

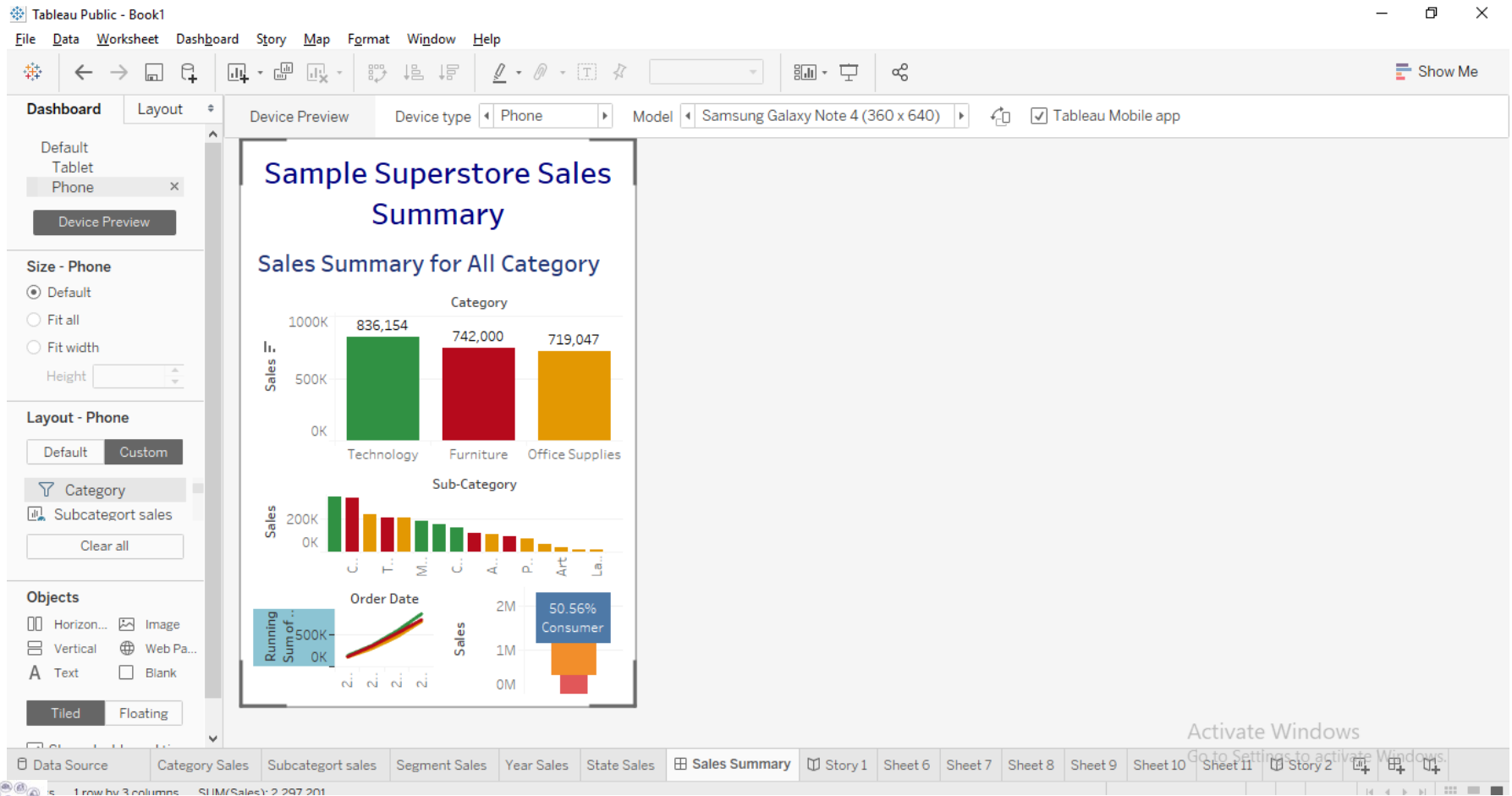
# Dashboard Actions

- 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

Category	Sales
Technology	836,154
Furniture	742,000

### Region Birfaction for All Category

West 31.58% Centre 21.82% East 29.5% South 17.05%

### 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

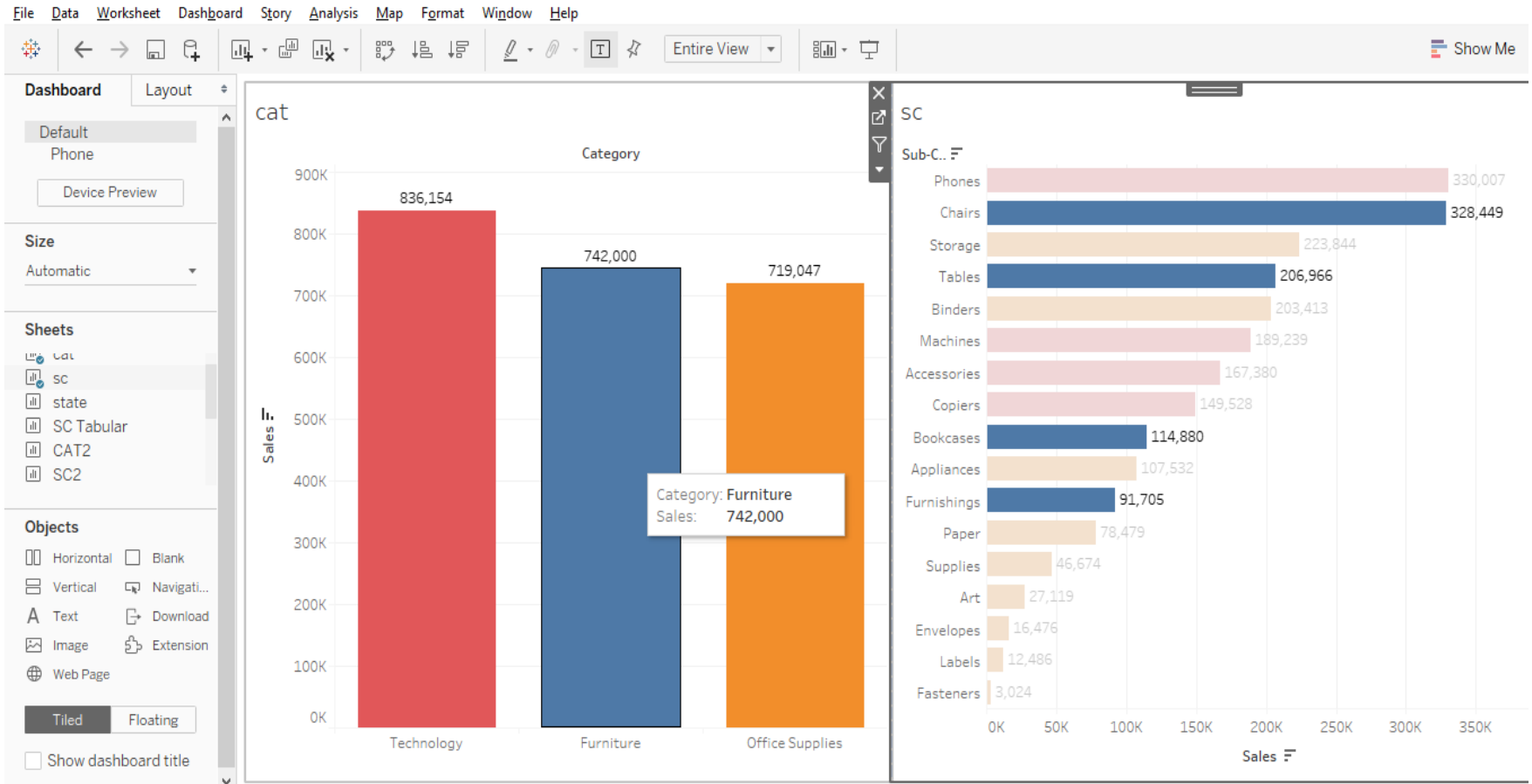
OK Cancel

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 data for various states and the District of Columbia. The map is color-coded by state, with California highlighted in dark blue. Population values are displayed for each state and the District of Columbia.

State/DC	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
Alabama	2,865
Georgia	2,865
South Carolina	8,482
North Carolina	32,115
Virginia	32,115
West Virginia	32,115
Delaware	32,115
Connecticut	32,115
Massachusetts	32,115
New Hampshire	7,293
District of Columbia	2,865

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## California

From Wikipedia, the free encyclopedia Coordinates: 37°N 120°W﻿ / ﻿37°N 120°W﻿ / 37; -120

