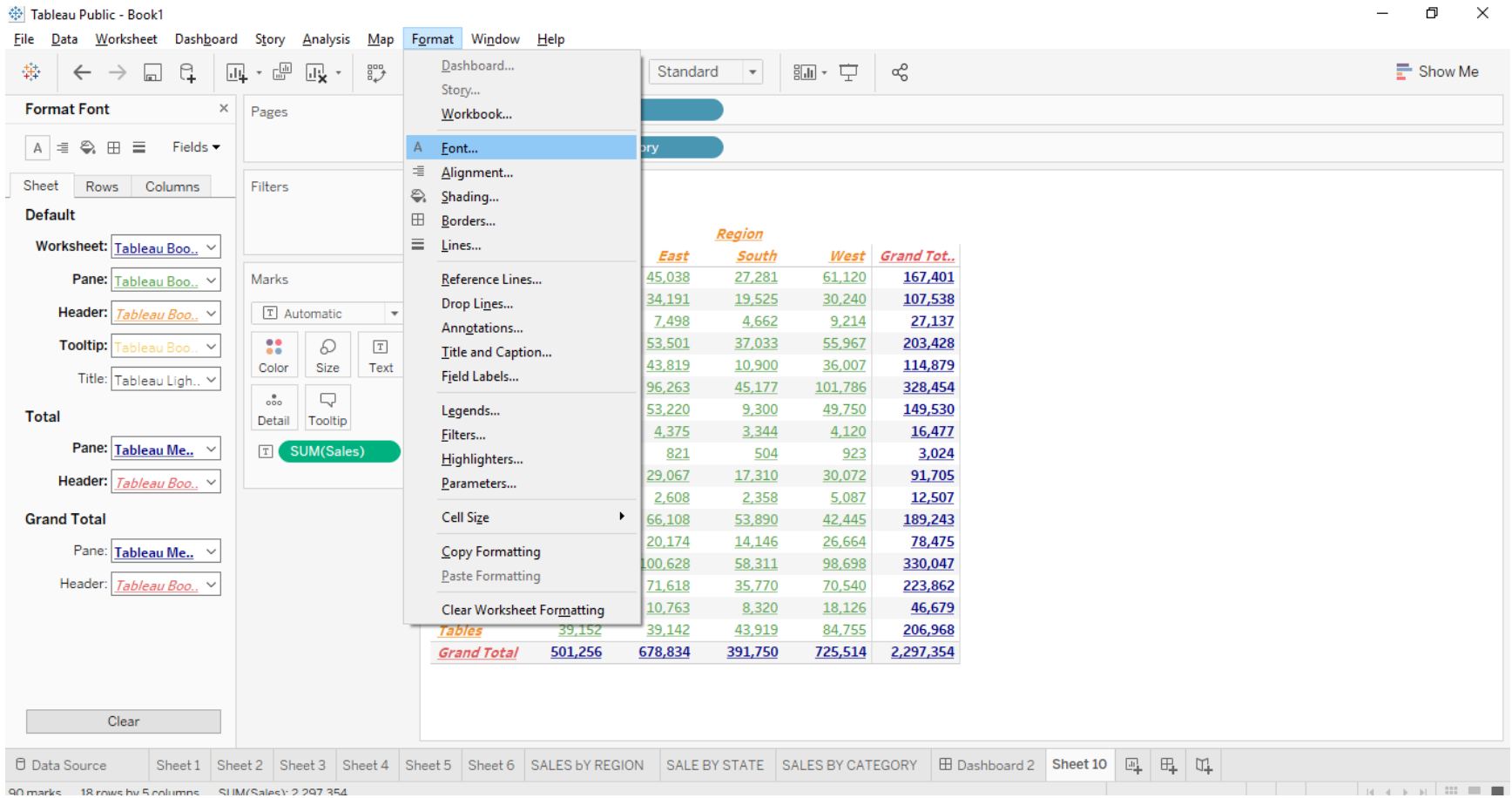
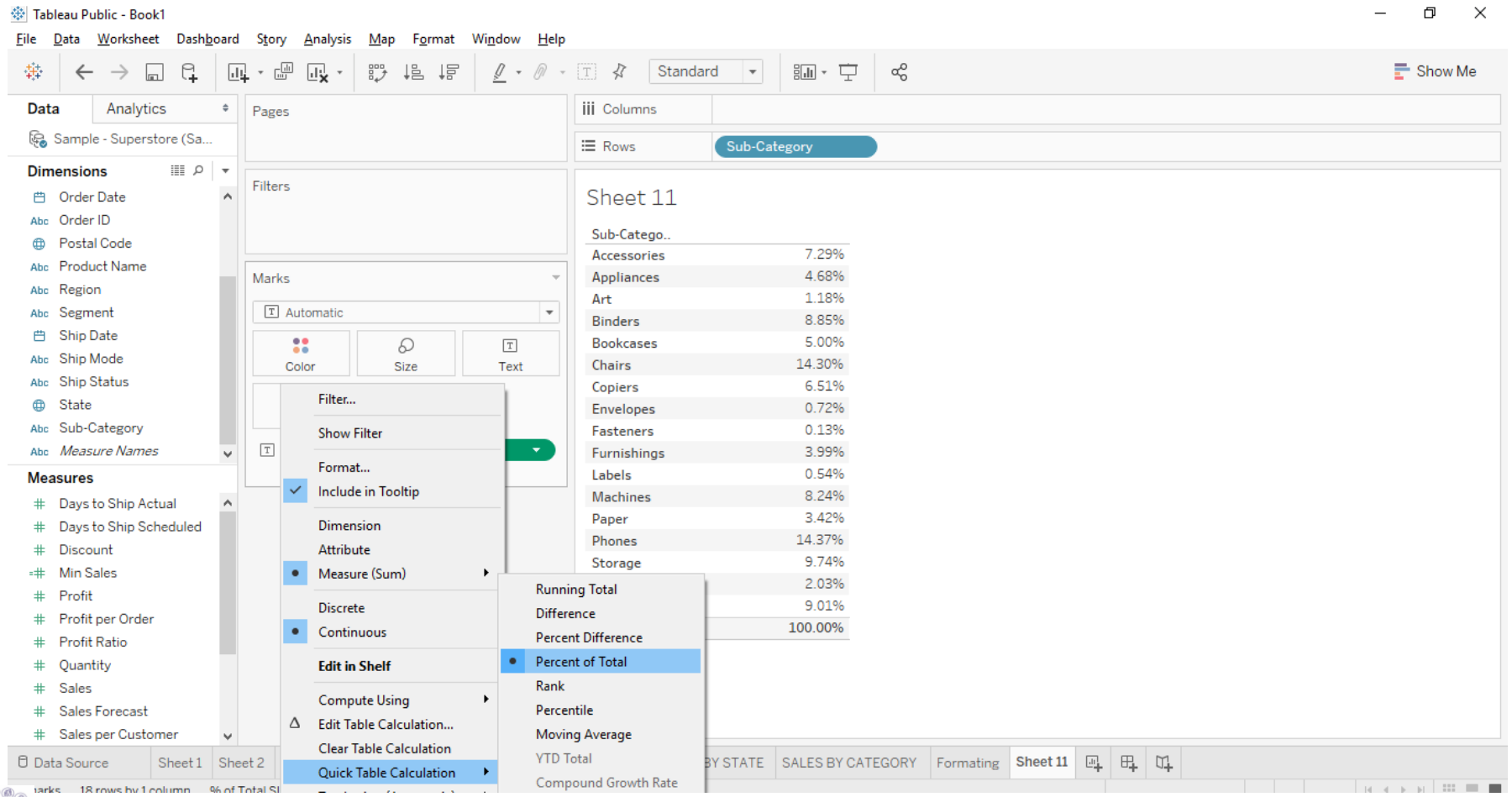
Formatting Data

Tableau also allows us to format the data in various ways. We can change Font, Alignment, Sheet Colors & Borders



