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Leveraging Multiple Marks Cards in Tableau

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In Tableau Desktop, many people want the ability to synchronize multiple marks and have the ability to automatically adjust the dashboard. Unfortunately, more often than not, the adjustment to the dashboard size causes issues with the formatting and alignment of multiple worksheets. The ability to place multiple marks in not only the same dashboard but the same worksheet allows for a far more adjustable size. Having multiple marks for

separate measures also allows for Tableau's built-in highlight feature on the rows selected; you can select the category and it will highlight all marks relating to the selected category.

Directions:

- Connect to Sample – Superstore – English (Extract) from your saved data sources, all licenses of Tableau Desktop come with this sample data.
- Create 3 calculated fields:

Calculated Field [Spacer]

Name: Spacer

Formula:

```
1
```

✓ The calculation is valid. Clear

Calculated Field [Profit Ratio]

Name: Profit Ratio

Formula:

```
SUM(Profit)/SUM(Sales)
```

✓ The calculation is valid. Clear

Calculated Field [Profit Ratio KPI]

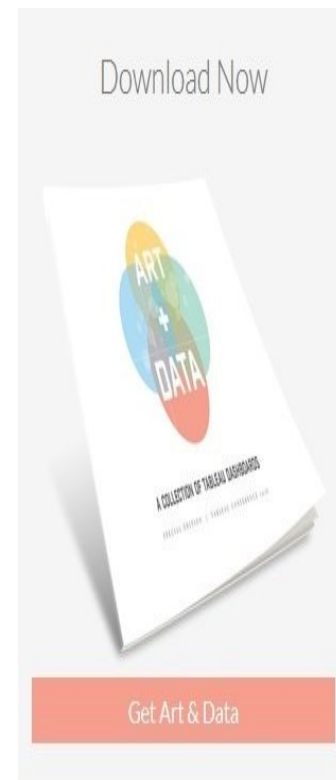
Name: Profit Ratio KPI

Formula:

```
IF [Profit Ratio] > .3 THEN 'Good'
ELSEIF [Profit Ratio] > .2 THEN 'Okay'
ELSE 'Bad'
END
```

✓ The calculation is valid. Clear

- Right click on *Spacer* and set the default number format to minimum
 - Default Properties > Aggregation > Minimum
- Start building the view by bringing out the following:



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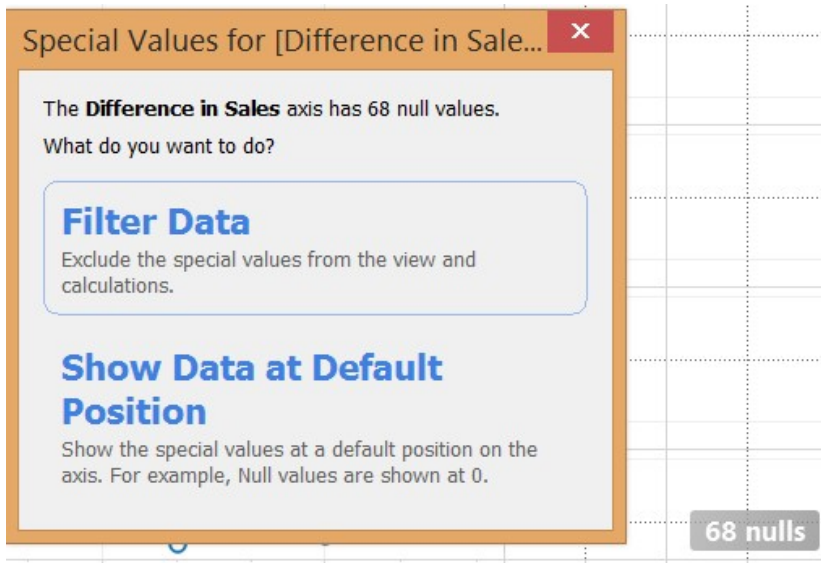
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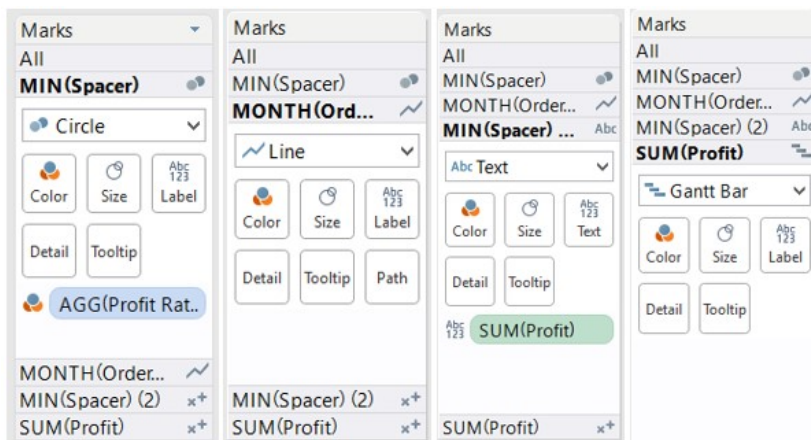
Columns	MIN(Spacer)	MONTH(Order ..	MIN(Spacer)	SUM(Sales)
Rows	Category	SUM(Sales)		