*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

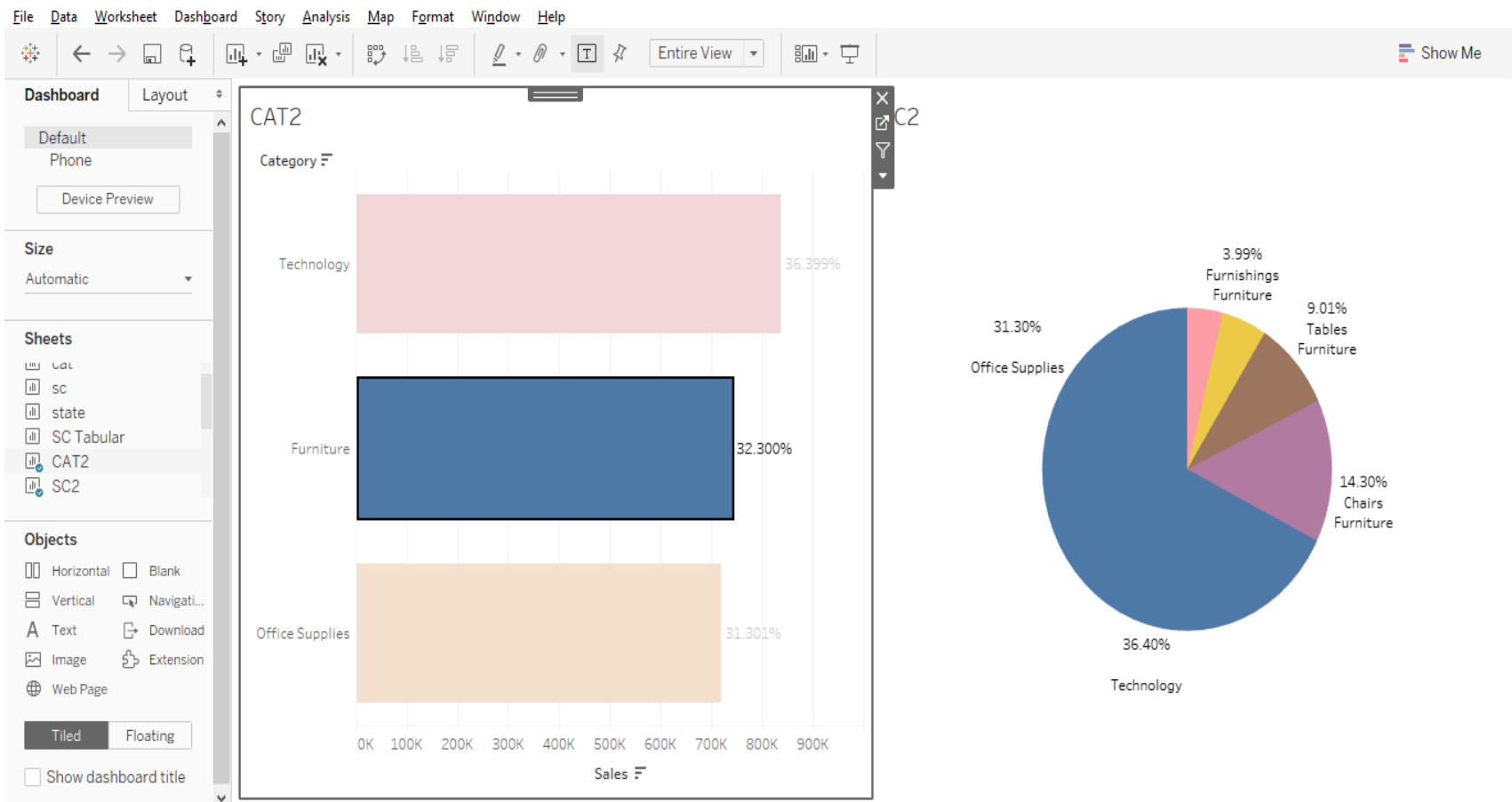
Nickname(s): Golden State<sup>[1]</sup>  
Motto(s): "Eureka"<sup>[2]</sup>  
Anthem: "I Love You, California"

0:00 CC MENU

Map of the United States showing California highlighted in red.

