Lesson 03: Unlocking Data Potential with Tableau Filters

Overview

In this exercise, you will explore Tableau's filter capabilities and examine various types and functionalities of filters. By engaging in practical exercises with the provided superstore.xls dataset, you will deepen your understanding of filters' importance in data visualization. You will also learn how to apply different filter types effectively to refine your visualizations.

Instructions

- Work through all questions individually or within your group
- Divide your time evenly among the questions to ensure comprehensive understanding
- Utilize Tableau official documentation and online resources to enhance your problem-solving abilities
- Use **superstore dataset** for your reference

Task

As a data analyst tasked with optimizing sales performance for a retail business, your objective is to leverage Tableau's filtering capabilities to gain insights into customer behavior, product trends, and regional sales patterns. By effectively applying filters, you aim to identify actionable insights that can drive business decisions and enhance sales strategies.

Task 1: Import and extract Superstore dataset

- Open Tableau and navigate to the Connect section
- Select the Excel option and browse to locate the Superstore dataset (superstore.xls)
- Choose the file superstore.xls and click Open to import it into Tableau
- After importing the dataset, double right-click on Orders, People, and Returns in the Sheets section

- Click on Sheet1 and right click Order+(superstore). From the context menu, select Extract Data to create a local copy of the dataset.
- Click on Save Settings and click on Save to save it to your preferred location

Task 2: Analyze Superstore dataset

- Apply Data Source filter:
  - Navigate to the Data Source tab within Tableau
  - Click on Add next to the Filters section, then again click on Add
  - Click on the Category field, then again click on Add
  - In the filter dialog box, choose the Furniture category and apply it to the data source
- Apply Context filter:
  - Navigate to the Sheet1 tab within Tableau
  - Drag the Region field to the Filters shelf in Tableau and only include Central and East region
  - Right-click on the Region filter card and choose Add to Context
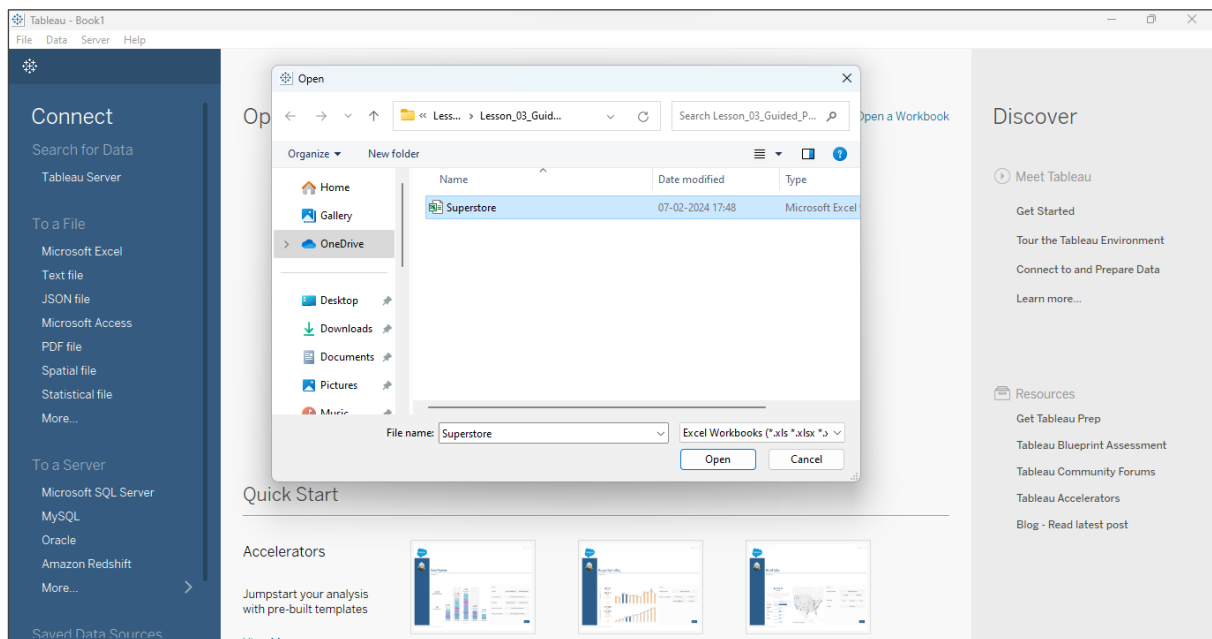
Discussion Questions (Optional)

