

Assignment-2

Long Term Virtual Internship DataAnalytics using Tableau

1. PrepareDonutChart:

Step–01:CreateaNewSheetandRenamedas “Donut Chart”

Step–02:DragProductline-columnsselectonlyone

Step–03: ClickMarks card-Select Pie fromdropdown-Drag

- Product line → Colour
- Total → Angle
- Total → Label

Step–04:Create→CalculatedFieldNameit:DonutEnterformula:0ClickOK

Step – 05: Drag Donut → Rows (twice) (So Donut appears two times in Rows)

- Right-clickonsecondDonut→SelectDualAxis
- Right-click again→SynchronizeAxis

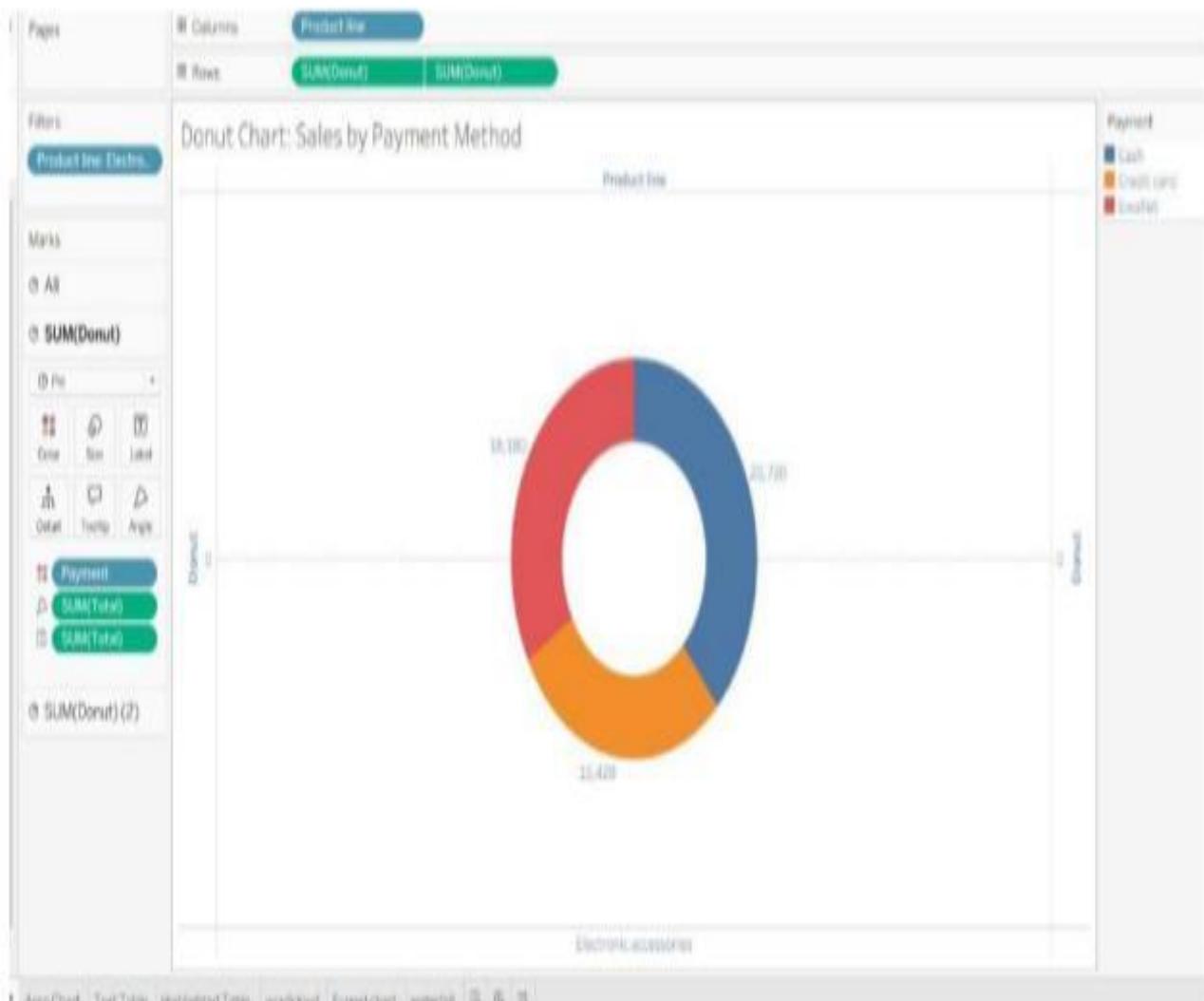
Step–06:FormatInnerCircle(Hole)FirstMarksCard(OuterPie) On

