

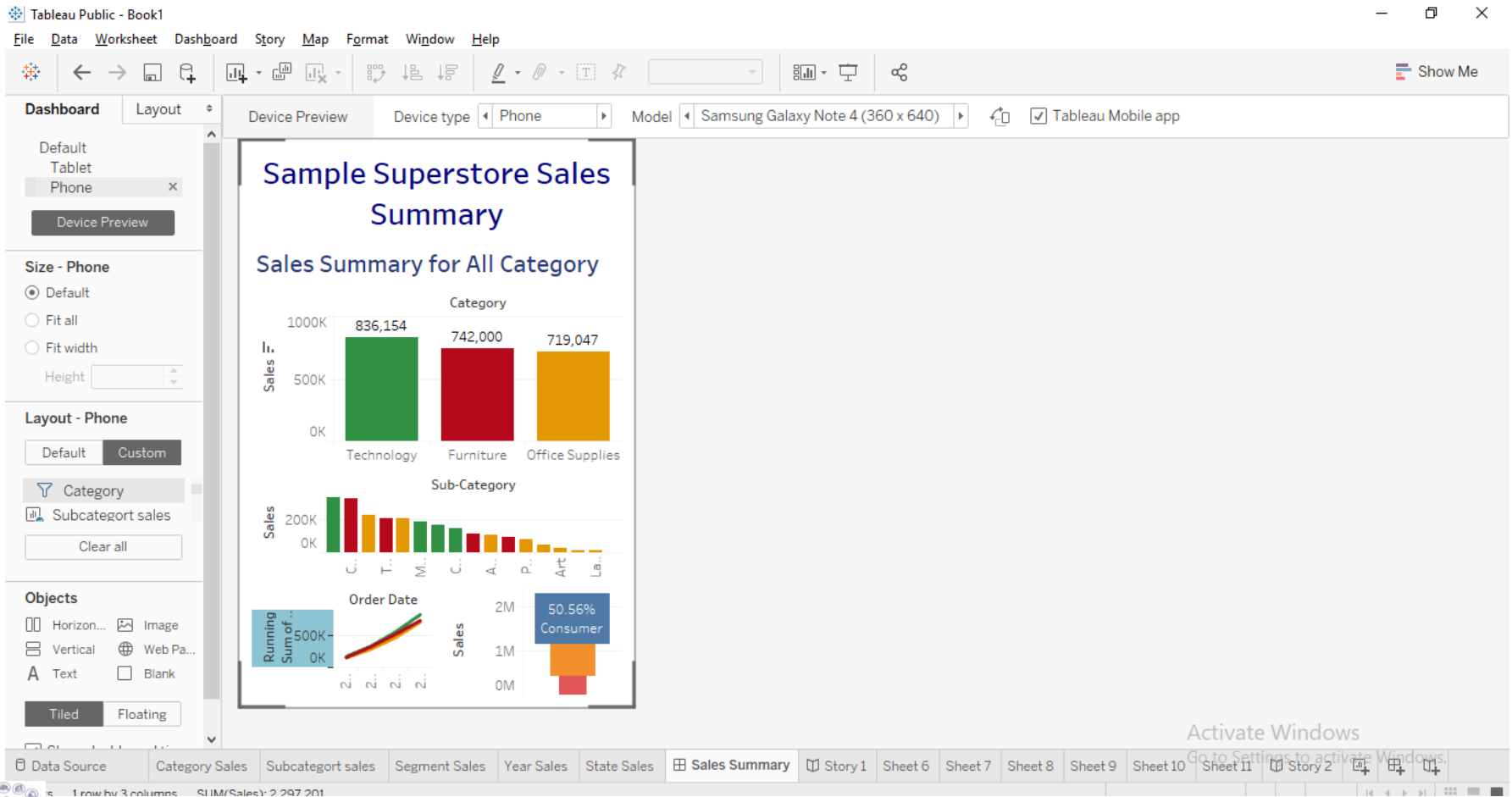
Dashboard Actions

- 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

File Data Worksheet Dashboard Story Map Format Server Window Help

Dashboard Layout

Default Phone

Device Preview

Size Automatic

Sheets

- seg
- cat
- Cat Sales
- SC
- REG

Objects

- Horizontal
- Vertical
- Text
- Image
- Web Page
- Blank
- Navigation
- Download
- Extension

Tiled Floating

Show dashboard title

Cat Sales

Sales

Category

Technology 836,154

Furniture 742,000

Region Bifraction for All Category

West 31.58%

Centre 21.82%

South 17.05%

East 29.55%

Edit Filter Action

Name: Filter2

Source Sheets

Dashboard 2

Run action on:

- Hover
- Select
- Menu

Run on single select only

Target Sheets

Dashboard 2

Clearing the selection will:

- Leave the filter
- Show all values
- Exclude all values

Target Filters

Selected Fields All Fields

Source Field	Target Field	Target Data Source

Add Filter... Edit... Remove

OK Cancel

Show Me

330,007

328,449

223,844

206,966

203,413

189,239

Fields

at Sales) All

Edit... Remove

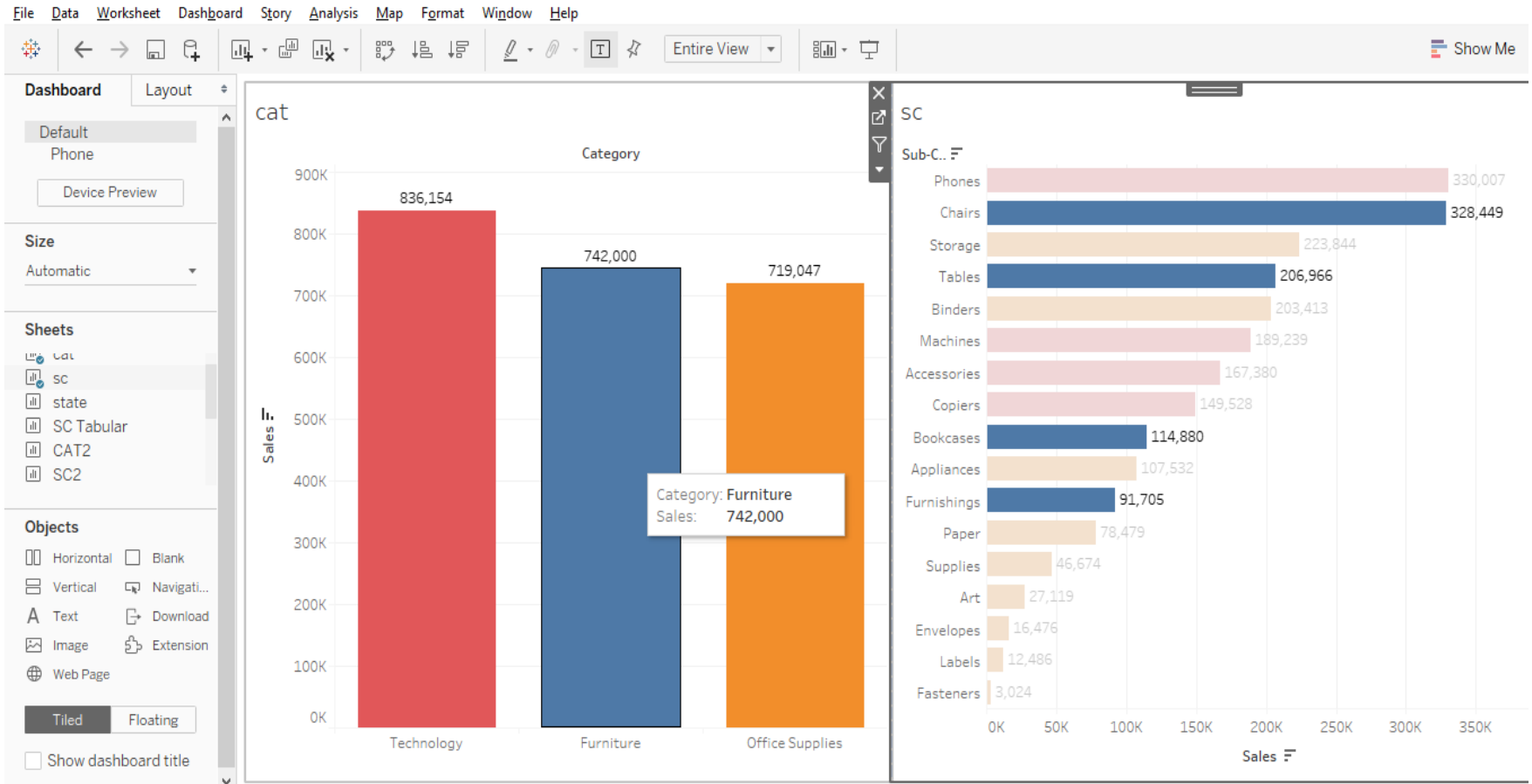
OK Cancel

200K 250K 300K 350K

Sales



Dashboard Actions -Action Highlight



Dashboard Actions -Action URL

File Data Worksheet Dashboard Story Analysis Map Format Window Help

Dashboard Layout

Default Phone Device Preview

Size Automatic

Sheets

- cat
- SC
- state
- SC Tabular
- CAT2
- SC2

Objects

- Horizontal Blank
- Vertical Navigati...
- A Text Download
- Image Extension
- Web Page

Tiled Floating

Show dashboard title

Map of the United States showing population by state:

State	Population
Washington	38,641
Oregon	17,431
Idaho	4,382
Montana	5,589
North Dakota	920
South Dakota	1,316
Nebraska	7,465
Utah	11,220
New Mexico	4,784
Oklahoma	19,683
Texas	170,188
Mississippi	10,771
South Carolina	8,482
Florida	89,474
California	457,688
Wisconsin	32,115
Indiana	58,555
District of Columbia	2,865
New Hampshire	7,293

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California

From Wikipedia, the free encyclopedia Coordinates: 37°N 120°W﻿•37°N 120°W

This article is about the State of California. For other uses, see California (disambiguation).

California is a state in the Pacific Coast region of the United States. With over 39.3 million residents across a total area of

California

State

State of California

Flag Seal

Nickname(s): Golden State^[1]
Motto(s): "Eureka"^[2]
Anthem: "I Love You, California"

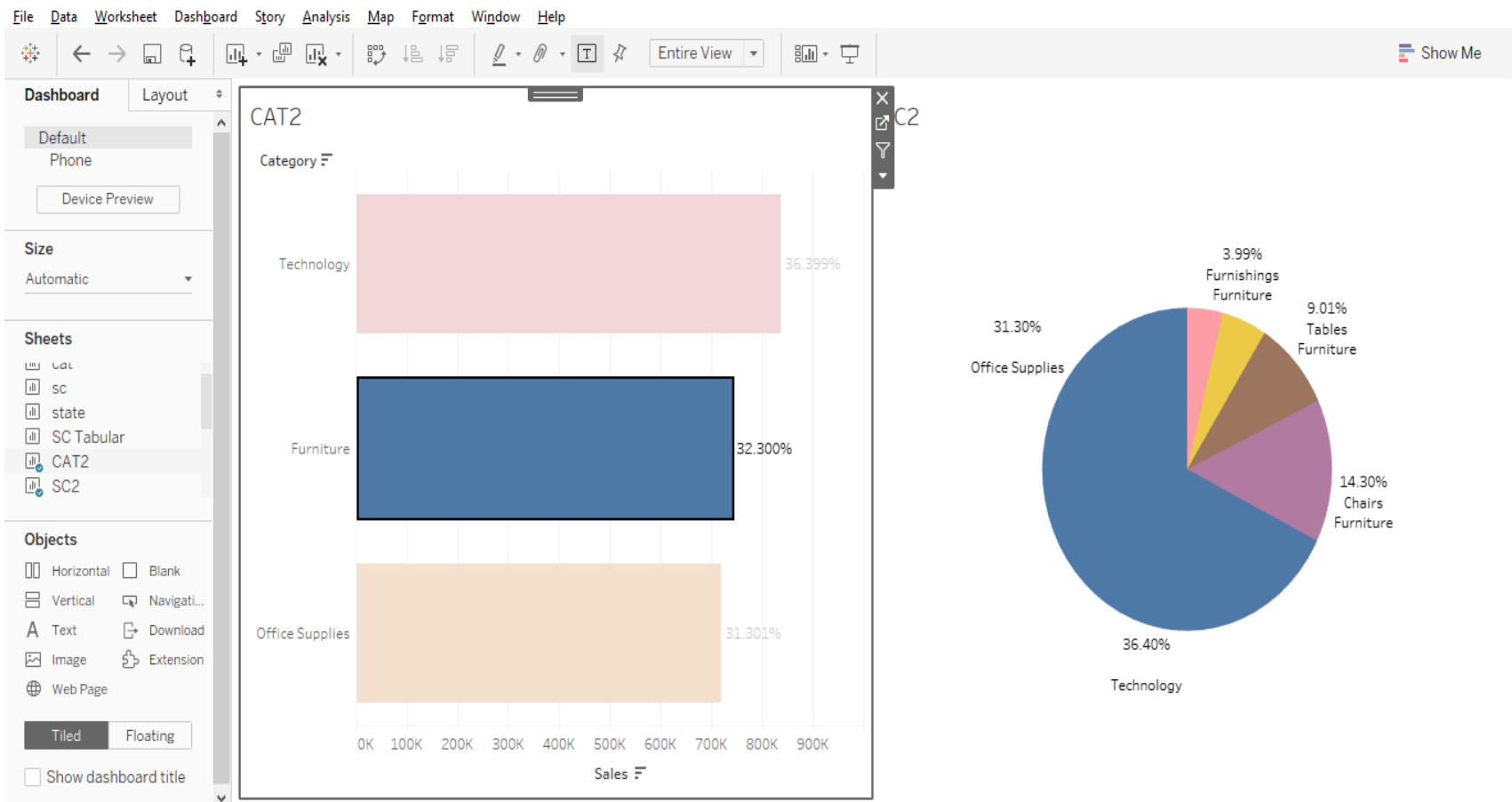
0:00 CC MENU

Map of the United States showing California highlighted in red.