If time permits, discuss the following questions:

- How can the strategic application of Tableau filters help retailers optimize inventory management and drive sales growth?
- How might the use of context filters in Tableau enhance the analysis of regional sales trends and customer demographics?
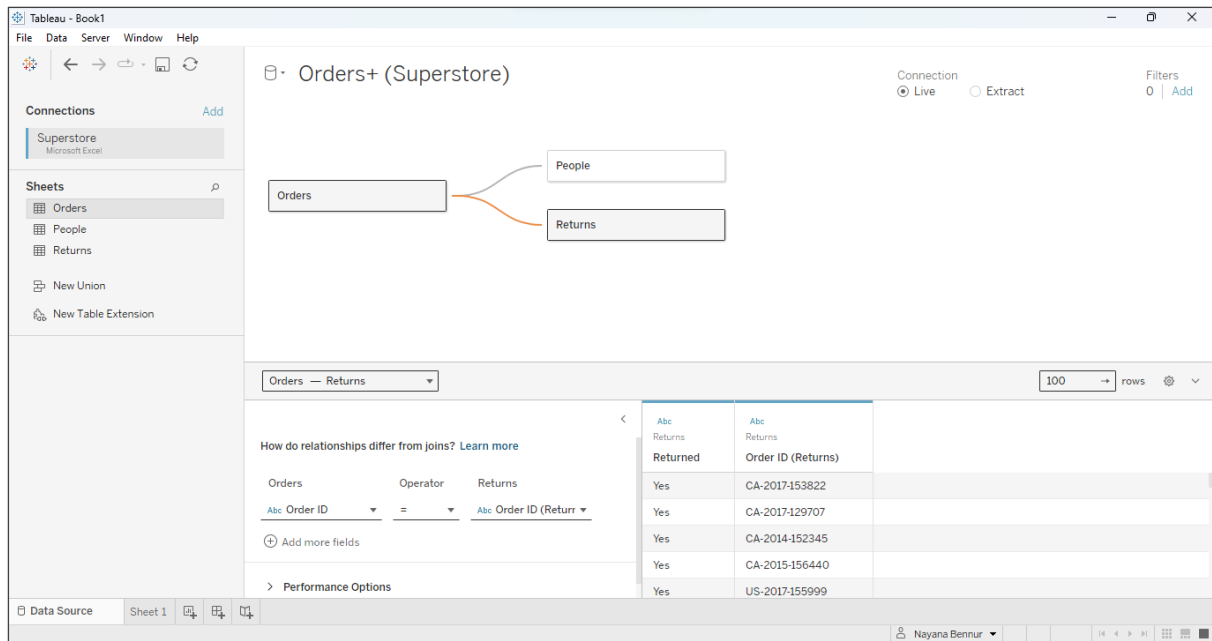
Answer Key