Marks(Donut)-Firstone:

- Type = Pie
- Product line → Colour
- Total→Angle
- Total→Label
- Increase Size
- On Second Marks Card (Inner Circle) - Click Second Marks (Donut)

Step – 07: Drag payment to colours

Donut chart: Sales by payment method



2. PrepareAreaChart:

Step- 01: Create a New Sheet and Renamed as “Area Chart”

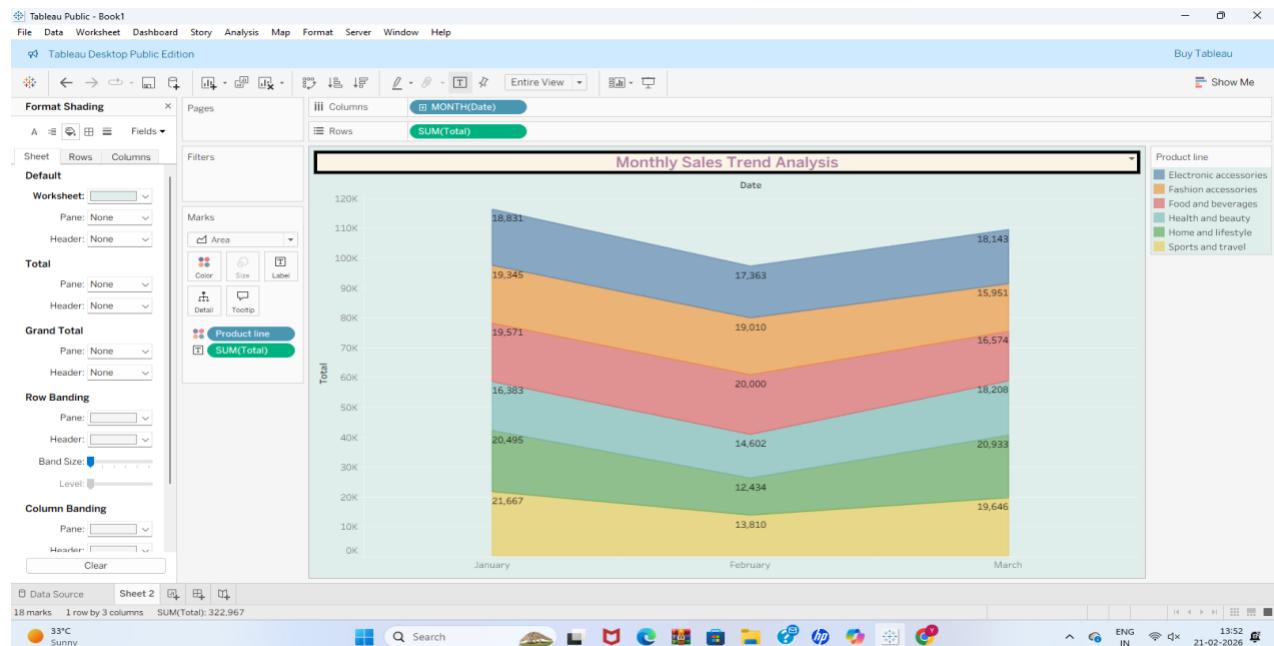
Step-02: Drag Date → Columns shelf - Click the drop-down on Date - Select Month

Step-03: Drag Total → Rows shelf

Step-04: Click Show Me (top right) Select Area Chart

Step-05: Drag city → Colour (in Marks card)

Area Chart: Monthly sales trend analysis



3.PrepareTextTable:

Step-01:CreateaNewSheetandRenamedas “Text Table”

Step-

02:Ontherightside,findShowMe.ClicktheTextTable(PivotTable)icon

Step-03: Drag

Date→Columnsshelf

Step - 04: From the Data Pane (left side), drag these fields to Rows

- Invoice ID
- Branch
- City
- Customer type
- Gender
- Product line
- Date
- Time
- Payments

Step-05:DragMeasurestoColumns(orText)

