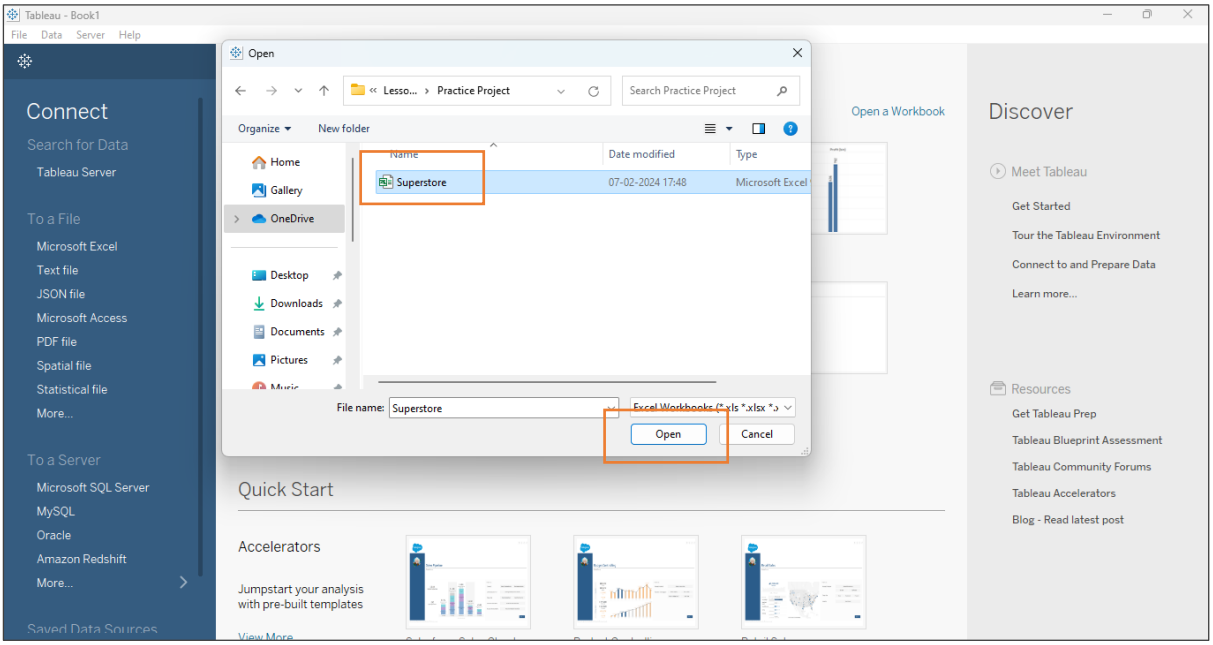
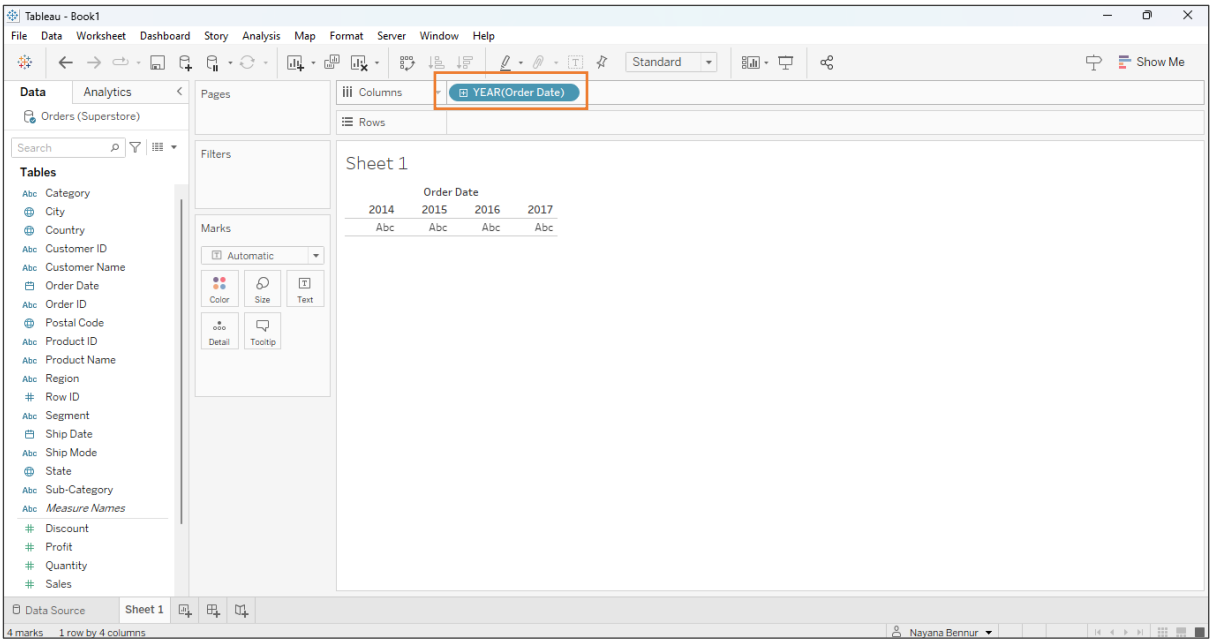
Lesson 04: Navigating Trends and Forecasts

Answer Key

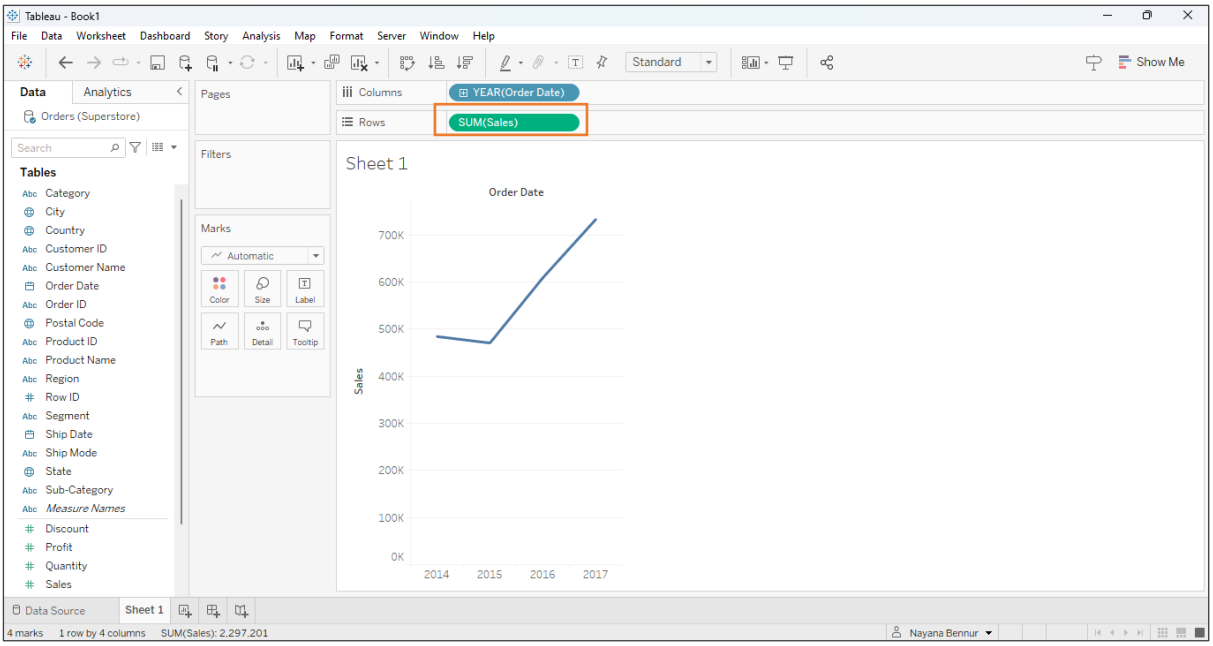
1. **Import Superstore Data**
    - Open Tableau Desktop
    - Connect to the Superstore sales dataset (Superstore.xls)
    - Import the data into Tableau



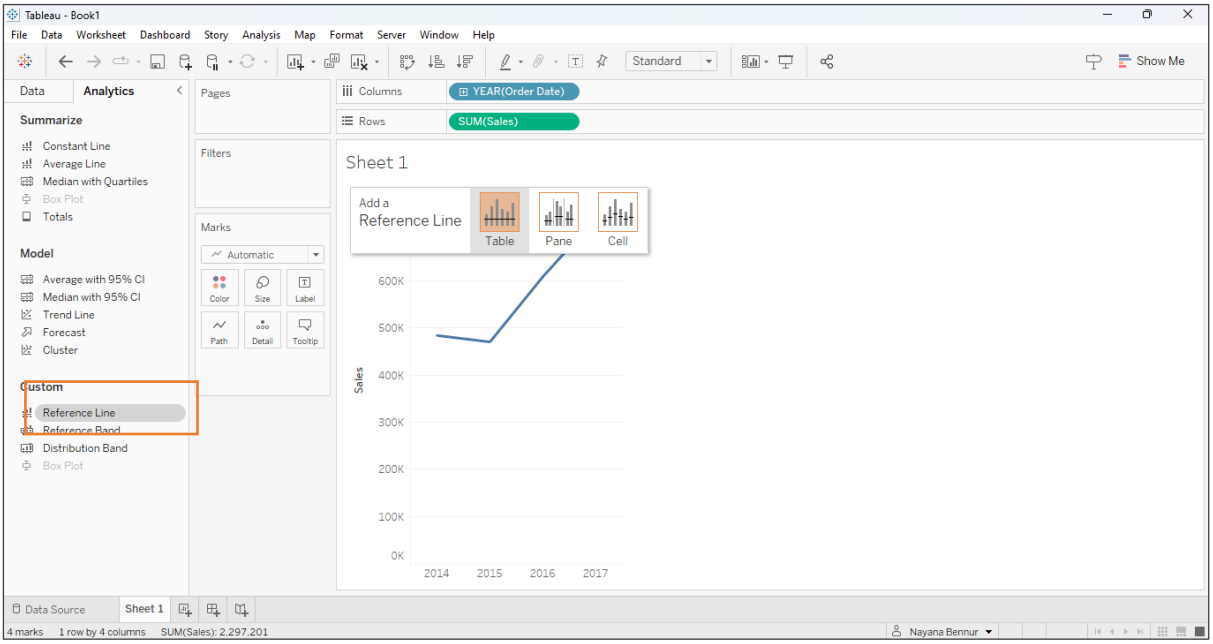
2. **Reference Lines**
    - Drag the **Order Date** field to the **Columns** shelf



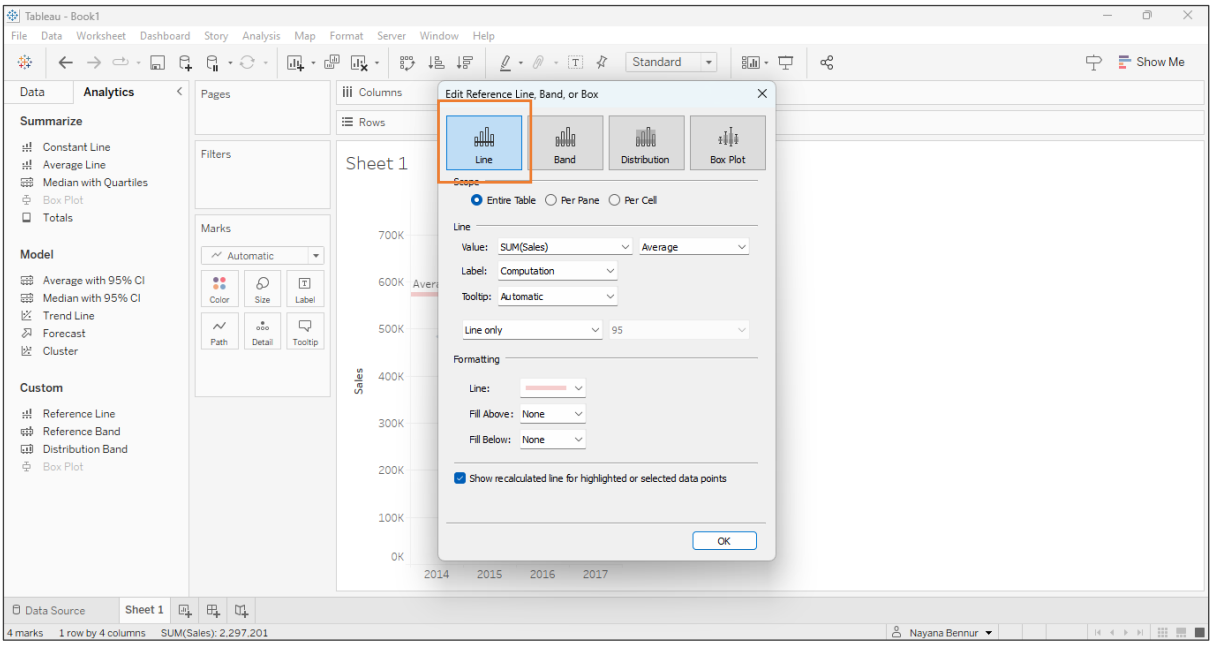
- Drag the **Sales** field to the **Rows** shelf



