Quick Table Calculations and Parameters.

Sleeper Ch. 13, 14

Agenda

Quick Table Calculations:

1. Running Total Numeric View
2. Month-Over-Month Difference in Sales DataViz

Tableau comes with several preset calculations that you can compute with the numbers on a view, including **running total**, **difference**, **percent difference**, **percent of total**, **moving average**, and more**.**

Start By Creating the Following Data View:

Monthly Sales by Category:

	Furniture	Office Supplies	Technology
January	$31,279	$33,663	$30,424
February	$16,057	$20,513	$23,343
March	$50,144	$56,264	$93,104
April	$40,879	$49,275	$51,697
May	$48,586	$43,394	$64,142
June	$49,850	$49,800	$47,433
July	$51,577	$43,217	$54,787
August	$45,488	$62,307	$51,795
September	$106,426	$102,774	$100,570

Add the Running Total Quick Table Calculation

Update from Sum(Sales) to Sales Running Total

- Right-click the **Sum(Sales)** pill from the **Text** Marks Card > **Quick Table Calculation** > **Running Total**

Change from left to right table calculations to top-down:

- Right-click the **Sum(Sales)** pill from the **Text** Marks Card > **Compute Using** > **Table Down**

DataViz: Month-Over-Month Difference in Sales

Create a line chart:

- Columns: Month(Order Date)
- Rows: Sum(Sales)

Add a second row to your Viz:

- Drag a second **Sum(Sales)** dimension to the **Rows** shelf
- Right-click the pill > **Quick Table Calculation** > **Difference**

DataViz: Month-Over-Month Difference in Sales (Cont.)

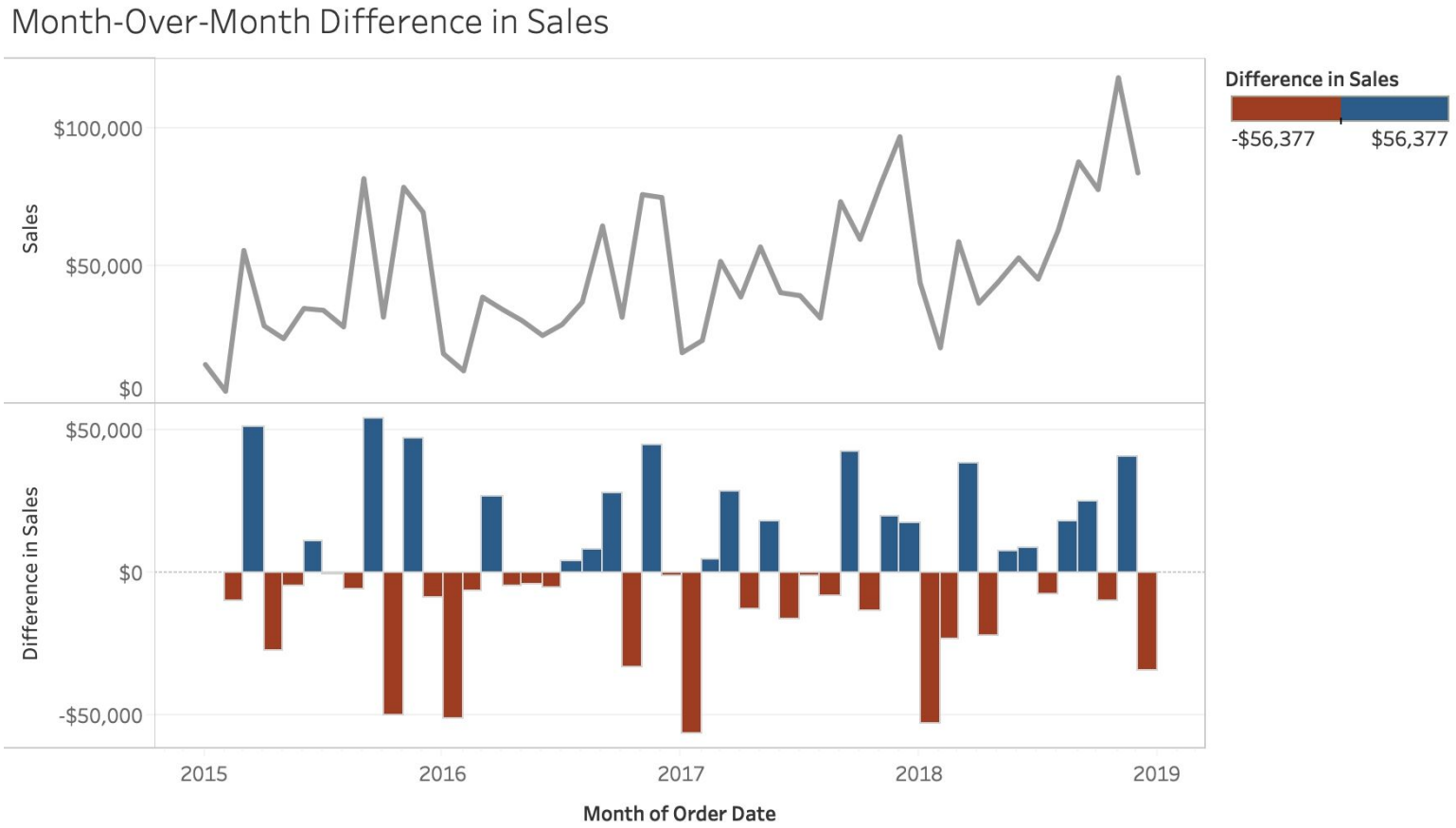
Find a set of Marks Cards for the 2nd Row.