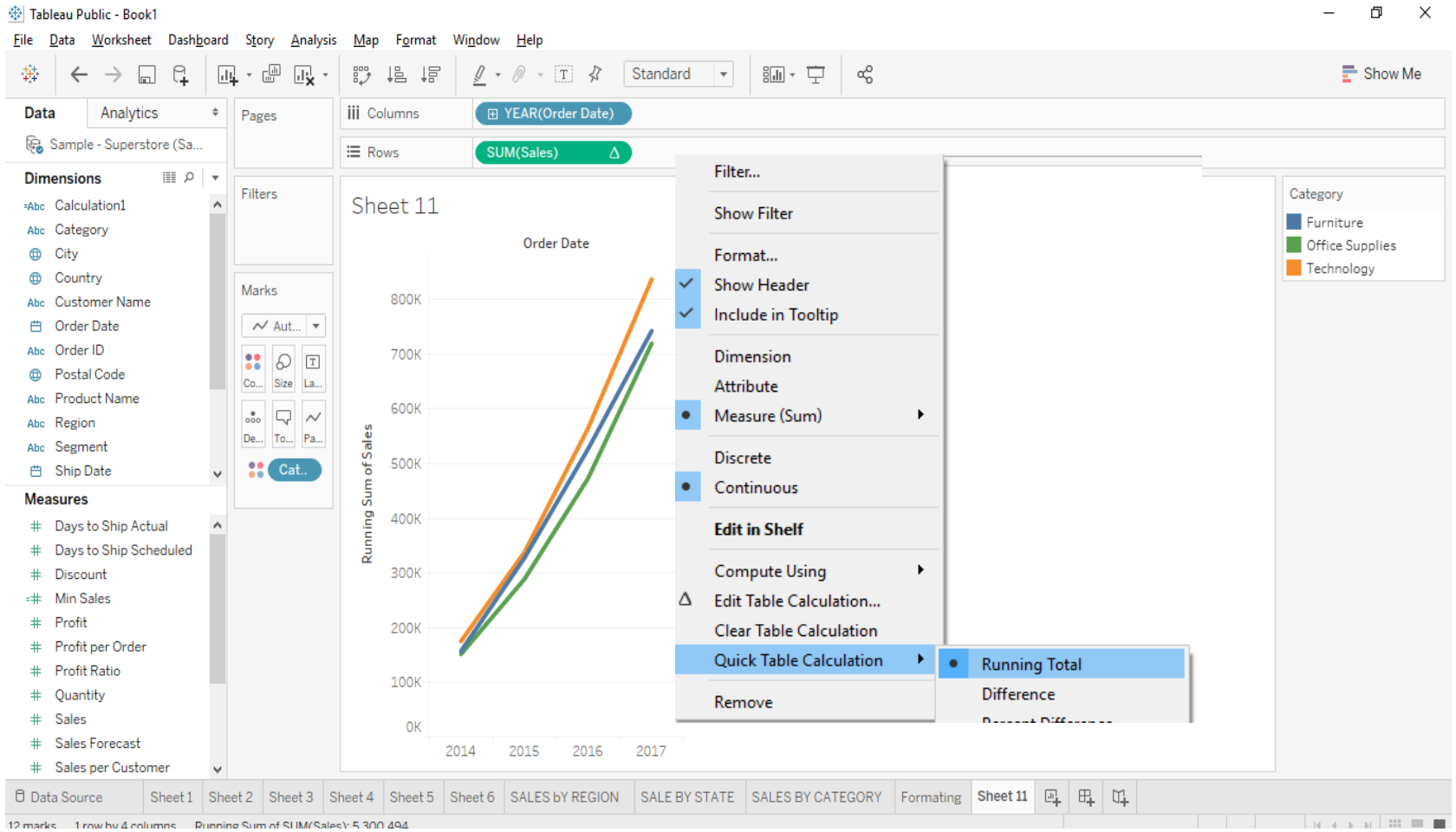
Calculations

Table Calculations (Percentage of Total **):** These are the calculations we do on the output received.



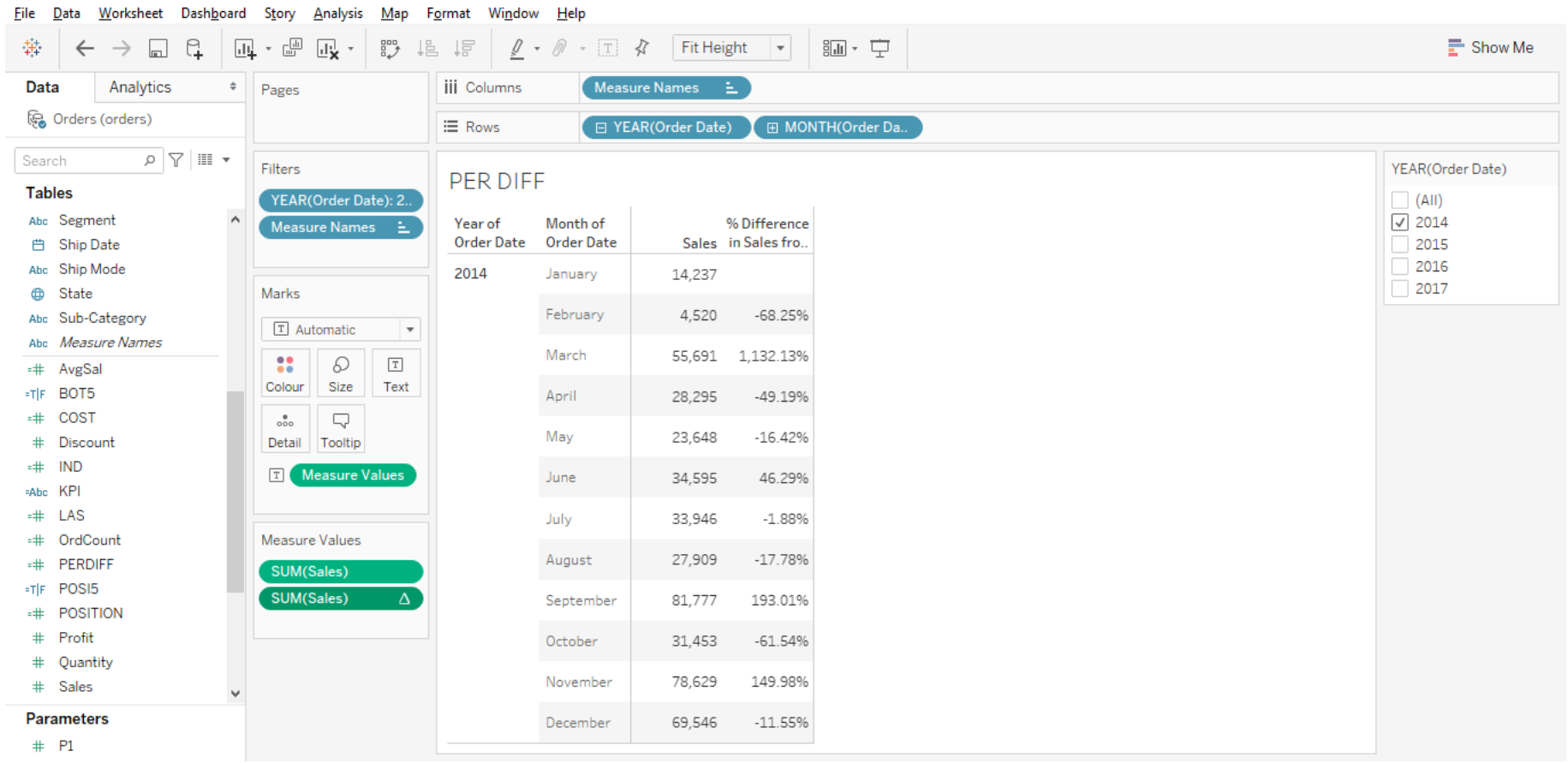
Calculations

Table Calculations (Running Total)**:** These are the calculations we do on the output received.



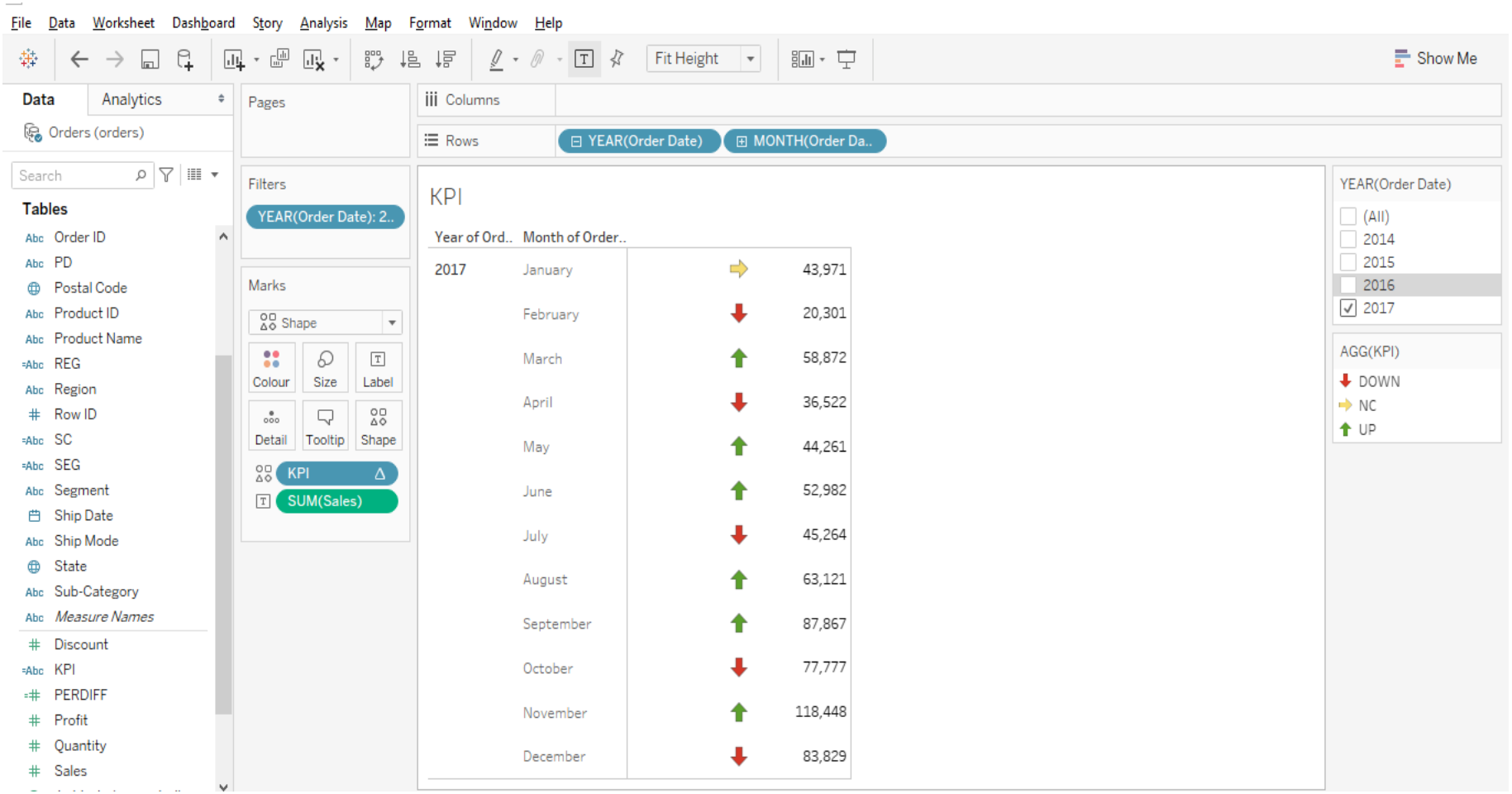
Calculations

Table Calculations (Percentage Difference) **:** Gives the percentage difference between previous & current value



