# Tableau Lab 3 Handout

Interactive Dashboard

NOTE: This lab handout is only for the labs and not for homeworks.

Chart 1: Profit by Category and Subcategory

1. Drag Category to Rows
2. Drag Sub-Category to Rows
3. Drag Profit on the sheet column (drop where you see abc on the sheet)
4. Click on Show me Pane and select Bar Chart
5. Drag and drop "profit" to color under marks tab
6. You can edit the color as per your choice
7. To edit the grid lines:
   a. Right click on the sheet
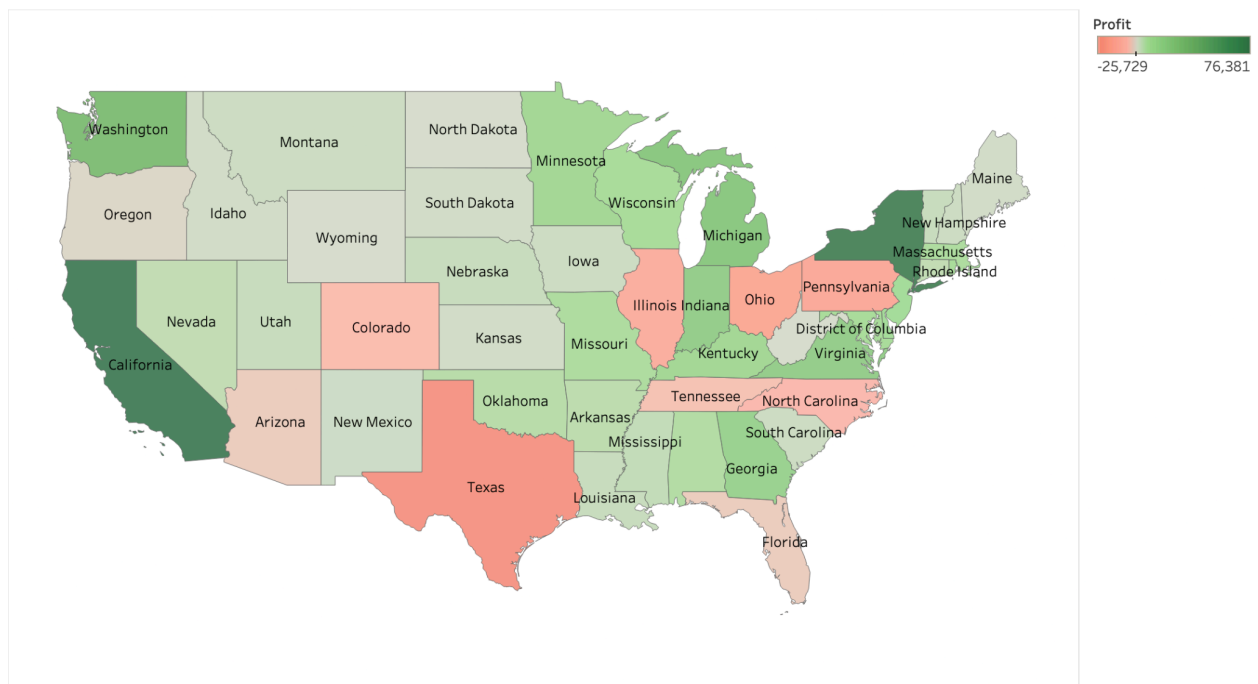   b. Select "format"
   c. Go to grid lines → rows → select None
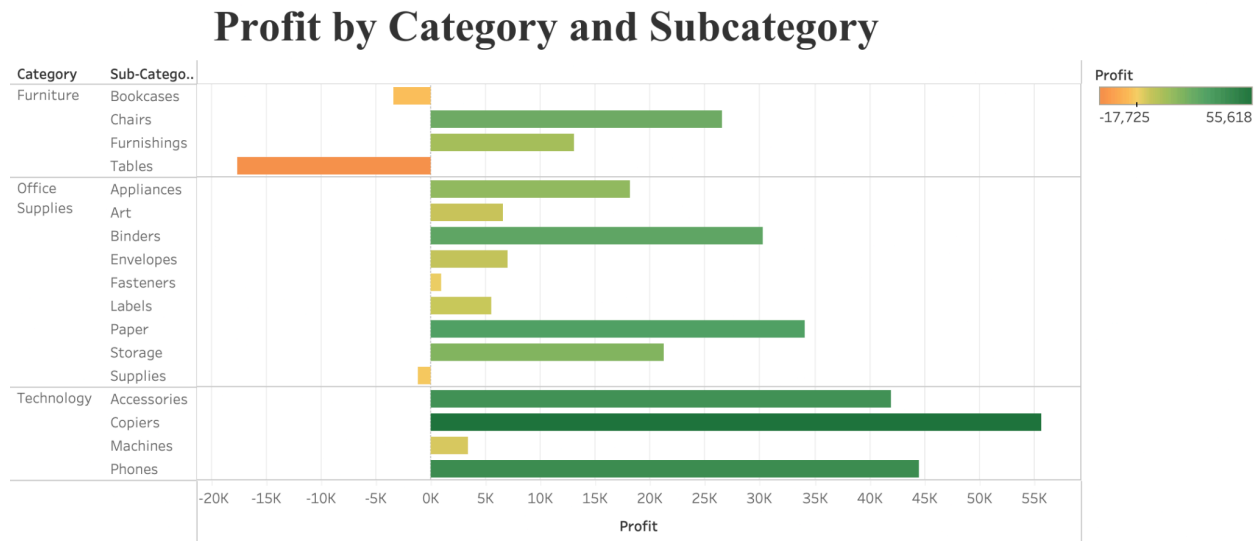
Sum of Profit for each Sub-Category broken down by Category. Color shows sum of Profit.

