**Tableau Introduction 01: Tableau Basics Session using Superstore Data**

**Session for ANI, Belfast on Tableau Basics/Core Functionality**

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**Connect to Data**

Orders – Join to Returns

Cross DB joins – Join to People

Metadata management:

Row ID -> String

Order ID -> Split & Rename ‘Distribution Centre’

Note Live vs Extract

**Sheet 1**

Row: Category & Segment

Column: Quantity & Region

Colour: Region

Dimensions: Categorical Fields – Date, CustomerID, Product Name – Discrete Variables: BLUE

Measures: Numerical Variables – Discount, Profit, Quantity – Continuous Variables: GREEN

**Sheet 2**

Row: Sales

Column: Order Date (Defaults to Year)

+ Symbol Year -> Quarter

Swap order: Quarter, Year

Drag Year -> Colour

Change Quarters to Months

Change Sales to Av (& Revert)

**Year-over-Year Growth**

Click on Sales > Quick Table Calculations > Yr Over Yr Growth (Triangular Delta mark appears)

Drag Sales to Rows

Drag Yr Over Yr Calc to Tooltip. Note Nov 2017 Spike

Drag Category to Row. Note that most of spike is in Technology

Rt+Click: Save as Options ‘Image’ etc

Rt+Click on pane & Copy > Data. Paste to Excel. Note that % Difference in Sales is also copied

Rename: “Sales Seasonality”

**Sheet 3**

Rt+Click on “Sales Seasonality” tab -> Duplicate as Crosstab

Swap axes

Move Category to Rows

Hide Title & Column headers

Change to Fit Width

Profit -> Colour

Edit Colour: Red-Blue Diverging & Stepped to 6

Mark Type = Square & turn on Labels

Click: Category -> Show highlighter

Rename: Profit Crosstab

**Sheet 4**

‘Show Me’

Ctrl+click on a Dimension/Measure

Sales & State

Choropleth/filled map

T -> Mark Labels

Search: Rhode Island

Unpin

Drag Category -> Filters

Choose ‘Furniture’

Rt+Click -> Show Filter -> Single Values List

Rt+Click -> Region -> show as filter

Rt+Click -> Order DT -> show as filter

Change Order DT to continuous -> show as filter

Rt+Click -> Person -> show as filter. Note: Filter from different data source

Rename: “Sales by State”

**Sheet 5**

Ctrl+click: Category, Subcategory, Sales & choose Horizontal Bars from Show Me

Create Hierarchy: Drop Subcategory onto Category & Rename as ‘Products’

Add: Product name

Sort by ribbon, expand to sub category & use quick sort at bottom

Drag Sales to Text & Format to $

Drag Profit to Colour

Drag Region to Columns

Group Small Office Supplies w/ paperclip

Rename (Edit alias) to Small Supplies

Rename: Sales by Subcategory

**Sheet 6**

Rows: Category, Subcategory

Create Calculate Field: Profit Ratio

SUM([Profit])/SUM([Sales])

Drag Profit Ratio to Columns & Edit to %

Create Calculated Field:

IF [Profit Ratio] < 0 THEN 'Bad'

ELSEIF [Profit Ratio] >= 0 THEN 'Good'

END

Drag Colour to Colour shelf & Edit colours

Rename: Profit Ratio

**Build & Publish Dashboard**

Set Filters to apply to all

Use Graph as Filter

Add Title: ‘Our Sales & Profit Dashboard’

Format title: Bold, Centre. Colour & Border

Publish