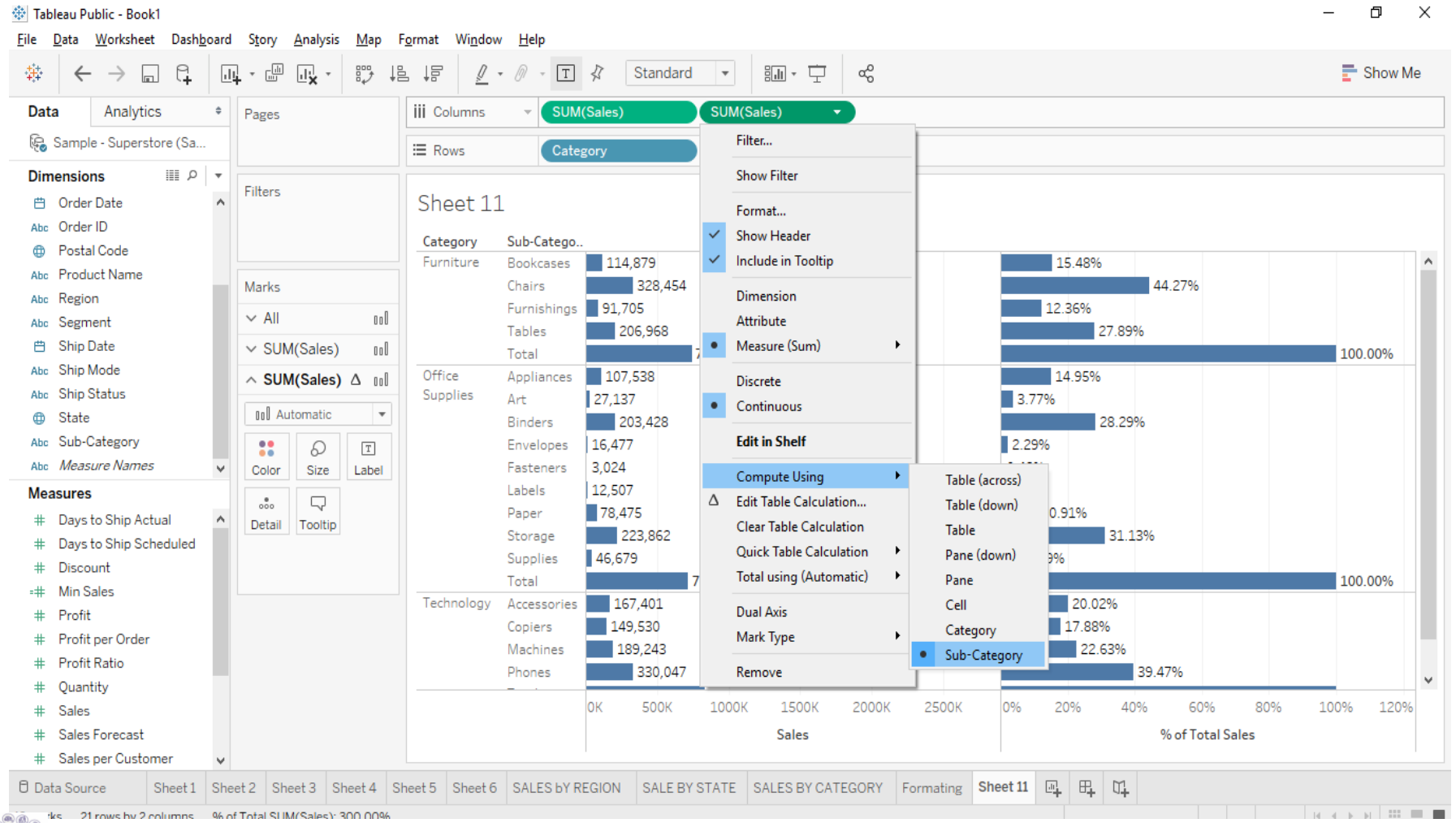
Calculations

KPI (Key Performance Indicators) **:** highlight the trend of the value.



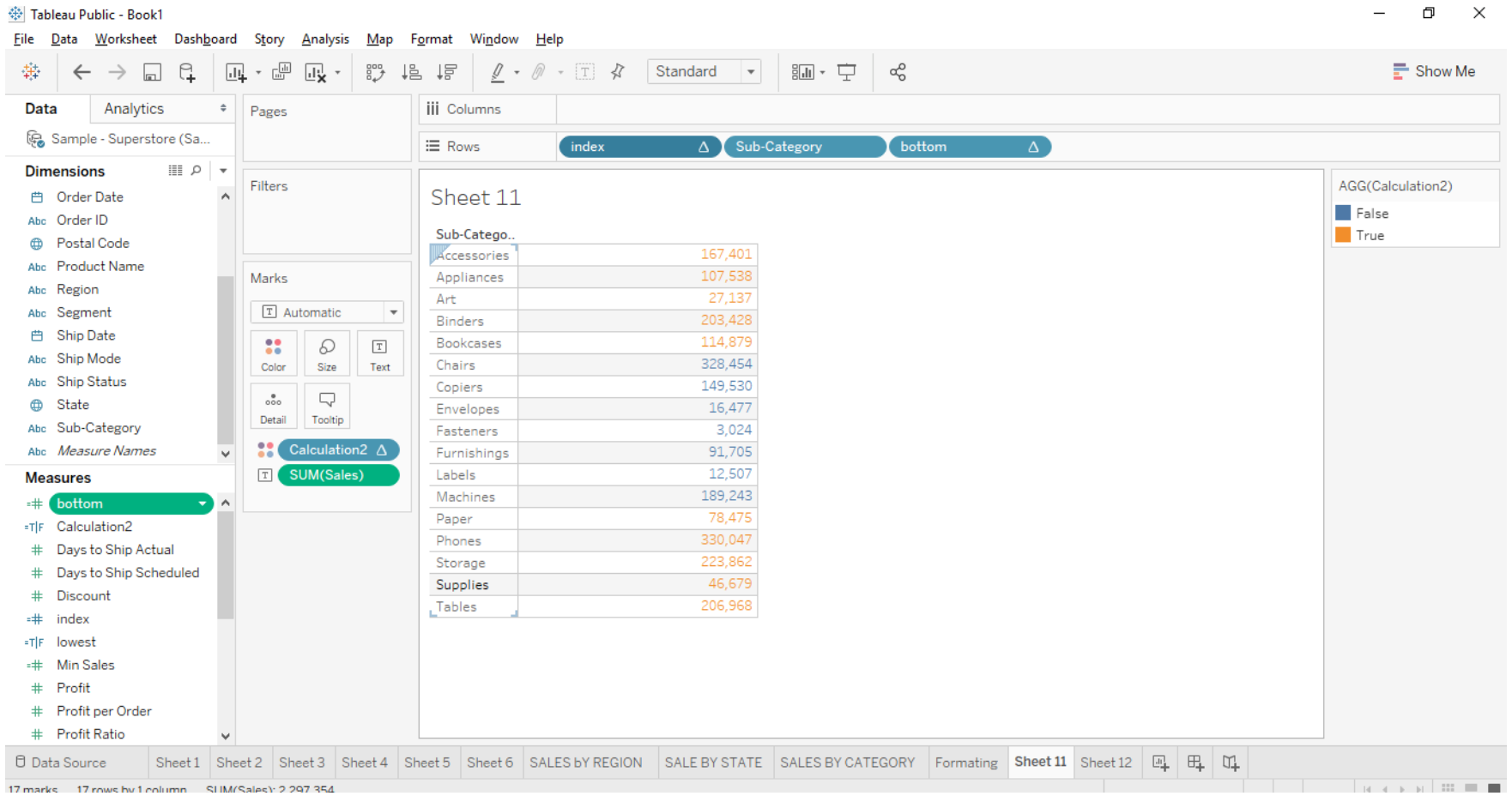
Calculations

Compute Using: It is the advance feature of quick table calculations.



Calculations

Conditional Formatting : Formatting the data as per some condition.
For Eg: Highlighting the top 5 or bottom 5 sales.



NOTE: We need index & last function to implement conditional formatting.

Tableau Public - Book1

File Data Worksheet Dashboard Story Analysis Map Format Window Help

Standard

Data | Analytics

Clipboard_20180210T07...
Sample - Superstore (Sa...

Dimensions

- Order Date
- Order ID
- Postal Code
- Product Name
- Region
- Segment
- Ship Date
- Ship Mode
- Ship Status
- State
- Sub-Category
- *Measure Names*

Measures

- Days to Ship Actual
- Days to Ship Scheduled
- Discount
- index
- Last
- Profit
- Profit per Order
- Profit Ratio
- ProfitCategory
- Quantity

Pages

Filters

Marks

Automatic

Color | Size | Text | Detail | Tooltip

AGG(ProfitCat..
SUM(Profit)

Columns

Rows: Sub-Category | AGG(ProfitCategory)

IF-ELSE 2

Sub-Catego..	ProfitCateg..	
Copiers	OK	55,618
Phones	OK	44,492
Accessories	OK	41,932
Paper	OK	34,053
Binders	OK	30,200
Chairs	OK	26,586
Storage	OK	21,280
Appliances	OK	18,132
Furnishings	OK	13,070
Envelopes	LowProfit	6,956
Art	LowProfit	6,530
Labels	LowProfit	5,558
Machines	LowProfit	3,387
Fasteners	LowProfit	952
Supplies	LowProfit	-1,187
Bookcases	LowProfit	-3,479
Tables	LowProfit	-17,733

Source | Sheet 1 | Sheet 2 | COMPUTE USING | ComputeUsing2 | conditionalFormatting | Rank | IF-ELSE | IF-ELSE 2

17 rows by 1 column SUM(Profit): 286,347

ASSIGNMENT

1. Display sub category & Region wise profit in the tabular format. Format the worksheet with black background. Font in bright color, no banding in rows/columns. Heading should be highlighted in different color.
2. Display in a form of horizontal bar chart category & subcategory wise total sales & Sales percentage. Percentage should be with respect to Category.
3. Represent year wise profit (running total)
4. Represent subcategory wise profit. Use conditional formatting to highlight top & bottom profit generating subcategory. The number should be dynamic.
5. Display monthly profit in a tabular format. Order date should be interactive. Increase & decrease should be highlighted using arrow.

