

Exp. No: 8

Interactive Dashboard with Tableau

AIM:

To create a tableau dashboard that integrates with Google sheet.

PROCEDURE:

1. Prepare your Dataset (Superstore)
loader Data / Catalog / Market / Region /

Sales / Profit / Quantity / Customer Name

2. Connect your data

- * Open Tableau desktop

- * Click "Connect" → Microsoft Excel

- * Choose your file → drag our main data

3. Create calculation:

YTD sales

if year ([order date]) = YEAR(TODAY())

THEN [sales] END

PYTD sales

if YEAR([order date]) = YEAR(TODAY()) - 1

THEN [SALES] END

Growth %

$$\frac{(\text{sum}[\text{YTD sales}] - \text{sum}[\text{PYTD sales}])}{\text{sum}[\text{PYTD sales}]}$$

4. Sales KPI → Create a card showing total sales % vpy, and a trend line using order date & sales.
5. Profit KPI - Duplicate sales KPI & change to profit
6. Market share (Market on color, sum(sales) on Angle → show % Total)
7. Category wise YTD vs PYTD Bar chart → category on YTD PYTD sales on columns → side bars.
8. Customer Acquisition chart → Month (month of date) on columns, count(customer Name) on Rows, Market on color
9. Add filters → Add Market, year or segment
filters: enable use as filter for interesting.

RESULT:

Thus the program to create a dashboard using tableau is created and executed successfully.