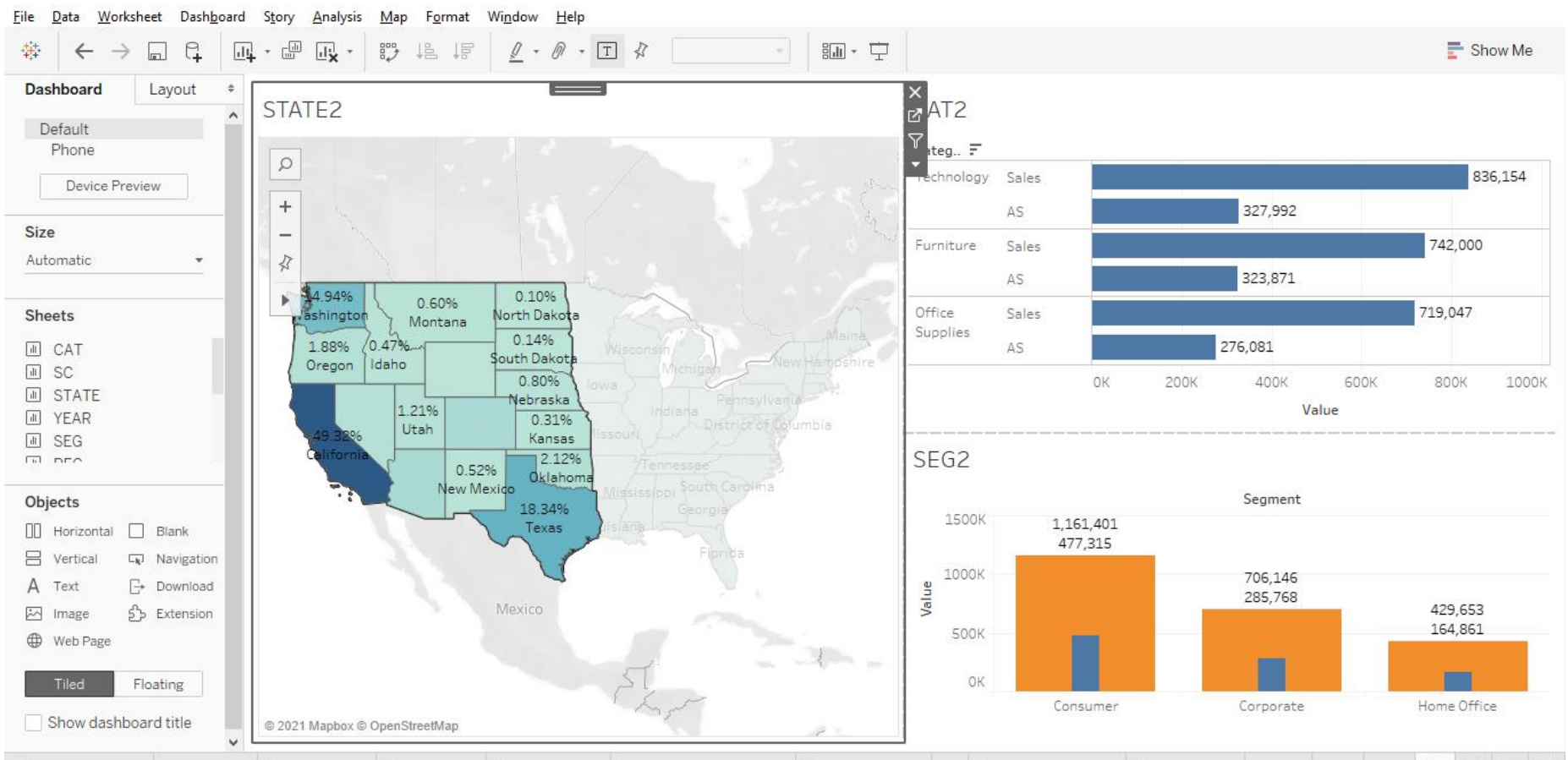
# Dashboard Actions -Action Parameter

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



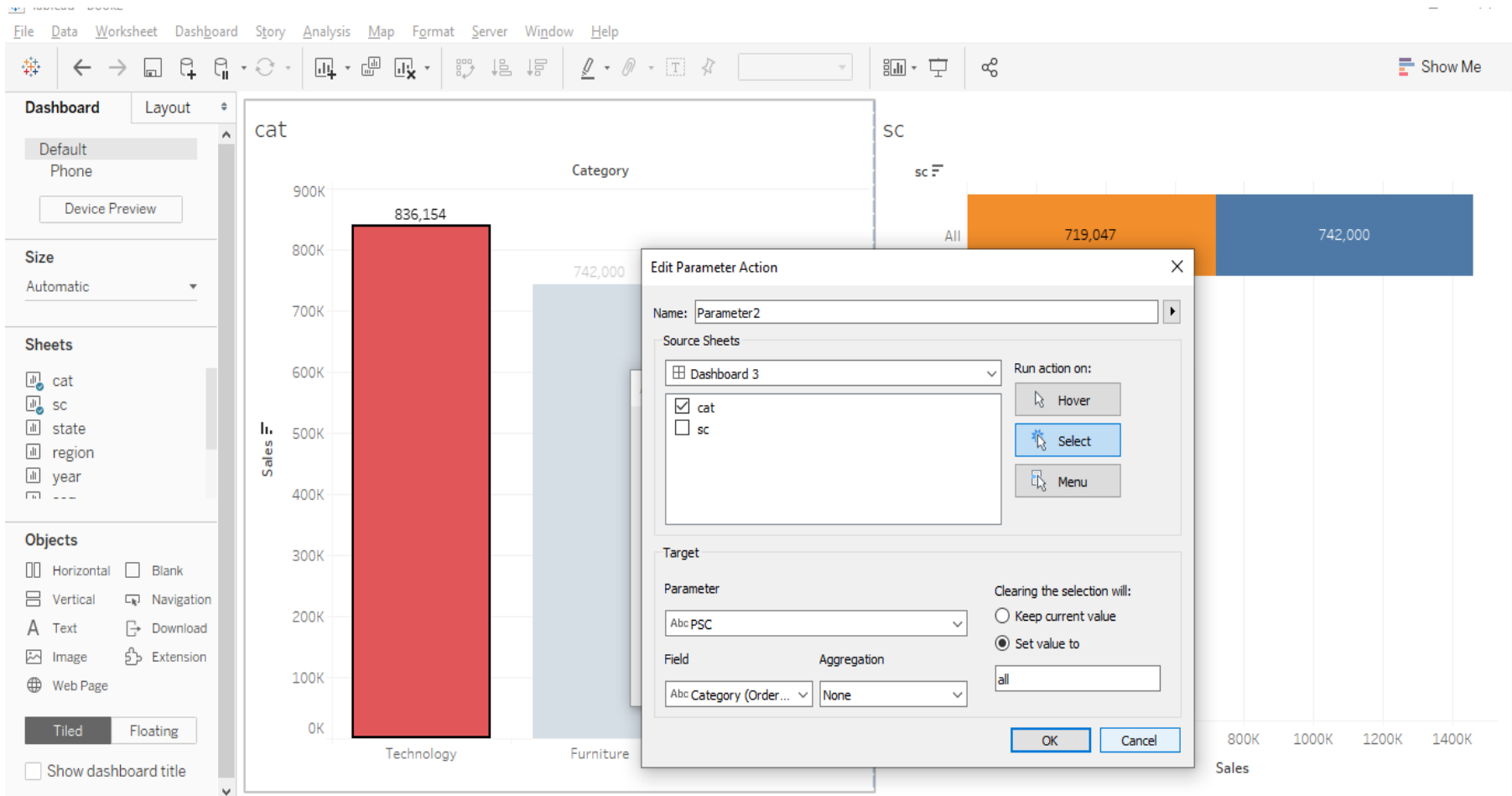
# Dashboard Actions -Action Set

- 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.

