

# Creating Interactive Dashboards: MLS-2 Case Study

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## Business Context:

Guns & Roses is Australia's most well-known wine distributor. They provide a variety of wine brands and flavors. The firm's director requires immediate and up-to-date information for decision-making.

## Objective:

As a member of the analytics team, you are expected to create a dashboard containing customer, geography, and product-related information.

- **Geographical Overview**
- **Product Overview**
- **Customer Overview**

# DASHBOARD : 1

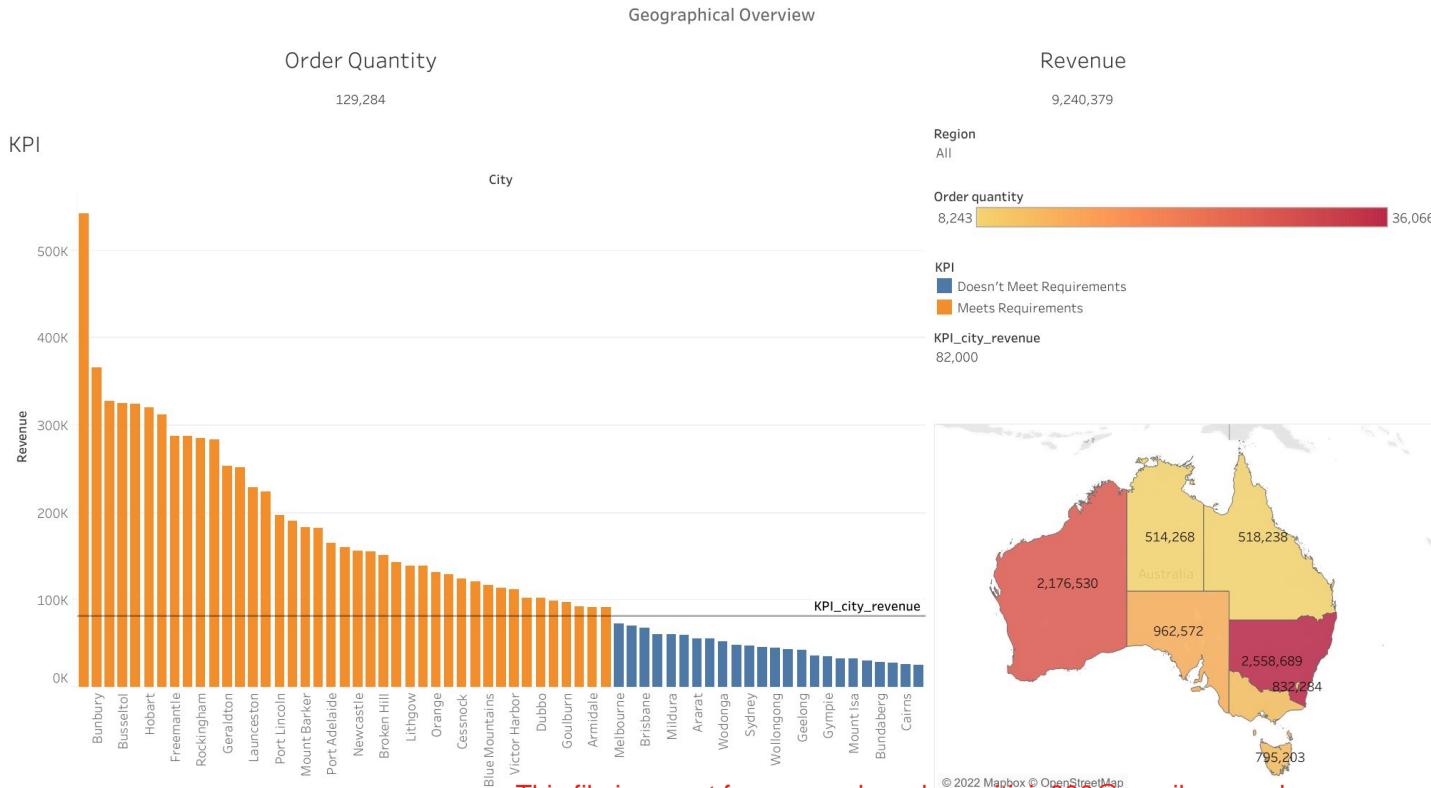
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# Geographical Overview

The below image is the dashboard of the geographical overview.



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# Geographical Overview

In order to create the Geographical Overview Dashboard, four sheets need to be created with the following information.

- Order Quantity
- Total Revenue
- Location map
- KPI

with the filters, parameters and marks respectively.