Chart 2: Profit by State

1. Drag State and Drop it on the Sheet
2. Drag profit and drop it on the sheet
3. Circles size should vary based on profit
4. Select Show me Pane → Select Map
5. Add Region and Order Date into filters

Profit by State

Map based on Longitude (generated) and Latitude (generated). Color shows sum of Profit. The marks are labeled by State. Details are shown for State.

Chart 3: Profit by Manufacturer

1. Since we don't have the column for manufacturer:
    a. Explore "Product Name" column
    b. Realize that the first word for "Product Name" is the name of the manufacturer
    c. Create a new calculated field "manufacturer" and use the following formula
       <mark>LEFT([Product Name], FINDNTH([Product Name], ' ', 1) - 1)</mark>
2. Drag Manufacturer into the columns
3. Drag profit into the rows section
4. To swap rows and columns → Use swap rows and columns icon present on below the main menu bar at the top
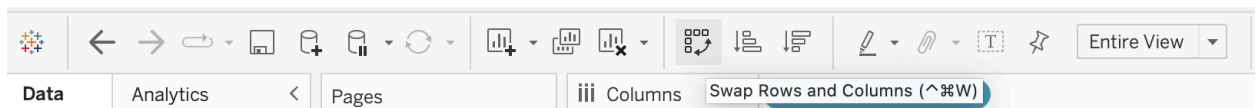