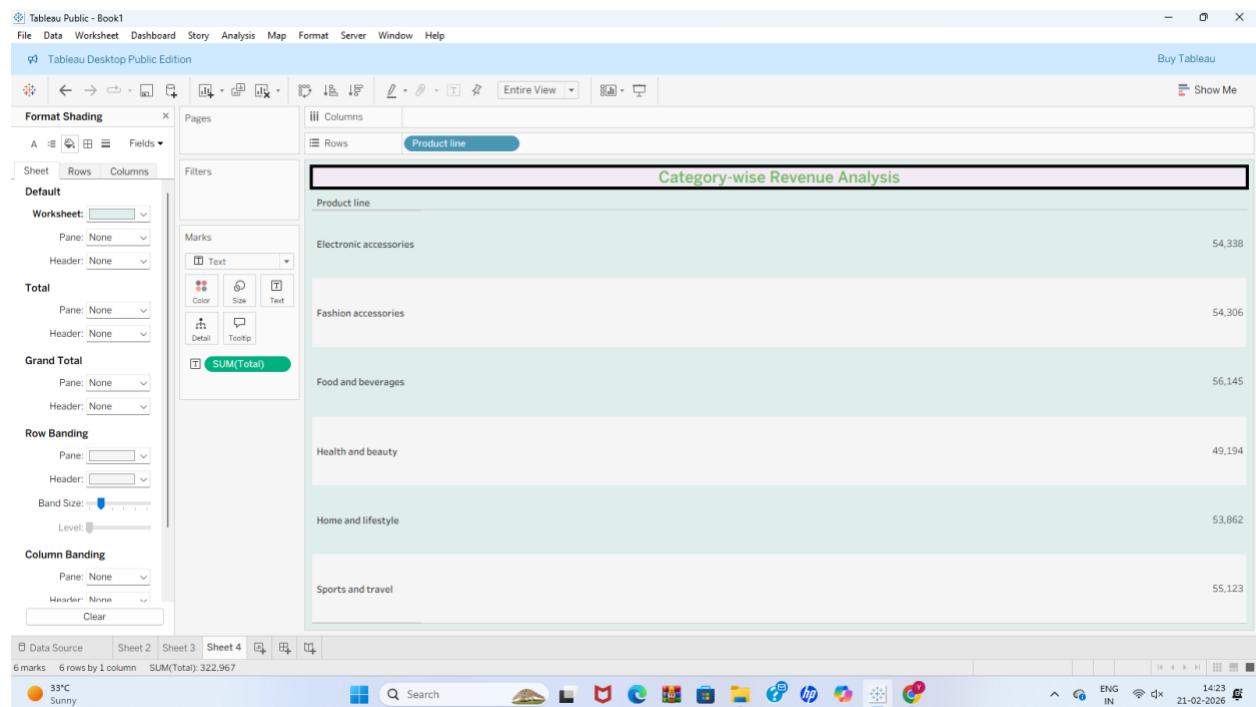
Step-06:NowdragtheseMeasures:ToColumns:

- Unitprice
- Quantity
- Tax
- Total
- COGS
- Grossincome
- Grossmarginpercentage

- Rating

Step-07: Set Marks Type to Text-On Marks Card, click the dropdown-Select Text Table

Text table: Category-wise revenue analysis



4. Prepare Highlighted Table:

Step-01: Create a New Sheet and Rename it as “Highlighted Table”

Step-02: Drag Product line → Rows

Step - 03: Drag Branch → Columns

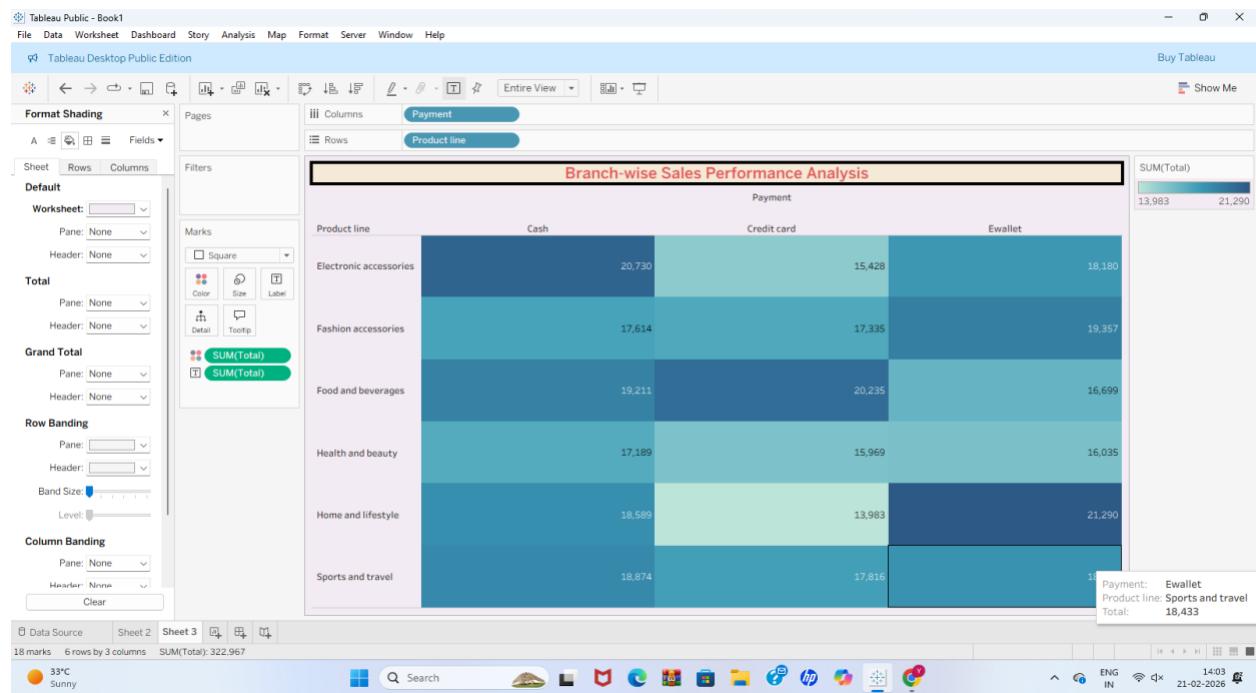
Step – 04: Drag Total → Marks → Colour On the Marks card, Click the drop-down → Select Square

