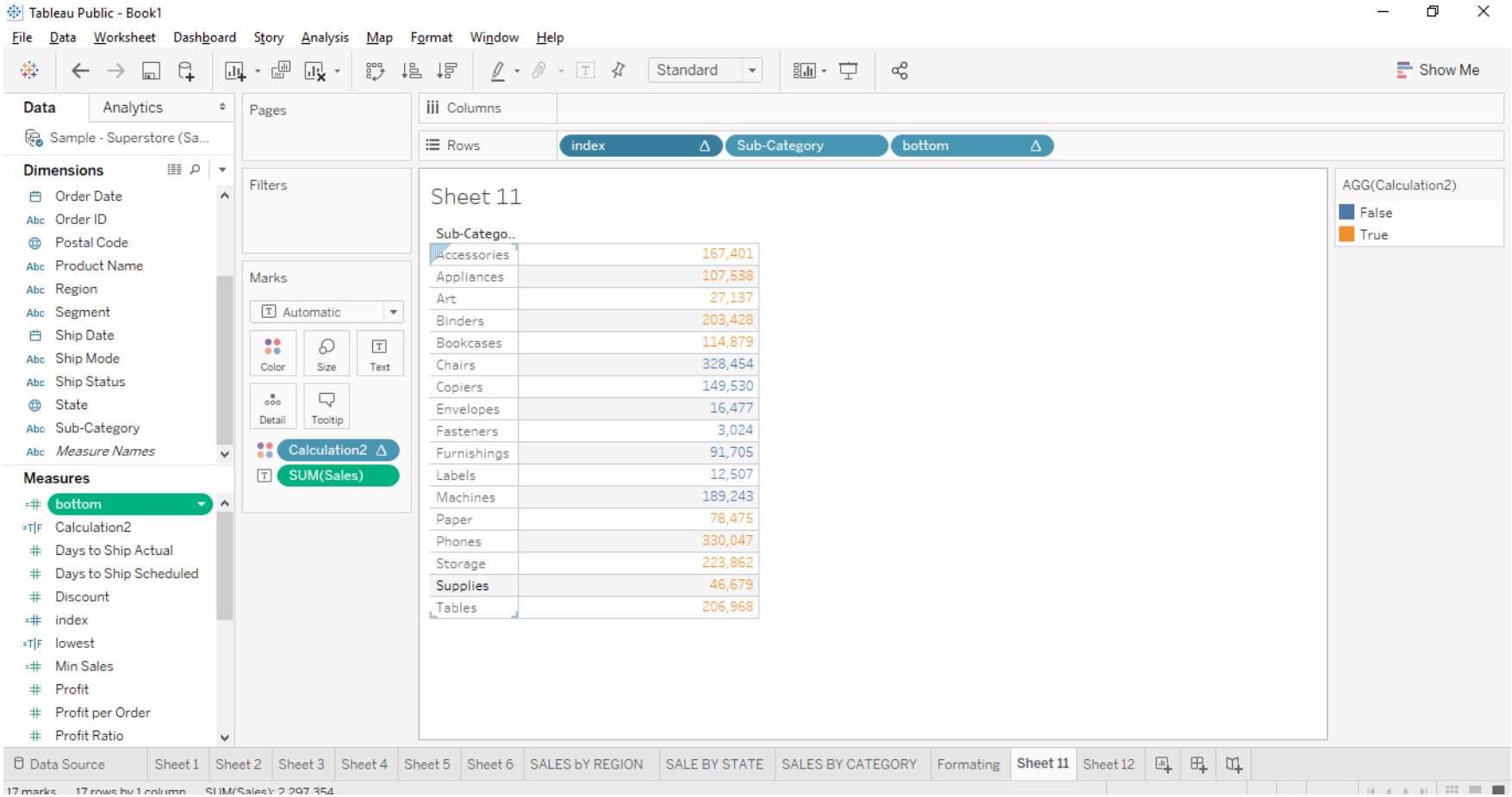
Calculations

Conditional Formatting : Formatting the data as per some condition.

For Eg: Highlighting the top 5 or bottom 5 sales.



NOTE: We need index & last function to implement conditional formatting.

Tableau Public - Book1

File Data Worksheet Dashboard Story Analysis Map Format Window Help

Standard

Data | Analytics

Clipboard_20180210T07...

Sample - Superstore (Sa...

Dimensions

- Order Date
- Order ID
- Postal Code
- Product Name
- Region
- Segment
- Ship Date
- Ship Mode
- Ship Status
- State
- Sub-Category
- *Measure Names*

Measures

- Days to Ship Actual
- Days to Ship Scheduled
- Discount
- index
- Last
- Profit
- Profit per Order
- Profit Ratio
- ProfitCategory
- Quantity

Pages

Filters

Marks

Automatic

Color | Size | Text | Detail | Tooltip

AGG(ProfitCat..

SUM(Profit)

Columns

Rows: Sub-Category | AGG(ProfitCategory)

IF-ELSE 2

Sub-Catego..	ProfitCateg..	
Copiers	OK	55,618
Phones	OK	44,492
Accessories	OK	41,932
Paper	OK	34,053
Binders	OK	30,200
Chairs	OK	26,586
Storage	OK	21,280
Appliances	OK	18,132
Furnishings	OK	13,070
Envelopes	LowProfit	6,956
Art	LowProfit	6,530
Labels	LowProfit	5,558
Machines	LowProfit	3,387
Fasteners	LowProfit	952
Supplies	LowProfit	-1,187
Bookcases	LowProfit	-3,479
Tables	LowProfit	-17,733

Source | Sheet 1 | Sheet 2 | COMPUTE USING | ComputeUsing2 | conditionalFormatting | Rank | IF-ELSE | IF-ELSE 2

17 rows by 1 column SUM(Profit): 286,347

ASSIGNMENT

1. Display sub category & Region wise profit in the tabular format. Format the worksheet with black background. Font in bright color, no banding in rows/columns. Heading should be highlighted in different color.
2. Display in a form of horizontal bar chart category & subcategory wise total sales & Sales percentage. Percentage should be with respect to Category.
3. Represent year wise profit (running total)
4. Represent subcategory wise profit. Use conditional formatting to highlight top & bottom profit generating subcategory. The number should be dynamic.
5. Display monthly profit in a tabular format. Order date should be interactive. Increase & decrease should be highlighted using arrow.

CHARTS

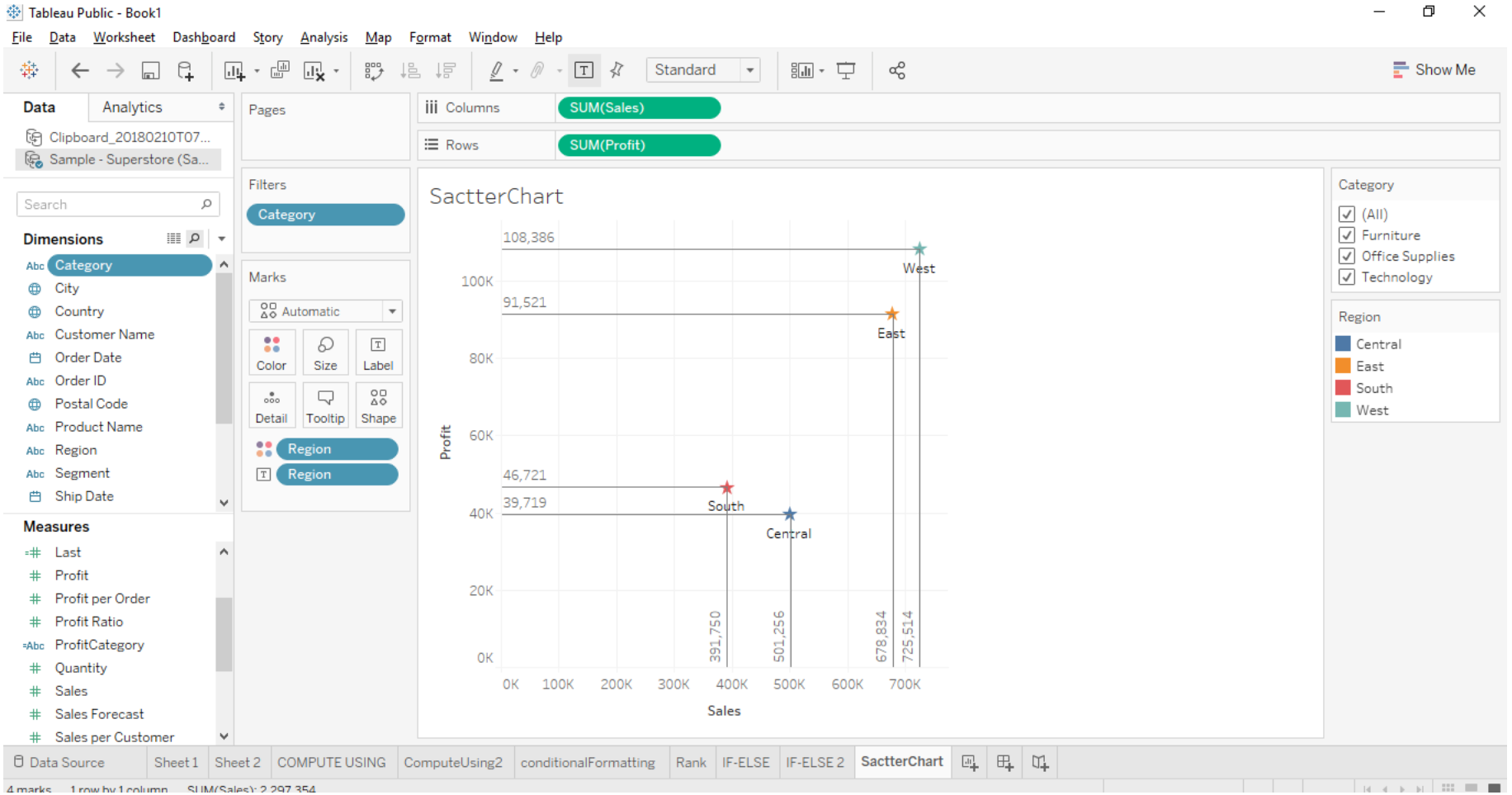
Using Tableau we can create 24 different type of charts. Tableau gives us the best suited chart as per the dimensions and measures selected by us using Visualization Query Language.

If we select Dimension First and Measure second we will get a text.

If we select Measure first and Dimension second we will get a graph.

