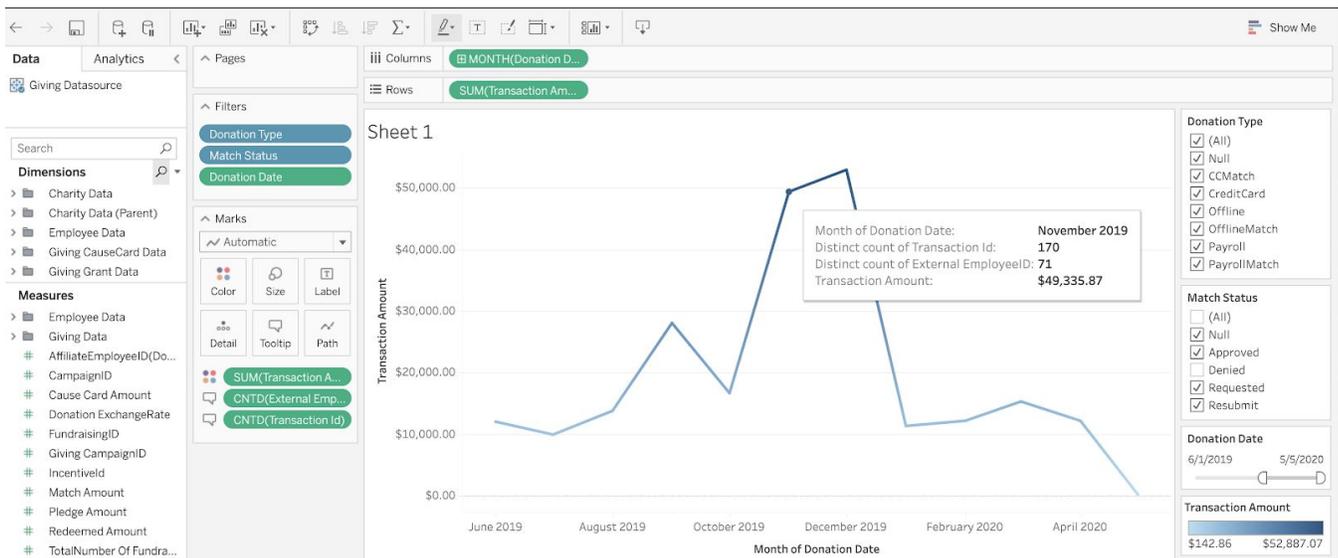


# Tableau: Linear Graphs

A Tableau visualization that makes it simple to analyze data over time.

## Reasons to use a line graph:

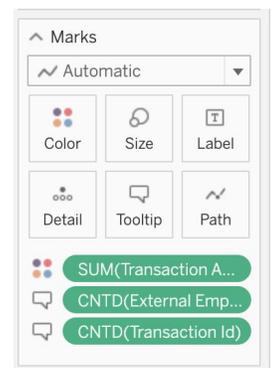
- See a trend over time
  - Example: Which months have the highest amount of giving or volunteering?
- Easily see what the most active month, quarter, year, etc. is
  - Pro tip: A way to see if marketing campaigns were effective (email blasts, company announcements, disaster relief, etc). You'll see a spike when marketing campaigns were launched.



## How to make a line graph:

Example shown: Giving trends by month

1. Determine what your rows/columns will be
  - a. Transaction Amount on the left side (y axis) - Row
  - b. Donation Date/month on the bottom (x axis) - Column
    - i. This may default to show by year, but you can click the arrow next to it and convert it to Month. Be sure to select the month that shows as 'Month Year'
2. A line graph should automatically show, but if not, click "Show Me" in the top right corner and select the line graph icon
3. Add in your filters
  - a. Example common filters:
    - i. Donation Type
    - ii. GrantRequest Status
    - iii. Donation Date
    - iv. Giving Campaign Name (only applicable to giving campaign clients)
4. Add in Tooltips
  - a. To gather more information, you can drag other measures into the 'Tooltip' section under 'Marks'. This will show that data when you hover over a data point. You can also drag data points into 'label'. 'Label' will show the data

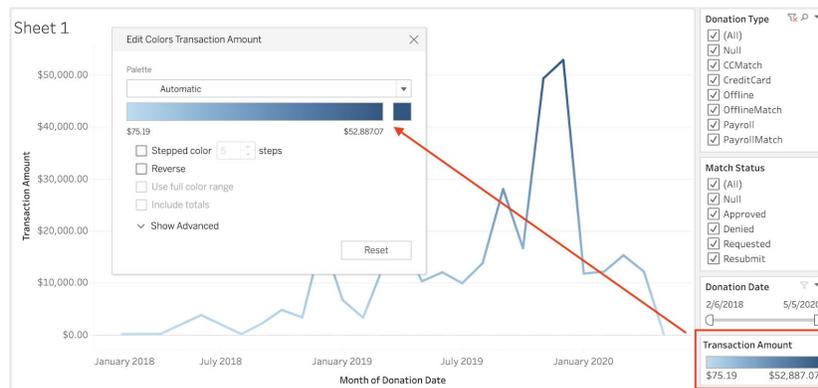
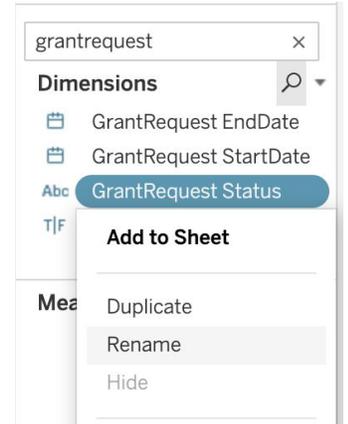


points right on the graph itself (be careful because this can make it look messy)

- i. Example: Count Distinct of EmployeeID in Tooltip will show how many unique employees donated. Count Distinct of Transaction ID will show how many transactions there were.
  1. To make Employee ID or Transaction ID a count distinct, drag the dimension into tooltip, then click the arrow next to it, hover over 'measure' and select Count (distinct)

### Fancy Pro-Tips:

1. Change the name of a dimension or measure to better match the language that you use by hovering over the dimension/measure and clicking the down arrow on the right of it. Select 'rename' and give it a user friendly name.
  - a. Example: GrantRequest Status is what Tableau names what most companies call Match Status
2. To add color to the line to be darker for higher results, you can drag the measure to the 'Color' box under Marks.
  - a. Using the example described above, dragging the measure 'Transaction Amount' into color will make the donations made in higher months (December 2019) a darker color than months with less donations.
  - b. You can change the color (brand to your company for bonus points) by clicking the down arrow next to the color filter on the right of the graph.



3. Easily find the dimensions and measures you want by utilizing the search bar listed above dimensions. Search for terms such as "ID" or "Transaction" or "Date" to easily find what you need without scrolling.