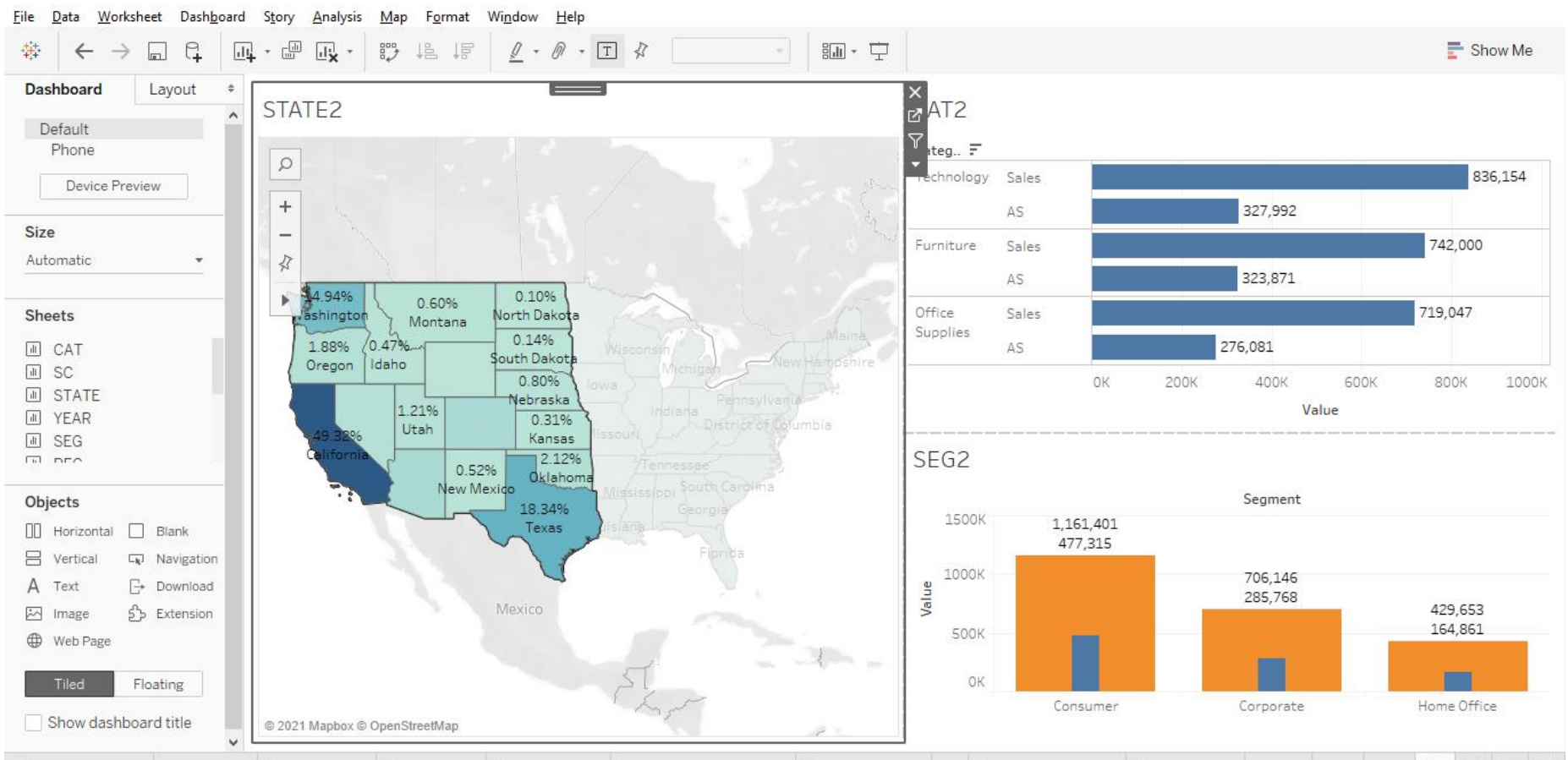
Dashboard Actions -Action Parameter

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



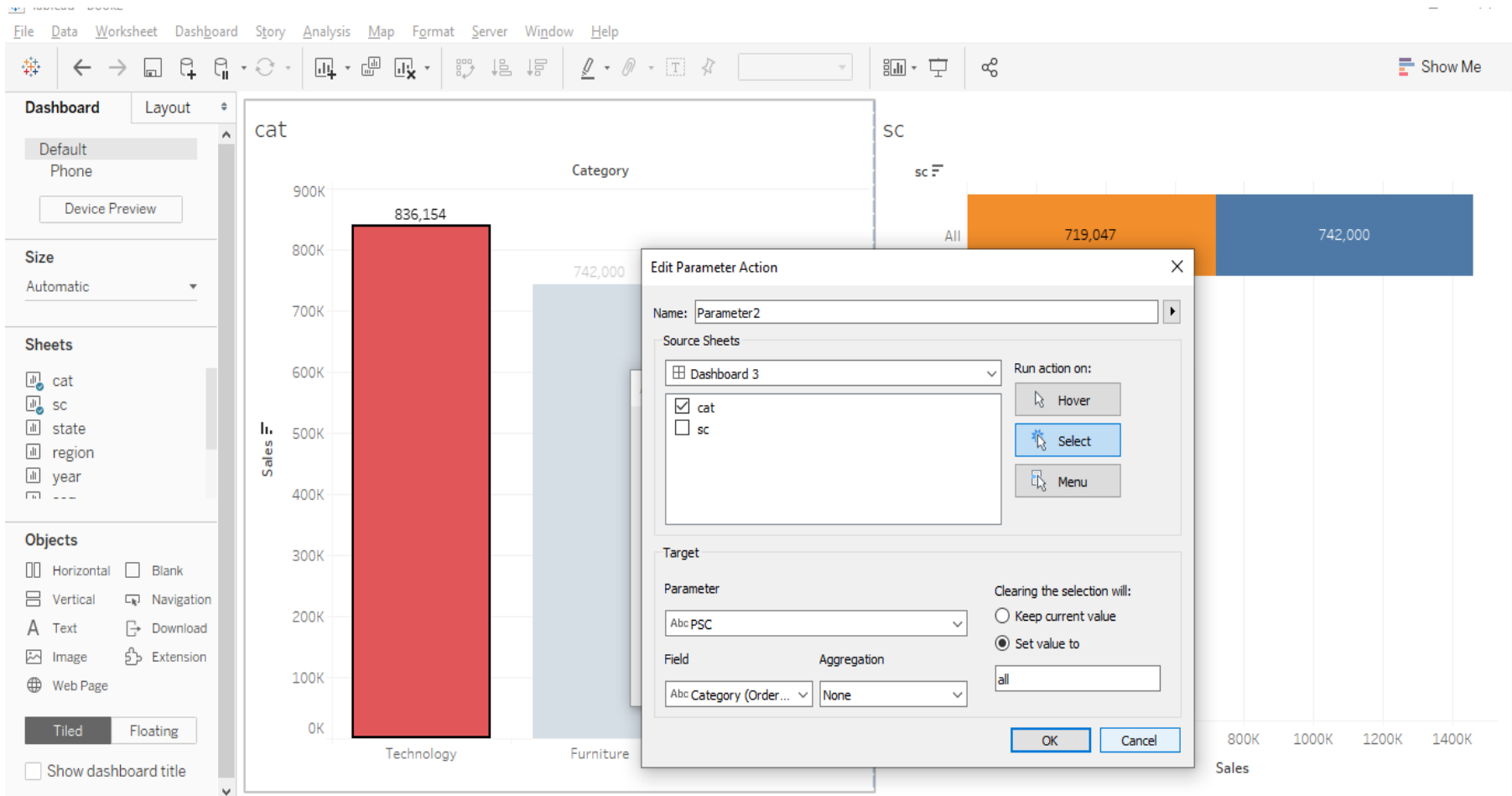
Dashboard Actions -Action Set

- 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:

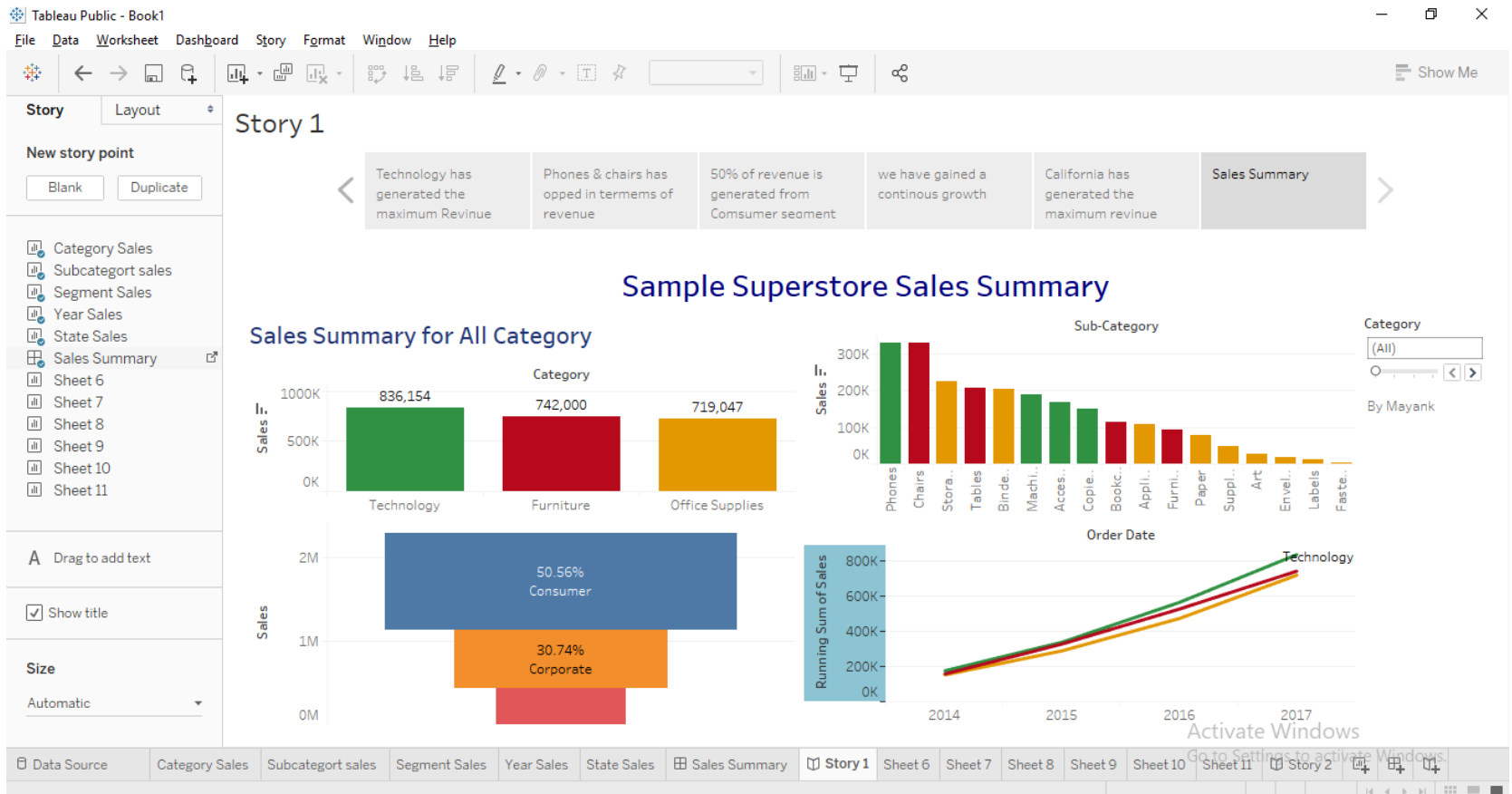
- Month Wise profit earned in each category, Min & Max profit should be displayed.
- Category wise Profit with region details.
- Subcategory wise profit (use waterfall chart).
- Segment wise profit percentage.
- Percentage contribution of each region in over all profit.
- State wise profit earned (Word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

