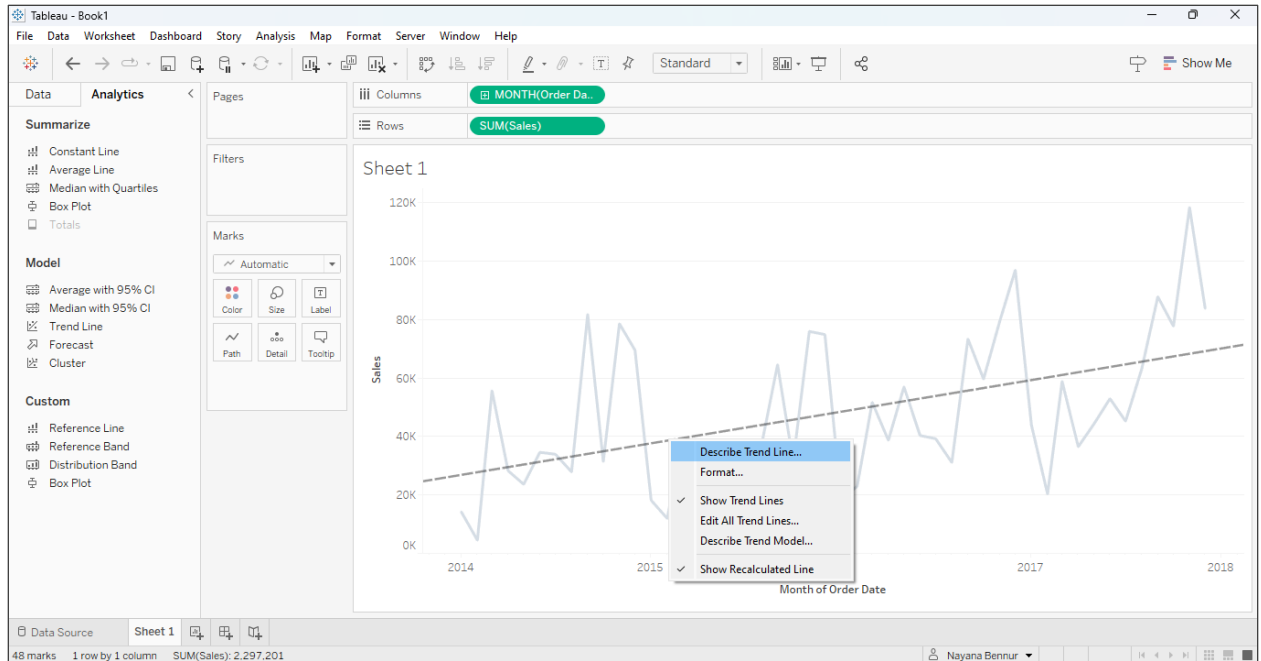
3.2 Drag the **Trend line** pill from the **Analytics** Pane onto the chart