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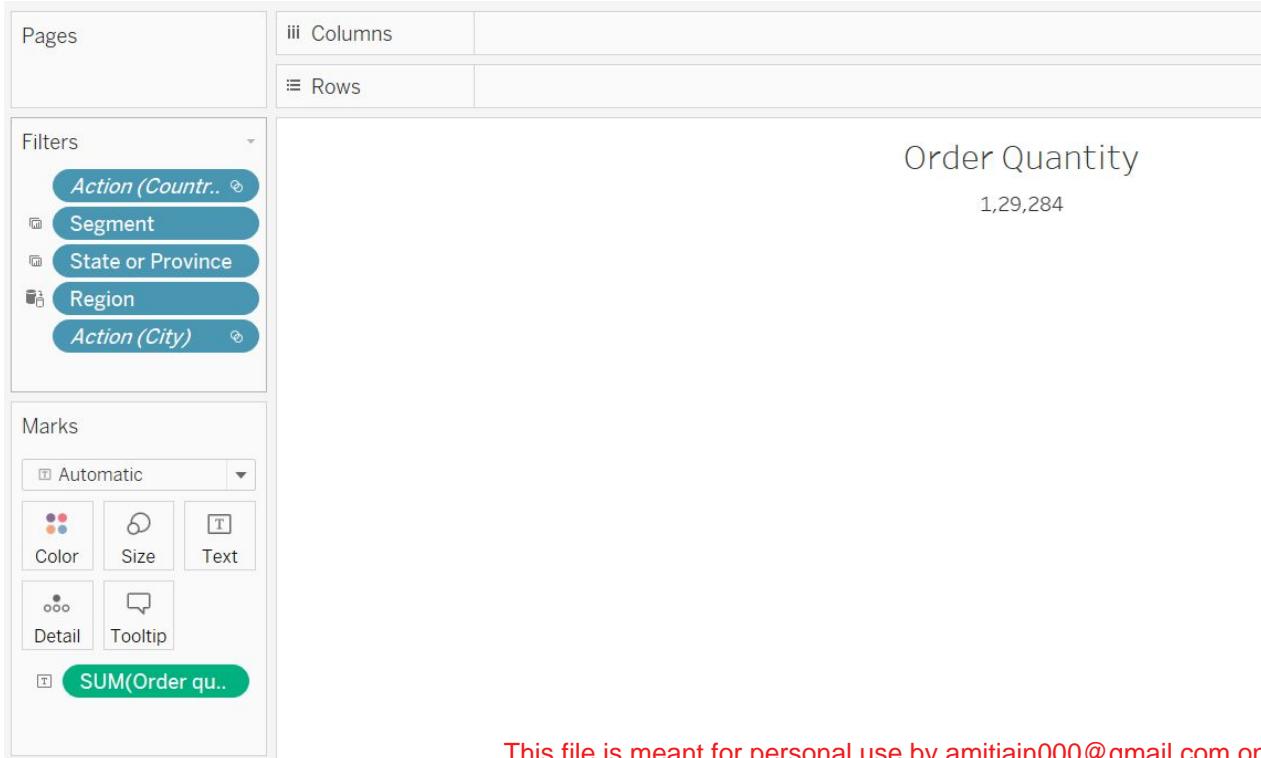
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# Geographical Overview

## Sheet-1: Learner

Below Image is the expected sheet result for the Order Quantity



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# Geographical Overview

## Sheet-1: Order\_quantity

Drop the **Order quantity** to "text marks" and make sure the options displayed in the image are selected in order to display the desired result.

The screenshot shows the Tableau Public interface with the following details:

- Top Bar:** File, Data, Worksheet, Dashboard, Story, Analysis, Map, Format, Window, Help.
- Left Sidebar (Tables):** Segment, Sub Segment, Measure Names, Calculation1, Discount %, Freight expense, KPI, Order quantity, Order/Revenue, Quantity Target, Revenue, Revenue Target, Unit Price, What if Revenue, Latitude (generated), Longitude (generated).
- Left Sidebar (Parameters):** [Order / Revenue]\_Para, growth\_rate, KPI\_city\_revenue, Top Customer.
- Middle Area:** Pages, Columns, Rows, Filters (Action (Country), Segment, State or Province, Region, Action (City)), Marks (Automatic, Filter..., Show Filter, Apply to Worksheets, Format..., Dimension, Attribute, Measure (Sum) selected, Discrete, Continuous, Edit in Shelf).
- Right Area:** Order Quantity, 1,29,284.

A red box highlights the context menu on the Marks shelf, specifically the 'Continuous' option under 'Measure (Sum)'.

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# Geographical Overview

## Sheet-2: Revenue

In a similar way, create a sheet for the “Revenue” as well, with the following options checked as shown in the image.

