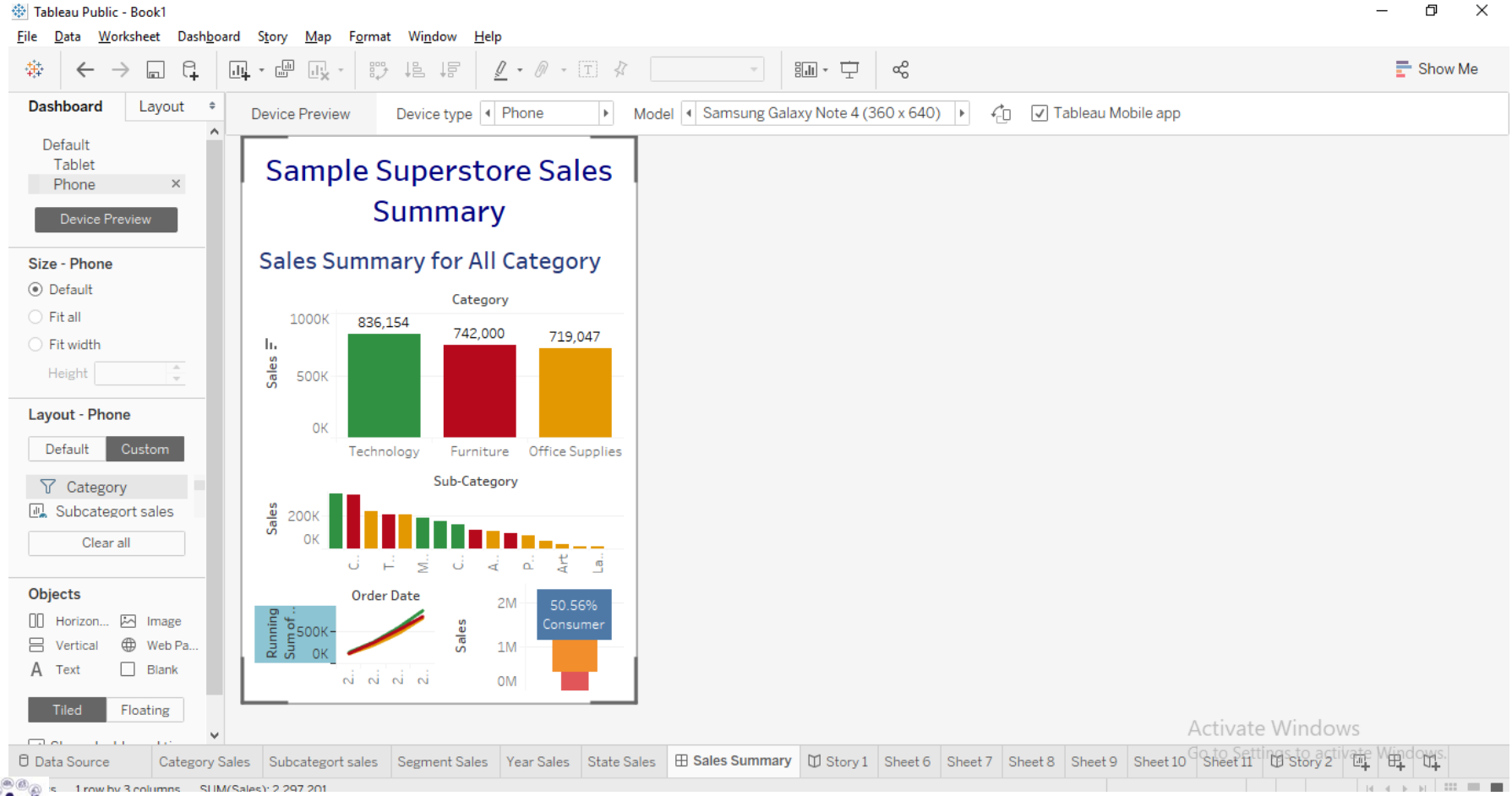
Dashboard Actions

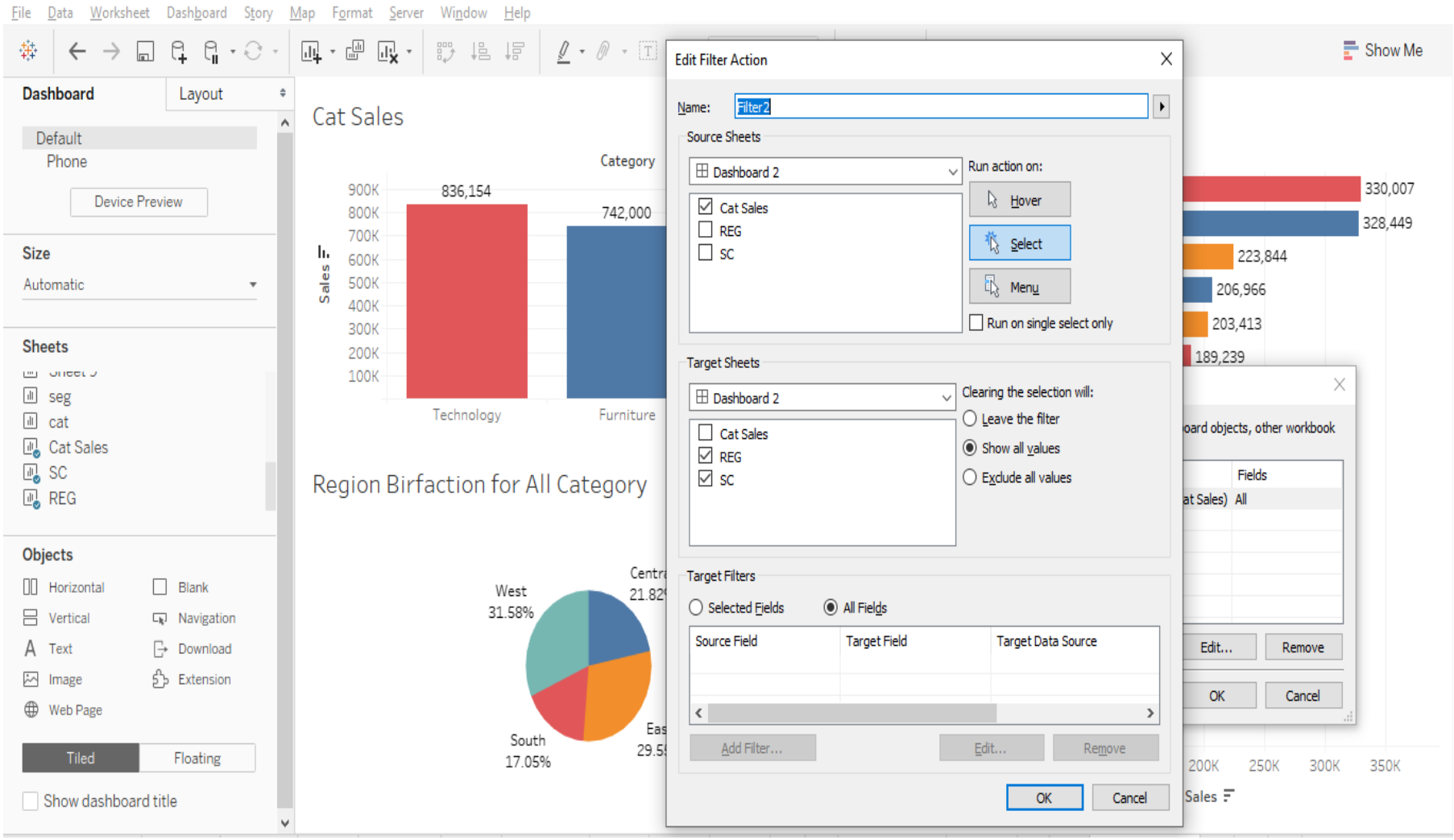
- Action Filter
- Action Highlight
- Action URL
- Navigation Actions
- Parameter Action
- Action Set