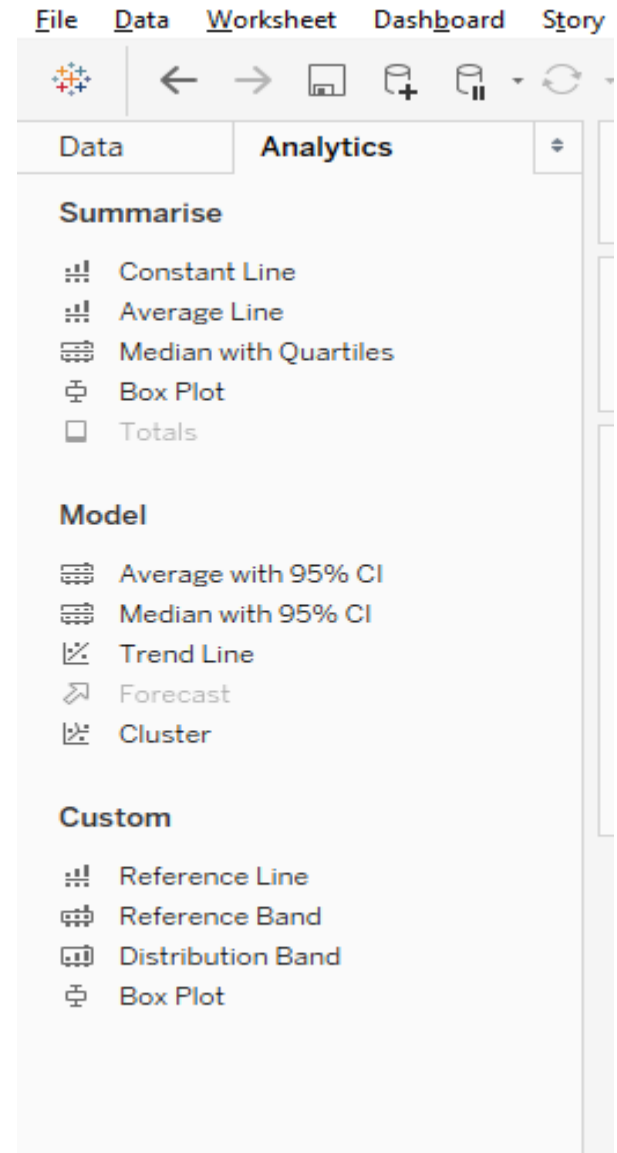


Analytics Pane

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.

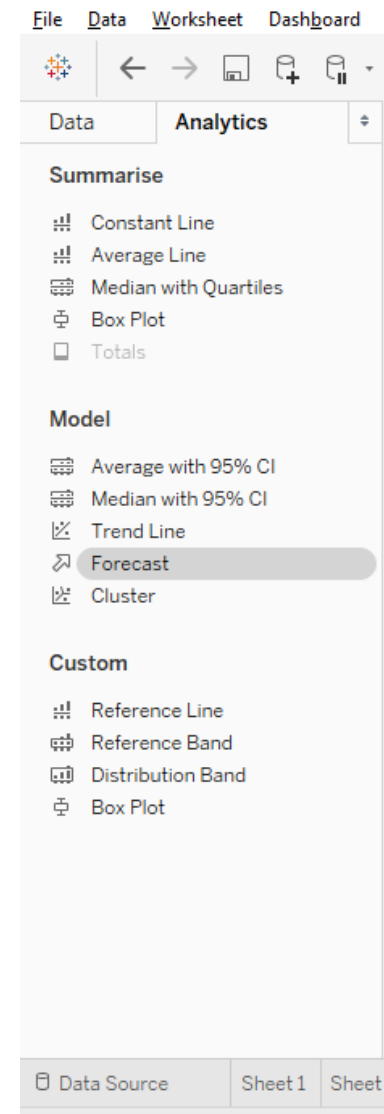
This technique of identifying regular patterns from existing data values and giving a forecast is known as **Exponential Smoothing**.

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

Trends - increase or decrease in data over time

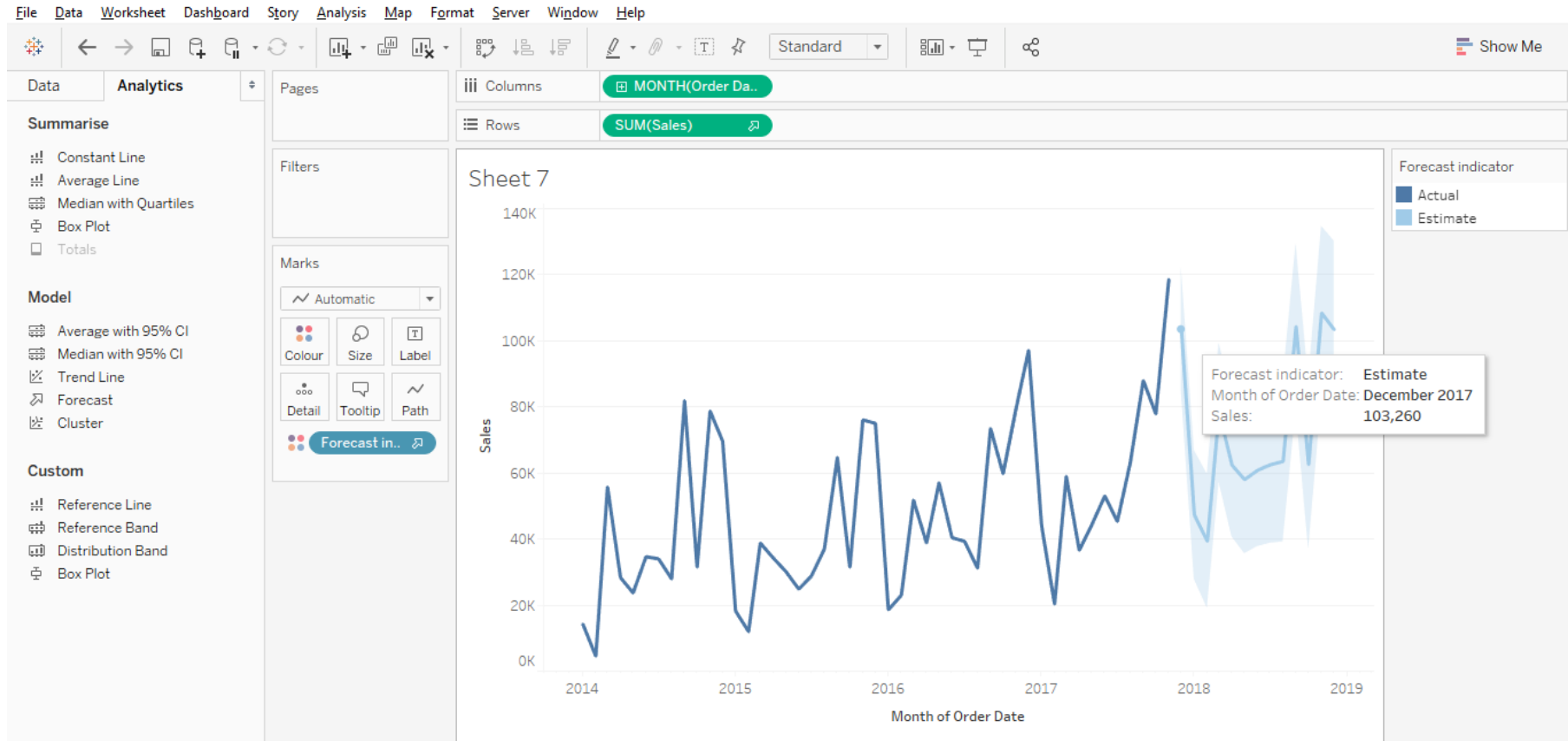
Seasonality - repeating variation in values over a determined period of time (such as weekly, quarterly, yearly, etc) known as seasons