The screenshot shows a Tableau Public dashboard titled "MLS-week2". The top navigation bar includes File, Data, Worksheet, Dashboard, Story, Analysis, Map, Format, Window, and Help. The main interface features a "Data" tab selected, showing a single data source named "wine\_Sales - Raw Data". The "Tables" pane lists various dimensions and measures such as Segment, Sub Segment, Measure Names, Calculation1, Discount %, Freight expense, KPI, Order quantity, Order/Revenue, Quantity Target, Revenue, Revenue Target, Unit Price, What if Revenue, Latitude (generated), Longitude (generated), and Parameters. The "Marks" card is set to "Automatic". A context menu is open over a dimension in the Marks card, with the "Include in Tooltip" option highlighted and checked. The main visualization area displays a single value: "Revenue" with a value of "9,240,379".

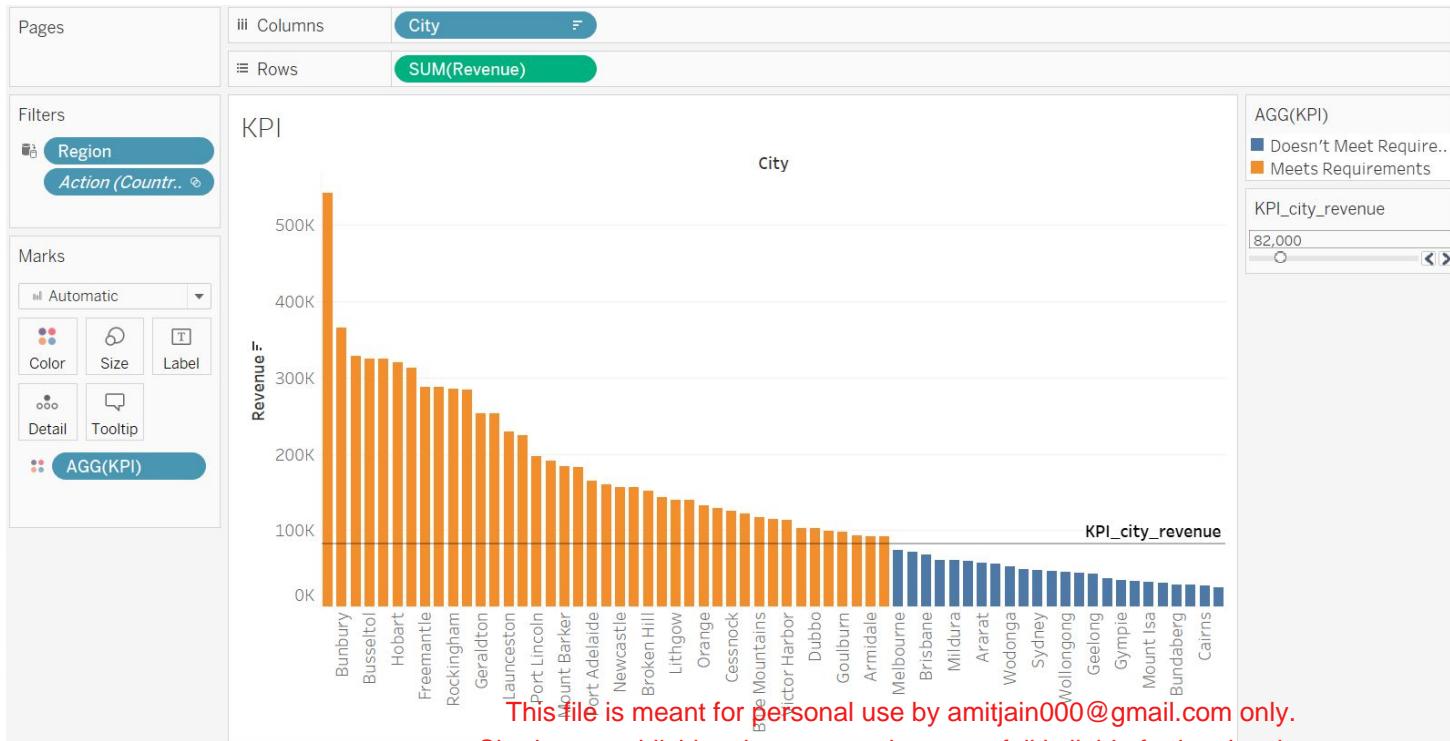
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# Geographical Overview

