

# Tableau Refresher - 1

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Agenda:

Theory on different types of tables:

Theory on different data structure

Dataset used for the class:

Business Problem-1:Display sales for each sub category by region for all the years in a table format

Business Problem 2 :Display sales of for each subcategories by region for all the years in a table format and highlight values that has the highest and lowest sales

Business problem 3-Display sales and profit for each subcategories by region for all the years in a table format

Business problem 4: Create a group called as small items which include Binder, Bookcases, Envelope, Fastener and supplies and compare its sale with the rest of the categories

Business problem 5 -create a set of customers with highest profit

Business Problem 6 -Find the top 5 product subcategories by sales

Business problem 7- Find top customers by sales but low profitability

Business problem 8: Allow users to filter out the top 10 products subcategories by average discount.

Business problem 9: Build a Hierarchy of Product category and Sub Category and have a plot which displays sales of product by category and drill it down using the hierarchy to display sales by sub category

Agenda:

- Charts
  - Text Table
  - Highlight Table
  - Heat Map
  - Difference Between Highlight table and Heat Map
- Groups
- Sets
  - Static

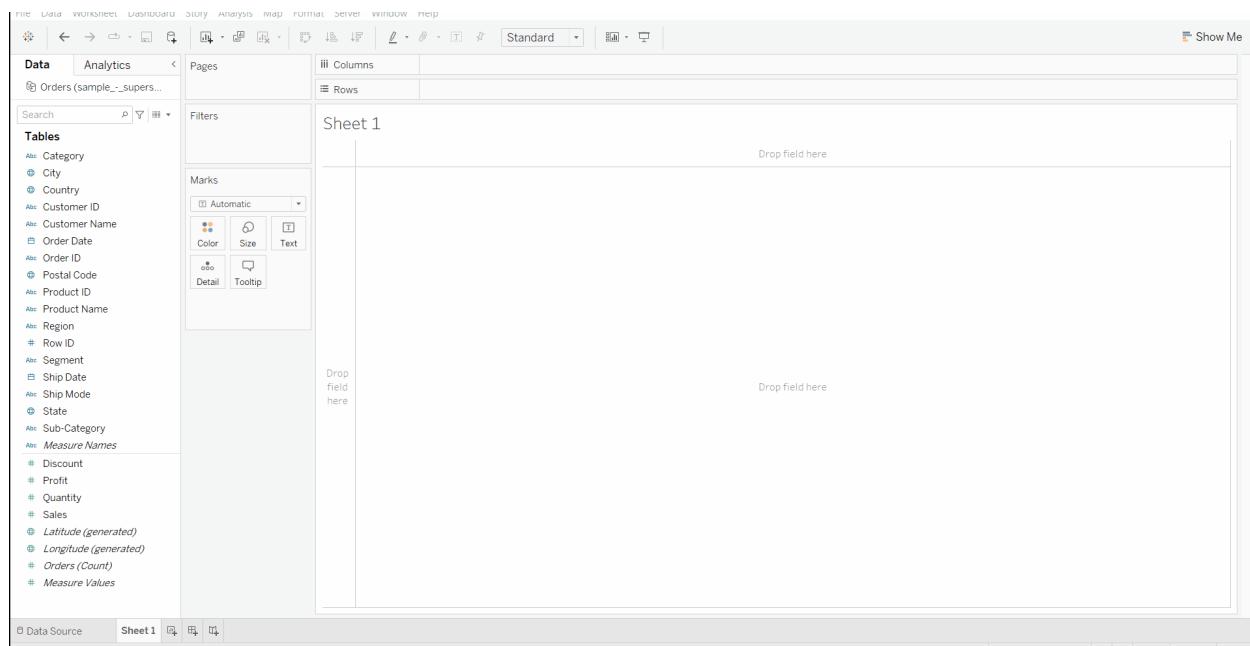
- Dynamic
  - Combined
- Groups Vs Sets
- Parameter and its application
- Hierarchy
- Sorting

Dataset used for the class:

 Modified\_sample\_-\_superstore.xls

Business Problems:

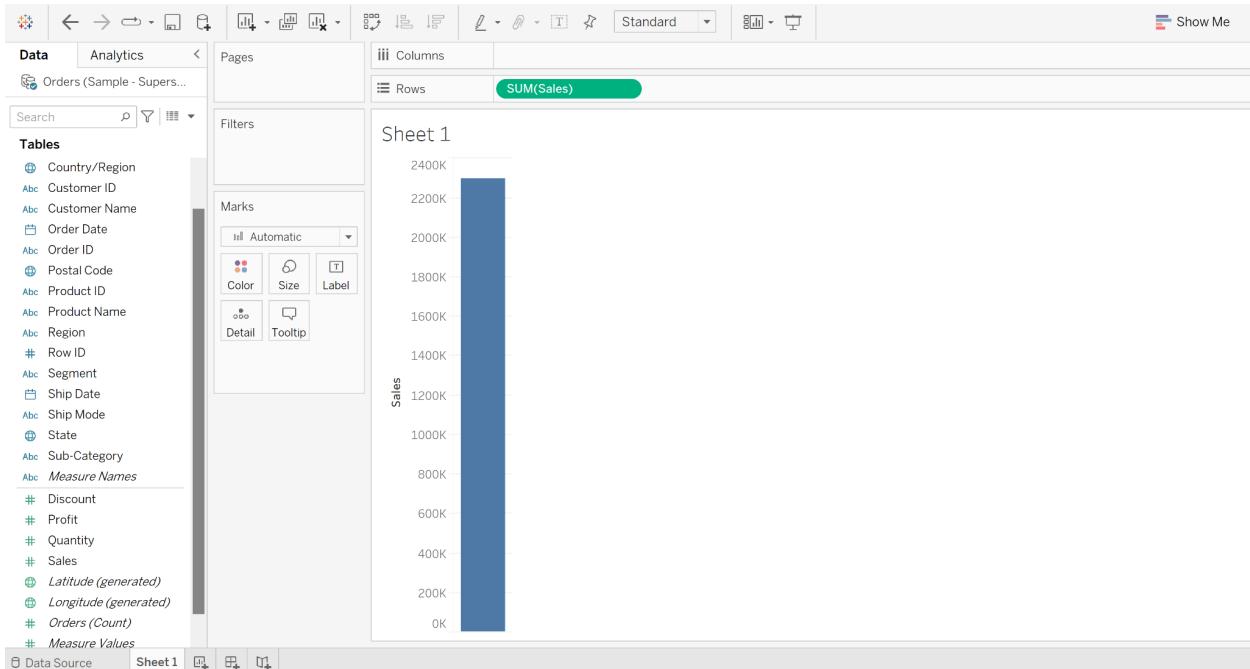
Business Problem 1: Find product category that has highest sales for most of the years



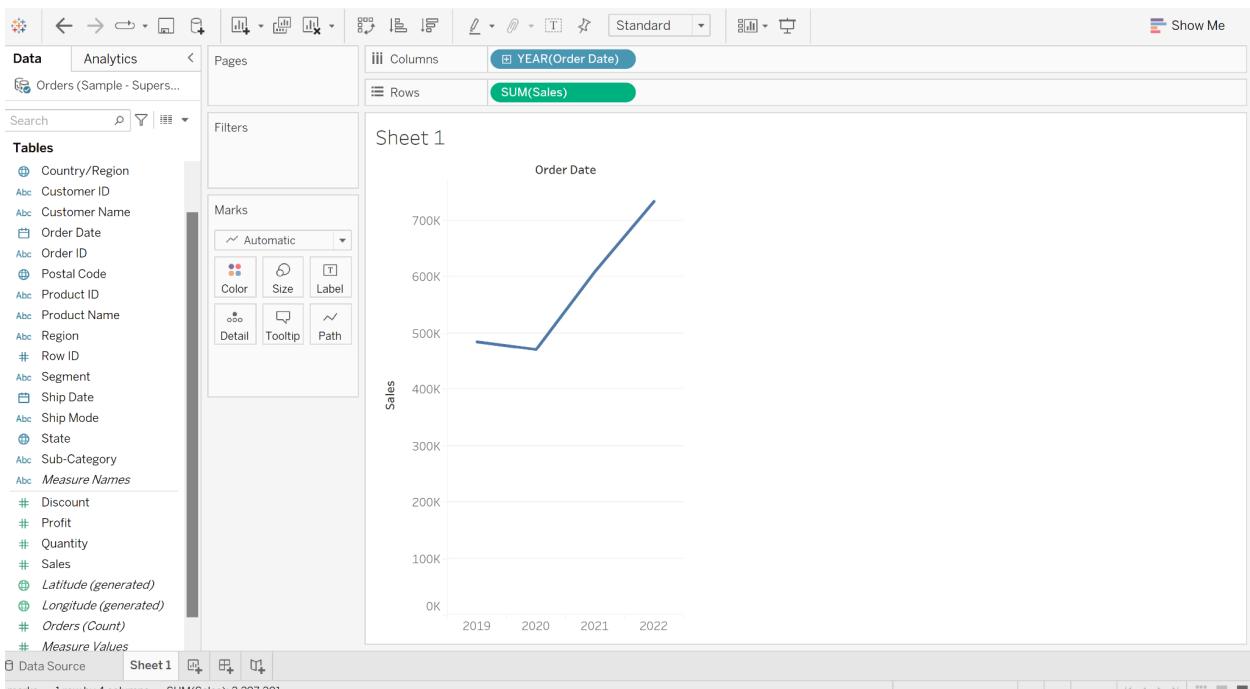
Business problem 2: Find the year and month that had the highest and lowest sales.

