Tutorial: Using Tableau for IRS Procurement Data Analysis

Step 1: Load the Dataset into Tableau

Open Tableau.

Connect to your dataset:

Go to the "Data" menu and select "Connect to Data".

Choose "Text File" and select your CSV file containing the toy dataset.

Click "Open".

Step 2: Understand the Data

View the data preview to ensure it is loaded correctly.

Check that all columns (Supplier, Category, Cost, DeliveryTime, QualityRating) are correctly recognized.

Step 3: Create a Dashboard

Cost Analysis by Category:

Drag the "Category" field to Columns.

Drag the "Cost" field to Rows.

Change the visualization type to "Bar Chart".

Sort the bars in descending order by cost.

Delivery Time Distribution:

Create a new worksheet.

Drag the "DeliveryTime" field to Columns.

Drag the "Supplier" field to Rows.

Change the visualization to "Circle" to represent delivery times by suppliers.

Use "Color" to indicate different suppliers.

Quality Rating by Supplier:

Create another worksheet.

Drag the "Supplier" field to Columns.

Drag the "QualityRating" field to Rows.

Change the visualization type to "Bar Chart".

Color the bars by "QualityRating" for better visual distinction.

Combining Views in a Dashboard:

Go to the "Dashboard" menu and select "New Dashboard".

Drag and drop the created worksheets (Cost Analysis, Delivery Time Distribution, Quality Rating) onto the dashboard area.

Adjust the layout for clarity and ease of interpretation.

Step 4: Adding Filters and Interactivity

Add filters to the dashboard:

Drag the "Category" field to the Filters shelf.

Apply the filter to all sheets to allow users to filter data by category.

Add interactivity:

Use the "Actions" menu to create interactivity between worksheets.

Set up actions like "Filter" or "Highlight" to enhance user experience.

Step 5: Publish and Share

Save your workbook.

Publish the dashboard to Tableau Server or Tableau Public for sharing:

Go to the "Server" menu and select "Publish Workbook".

Follow the prompts to complete the publishing process.