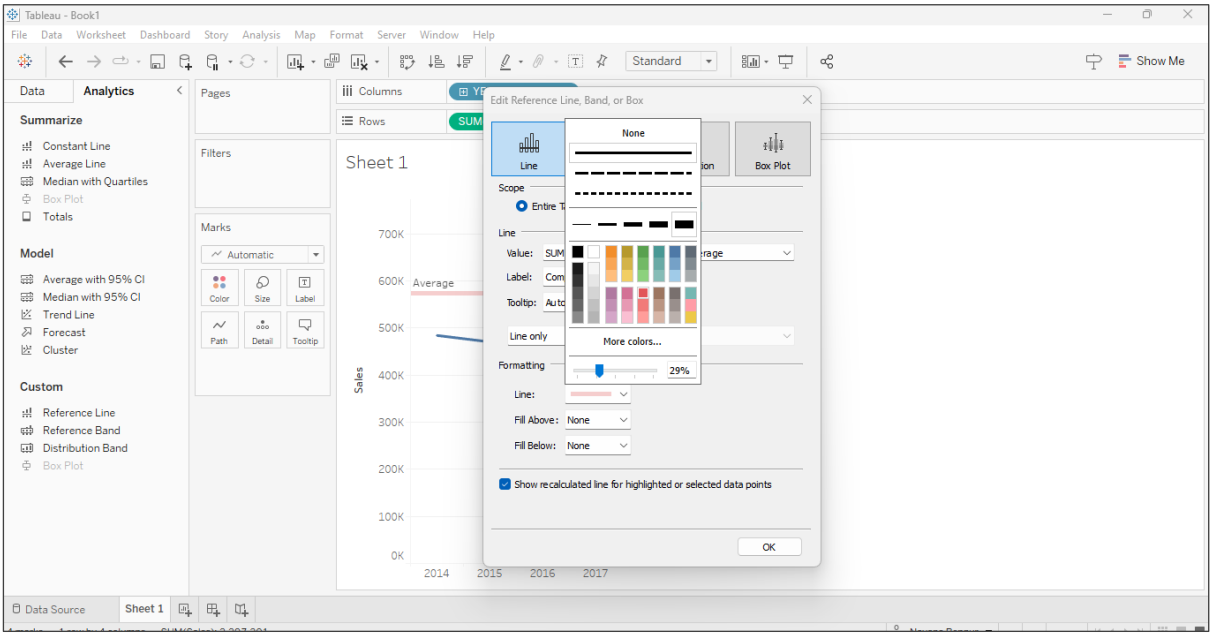
- In the **Analytics** pane, select **Add Reference Line**