**Solution-2:**

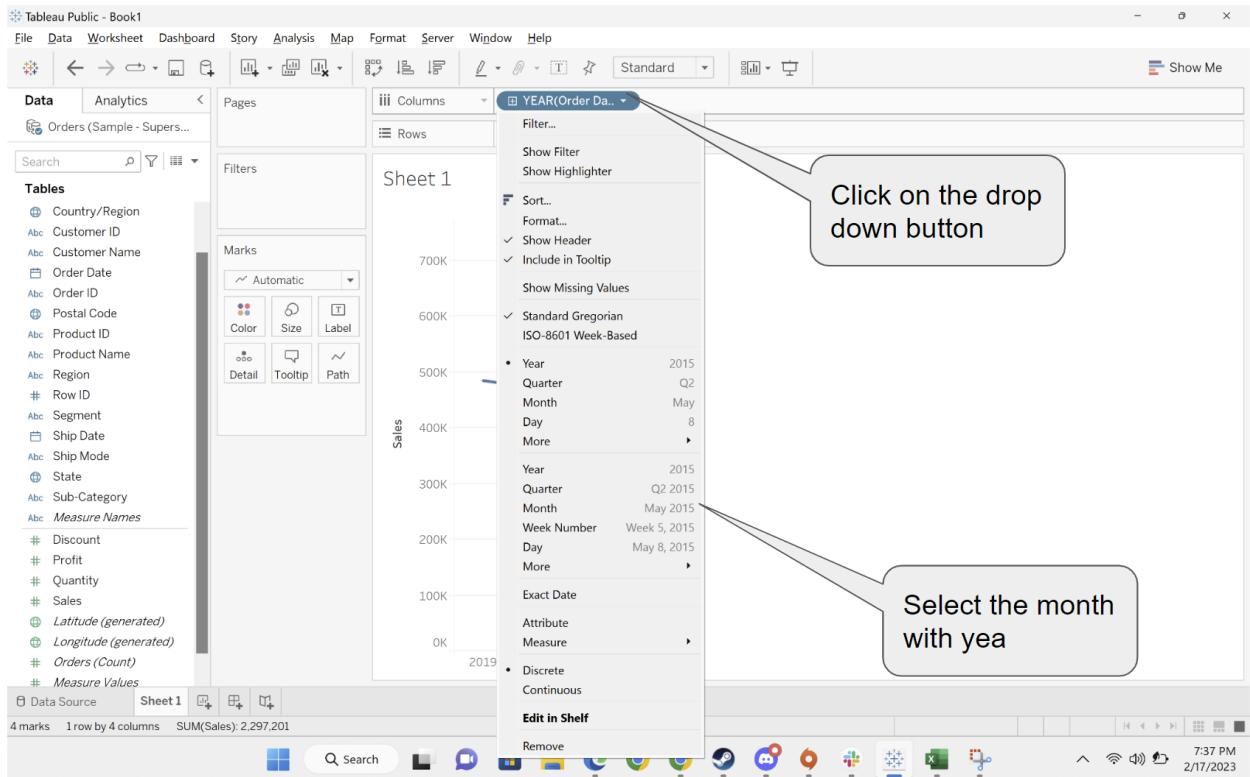
- Step-1: Drag 'sales' measures to row



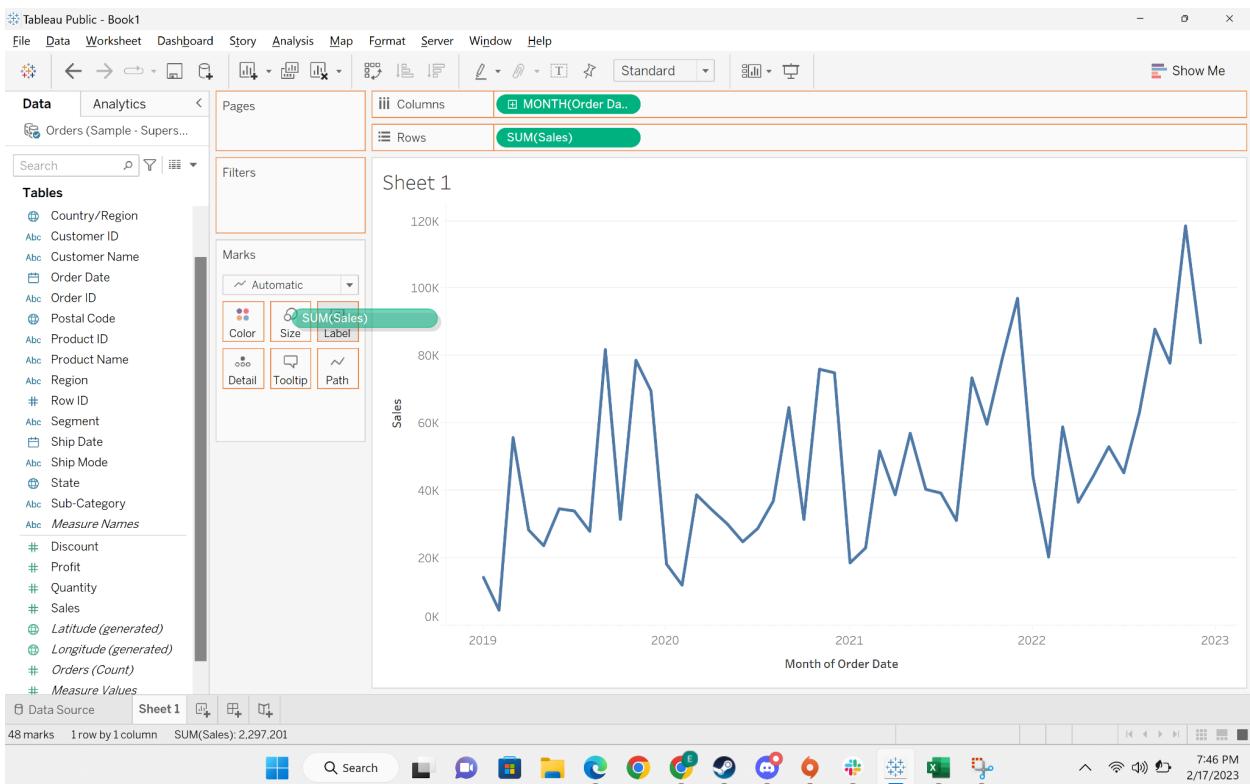
- Step-2: Drag ‘order date’ dimension to column

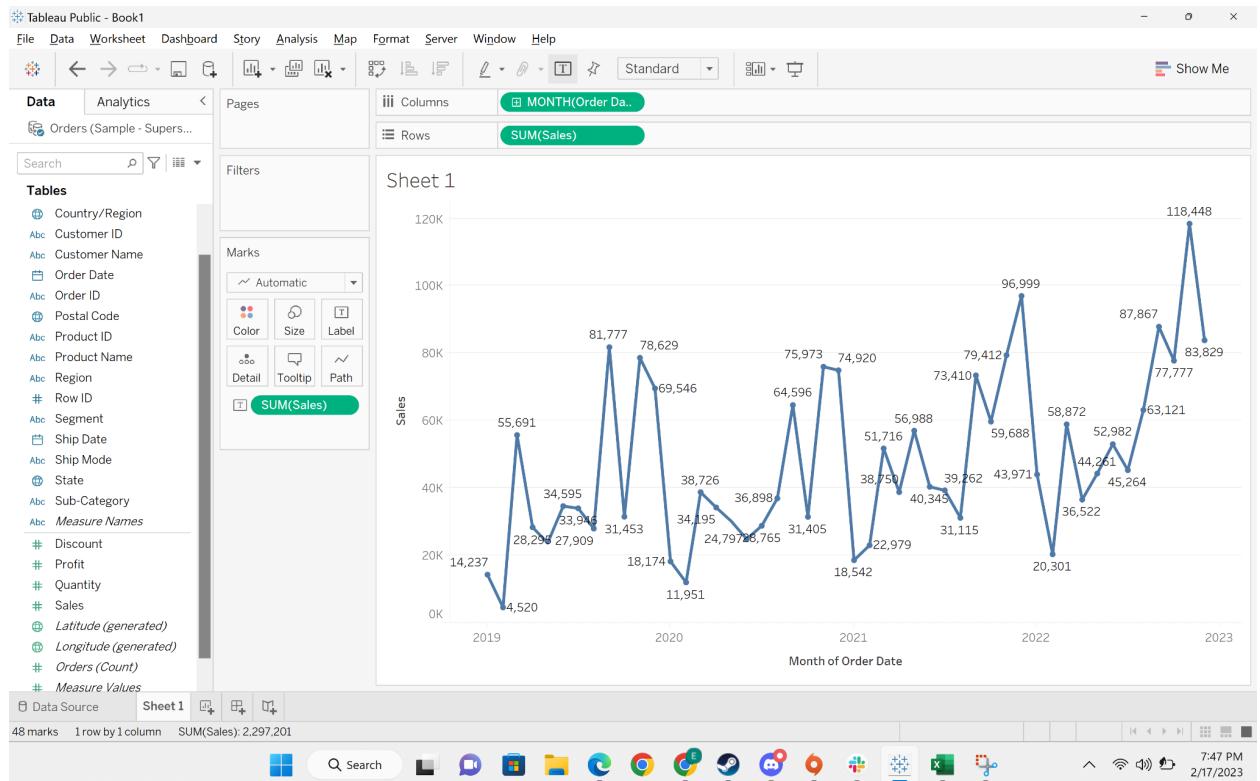


- Step-3: Change the ‘order date’ column from year to month-year

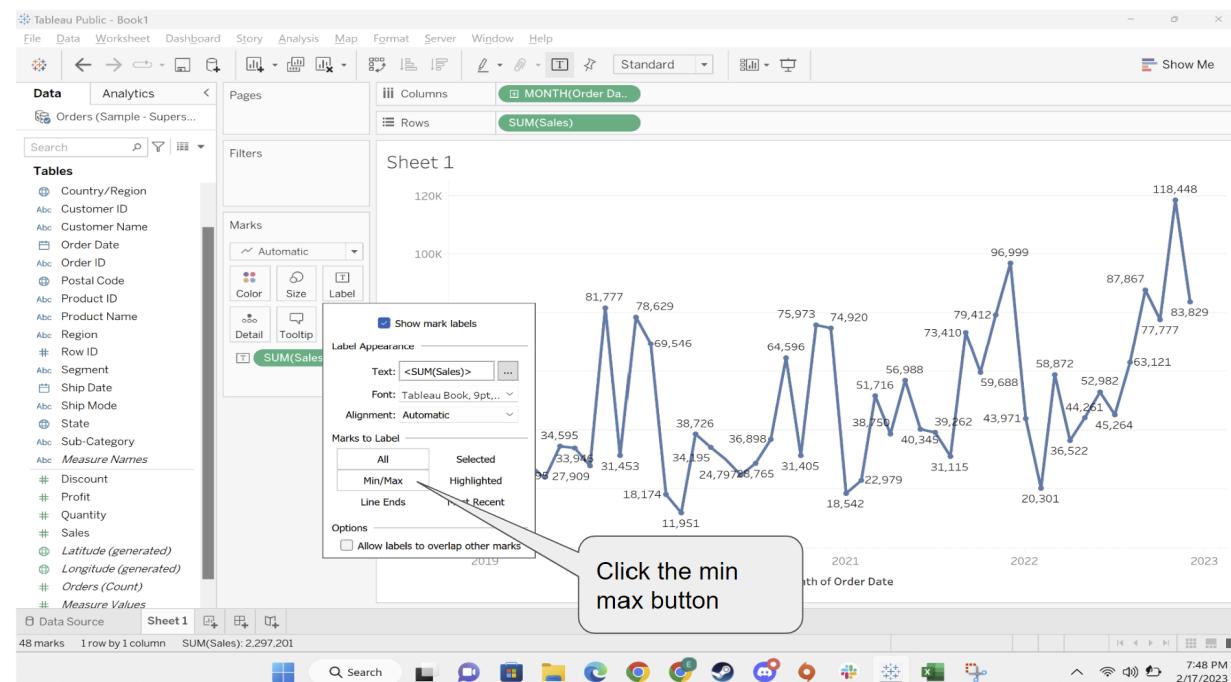


- Step-4: Drag the ‘sales’ measure to “Text” mark





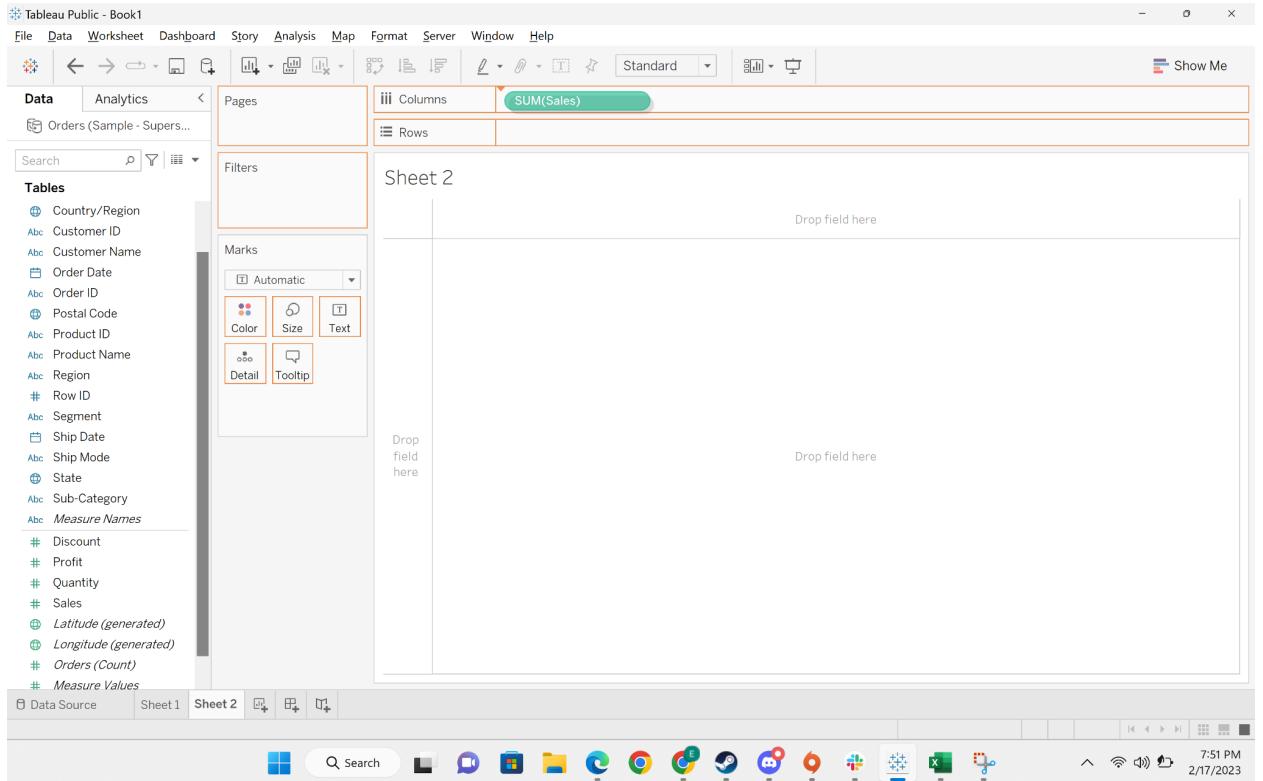
- Step-5: Click the text mark and select min/max