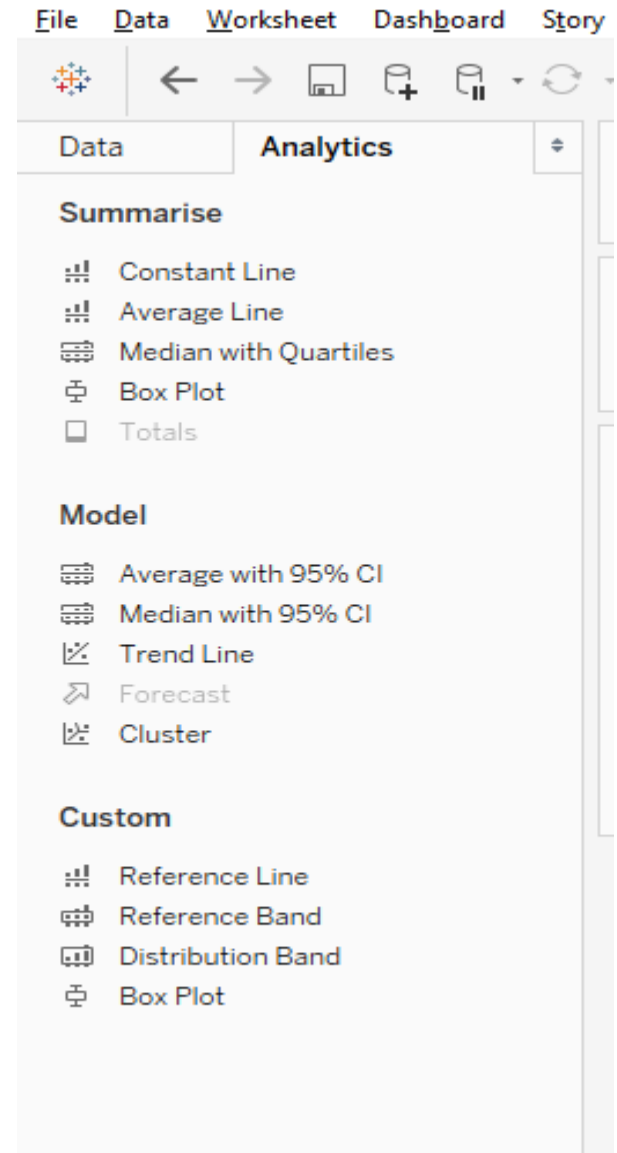


# Analytics Pane

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.

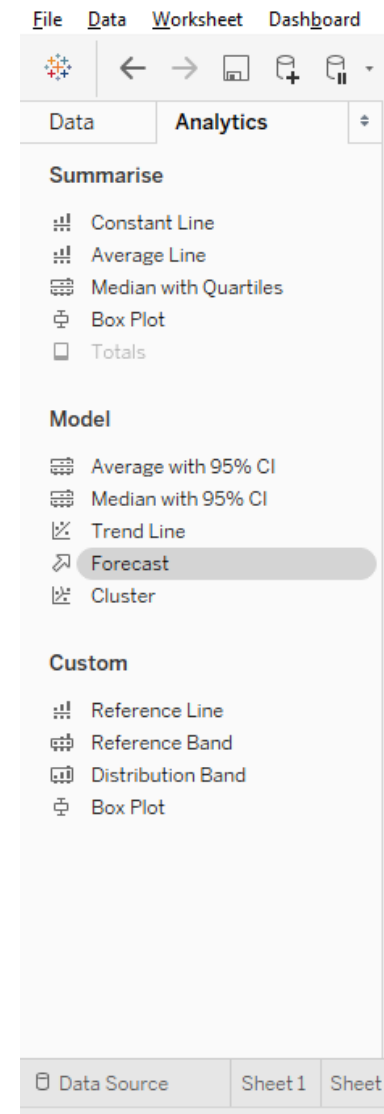
This technique of identifying regular patterns from existing data values and giving a forecast is known as **Exponential Smoothing**.