Step-05: In Marks card → Size Drag slider to the right until squares fill the cells. Step – 06: Drag

Total → Label - Click Label → Show Mark Labels

Step-07: Click Colour → Edit Colours Choose a colour palette - Click Apply → Ok

Highlighted table: Branch-wise sales performance analysis



5.PrepareWordCloud:

Step–01:CreateaNewSheetandRenamedas“Word Cloud”

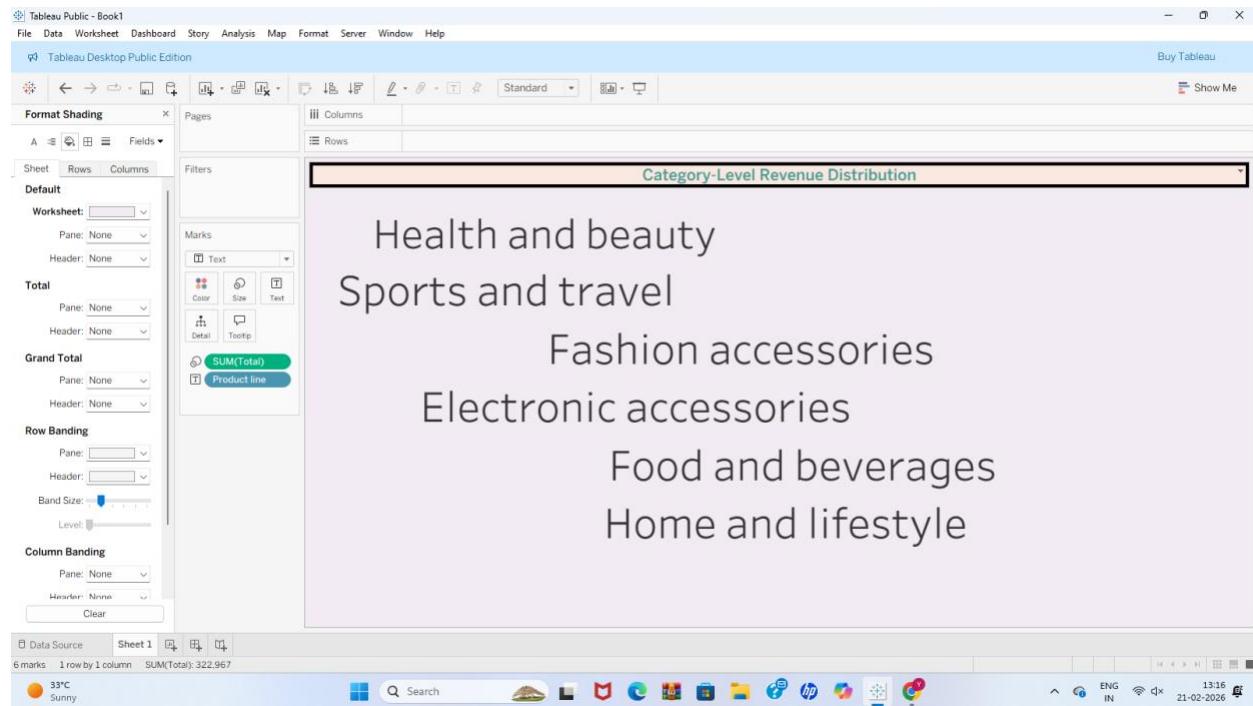
Step–02: In theMarks card-Clickthedropdown-SelectText.