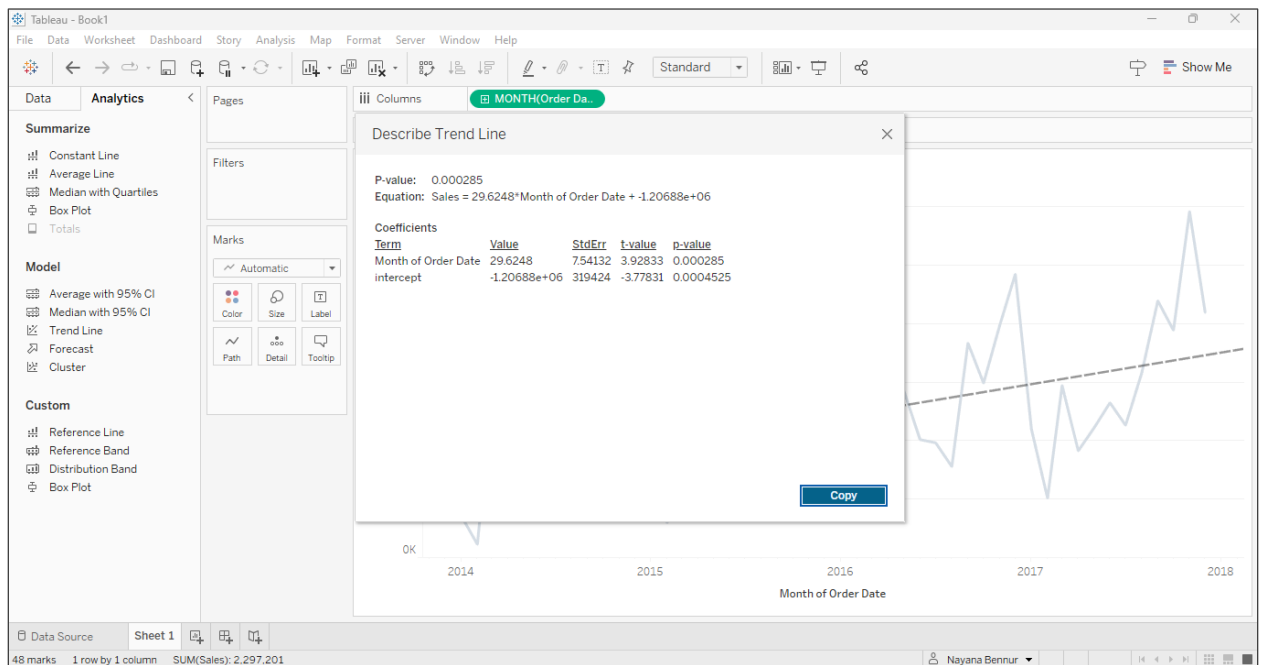
3.3 Hover the cursor on the trend line to view the equation of the line



3.4 Right-click on the **trend line** and choose **Describe Trend Model** to see the Trend Line Model



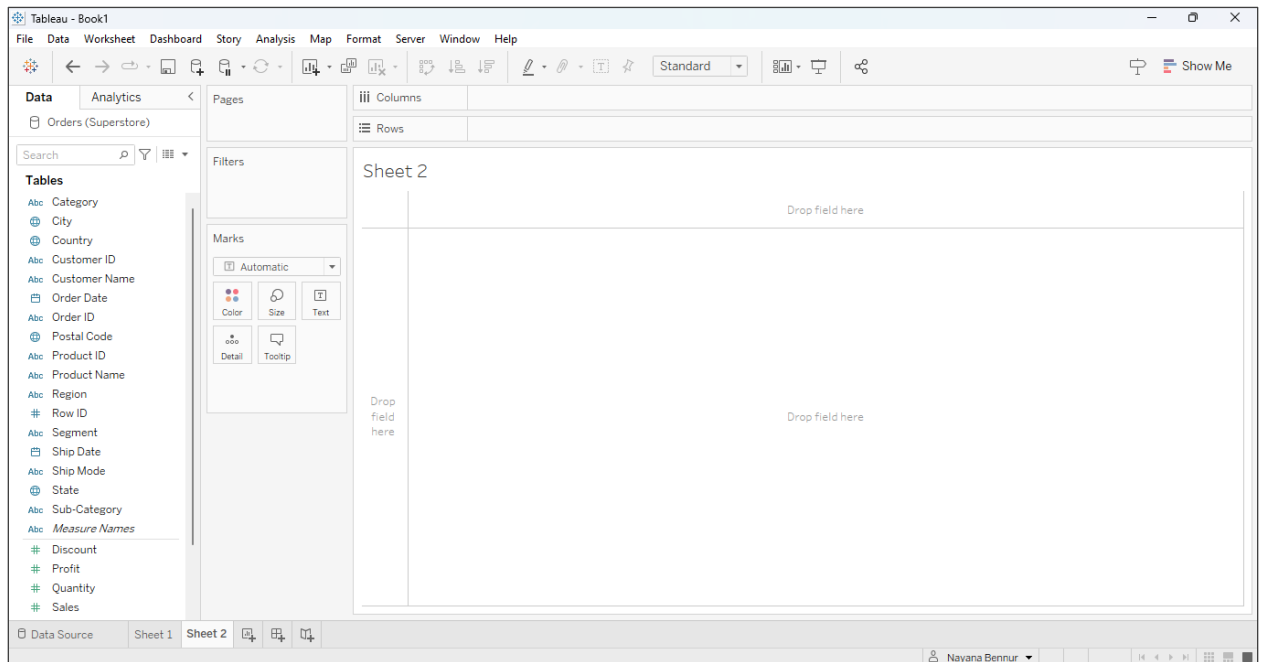
## Output:



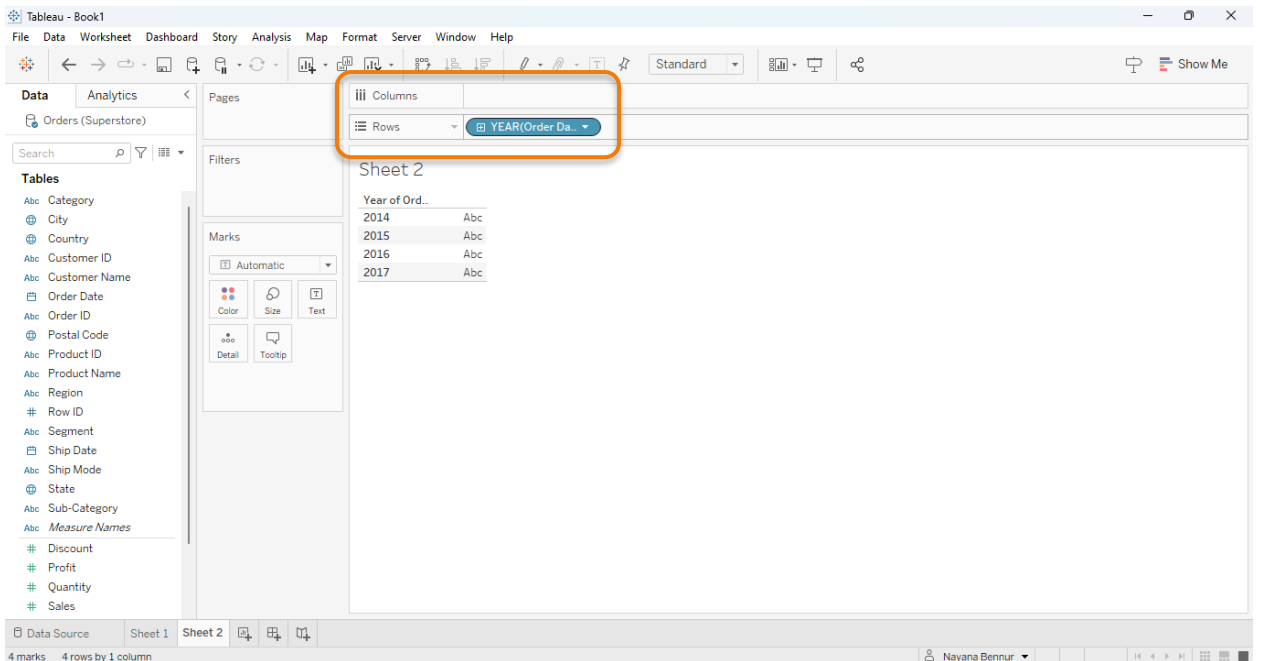
## Step 4: Adding Totals

### 4.1 Navigate to a new worksheet