Device Designer

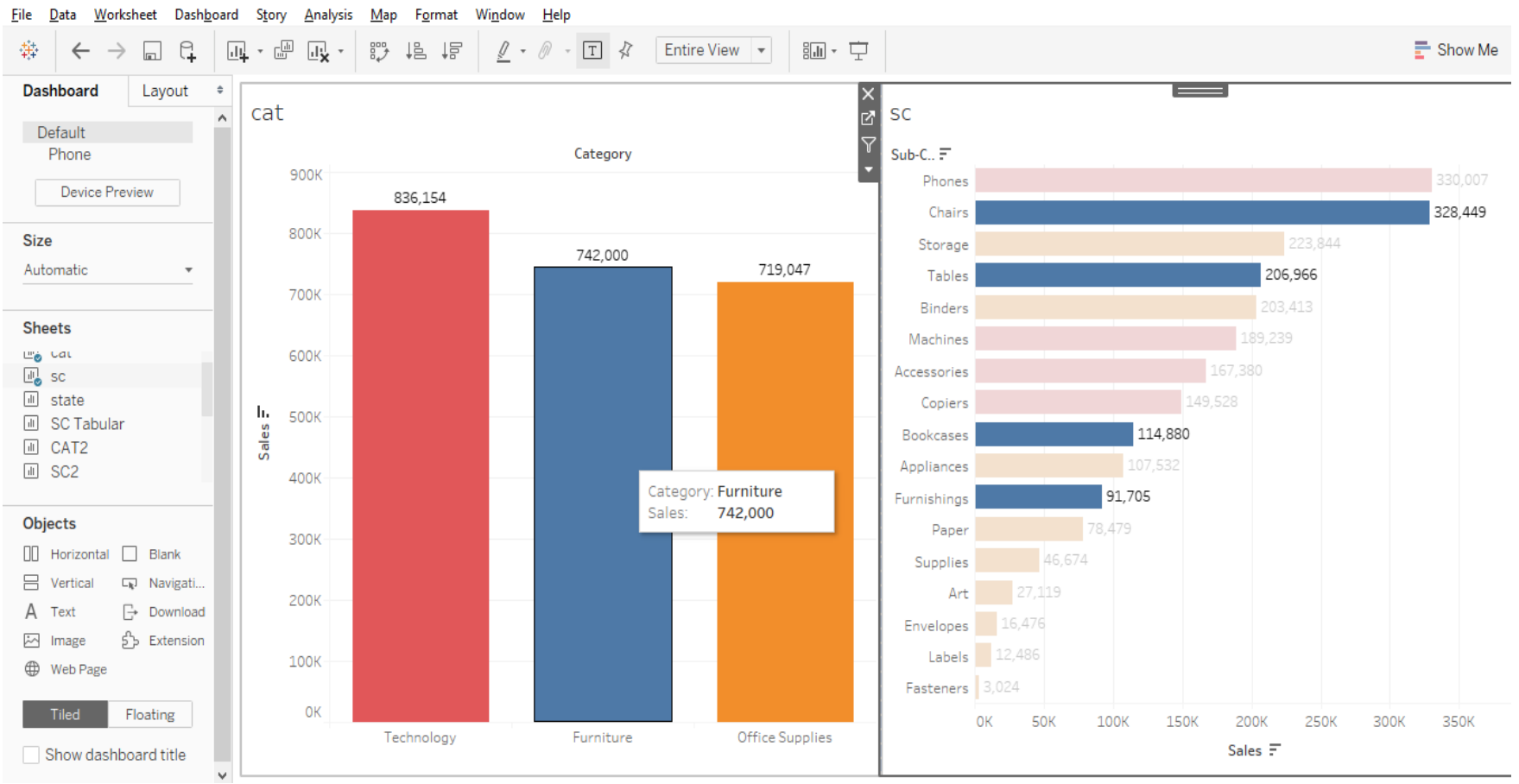
Tableau helps us to design the layout so that it is properly visible on different devices - desktops, Cell Phones & Tablets.