- Configure the reference line to display the average sales over time

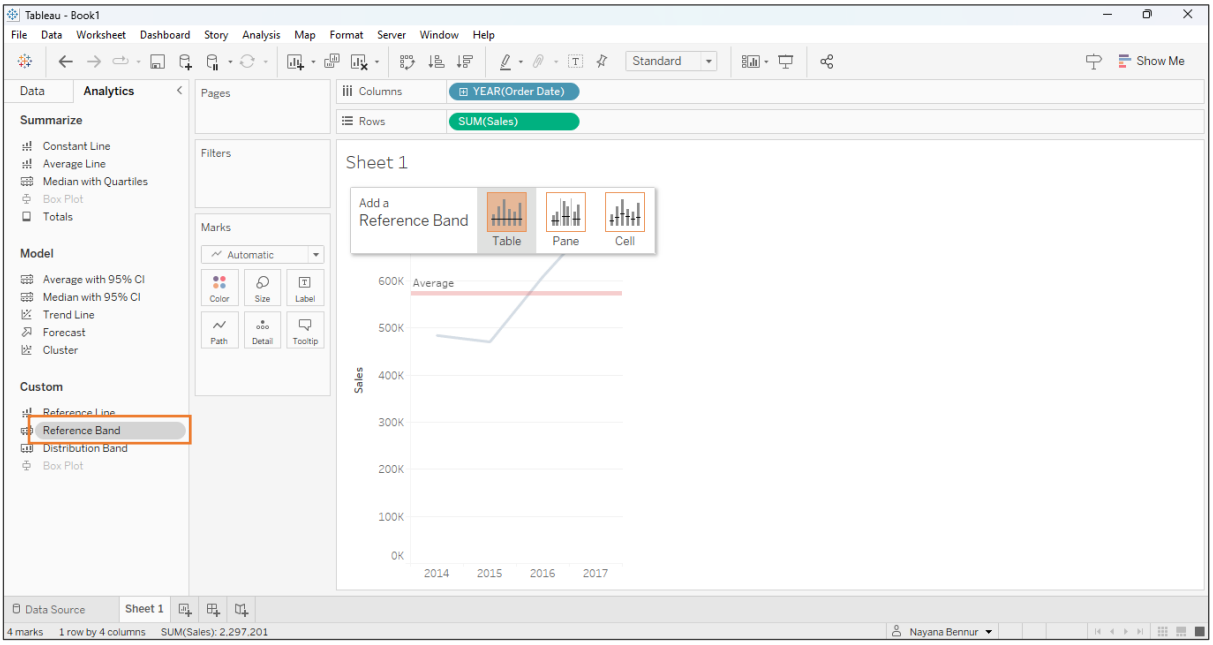


- Change line formatting: make line bold and update the color

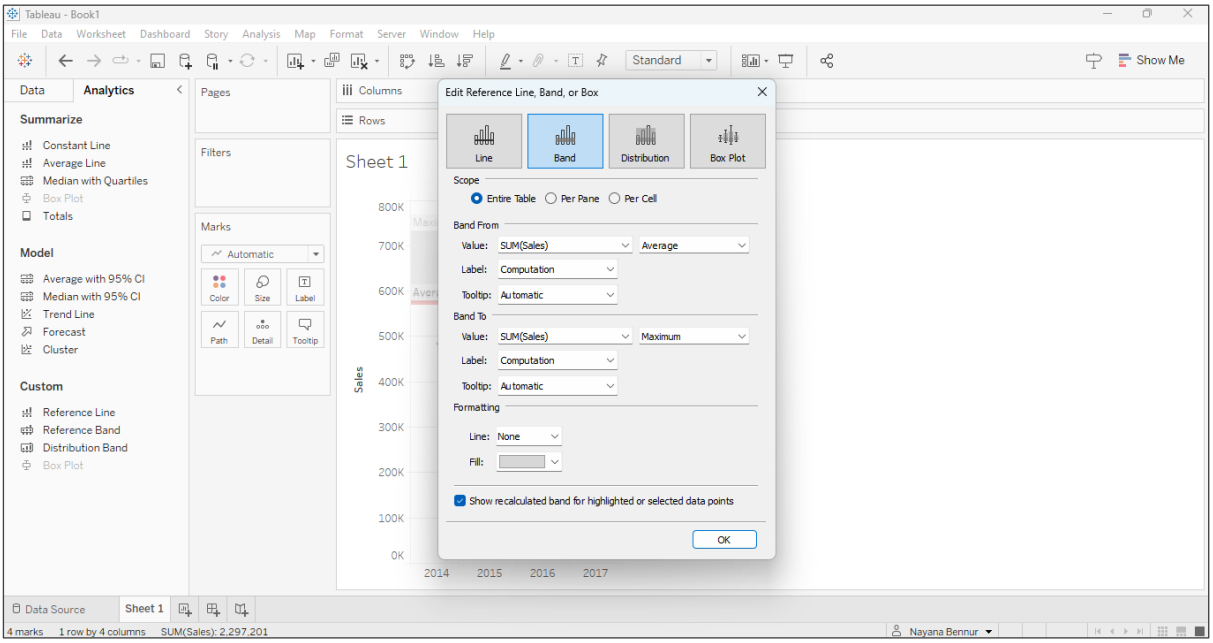


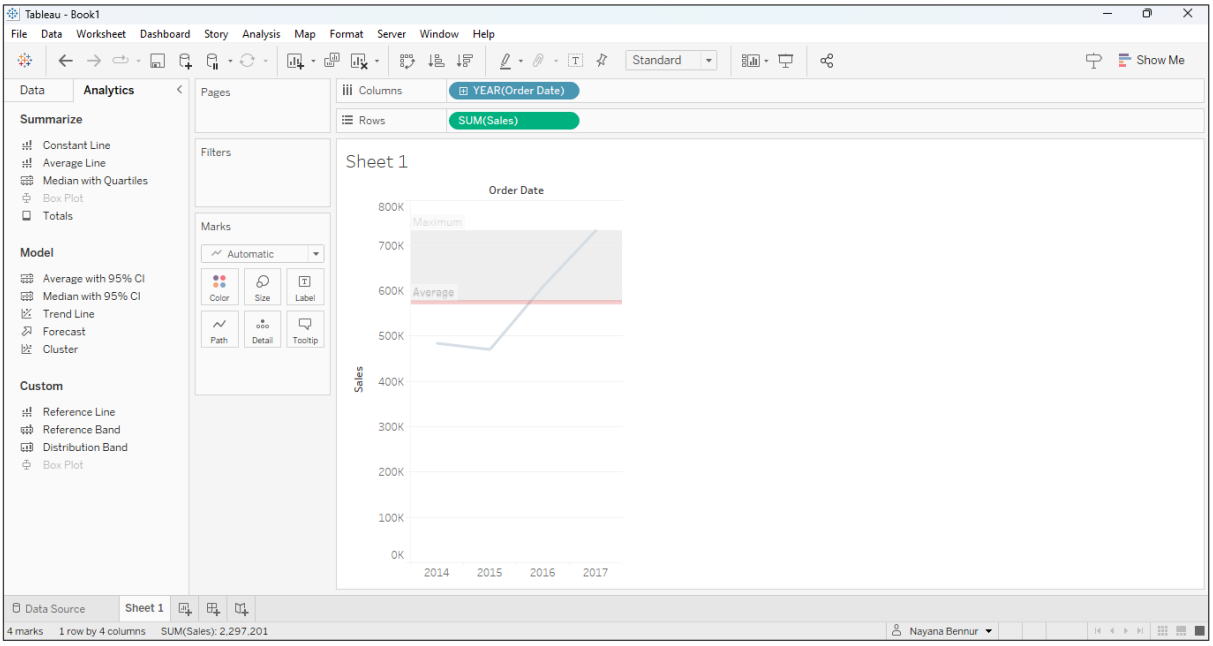
3. Reference Bands

- In the **Analytics** pane, select **Add Reference Band**



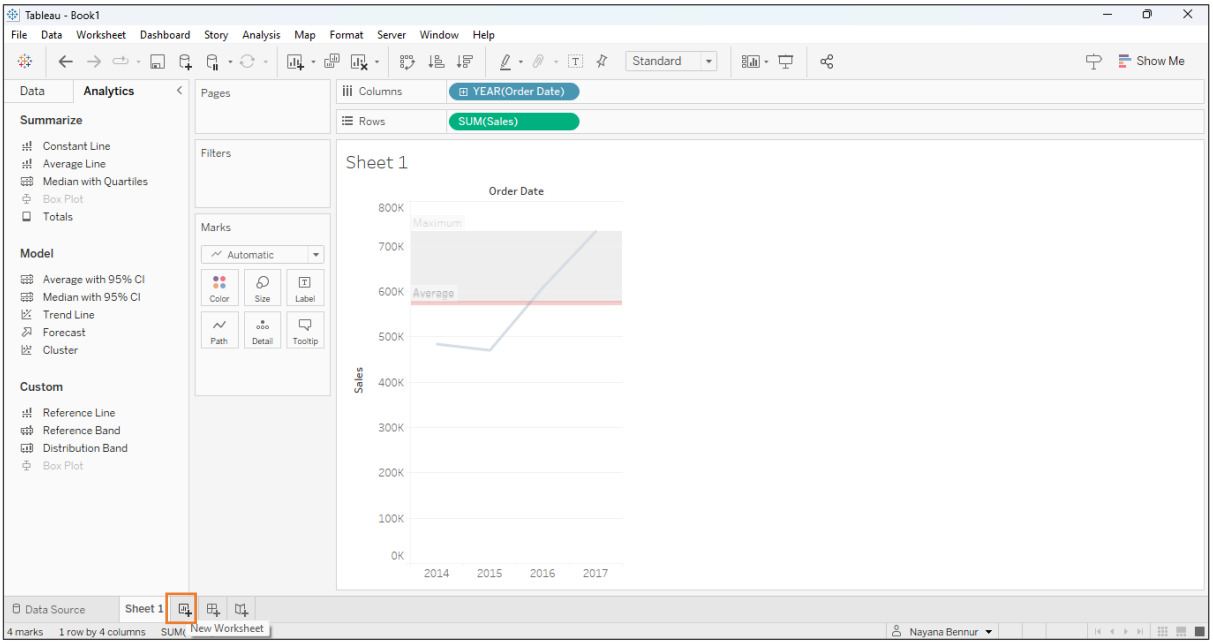
- Define the reference band to highlight sales trends from average to maximum



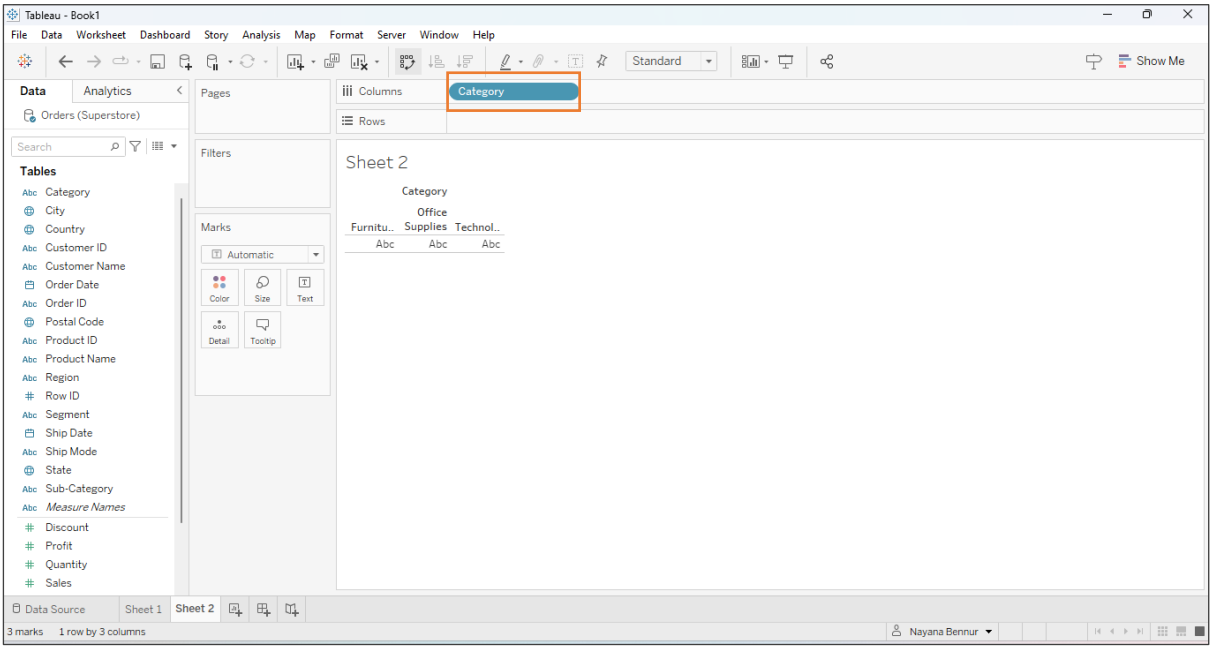


4. Distribution Analysis

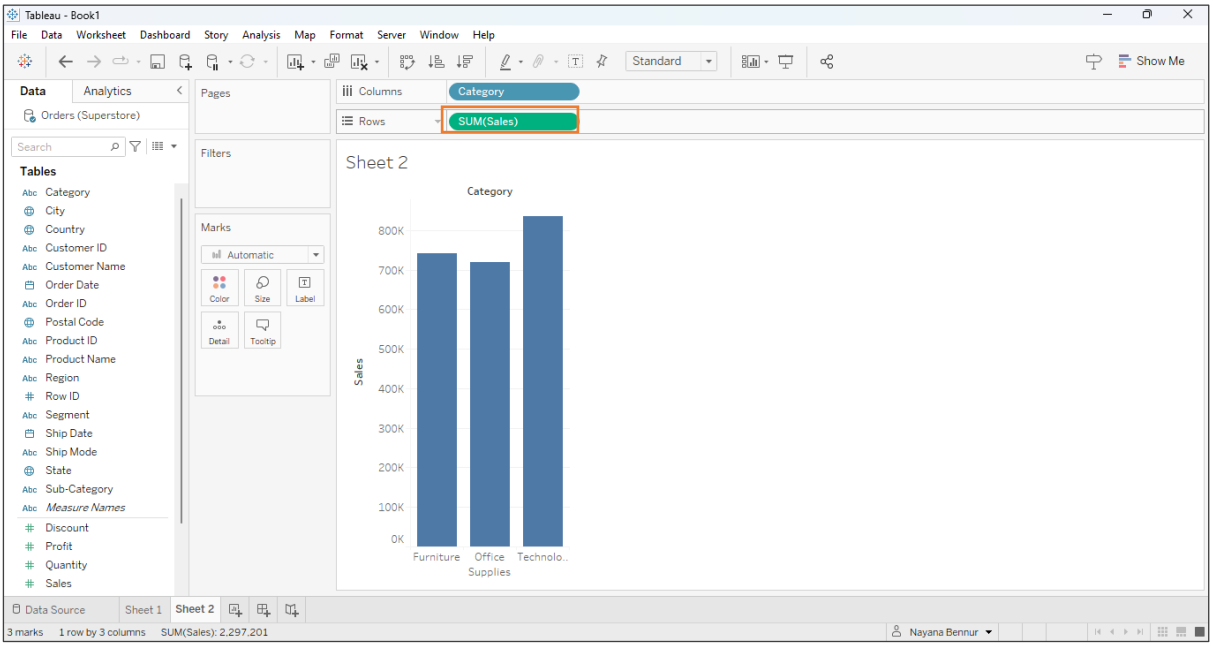
- Create a new worksheet



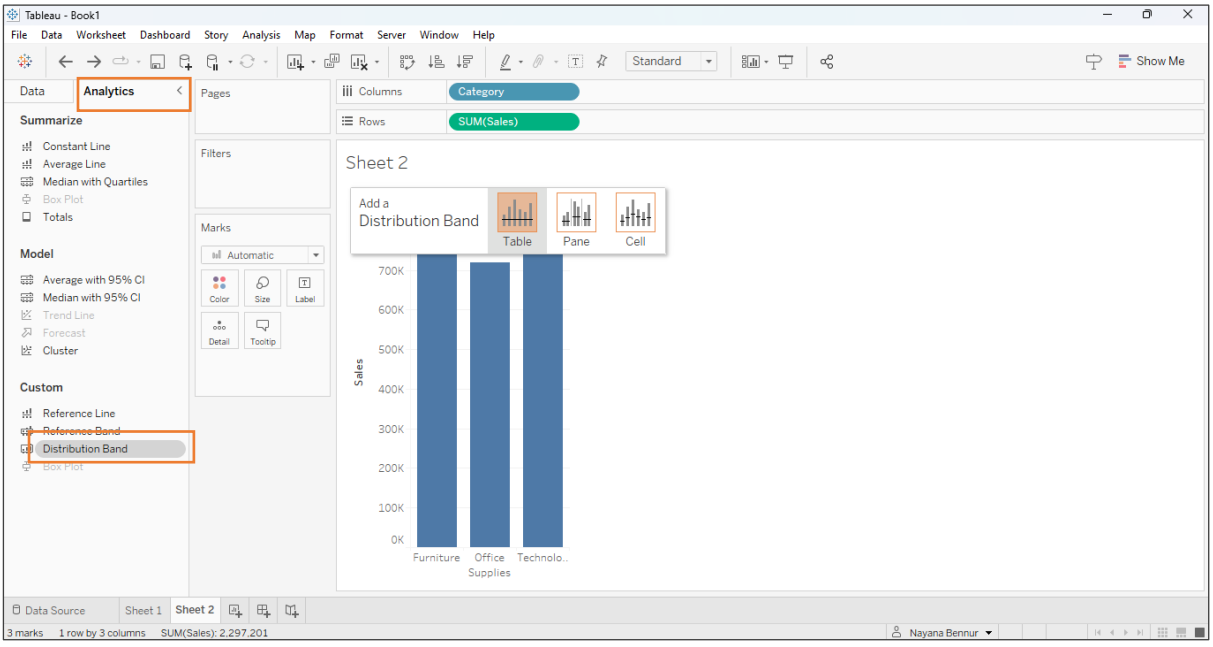
- Drag the **Category** field to the **Columns** shelf