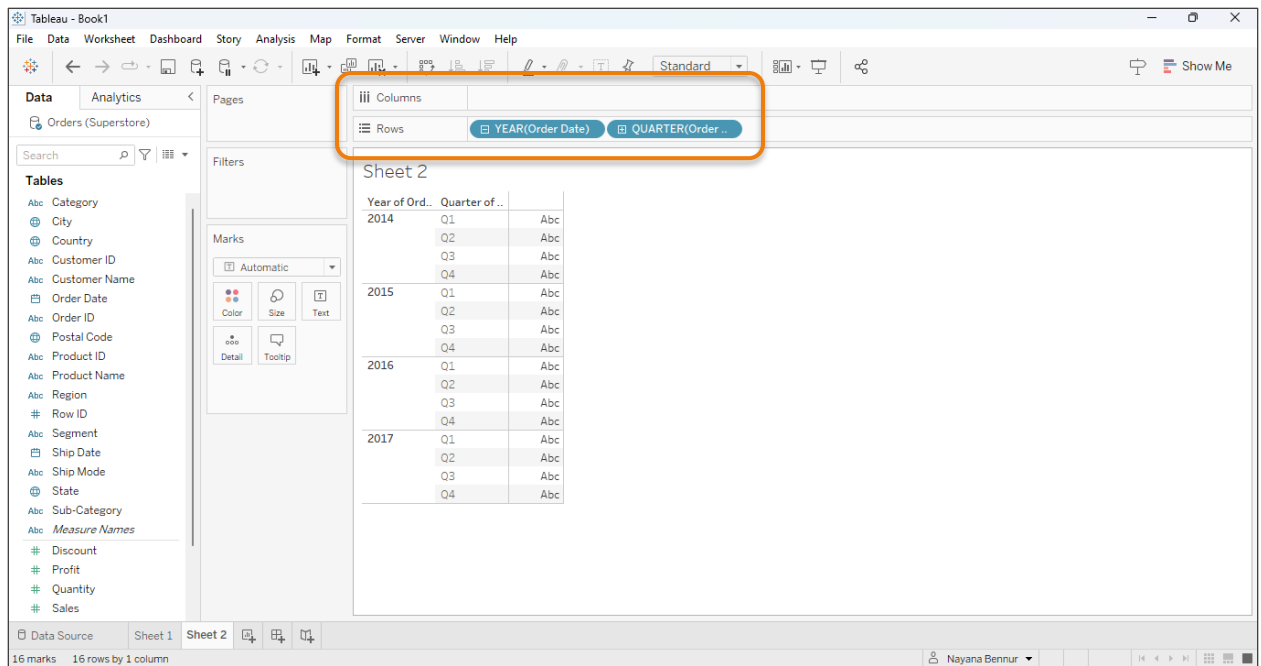




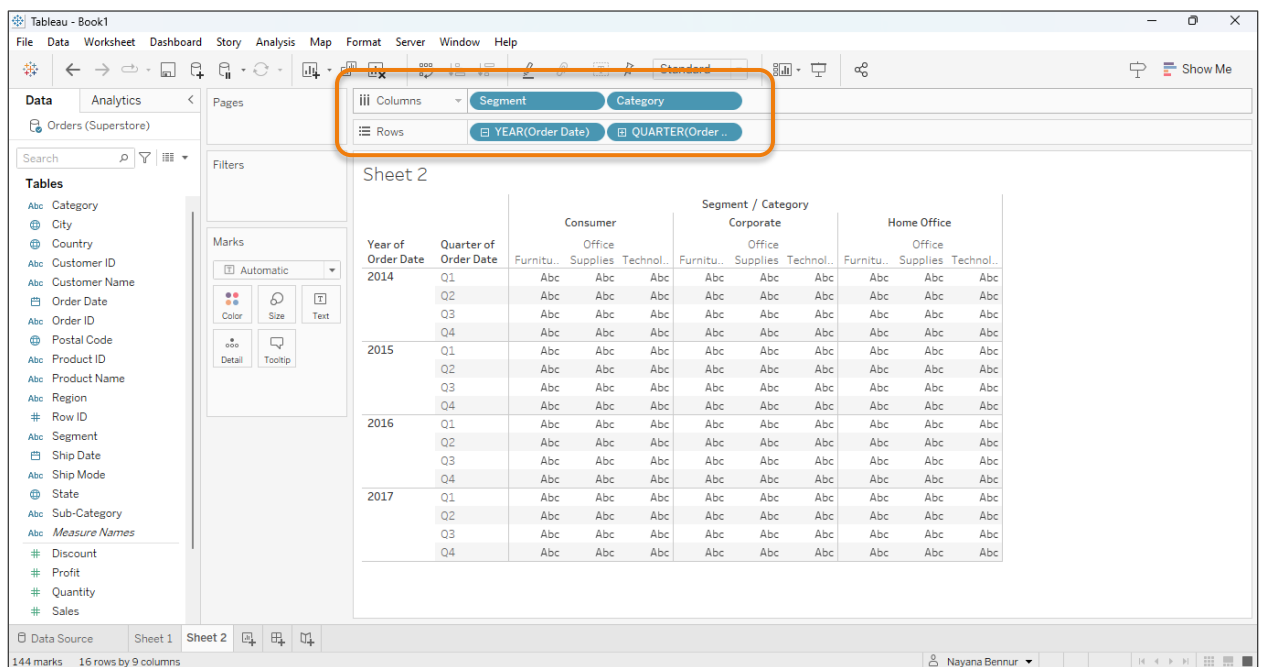
## 4.2 Add **Order