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

**Trends** - increase or decrease in data over time

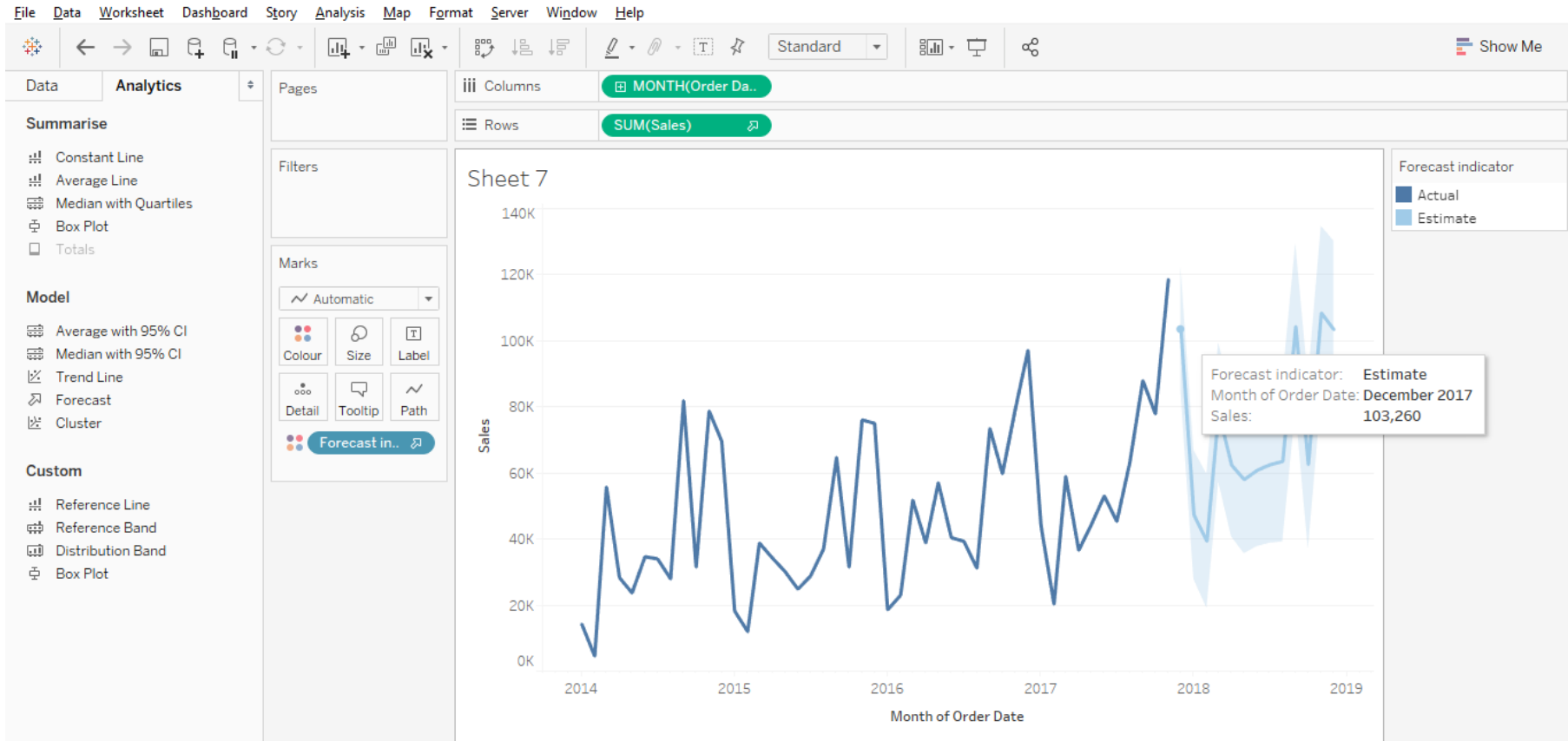
**Seasonality** - repeating variation in values over a determined period of time (such as weekly, quarterly, yearly, etc) known as seasons