- Drag the **Sales** field to the **Rows** shelf

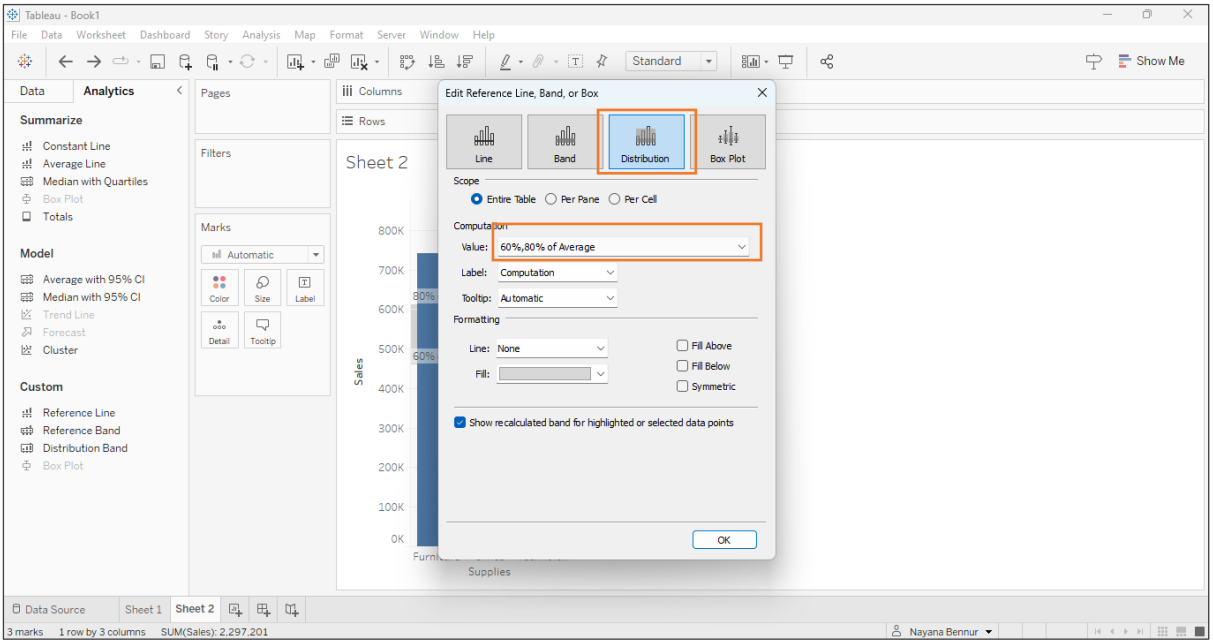


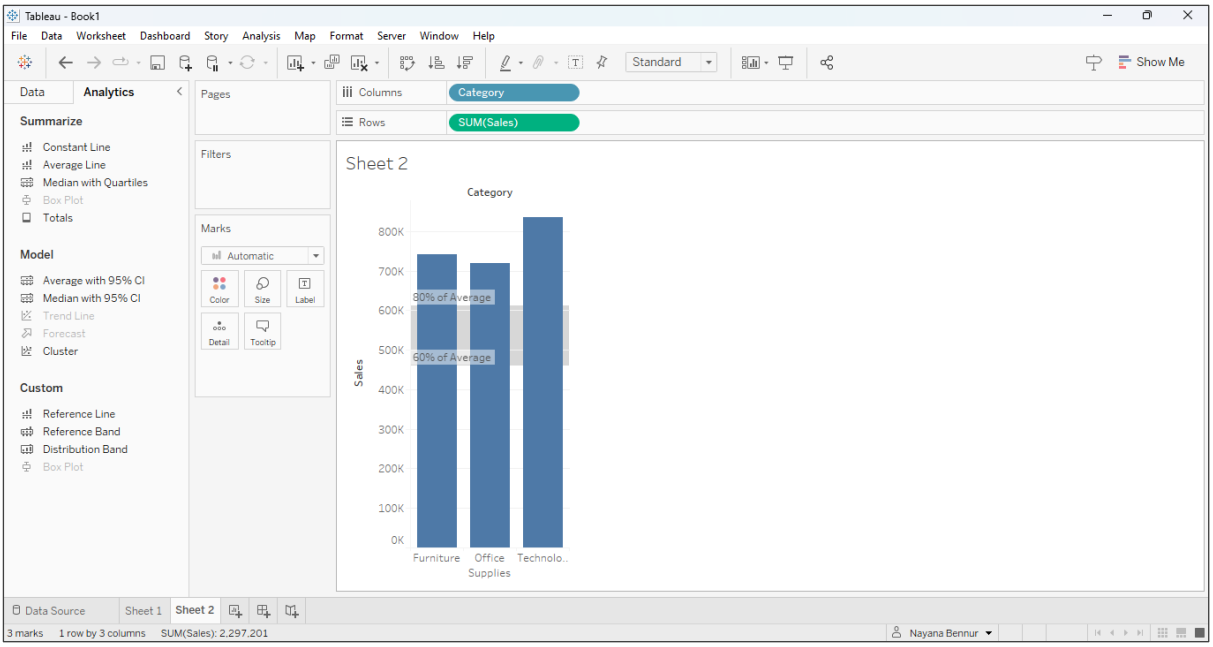
- Drag **Distribution Band** from **Analytics** pane



- Click on **OK**

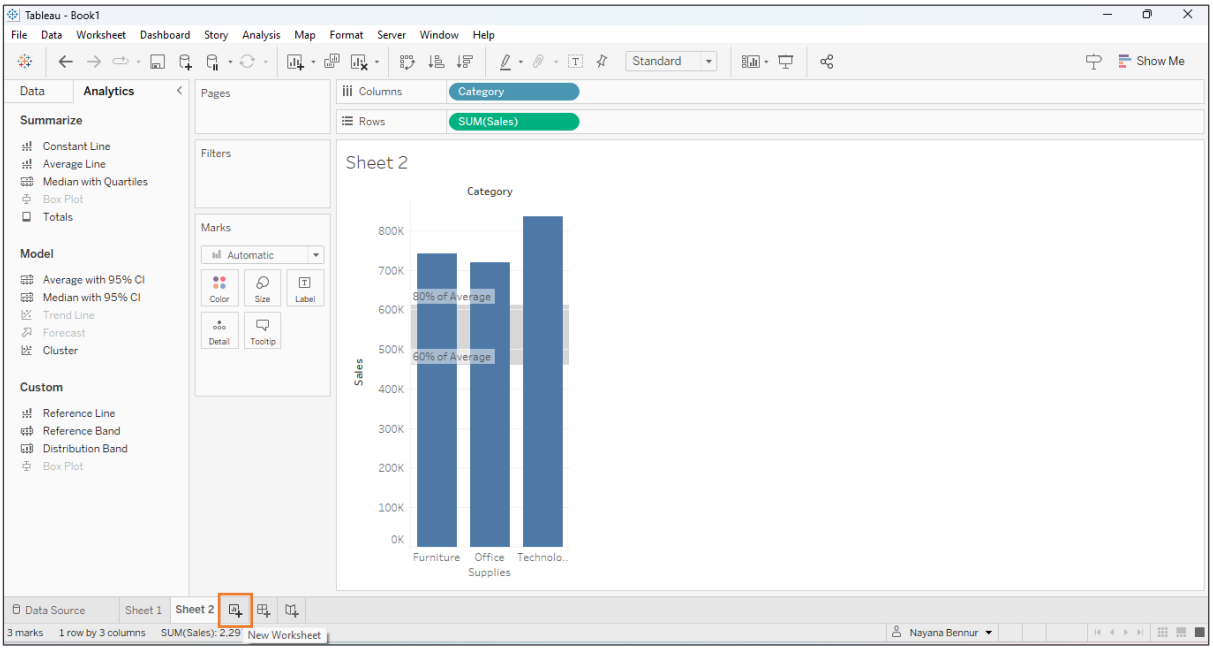
It will represent **60% to 80% of the Average** sale.



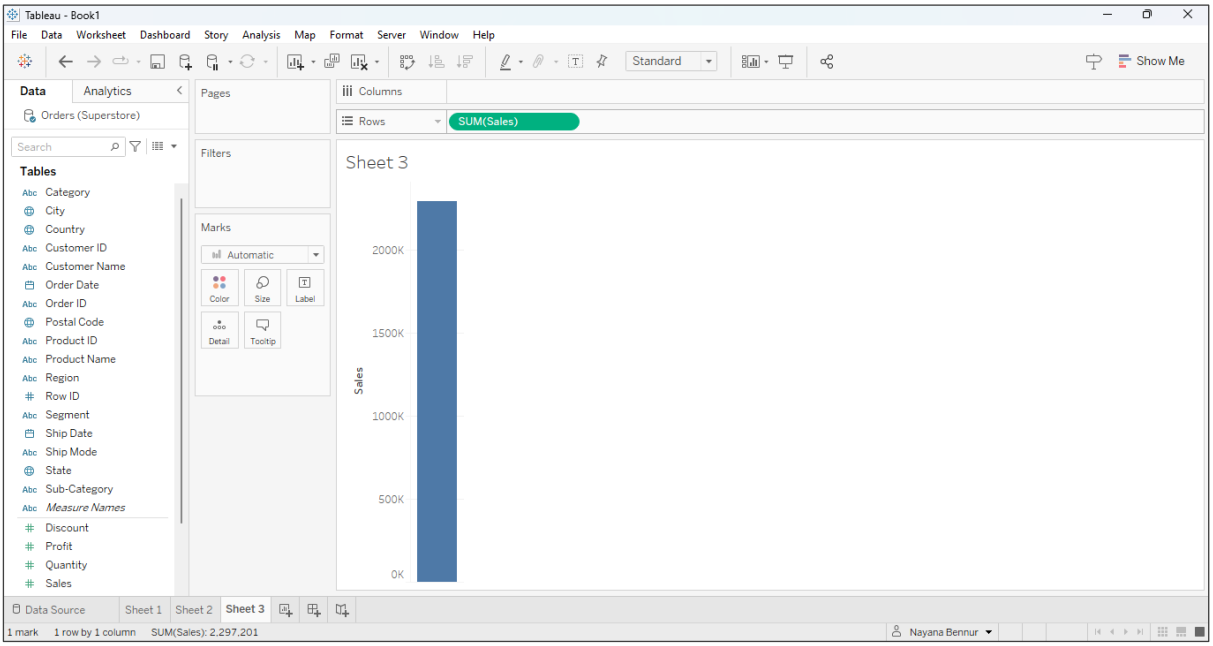


5. Box Plot

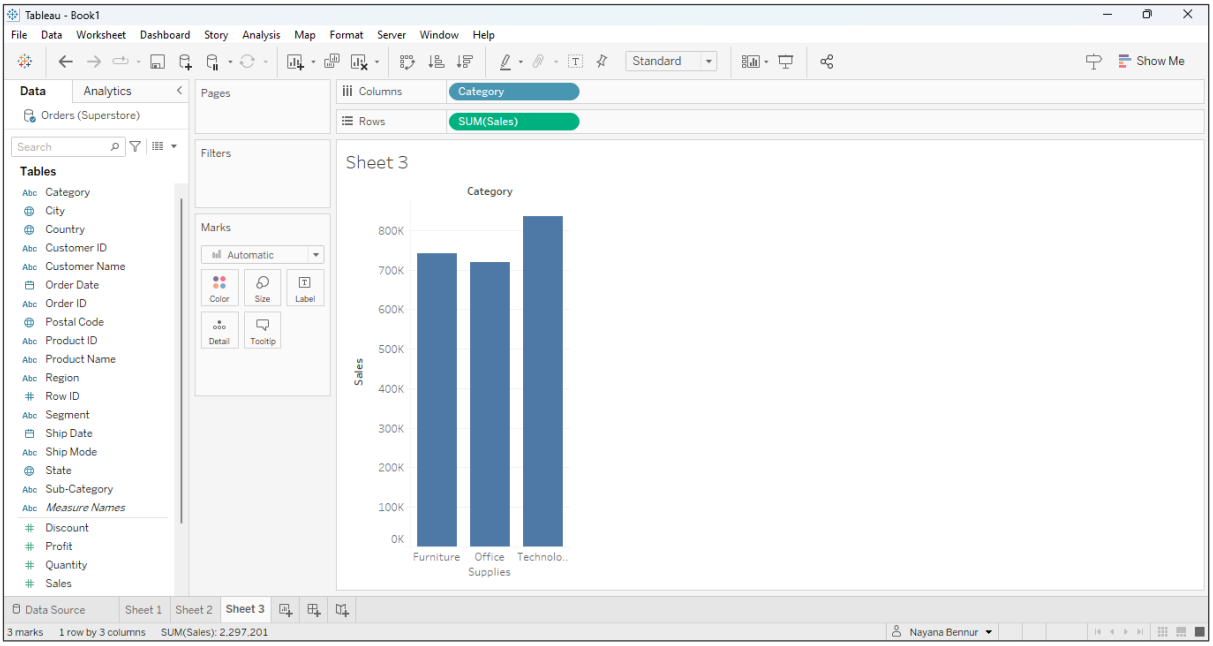
- Create another worksheet



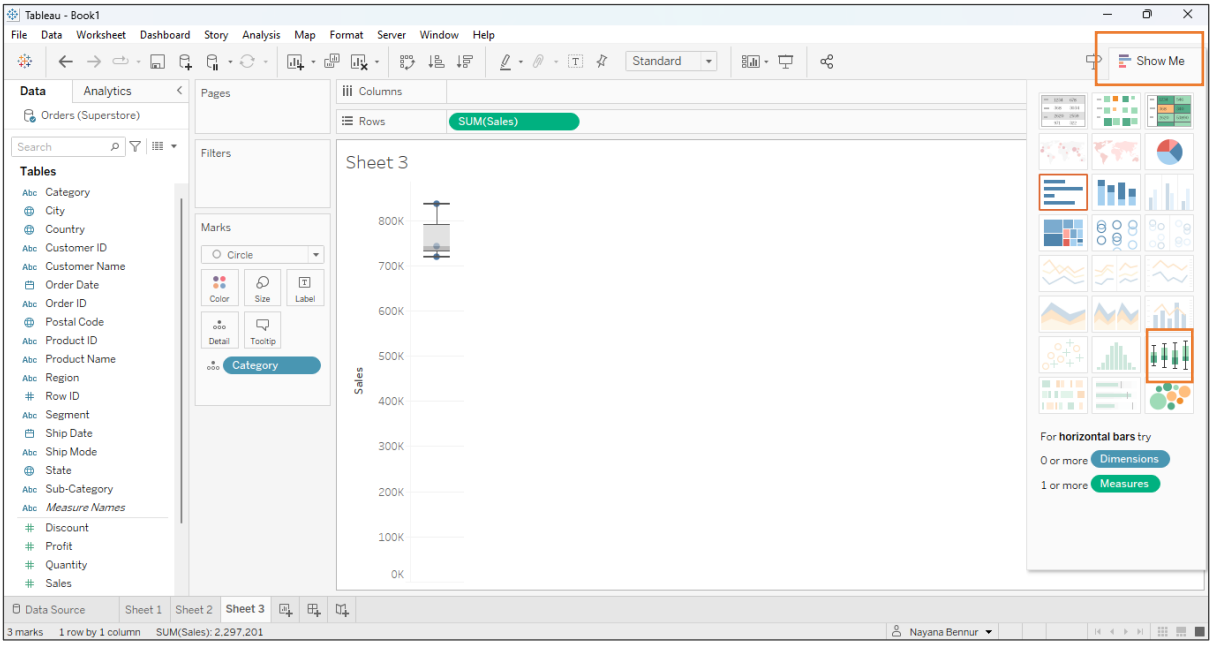
- Drag the **Sales** field to the **Rows** shelf