Date** to Rows



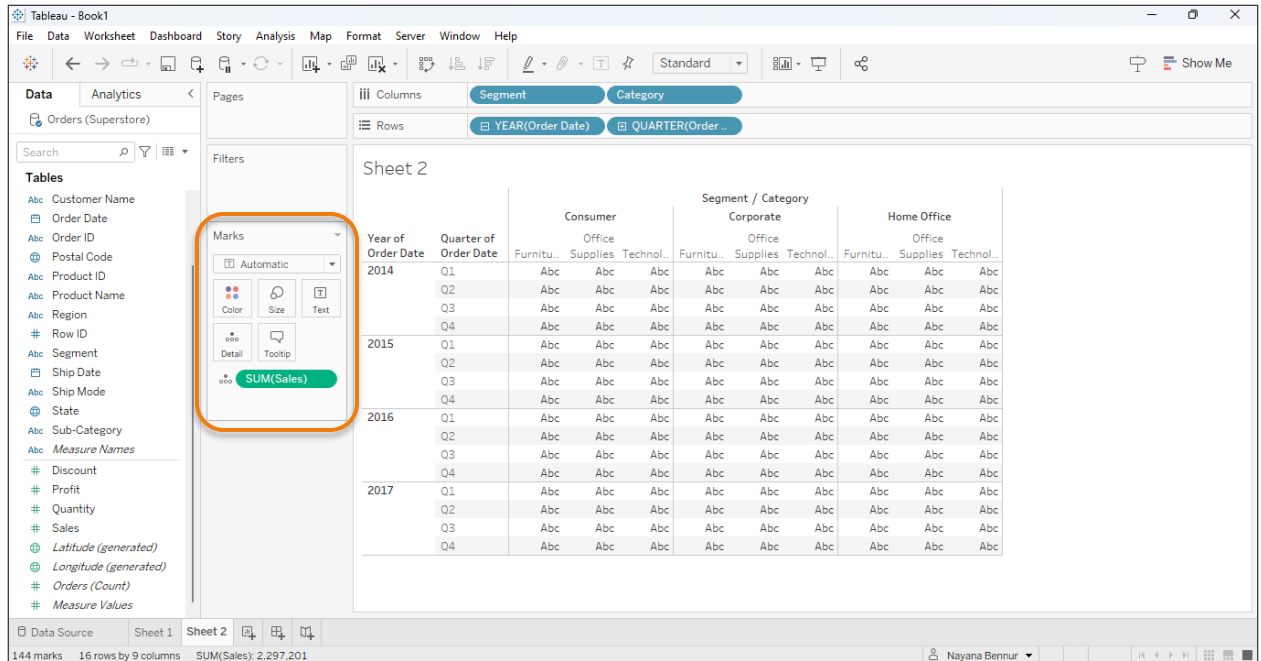
## 4.3 Drag **Order Date** again to Rows



