



Free Training Transcript: Waterfall Charts

Welcome to this How-to video on creating Waterfall Charts. You can download the Exercise workbook to follow along in your own copy of Tableau.

What is a Waterfall Chart?

A waterfall chart shows the running total of a particular measure (usually with positive and negative values) over a dimension. It shows the relationship of each dimension member against the running total—that is, how each member is contributing to the overall total, either positively or negatively.

Building a Waterfall Chart

To create a waterfall chart, let's start with a basic view—profit over time. First, we need to change the measure to be a running total. Right click on the Profit pill and add a quick table calculation “Running Total”. Note that the default chart type here is a line. The second step is to change the mark type to Gantt. This draws a line at the value of each month's running total of profit.

Next, we'll size each mark by negative profit. This essentially stretches each Gantt bar's height to line up with the start of the previous bar. Note that negative bars need to grow upward, and positive bars need to grow downward, which is why we need negative profit. So the third step is to create that calculated field for Negative profit. Right click on Profit and select Create Calculated Field. Enter a minus sign in front of Profit, and name the field “Negative Profit”, then click ok. Fourth, bring Negative Profit to size. And last, bring Profit to color.

Summary of Steps

To summarize, a waterfall chart is made by having a measure displayed over a discrete dimension

- 1) Apply a Running Total quick table calculation to the measure
- 2) Change the mark type to Gantt
- 3) Size by negative (whatever your measure is)

Thank you for watching this How to video on Waterfall Charts. We invite you to continue with the Free Training videos to learn more about using Tableau.