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



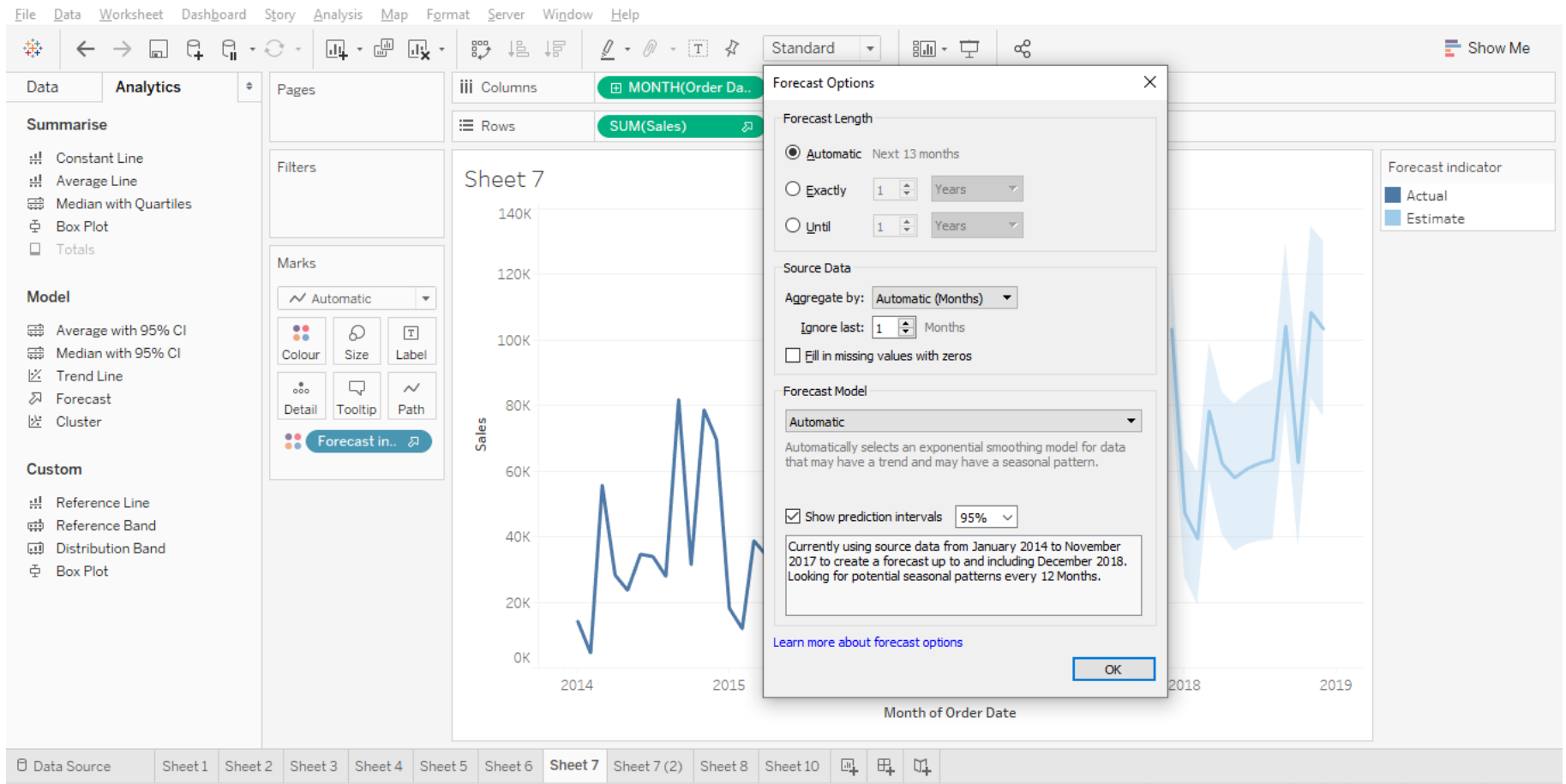
Forecasting

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

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Standard

Show Me

Data Analytics

Pages

Columns MONTH(Order Da..)

Rows SUM(Sales)

Summarise

- Constant Line
- Average Line
- Median with Quartiles
- Box Plot
- Totals

Model

- Average with 95% CI
- Median with 95% CI
- Trend Line
- Forecast
- Cluster

Custom

- Reference Line
- Reference Band
- Distribution Band
- Box Plot

Describe Forecast

Summary Models

Options Used to Create Forecasts

Time series: Month of Order Date
 Measures: Sum of Sales
 Forecast forward: 13 months (December 2017 – December 2018)
 Forecast based on: January 2014 – November 2017
 Ignore last: 1 month (December 2017)
 Seasonal pattern: 12 month cycle

Sum of Sales

Initial	Change From Initial	Seasonal Effect		Contribution		Quality	
December 2017	December 2017 – December 2018	High	Low	Trend	Season		
103,260 ± 18,670	0	November 2018 37,518	February 2018 -31,547	0.0%	100.0%		Ok