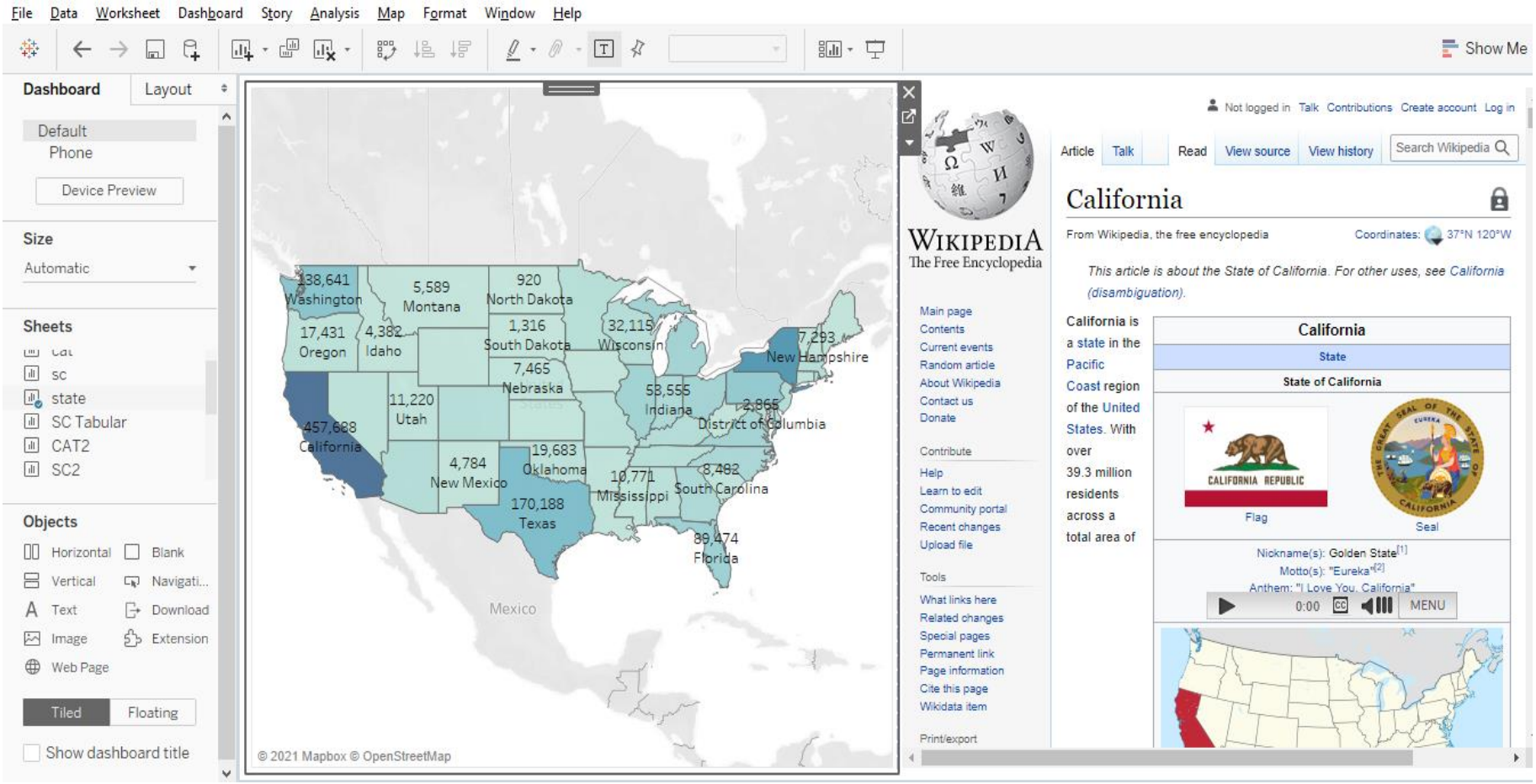
Dashboard Actions -Action Filter



Dashboard Actions -Action Highlight

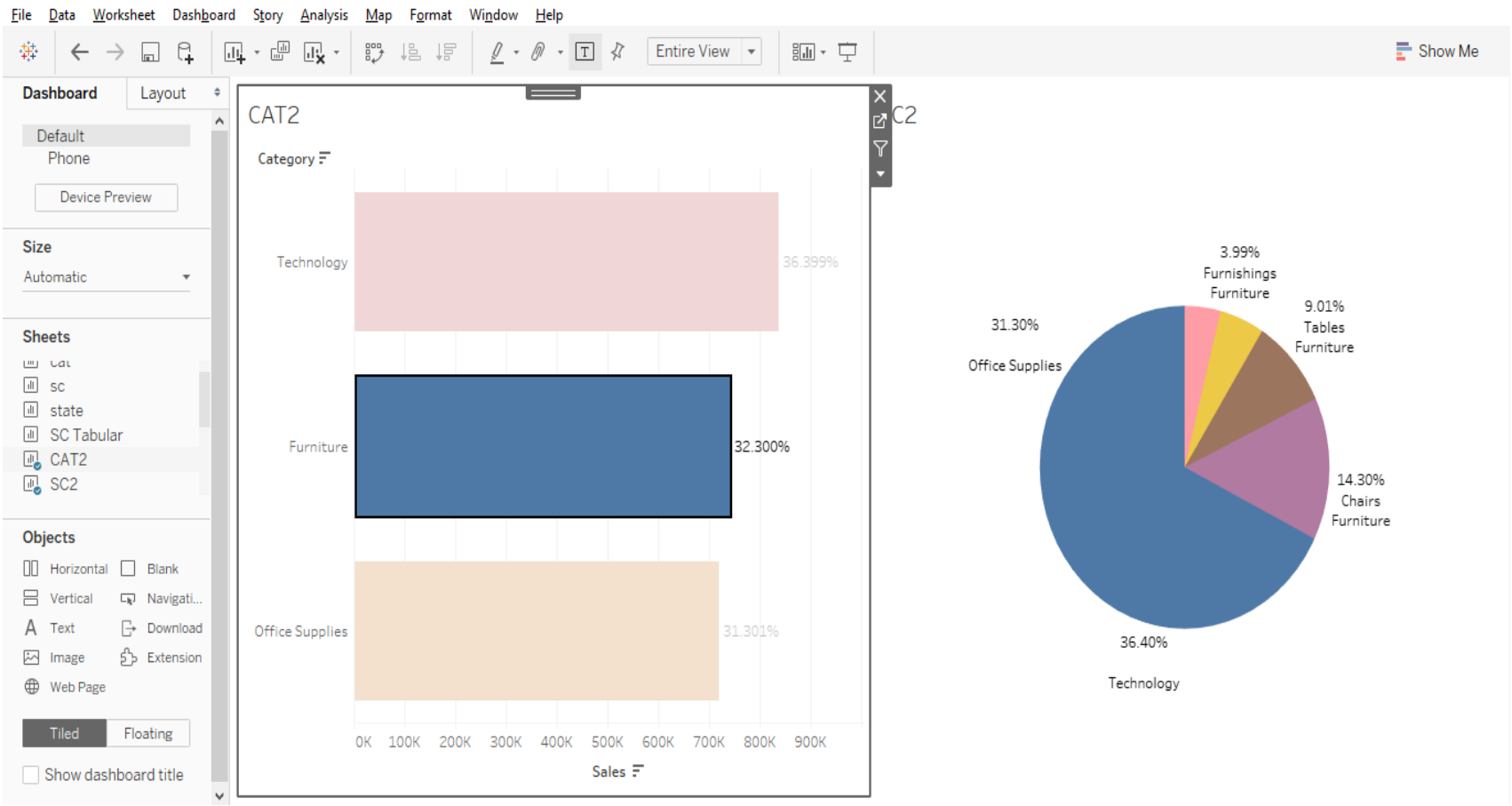


Dashboard Actions -Action URL



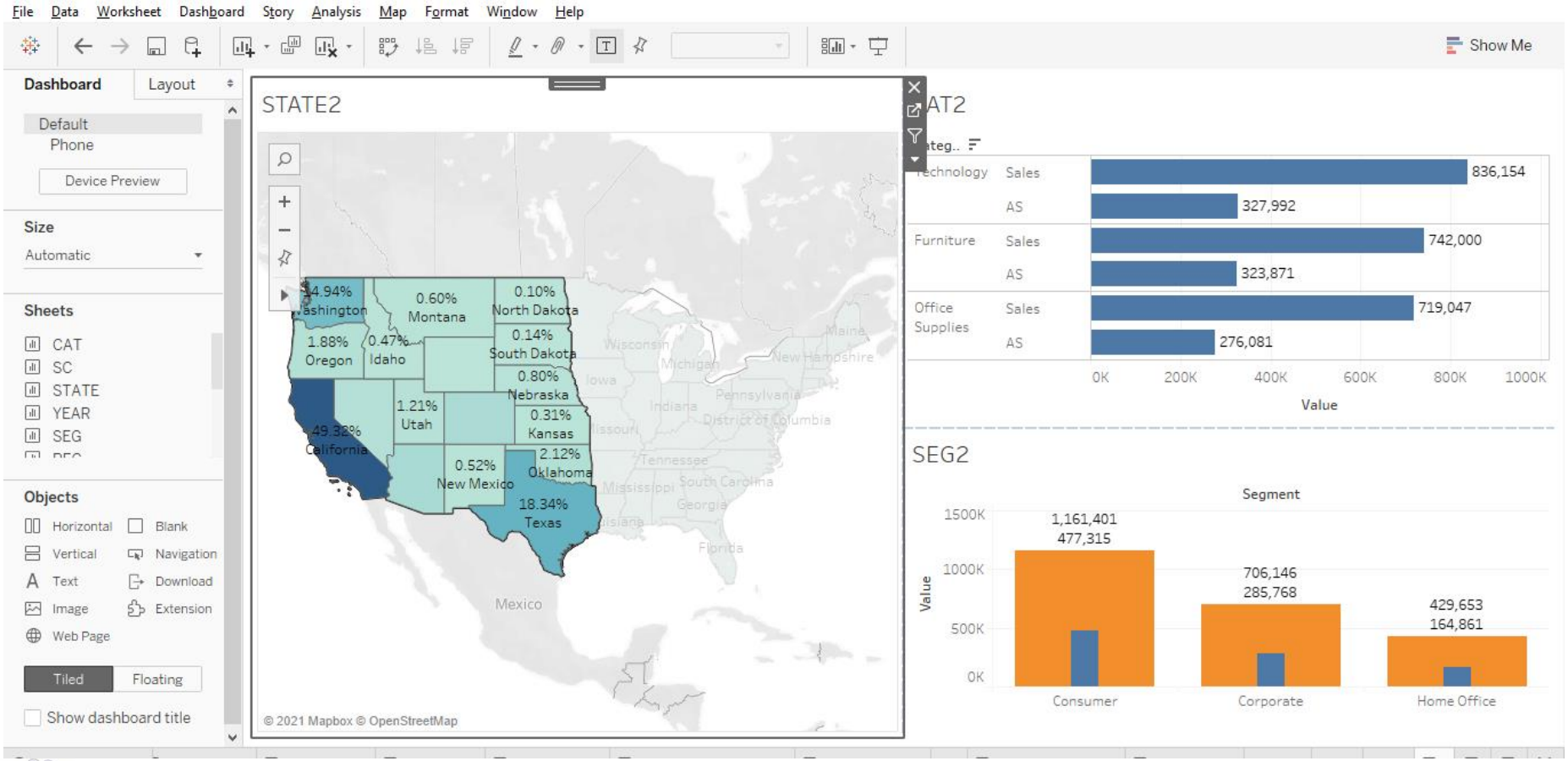
Dashboard Actions -Action Parameter

- Create a Parameter
- Create a calculated field using parameter
- Use Parameter Action to assign the value to parameter



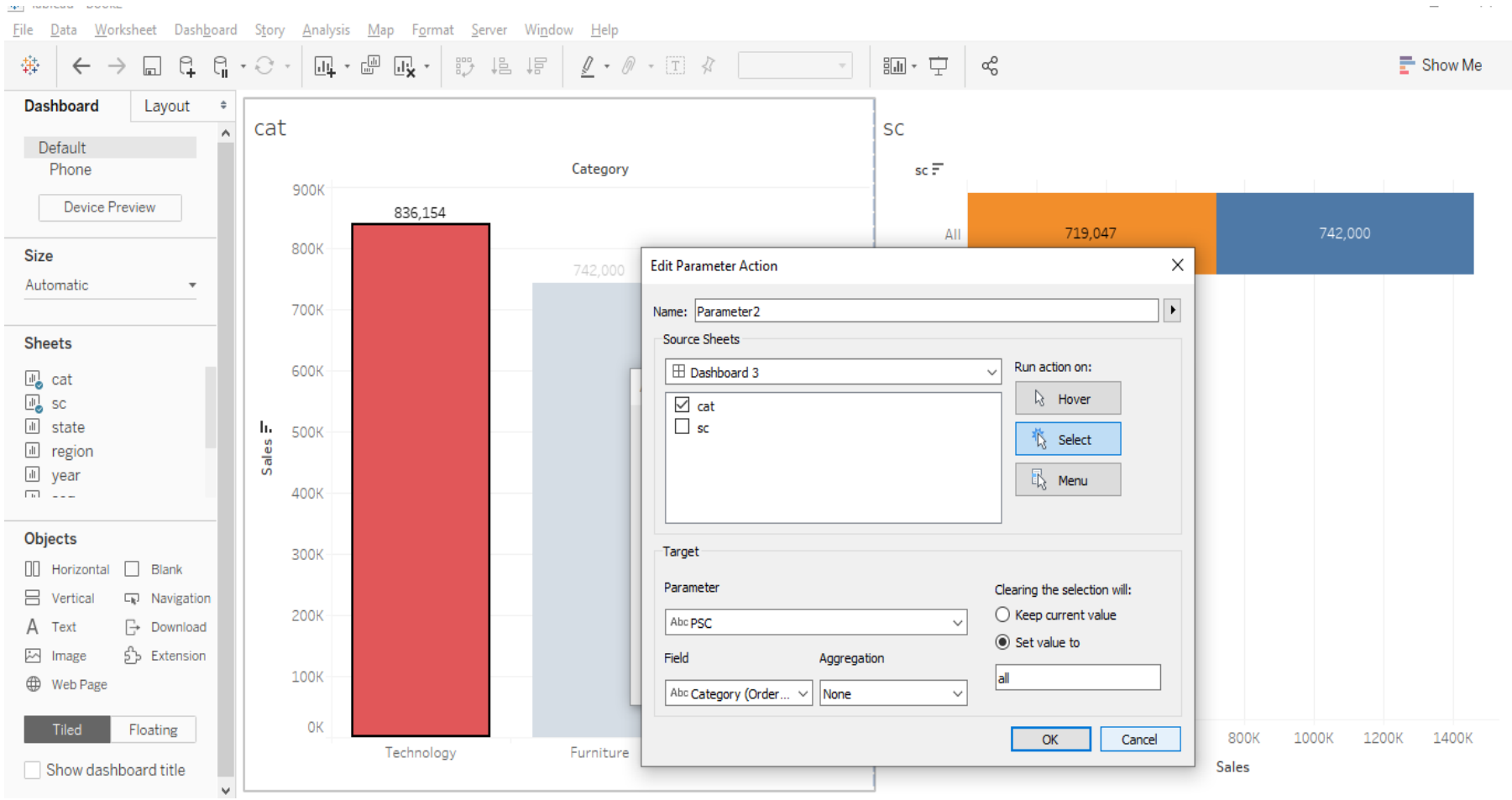
Dashboard Actions -Action Set

- Create a empty Set
- Created a calculated field using Set
- Assign the set to color
- Use set Action to change the value of set



Dashboard Actions

Parameter Action



ASSIGNMENT

Create a dashboard for sample superstore sales summary which should present:

- Year Wise sales for each region,
- Percentage contribution of each region in over all sales.
- State wise revenue earned.
- Category wise Sales with region details.
- Subcategory sales region wise.

The dashboard should be interactive on the basis of Region.