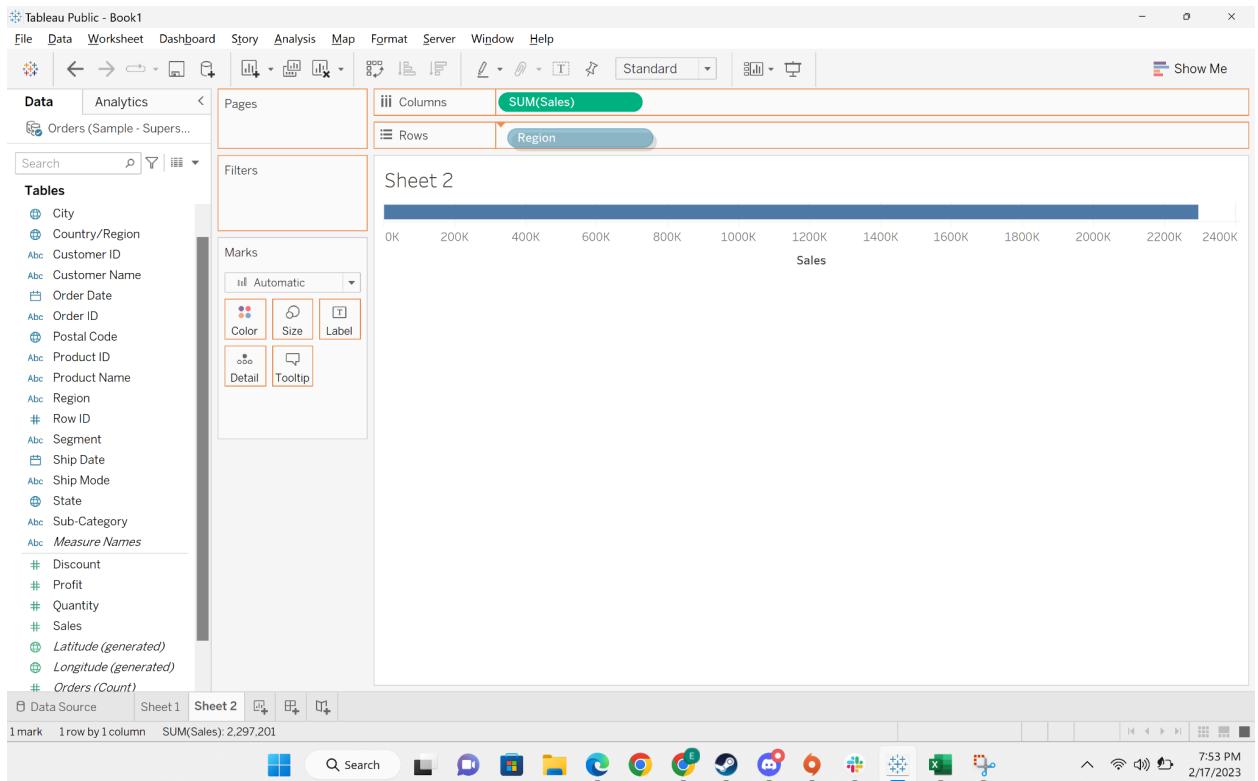
## Business problem 3: Find sales and profit by region for year 2016

Solution-3:

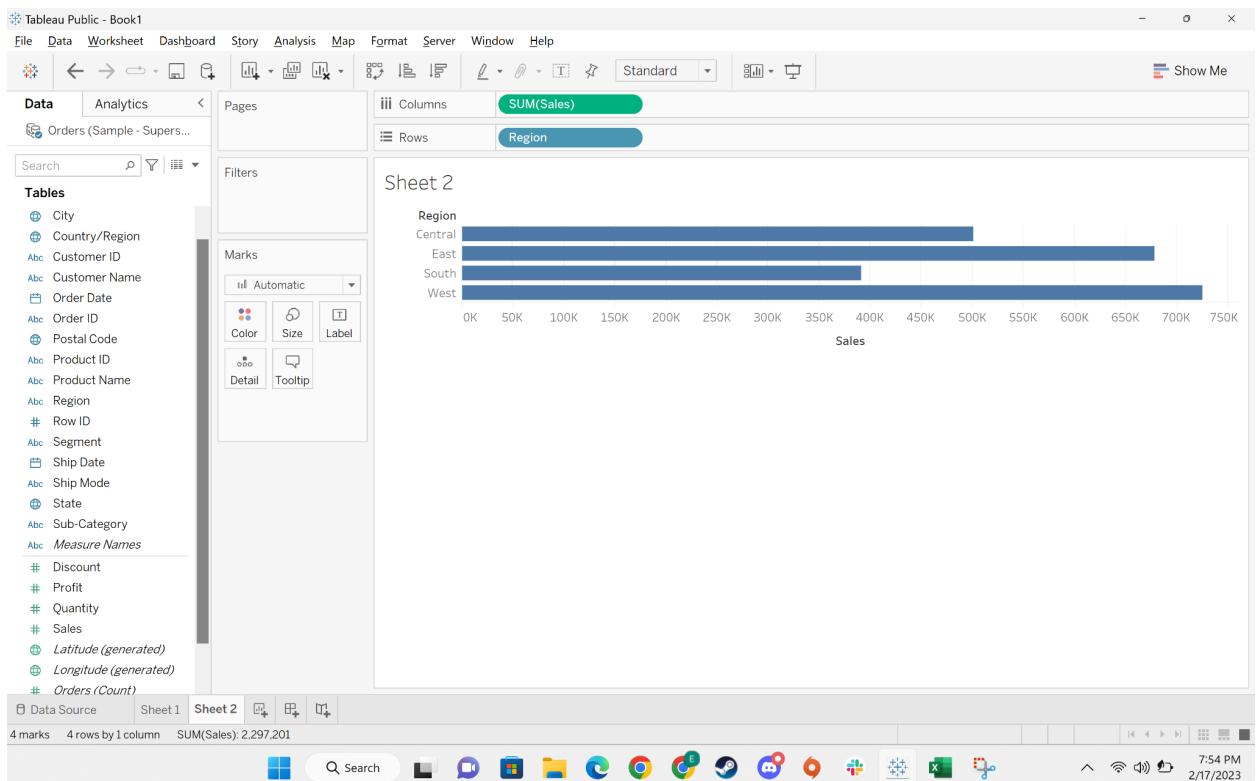
- **Step-1: Drag Sales to the columns**



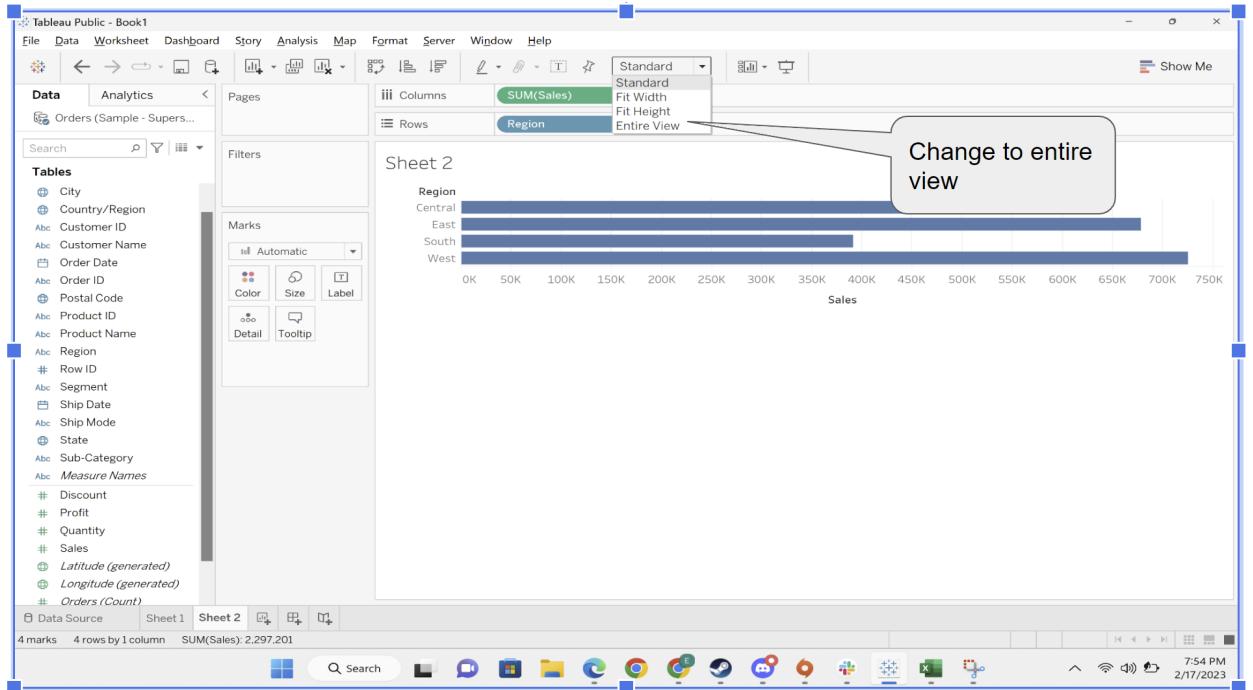
- **Drag region to rows**



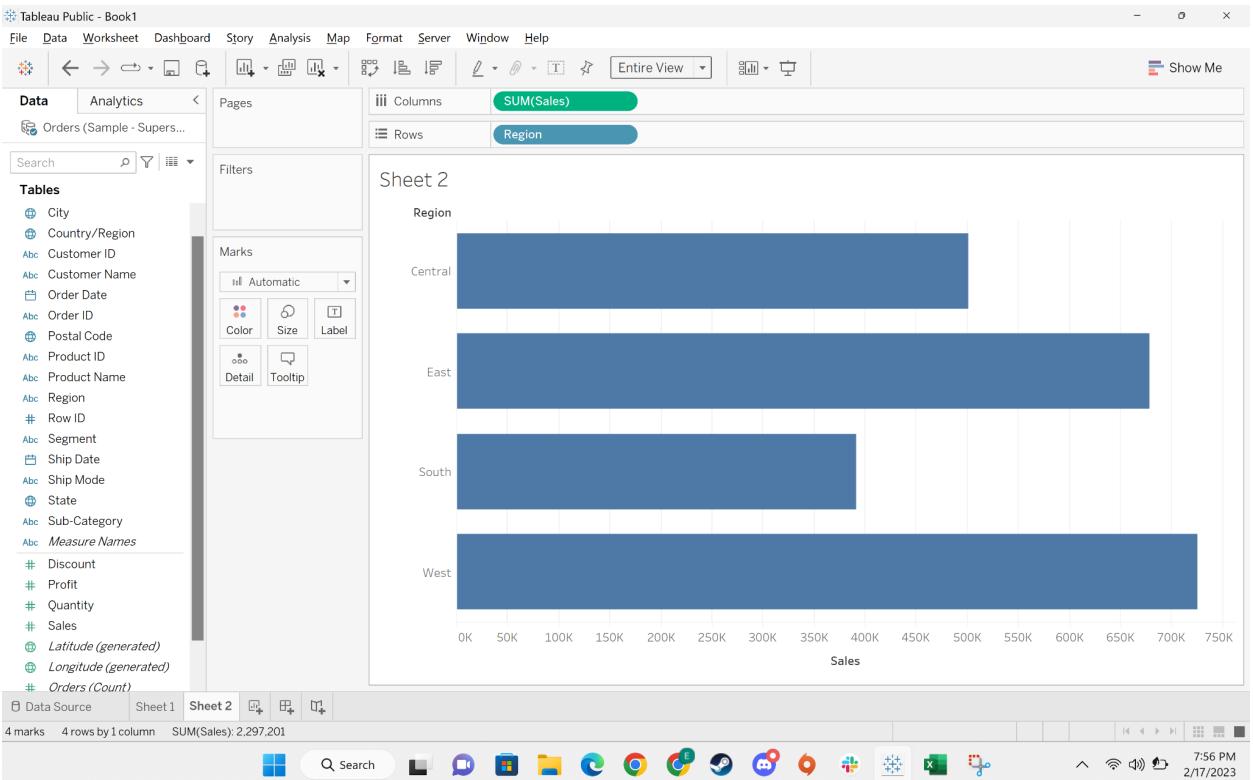
- Horizontal bar chart is created



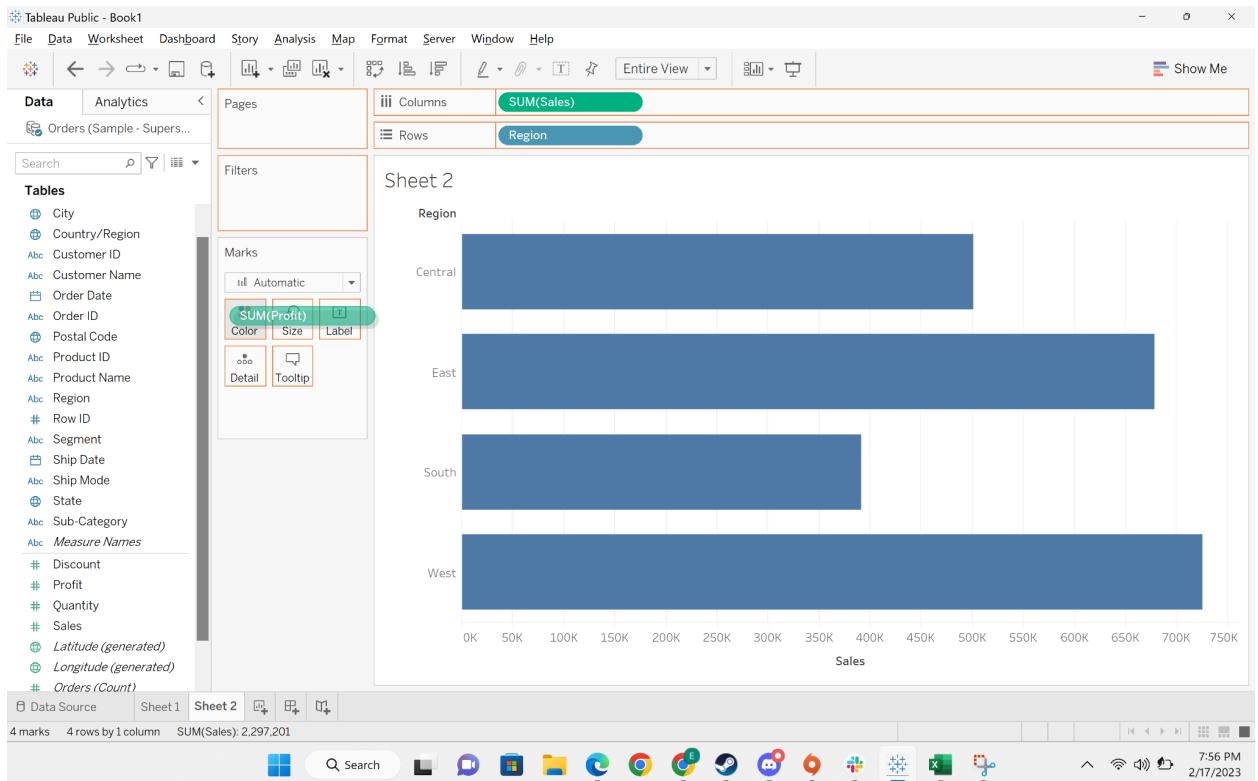
- Change to entire view



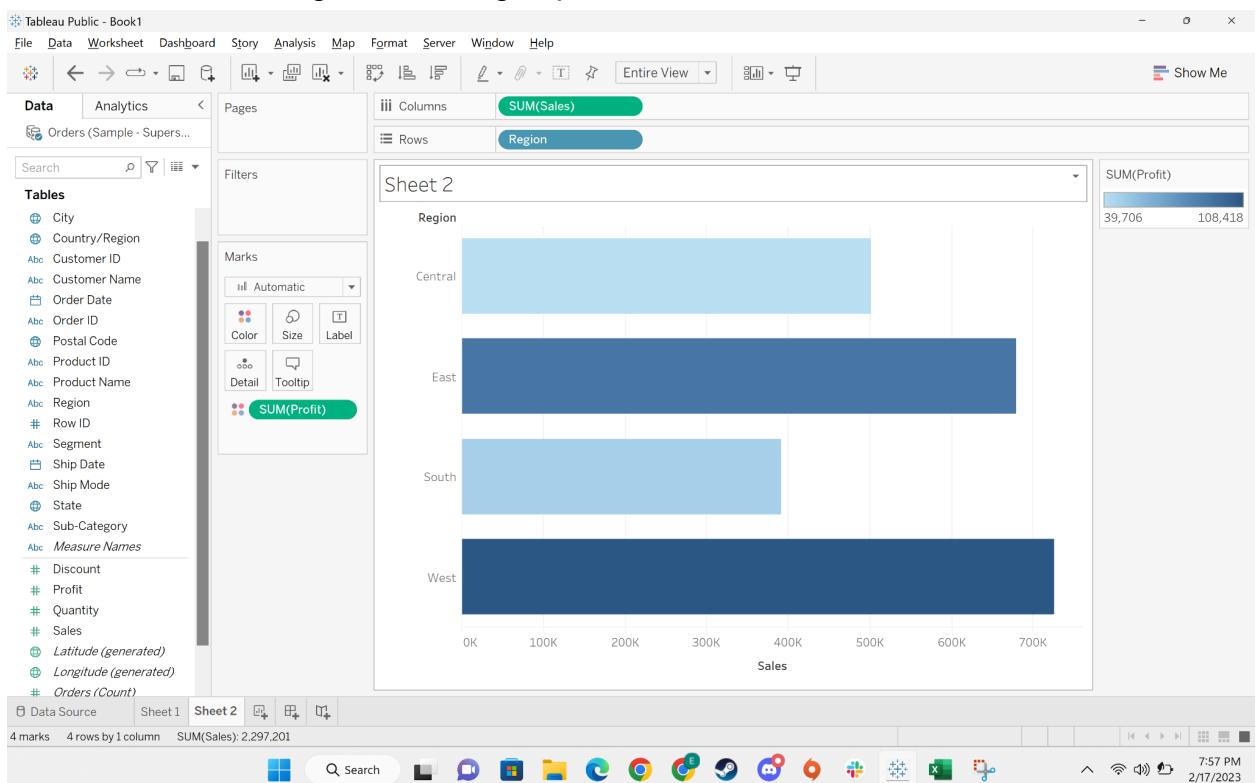
- Entire view



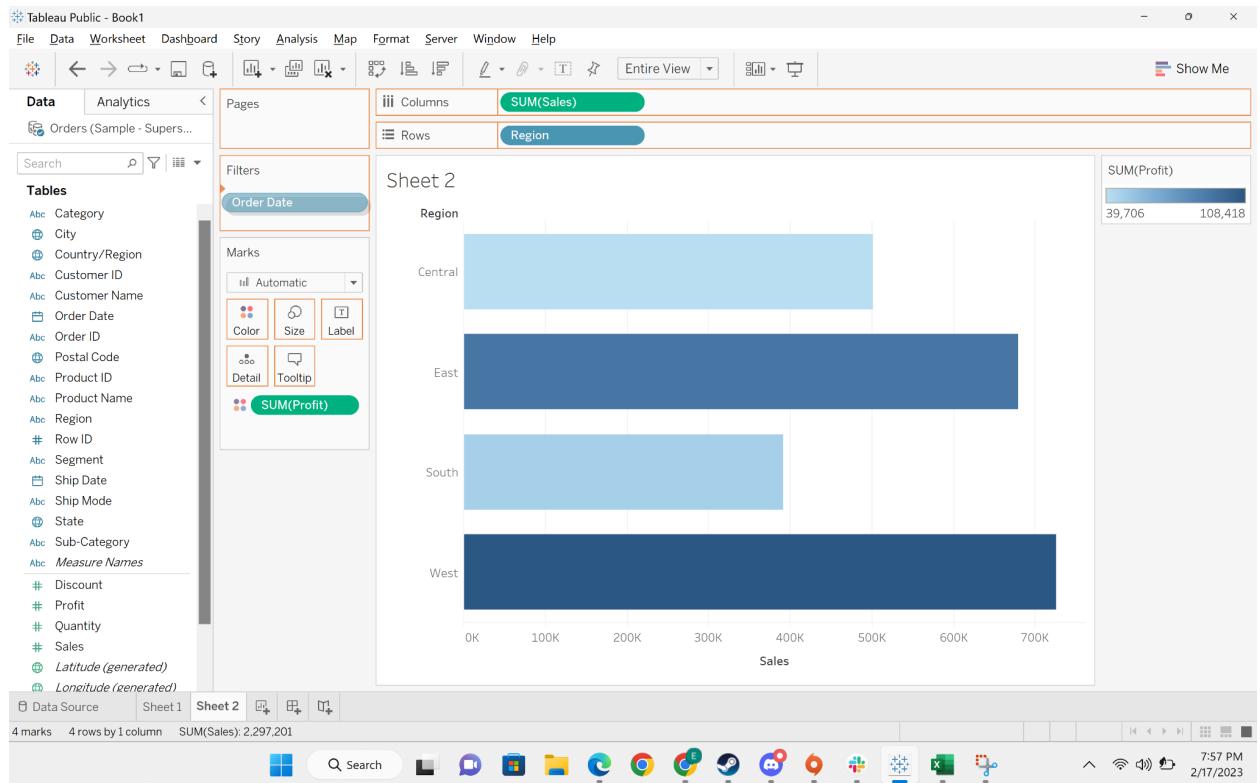
- Move profit to “color” mark



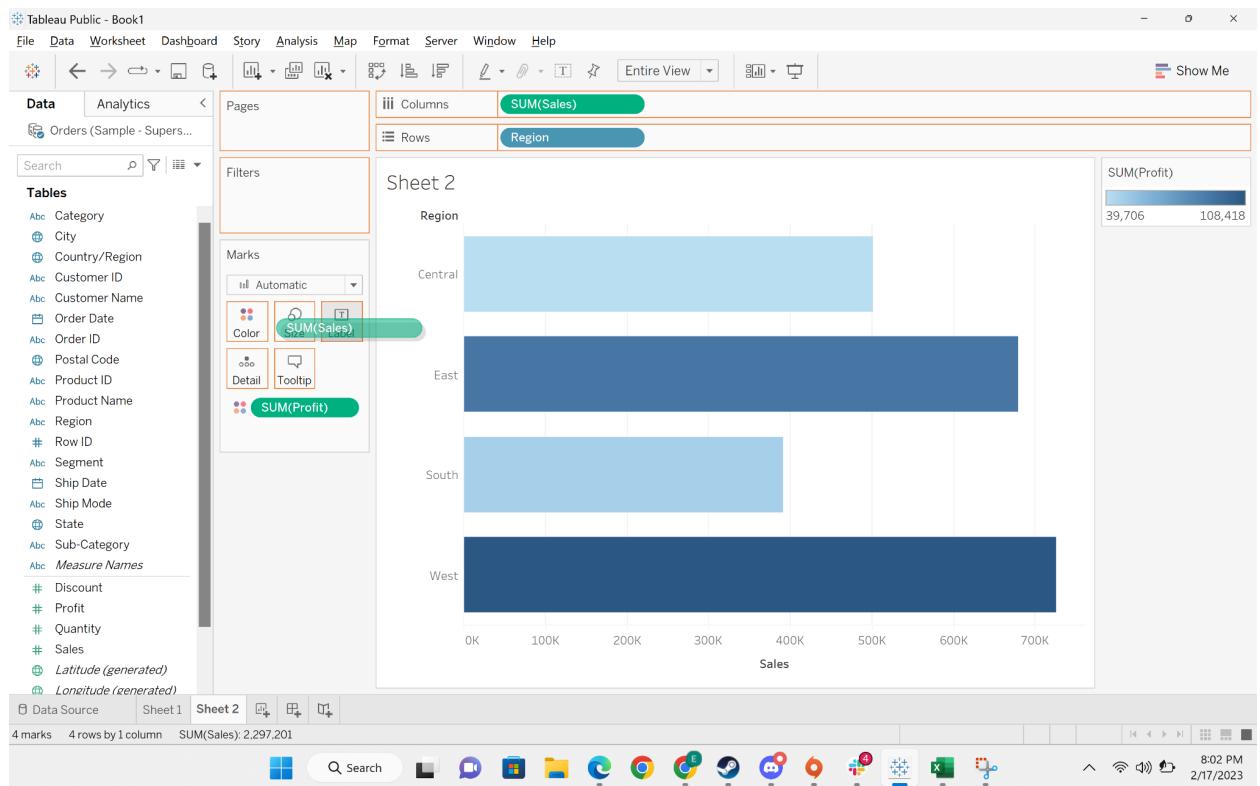
- Now bar color is changed according to profit