CHARTS

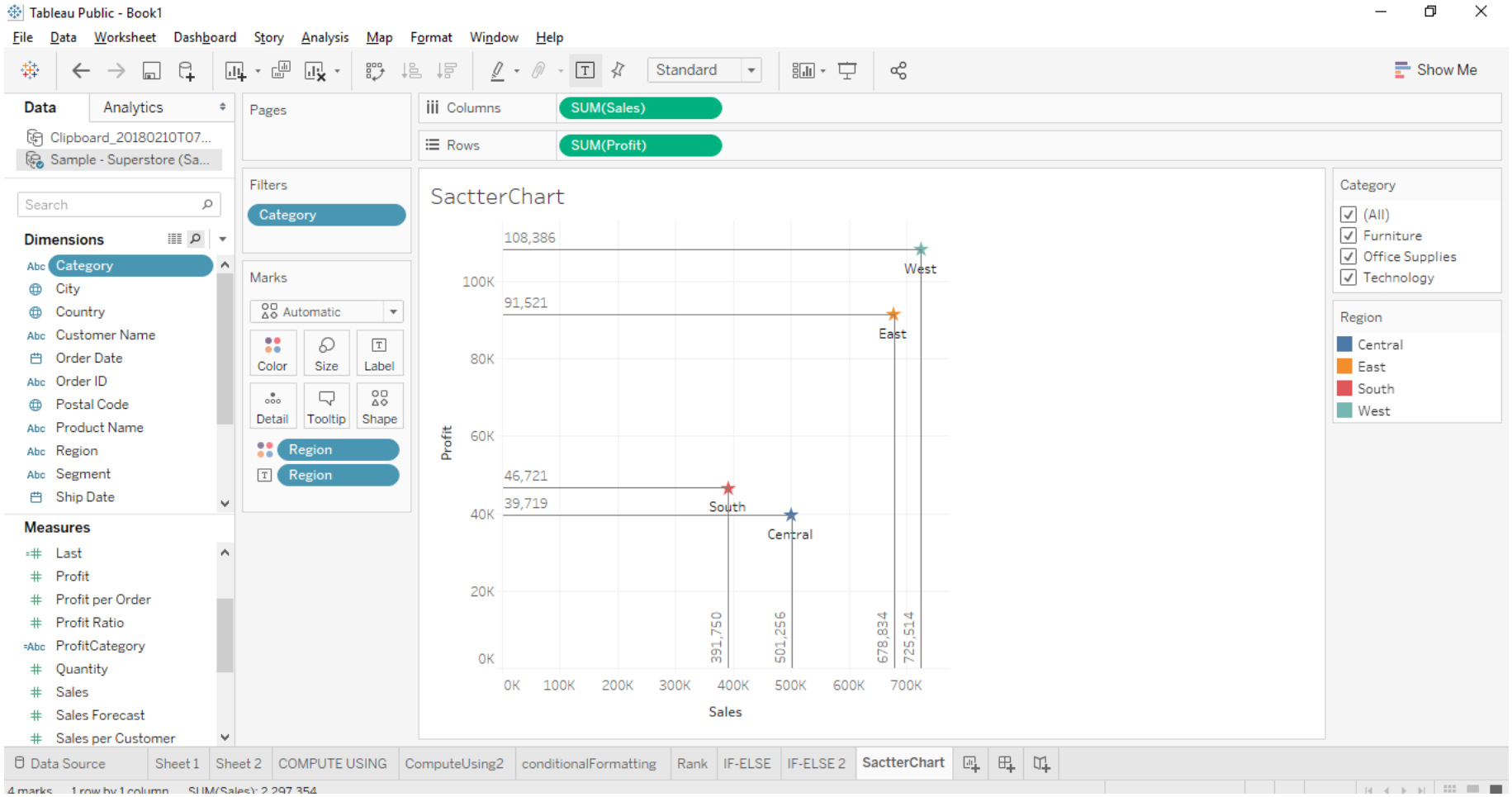
Using Tableau we can create 24 different type of charts. Tableau gives us the best suited chart as per the dimensions and measures selected by us using Visualization Query Language.

If we select Dimension First and Measure second we will get a text.

If we select Measure first and Dimension second we will get a graph.

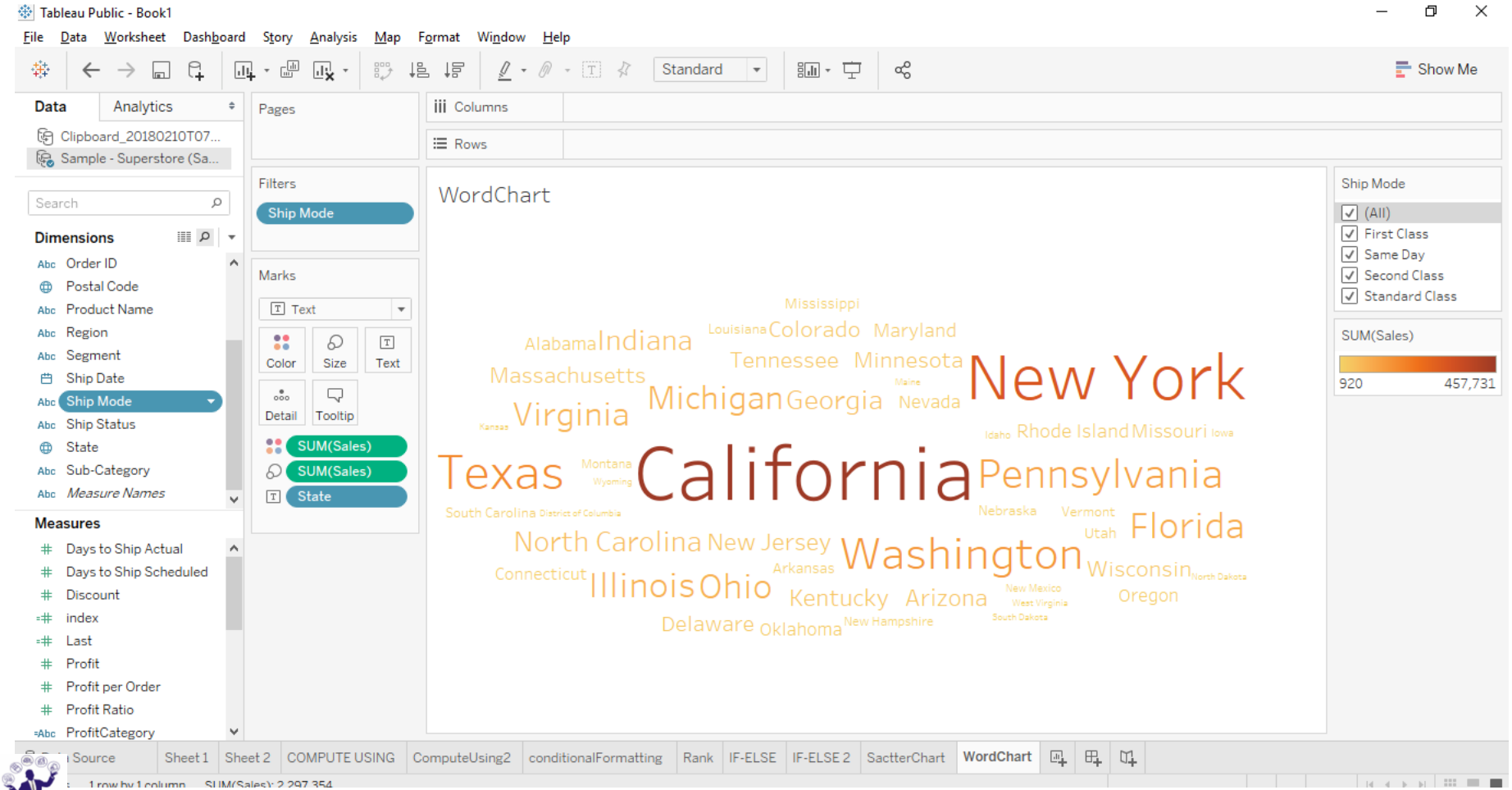
CHARTS

Scatter Charts: In scatter chart we get few points scattered on the plot area.