## Sheet-3: KPI

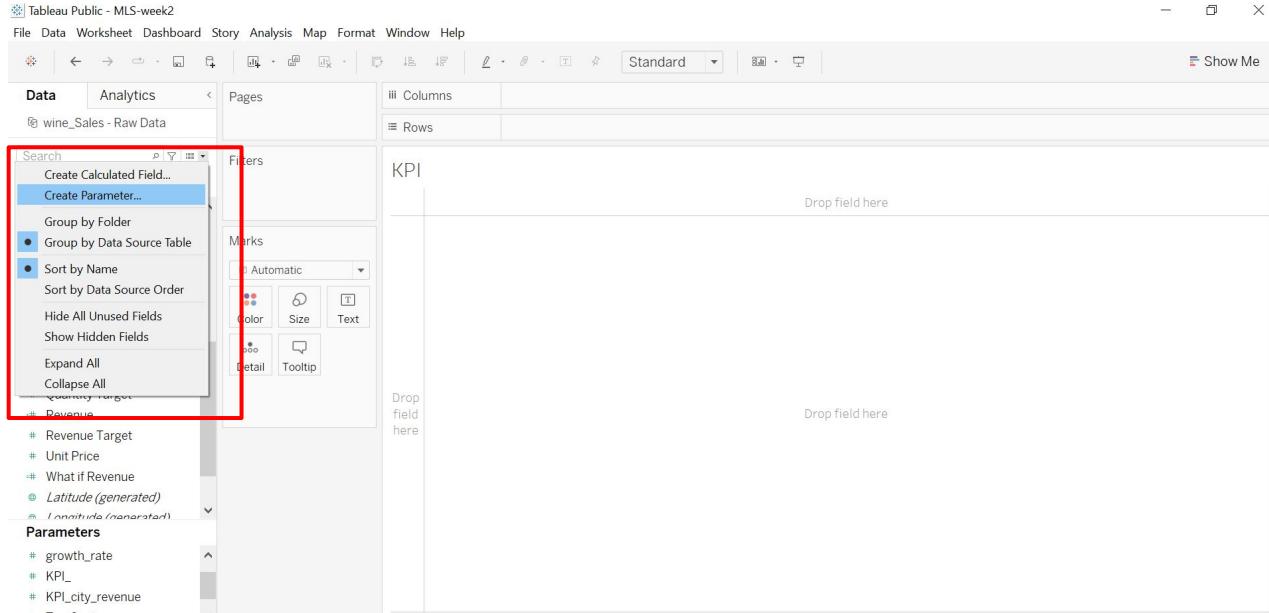
The image below is the expected sheet result. It's a bar chart with the parameter field and filters in it.



# Geographical Overview

## Step-1:

The image below shows, Where to find the “Create Parameter”.



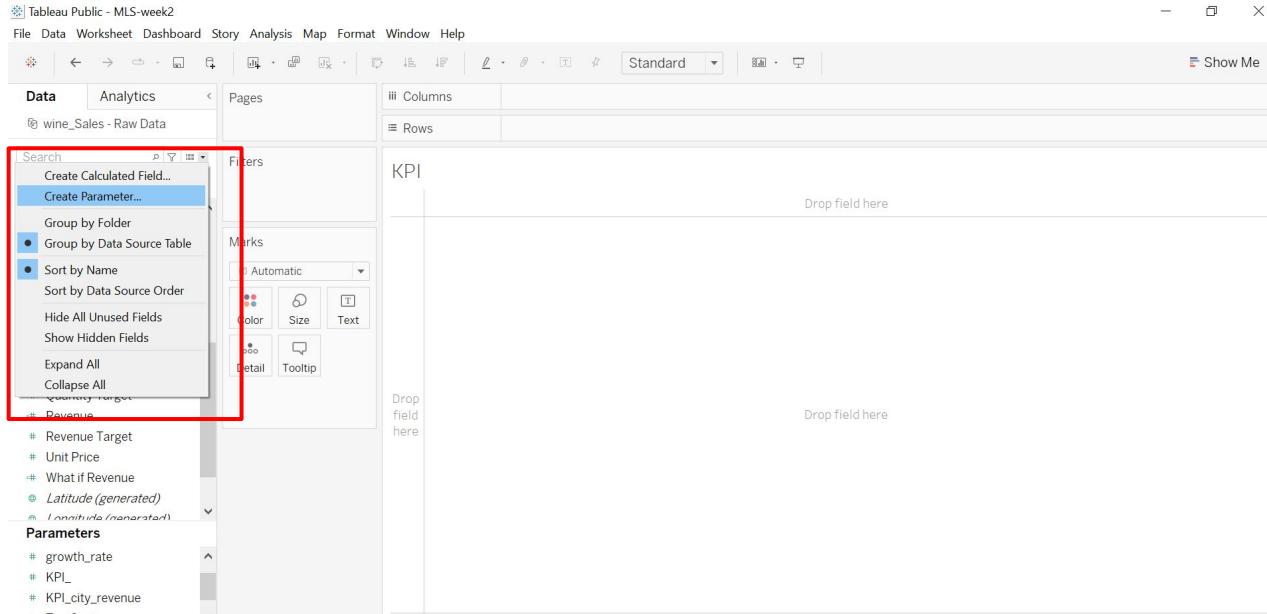
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# Geographical Overview

## Step-2:

The image below shows, Where to find the “Create Parameter”.