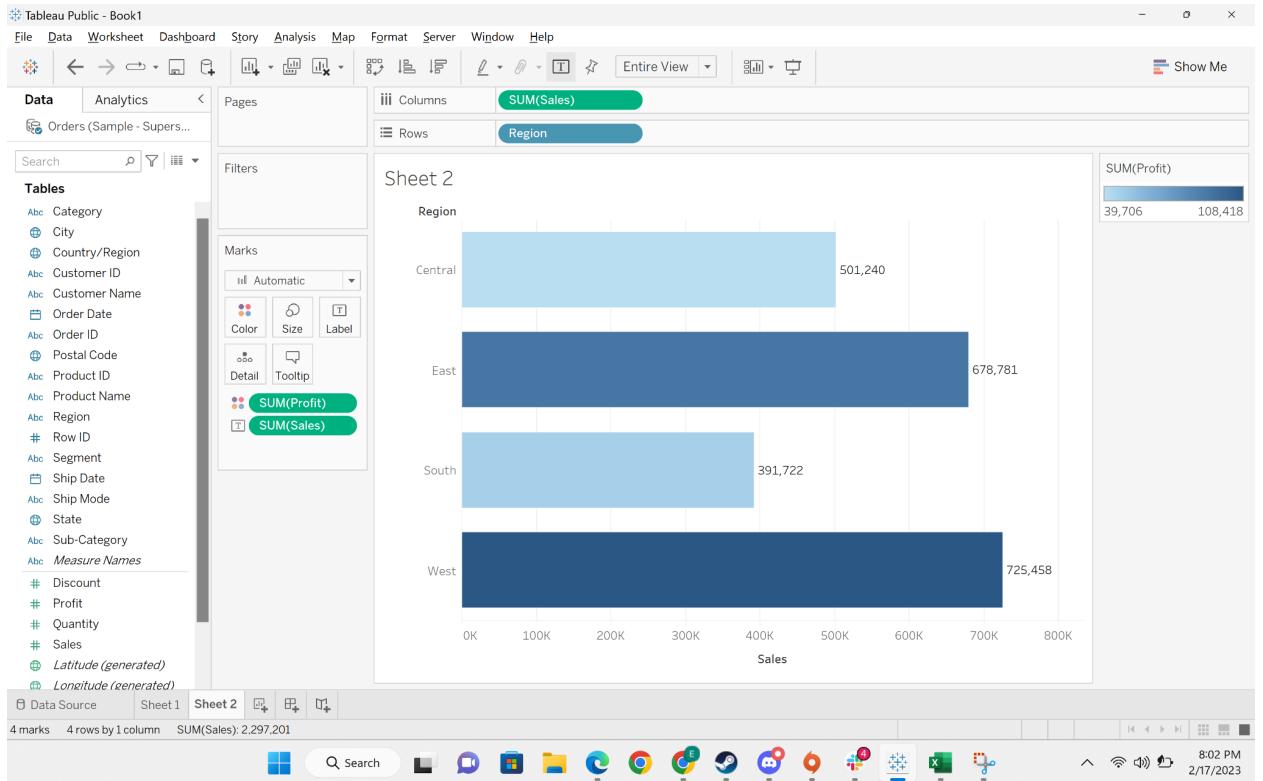


- Move "order date" to filter

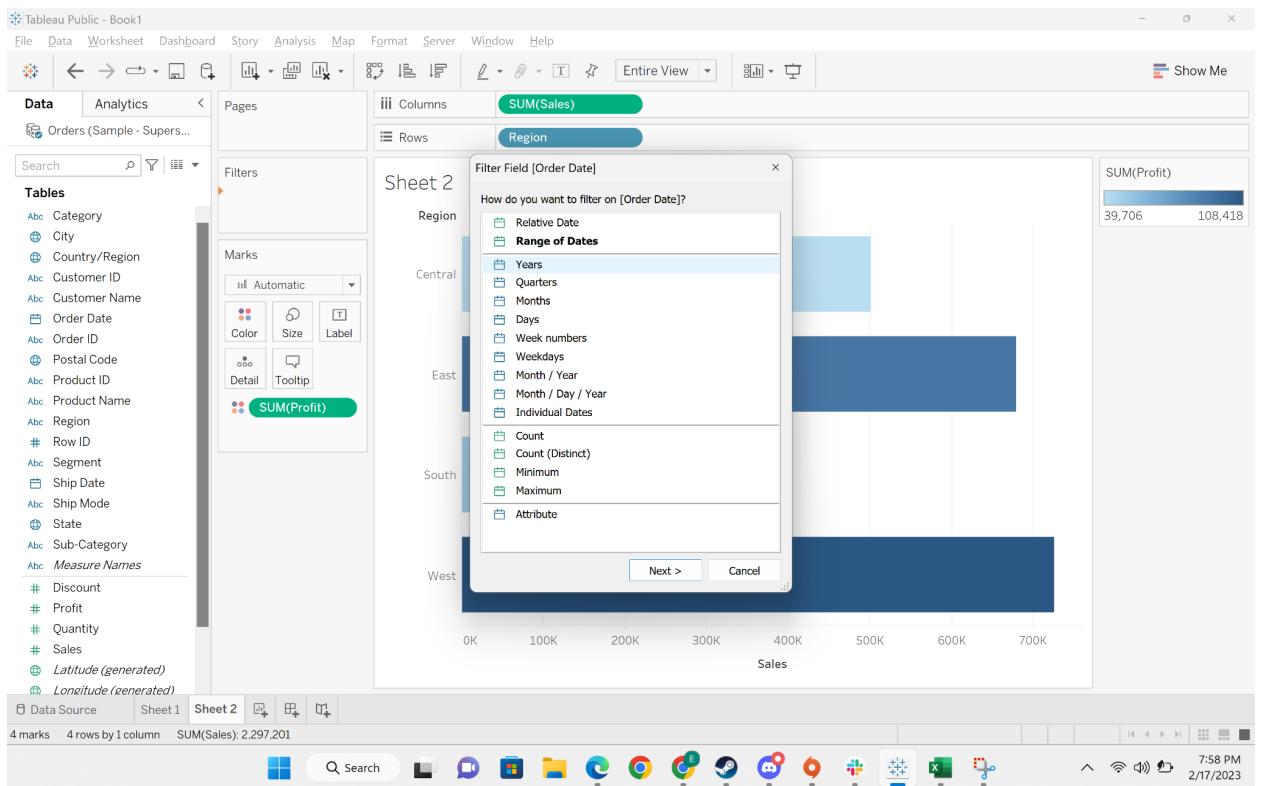


- Move “sales” to label

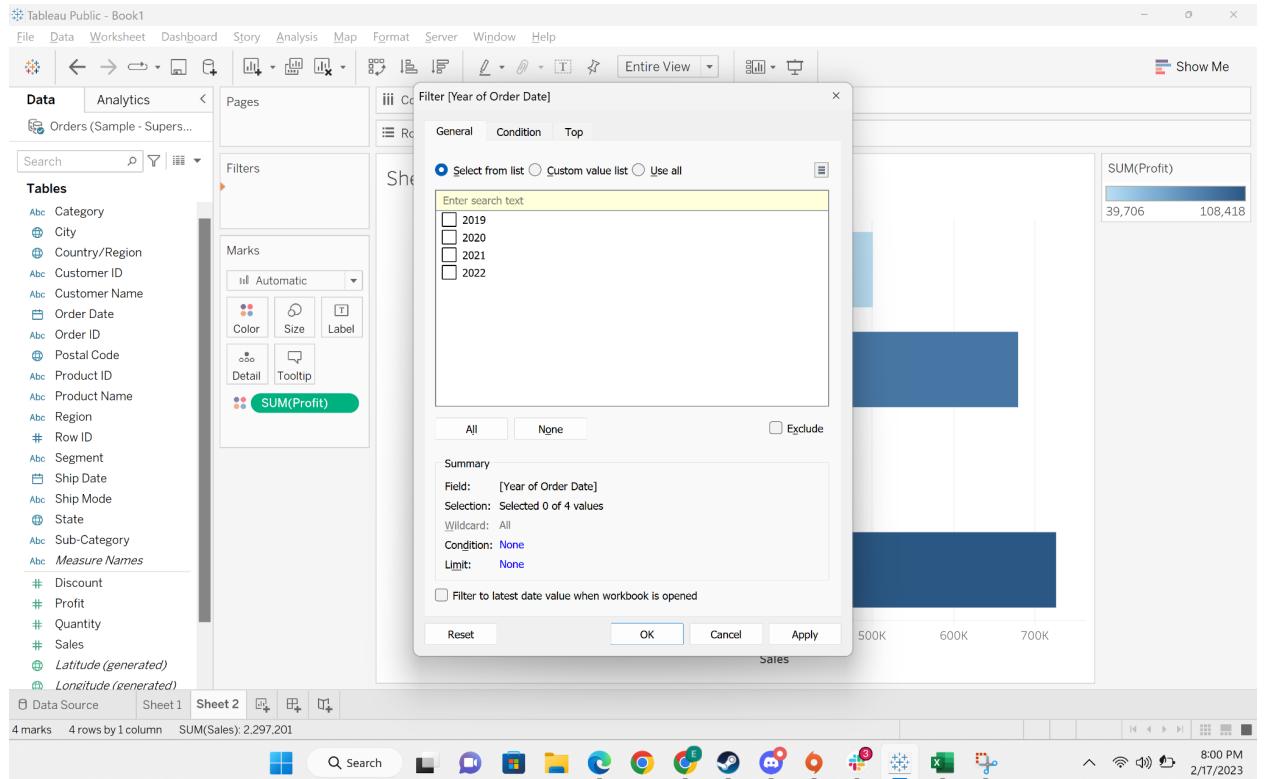




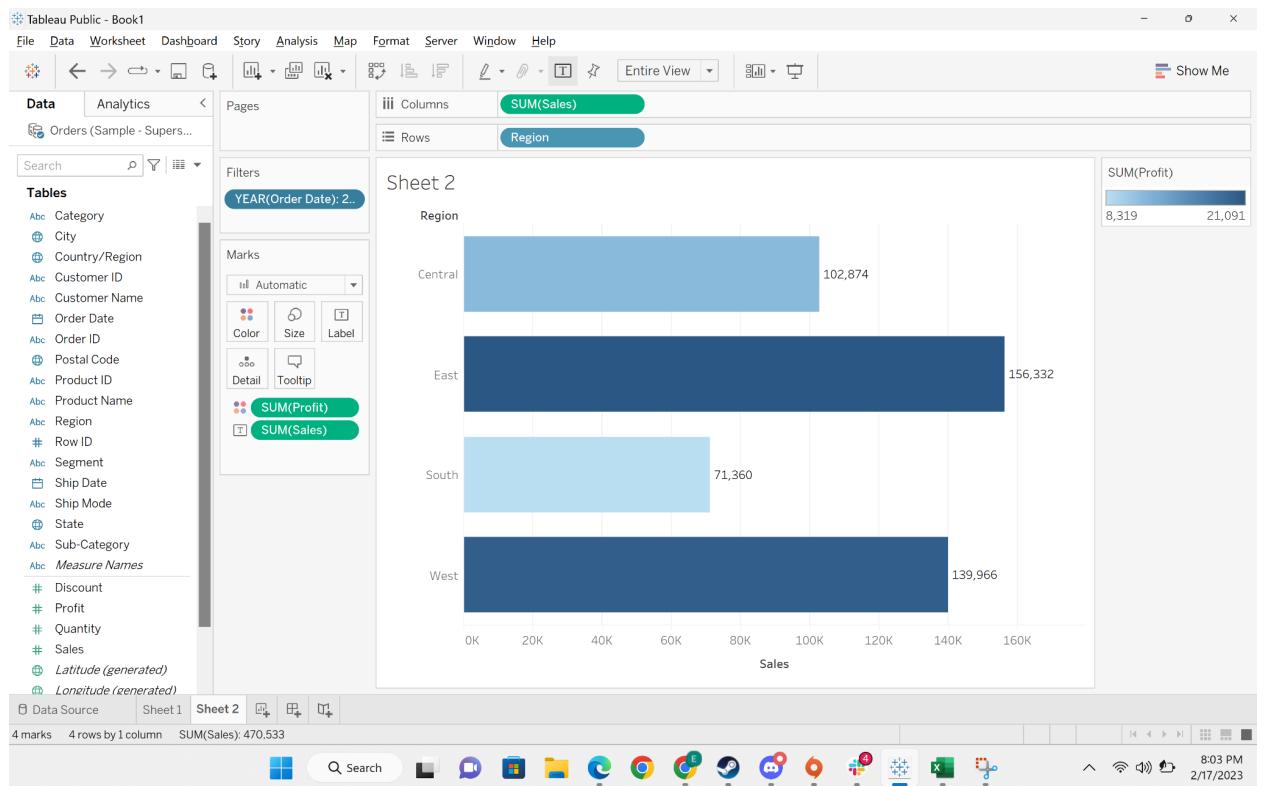
- Click on years and then next

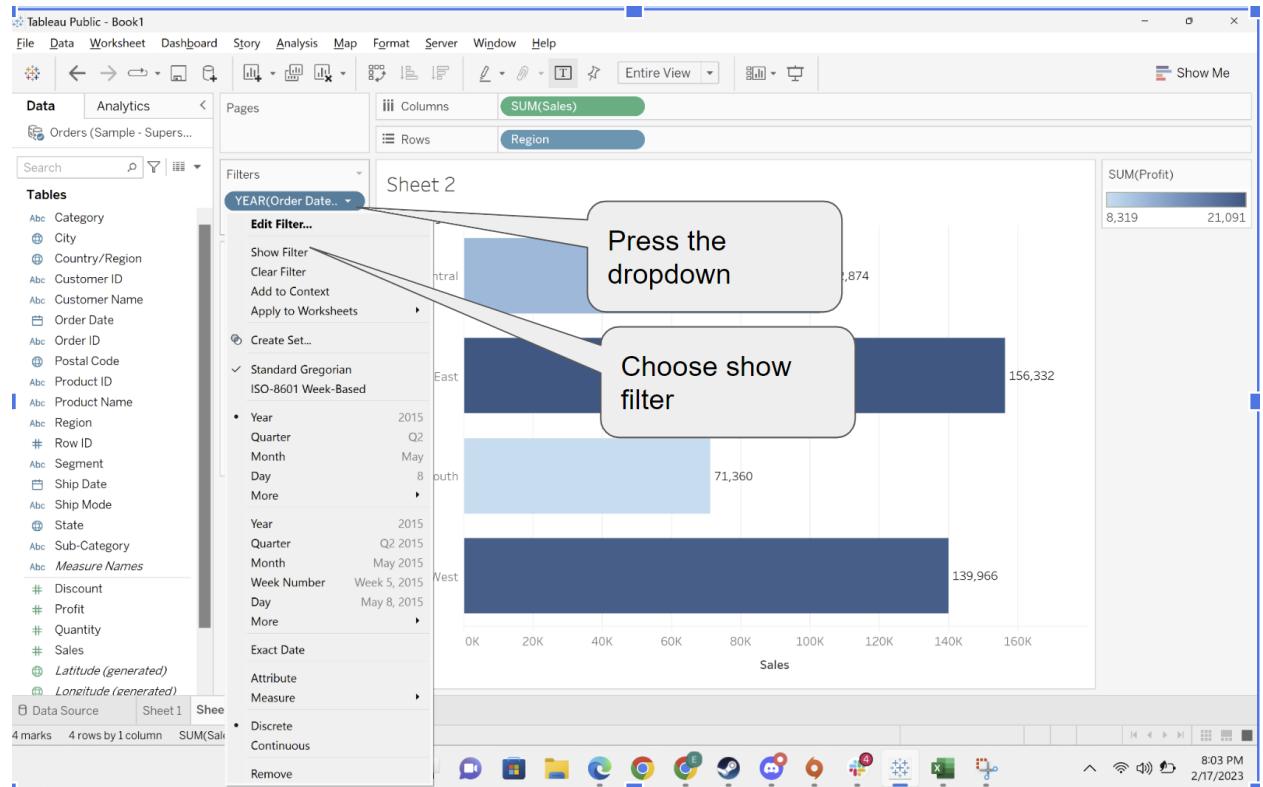


