

Step by Step Guide for Project: Comparison of Region Based on Sales

Brief Write-up:

Create a Dashboard using 10 worksheets as below:

I. Creating Hierarchy, Parameters & Calculated Fields:

1. Load the dataset of Orders dataset from Sample – Superstore data source.
2. Create hierarchy of “Location” using Country, Region, State, City and Postal Code.
3. Create **two parameters**:
 - a) **“Primary Region”** with List of Values as
East: East,
West: West,
Central: Central,
South: South

data type: String
 - b) **“Secondary Region”** with List of Values as
East: East,
West: West,
Central: Central
South: South

data type: String
4. Create calculated fields for:
 - i) Maximum Sales: MAX([Sales])
 - ii) Minimum Sales: MIN([Sales])
 - iii) Average Sales: AVG([Sales])
 - iv) Customer Count: COUNTD([Customer Name])
 - v) Number of Orders: COUNTD([Order ID])
 - vi) Number of Products: COUNTD([Product ID])
 - vii) First Order Date: DATE(DATEPARSE ("yyyy-MM-dd", STR(MIN([Order Date]))))

II. Creating Worksheets:

1. Primary Region Map

- i) Drag & drop Country into Details. Drill down Country → Drill down Region.
- ii) Drag & Drop Region into Color.
- iii) In Marks shelf, choose filled map.
- iv) Use pin to reset map.
- v) Drag & drop Region into Filters. Use condition by formula:

Step by Step Guide for Project: Comparison of Region Based on Sales

[Primary Region] = [Region]

- vi) Show Primary Region Parameter.
- vii) Go to Map in toolbar → Background Layers → Set Washout : 100%

2. Secondary Region Map

- i) Drag & drop Country into Details. Drill down Country → Drill down Region.
- ii) Drag & Drop Region into Color.
- iii) In Marks shelf, choose filled map.
- iv) Use pin to reset map.
- v) Drag & drop Region into Filters. Use condition by formula:
[Secondary Region] = [Region]
- vi) Show Secondary Region Parameter.
- vii) Go to Map in toolbar → Background Layers → Set Washout : 100%

3. Primary Top Data

- viii) Drag & drop Region into Columns
- ix) Drag & Drop First Order Date into Text.
- x) Drag & Drop Sales into Text.
- xi) Drag & Drop Average Sales into Text.
- xii) Drag & Drop Customer Count into Text.
- xiii) Drag & Drop Number of Orders into Text.
- xiv) Drag & Drop Number of Products into Text.
- xv) Drag & drop Region into Filters. Use condition by formula:
[Primary Region] = [Region]
- xvi) Show Primary Region Parameter.
- xvii) Format to show columns names

4. Secondary Top Data

- i) Drag & drop Region into Columns
- ii) Drag & Drop First Order Date into Text.
- iii) Drag & Drop Sales into Text.
- iv) Drag & Drop Average Sales into Text.
- v) Drag & Drop Customer Count into Text.
- vi) Drag & Drop Number of Orders into Text.
- vii) Drag & Drop Number of Products into Text.
- viii) Drag & drop Region into Filters. Use condition by formula:
[Secondary Region] = [Region]
- ix) Show Secondary Region Parameter.
- x) Format to show columns names.

5. Primary Information

Step by Step Guide for Project: Comparison of Region Based on Sales

- xi) Drag & Drop Sub-Category & Region into Rows.
- xii) Drag & drop Region into Filter. Use condition by formula:
[Primary Region] = [Region]
- xiii) Drag & drop Measure Names into Filters. Select Sales, Minimum Sales & Maximum Sales.
- xiv) Drag & drop Measure Names into Columns.
- xv) Drag & drop Measure Values into Text.
- xvi) Show Primary Region Parameter.
- xvii) Right click and uncheck Show Header.
- xviii) Format the text to show decimal and edit alias to show Total Sales, etc.
- xix) Drag & drop Category into Tooltip.

6. Secondary Information

- i) Drag & Drop Sub-Category & Region into Rows.
- ii) Drag & drop Region into Filter. Use condition by formula:
[Secondary Region] = [Region]
- iii) Drag & drop Measure Names into Filters. Select Sales, Minimum Sales & Maximum Sales.
- iv) Drag & drop Measure Names into Columns.
- v) Drag & drop Measure Values into Text.
- vi) Show Secondary Region Parameter
- vii) Right click and uncheck Show Header.
- viii) Format the text to show decimal and edit alias to show Total Sales, etc.
- ix) Drag & drop Category into Tooltip.

7. Primary Sparklines

- x) Drag & Drop Order Date into Columns. Change it to Day (Continuous)
- xi) Drag & drop Sub-Category & Sales into Rows
- xii) Right click on Y axis and uncheck Show Header, twice.
- xiii) Drag & drop Region into Colour.
- xiv) Drag & drop Region into Filter. Use condition by formula:
[Primary Region] = [Region]
- xv) Drag & Drop [Primary Region] parameter into Pages shelf.

8. Secondary Sparklines

- i) Drag & Drop Order Date into Columns. Change it to Day (Continuous)
- ii) Drag & drop Sub-Category & Sales into Rows
- iii) Right click on Y axis and uncheck Show Header, twice.
- iv) Drag & drop Region into Colour.
- v) Drag & drop Region into Filter. Use condition by formula:
[Secondary Region] = [Region]

Step by Step Guide for Project: Comparison of Region Based on Sales

- vi) Drag & Drop [Secondary Region] parameter into Pages shelf.

9. Primary Bars

- i) Drag & drop Sales into Columns, Sub-Category into Rows
- ii) Drag & drop Region into Colour
- iii) Drag & drop Region into Filter. Use condition by formula:
[Primary Region] = [Region]

10. Secondary Bars

- i) Drag & drop Sales into Columns, Sub-Category into Rows
- ii) Drag & drop Region into Colour
- iii) Drag & drop Region into Filter. Use condition by formula:
[Secondary Region] = [Region]

III. Creating Dashboard

1. Create a new Dashboard
2. Arrange visualizations as per layout requirements. Have an imaginary split of dashboard into two halves.
3. Keep all Primary Region Visualizations on left side. Hide the titles of visualizations.
4. Keep all Secondary Region Visualizations on right side. Hide the titles of visualizations.