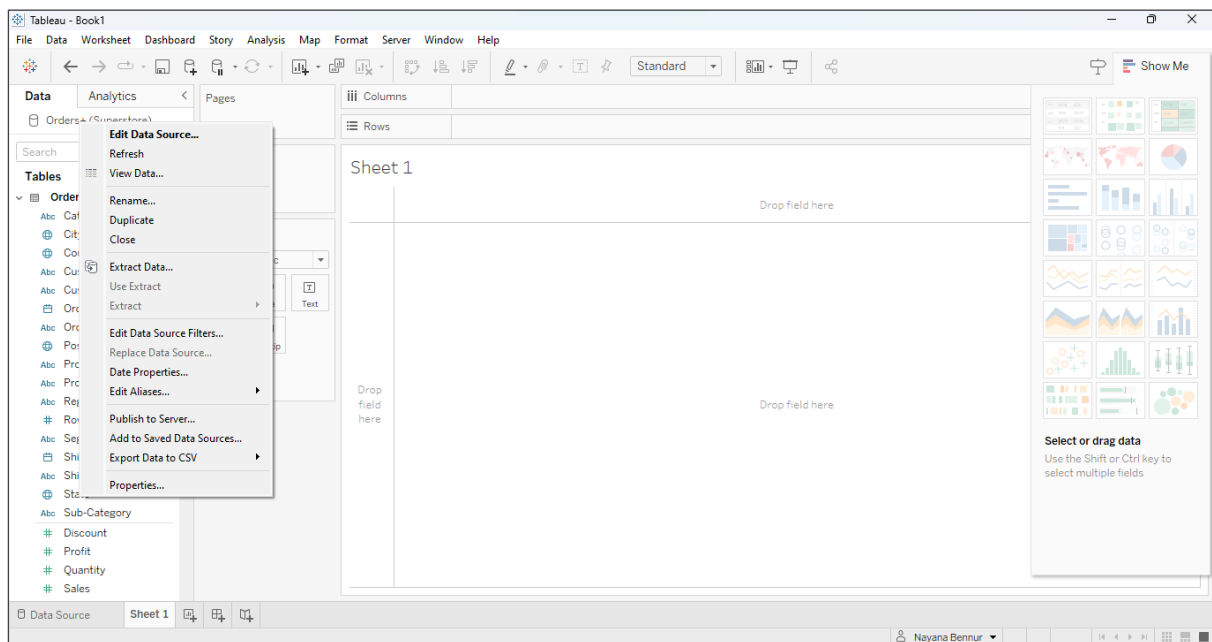## Task 1: Import and extract Superstore dataset

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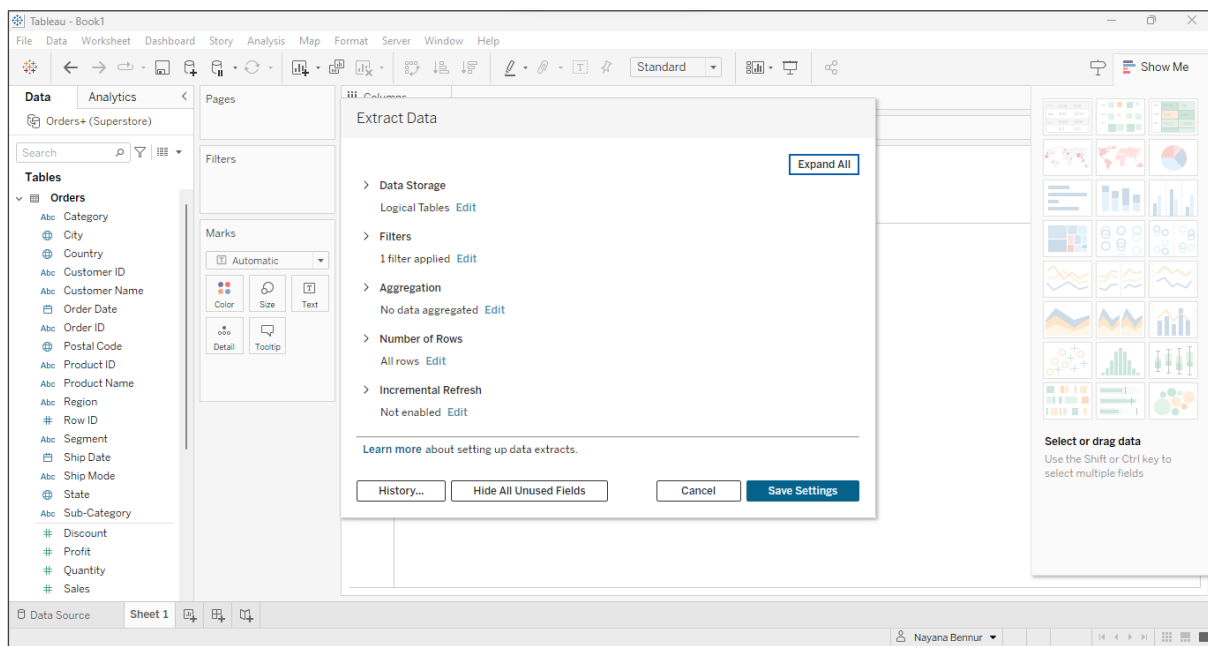