- Choose year 2020 and press apply



- Data is filtered for 2020

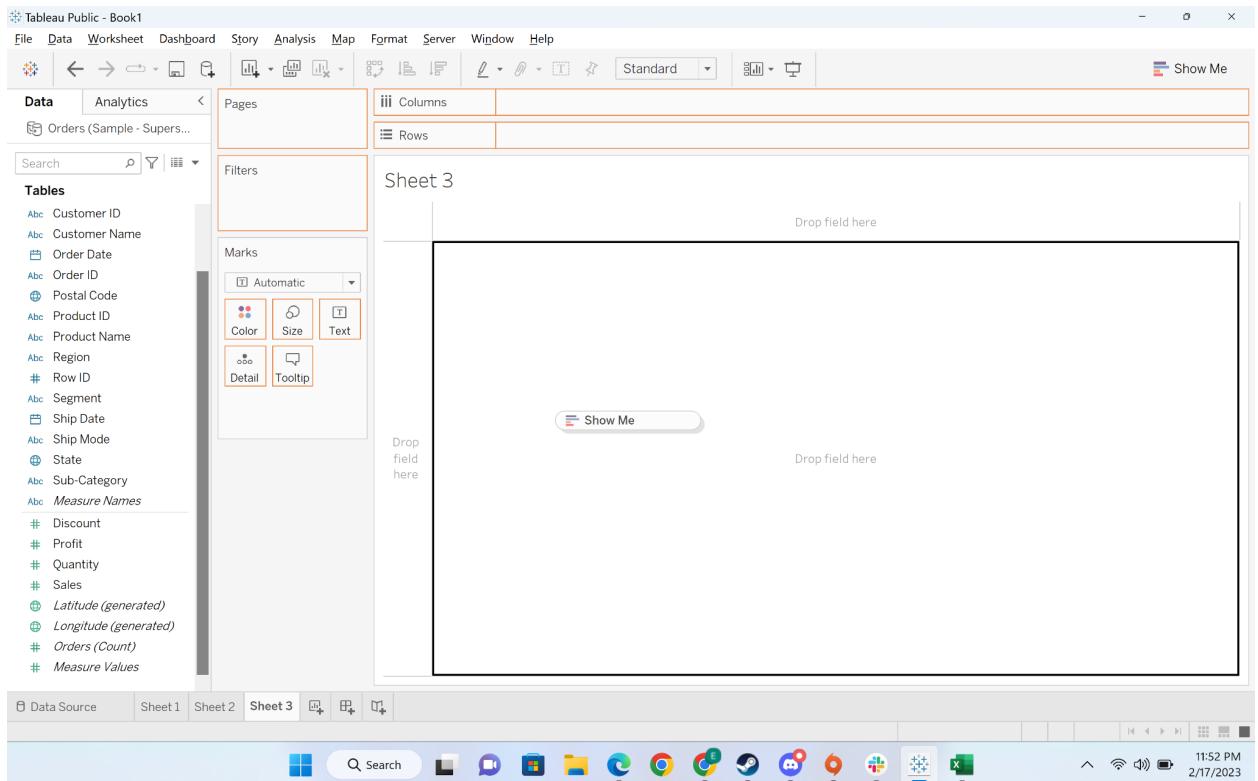




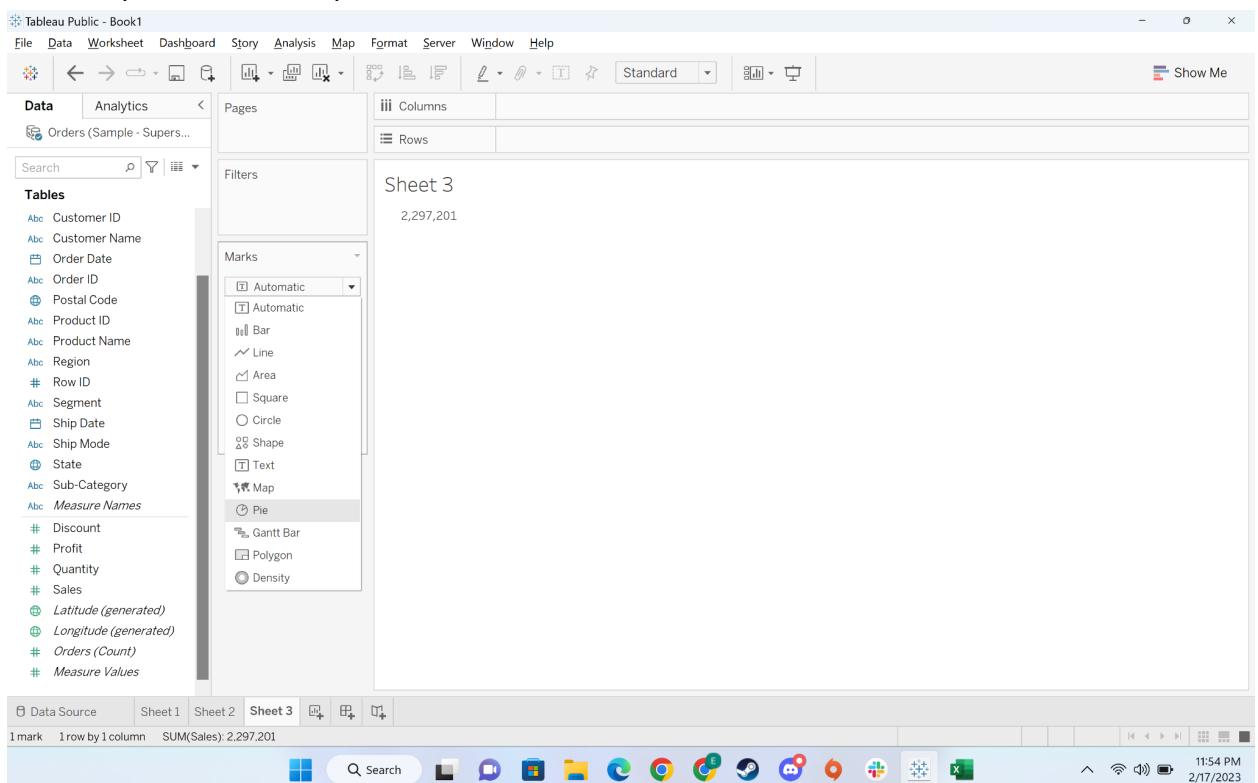
Business problem 4 : Show relative percentage of sales and profit by region for the year 2016

Solution-4:

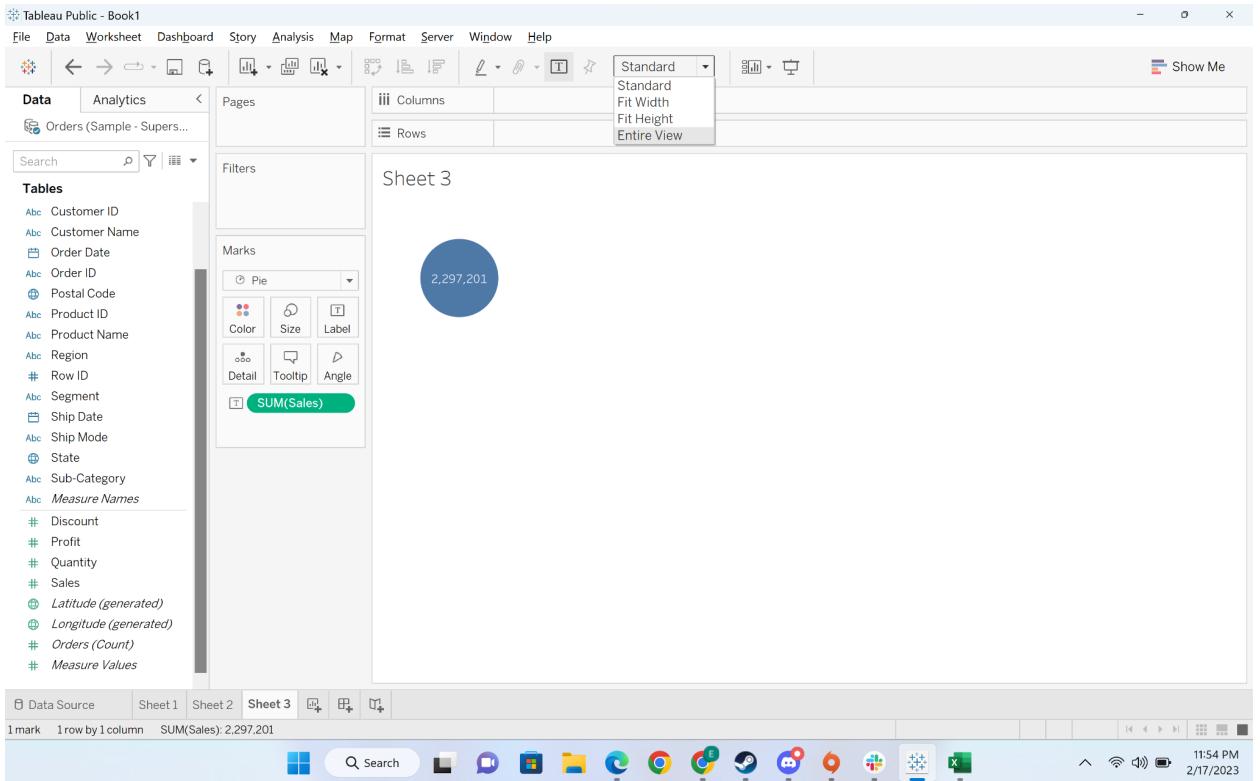
- Drag 'sales' field to the sheet



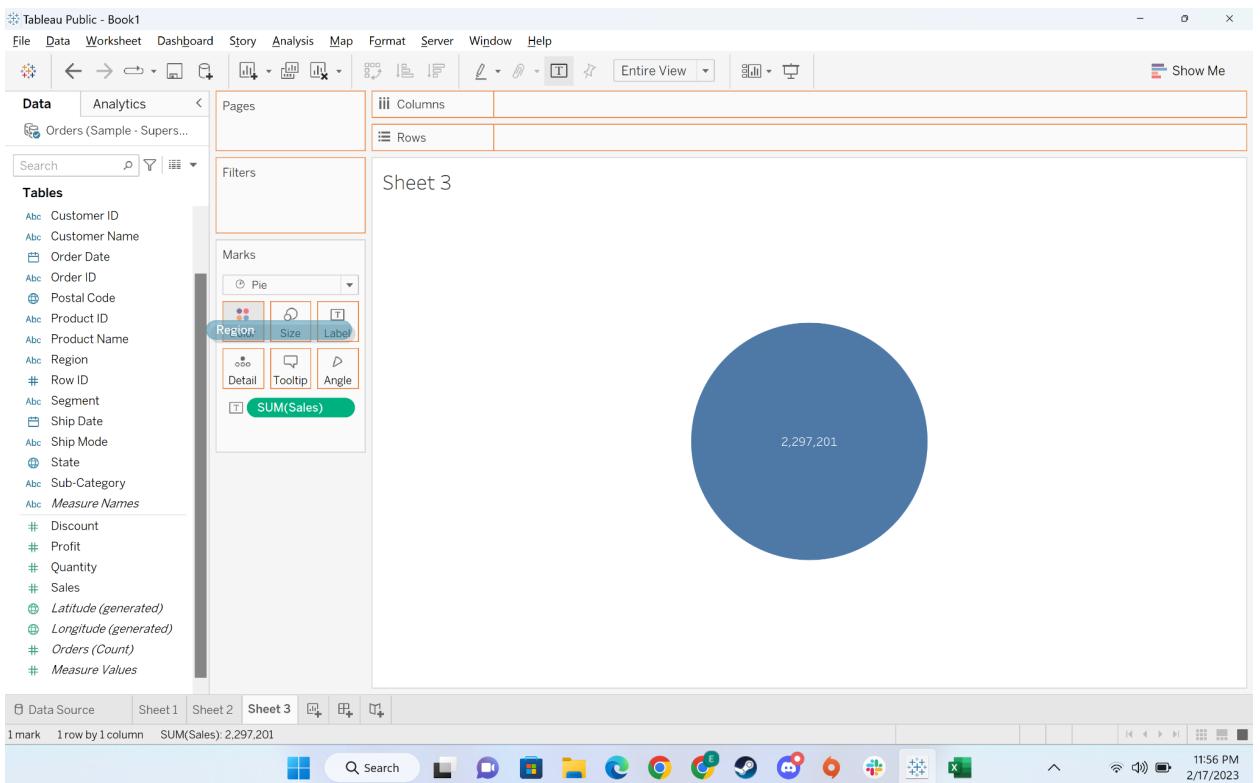
- Choose “pie” from Marks panel.



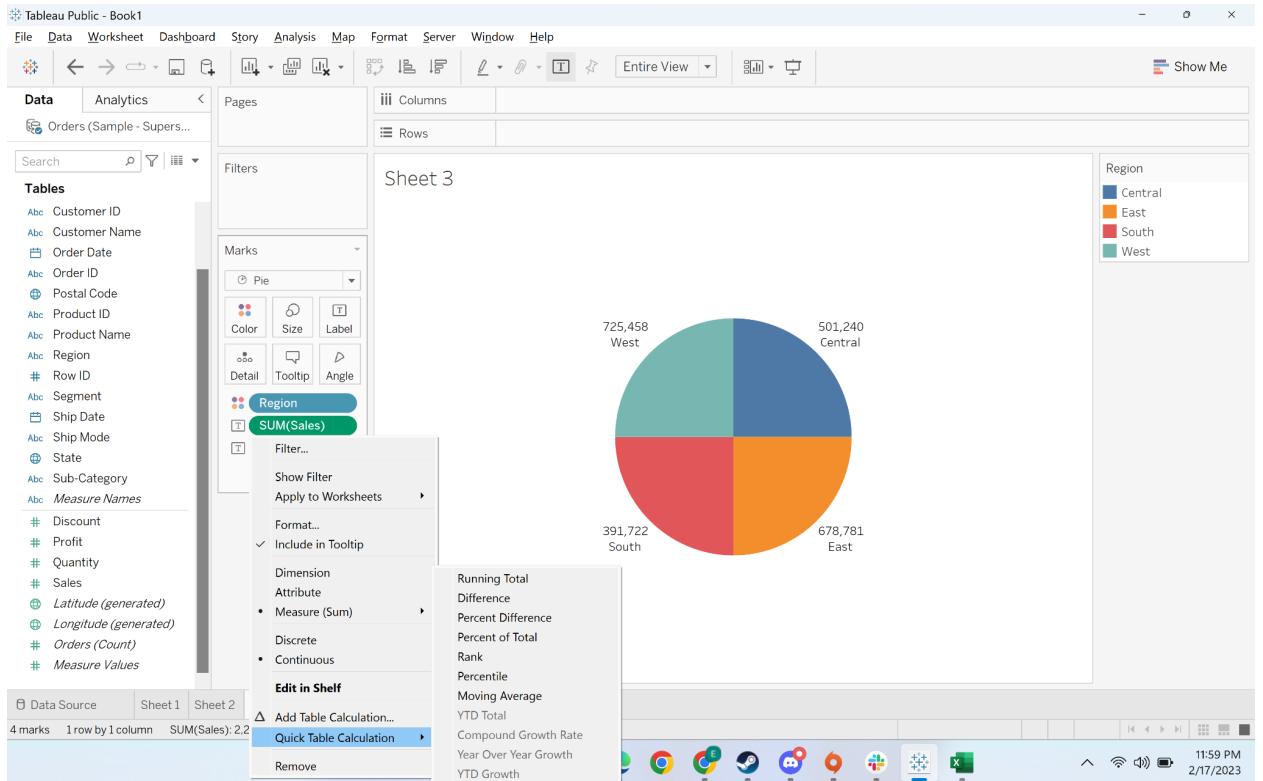
- Change to ‘entire view’



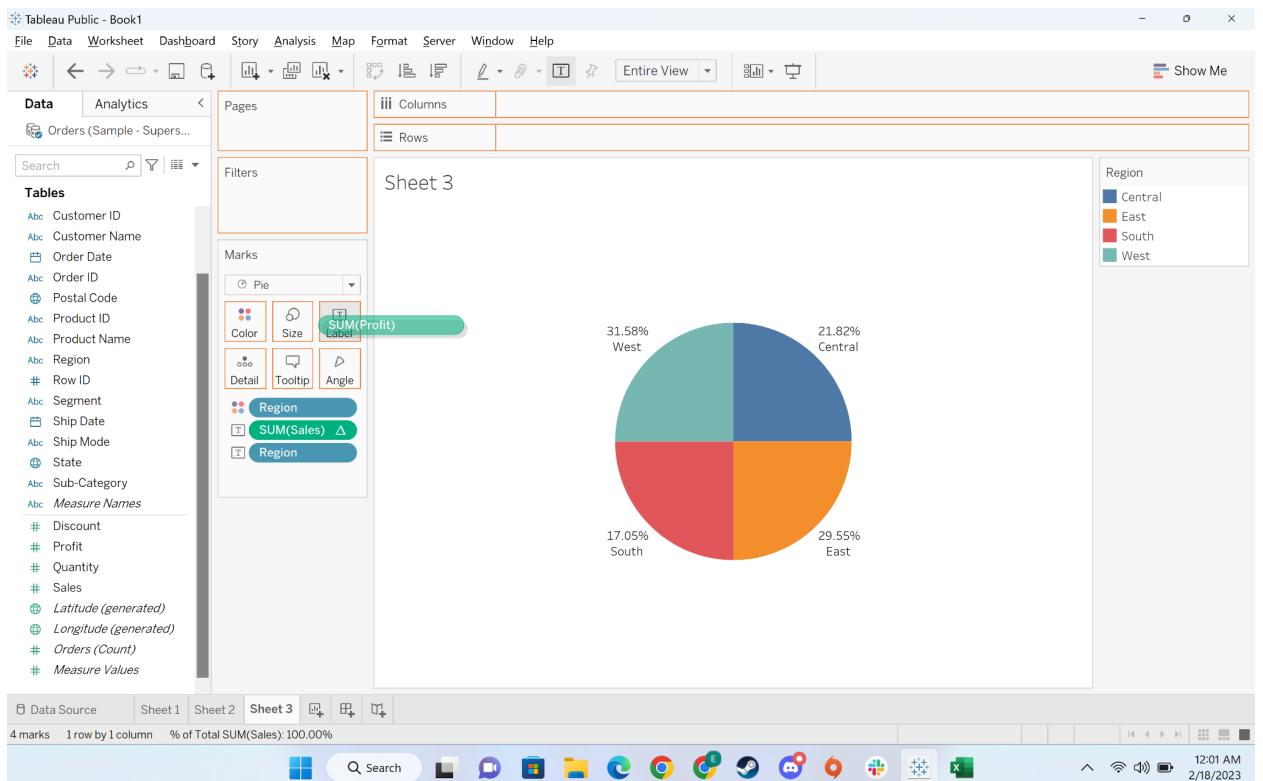
- Move the “region” to the color and label