- Right click on the instance of **SUM(Sales)** and run the “Difference” Quick table calculation
 - Quick Table Calculation > Difference
- Show Data in Default Position



Adjusting the Marks

- Set the marks cards as following:



Formatting

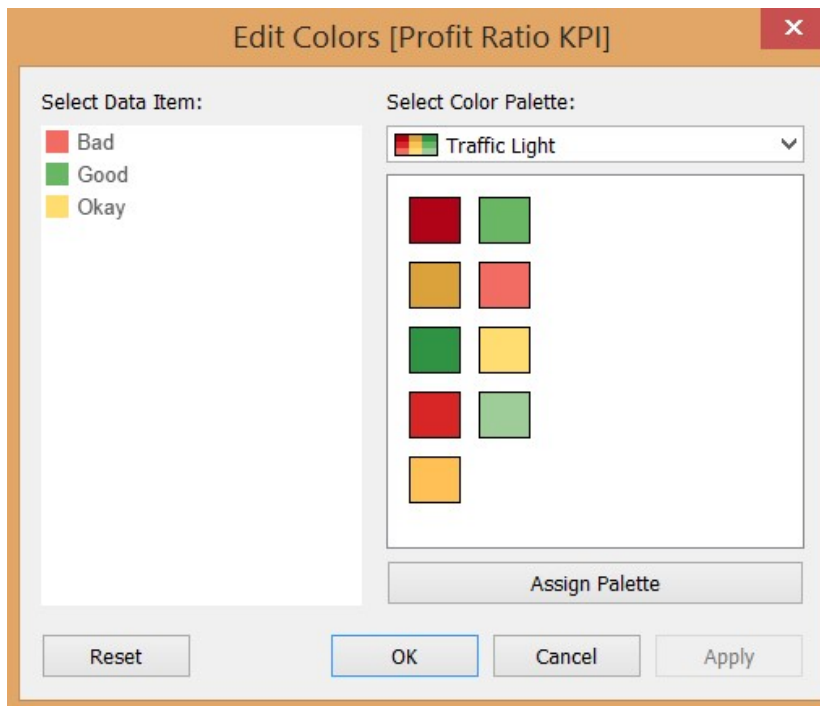
- Change the color of the Profit Ratio KPI Legend to Red, Yellow, Green.

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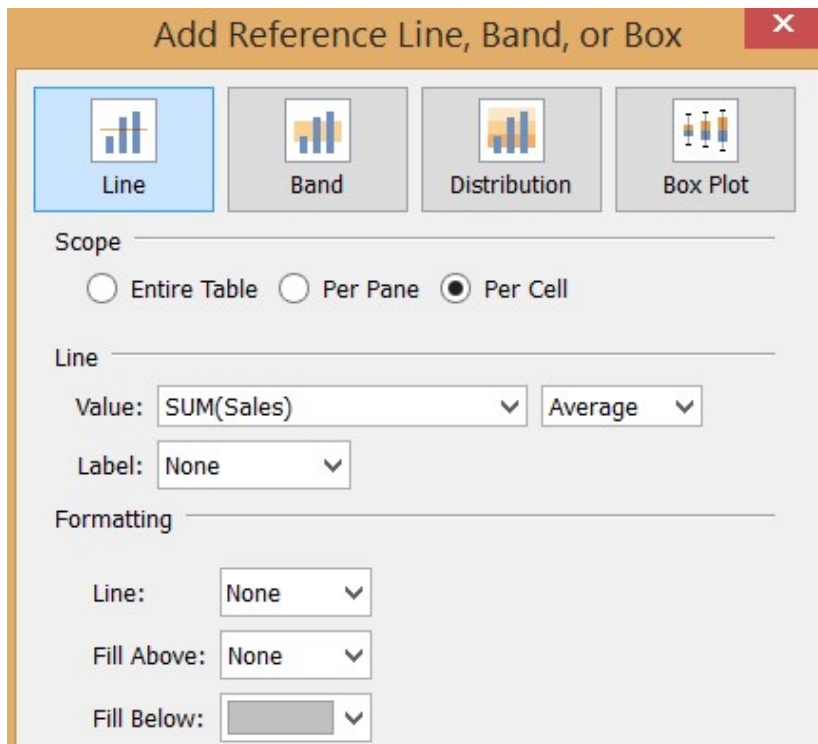
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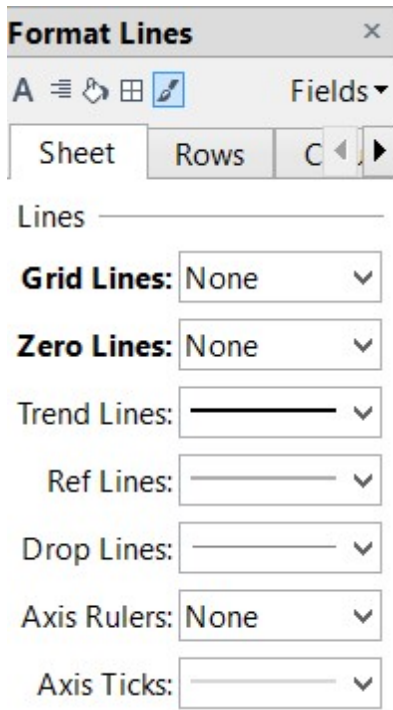
- Adjust the cell size by using shortcut Ctrl+Shift+B or using the Format drop down menu.
 - Format > Cell Size > Bigger
- Right click on the SUM(Sales) Difference Axis and uncheck "Show Header."
- Right click on the SUM(Sales) Axis under the Gantt Bar on the right and add a reference line with the following settings:

- Tableau (21)
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- Alteryx (8)
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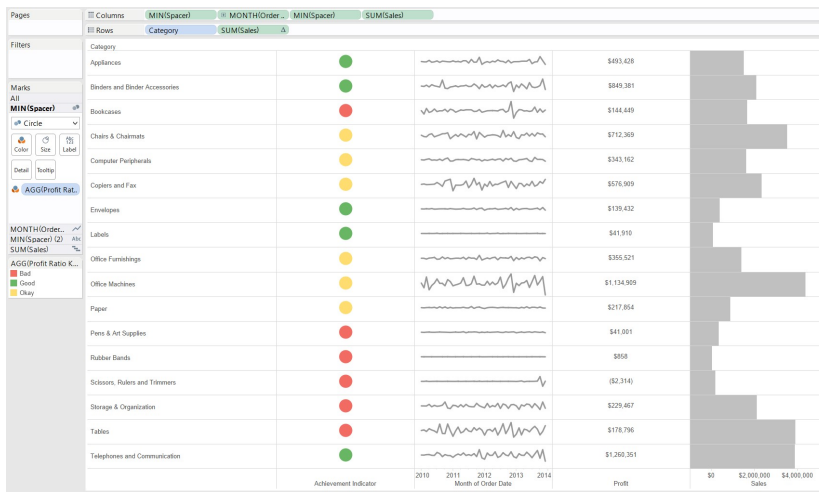


- Set the Gantt Bar Color to 0% Transparent
- Right click in the view and set the Grid Lines and Zero Lines to "None"



- Finish Up by changing the axis on the bottom of the stoplights to say "Achievement Indicator" instead of "Spacer" and set tick marks to none

- Change the name of the Profit Column to “Profit” and remove tick marks.



The Purpose

The reason that this trick is particularly useful in Tableau is that it unlocks far more potential for what would normally be a dashboard view to dynamically change with different screen sizes. This view also allows you to select one row, or category in this instance, and have it highlight across the category name, stoplight, sparkline, profit text, and sales bar.

Thank you for reading and happy analyzing!

Josh Bricel

Posted by Brian Pohl

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Mithun Nagabhairava 5/2/2017, 7:01:36 AM

Hi Josh, thanks for the article.

I tried to recreate your example, and I couldn't tell what is the second field (Month(Order...?)) in "Start building the view by bringing out the following:". Looking forward to your reply.

Reply to *Mithun Nagabhairava*

Alyssa (Decisive Data) 5/5/2017, 5:06:26 AM

Hi Mithun. The second field is Order Date. You can right click on it in the dimensions pane on the left and drag it to the columns shelf. Then the option to view by continuous month is the 4th from the bottom. Hope this helps! --Alyssa

Reply to *Alyssa (Decisive Data)*

mac Domain 8/15/2017, 8:26:39 PM

This is an amazing solution, so thank you for that. Is there a way to make any of these charts a bullet graph instead of

lines? Thanks again

Reply to *mac Domain*

Jacob Olsufka (Decisive Data) 8/18/2017, 3:29:21 AM

Hi Mac. Sure - a bullet chart in this example is possible by leveraging both a reference band and reference line within the same axis. Make sure you include whatever field you want to use for the reference line of your bullet on Detail of the appropriate Spacer Marks Card.

If you are looking to create a bullet chart without a line chart or KPI indicator next to it, check out this tutorial.
<http://www.decisivedata.net/blog/building-bullet-chart-tableau>

It may be a simpler solution for what you are trying to create.

Reply to *Jacob Olsufka (Decisive Data)*

Nina H 3/20/2018, 3:11:43 AM

This is extremely useful thanks. Do you know if you can move the column headers to the top?

Reply to *Nina H*

[Justin Giger \(Decisive Data\)](#)

3/20/2018, 10:45:15 PM

Hi Nina. Yes, you can move the column headers to the top.

Steps to do this:

1. Duplicate all of the continuous (green pills) and

create a dual axis chart for each. Make sure to right click and synchronize the axis! Your column shelf should now read: Min(Spacer), Min(Spacer), Month(Order Date), Month(Order Date), Min(Spacer), Min(Spacer, Sum(Sales), Sum(Sales), and you should have axes on both the top and bottom.

2. Hide the bottom axis: right click on it and select "Edit Axis". On the "General" tab, delete the title and on the "Tick Marks" tab, set Major and Minor tick marks to "None".

Hope this helps!
-Justin

Reply to *Justin Giger (Decisive Data)*

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