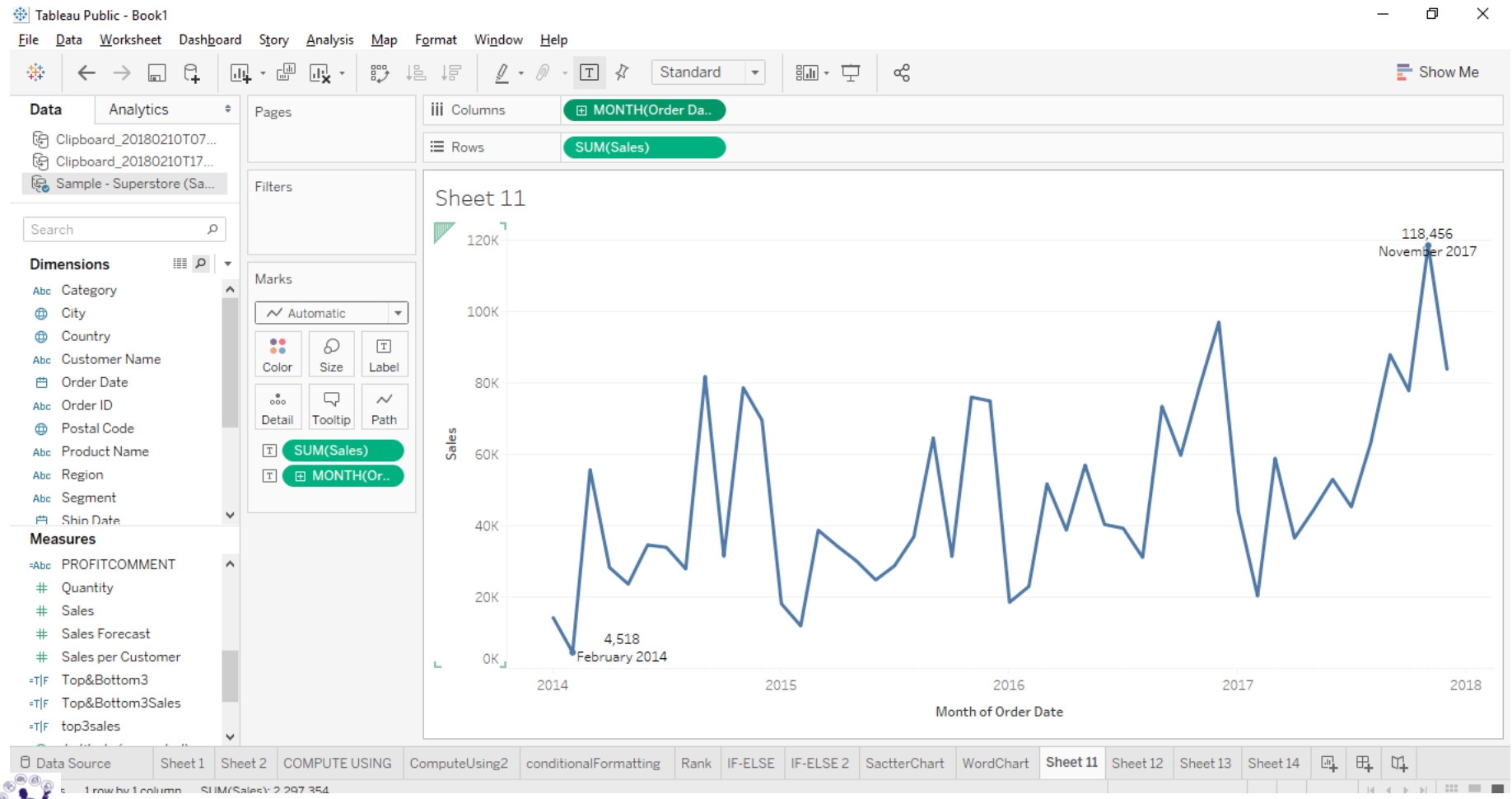
CHARTS

Word Maps: Dimension is displayed in different colors & size as per the measure value.



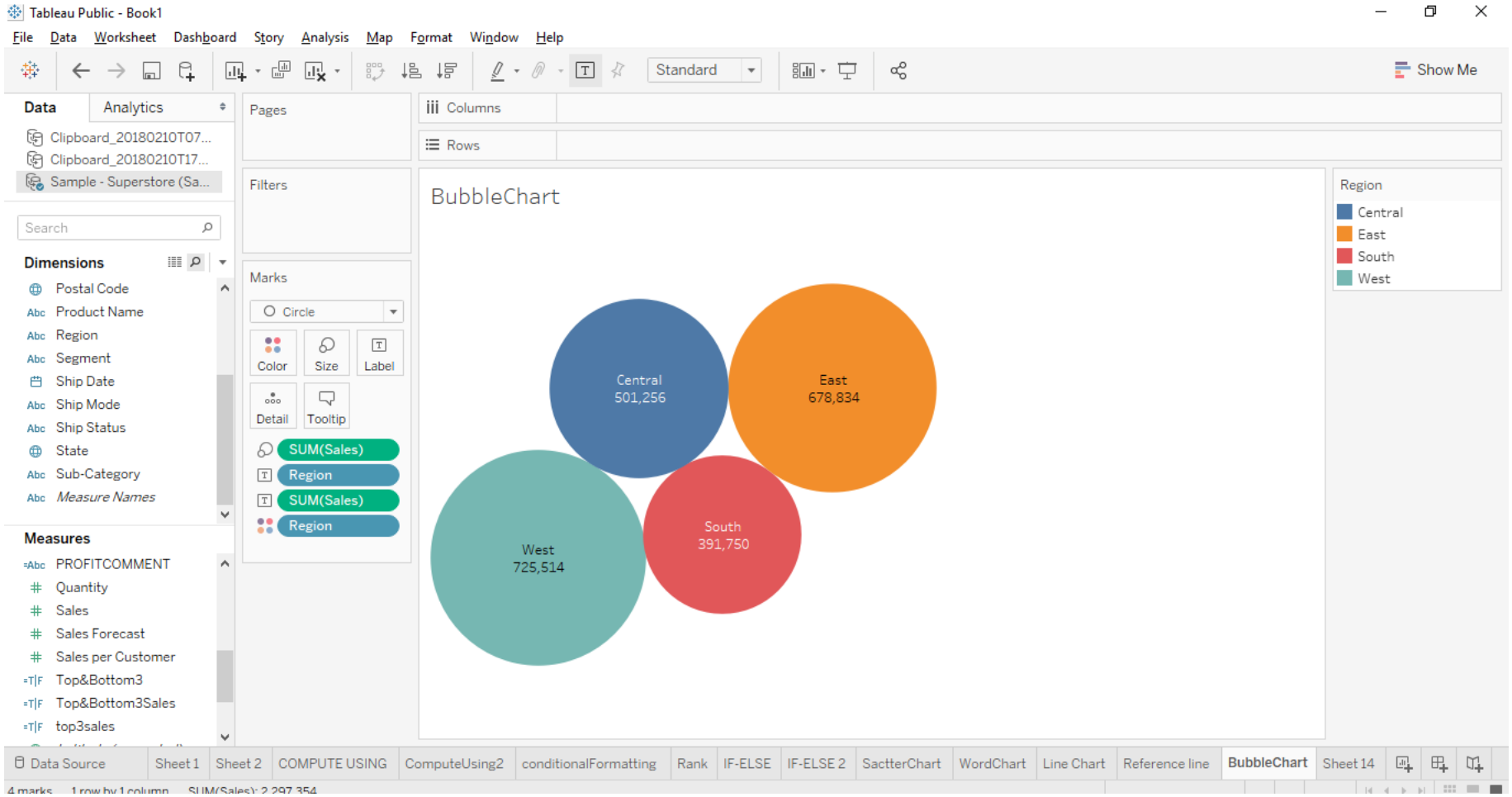
CHARTS

Line Chart: Tableau automatically gives a line chart when we are working with date field. A line chart can be continuous (Green) or discreet (Blue).



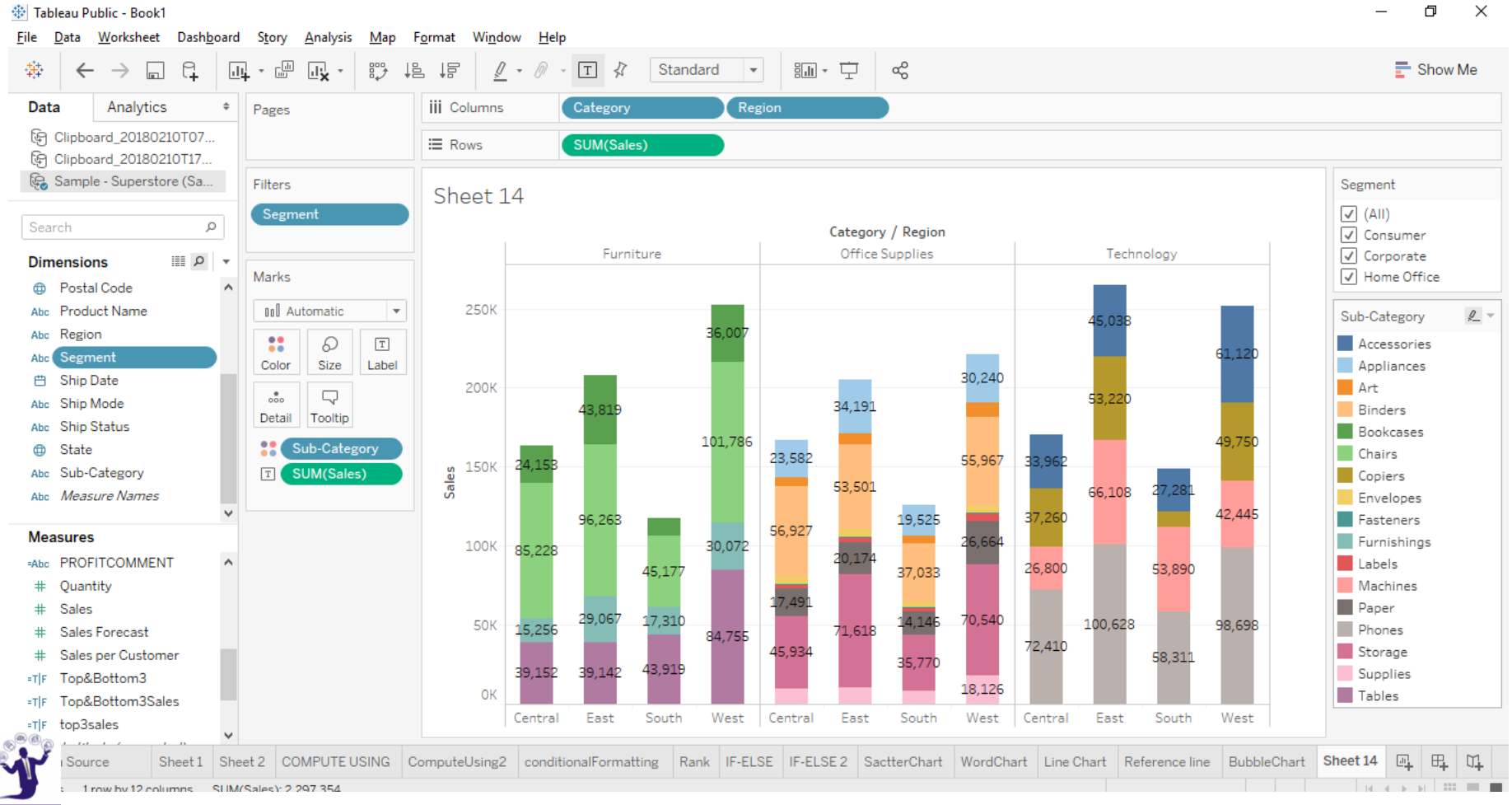
CHARTS

Bubble Chart: Circle represent dimensions & Size represents measures.