ASSIGNMENT

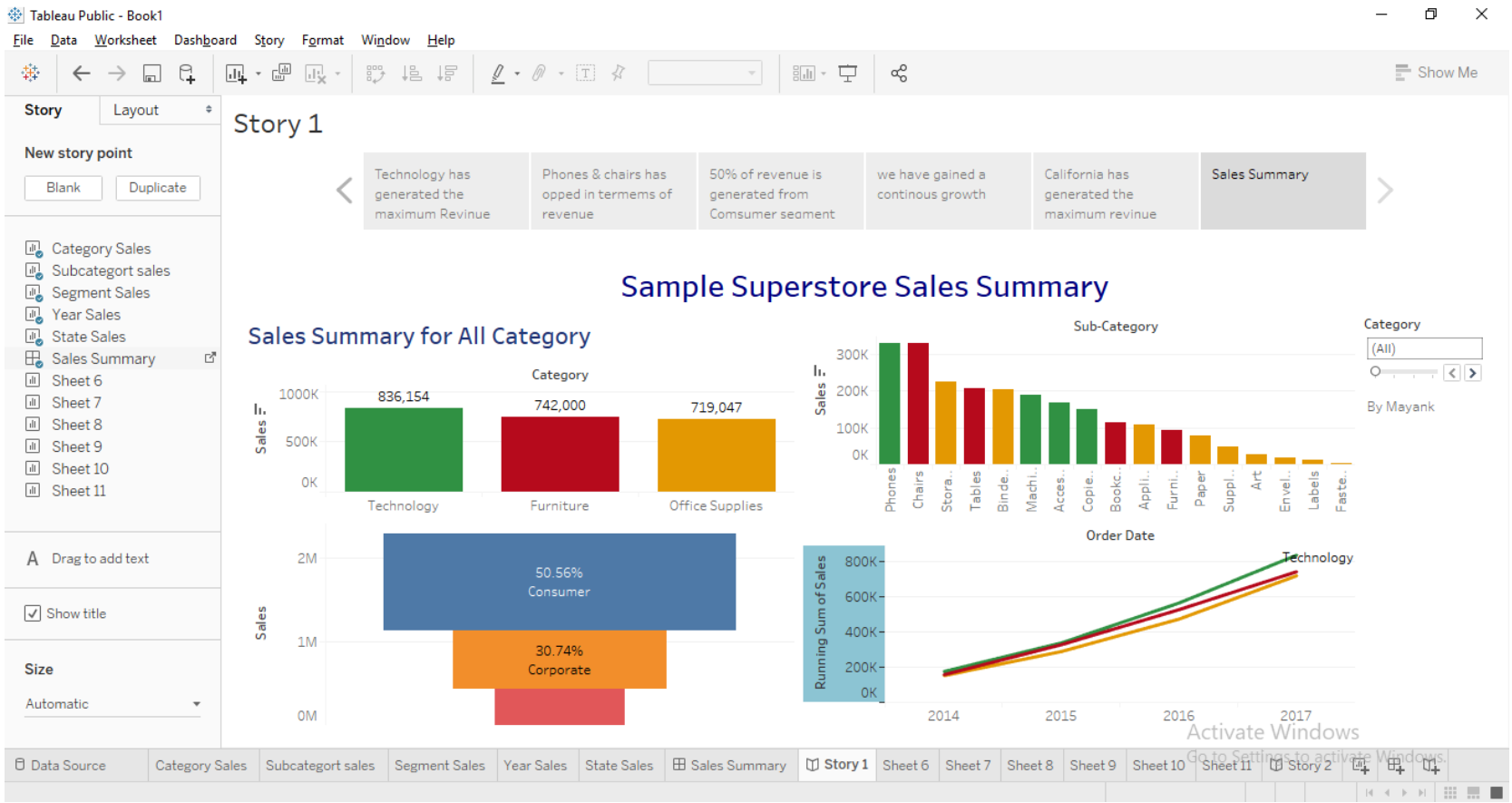
Create a Interactive dashboard for sample superstore Profit summary which should present:

- Month Wise profit earned in each category, Min & Max profit should be displayed.
- Category wise Profit with region details.
- Subcategory wise profit (use waterfall chart).
- Segment wise profit percentage.
- Percentage contribution of each region in over all profit.
- State wise profit earned (Word Map)

The dashboard should be interactive on the basis of Category.

Story Point

Story point is sequential way of analyzing the visualized data. This will give us different analysis at one place.

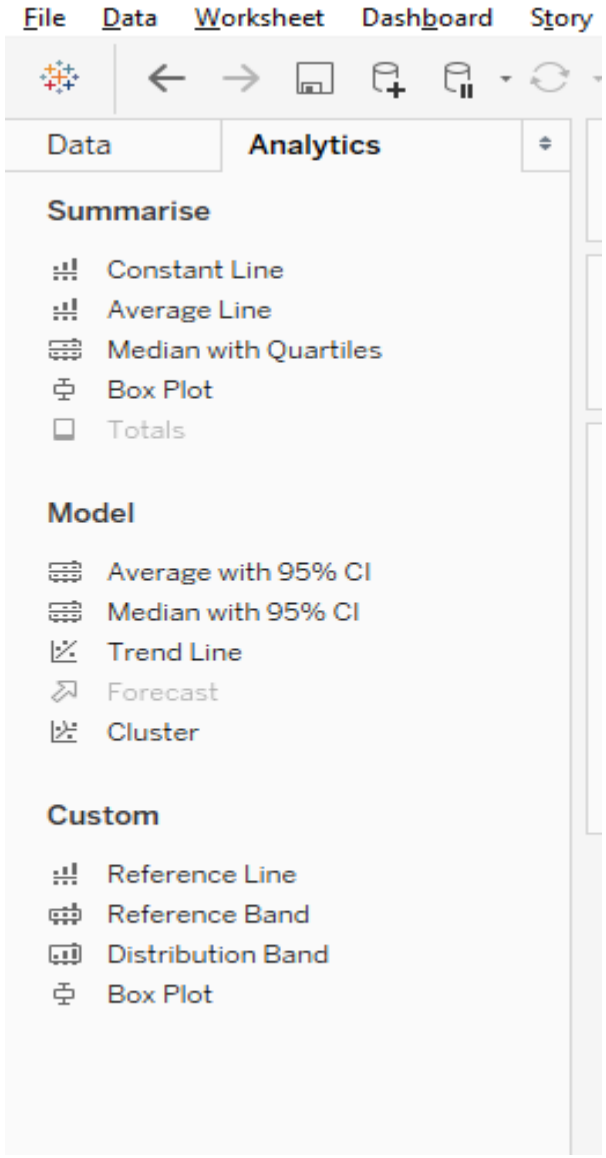


Analytics Pane

The Analytics Pane in Tableau gives you the various tools to analyze your data on the basis of different statistical model.

Analytics Pane has three sections:

- Summarise
- Model
- Custom



Forecasting

Forecasting is a process of predicting the future trend by identifying regular patterns in measure values.

Forecasting is a process of predicting the future trend by identifying regular patterns in measure values.

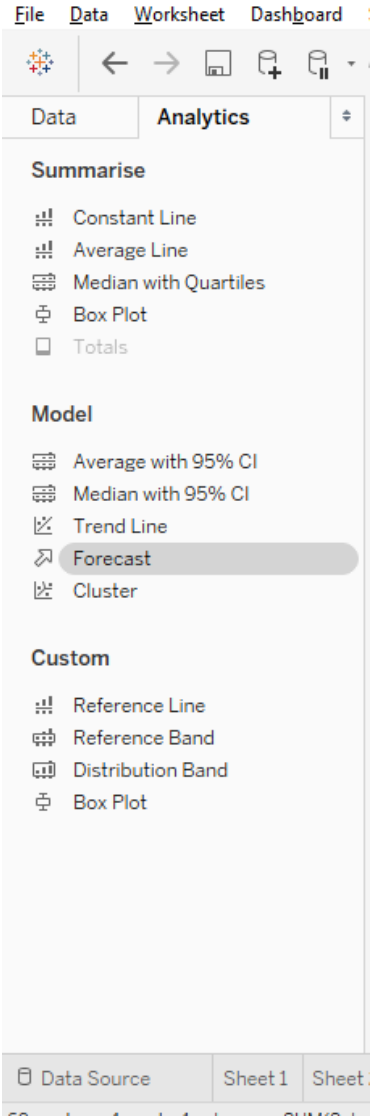
This technique of identifying regular patterns from existing data values and giving a forecast is known as **Exponential Smoothing.**

There are two important concepts on which the process of forecasting is based:

Trends - increase or decrease in data over time

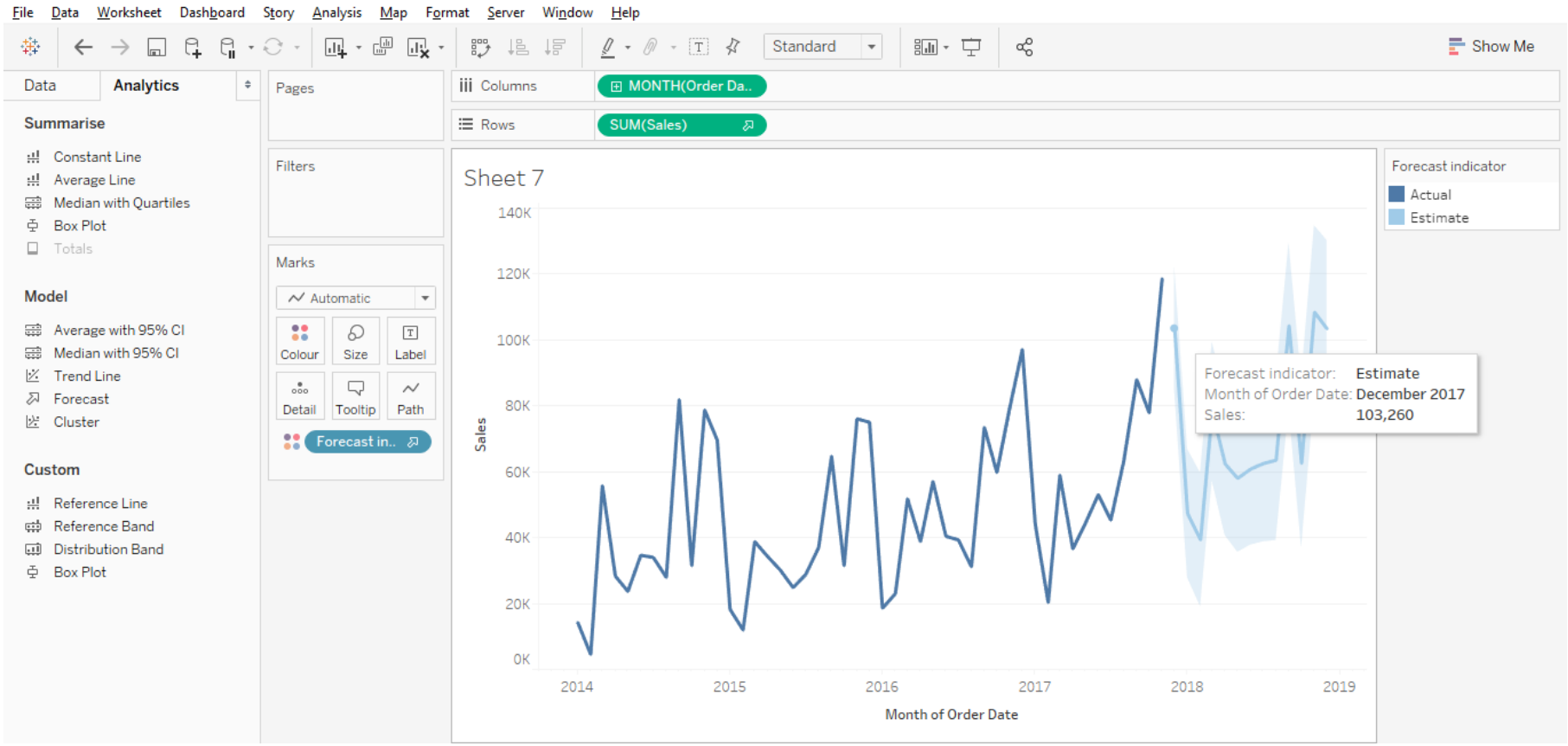
Seasonality - repeating variation in values over a determined period of time (such as weekly, quarterly, yearly, etc) known as seasons

