ASSIGNMENT-2

Donut Chart
Steps to Implement:

1. Open a new Worksheet and drag Product Line to Color.
2. Drag Total (measure) to Angle and Label, and change Marks type to Pie.
3. Create a calculated field called Zero = 0 and drag it twice to Rows to create a dual axis.
4. Make the second pie smaller (white color) to form a donut shape.

Purpose:

A donut chart shows percentage contribution of each category to total sales.
It helps compare how much each product line contributes.
Easy to identify highest and lowest performing categories.
Useful for clear percentage-based business analysis.

Donut chart
Step by step process:

Step 1: Create Pie Chart

● Open a New Worksheet.
● Drag Product Line   Color (Marks card).
● Drag Total (Measure)   Angle and Label.
● Change Marks type to Pie.

Step 2: Create a Calculated Field 5. Right-click in Data pane   Create Calculated Field.
6. Name it Zero and type: 0   Click OK.

Step 3: Create Dual Axis 7. Drag Zero to Rows twice.
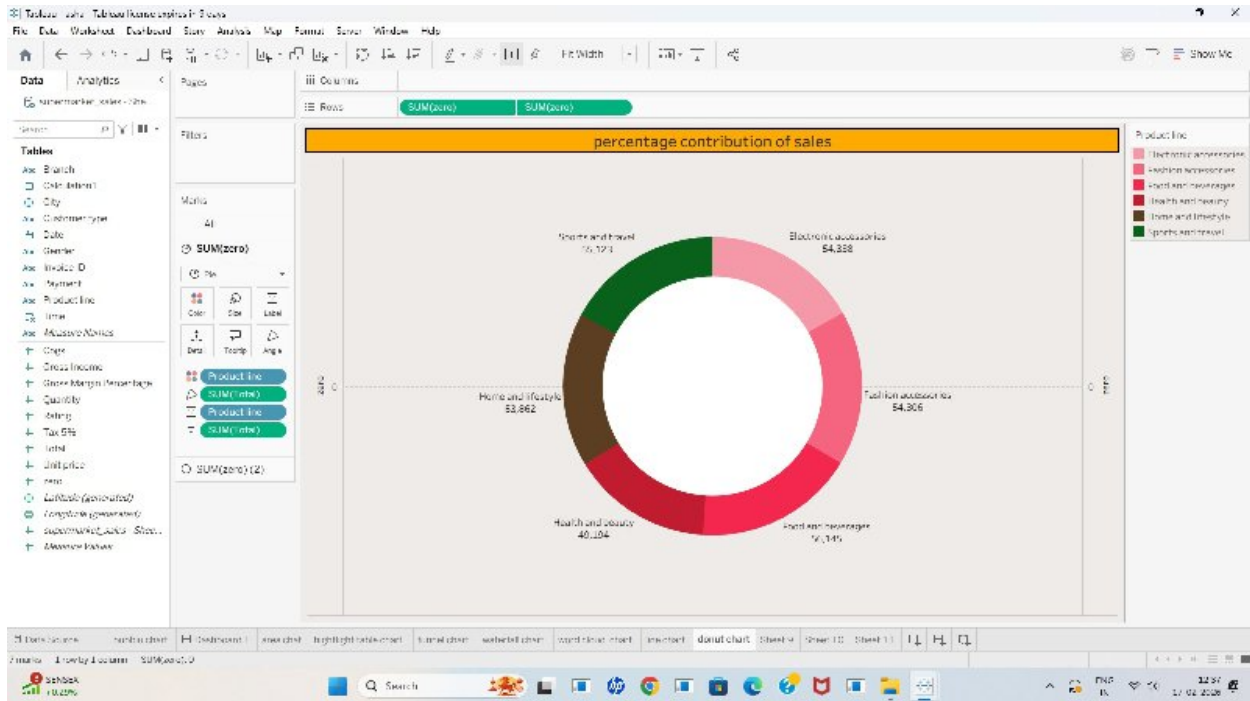8. Right-click second axis   Dual Axis.
9. Right-click axis   Synchronize Axis (if needed).

Step 4: Make Donut Shape 10. Select second Marks (SUM(Zero)).
11. Change color to White.
12. Reduce Size to make inner circle (hole).
13. Hide headers.