Switch from a line to a bar chart:

- Marks Card Type: Bar

Utilize two solid colors for the bar chart:

- Color Marks Card: Sum(Sales); Right-click the pill > **Quick Table Calculation > Difference**
- Click on the **Color** Marks Card > **Edit Colors...** > Check **Stepped Color 2 Steps**



The trends of sum of Sales and Difference in Sales for Order Date Month. For pane Difference in Sales: Color shows Difference in Sales.

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Parameters are user-generated values that are not attached to a dataset.

We are going to create a simple equation for 2 multiplied by X, where X is the parameter, and **the end user gets to choose the value of X**.

2 * X Overview:

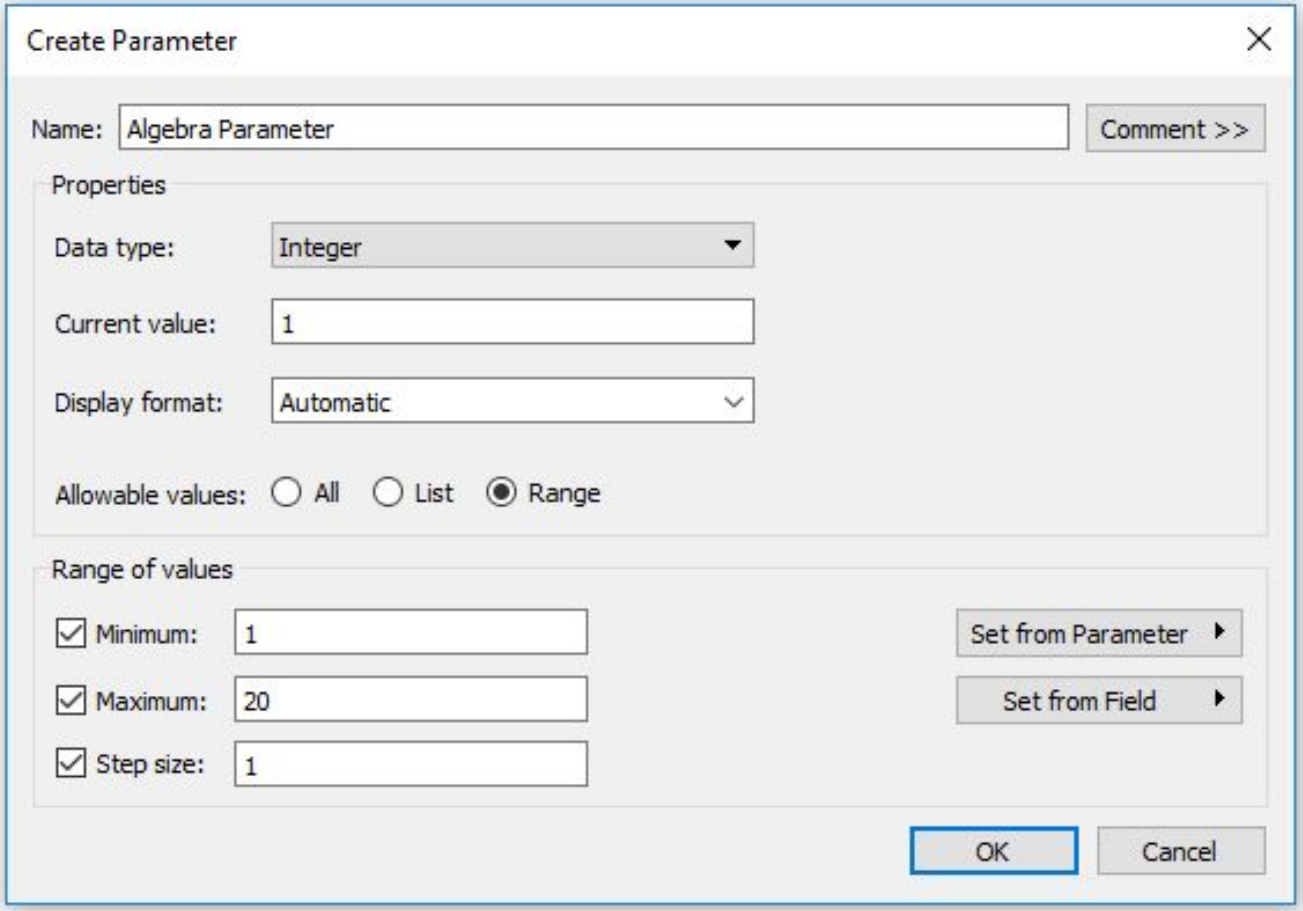
1. Create a Parameter: an integer from *1* to *20*
2. Create a Calculated Field: *min(2) * <Parameter value>*
3. Display the Calculated Field on the view
4. Allow the end user to enter the Parameter value