In Tableau forecasting is automatic. We just need to drag the forecasting option from Analytics pane



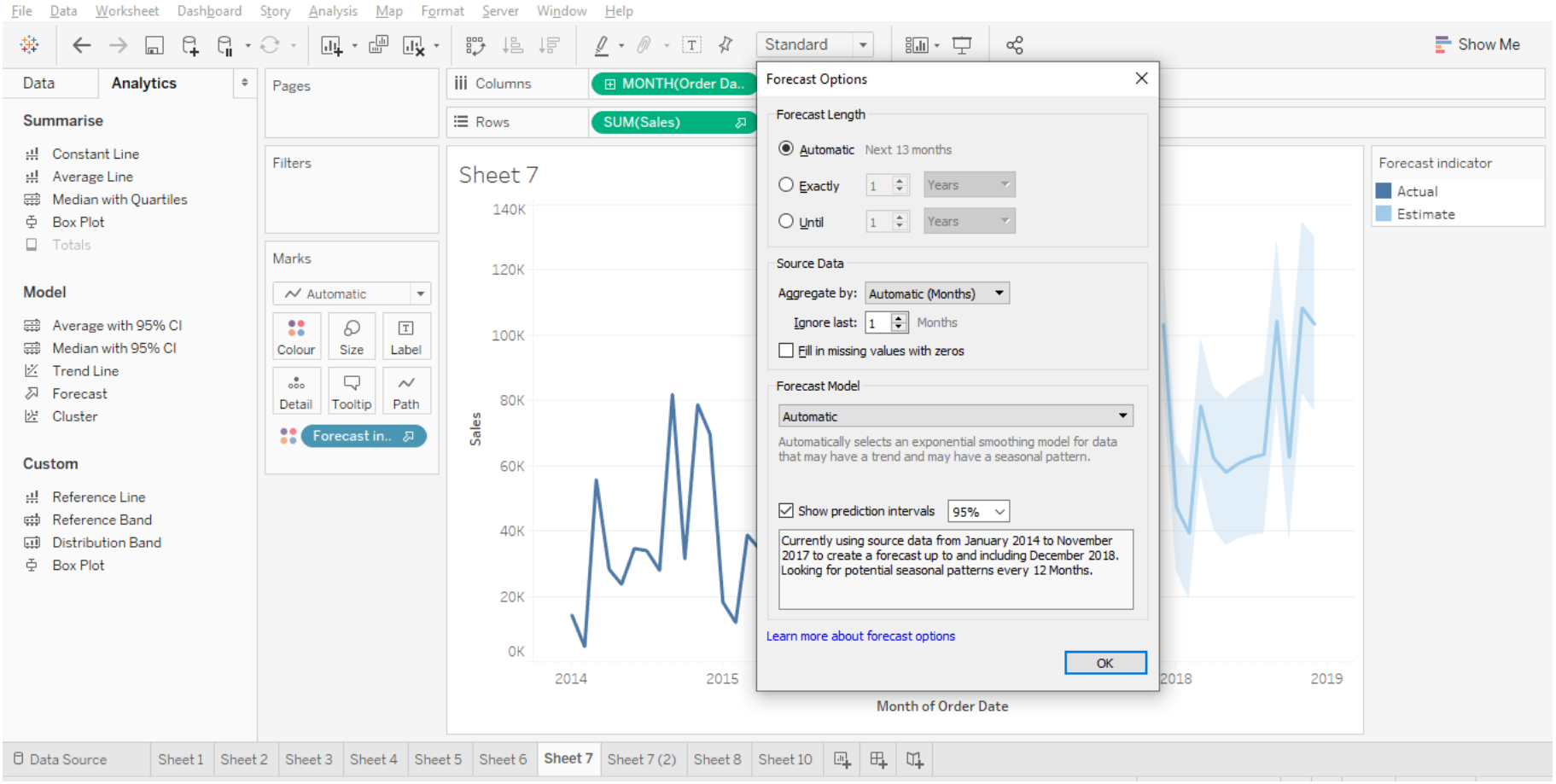
Forecasting

To create a forecast you need to have a line chart, Tableau will extend the line chart to add forecast to it