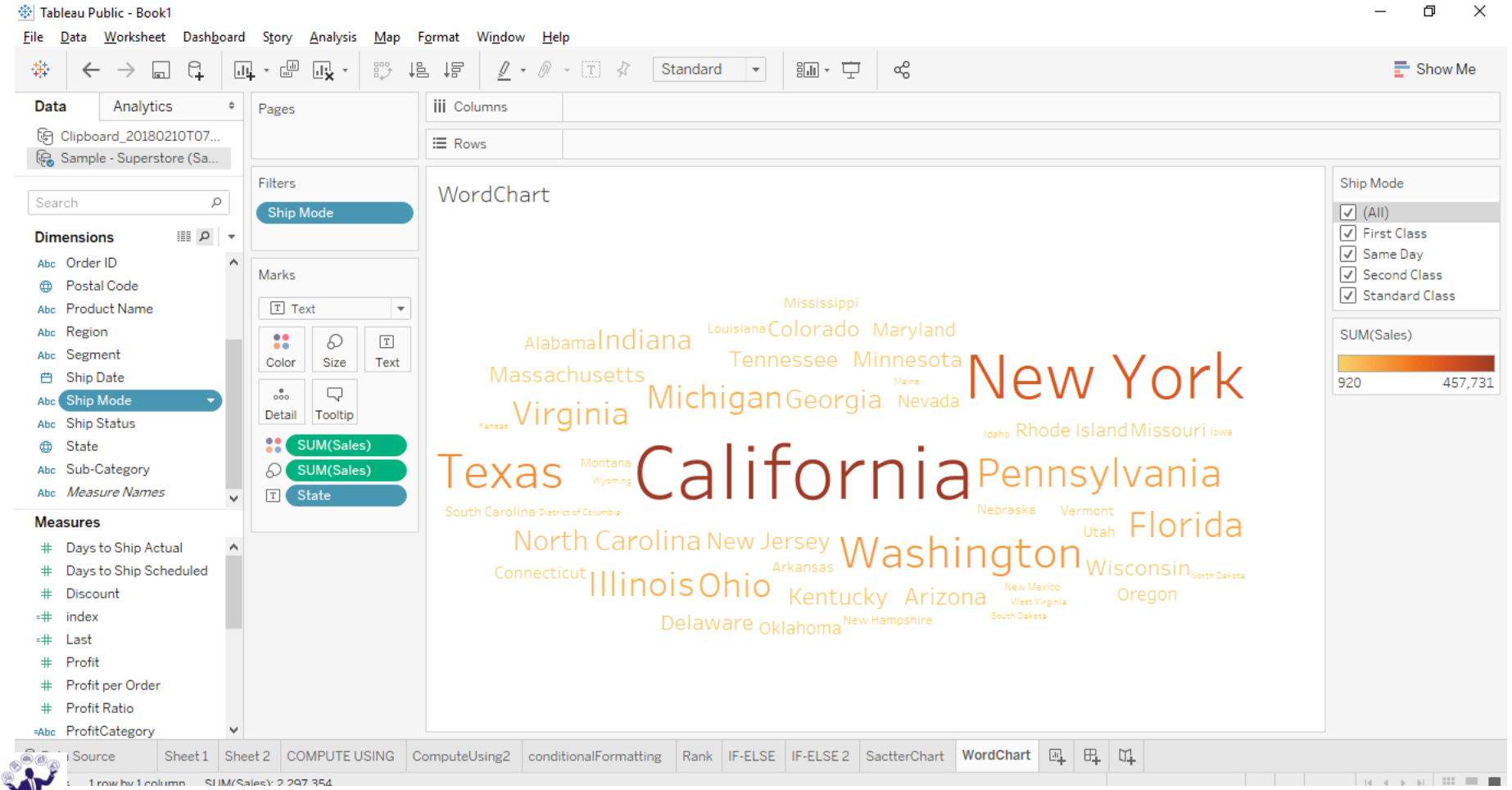
CHARTS

Scatter Charts: In scatter chart we get few points scattered on the plot area.



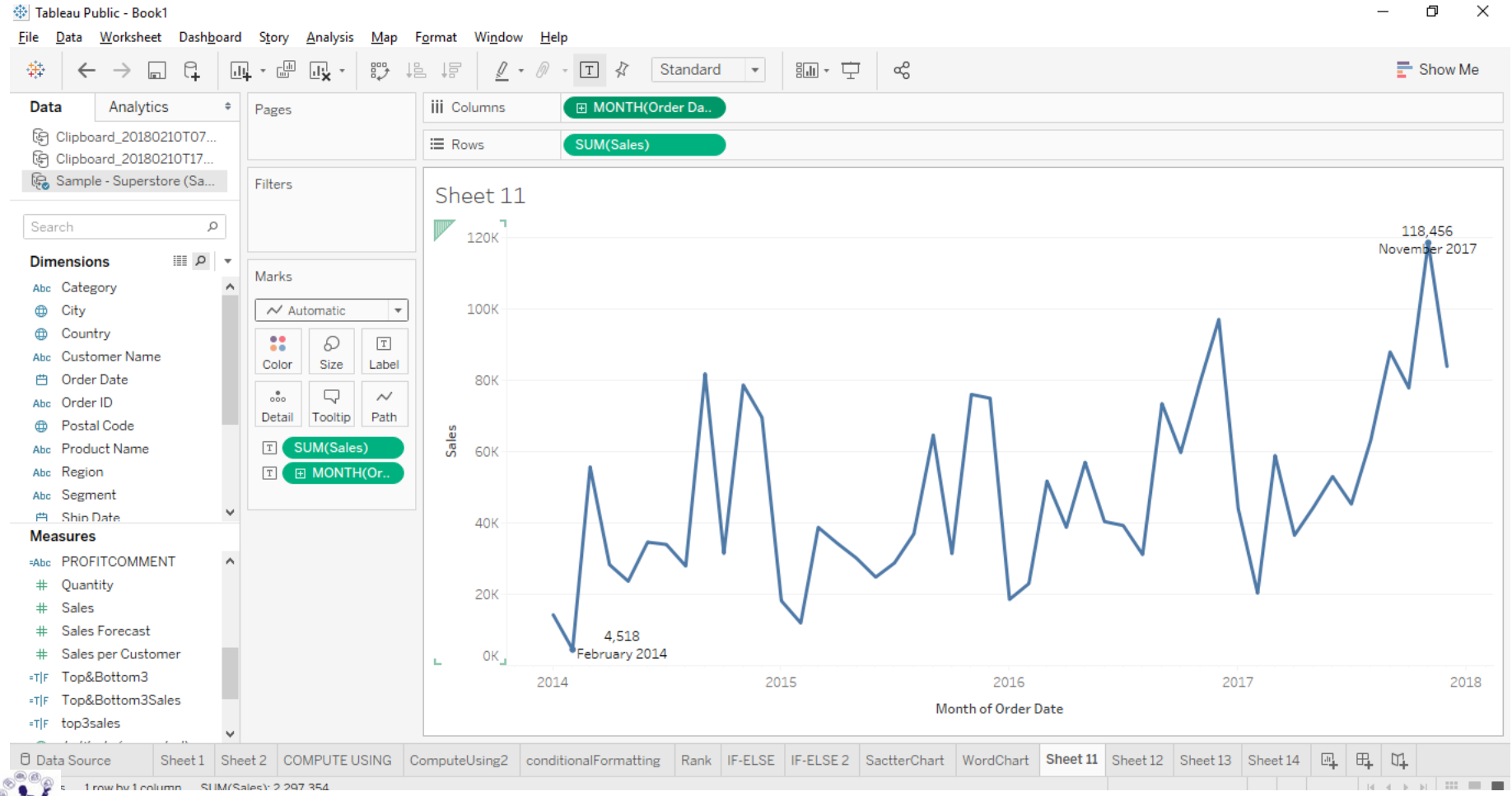
CHARTS

Word Maps: Dimension is displayed in different colors & size as per the measure value.



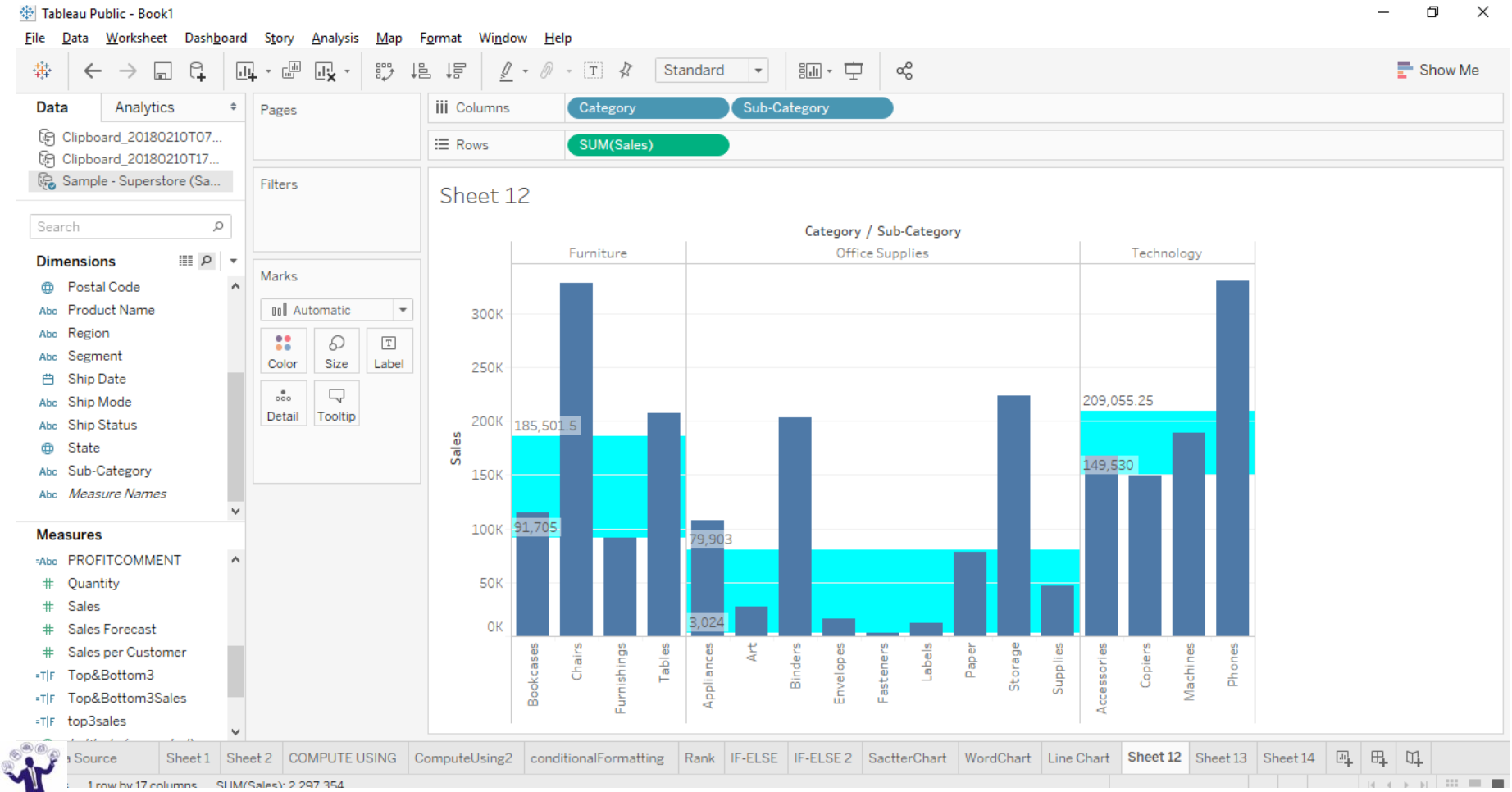
CHARTS

Line Chart: Tableau automatically gives a line chart when we are working with date field. A line chart can be continuous (Green) or discreet (Blue).