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



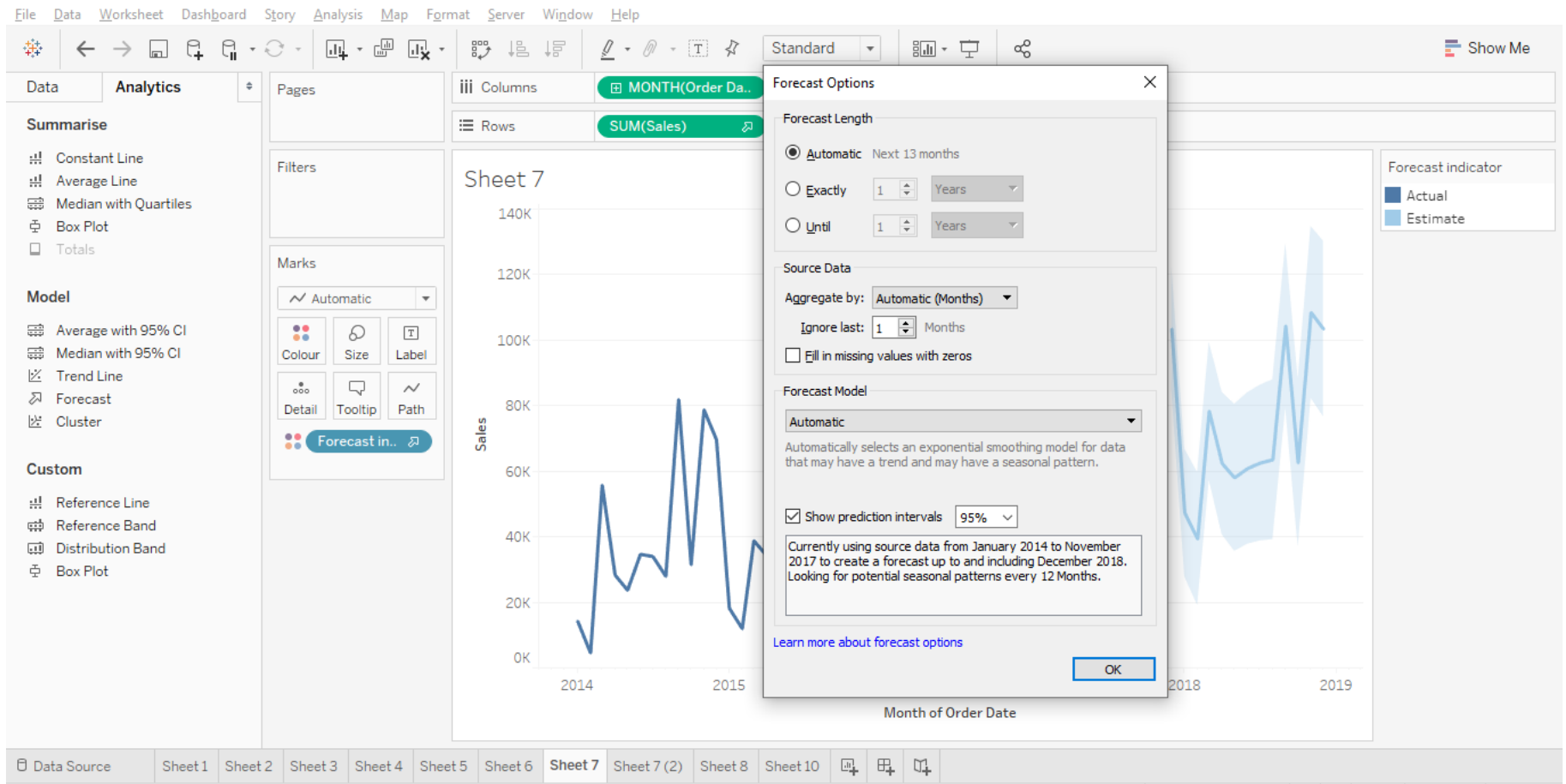
# Forecasting

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

Analytics

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

Columns: MONTH(Order Da..)

Rows: SUM(Sales)