Step – 03: Drag Product line → Drop on Text Click Text → Increase font size

Step–04:DragTotal→Drop onSize -ClickSize→Increaseslider

Step – 05: Drag Total → Drop on Colour

word cloud: Category-level revenue distribution



6.PrepareFunnelChart:

Step-01: Create a New Sheet and Rename it as “Funnel Chart”

Step-02:OnMarks Card-SelectBar

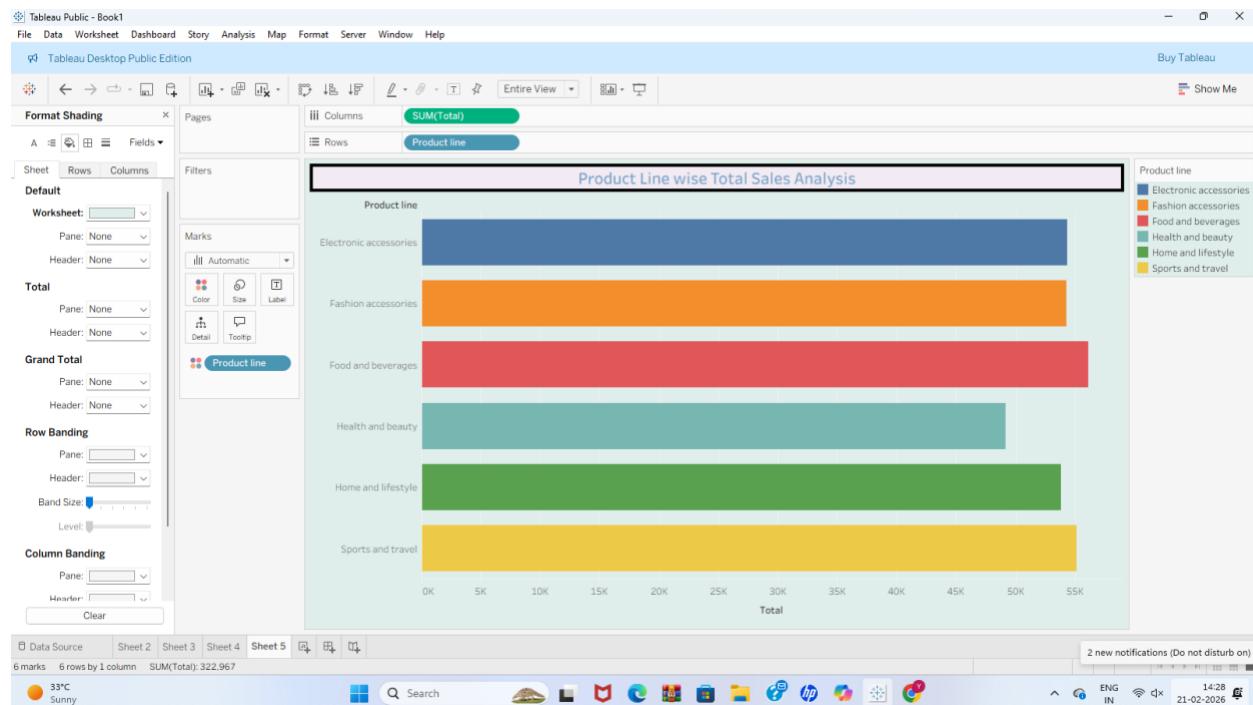
Step – 03: Drag Measure Values → Columns-Edit filters

Step – 04: Drag Measure Names → Rows-It automatically shows in filter

ClickSort→Descending(largesttosmallest)

Step-05: Rightclick on sheet - click on Format - GotoFormat Shading - click on worksheet - change colour.

Funnel Chart: Product line wise total sales analysis



7.PrepareWaterfallChart:

Step–01:CreateaNewSheetandRenamedas“WaterfallChart”

Step–02:DragProductline→Columns-SelectAll

Step – 03: Drag Running Total→ Rows

Step–04:ClickShowMe-SelectGanttBar

Step–05:Right-click→CreateCalculatedFieldName:Difference

Formula: $\text{SUM}([\text{Total}])$ -Click OK

Step – 06: Drag Difference → Size (Marks card) Step–07:

DragDifference→Colour

Waterfall Chart

Waterfall: Running total of sales by product line