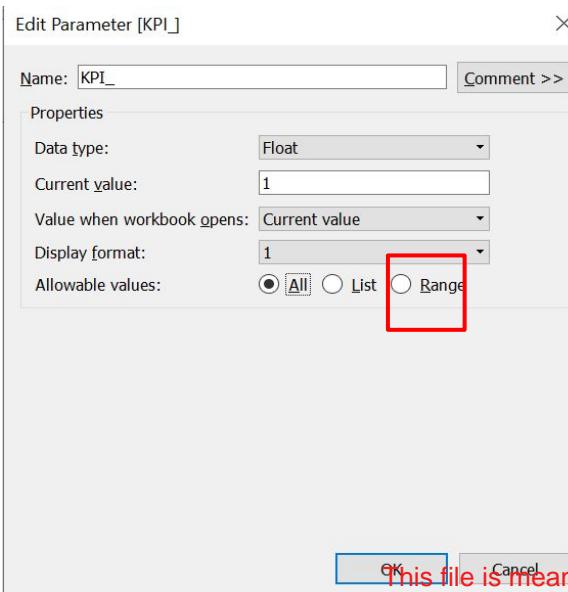


# Geographical Overview

## Step-3:

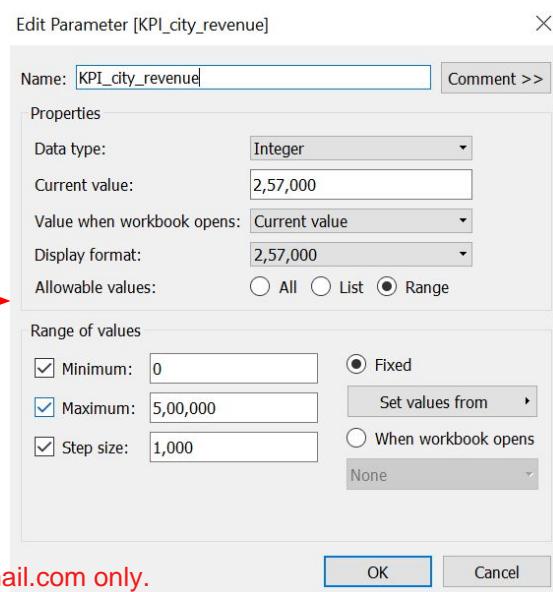
Once you Click “Create Parameter” button a window open as shown below image-1. Give it a name as “KPI\_city\_revenue”, Make sure all the options are filled as shown in **image-2**

**Image-1**



Make sure all the information are Updated as shown in **image-2**

**Image-2**



# Geographical Overview

## **Step-4:**

Now you can find the KPI\_city\_revenue in the parameters section as shown below and make sure options are selected.

The screenshot shows the Tableau Public interface with a context menu open over a parameter named "KPI\_city\_revenue". The menu options include "Add to Sheet", "Show Parameter" (which is selected and highlighted in blue), "Cut", "Copy", "Edit...", "Duplicate", "Rename", "Hide", "Delete", "Create", "Default Properties", "Folders", "Replace References...", and "Describe...". A red box highlights the "Parameters" section in the left pane, and a green box highlights the "KPI\_city\_revenue" parameter in the list. A red arrow points from the "Parameters" label to the "KPI\_city\_revenue" item. At the bottom of the screen, there is a watermark message: "This file is meant for personal use by amitjain000@gmail.com only. Sharing or publishing the contents in part or full is liable for legal action".

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# Geographical Overview

## Step-5:

Next, create a calculated field for the KPI parameters in order for them to interact with the plots.  
Name it as KPI

The screenshot shows the Tableau Public interface with the following details:

- Top Bar:** File, Data, Worksheet, Dashboard, Story, Analysis, Map, Format, Window, Help.
- Toolbars:** Standard, Show Me.
- Left Panel:**
  - Data:** Shows a connection to "wine\_Sales - Raw Data".
    - Search bar: "Create Calculated Field..." (highlighted with a red box).
    - Options: Create Parameter..., Group by Folder, Group by Data Source Table (selected), Sort by Name, Sort by Data Source Order, Hide All Unused Fields, Show Hidden Fields, Expand All, Collapse All.
    - Advanced Targets: Unit Price, What if Revenue, Latitude (generated), Longitude (generated), wine\_Sales - Raw Data.c..., Measure Values.
  - Parameters:** [Order / Revenue]\_Para, growth\_rate, KPI.- Middle Panel:**
  - Pages:** Shows "wine\_Sales - Raw Data".
  - Filters:** An empty section.
  - KPI:** An empty section with three "Drop field here" areas.
- Bottom Panel:** This file is meant for personal use by amitjain000@gmail.com only.