- Drag the **Category** field to the **Columns** shelf

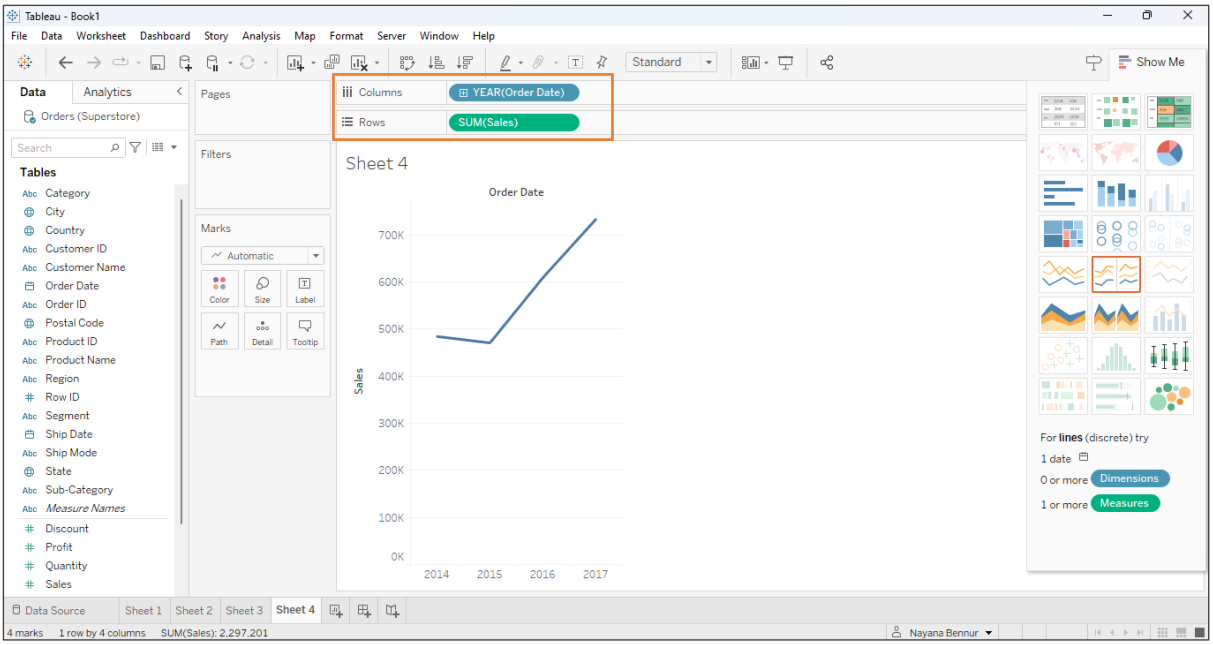


- Select **Show Me** and choose the box plot (**box-and-whisker-plot**)

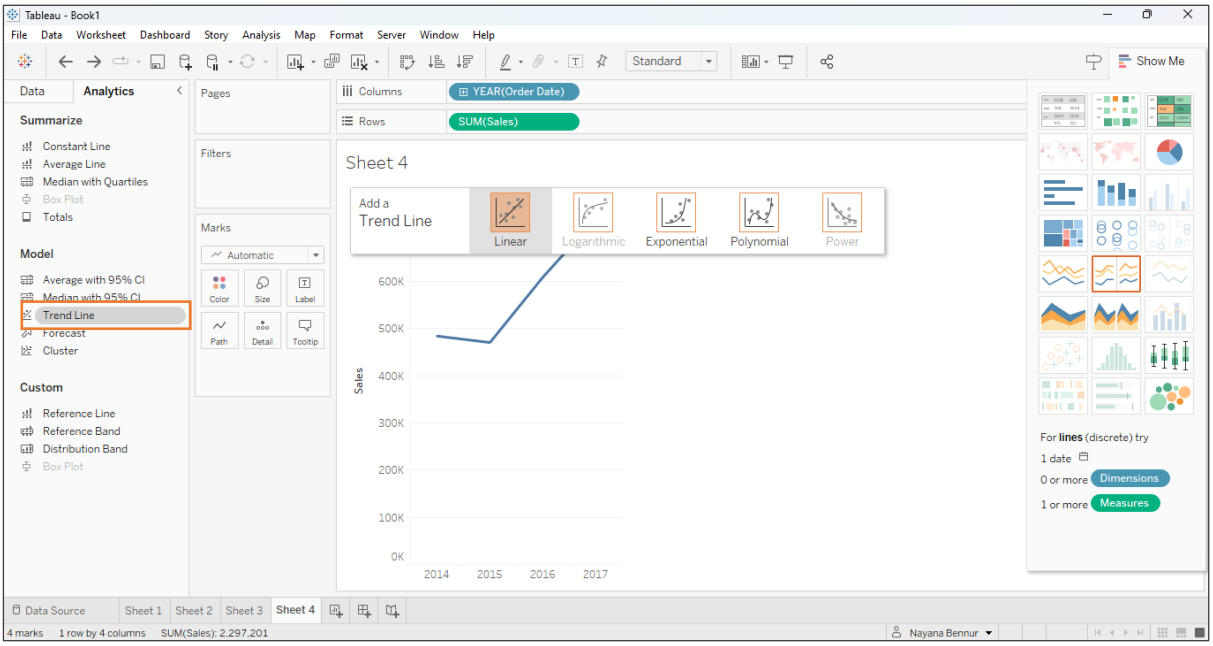


6. Trend Lines

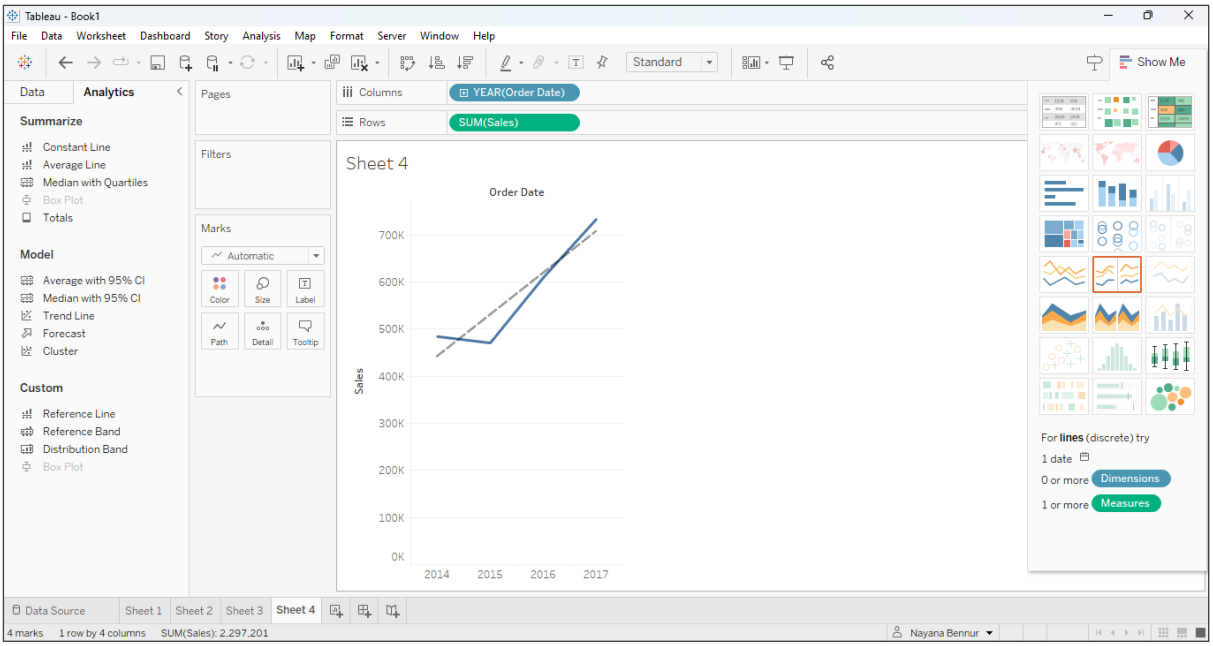
- Navigate to new worksheet and drag **Order Date** to **Columns** and **Sales** to **Rows**