- After importing the dataset, double right-click on Orders, People, and Returns in the Sheets section
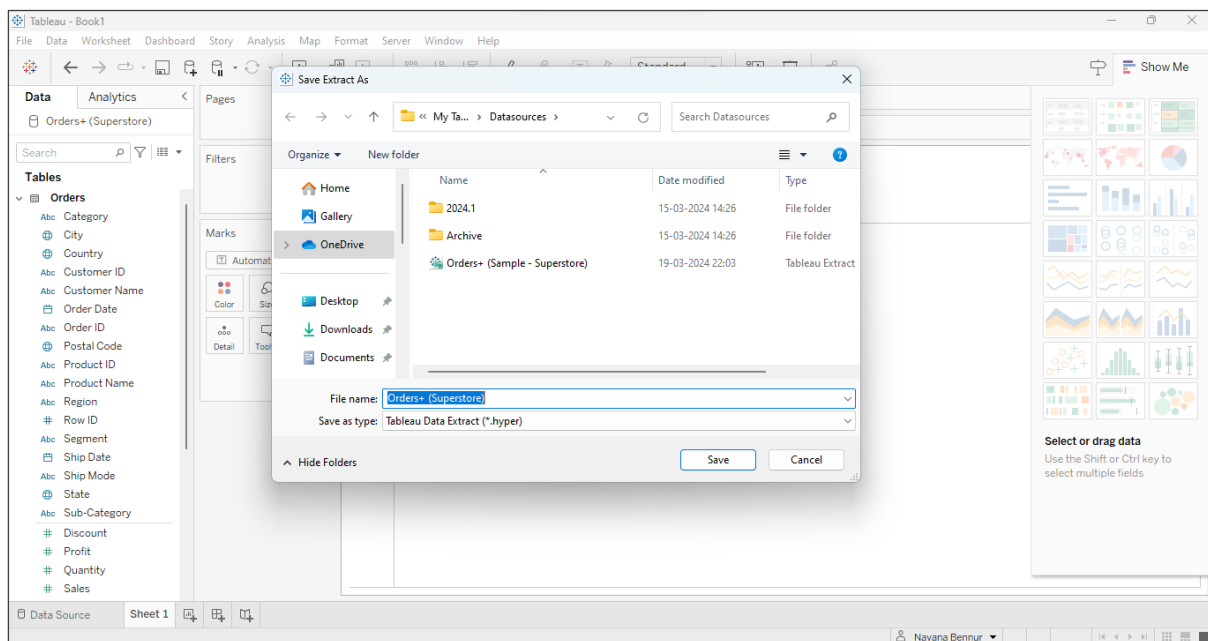
- Click on **Sheet1** and right click Order+(superstore). From