# Geographical Overview

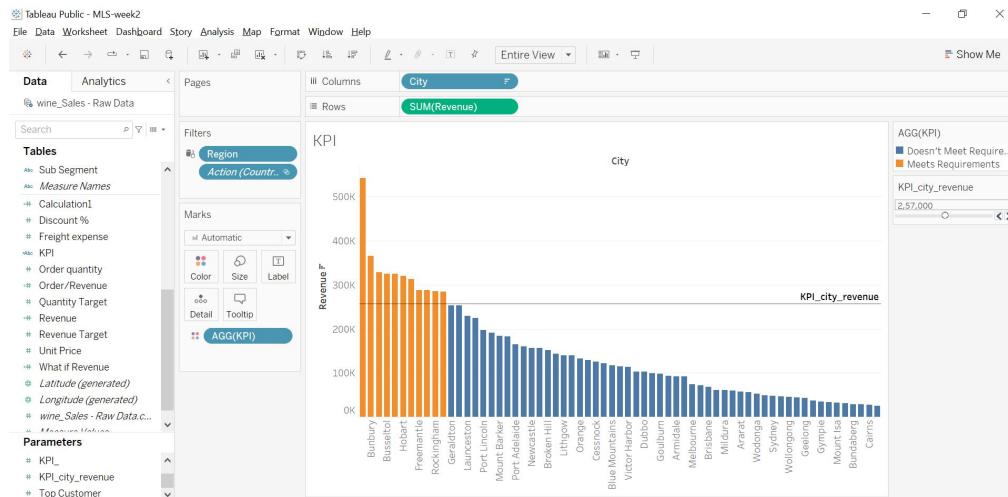
## Step-6:

Use the below formula in the calculated field to create field "KPI"

```
IF SUM([Revenue])>[KPI_] then "Meets Requirements"  
ELSE "Doesn't Meet Requirements"  
END
```

## Step-7:

Drag & Drop the required field to the Rows, columns & Marks as shown below.



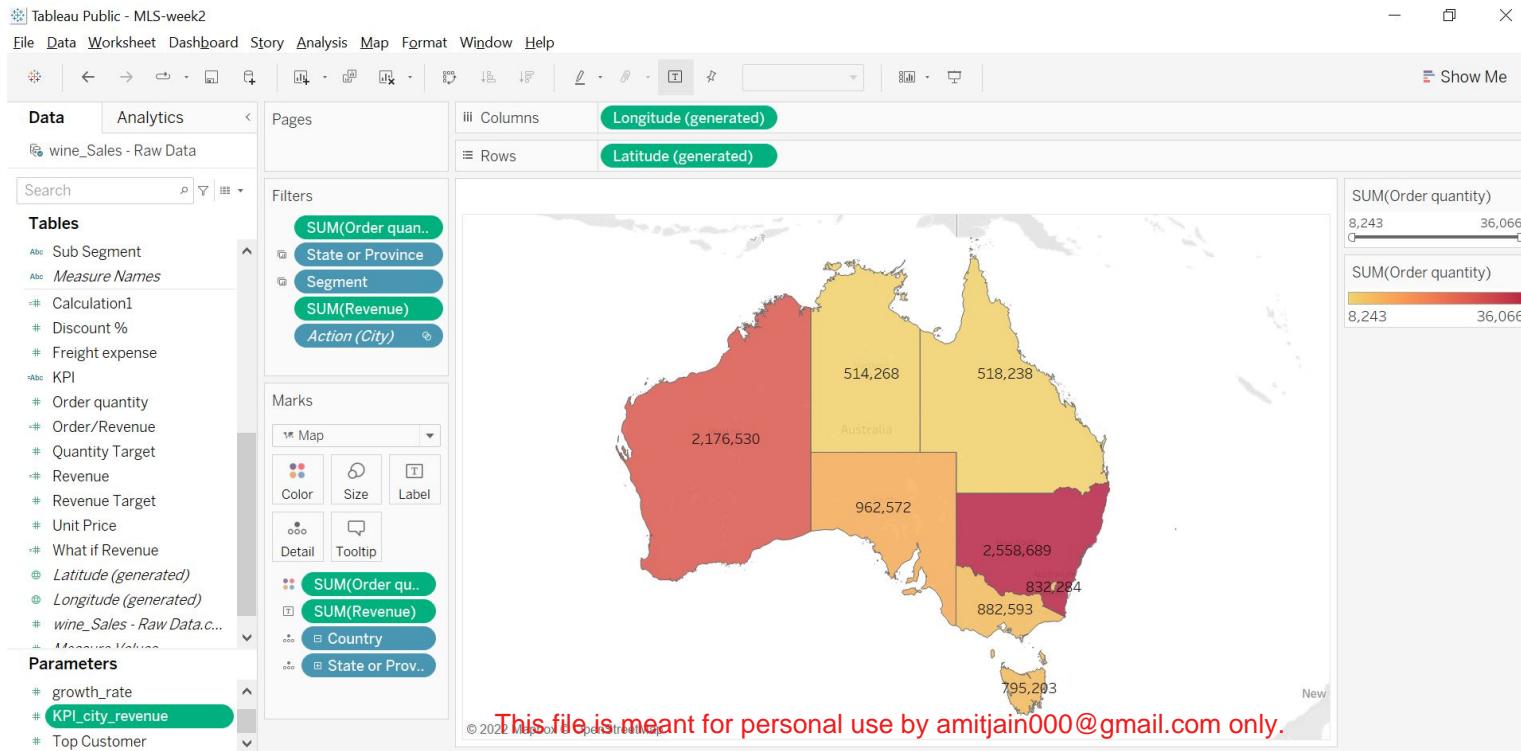
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# Geographical Overview