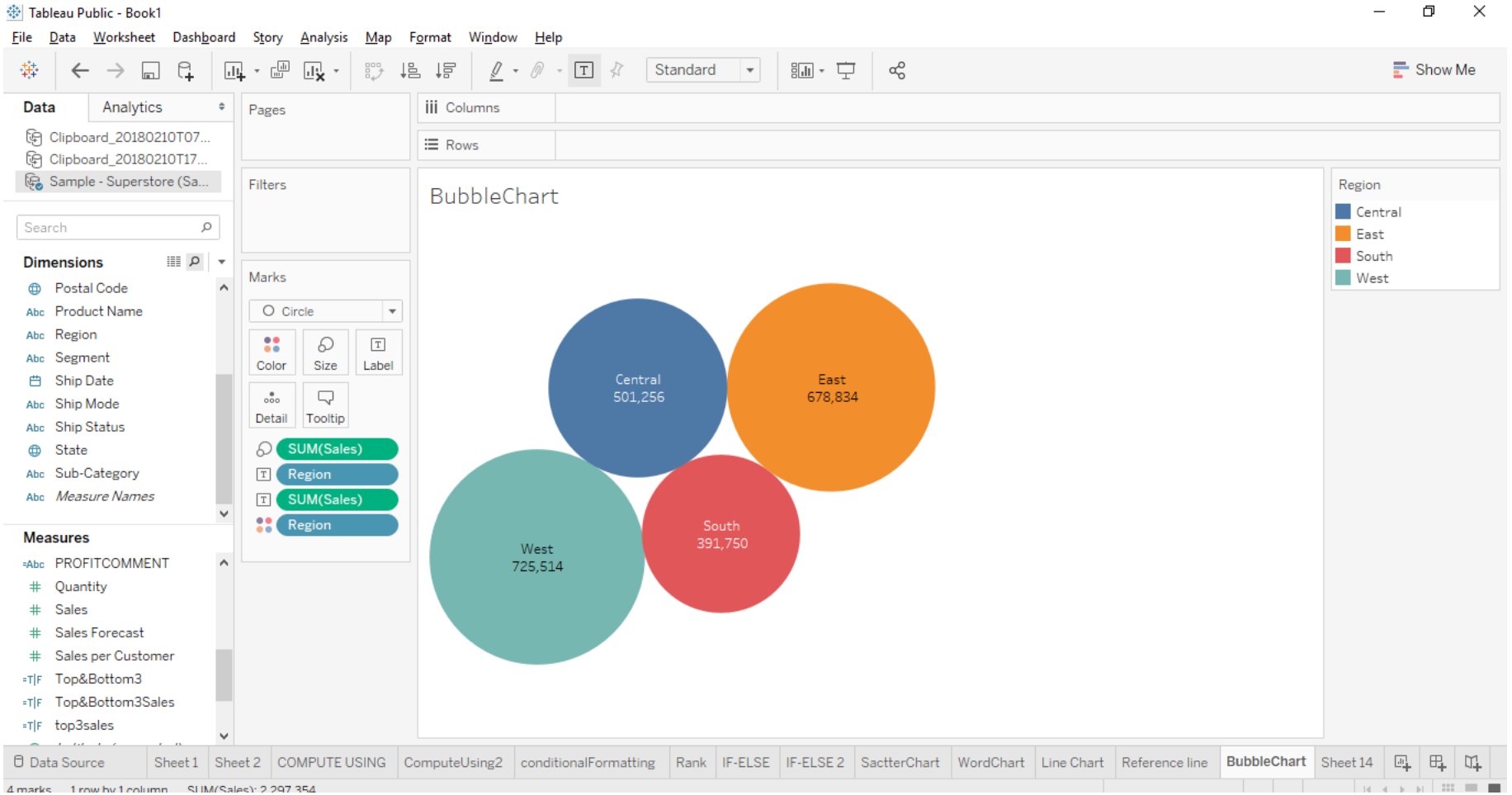
CHARTS

Reference Lines: These are used to indentify / highlight the values with respect to a certain level. Eg: If we need to identify the below average and above average sales. To add a reference line right click on X axis and click on add reference line.



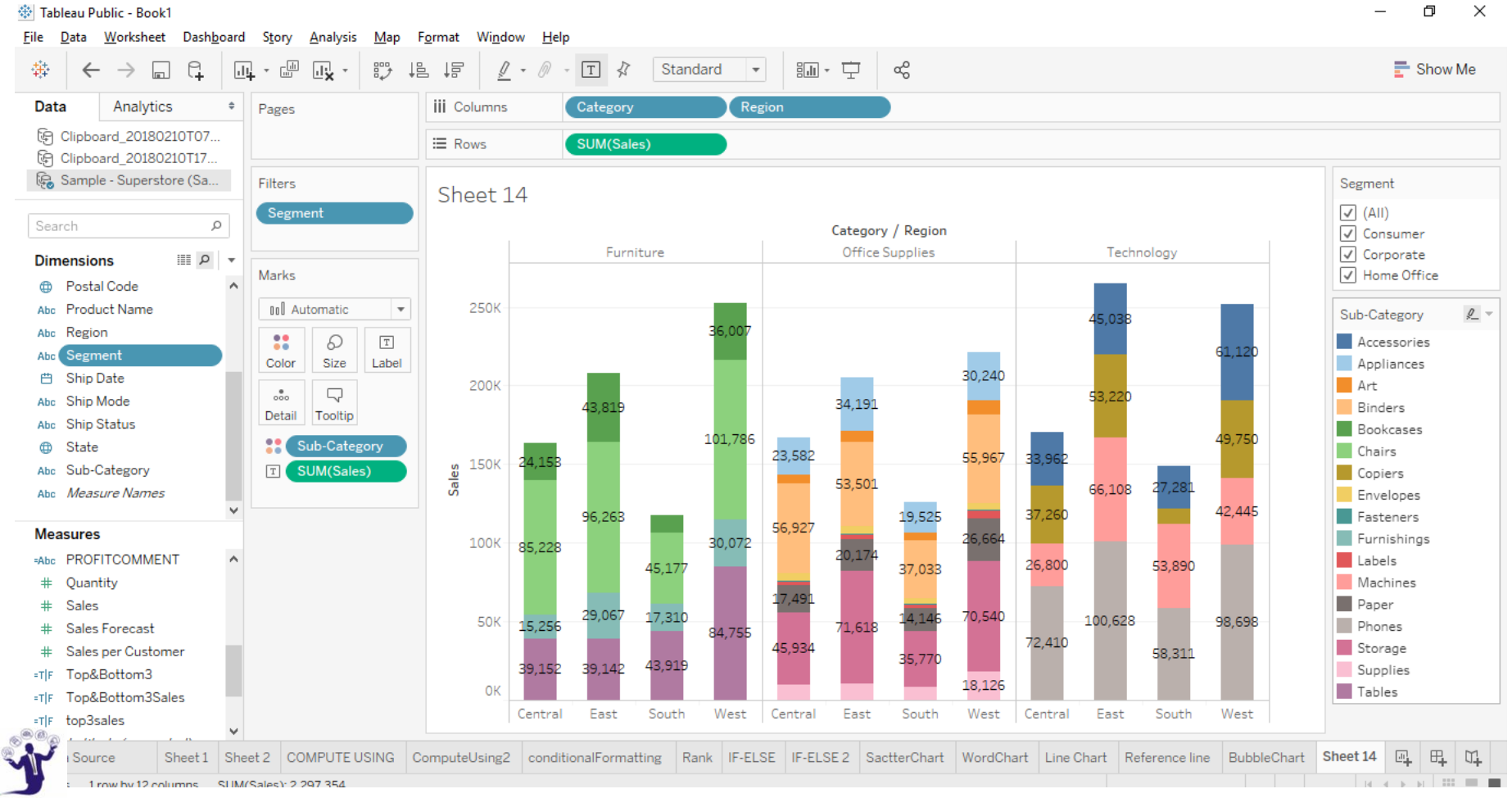
CHARTS

Bubble Chart: Circle represent dimensions & Size represents measures.



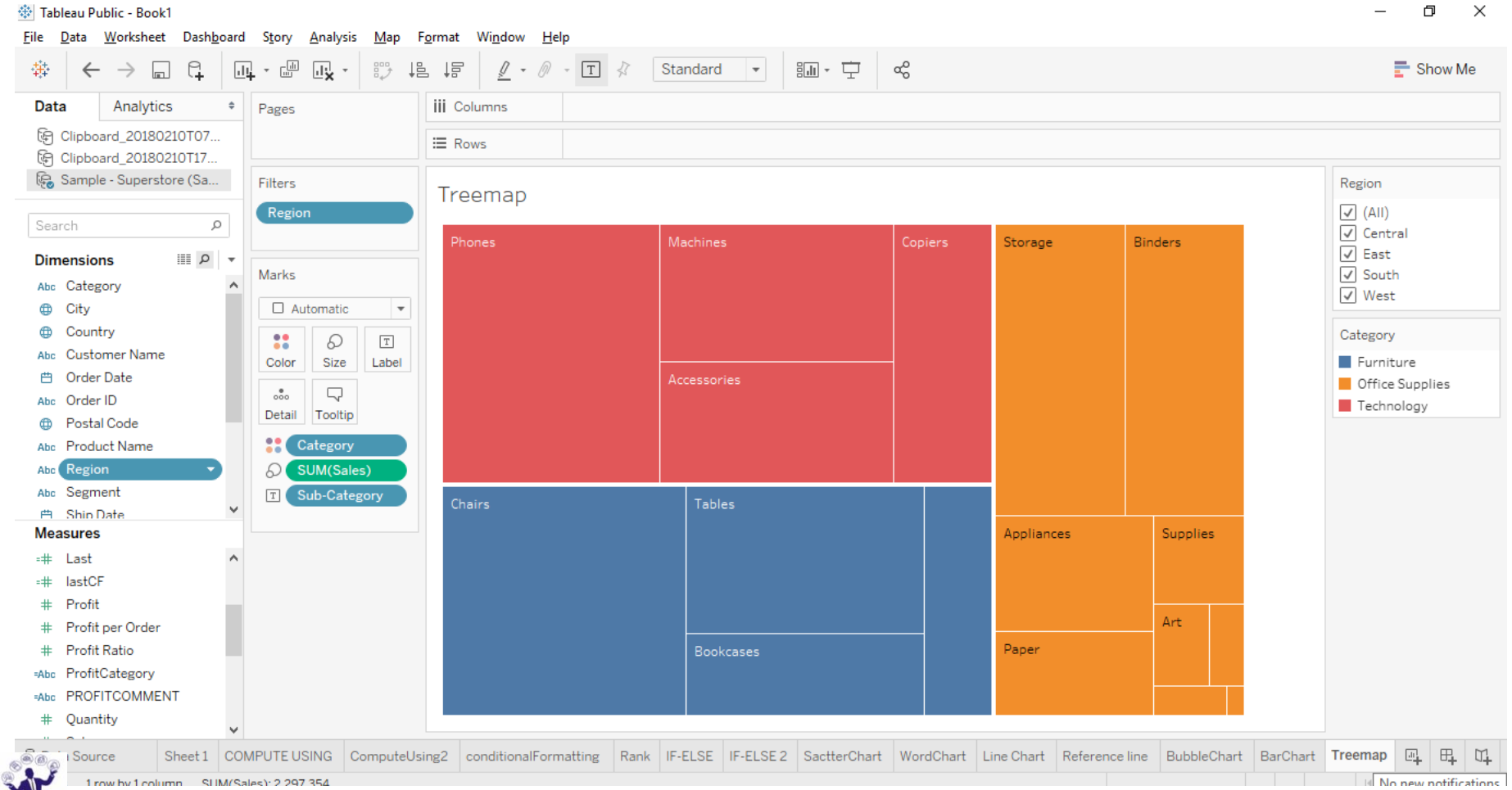
CHARTS

Bar Chart: Bar chart could be Stacked Bar Chart, Colored Bar Chart, Level Bar Chart & Interactive Bar Chart. If we put Dimensions in colors we will get stacked bar chart. If we put Measures in the colors we will get Colored Bar Chart.