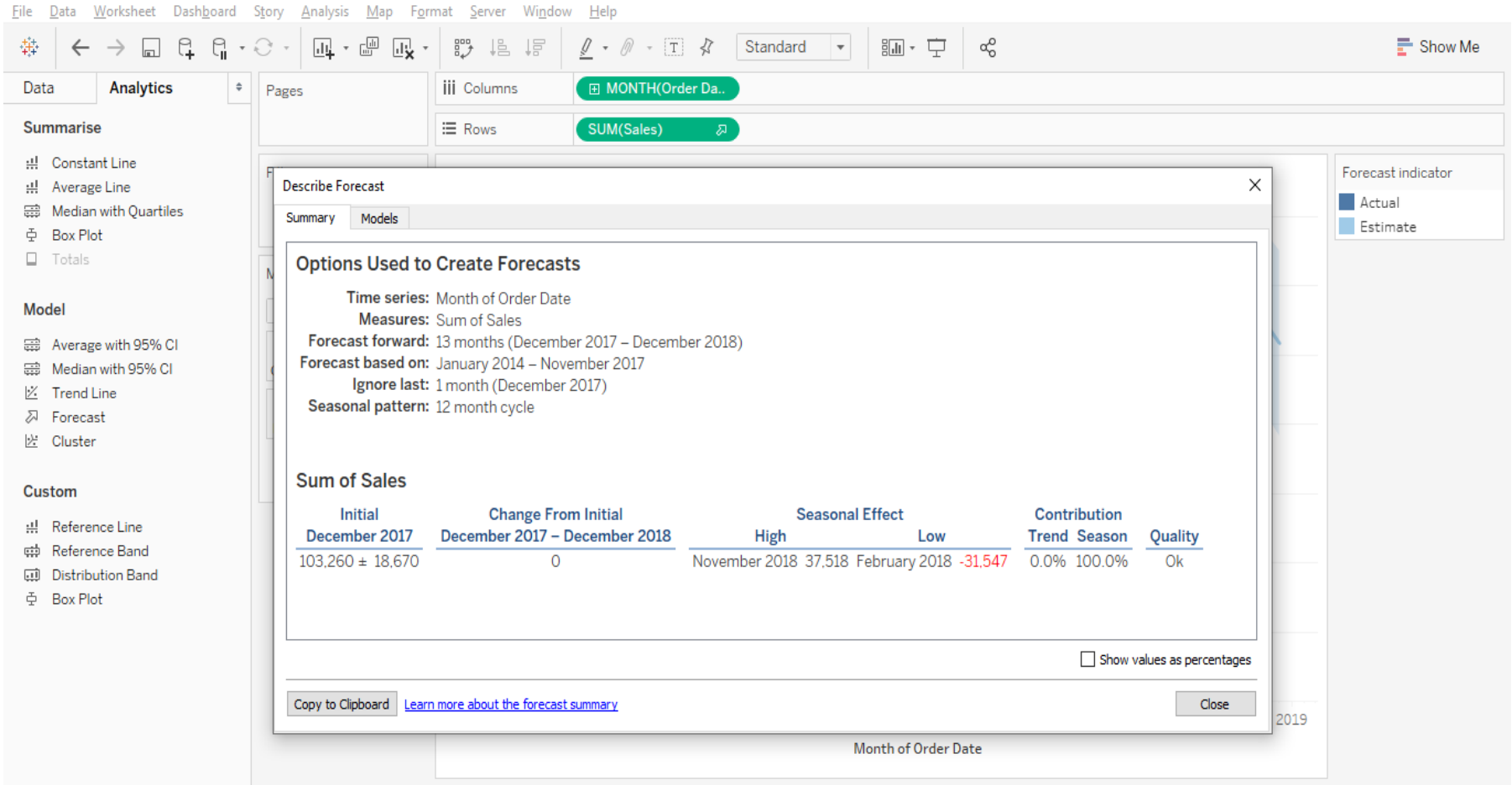
Forecasting

To get more information about forecast you can go to the Forecast options



Forecasting

Describe Forecast can also be used to get more information about forecast

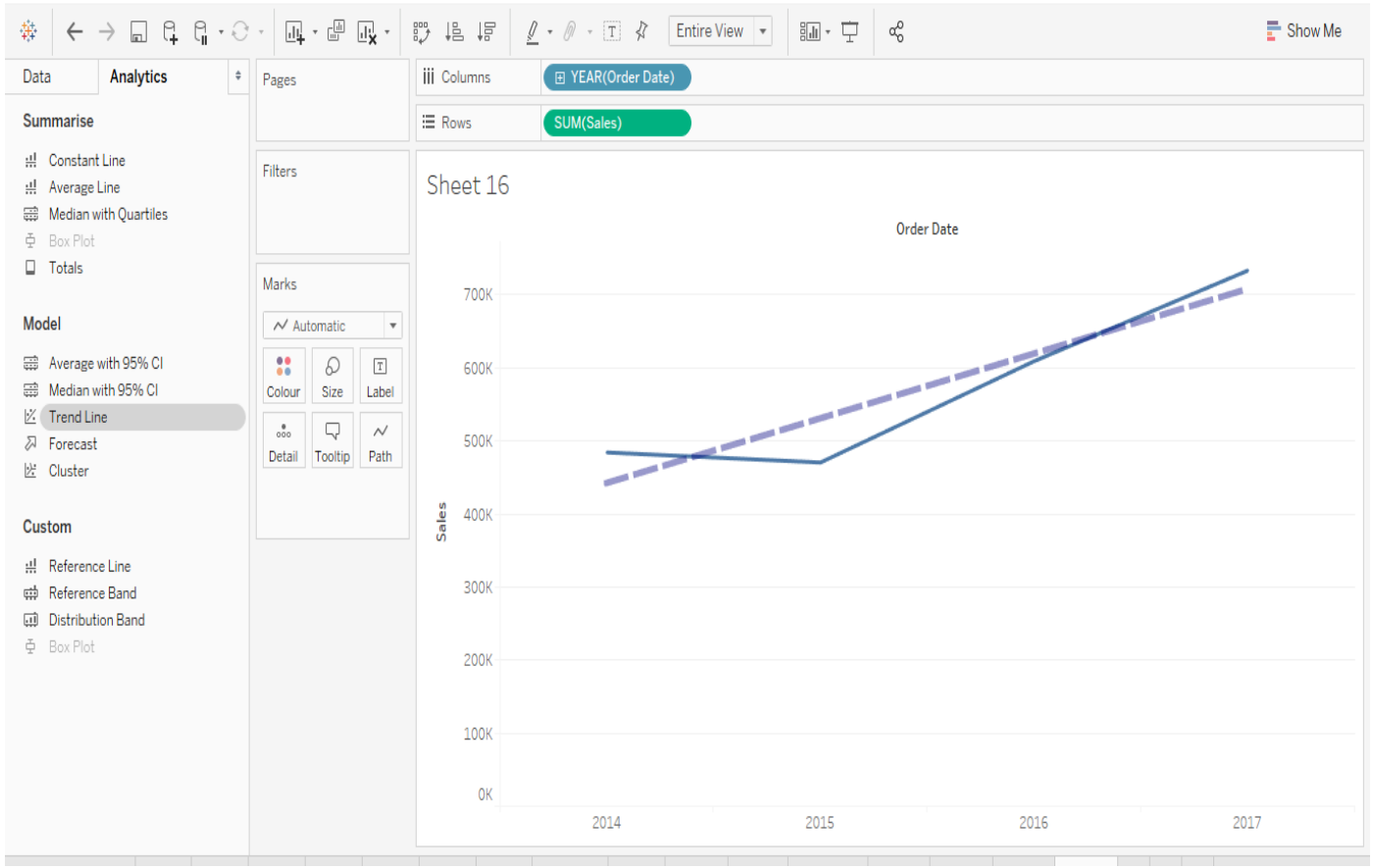


Trend Lines

A trend line is a line showing the patterns or trends emerging from data points. In Tableau, we can have straight or curved trend lines depending on the model you select.

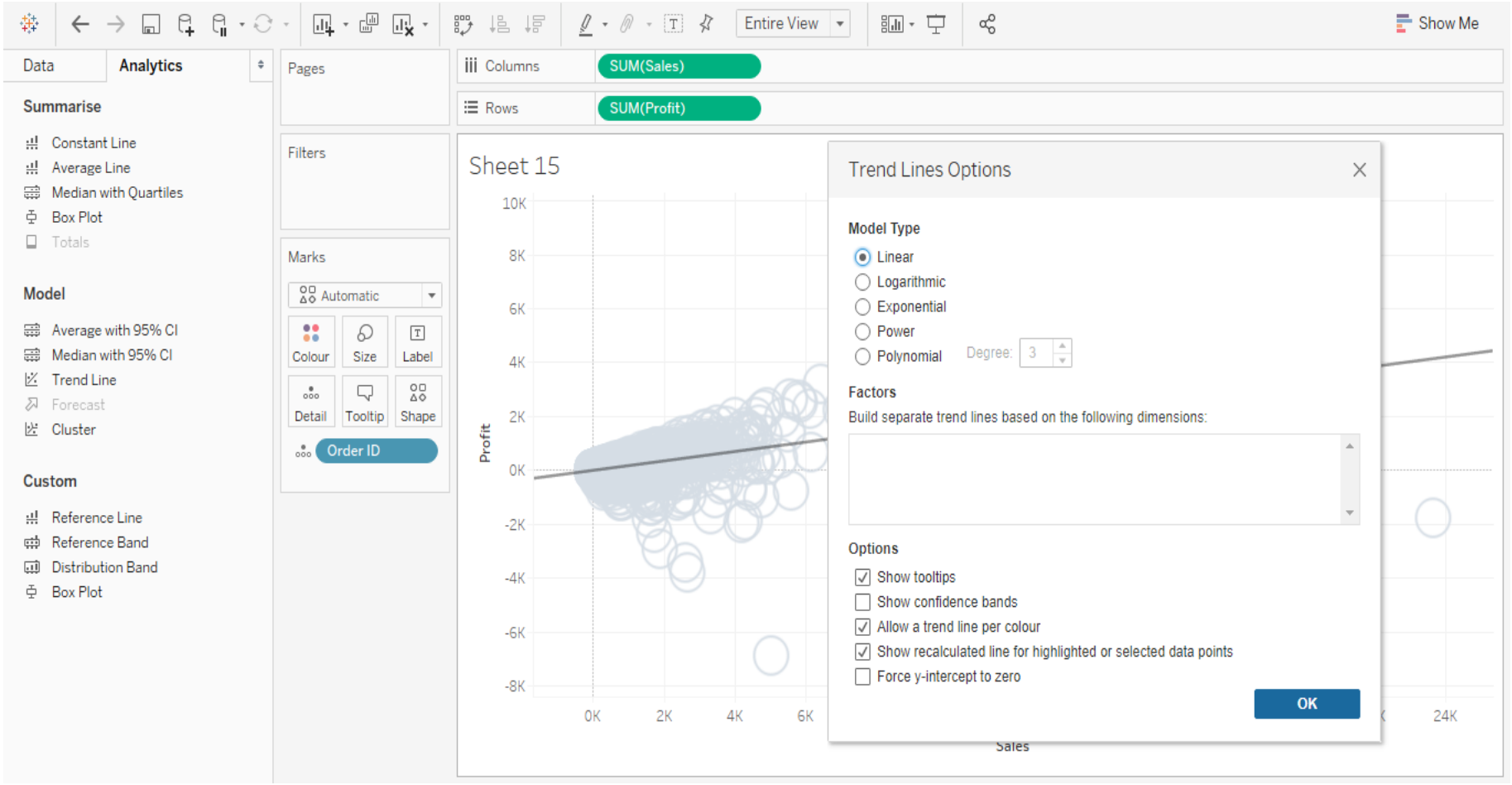
Tableau has a total of five types of trend lines:

- Linear
- Exponential
- Logarithmic
- Polynomial
- Power



Trend Lines

A trend line displaying the relationship between profit & sales



Clustering

Clustering means dividing a data set into segments or clusters having relevant data values. Clustering helps us conduct a comparative analysis of data in Tableau. A cluster contains similar data values of a dimension that is the values in a cluster are more related to each other than the data in other clusters.