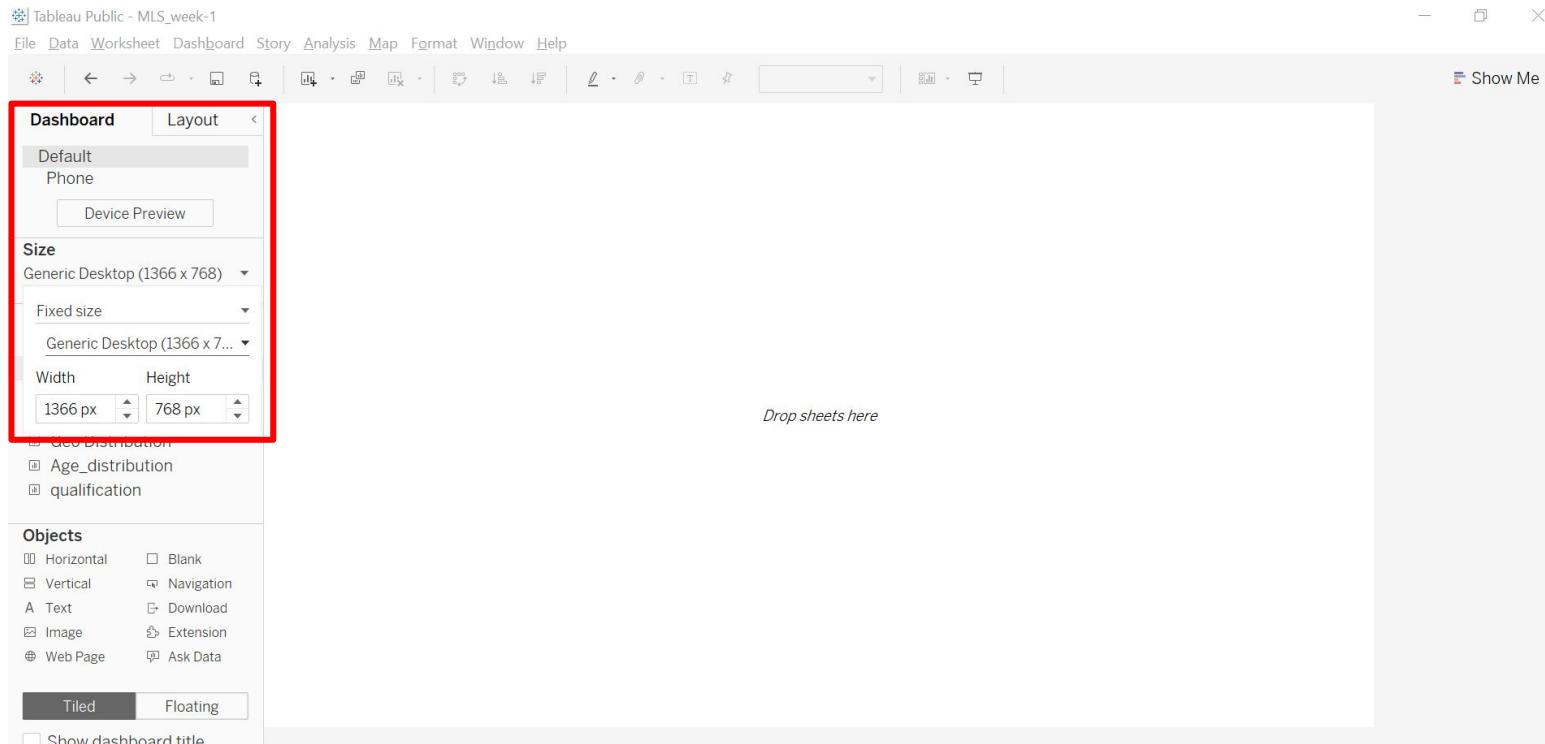
## Sheet-4: Geography

Lets create a map based on geography with the required filters and marks as shown in the image below.