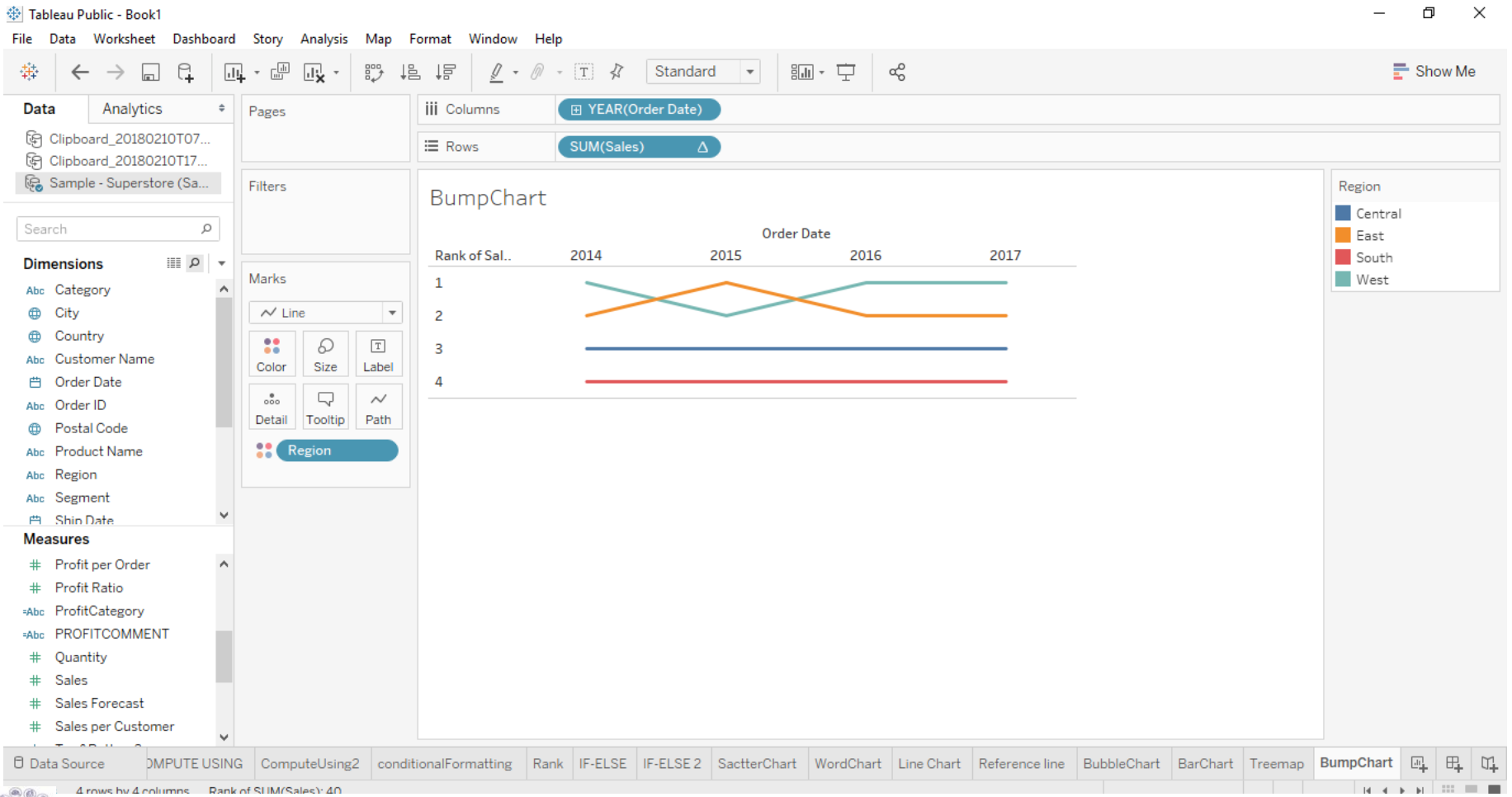
CHARTS

Tree Maps: This chart displays the data in a form of boxes / rectangles of various size.



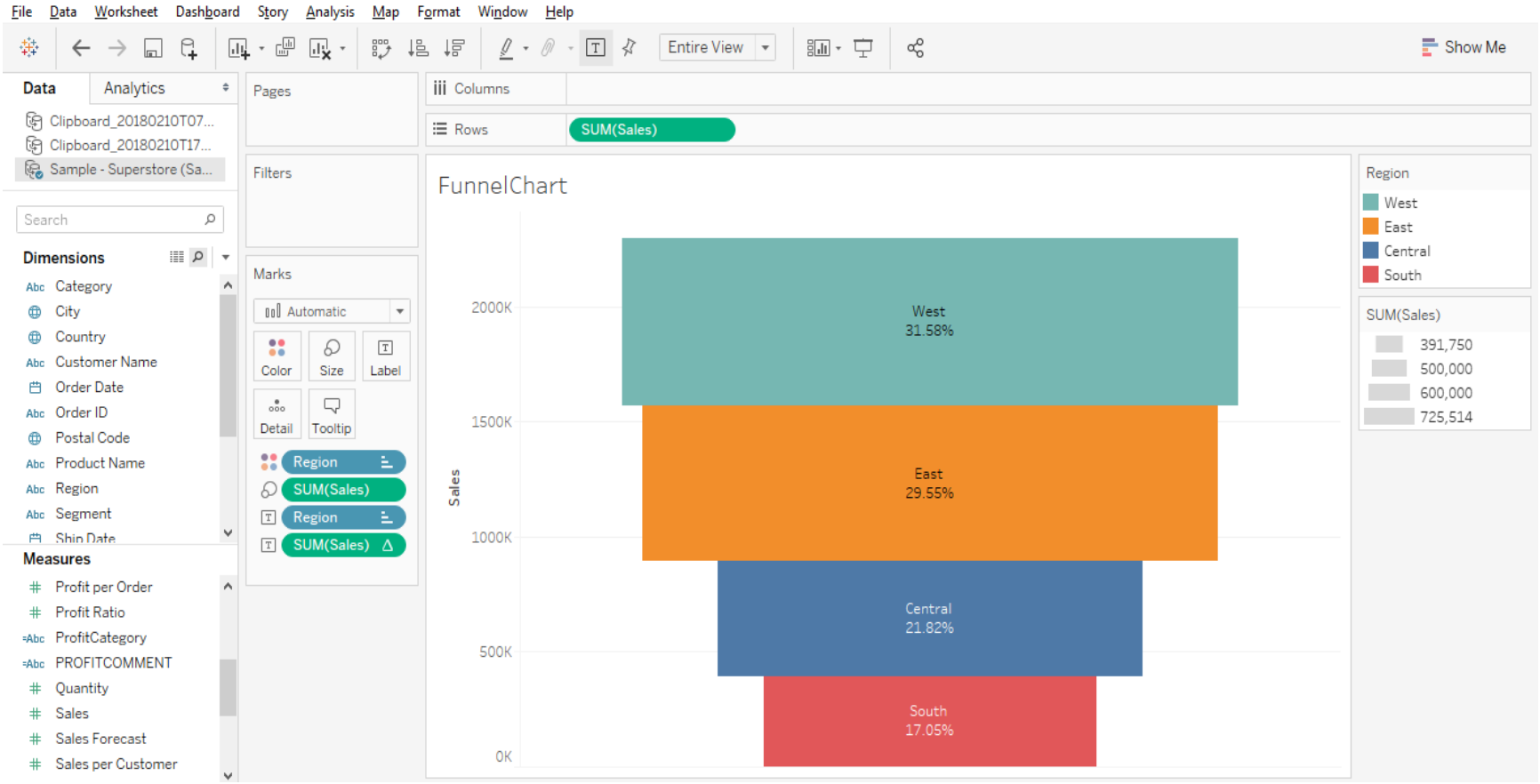
CHARTS

Bump Chart: It is the line chart where the rank changes with time.



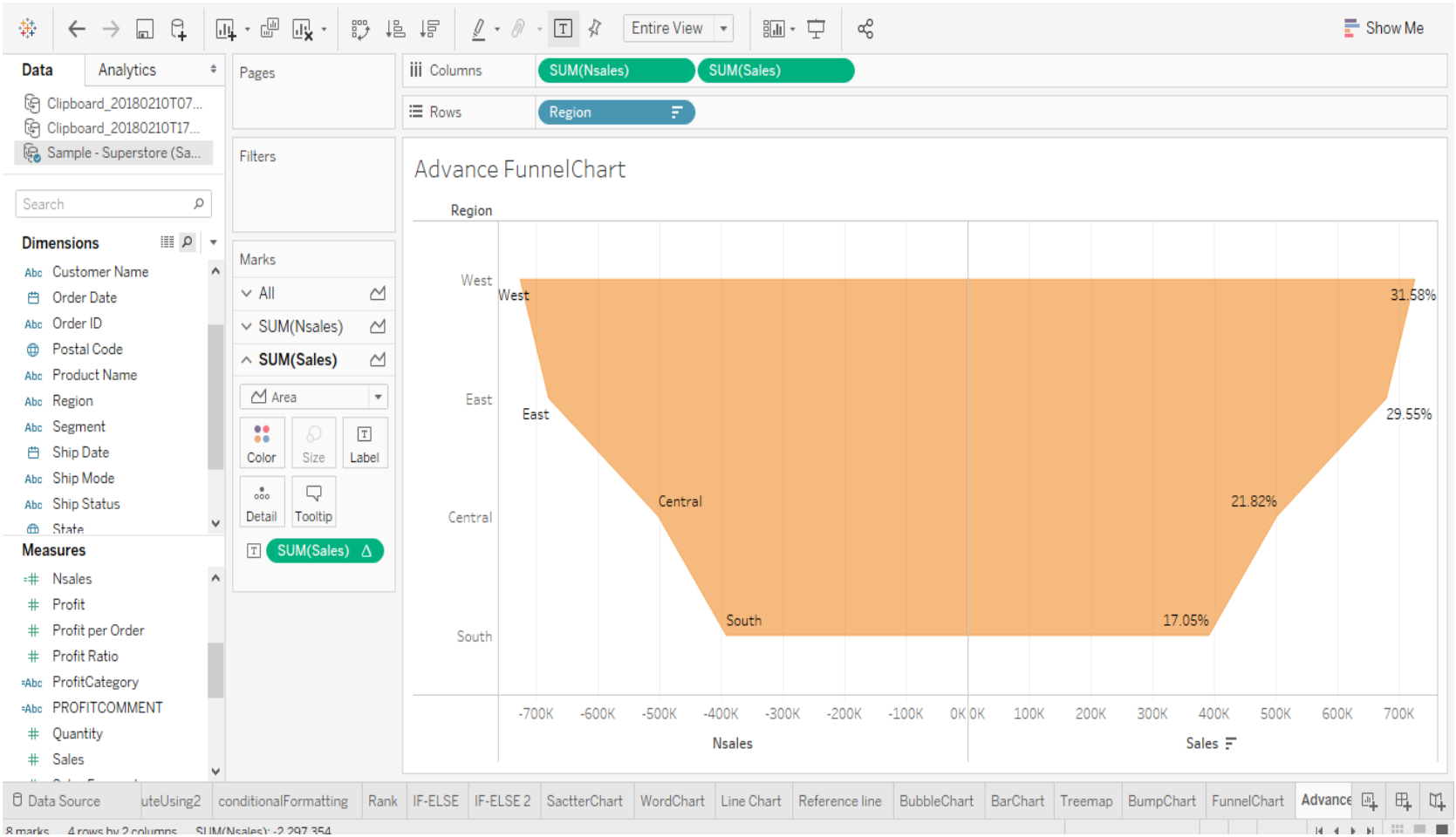
CHARTS

Funnel Chart: It is used to display a measure at different levels / sectors.