1. Create a Parameter

To create a new parameter in Tableau:

(a) click on the down arrow  in the top-right corner of the Dimensions area of the Data pane > **Create Parameter...**

(b) right-click blank space on the Data pane Shelf > **Create Parameter...**



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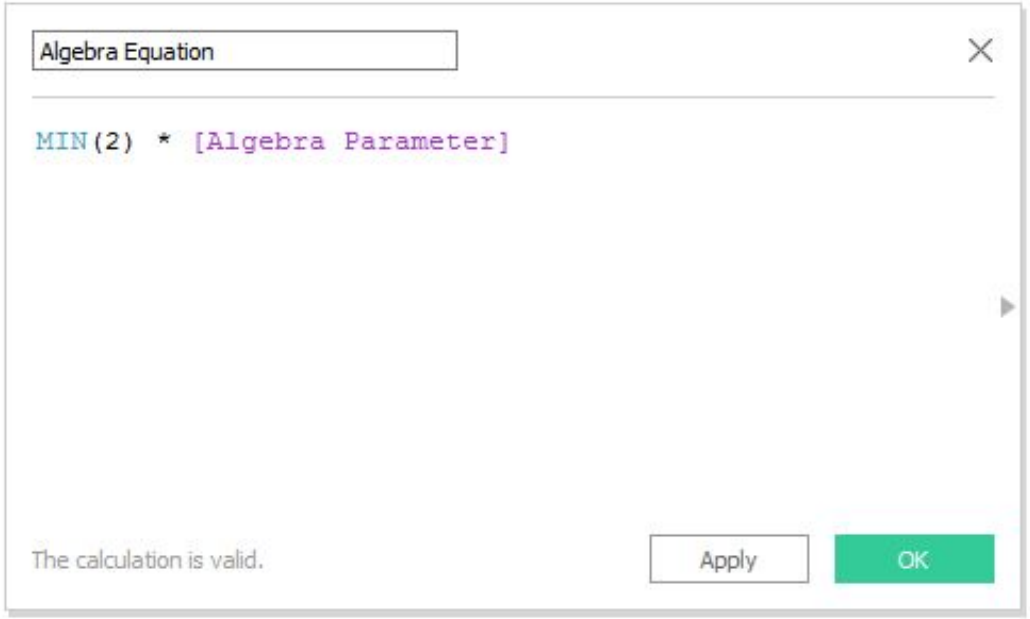
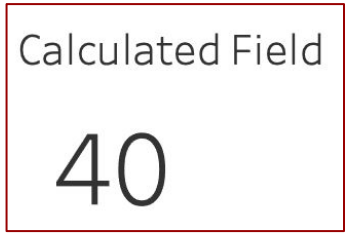
2. Create a Calculated Field

2*[Algebra Parameter] calculation would get an answer of 19,988, which is 2 multiplied by 1, multiplied by the number of records in the dataset (9,994).



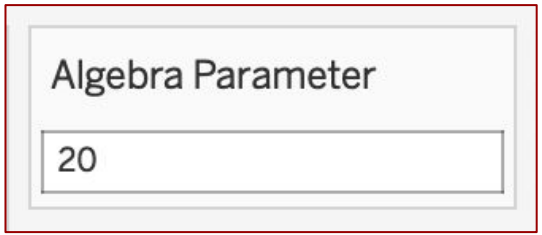
3. Display the Calculated Field:

- Text Cards Mark: AGG(Algebra Equation)



4. Allow the end user to enter the value:

- Right-click the **Algebra Parameter** > **Show Parameter Control**



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