5. To sort the values:
    a. Click on the dropdown menu of manufacturer under the columns section → click on sort
    b. Select "sort by" as "field"
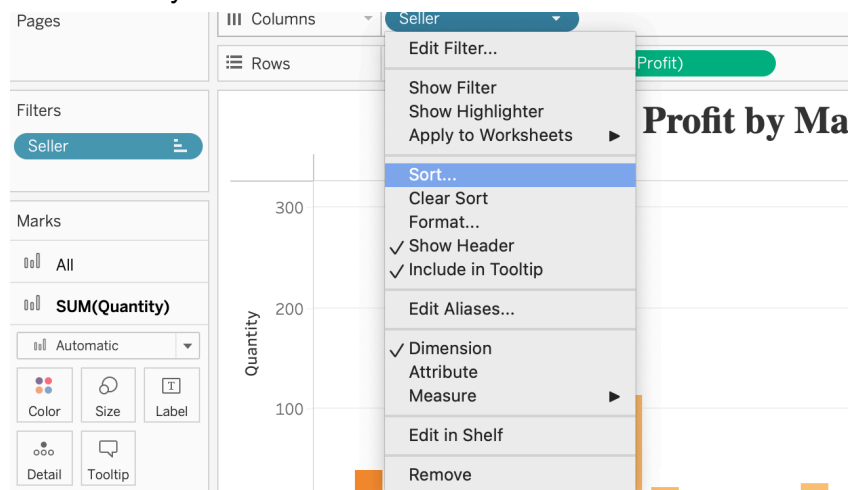
6. To filter the values:
    a. Drag manufacture in the filters
    b. Go to Top and select "by field"
    c. Play around with number of top and bottom values
    d. Since we want manufacturers with the loss, we will select "bottom" and "30"
7. Drag Profit into color
8. We also want to see the quantities of products that manufacturer sold:
    a. Drag Quantity column besides Profit in the "Rows"

9. Select entire view for better visibility
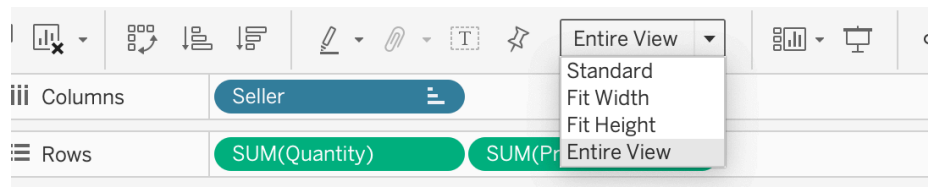
10. Change color for "Quantity" :
    a. Go to "Quantity" layer (created automatically)
    b. Remove Profit from color section

Profit by Manifacturer
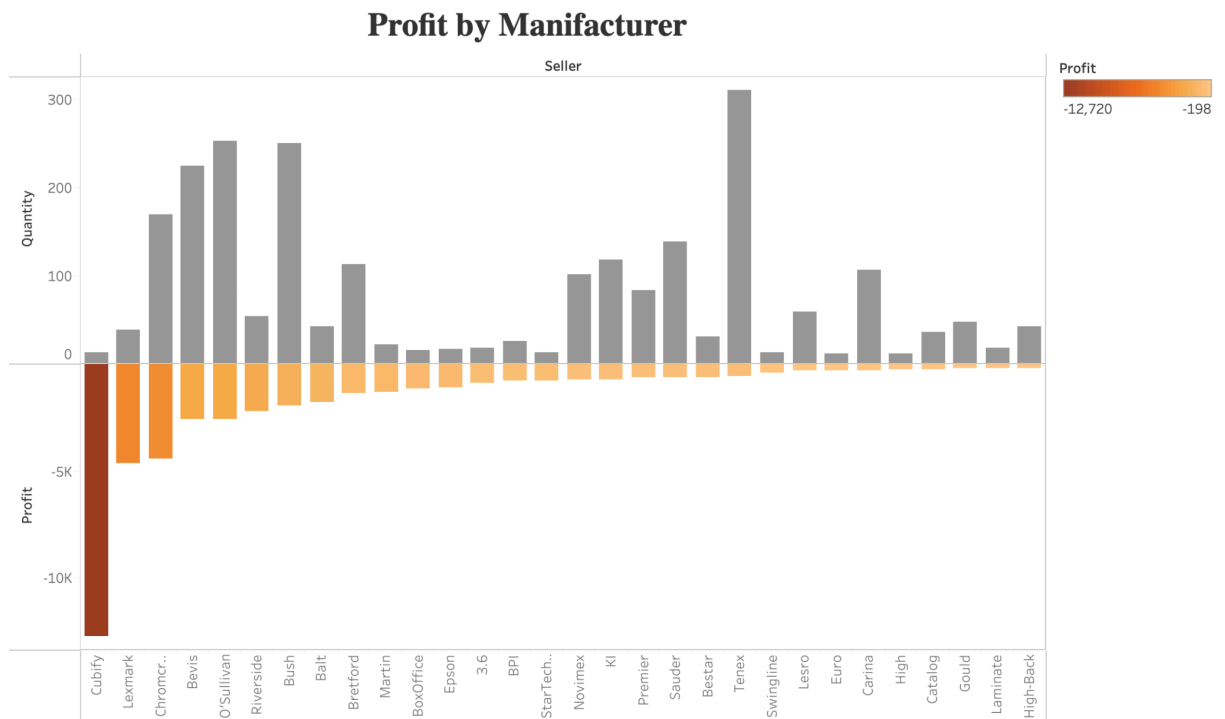
Sum of Quantity and sum of Profit for each Seller. For pane Sum of Profit: Color shows sum of Profit. The view is filtered on Seller, which keeps 30 of 466 members.