- In the **Analytics** pane, select **Add Trend Line**

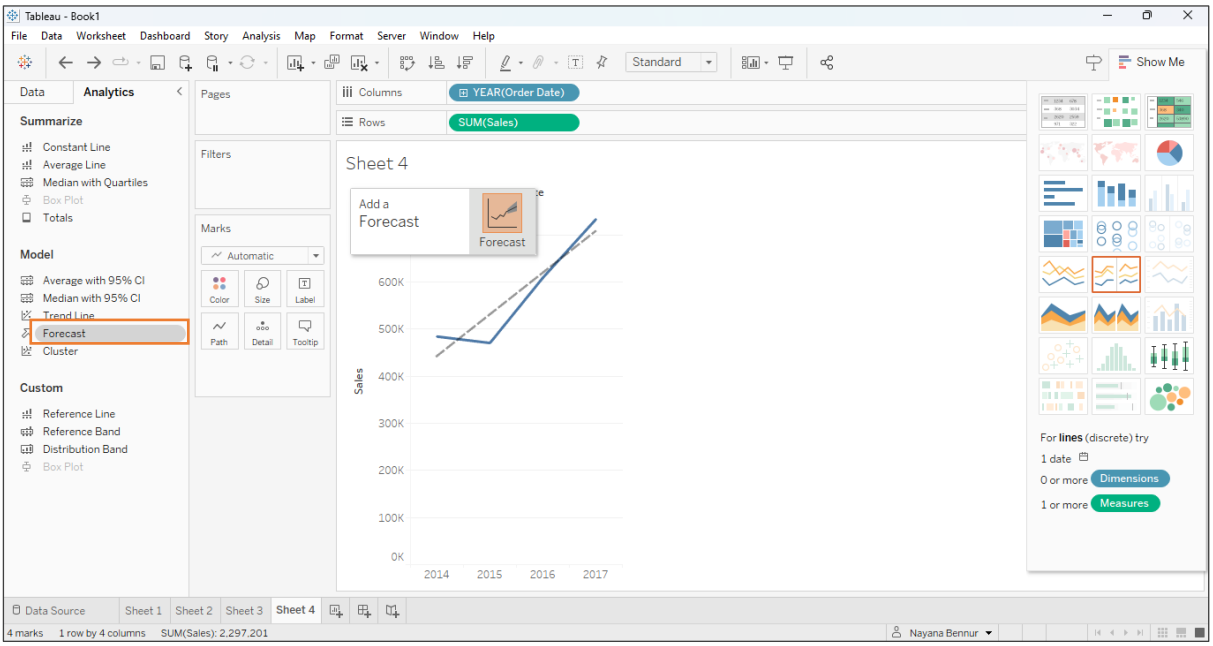


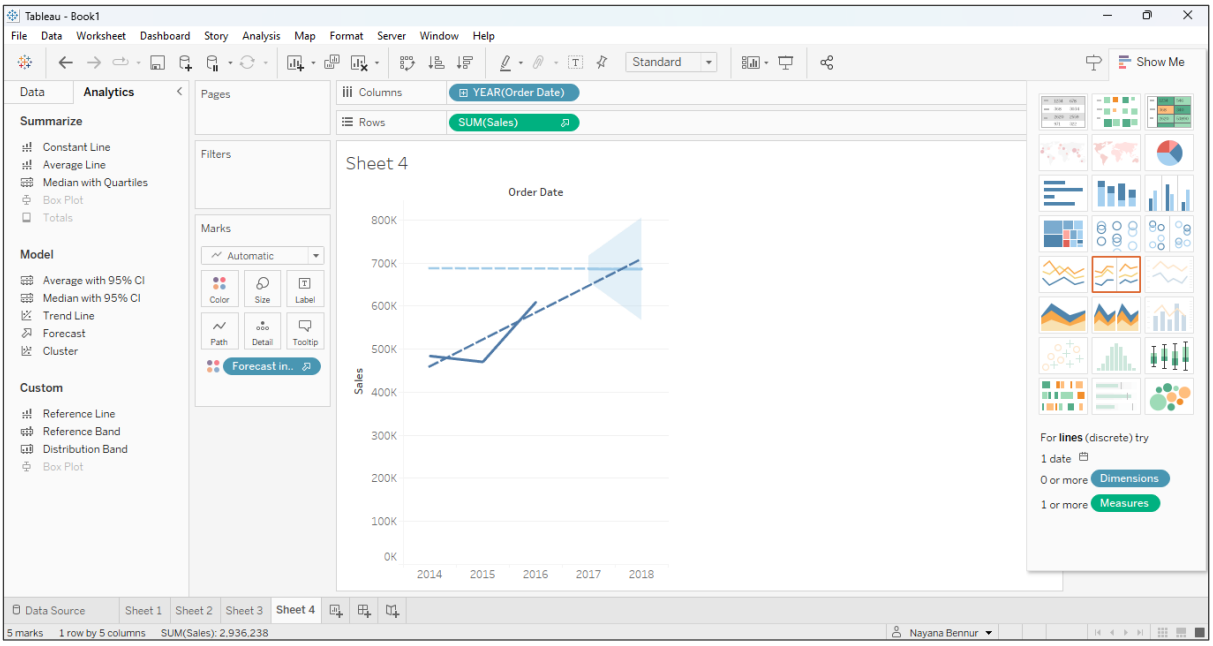
Observation: Sales trend increases over time.



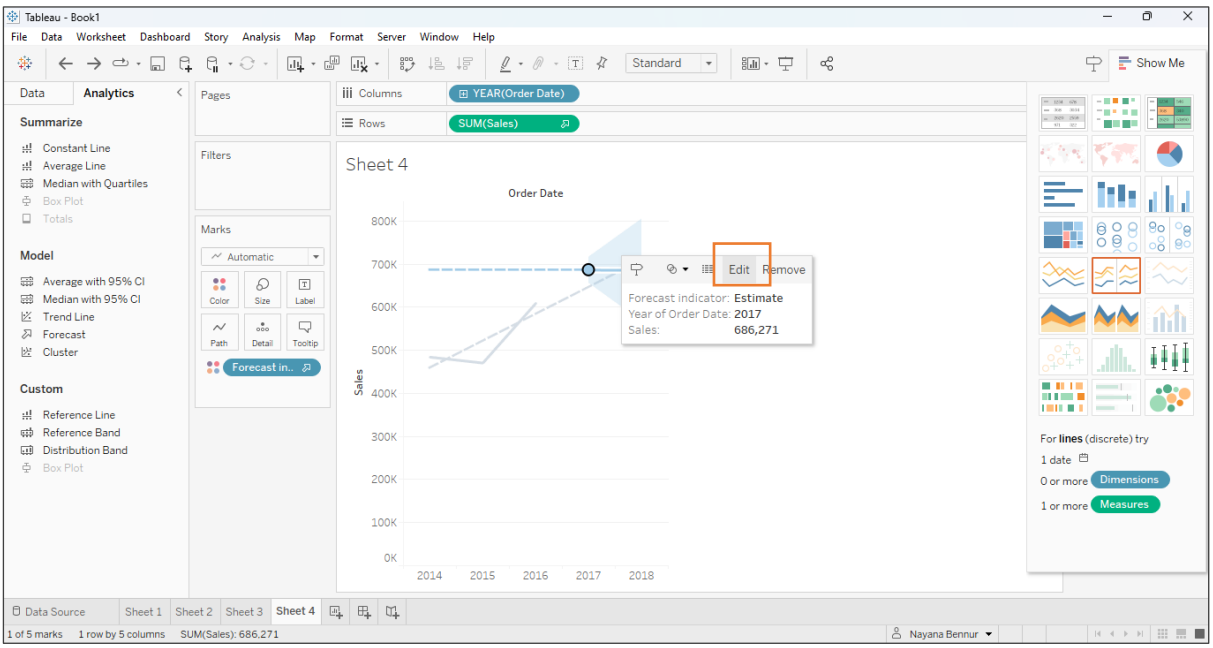
7. Forecasting

- From the **Analytics** pane, drag **Forecast**

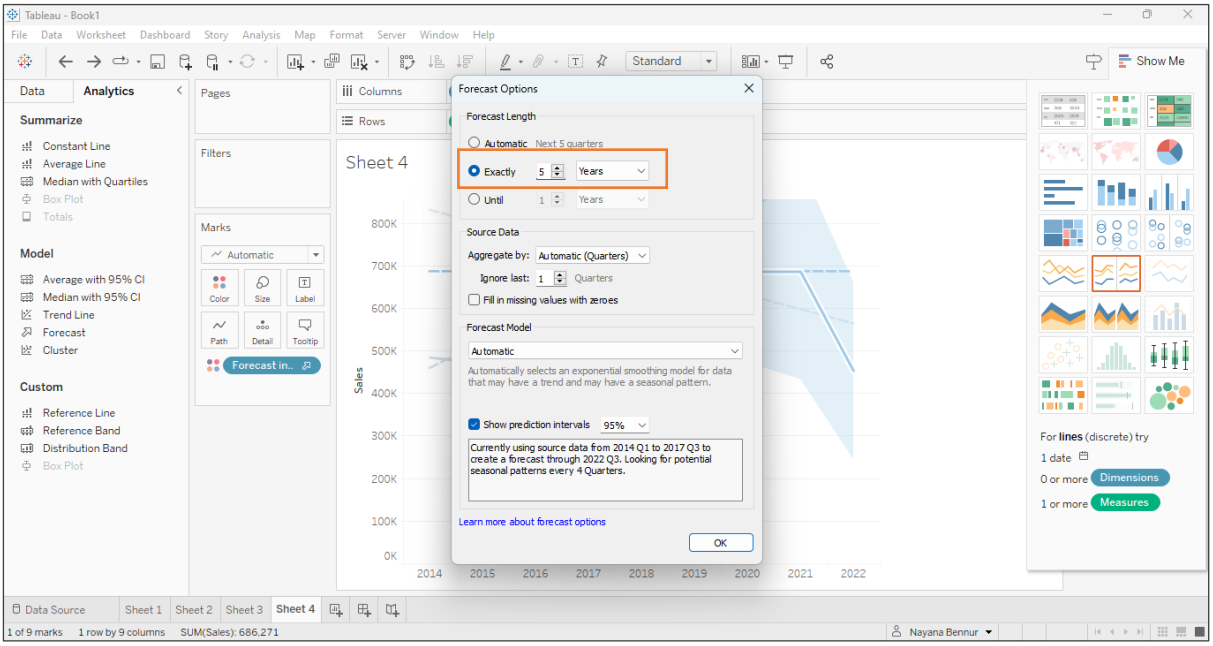


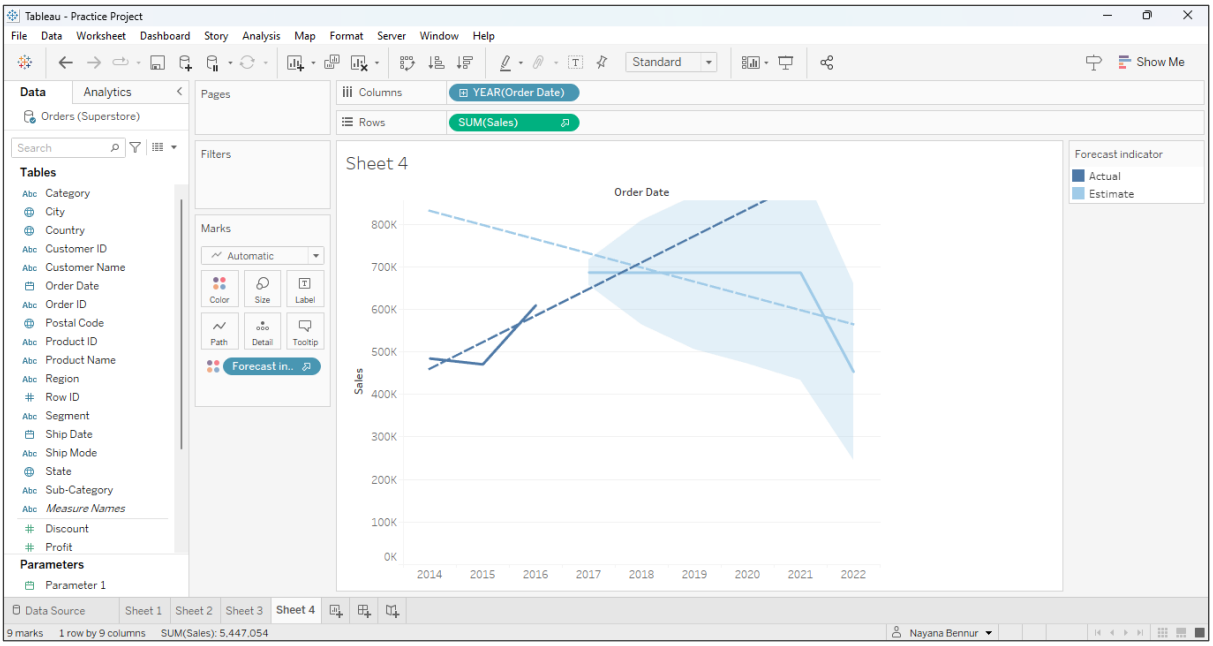


- Configure the forecasting options to predict future sales for 5 years, click on forecast line, and then click on **Edit**