the context menu, select Extract Data to create a local copy of the dataset.
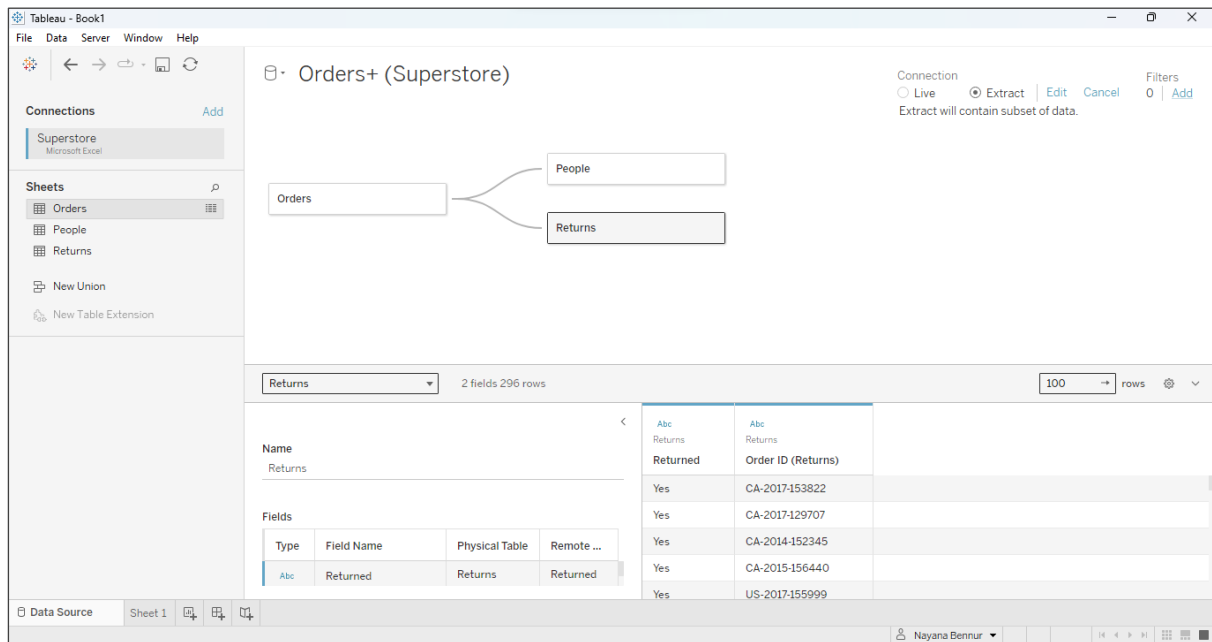
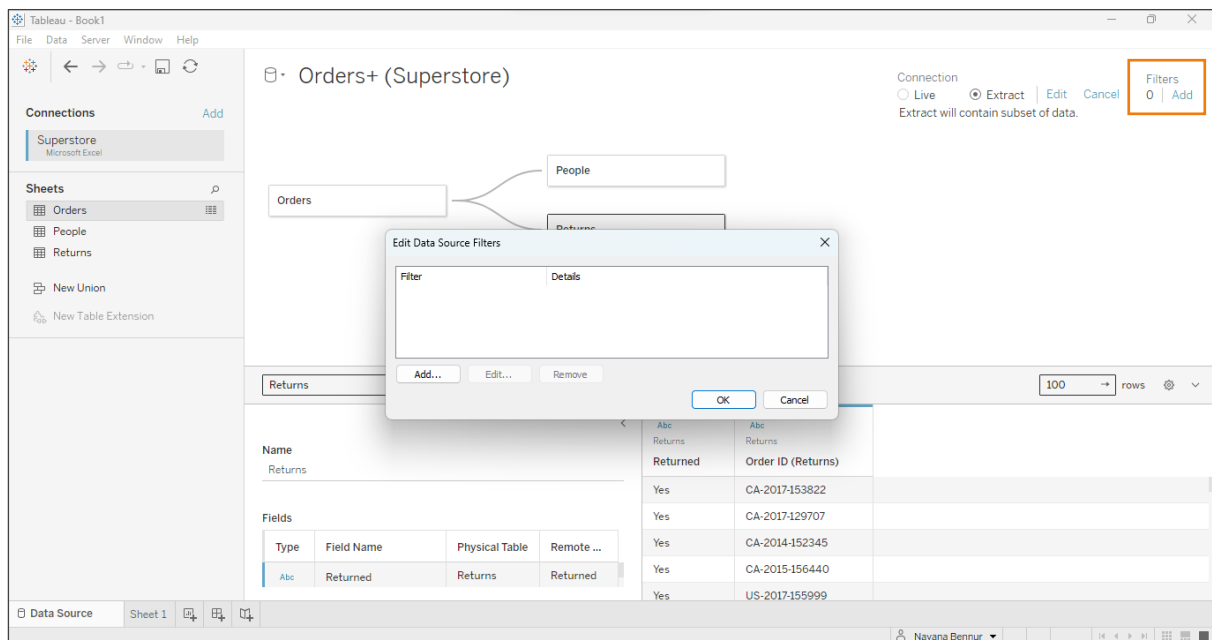- Click on **Save Settings**