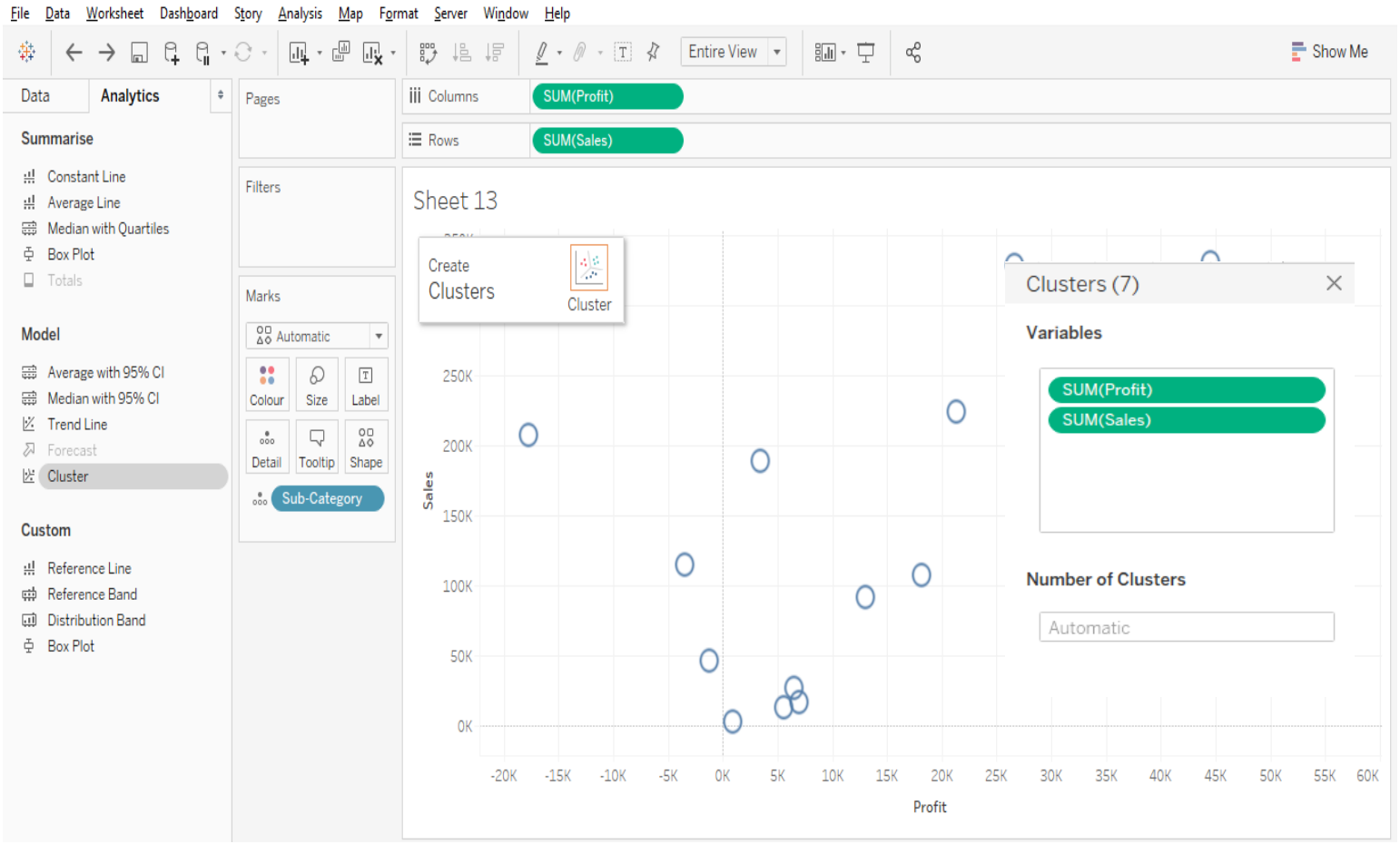
Clustering allows you to statistically group similar dimension members

In Tableau clustering is done on the basis of K-means clustering algorithm.

To Create a cluster you just need to drag the cluster from Analytics pane to visualization.

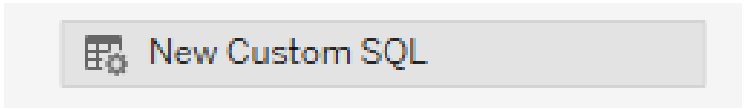
Clustering

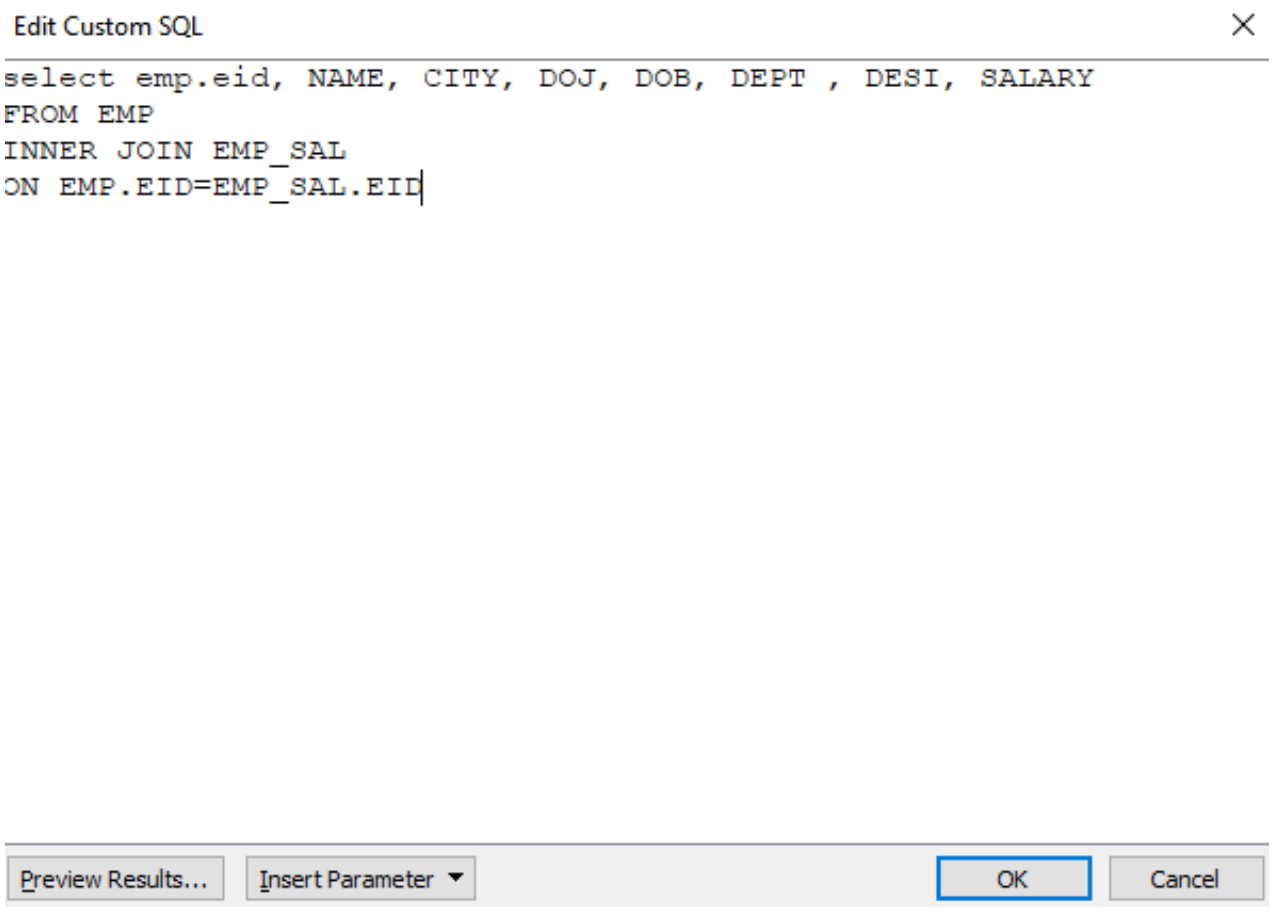
To Create a cluster you just need to drag the cluster from Analytics pane to visualization.



Connect using SQL Queries

Using SQL queries we can connect to you can connect to a specific query rather than the entire data set