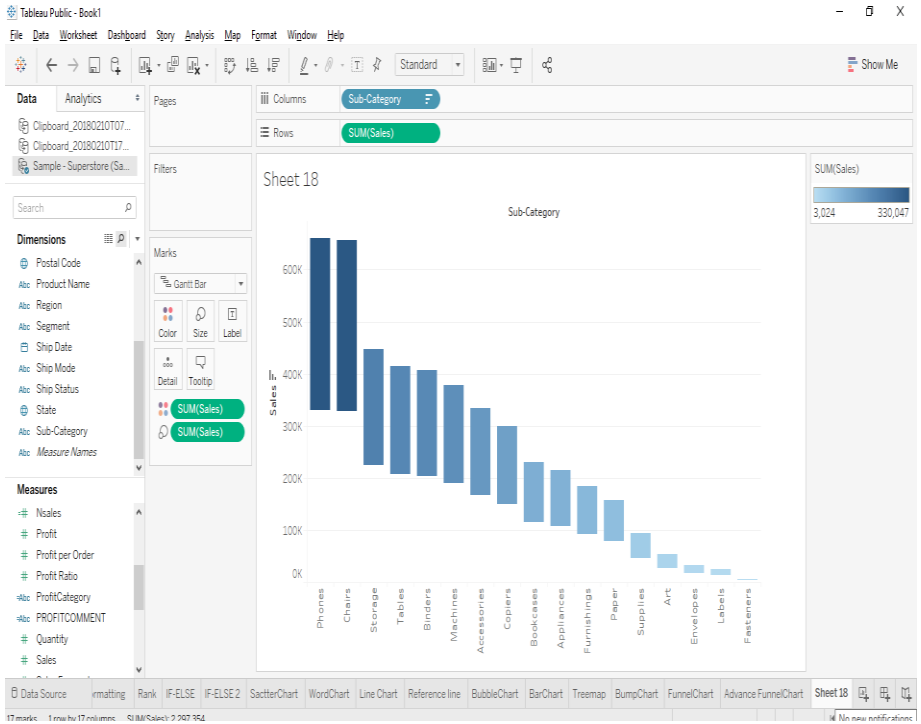
CHARTS

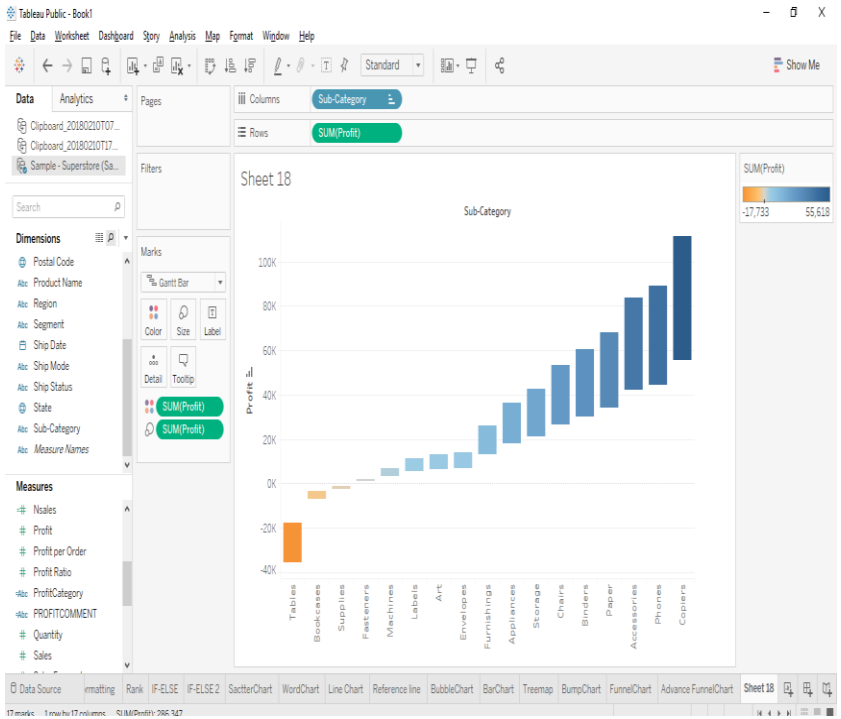
Advanced Funnel Chart: It is used to display a measure at different levels / sectors.



CHARTS - WATERFALL

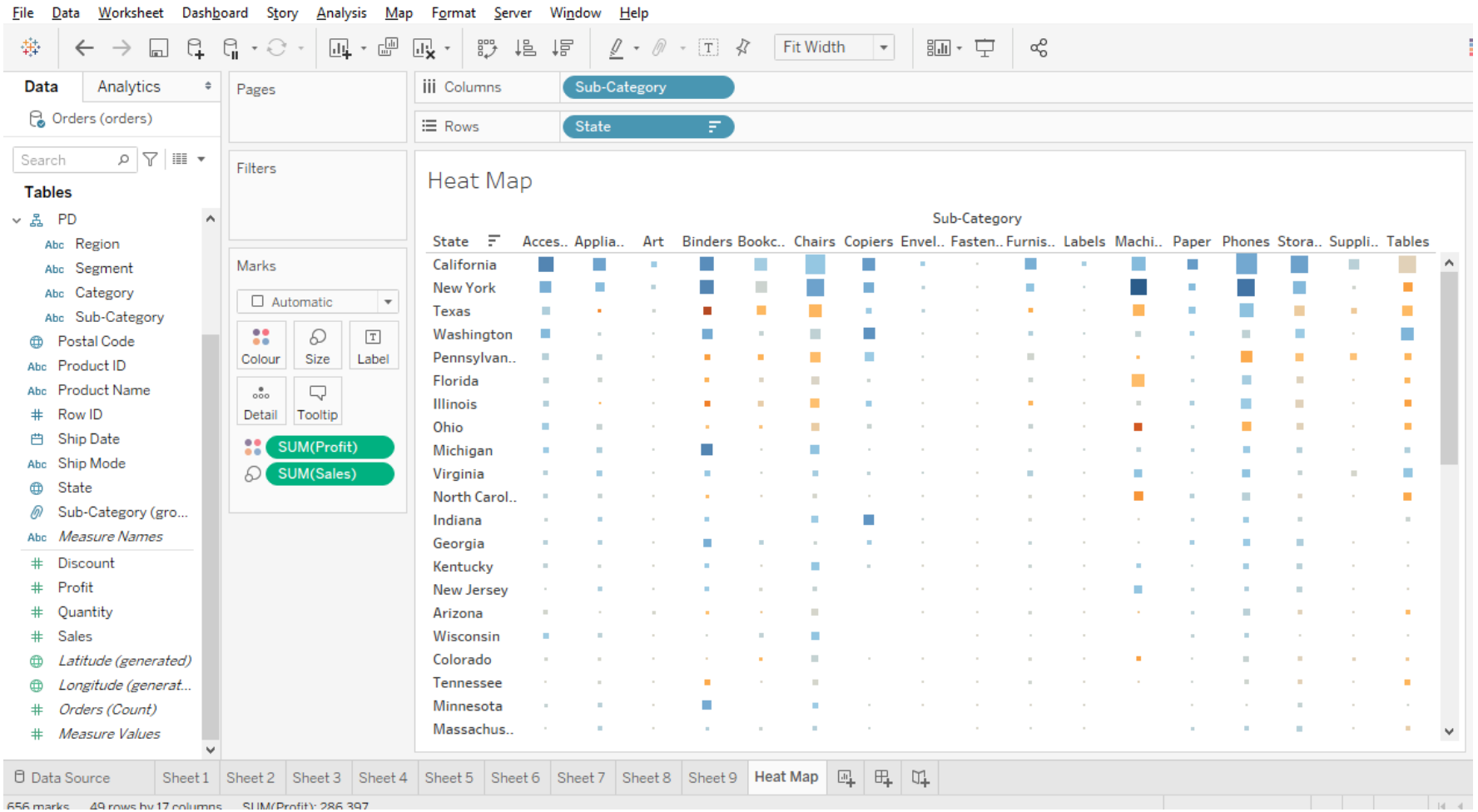
Waterfall Chart: These effectively display the cumulative effect of sequential positive and negative values, thus giving a view of water fall.
To create this chart we use Gantt Bar chart.





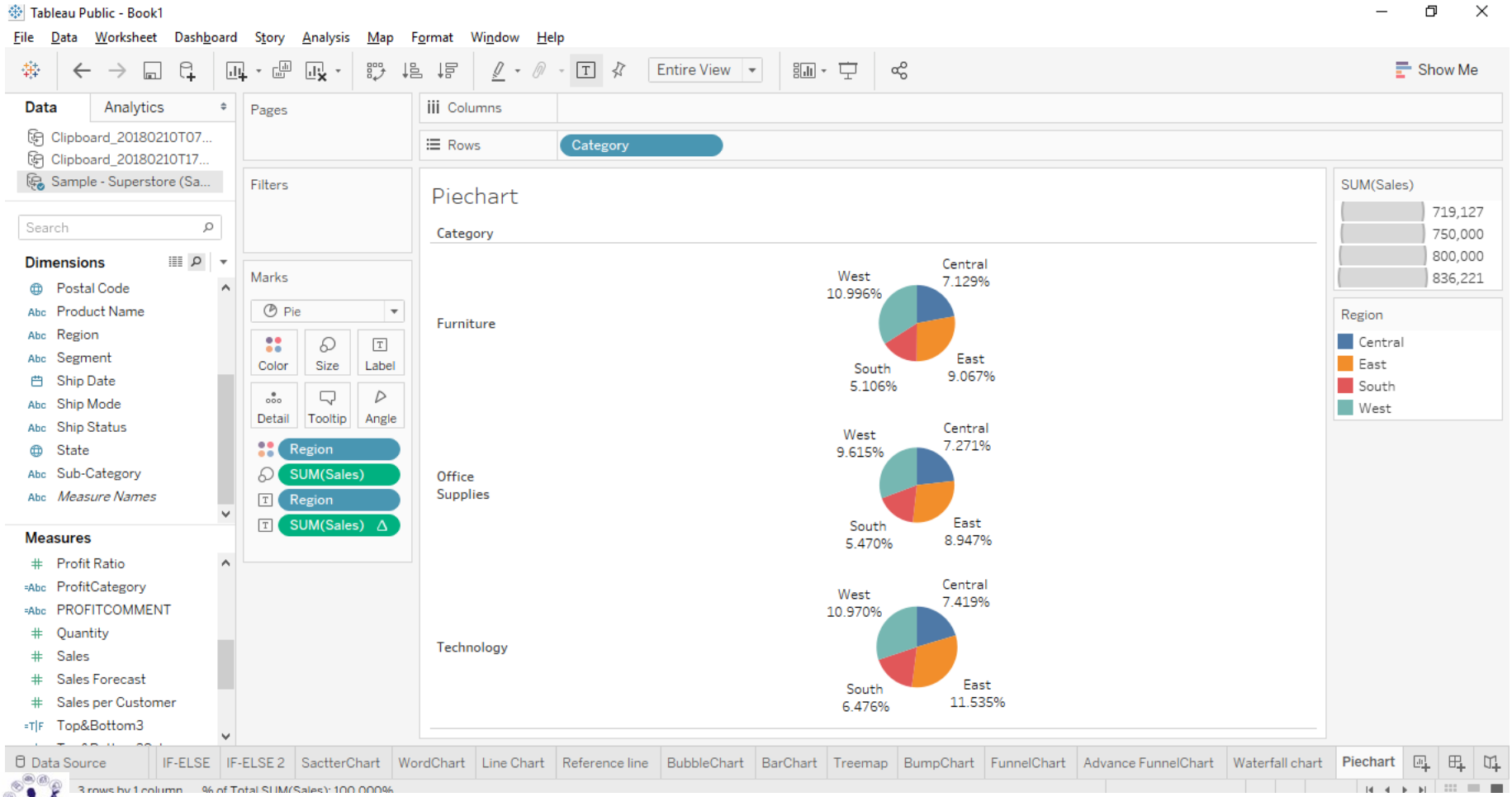
CHARTS - Heat Map

Heat Map is Used to display the data along with color. It will help to compare the data by their color.



CHARTS - PIE CHART

Pie Chart: Comparatively displays the measure value.