Area Chart
Steps to Implement:

1. Open a New Worksheet and connect to your dataset.
2. Drag Date to Columns and change it to Month.
3. Drag Total (Measure) to Rows.
4. Change Marks type to Area and drag Branch to Color (for stacked area).

Purpose :

An area chart shows sales trends over time.
It highlights growth or decline month by month.
Stacked area helps compare contribution of each branch.
Useful for analyzing revenue growth patterns.

Area Chart
Step by step process:

Step 1: Open Worksheet

- Open Tableau   Click New Worksheet.

Step 2: Add Date
- Drag Date field   Columns.
- Click on Date pill   Select Month (Discrete or Continuous as needed).

Step 3: Add Measure
- Drag Total (Sales)   Rows.

Step 4: Change Chart Type
- Go to Marks Card   Change type from Automatic to Area

Step 5: Add Category (Optional – for Stacked Area)
- Drag Branch (or Category)   Color.

Step 6: Final Touch
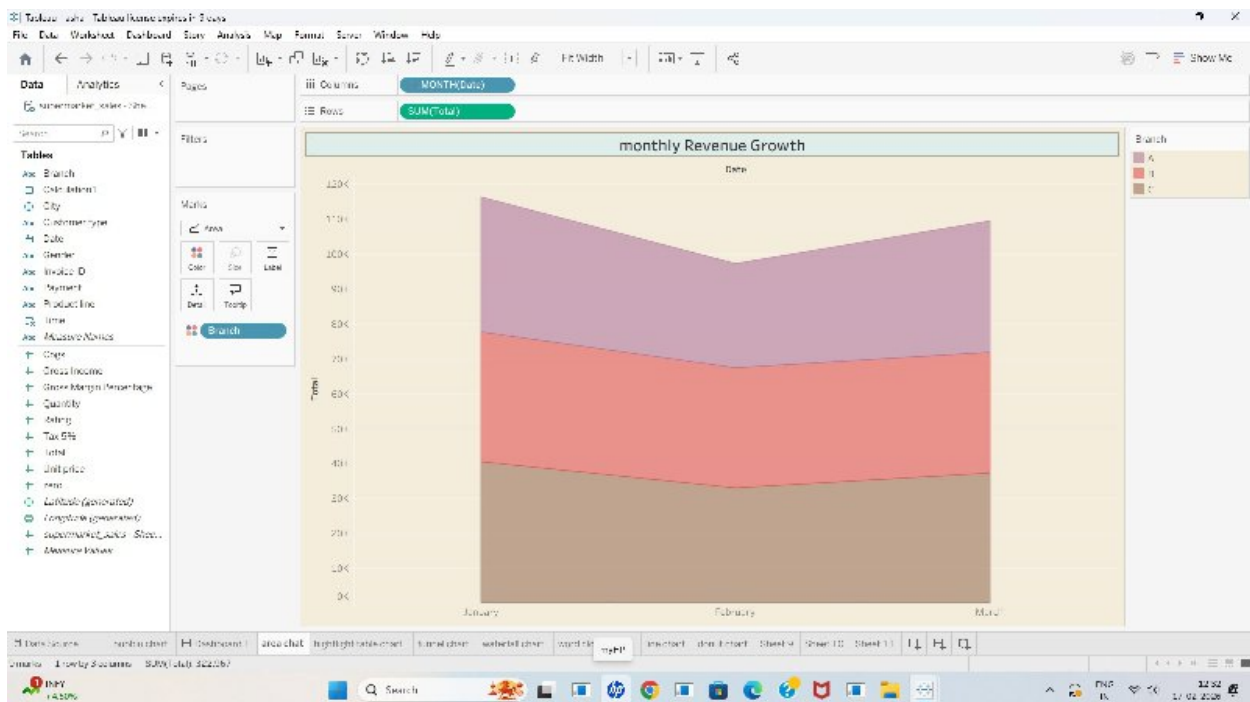- Adjust size, colors, and title if needed.