- Click on **Save**

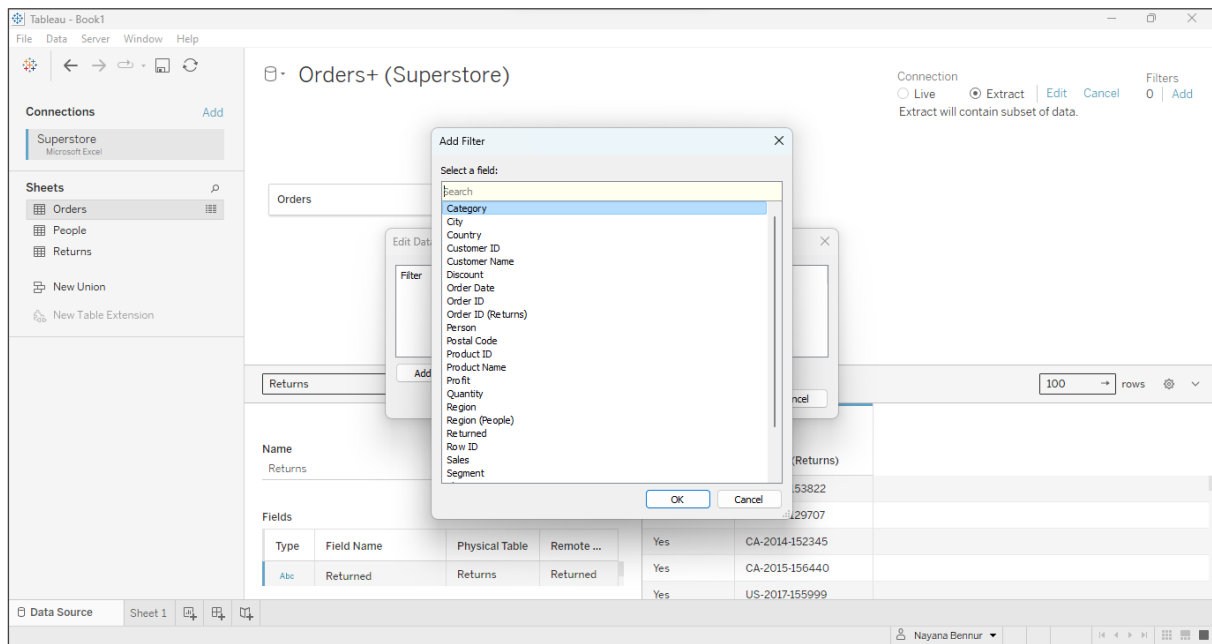## Task 2: Analyze Superstore dataset

- Apply Data Source filter:
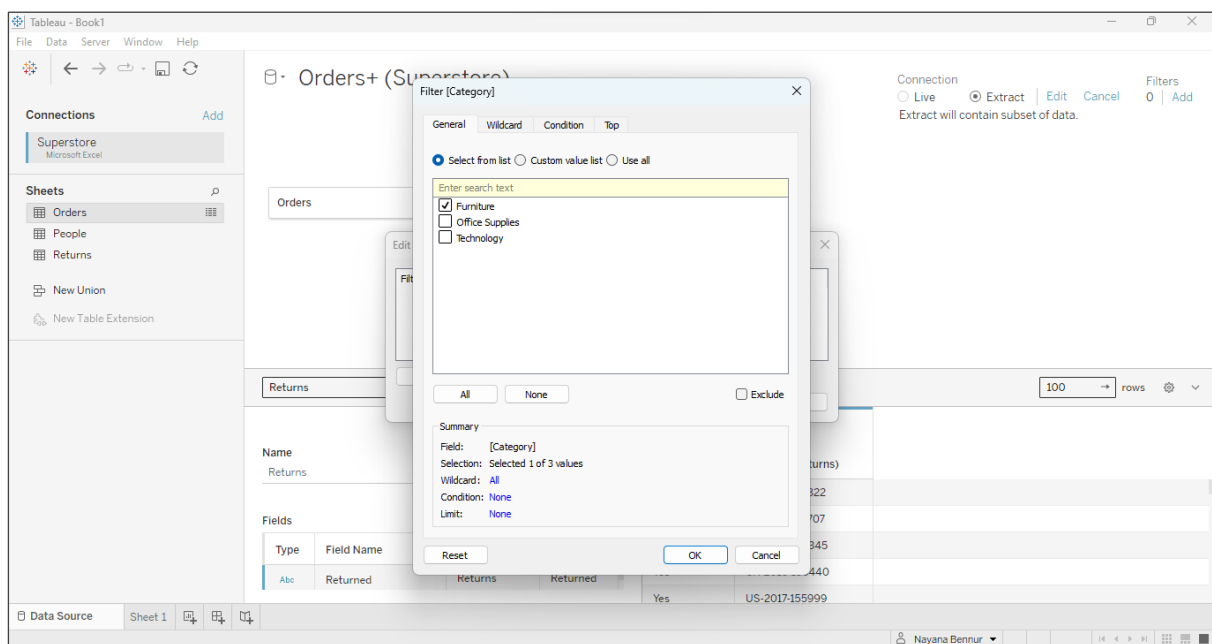 - Navigate to the Data Source tab within Tableau

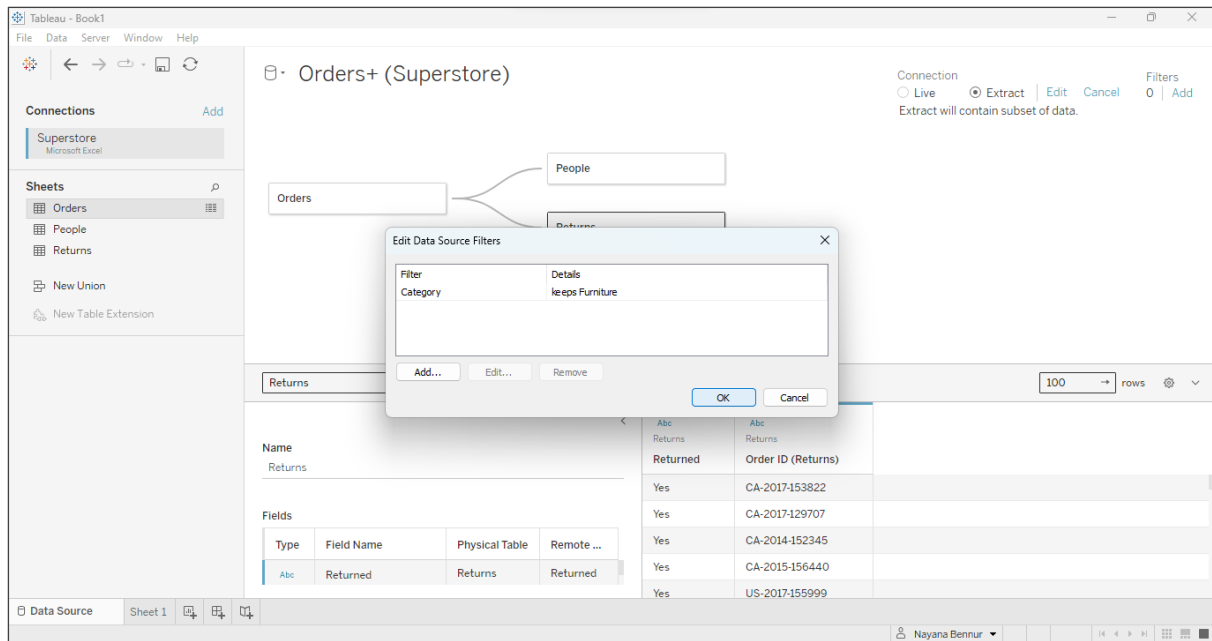- Click on **Add** next to the **Filters** section, then again click on Add