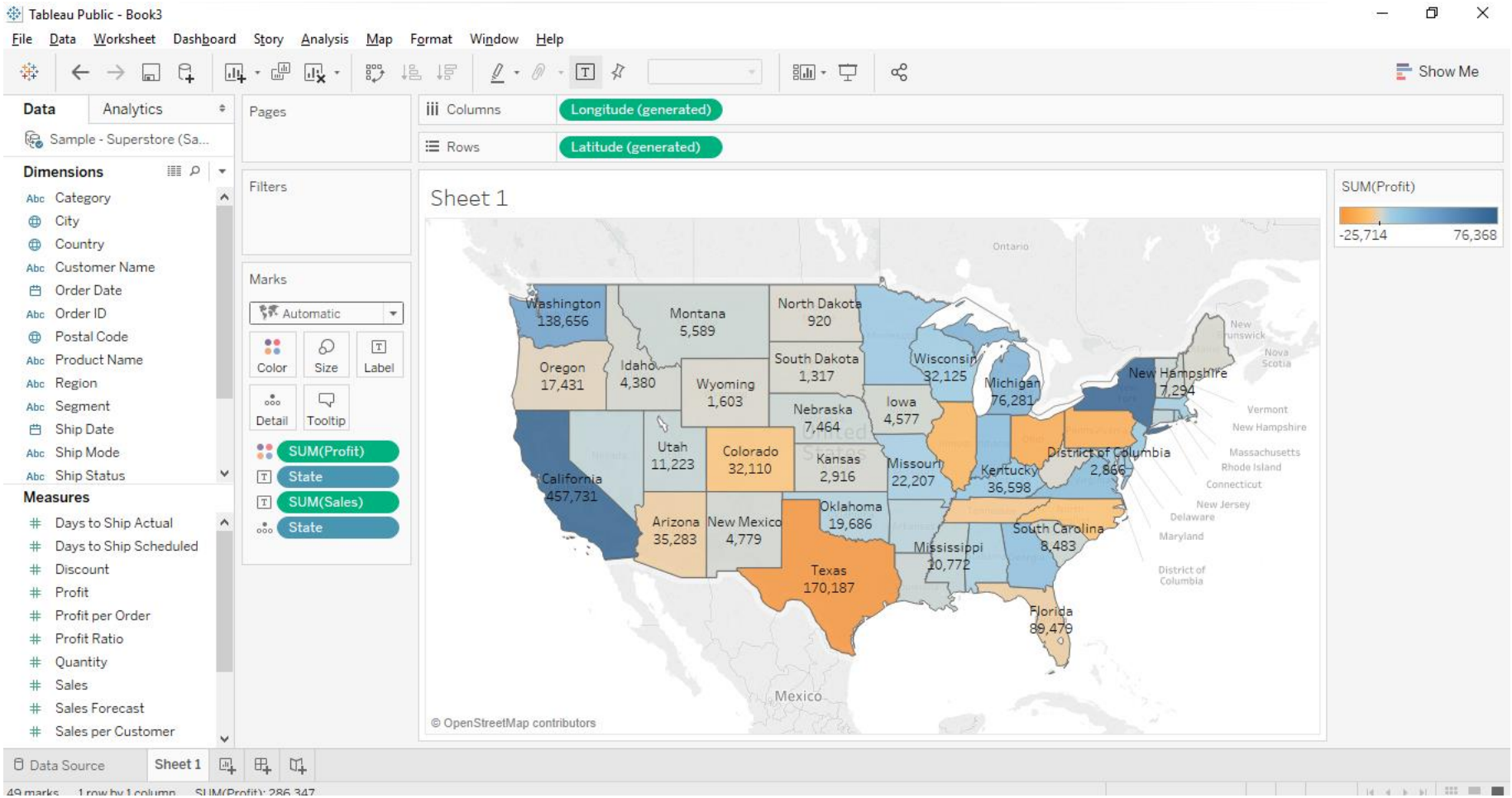


ASSIGNMENT

1. Create a Scatter chart to represent profit & sales for each segment.
2. Represent State wise sales using Word map.
3. Use a line graph to represent monthly Profit, Min & Max profit along with the month should be displayed.
4. Represent profit using a Bar chart category & Subcategory wise, focus should be on subcategories following above average (reference line).
5. Represent Region wise Sales & Profit using Bubble Chart
6. Tree map to represent Category, Segment, Region wise Sales
7. Adv Funnel to represent subcategory Sales
8. Represent segment wise profit using Pie Chart
9. Represent Subcategory wise profit using water fall chart

MAPS

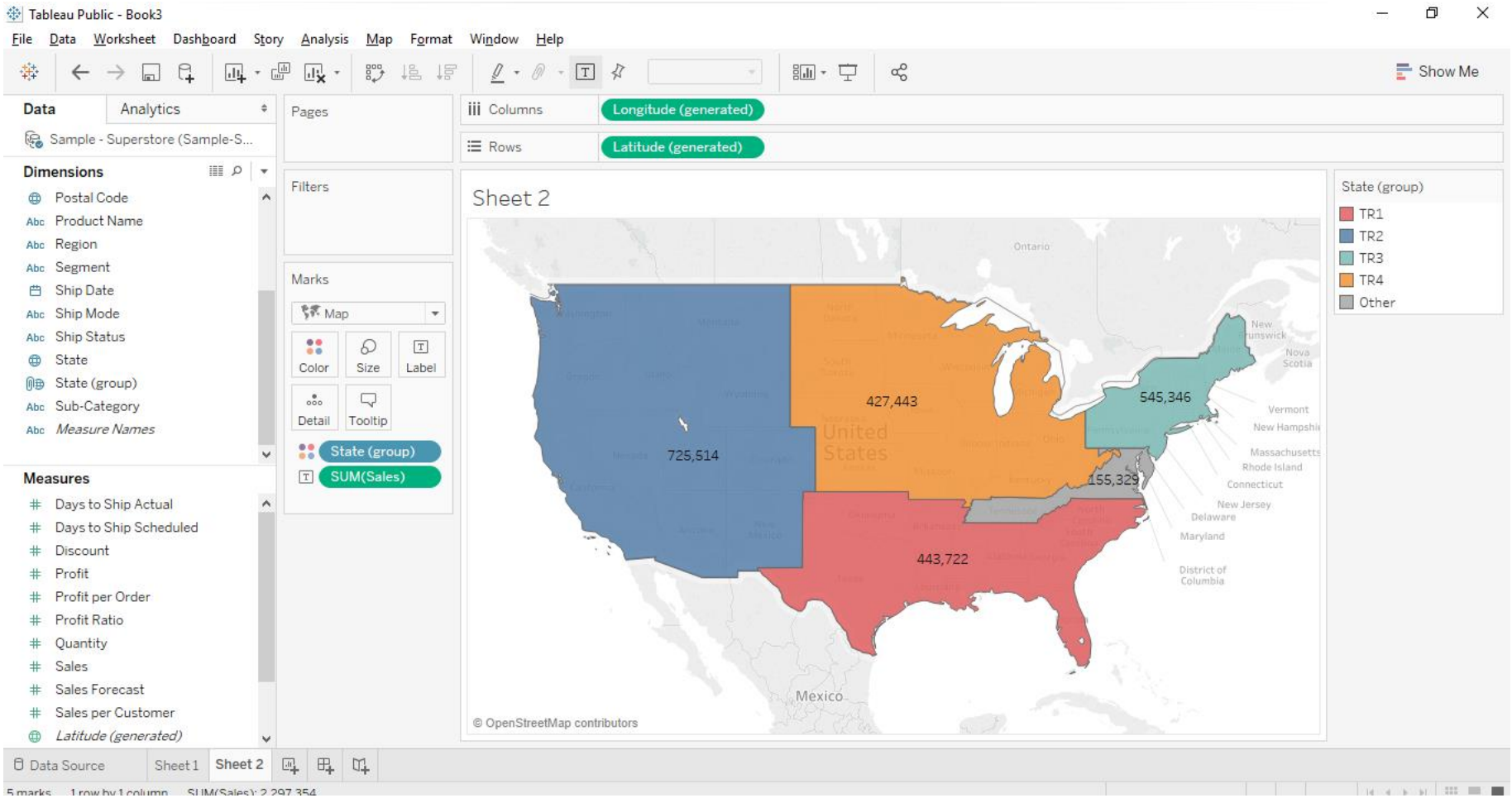
MAPS: To represent the data geographically we create a Map chart.



We can manipulate the maps using map options, map layers, Custom Territories

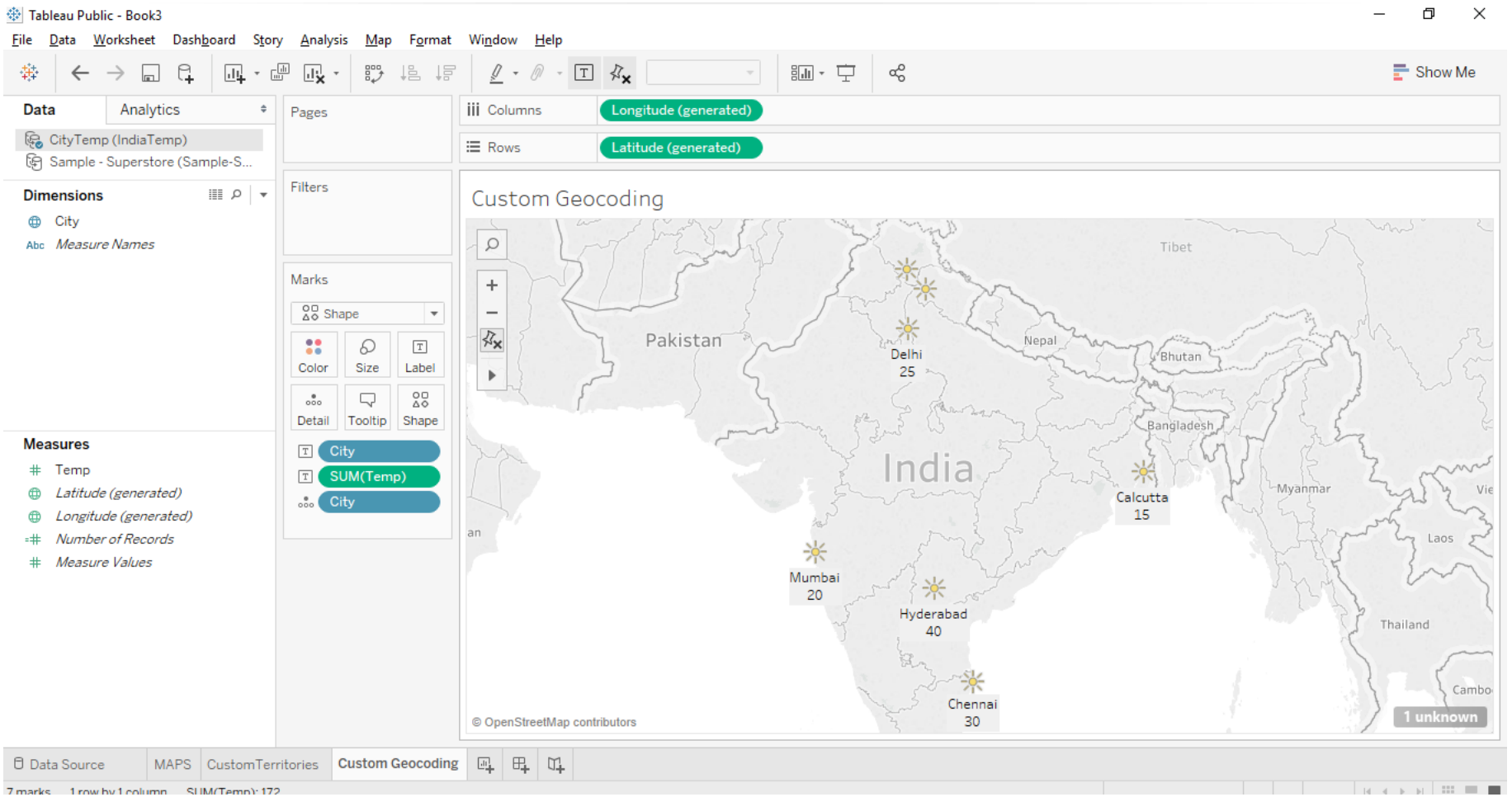
MAPS

Custom Territories : These are used to create custom groups.