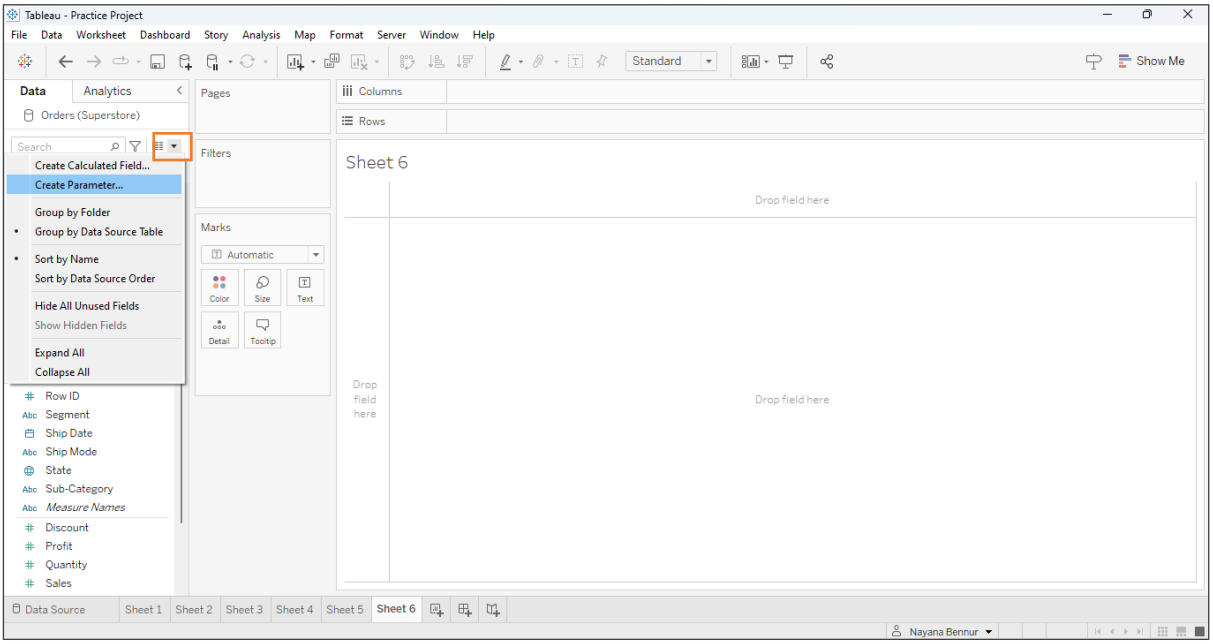
- Select **Exactly** under **Forecast Length** and make it **5 Years**



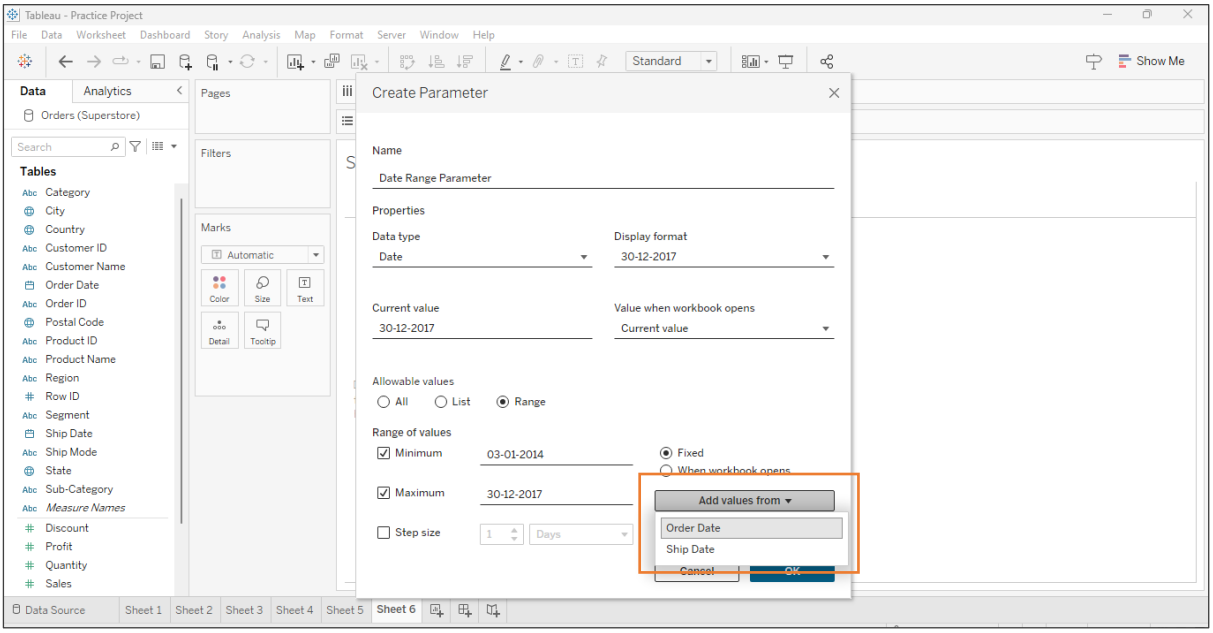


8. Parameters with Filters

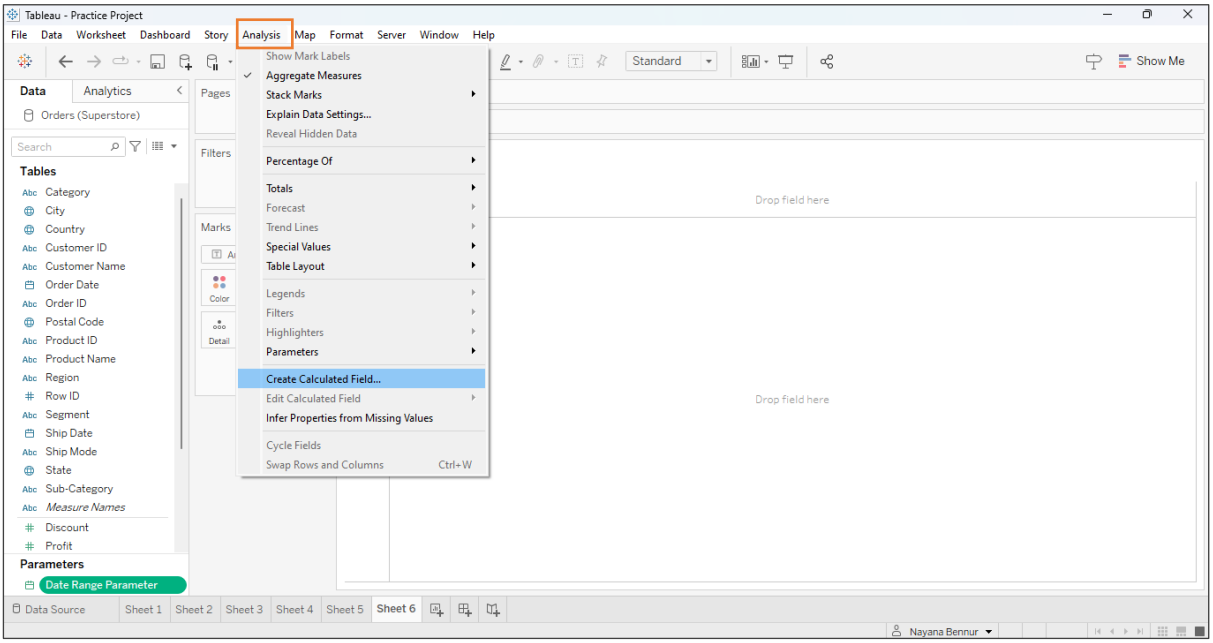
- Create the Date Range Parameter
  - Right-click in the data pane and select **Create Parameter**



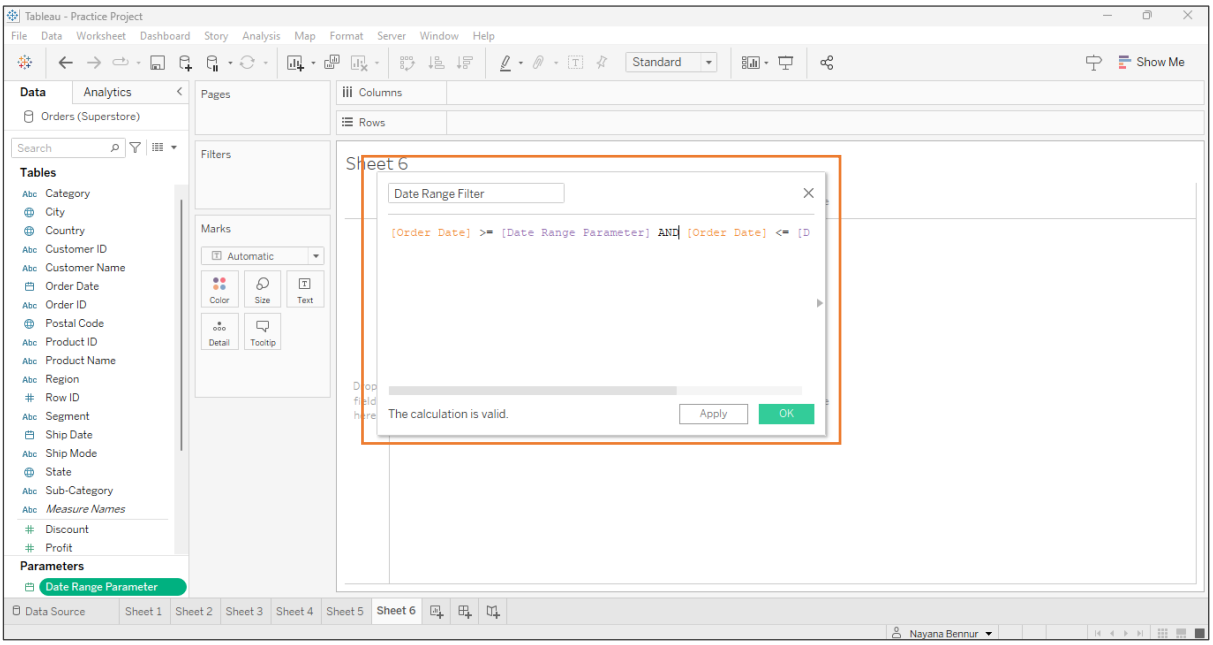
  - In the dialog box, name the parameter (example **Date Range**
  - **Parameter**)
  - Under **Data type**, select **Date**
  - Under **Allowable values**, select **Range**
  - Define the allowable range based on your dataset and click **OK**



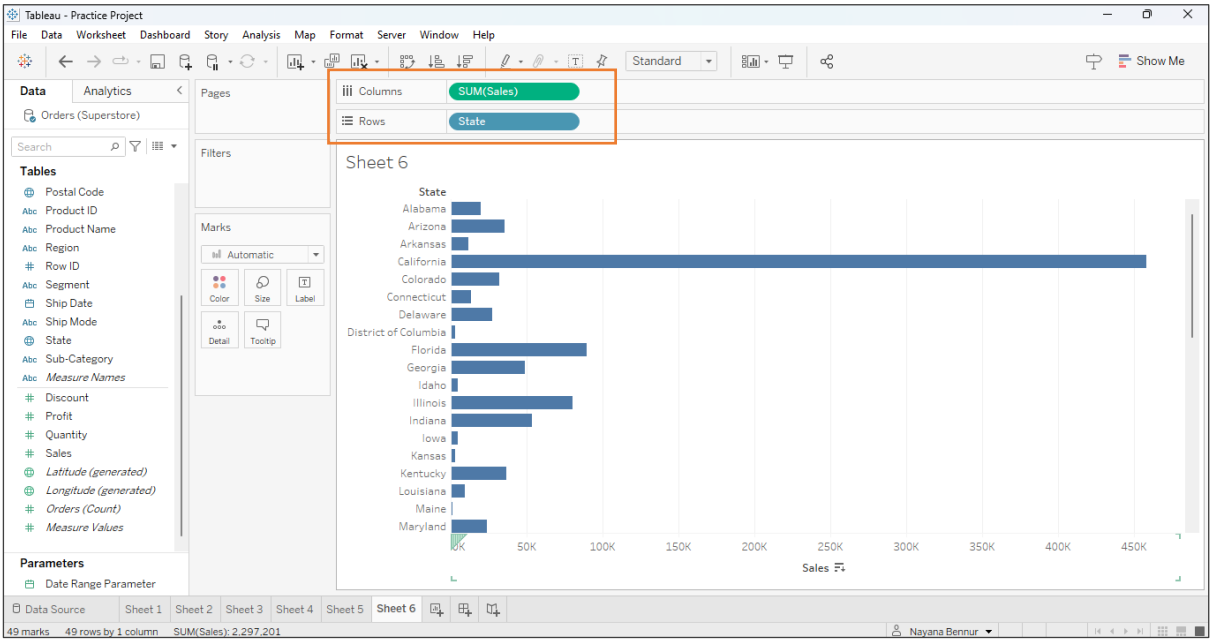
- Create the Calculated Field
  - Select **Analysis** and click on **Create Calculated Field**