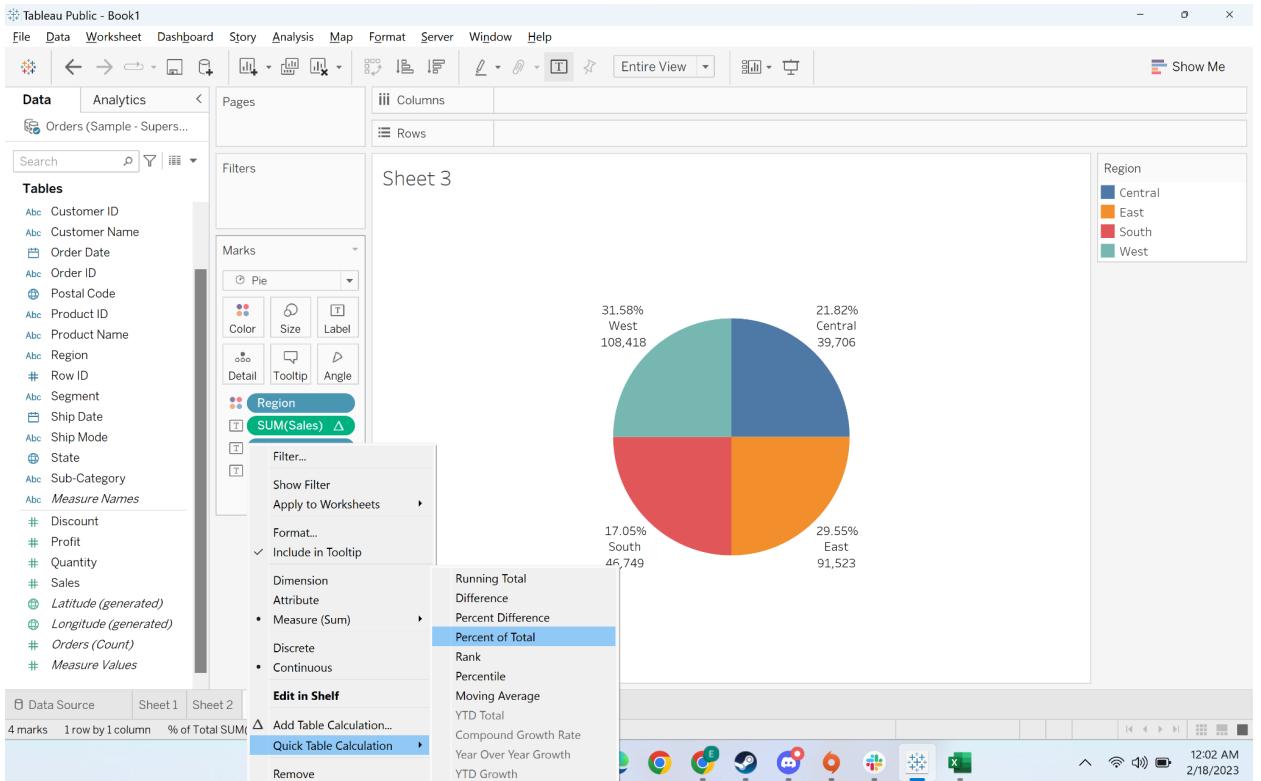
- Use the “quick table calculation” and choose “percent of total”to calculate the percentage share



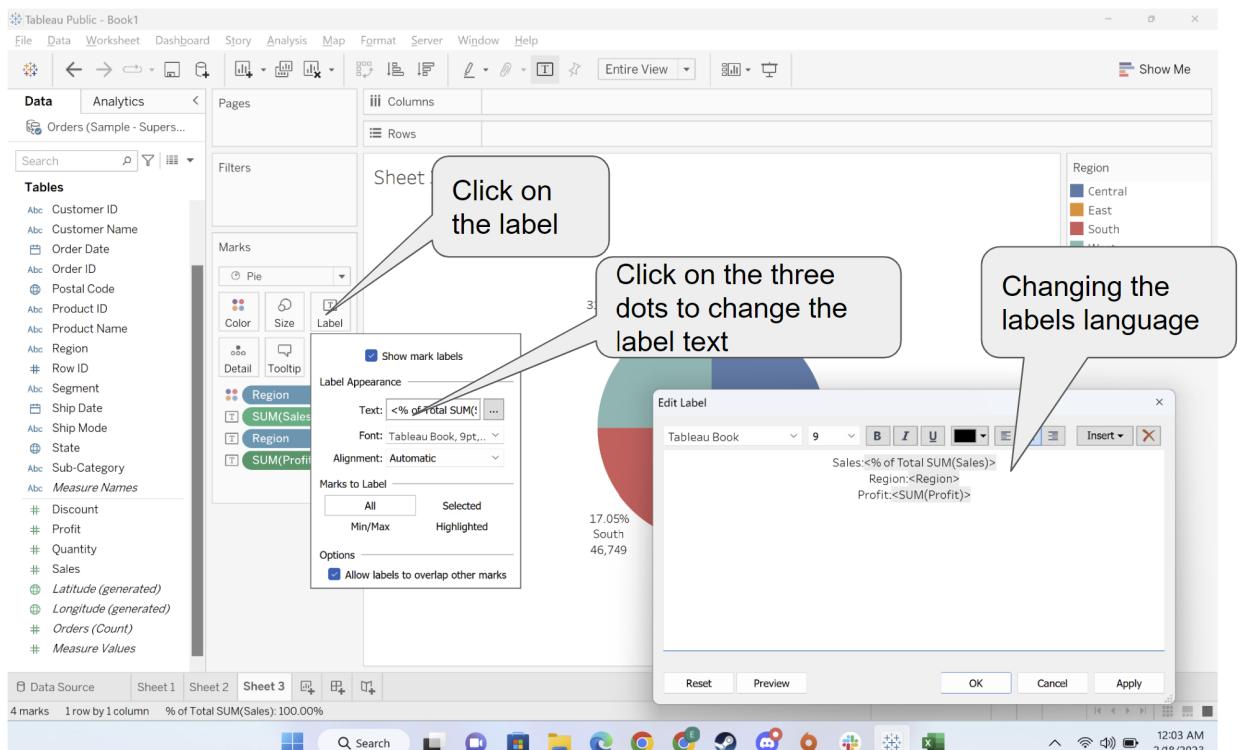
- Move the 'Profit' to labels



- Convert the profit into percentage of total



- Change the language for labels



- Add the filter for year 2020

Business problem 5-Display sales and profit for each subcategories by region for all the years in a table format

- **Business Context**

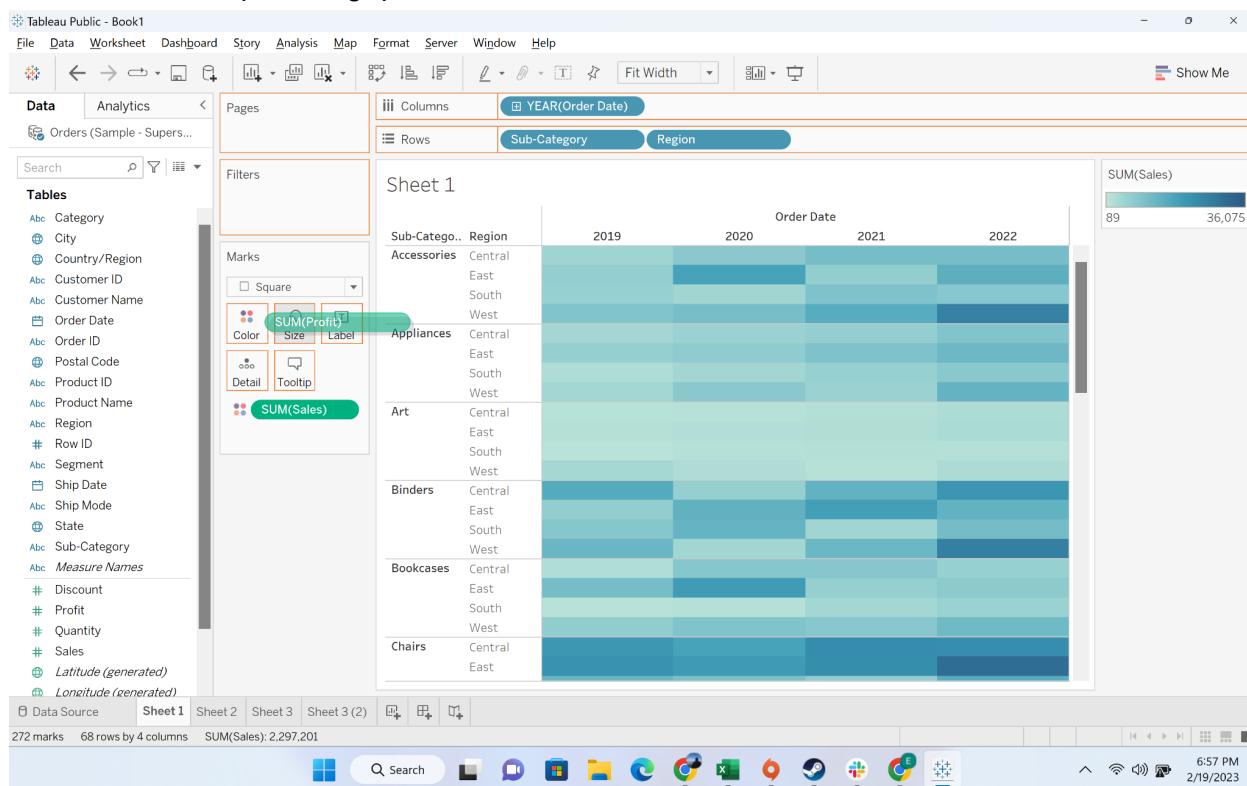
- In most of the business reports, we need to present more than metric. For example, most of the sales managers are interested to know both sales and profit for the region. They want to drive revenue as well as profit. Similarly, most of the new business divisions(for example cloud businesses) are generating revenue, but do not make profit. We have to generate reports which help in quick identification of these

- **Intro to heatmap table:**

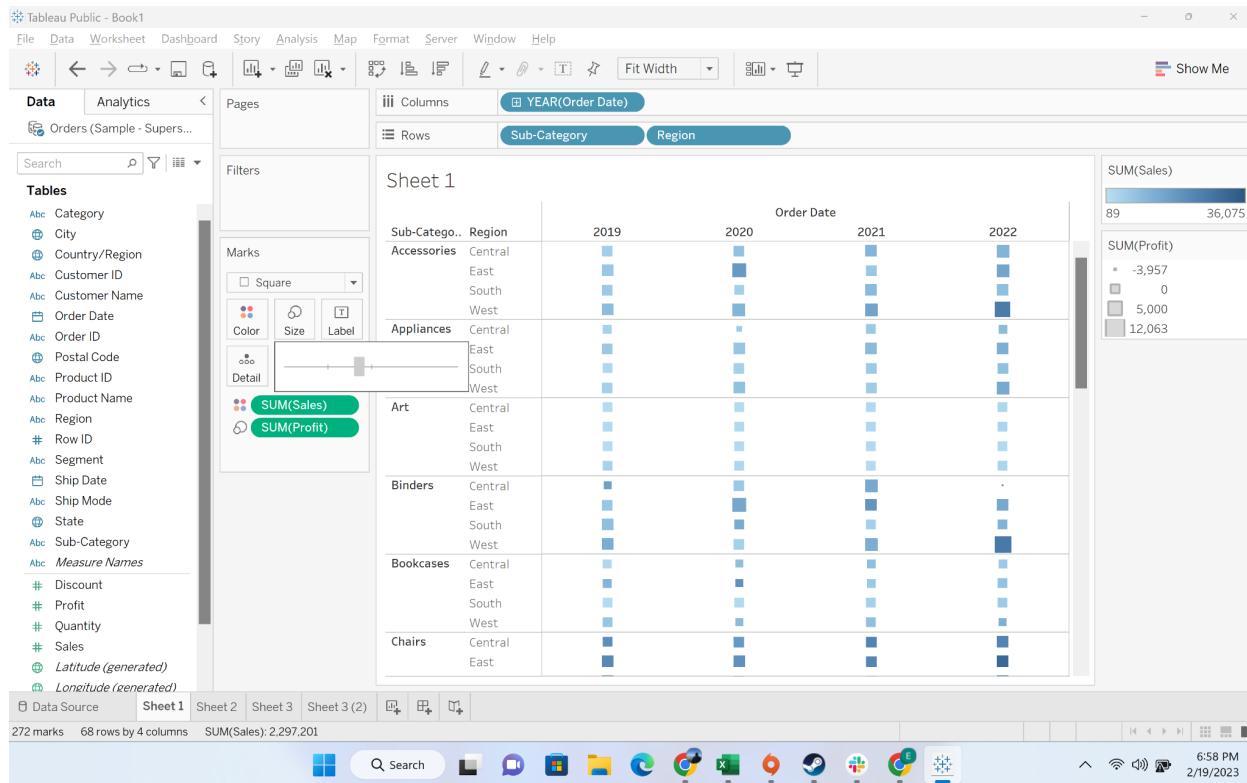
- Highlight tables allow us **to show relationships across multiple dimensions and one or more measure**
- Heatmaps present patterns, trends, and relationships within the data. They use color and size from two on the same or different measures.

- **Demonstration of creating a heatmap**

- Step-1: We will continue with the visualization we have created in the previous question
- Step-2: Drag “profit” to size



- Step-3: increase the size



- Step-4: Output. Color represents the sales. Lighter the color, lesser the sale. Size of the square represents the profit. Larger the square, bigger the profit