Tableau (Text chart
Steps to Implement:

1. Drag Branch to Columns and Total (SUM) to Rows.
2. Drag Product line to the Color mark to create stacked bars.
3. Adjust formatting (Title, shading, labels) from the Format pane.
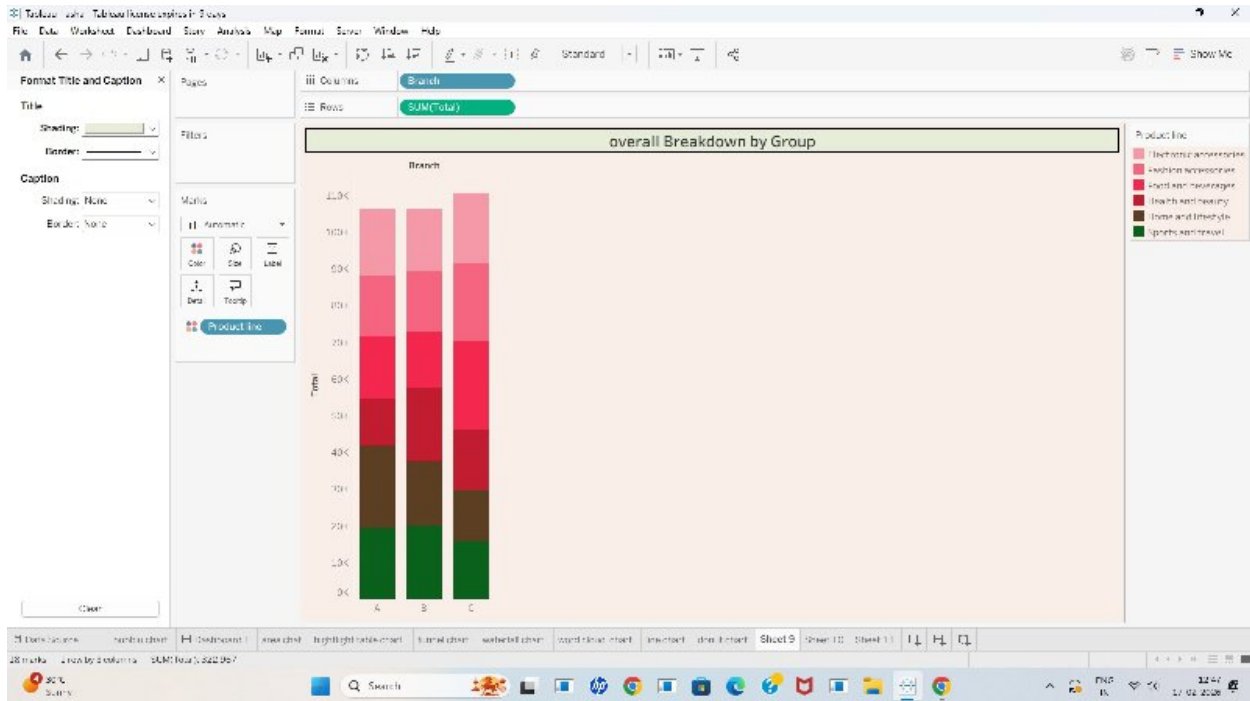4. Add filters if needed to refine the view.

Purpose:

To visualize the overall sales breakdown by product line across different branches, helping compare performance and contribution of each category.

Text chart
 step by step process:

1. Connect to Data

- Open Tableau   Connect to your data source (Excel, CSV, Database).

2. Create a New Worksheet

- Click on a new sheet to start building the chart.

3.Add Dimensions

- Drag one dimension (e.g., Branch) to Rows.
- Drag another dimension (e.g., Product Line) to Columns.

4 .Add Measure as Text

- Drag the measure (e.g., Total Sales) to the Text mark on the Marks card.
- This creates a Text Table (Crosstab).

5.(Optional) Convert to Highlight Table

- Click Show Me   Select Highlight Table,
- or drag the same measure to Color to add color shading.