#### 4.4 Add **Segment** and **Category** to Columns

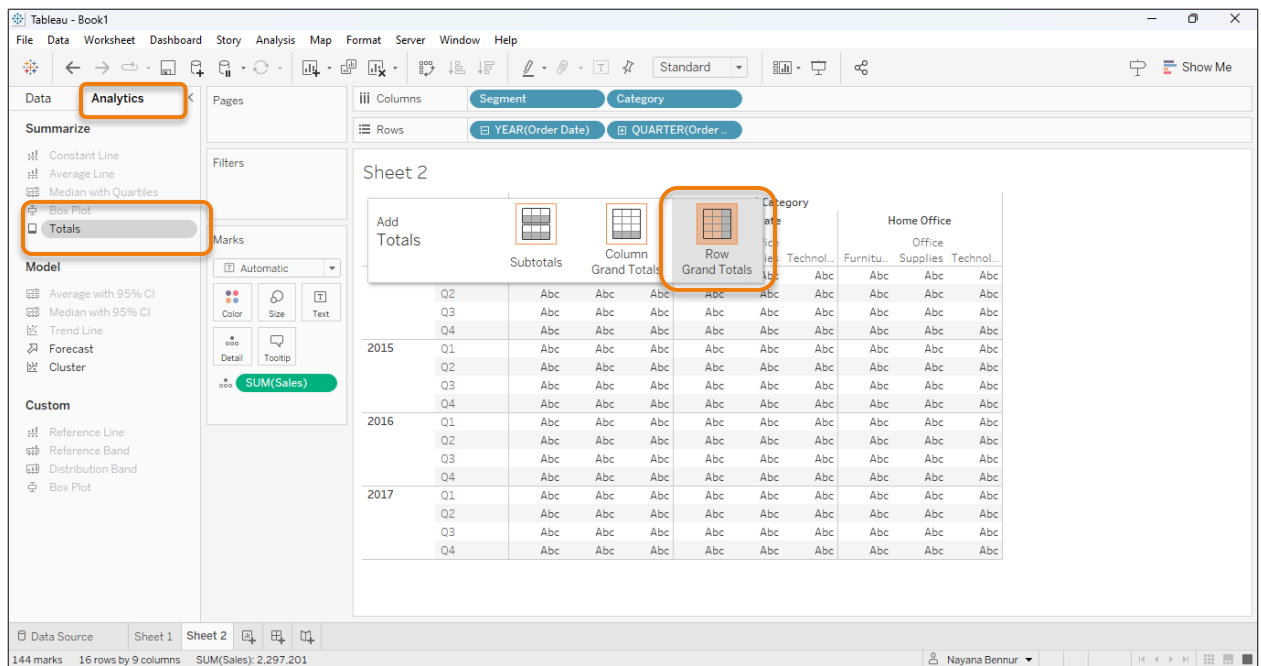


#### 4.5 Drag **Sales** into Text on the **Marks** card to create a Cross Tab



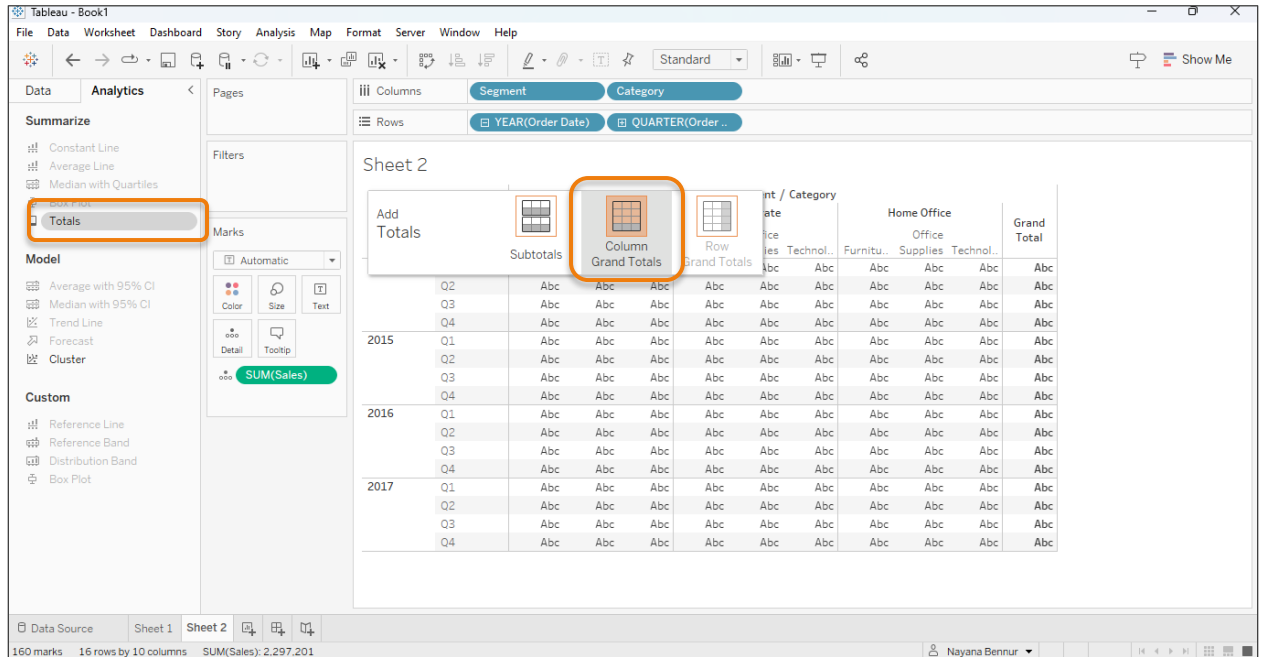
## Step 5: Adding Row Totals

5.1 Go to the **Analytics** Pane, click on **Totals**, and select **Row Grand Totals**