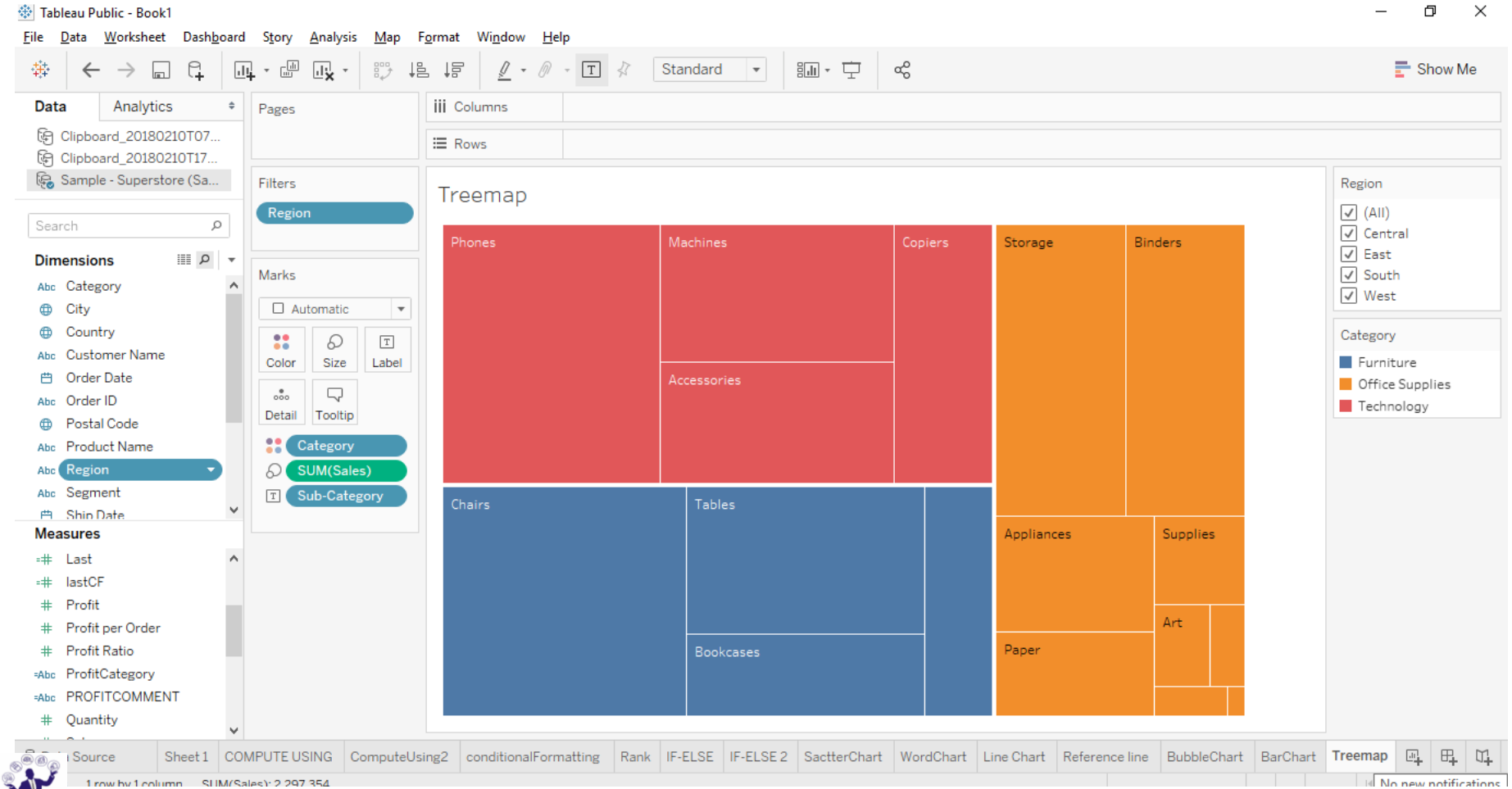
CHARTS

Bar Chart: Bar chart could be Stacked Bar Chart, Colored Bar Chart, Level Bar Chart & Interactive Bar Chart. If we put Dimensions in colors we will get stacked bar chart. If we put Measures in the colors we will get Colored Bar Chart.



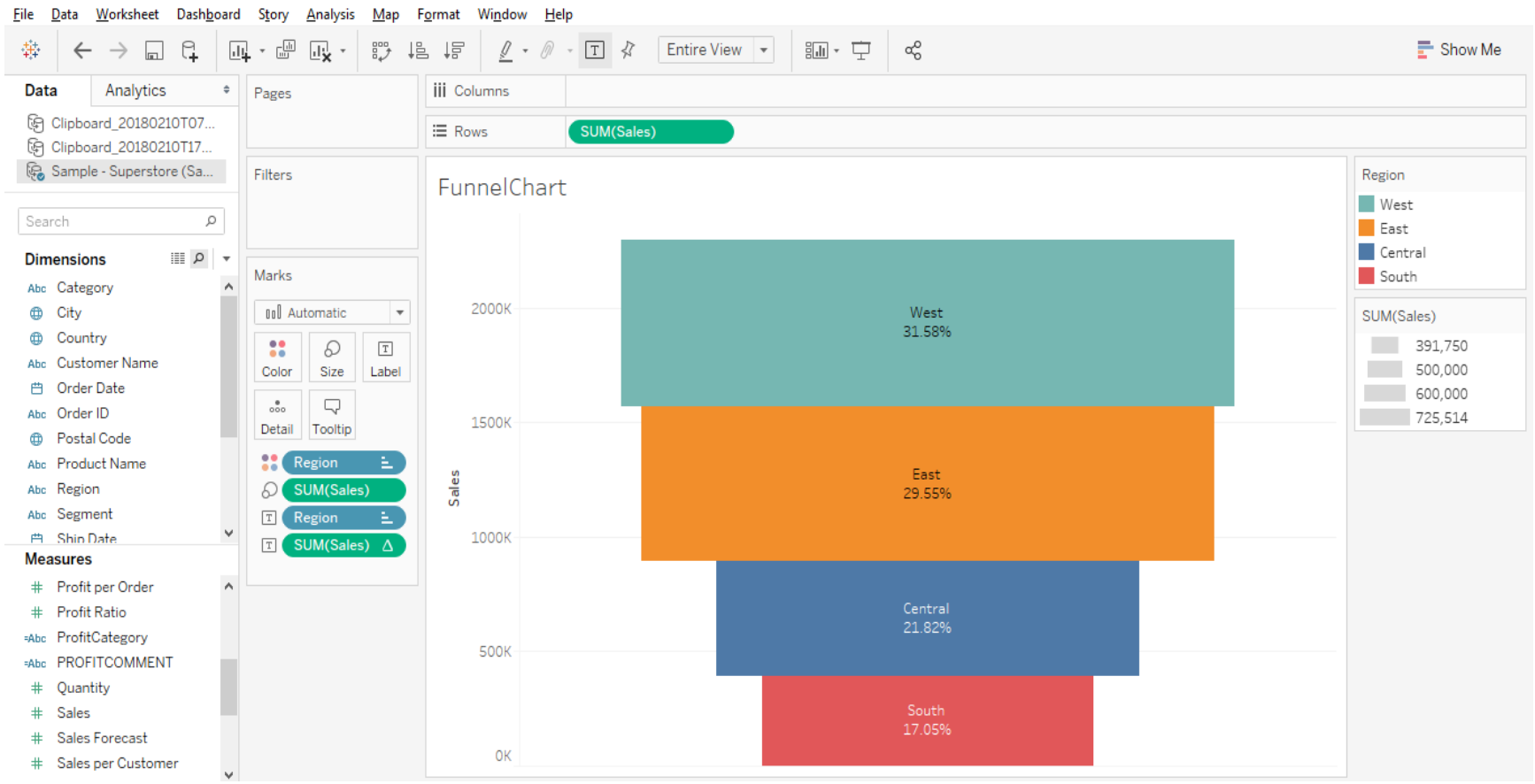
CHARTS

Tree Maps: This chart displays the data in a form of boxes / rectangles of various size.