Highlight Table
Step to process:

1. Drag City to Rows and Product Line to Columns.
2. Change Marks type to Square (or select Highlight Table from Show Me).
3. Drag SUM(Total) to Color and also to Label.
4. Format colors and adjust the view to Entire View.
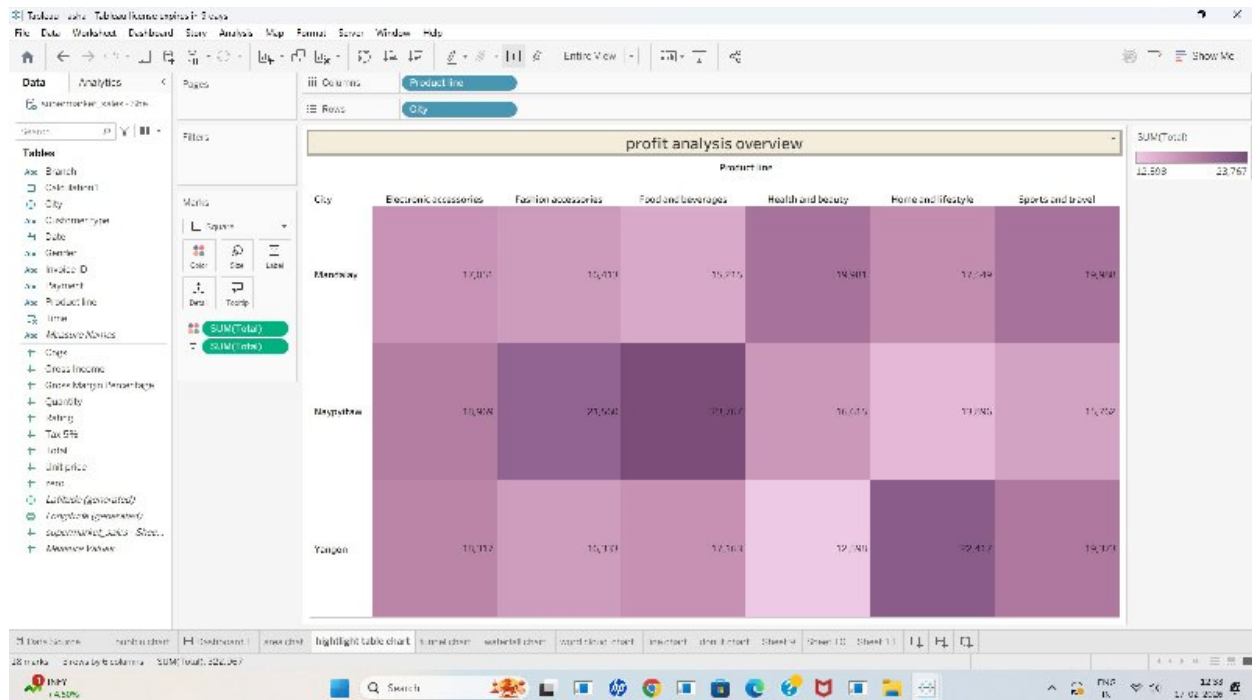
Purpose:

To compare total profit/sales across cities and product lines, using color intensity to quickly identify high and low performance

Highlight Table
Step by step process:

1. Open Tableau & Connect Data

- Open Tableau   Click Connect   Select your dataset (e.g., Supermarket Sales).

2. Open a New Worksheets

3. Add Dimensions

   - Drag City to the Rows shelf.
   - Drag Product line to the Columns shelf.

   4.Add Measure

   - Drag Total to the Text (Label) on the Marks card.
   -
5. Convert to Highlight Table

   - Click Show Me   Select Highlight Tables
     (OR) change Marks type to Square manually.

6. Add Color Encoding

   - Drag Total again to Color in the Marks card.

7. Format the View

   - Click Color   Edit Colors to adjust color scale.
   - Set view to Entire View for proper fitting.
   - Add title and format numbers if needed.

Word Cloud Chart
Steps to Implement:

1. Open Tableau and load the dataset (e.g., Supermarket Sales).
2. Drag Product line to the Text option in the Marks card.
3. Drag Quantity (SUM) to Size so the text size changes based on quantity.
4. Drag Product line to Color to assign different colors for each category.

Purpose:

A Word Cloud chart is used to display text data visually. The size of each word represents its importance or frequency in the dataset. In this example, product lines with higher sales quantity appear larger. It helps quickly identify the most popular product categories.