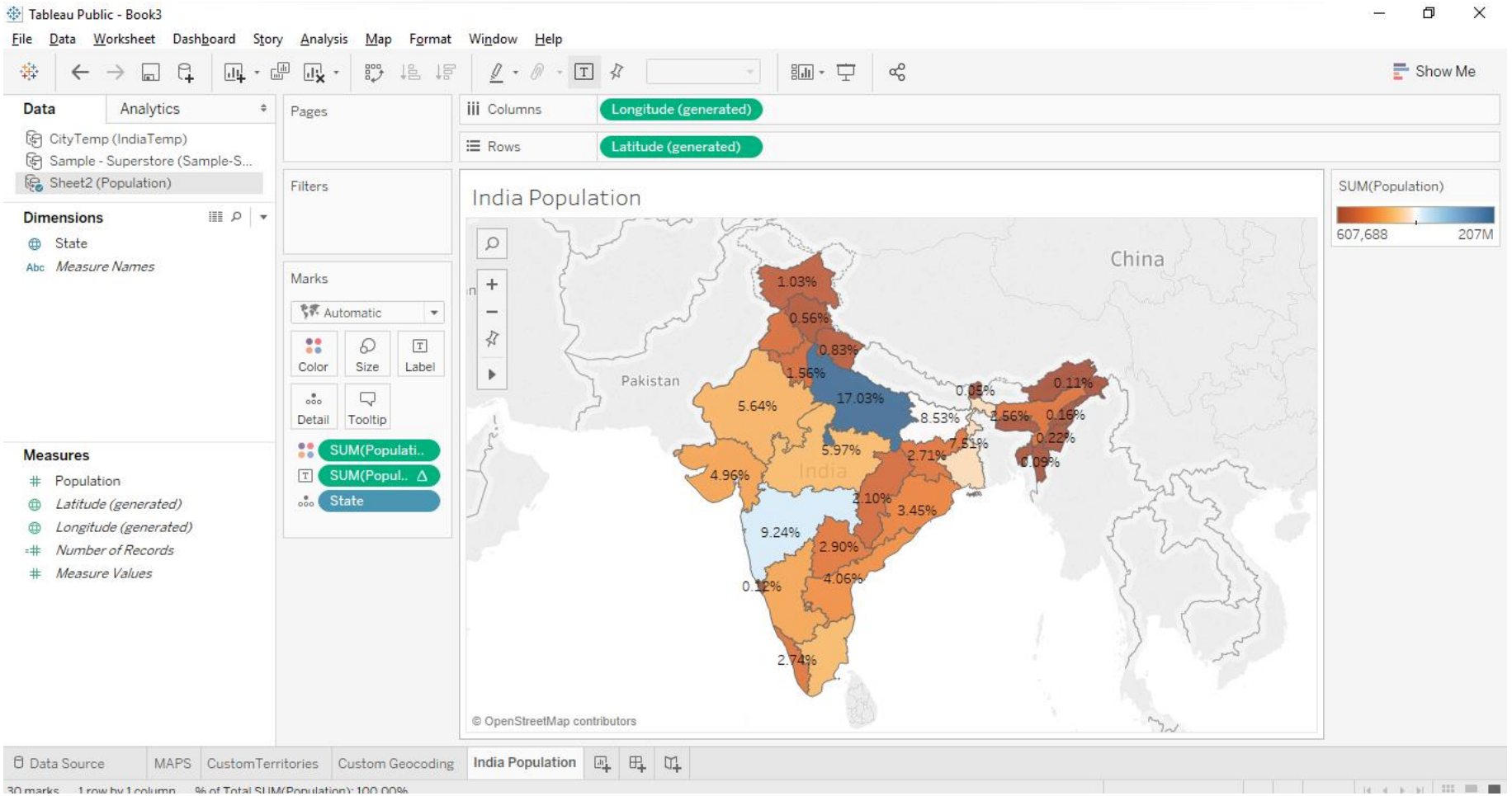
MAPS

Custom Geo-coding: These are used to customize the geographic area not recognized by tableau. groups.



MAPS

India Map: Display the population of various states in India.



Worksheet Options

- Create a new sheet. – Ctrl+M
- Rename a sheet
- Delete
- Copy & Paste
- Duplicate
- Duplicate as Crosstab
- Export
- Copy Formatting & Paste Formatting
- Describe Sheet
- Show Title
- Show Caption
- Show Summary
- Show Cards
- Show View Toolbar
- Highlighting

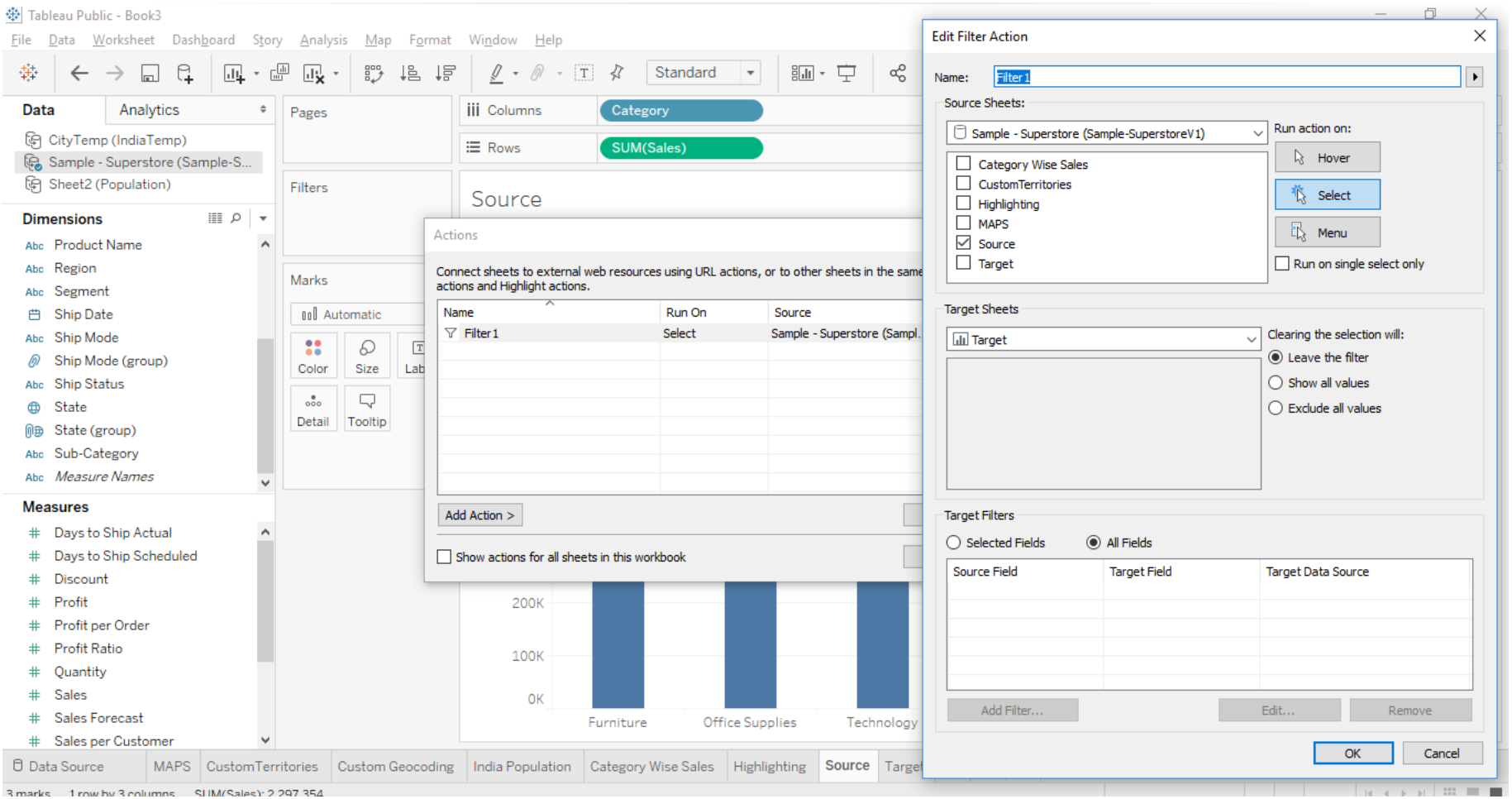
ASSIGNMENT

- Create a Category interactive bump chart to display subcategory wise bumps on the basis of years.
- Represent the state wise population percentage of India using MAP.
- Create a Region Interactive Horizontal Bar chart to represent Category & Subcategory wise Profit. The Chart should also display Dynamic Title & Caption.

Actions

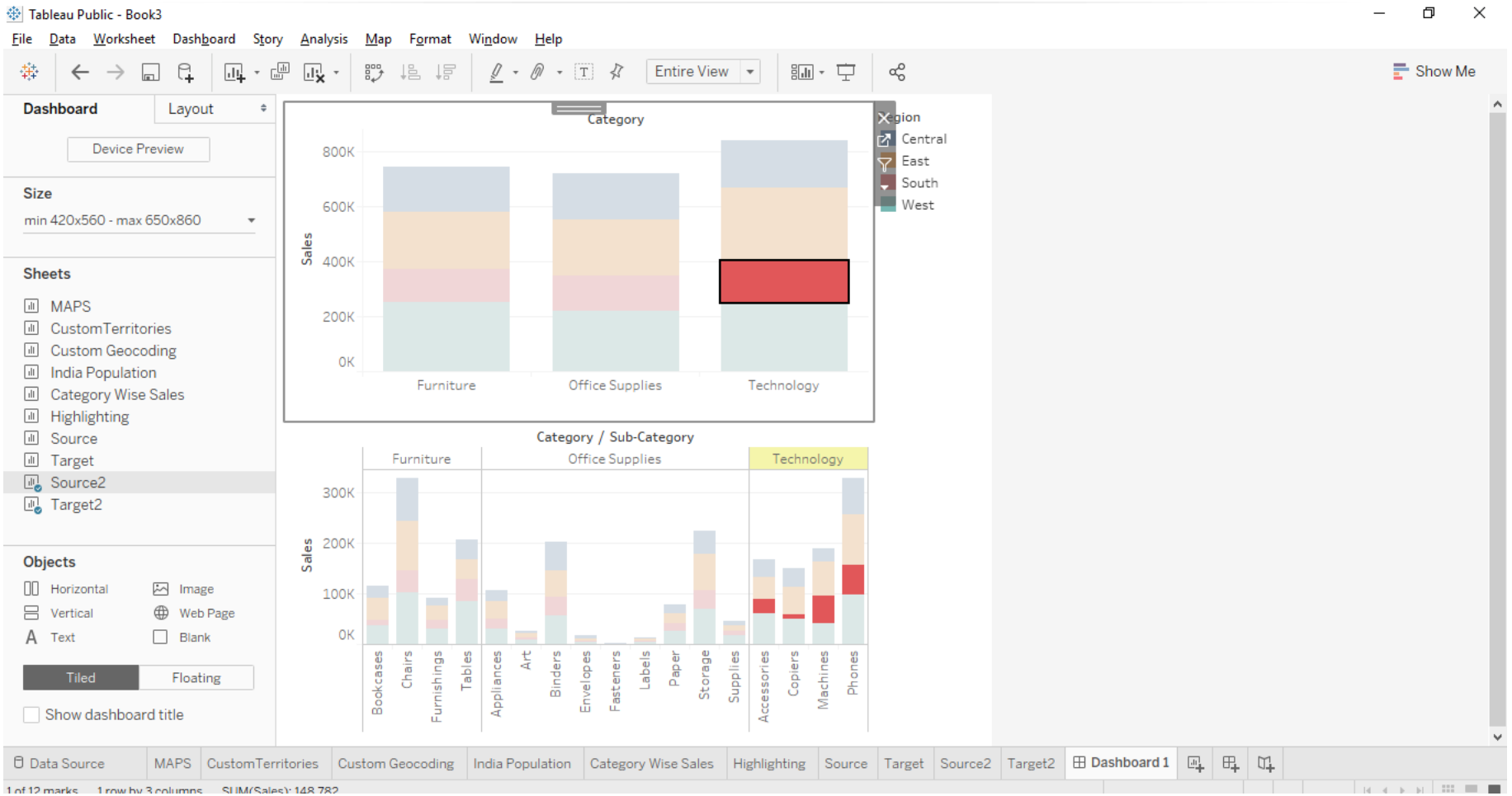
Actions: These are the activities performed when we trigger an event.

Actions Filter : Target visual will be filtered with reference to source visual.