INTERACTIVE DASHBOARD

1. Create a new dashboard
2. Below objects → select "Floating" instead of "Tiled" in the left pane (Floating allows us to adjust the size and location of the chart).
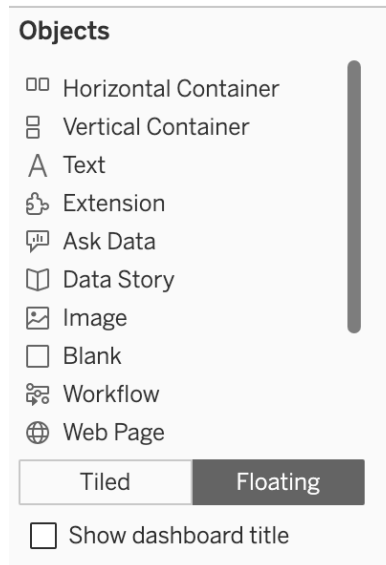

3. Drag all three sheets on the dashboard one-by-one and adjust the size accordingly.
4. Remove the marks tab to get a clean dashboard
5. Making dashboard interactive:
   a. Click on "Use as a filter" option when you click on the profit by category and subcategory chart

6. Repeat the same process for other two charts
7. To add category and subcategory filters (as dropdowns)
   a. Click on the profit by category and subcategory chart and open dropdown
   b. Select filters
   c. Select "category"
   d. Select filters again and select "subcategory"
   e. You should see two news cards created for category and subcategory
   f. Click on the category → open dropdown → select multiple value list
   g. Repeat the same process for subcategory
8. Profit by State chart:
   a. Click on the chart