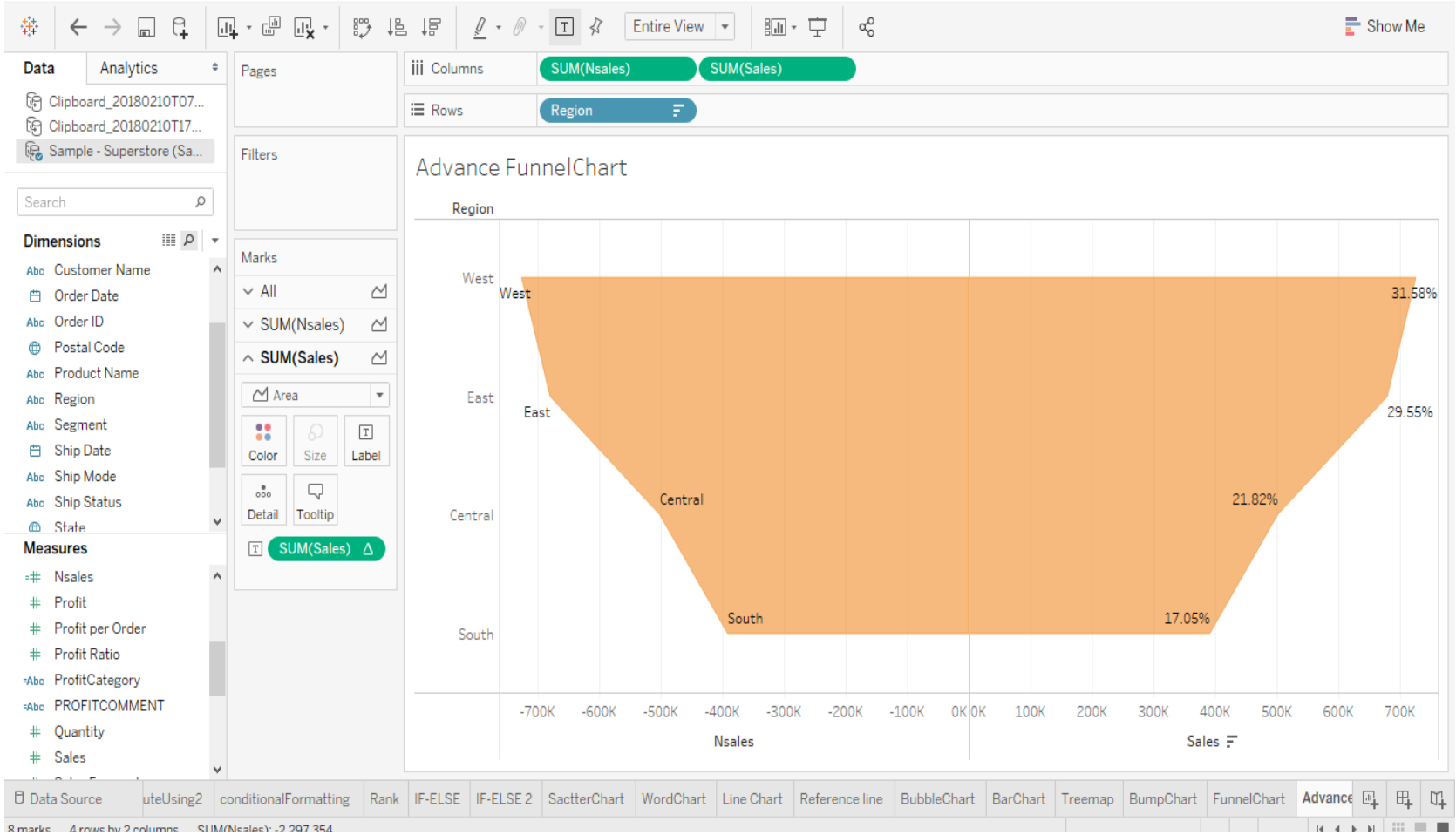
CHARTS

Funnel Chart: It is used to display a measure at different levels / sectors.



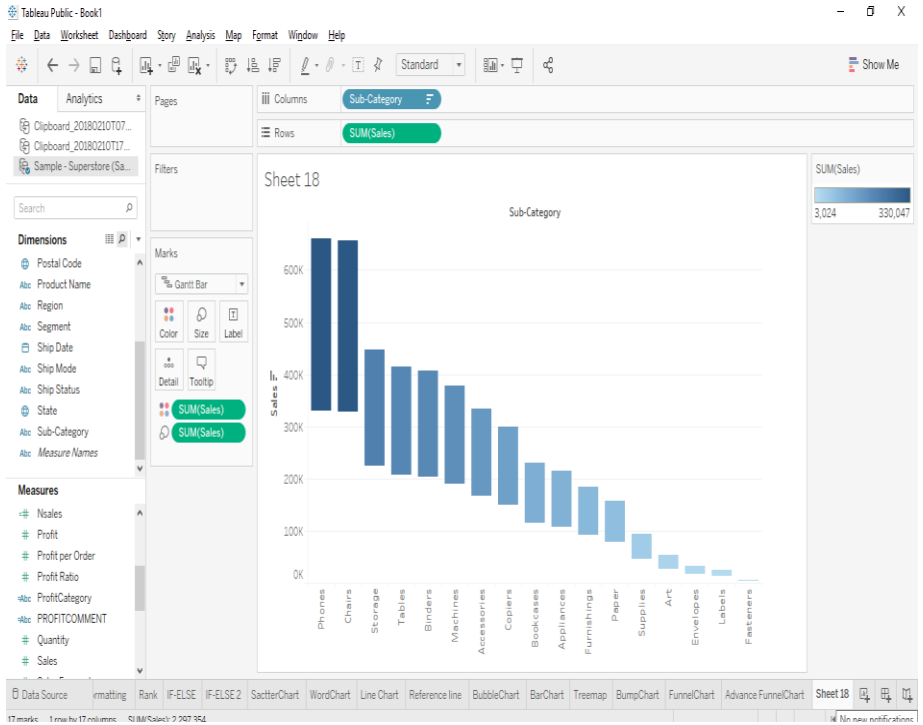
CHARTS

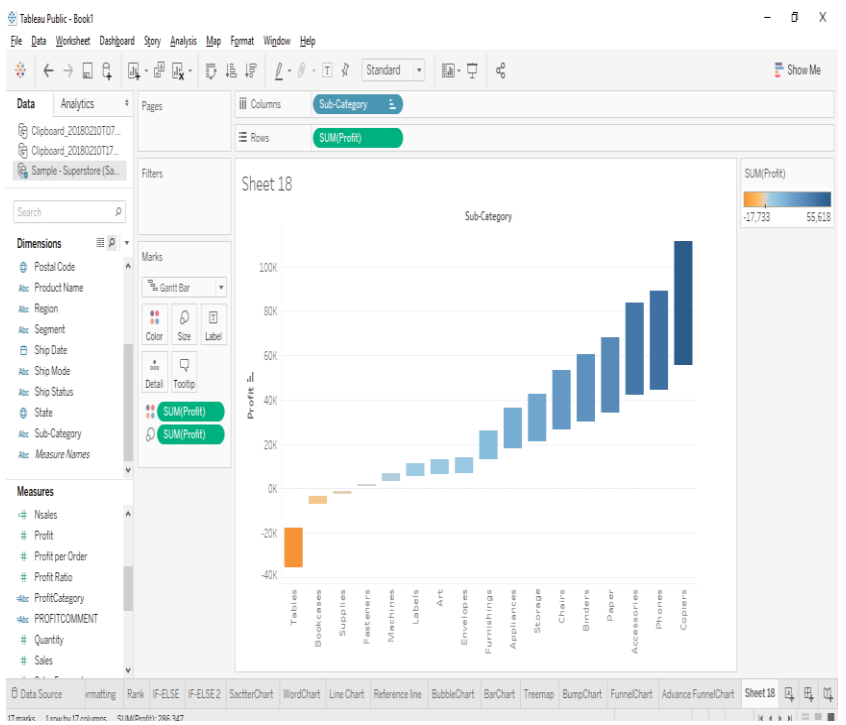
Advanced Funnel Chart: It is used to display a measure at different levels / sectors.



CHARTS - WATERFALL

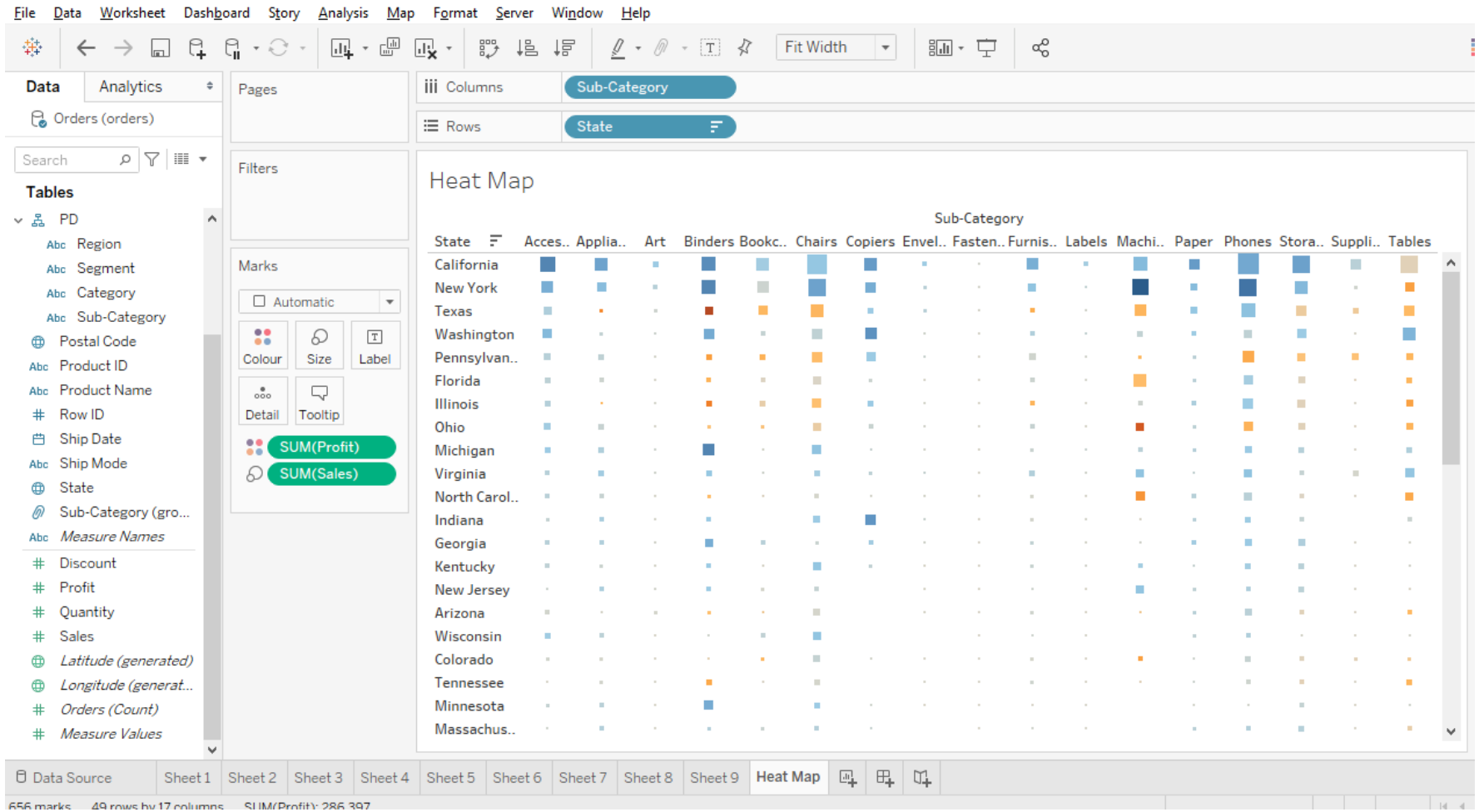
Waterfall Chart: These effectively display the cumulative effect of sequential positive and negative values, thus giving a view of water fall.
To create this chart we use Gantt Bar chart.