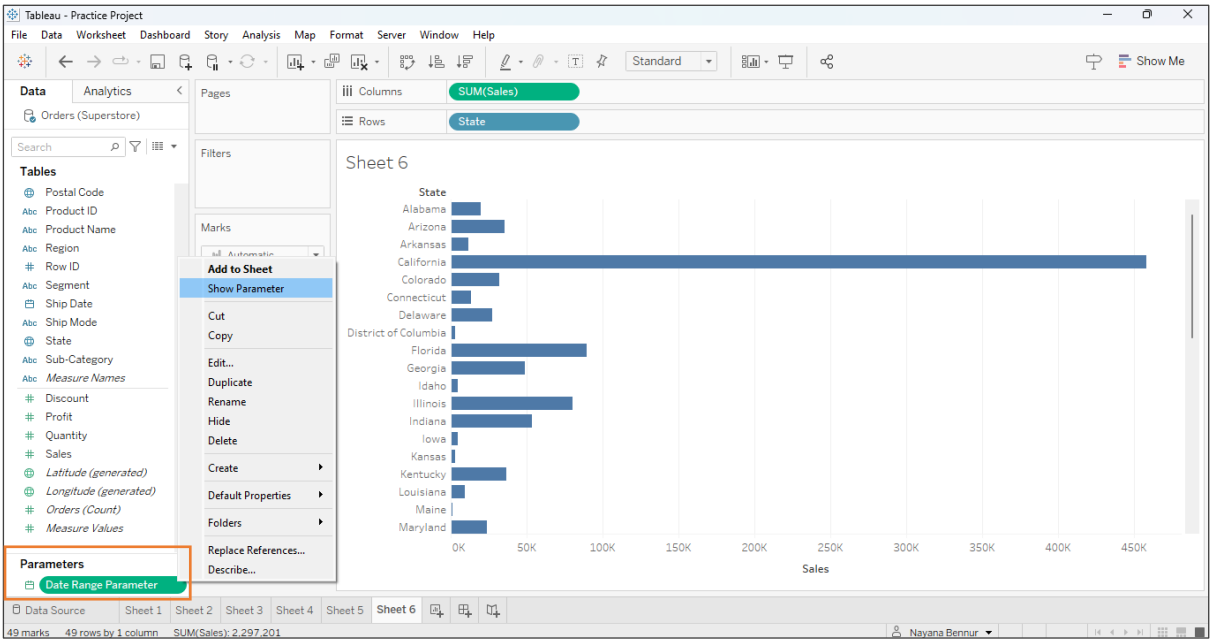
  - In the dialog box, name the calculated field (example **Date Range Filter**)
  - In the formula field, create a calculation: **[Order Date] >= [Date Range Parameter] AND [Order Date] <= [Date Range Parameter]**



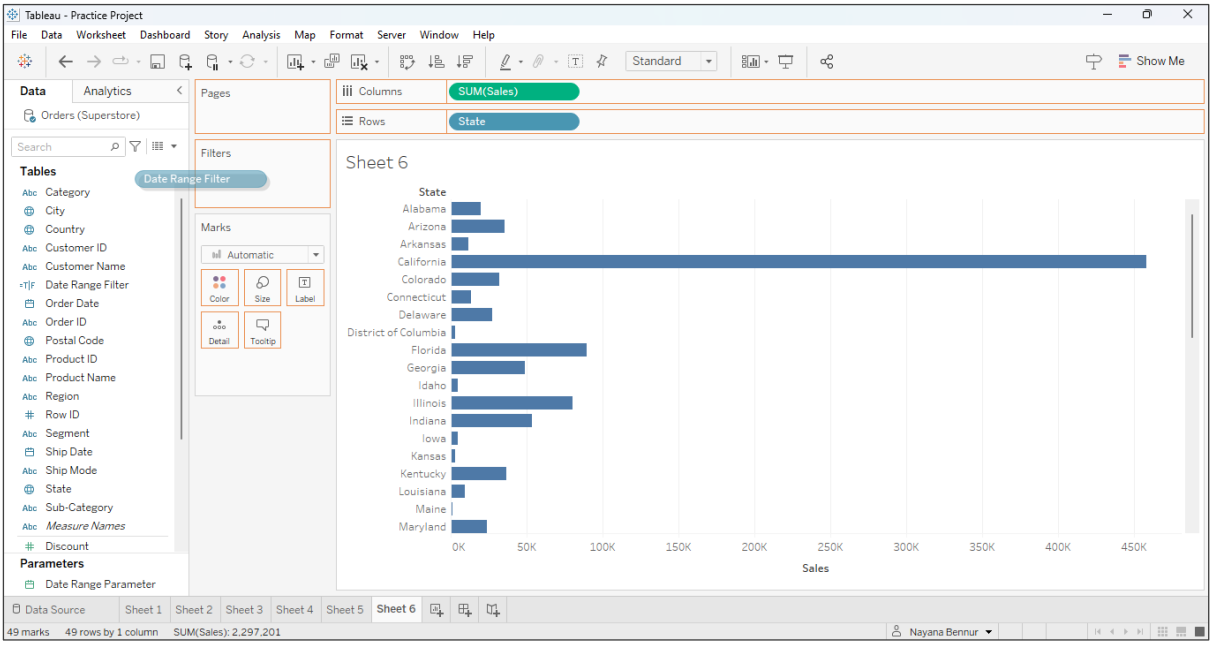
- Create the View
    - Drag **Sales** to the **Columns** shelf
    - Drag **State** to the **Rows** shelf



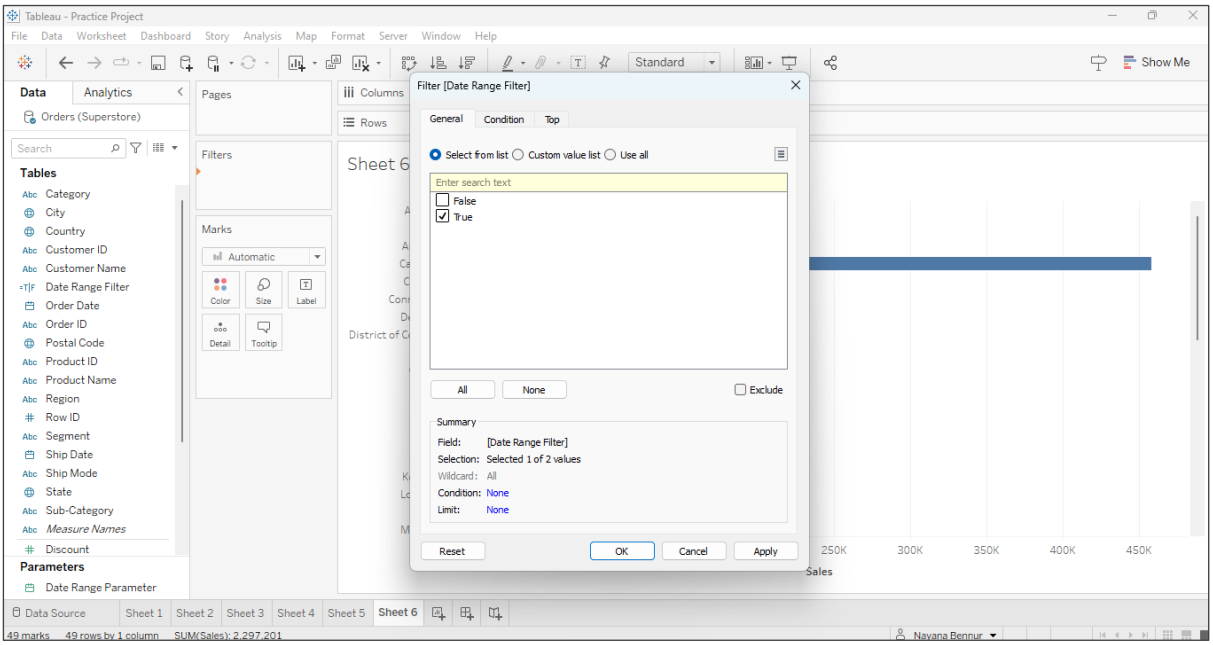
- Right-click on **Date Range Parameter** in the data pane and select **Show Parameter Control**



- Drag **Date Range Filter** to the **Filters** shelf



- In the Filter dialog, check **True** and click **OK**



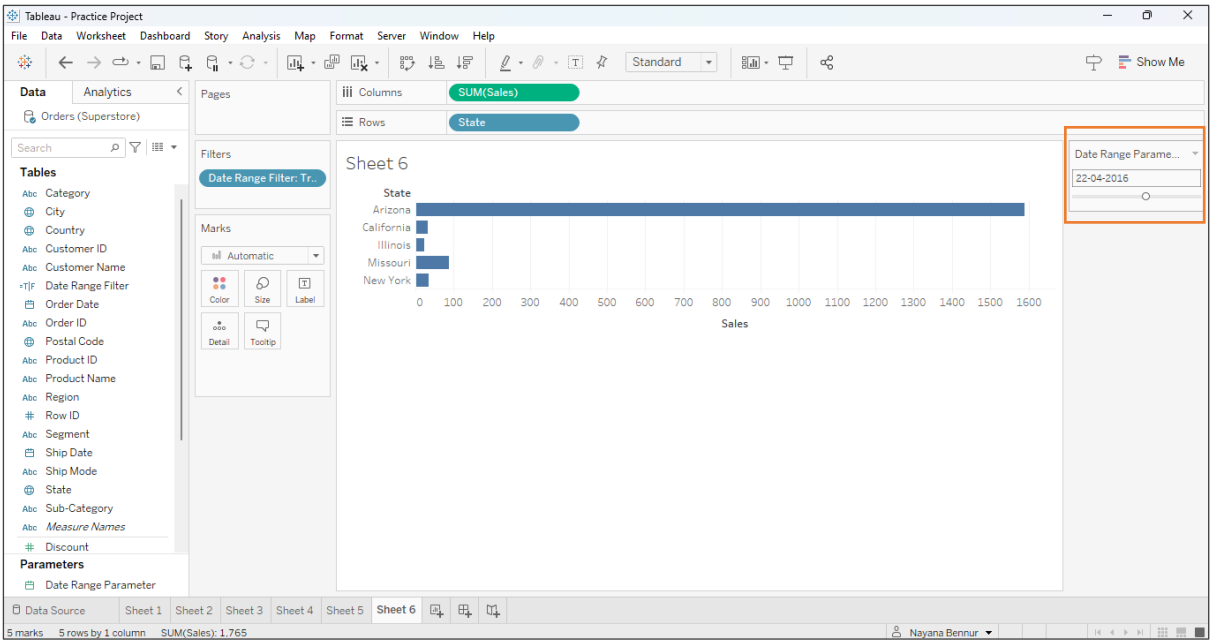


Tableau - Practice Project
File Data Worksheet Dashboard Story Analysis Map Format Server Window Help
Standard
Show Me
Data
Analytics
Orders (Superstore)
Search
Tables
Abc Category
City
Country
Abc Customer ID
Abc Customer Name
Date Range Filter
Order Date
Abc Order ID
Postal Code
Abc Product ID
Abc Product Name
Abc Region
Row ID
Abc Segment
Ship Date
Abc Ship Mode
State
Abc Sub-Category
Abc Measure Names
Discount
Parameters
Date Range Parameter
Pages
Filters
Date Range Filter: Tr..
Marks
Automatic
Color
Size
Label
Detail
Tooltip
Columns
SUM(Sales)
Rows
State
Sheet 6
State
Arizona
California
Illinois
Missouri
New York
0 100 200 300 400 500 600 700 800 900 1000 1100 1200 1300 1400 1500 1600
Sales
Date Range Parame...
22-04-2016
Data Source
Sheet 1
Sheet 2
Sheet 3
Sheet 4
Sheet 5
Sheet 6
5 marks
5 rows by 1 column
SUM(Sales): 1,765
Nayana Bennur