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

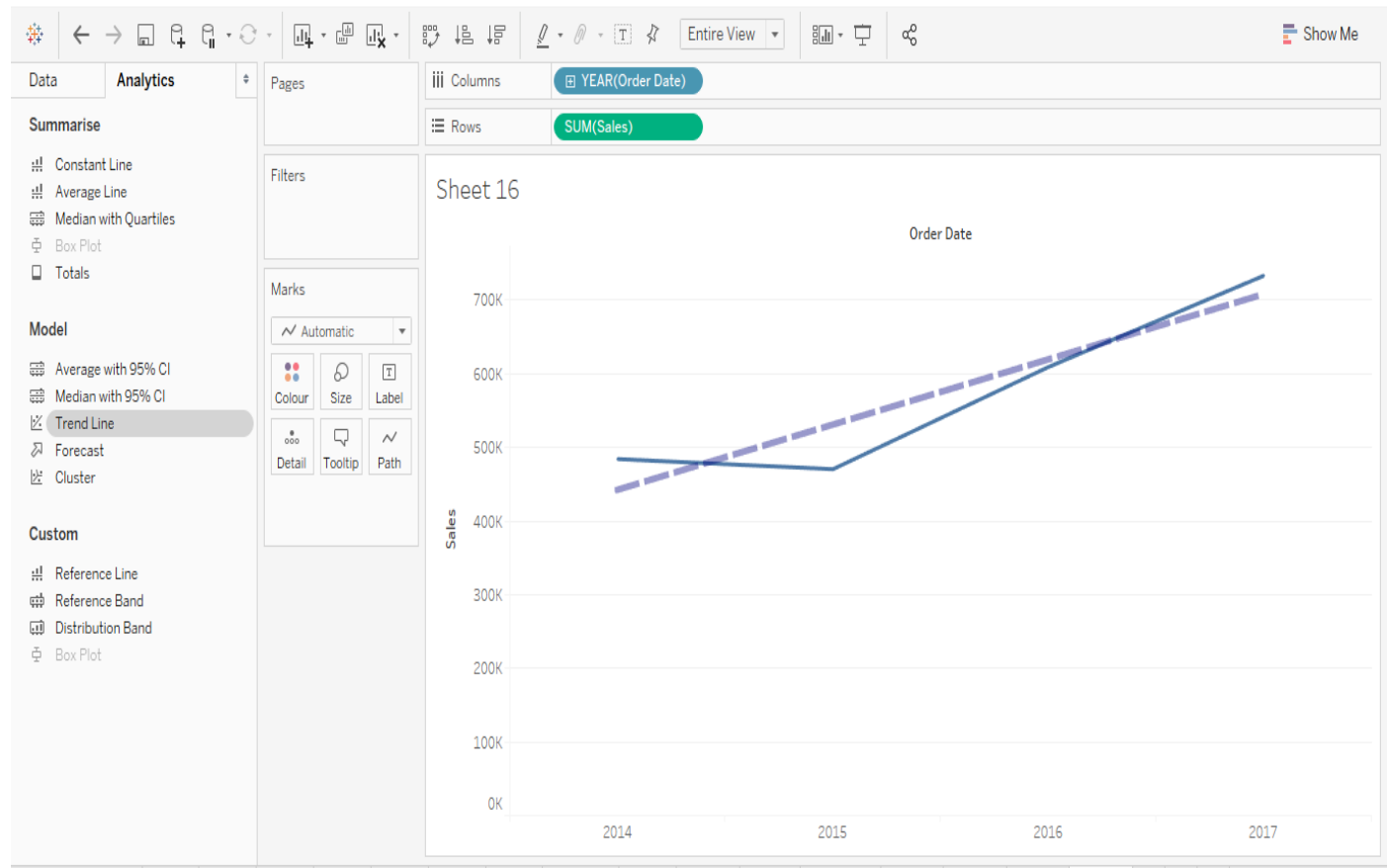


# Trend Lines

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:

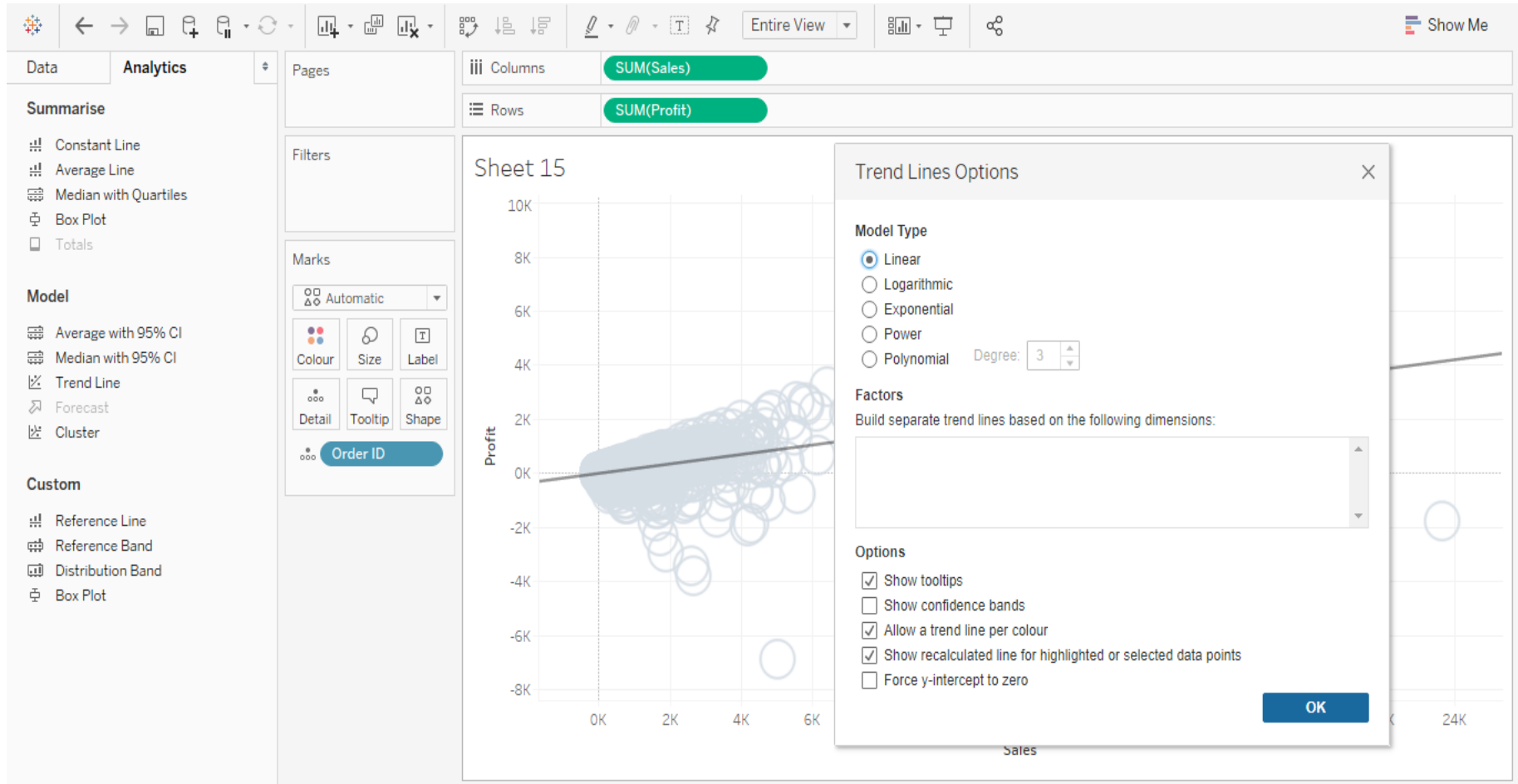
- Linear
- Exponential
- Logarithmic
- Polynomial
- Power





# 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.

