Project 9

Visualize Key Progress Indicators

This article shows how to create a view that shows Key Progress Indicators (KPIs). A Key Performance Indicator is a measurable value that shows how effectively a company is achieving key business objectives. At a high level, the procedure requires you to do the following:

1. Create a view that includes the field or fields (measures) you want to assess.
2. Create a calculated field that establishes the threshold that demarcates success from failure.
3. Update the view to use KPI-specific shape marks to show which values are above the threshold and which are below.

The scenario uses the **Sample - Superstore** data source provided with Tableau Desktop to show how to build a KPI view that displays a green check mark for any sales figure over $25,000, and a red X for any sales figure under $25,000.

Create a view that includes the field you want to assess

In this case, that field is **Sales**.

1. Connect to the **Sample - Superstore** data source.
2. From the Data pane, drag **Sub-Category** to **Rows** and **Region** to **Columns**.
3. From the Data pane, drag **Sales** to **Text** on the Marks card.

Create a calculated field that establishes the threshold that demarcates success from failure

1. In the **Analysis** menu, select **Create Calculated Field** to open the calculation editor. Name the calculation KPI and type or paste the following in the formula area
   ```
   IF SUM ([Sales]) > 25000 THEN "Above Benchmark" ELSE "Below
   Benchmark" END
   ```
2. Click **OK**.

## Update the view to use KPI-specific shape marks

1. On the Marks card, select Shape from the drop-down list of views:
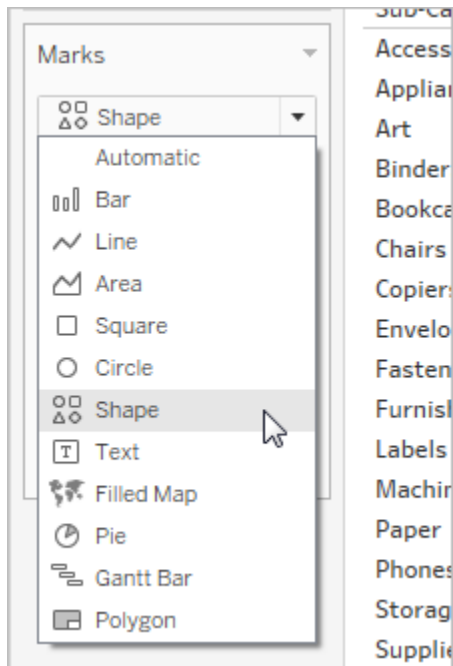
2. Drag the **KPI** field from the **Measures** area of the **Data** pane to **Shape** on the Marks card.
3. Click **Shape** on the Marks card to open the **Edit Shape** dialog box.

4. From the **Select Shape Palette** drop down list, choose **KPI**.
   Now you are ready to associate specific values for the KPI field with specific shapes.
5. Click **Above Benchmark** under **Select Data Item** and then click the green check mark in the palette.