Parameterized SQL Queries

In addition to simple Queries we can make a dynamic query using parameters

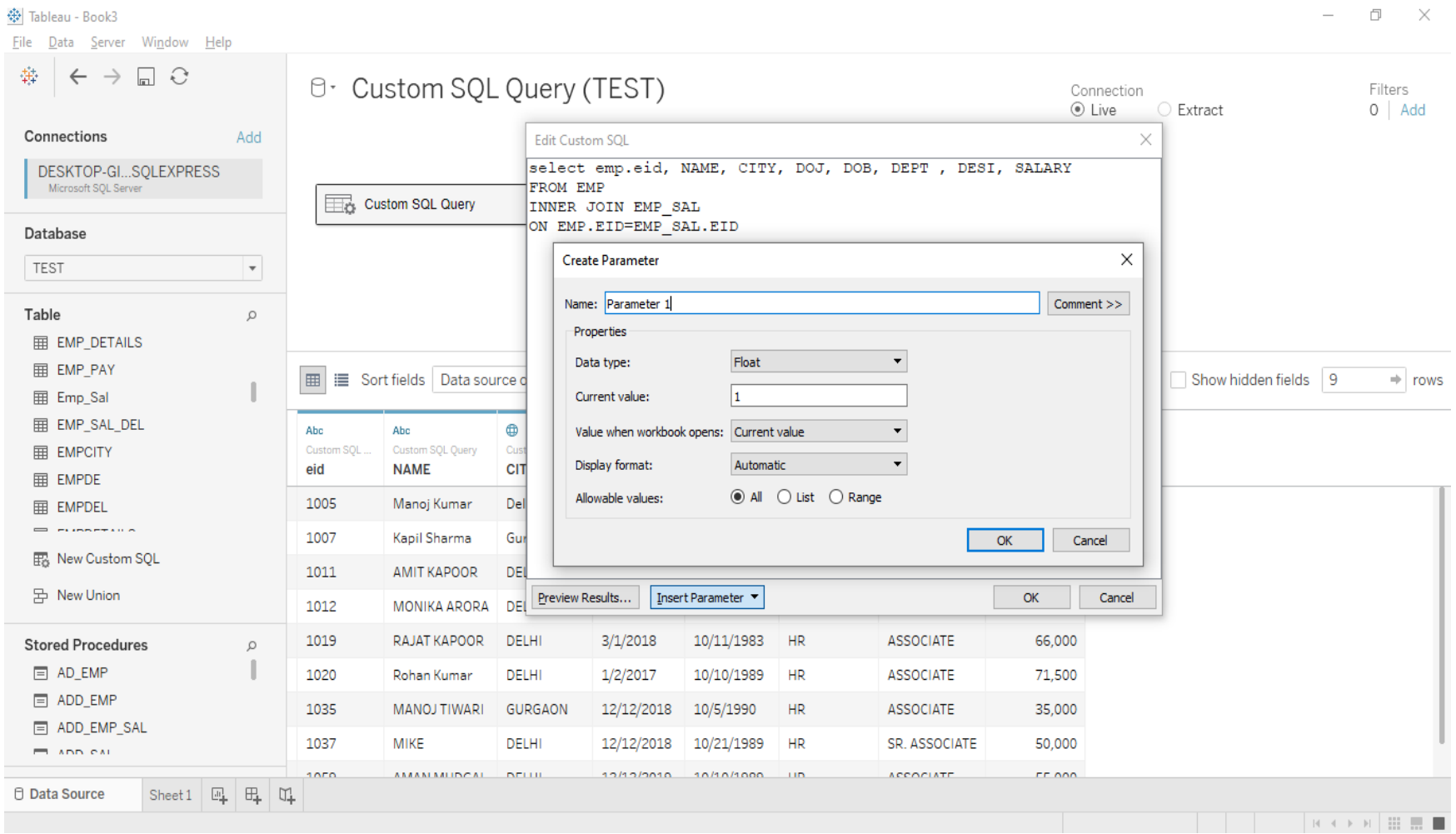
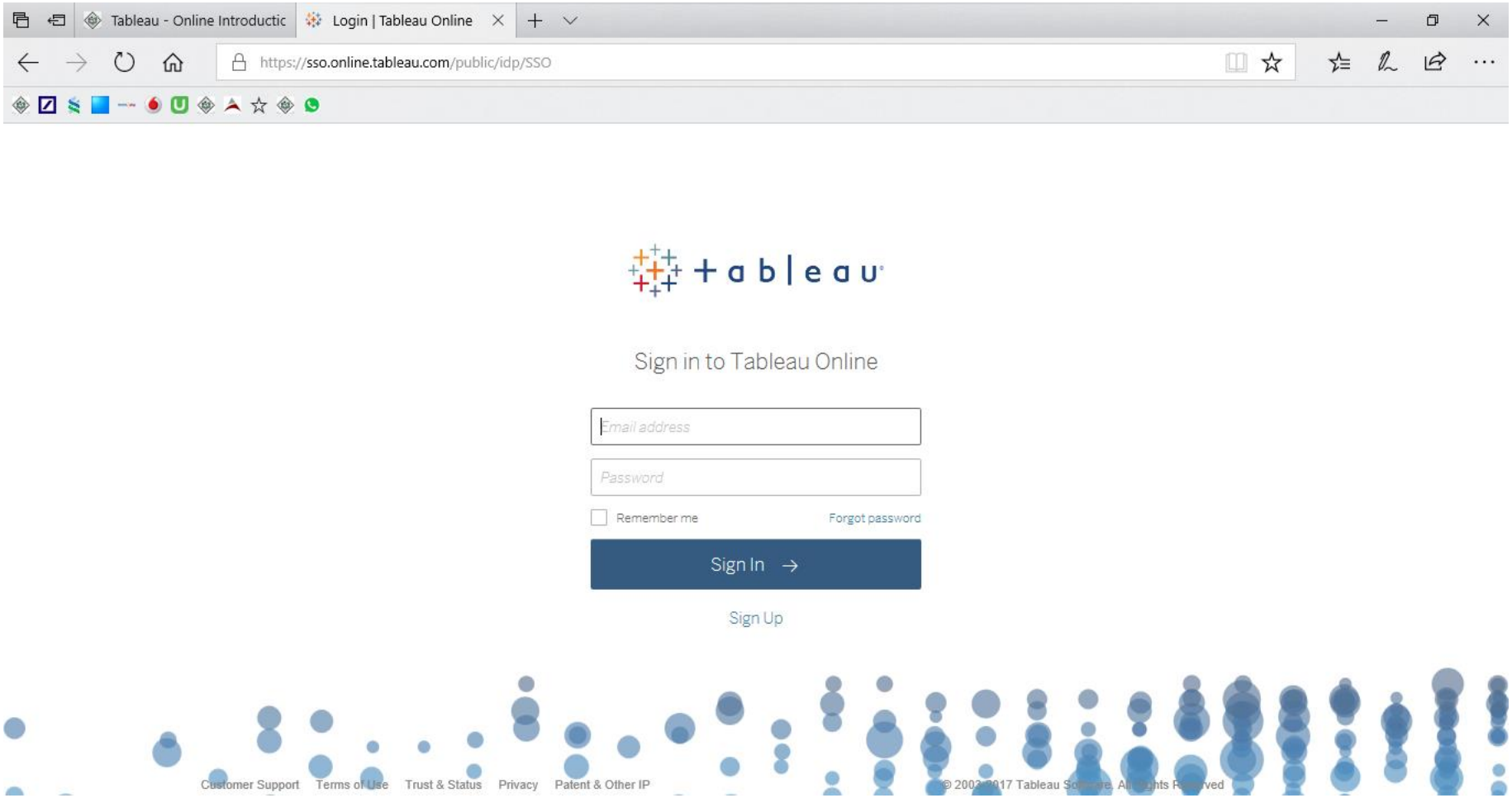


Tableau Online

Tableau online is a platform to share our report / analysis with different people.



Projects , Workbooks, Views, Data Sources

Users, Groups, Status, Settings

Tableau Online

Tableau online is a platform to share our report / analysis with different people.

User Site Roles :

- Site Administrator Creator – Full Control
- Creator - Full Control Can not change permissions
- Site Administrator Explorer – Cant connect to external data
- Explorer (can publish) Can publish however, can not connect to external data and create new data sources
- Explorer – cant save the work
- Viewer – read only access can download
- Unlicensed – not allowed to publish any thing

Publishing

Publishing the projects on to Tableau online. What we have created on Tableau desktop we need to publish it on Tableau Online.

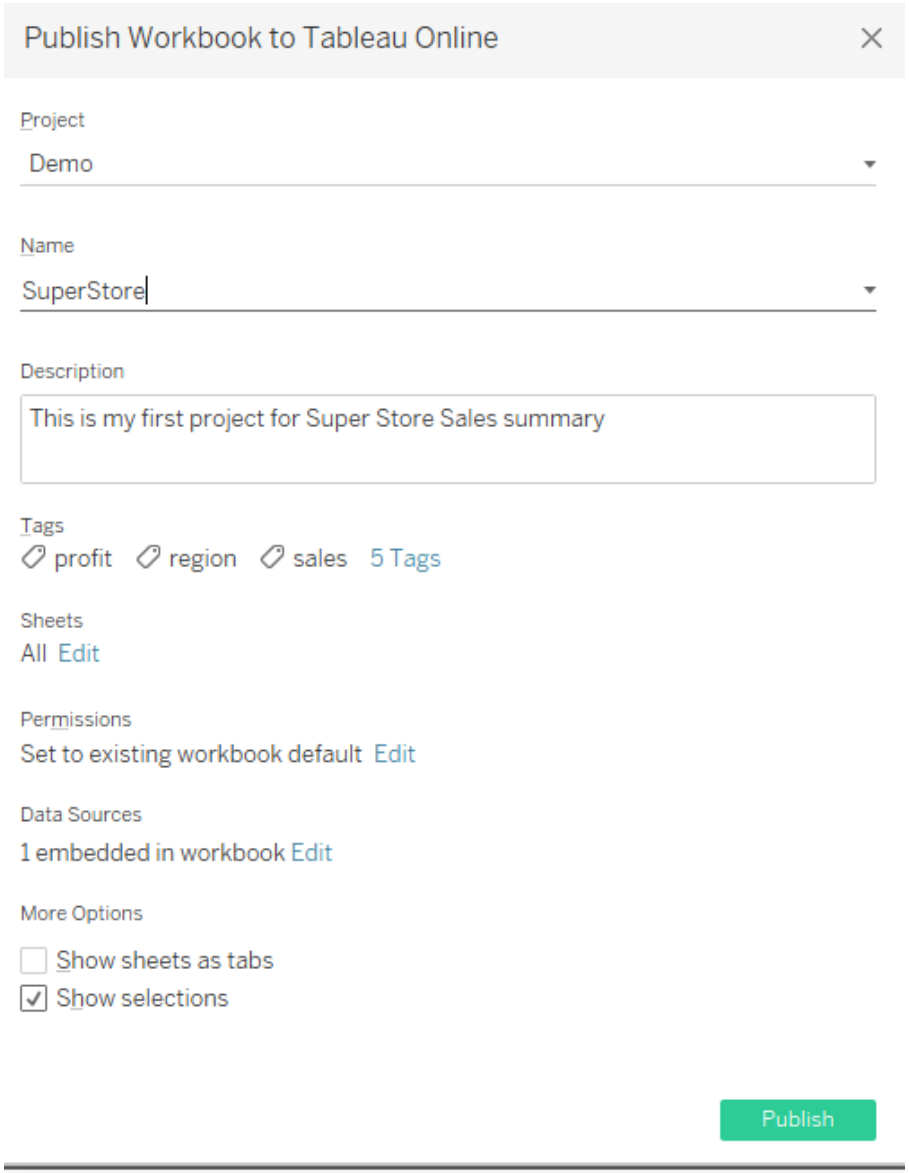
Tableau - > Server -> SignIn

After login to tableau Online click on publish Workbook.

Publishing

In the popup box provide the below information:

- Project : Name of the Project in Tableau Online in which the workbook needs to be published.
- Name : Name of the Work Book to be displayed in Online
- Description : Short description about the project.
- Sheets: Specify the sheets to be published.
- Tags: Specify the key words that can be used to search the respective workbook
- Permissions : Set the permissions for the workbook.
- Data Source s: Specify how to publish the dashboard as a part of workbook / separately.
- Show Sheets as tabs – Display sheets tabs on Tableau Online
- Show Selections – Only selected sheet will be displayed



Thanks!

EVERY **ENDING**
IS REALLY JUST A
NEW BEGINNING

Rajeev Garg
Data Analytics Trainer
9899245970