Word cloud charts
Step by step process:

1 .Open Tableau and connect to the Supermarket Sales dataset word Cloud Chart
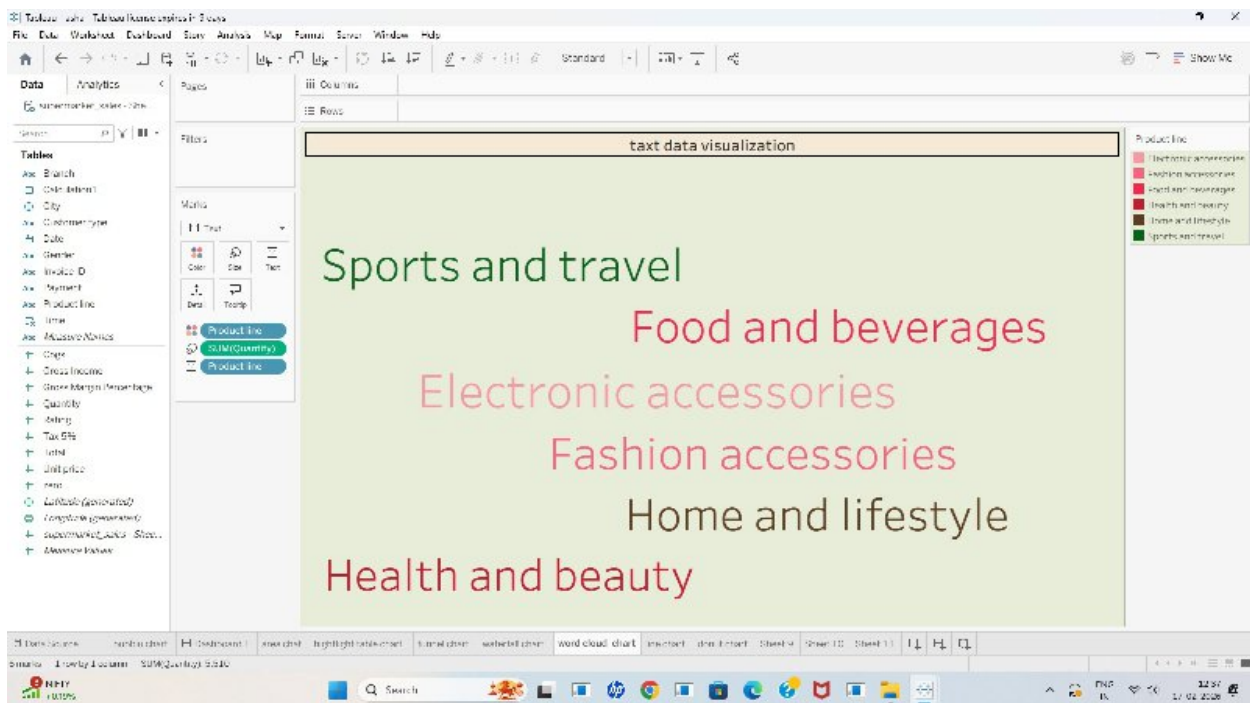
- Click New Worksheet to start creating the visualization.
- Drag Product line (dimension) to the Text option in the Marks card.

2 .Change the Marks type to Text

- Drag Quantity to Size in the Marks card so the word size changes based on sales quantity.
- Drag Product line again to Color to display different colors for each category.
- Adjust the size slider to make the words larger and format the background if needed.

Purpose:

This Word Cloud visualization shows product categories where larger words represent higher sales quantity. It helps easily identify the most popular product lines in the dataset.

(Horizontal Bar Chart

Steps to Implement:

1. Drag Payment to the Rows shelf.

2. Drag Total (SUM) to the Columns shelf

3. Ensure Marks type is set to Bar (Automatic).

4. Format labels, title, and adjust to Entire View.

Purpose:

To compare total sales across different payment methods (Cash, Credit Card, E-wallet) and identify which payment type generates the highest revenue.
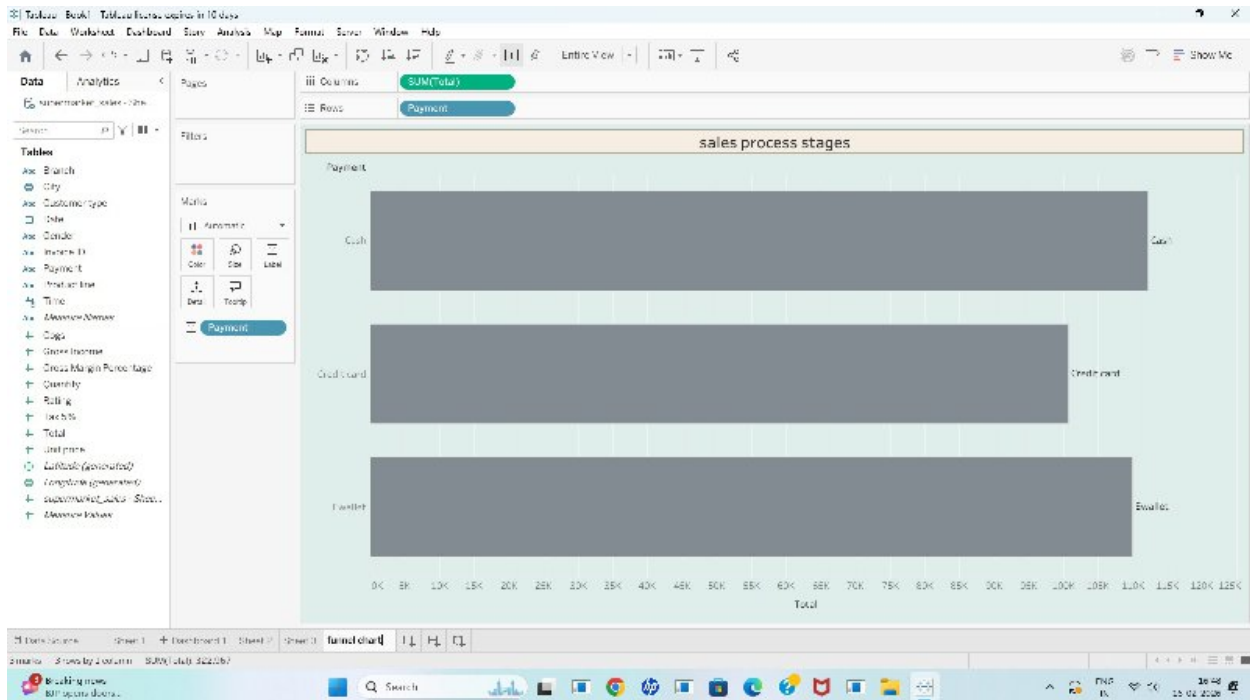
Horizontal Bar Chart
Step-by-Step Process:

1. Open Tableau & Connect Data

- Connect to your dataset (Excel, CSV, Database, etc.).

2 .Create a New Worksheet

3 .Add Dimension (Category)

- Drag the categorical field (e.g., Payment, Branch, Product Line) to the Rows shelf.

4 .Add Measure (Value)

- Drag the measure (e.g., Total Sales) to the Columns shelf.

5. Set Chart Type

- Ensure the Marks type is set to Bar (usually automatic).
- This creates a horizontal bar chart.

6 .Sort the Bars (Optional)

- Click the Sort icon to arrange bars in ascending or descending order.

7.Add Labels

- Drag the measure to Label on the Marks card to show values.

8.Format the Chart

- Edit title, adjust colors, and set the view to Entire View for better display.

Waterfall Chart
Steps to Implement:

1. Open Tableau and load the dataset (e.g., Supermarket Sales).
2. Drag Product line to the Columns shelf.
3. Drag Total to the Rows shelf and apply Running Total from Quick Table Calculation.
4. Change the Marks type to Gantt Bar and drag Total to Size to create the waterfall bars.

Purposes:

A Waterfall chart shows the cumulative effect of sequential values. It helps understand how different categories contribute to the overall total. In this example, each product line adds to the running total

of sales. This makes it easy to analyze financial performance step by step.

Waterfall Chart
 Step by Step process:

- Open Tableau and connect to the Supermarket Sales dataset
- Click New Worksheet
- Drag Product line to the Columns shelf
- Drag Total to the Rows shelf
- Right-click SUM(Total) in Rows   select Quick Table Calculation   choose Running Total.
- In the Marks card, change the chart type to Gantt Bar.
- Drag SUM(Total) to Size in the Marks card to form the waterfall bars.
- Format the chart (colors, title like Financial Performance Breakdown) if needed.