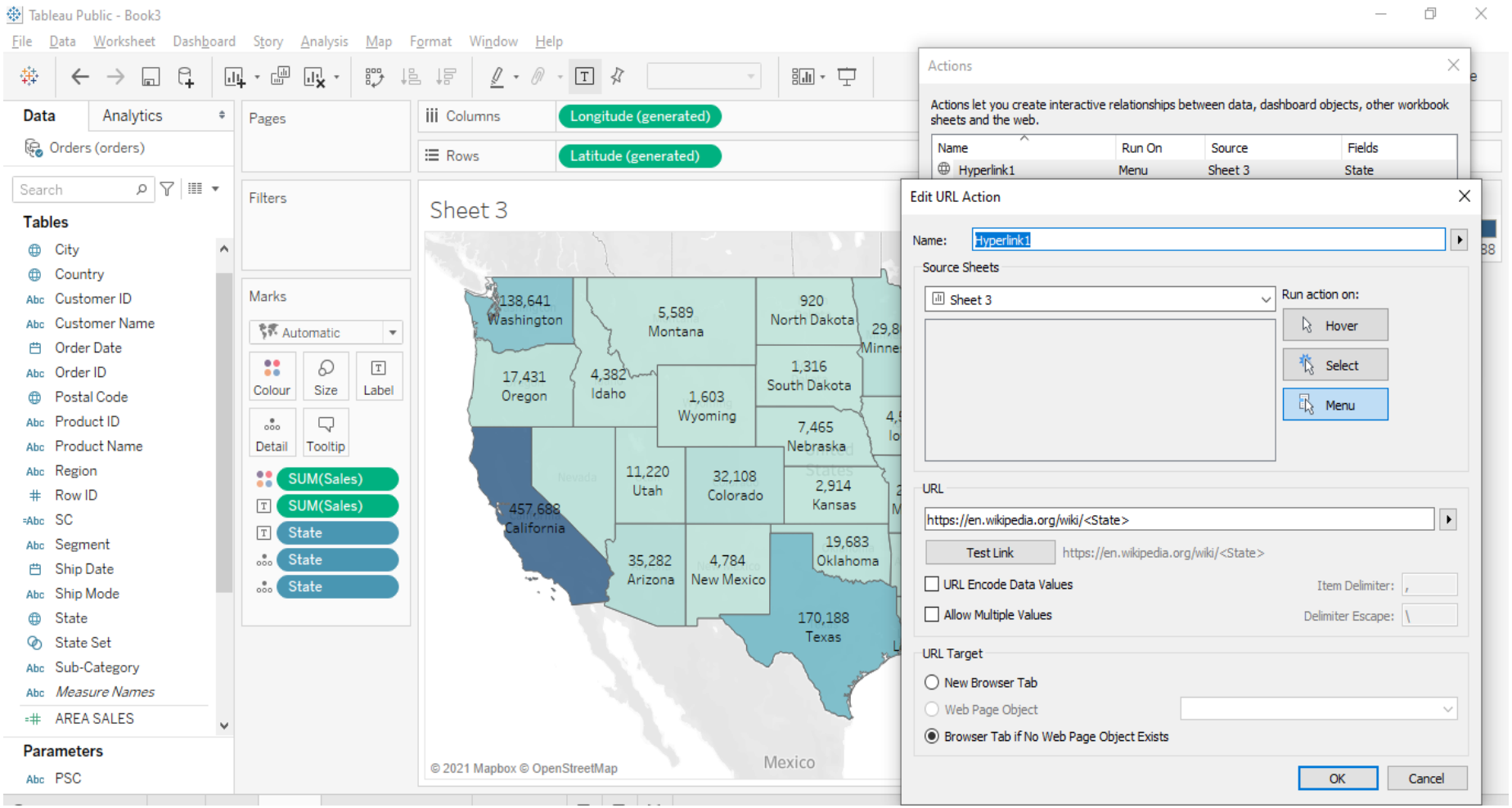
Actions

Actions Highlight: Using this feature highlighting will be done with some event.



Actions

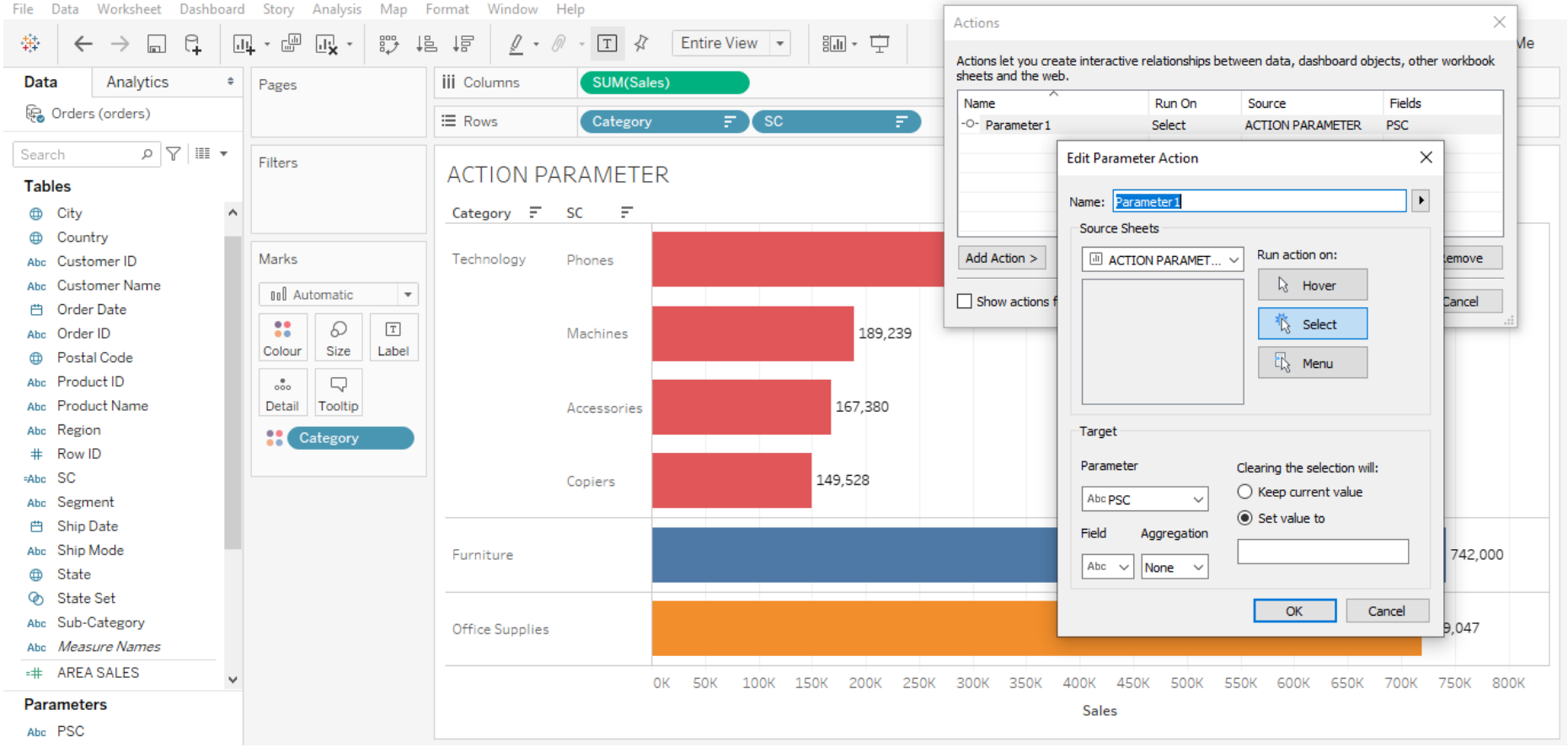
Actions URL: This feature allows us to open a browser when some event occurs.



Actions

Actions Parameter : This feature allows us to dynamically set the value of the parameter.

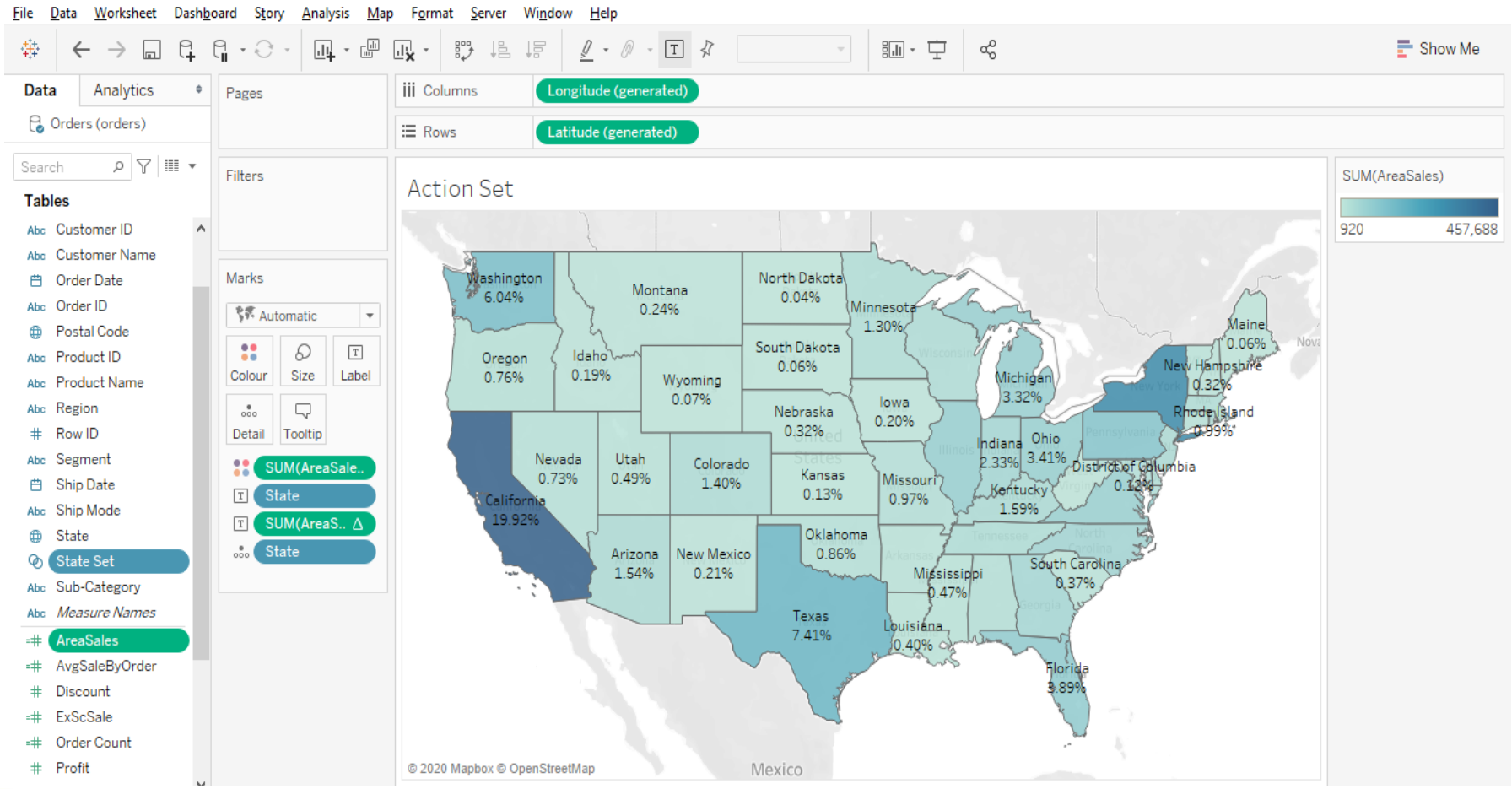
- Create a parameter
- Create a Calculated field
- Assign action to assign the value to the parameter



Actions

Actions Set: This feature allows us to dynamically pass the values to the set.

- Create a Set
- Create a Calculated field
- Assign action to set



ASSIGNMENT

- Using India Map Represent state wise percentage of Covid cases.
- In the another sheet create a bar chart to represent state wise Total Covid Cases, Recovered & Deaths.
- Use action so that the bar graph representation of Covid details should be displayed for the highlighted state.
- In sheet 1 represent Category & Region wise profit, category should be bifurcated on the basis of region.
- In sheet 2 represent Category , Subcategory & Region wise profit.
- Implement an Action on sheet 1 so that sheet 2 which is filtered on region & subcategory for the selected region in sheet 1.
- Create a US Map to display the %age sales contribution of each state. Implement an set action to give the sales comparison of the selected area.
- Represent segment wise profit using a barchart, Implement a action Parameter so that it can be drill down to region.