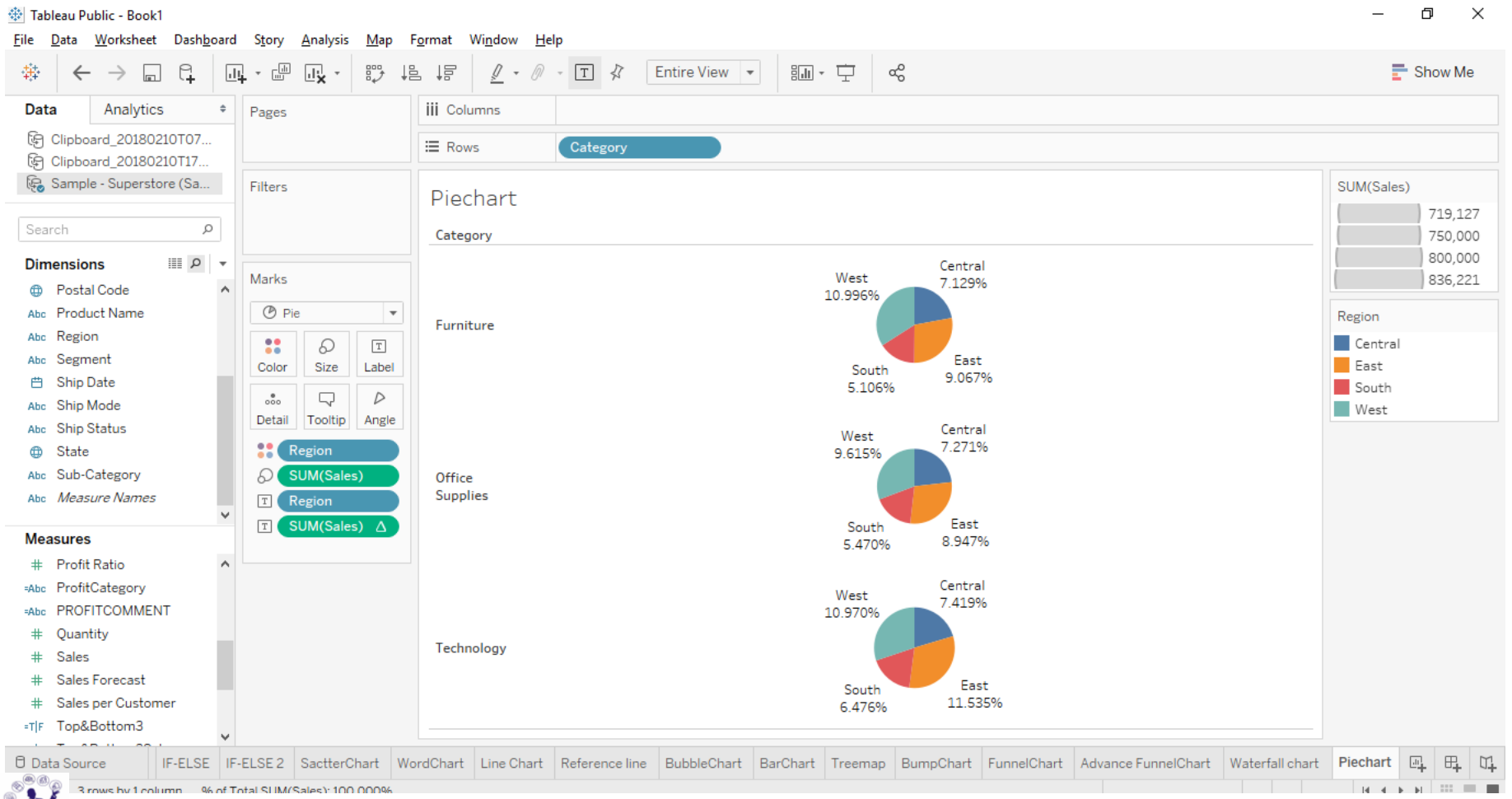
CHARTS - Heat Map

Heat Map is Used to display the data along with color. It will help to compare the data by their color.



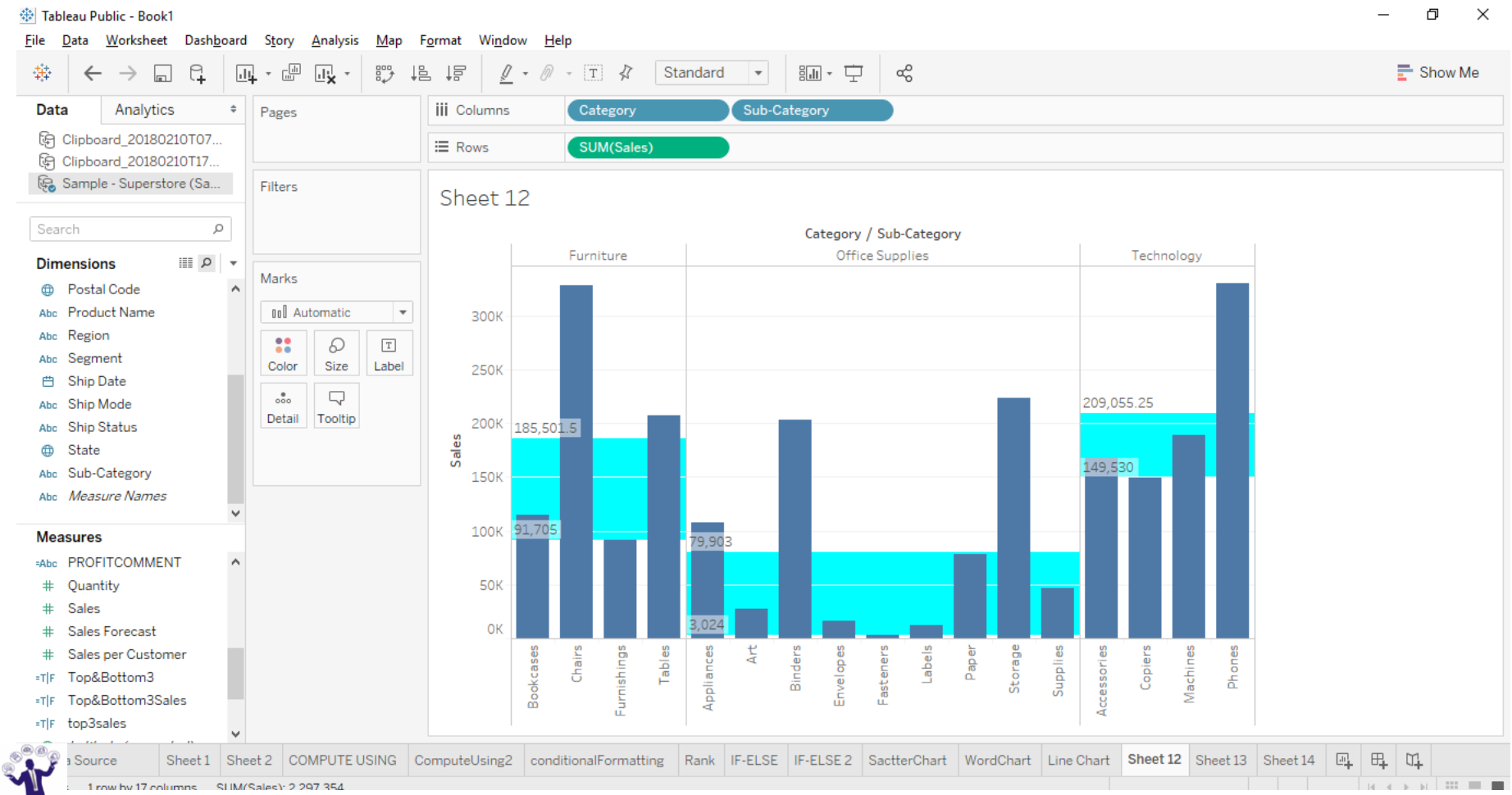
CHARTS - PIE CHART

Pie Chart: Comparatively displays the measure value.



CHARTS

Reference Lines: These are used to indentify / highlight the values with respect to a certain level. Eg: If we need to identify the below average and above average sales.
To add a reference line right click on X axis and click on add reference line.



CHARTS

Bump Chart: It is the line chart where the rank changes with time.