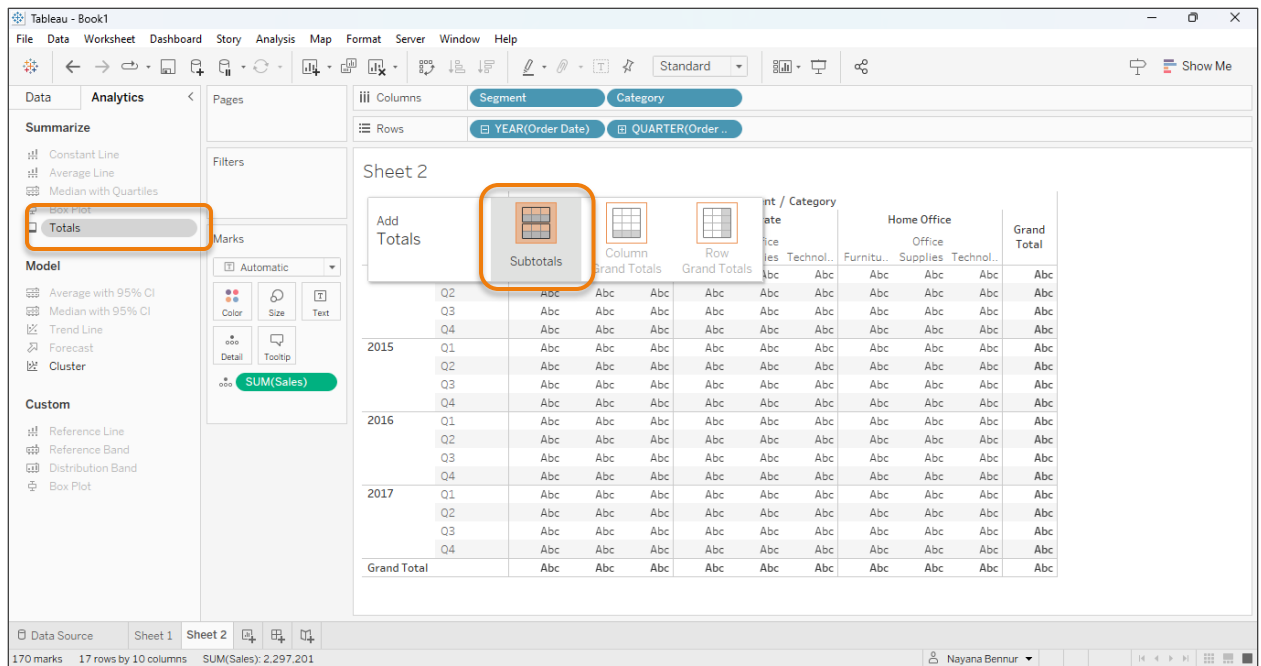
## Step 6: Adding Column Totals

## 6.1 Go to the **Analytics** Pane, click on **Totals**, and select **Column Grand Totals**

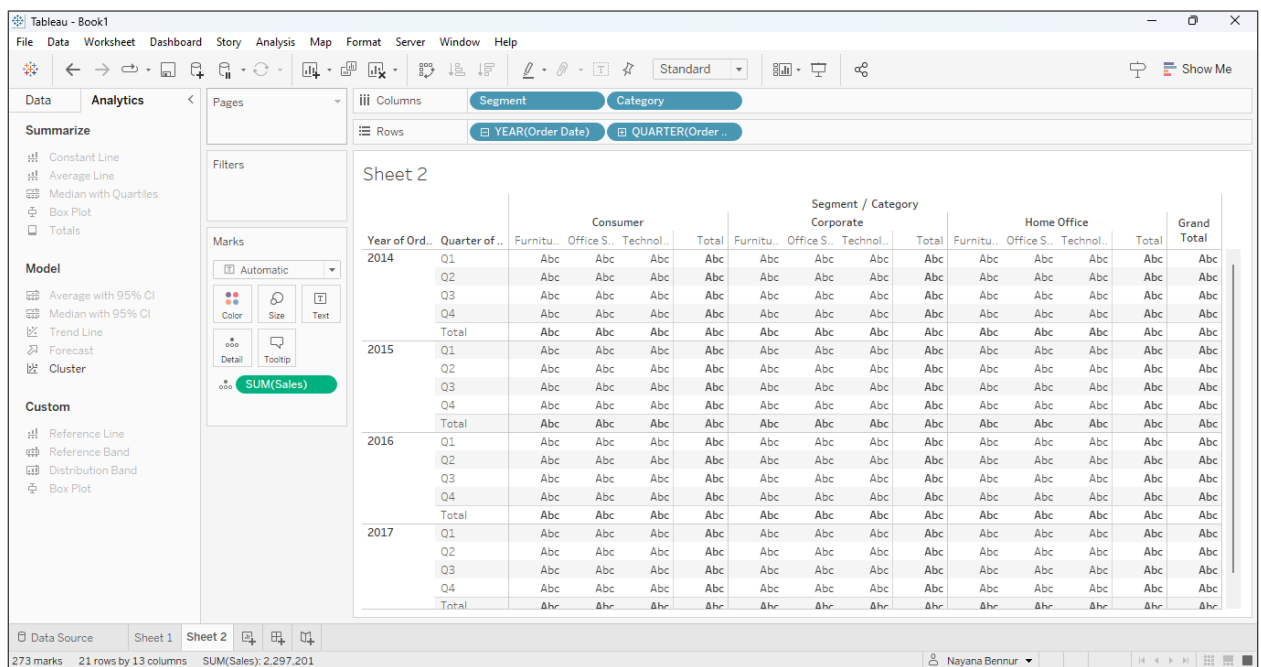


## Step 7: Adding Sub-Totals

### 7.1 Go to the **Analytics** Pane, click on **Totals**, and select **Subtotals**



## Output:



By following these steps, you have successfully added useful features to your charts, such as forecast lines, trend lines, totals, and sub-totals, to gain a better understanding of the data and identify patterns and trends.

