Questions, Instructions and Requirements for the Project

Project: Superstore Sales Performance using Tableau.
(A capstone project given by upGrad)

This contains all the instructions, business requirements, formatting requirements and questions to solve the project.

Instructions:

- Use Superstore.xls data.
- Note that you can use either Tableau Public or Desktop to find the answer.
- If you are using Tableau Desktop, the Sample Superstore dataset should be present in the Saved Data sources and will also be present in your My Tableau Repository folder on your local machine.
- Data should be an extract and not a 'Live' connection.

Tableau Project Requirement:

- The workbook should have a single dashboard.
- Each worksheet/view/chart should meet the business requirement.
- All worksheets should be hidden.
- Workbook should be published to Tableau Public if possible.

Submission Guidelines:

- Copy-Paste the screenshots for every view in a word document and upload the document for verification.
- Provide the screenshot of the final dashboard as per the requirements mentioned in the project.
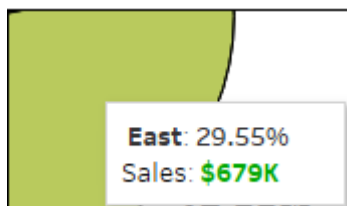
Business Requirement:

Connect to the Sample Superstore dataset and build a Dashboard that will show the Sales Performance.

View 1: Total Sales
- The sheet should only display the Total Sales in thousands, along with the header "Total Sales".

- The Total Sales displayed should have the colour code "#76b7b2". Use the Colour Palette.
- Disable Tooltip for this view.
- Use the background colour of your choice.
- Name the sheet as "Total Sales".
  View 2: Total Profit
- Requirements are the same as for the view "Total Sales".
  View 3: Total Volume
- Requirements are the same as for the view "Total Sales", except it's not a currency value.
  View 4: Sales per Customer
- Requirements are the same as for the view "Total Sales".
  View 5: Pie Chart
- Pie Chart should display the percent of Total Sales by Region.
- Use the Summer Colour Palette. Pie Chart should have black borders.
- Tooltip should be formatted as seen below showing Region Name, Percent of Total Sales, and the Total Sales value formatted in currency and displayed in thousands (K).

Note: Drag all the filters mentioned in the general requirement to this sheet named Pie Chart.

View 6: Bar Chart
- Horizontal Bar Chart should display the top N states by Sales.
- Using a Parameter, the user should be able to change the value of N.
- Use the colour of your choice for the bars along with the labels displayed in $.
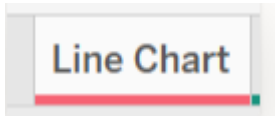- Data should always be sorted in descending order.
  View 7: Bubble Chart
- Bubble chart should display Sales by sub-category.
- Bubbles should be coloured by category.
- Use the colour of your choice for the bubble.
- Tooltip should display only sub-category along with the sales value in $ in thousands (K).
  View 8: Line Chart
- A continuous line chart should display the Sales trend by Month-Year.
- X-axis should display month and year in the format MMM YY. For example, Mar 22 [Year 2022].
- Hide the axis titles only

- Tooltip should display only Month-Year, along with the sales value in $ in Thousands (K).
- Use Order Date as a Date Range filter.
- Name the sheet as shown below and colour the tab.
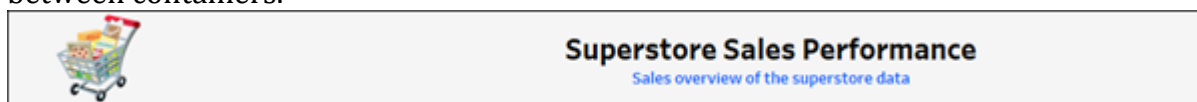
Line Chart

Dashboard Requirements:

- Dashboard Name: Sales Dashboard
- Dashboard Title: Superstore Sales Performance
- Dashboard description: Sales overview of the superstore data
- Dashboard size: Should be set to FIXED size. Width – 1055, Height – 850
- Dashboard Filters:
- Filters to be present in dashboard:
1. Order Date – Show as Range of date. This filter should be applied to all worksheets.
2. Segment – Show as multiple values (drop-down) with the Apply button and showing only relevant values. This filter should be applied to all worksheets.
3. Ship Mode – Show multiple values (drop-down) with the Apply button and show only relevant values. This filter should be applied to all worksheets.
4. State – Show multiple values (drop-down) with the Apply button and show only relevant values. This filter should be applied to all worksheets except the bar chart.
- Filter Formatting:
1. Format the filter background to any colour.
2. Add borders if necessary.
3. Place all these filters in a horizontal container and distribute them evenly.

Dashboard Containers:

- Horizontal Container 1: Should have the name of the dashboard and add an image showing a shopping cart (add an image with transparent background) to the left of it as shown below. You can rename this container "Title/Logo" as it will help you distinguish

between containers.

- Horizontal Container 2: This should contain all the filters arranged in a horizontal container. Name this container "Filters". Distribute the contents evenly.

- Horizontal Container 3: Arrange all the scorecards in a horizontal container.

- Horizontal Container 4: Pie Chart and Bar Chart should be arranged and placed in a horizontal container. Name it accordingly.
- Horizontal Container 5: Bubble Chart and Line Chart should be arranged and placed in a horizontal container. Name it accordingly.
- Vertical Container: Place all these horizontal containers one above the other, top to bottom, in the order they are numbered.

Dashboard Formatting:

- Legends: Hide the titles for the legends and place it next to their associated charts in such a way that they don't overlap with the chart.
- Borders: Add borders if needed per chart or per container, whichever is visually comprehensive.
- Actionable Filters:
- Use the Pie chart and Bubble chart as Actionable Filters.
- Parameters: Place the parameter close to the Bar chart and place it somewhere on the Sheet title.
- Fit View: Fit the Dashboard to "Entire View", wherever applicable.
- Sheet Titles: Describe each visualization with a meaningful title.
- Hide Sheets: After the dashboard is all set to be published, hide all the sheets, and clean up your workbook. Also, you can hide all unused fields if needed.

THANK YOU