6. Click **Below Benchmark** under **Select Data Item** and then click the red X in the palette.
The Edit Shape dialog box should now look like this:
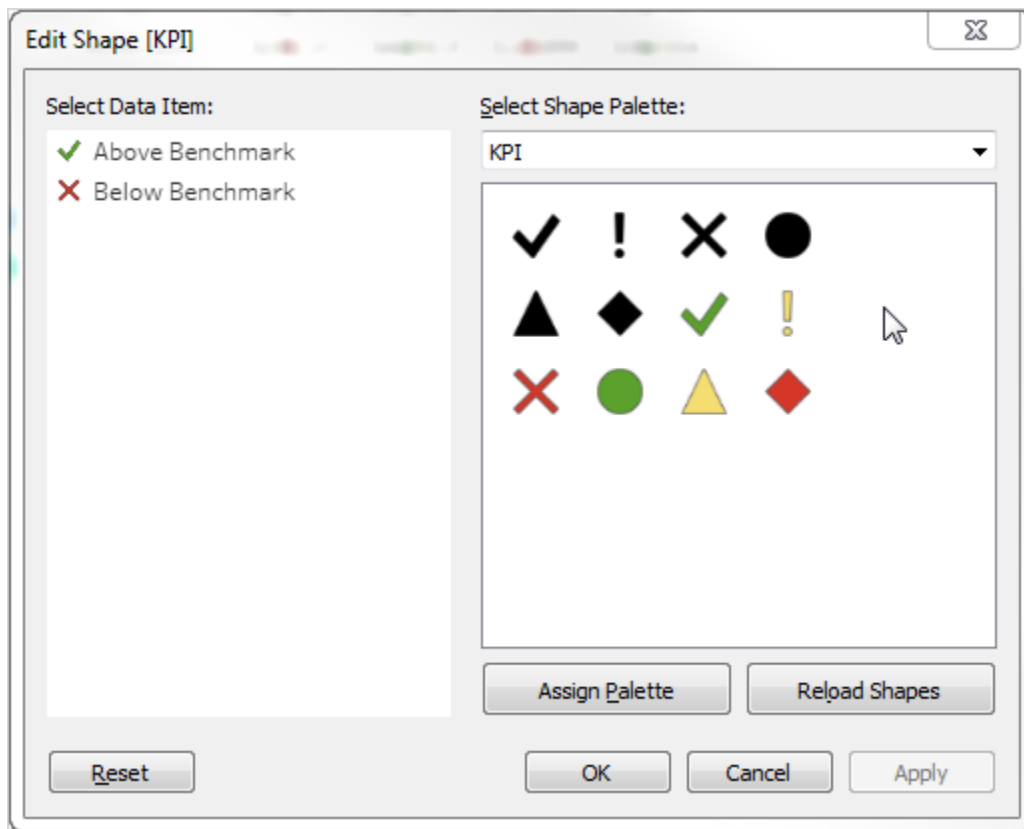
7. Click **OK** to close the Edit Shape dialog box.
The shapes in the view show the correct indicators. Now you just need to hide the sales numbers.
8. Drag **SUM(Sales)** on the Marks card to **Detail**.
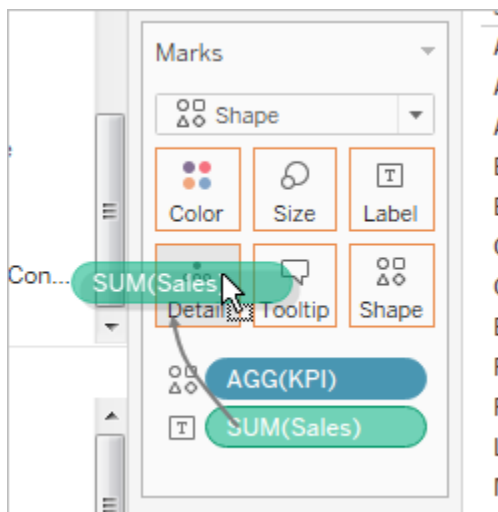
You now have a completed view that show how individual products (sub-categories) are performing across all four regions:

Pages		
Columns	Region	
Rows	⊞ Sub-Category	

Sheet 8

Region

Sub-Catego..	Central	East	South	West
Accessories	✓	✓	✓	✓
Appliances	✗	✓	✗	✓
Art	✗	✗	✗	✗
Binders	✓	✓	✓	✓
Bookcases	✗	✓	✗	✓
Chairs	✓	✓	✓	✓
Copiers	✓	✓	✗	✓
Envelopes	✗	✗	✗	✗
Fasteners	✗	✗	✗	✗
Furnishings	✗	✓	✗	✓
Labels	✗	✗	✗	✗
Machines	✓	✓	✓	✓
Paper	✗	✗	✗	✓
Phones	✓	✓	✓	✓
Storage	✓	✓	✓	✓
Supplies	✗	✗	✗	✗
Tables	✓	✓	✓	✓

Marks

Shape

Color | Size | Label

Detail | Tooltip | Shape

AGG(KPI)

SUM(Sales)

The view may not be terribly exciting on its own, but it would make a nice addition to a dashboard that showed other performance metrics.