



Creating and Using Ad hoc / Edit in Shelf Calculations

Ad hoc / Edit in Shelf calculations are the quickest and easiest way to create a new calculated field in Tableau. Ad hoc calculations can be created in the Rows, Columns, and Measure Values shelves, as well as in the Marks cards.

Simply double-click on the existing field in your shelf of choice, or, alternatively you can use the Edit in Shelf option in the drop-down list of that field, as shown in the following figure:

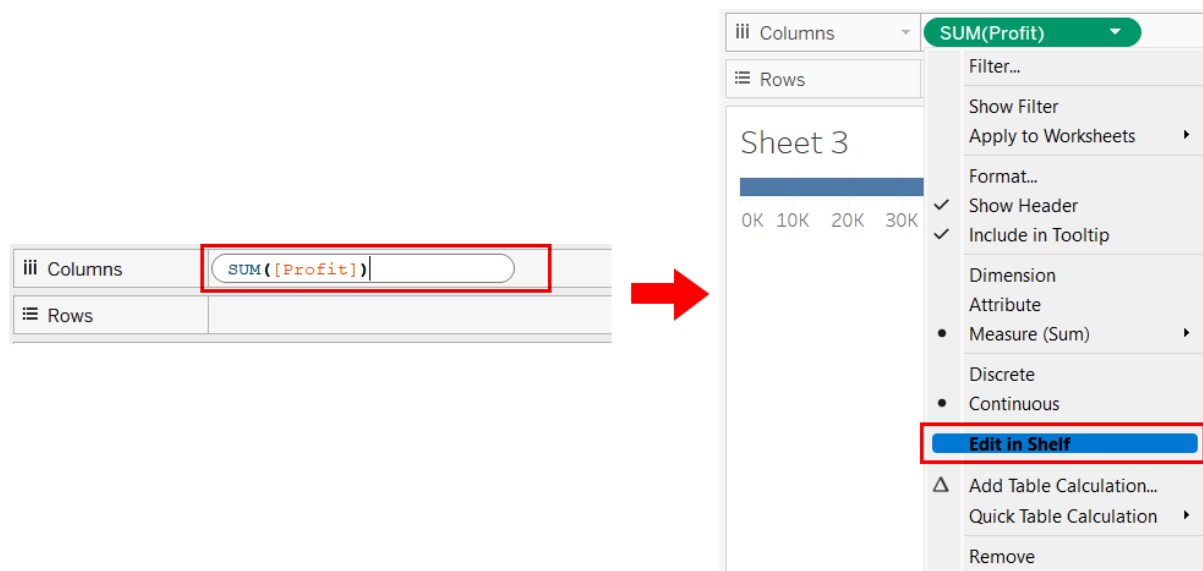


Figure 1: A screenshot showing how to create an ad hoc calculation

These ad hoc calculations are useful when creating quick, on-the-fly calculations that you may or may not want to save and reuse. You will explore this in the exercise below.



Exercise 01: Creating an Ad Hoc Calculation to Highlight Loss-Making Sub-Categories

The aim of this exercise is to find out which sub-categories have negative profit and which ones have positive profit. Those with negative profit will be your loss-making sub-categories and will be color-coded orange. You will use the **Orders** data from **Sample-Superstore.xlsx** for this exercise.

Perform the following steps:

1. Start by creating a bar chart showing **SUM(Sales)** by **Sub-Category** with **SUM(Profit)** in the **Color** shelf, as shown in the following screenshot.