☐ Show values as percentages

Copy to Clipboard [Learn more about the forecast summary](#) Close

Forecast indicator

- Actual
- Estimate

2019

Month of Order Date

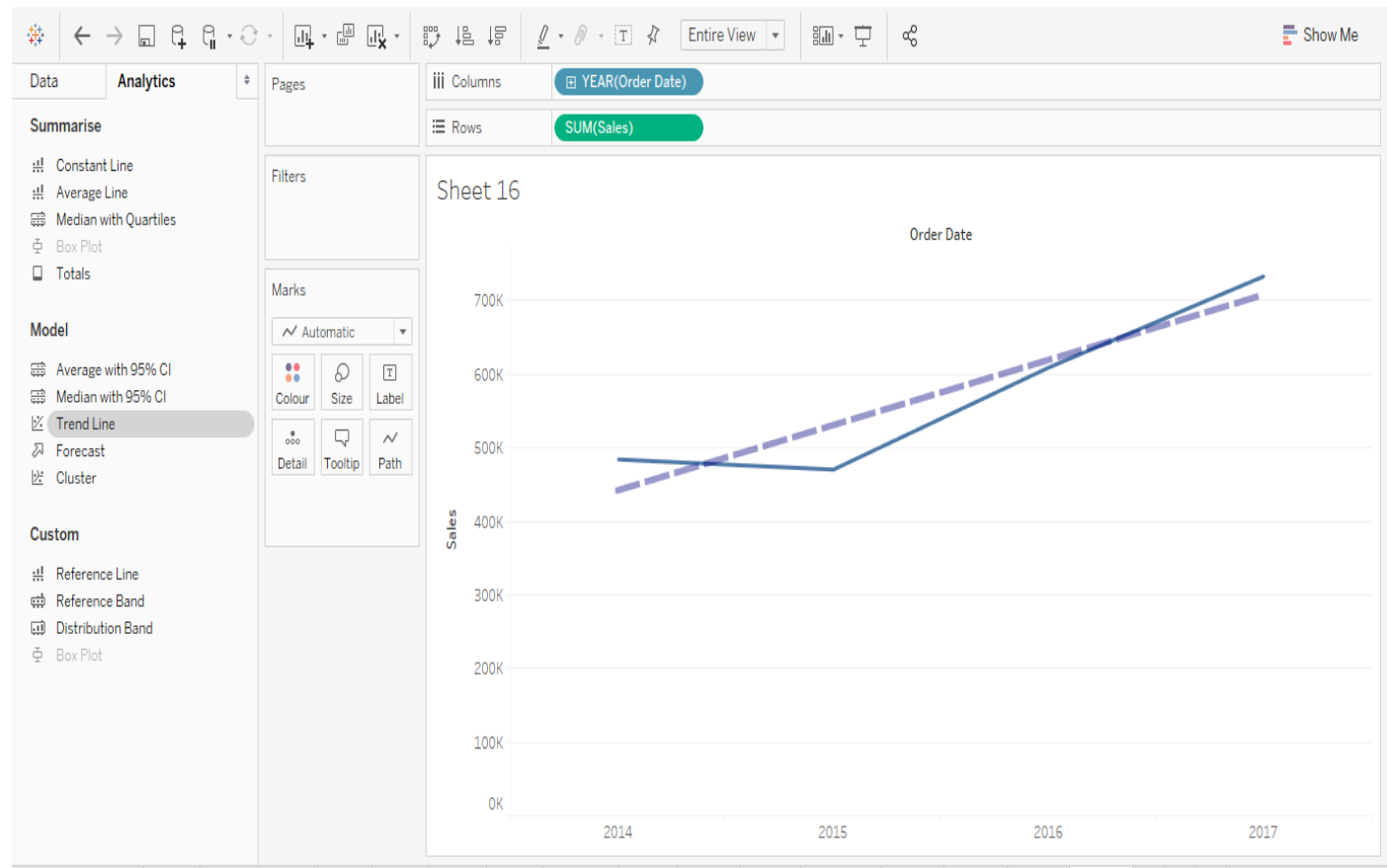


Trend Lines

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.

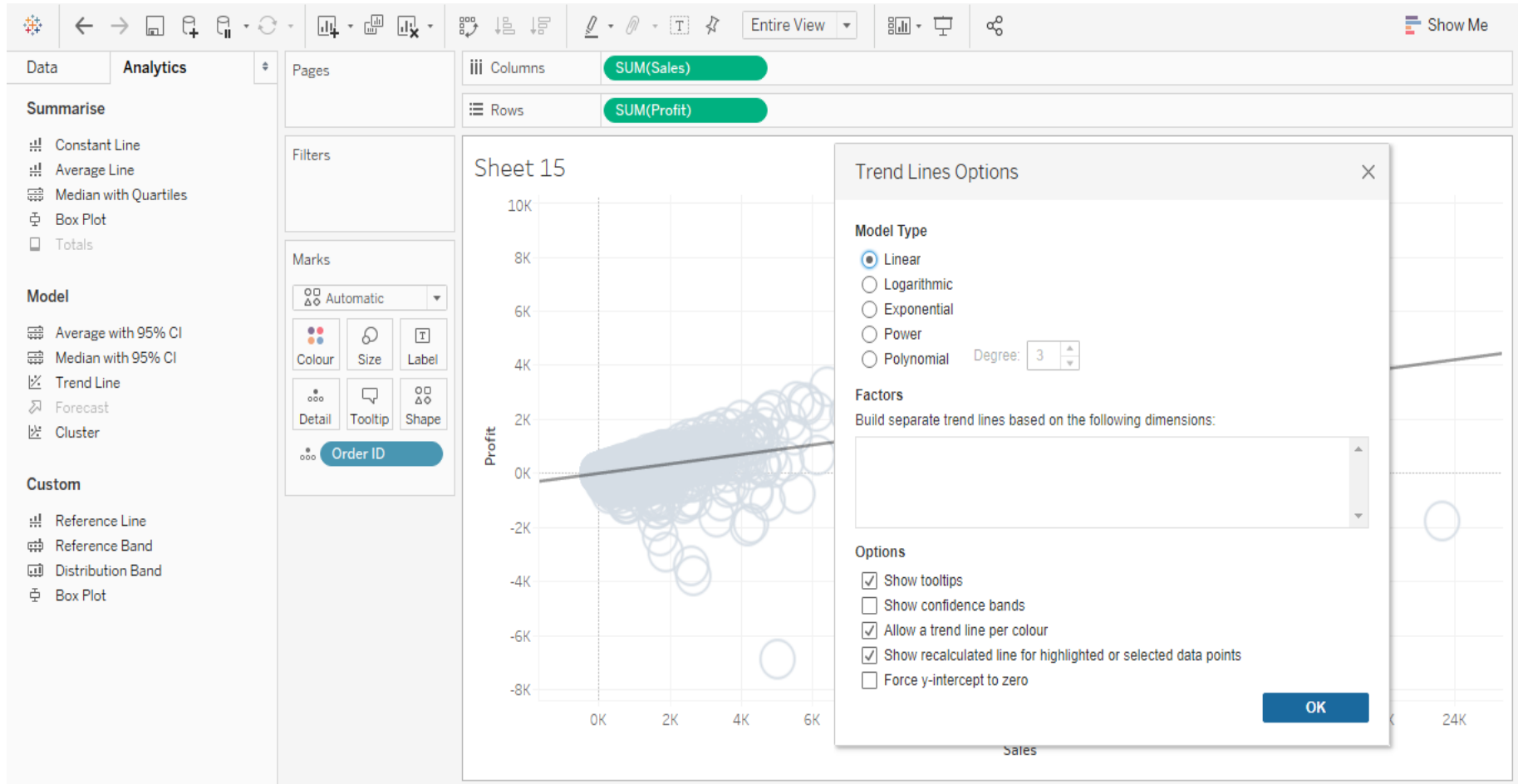
Tableau has a total of five types of trend lines:

- 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

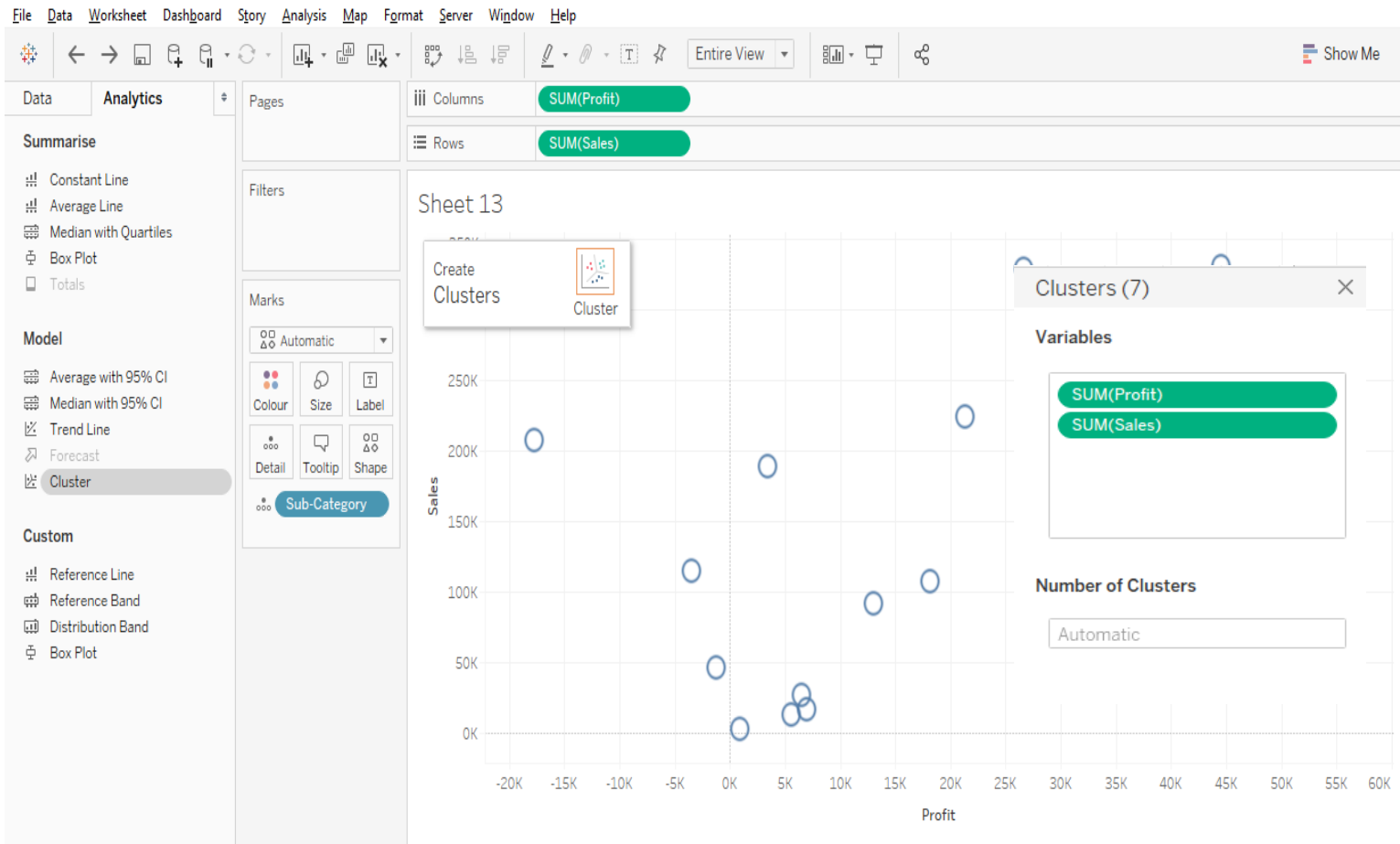
In Tableau clustering is done on the basis of K-means clustering algorithm.

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



New Custom SQL

Edit Custom SQL



```
select emp.eid, NAME, CITY, DOJ, DOB, DEPT , DESI, SALARY  
FROM EMP  
INNER JOIN EMP_SAL  
ON EMP.EID=EMP_SAL.EID
```

Preview Results...

Insert Parameter ▼

OK

Cancel



Parameterized SQL Queries

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

Tableau - Book3

File Data Server Window Help

Connections [Add](#)

DESKTOP-GI...SQLEXPRESS
Microsoft SQL Server

Database

TEST

Table

- EMP_DETAILS
- EMP_PAY
- Emp_Sal
- EMP_SAL_DEL
- EMPCITY
- EMPDE
- EMPDEL
- EMPDETAILS
- New Custom SQL
- New Union

Stored Procedures

- AD_EMP
- ADD_EMP
- ADD_EMP_SAL
- ADD_SAL

Custom SQL Query (TEST)

Connection ☒ Live ☐ Extract

Filters 0 | [Add](#)

Sort fields Data source

Custom SQL Query

```
select emp.eid, NAME, CITY, DOJ, DOB, DEPT , DESI, SALARY
FROM EMP
INNER JOIN EMP_SAL
ON EMP.EID=EMP_SAL.EID
```

Create Parameter

Name: [Comment >>](#)

Properties

Data type:

Current value:

Value when workbook opens:

Display format:

Allowable values: ☒ All ☐ List ☐ Range

[OK](#) [Cancel](#)

[Preview Results...](#) [Insert Parameter](#) [OK](#) [Cancel](#)

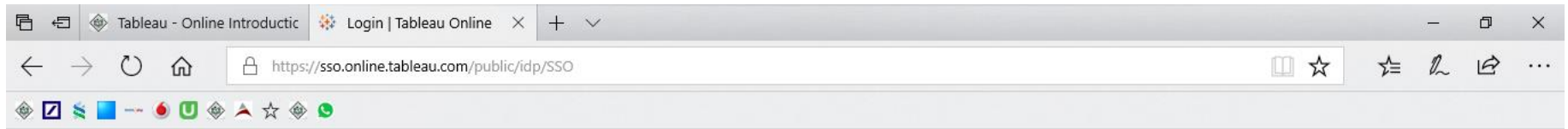
eid	NAME	CITY	DOJ	DOB	DEPT	DESI	SALARY
1005	Manoj Kumar	DELHI	3/1/2018	10/11/1983	HR	ASSOCIATE	66,000
1007	Kapil Sharma	Gurgaon	1/2/2017	10/10/1989	HR	ASSOCIATE	71,500
1011	AMIT KAPOOR	DELHI	12/12/2018	10/5/1990	HR	ASSOCIATE	35,000
1012	MONIKA ARORA	DELHI	12/12/2018	10/21/1989	HR	SR. ASSOCIATE	50,000
1019	RAJAT KAPOOR	DELHI	12/12/2018	10/10/1989	HR	ASSOCIATE	55,000
1020	Rohan Kumar	DELHI	1/2/2017	10/10/1989	HR	ASSOCIATE	71,500
1035	MANOJ TIWARI	GURGAON	12/12/2018	10/5/1990	HR	ASSOCIATE	35,000
1037	MIKE	DELHI	12/12/2018	10/21/1989	HR	SR. ASSOCIATE	50,000
1050	AMAN MUDGAL	DELHI	12/12/2018	10/10/1989	HR	ASSOCIATE	55,000

Data Source Sheet1



Tableau Online

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



Sign in to Tableau Online

☐ Remember me

[Forgot password](#)

Sign In →

[Sign Up](#)

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[Trust & Status](#)

[Privacy](#)

[Patent & Other IP](#)

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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

Publish Workbook to Tableau Online

Project

Demo

Name

SuperStore|

Description

This is my first project for Super Store Sales summary

Tags

profit

region

sales

5 Tags

Sheets

All Edit

Permissions

Set to existing workbook default Edit

Data Sources

1 embedded in workbook Edit

More Options

☐ Show sheets as tabs

☒ Show selections

Publish





Thanks!

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

**Rajeev Garg
Data Analytics Trainer
9899245970**