  b. Open Dropdown

  c. Select filters → Region

  d. Select filters again → Order Date

  e. Select Single value dropdown for Region

  f. Select Slider for Date card

9. To make sure that the filters are applied for all the charts:

  a. Click on the card → open dropdown → select "apply to worksheets" → select "all using related data sources"
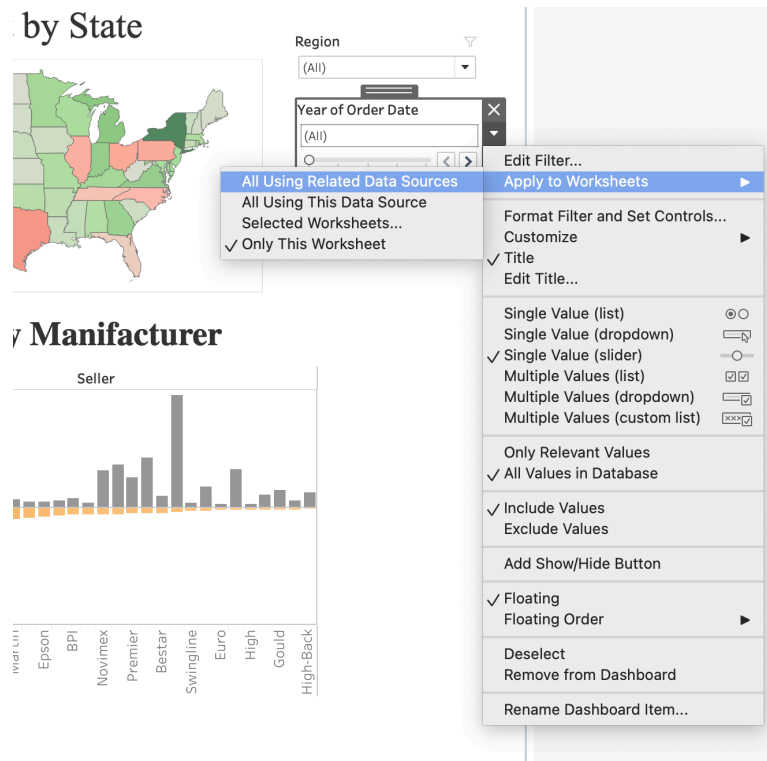
10. Click on the "category" and "subcategory" dropdowns → and select "Only Relevant Values"

Category

Office Supplies ▼

Sub-Category

(All) ▼

Edit Filter...	
Apply to Worksheets	▶
Format Filter and Set Controls...	
Customize	▶
✓ Title	
Edit Title...	
Single Value (list)	⊙○
Single Value (dropdown)	▭▷
Single Value (slider)	─○─
Multiple Values (list)	☑☑
✓ Multiple Values (dropdown)	▭☑
Multiple Values (custom list)	xxx☑
Wildcard Match	xxx|
✓ Only Relevant Values	
All Values in Database	
✓ Include Values	
Exclude Values	
Add Show/Hide Button	
✓ Floating	
Floating Order	▶
Deselect	
Remove from Dashboard	
Rename Dashboard Item...	

Final Dashboard:

Profit and Loss Dashboard
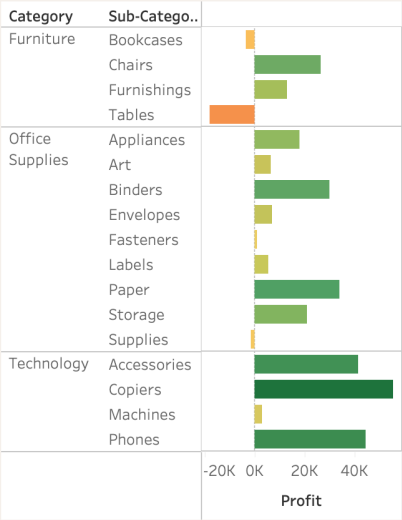
Profit by State

Profit by Category and Subcategory

Category	Sub-Catego..	
Furniture	Bookcases	
	Chairs	
	Furnishings	
	Tables	
Office Supplies	Appliances	
	Art	
	Binders	
	Envelopes	
	Fasteners	
	Labels	
	Paper	
	Storage	
	Supplies	
Technology	Accessories	
	Copiers	
	Machines	
	Phones	

Profit: -20K 0K 20K 40K

Profit by Manufacturer

Seller — Quantity: 300, 200, 100, 0

Profit: -5K, -10K

Lexmark, Bevis, Riverside, Balt, Martin, Epson, BPI, Novimex, Premier, Bestar, Swingline, Euro, High, Gould, High-Back
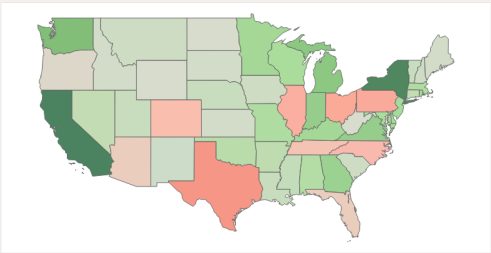
Region
All

Year of Order Date
All

Category
All

Subcategory
All