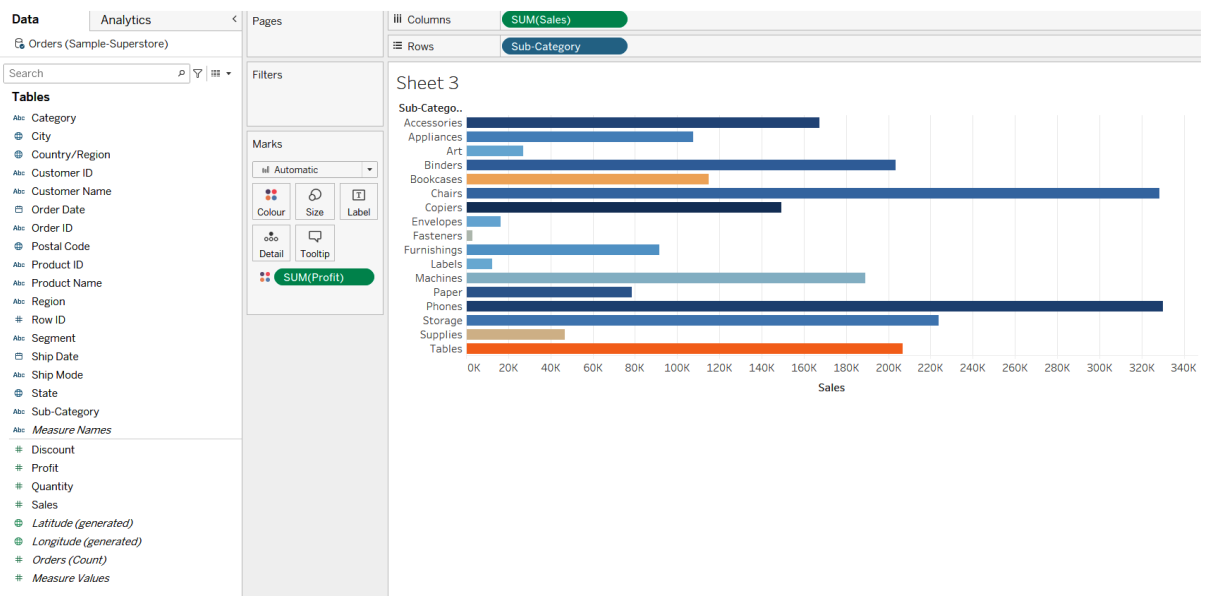


Figure 2: A screenshot showing a bar chart of Sales by Sub-Category with profit in color

The bars have a color palette of orange and blue, with shades of *orange indicating negative profit*, and shades of *blue indicating positive profit*. The shades indicate the intensity of **Profit**. However, the task at hand is to highlight the bars that are loss-making, which means those with a profit less than zero. The intensity of profit is irrelevant for this task.

To address this, either double-click or use the **Edit in Shelf** option in the dropdown of the **SUM(Profit)** field in the **Color** shelf and type the following formula:

SUM(Profit) < 0

2. Hit *Enter* to see the new ad hoc calculation. It now shows two colors instead of the previously seen diverging colors. In this case, the orange bars indicate subcategories are loss-making and the blue bars indicate subcategories are profitable. Refer to the following screenshots:

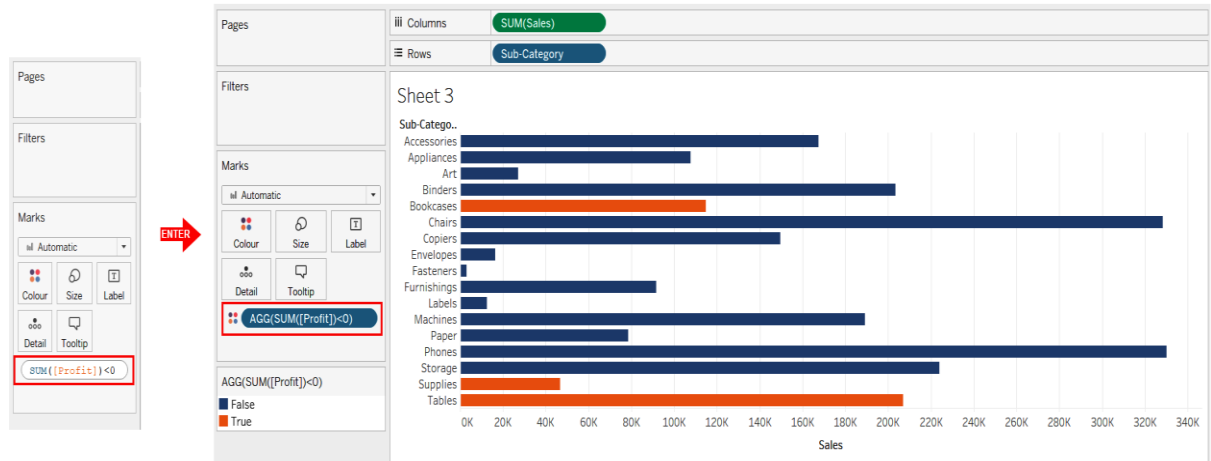


Figure 3: Screenshots with an ad hoc calculation in the color shelf

Further, as mentioned previously, this ad hoc calculation is an on-the-fly calculation that may be used only in this specific visualization, in which case, there isn't any need to save this calculation.

3. So that you can reuse this in other visualizations, save the calculation in the **Data** pane by simply dragging and dropping, as shown in the following screenshots:

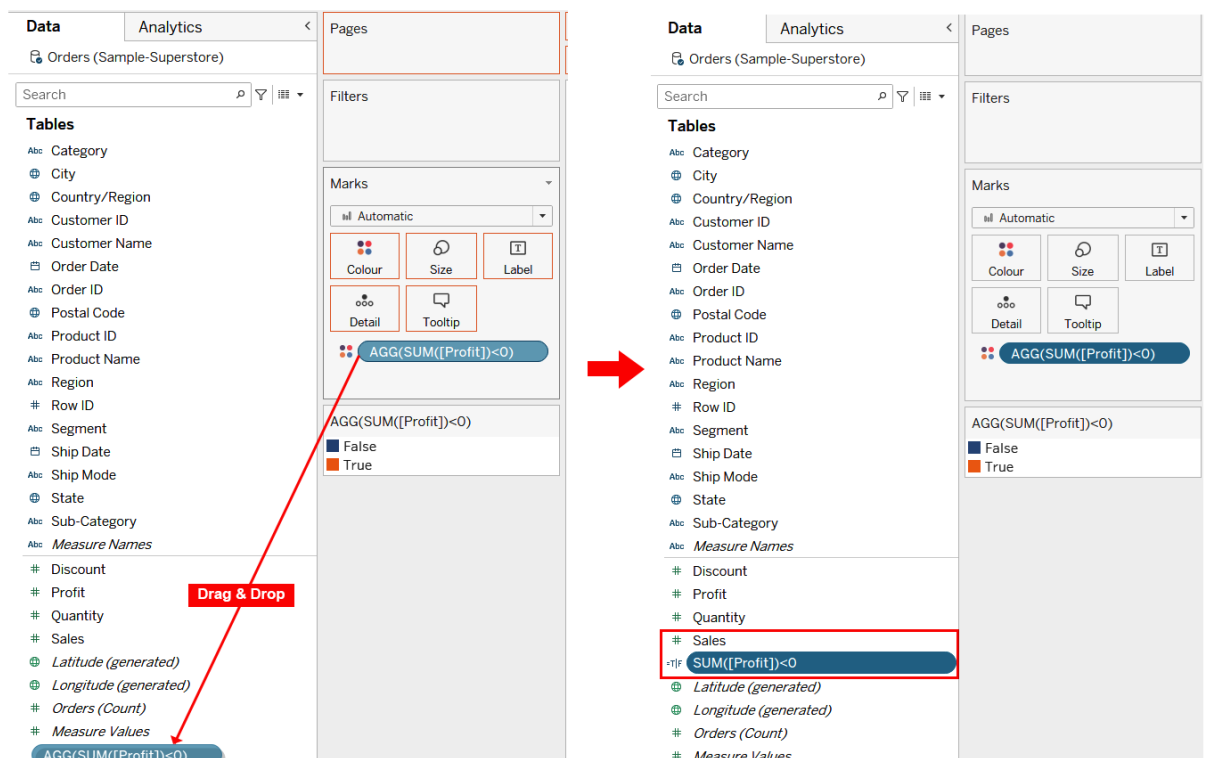


Figure 4: Screenshots showing how to save an ad hoc calculation