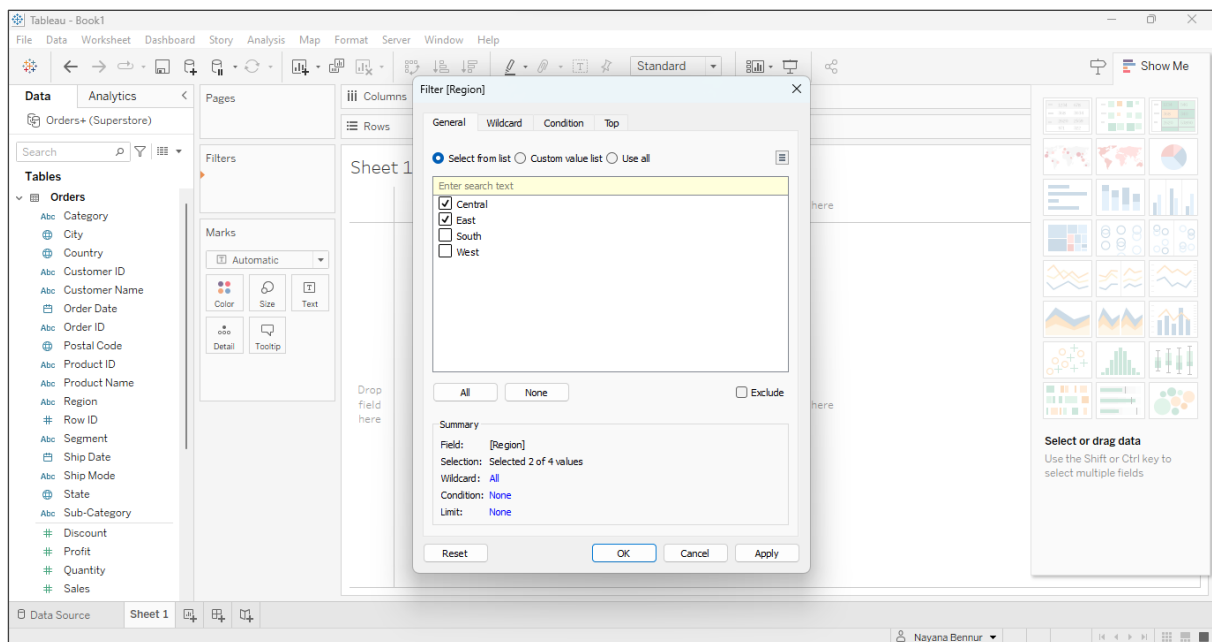o Click on the **Category** field, then again click on OK

o In the Filter dialog box, choose the **Furniture** category and apply it to the data source

- Apply Context filter:
  - o Navigate to the Sheet1 tab within Tableau
  - o Drag the **Region** field to the Filters shelf in Tableau and only include Central and East region

o Right-click on the **Region** filter card and choose Add to Context