# Geographical Overview

Now all the sheets are made it's time to put them together and make a dashboard and the below image shows the settings needs to be fixed. This Dashboard setting is common for all

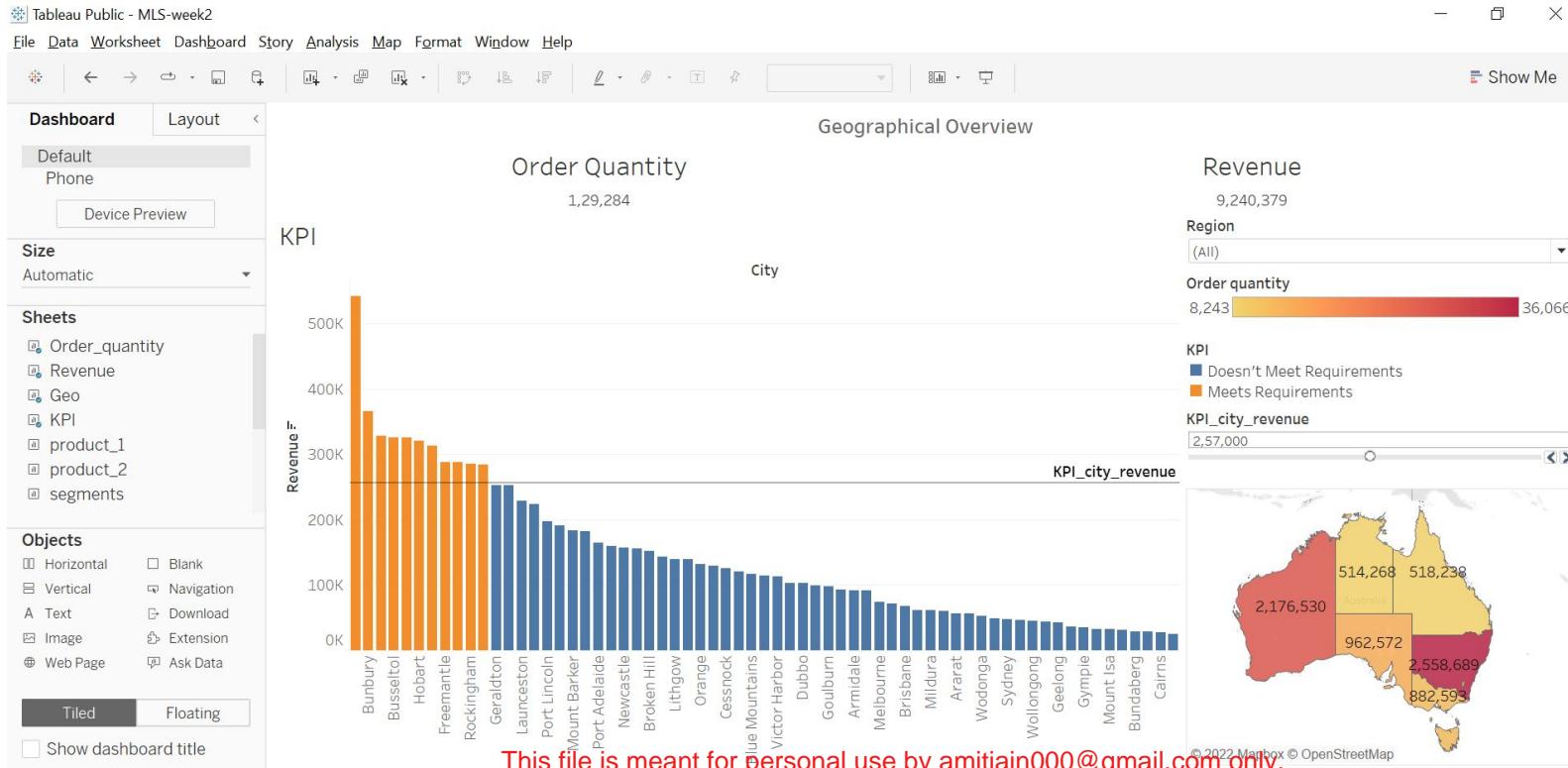


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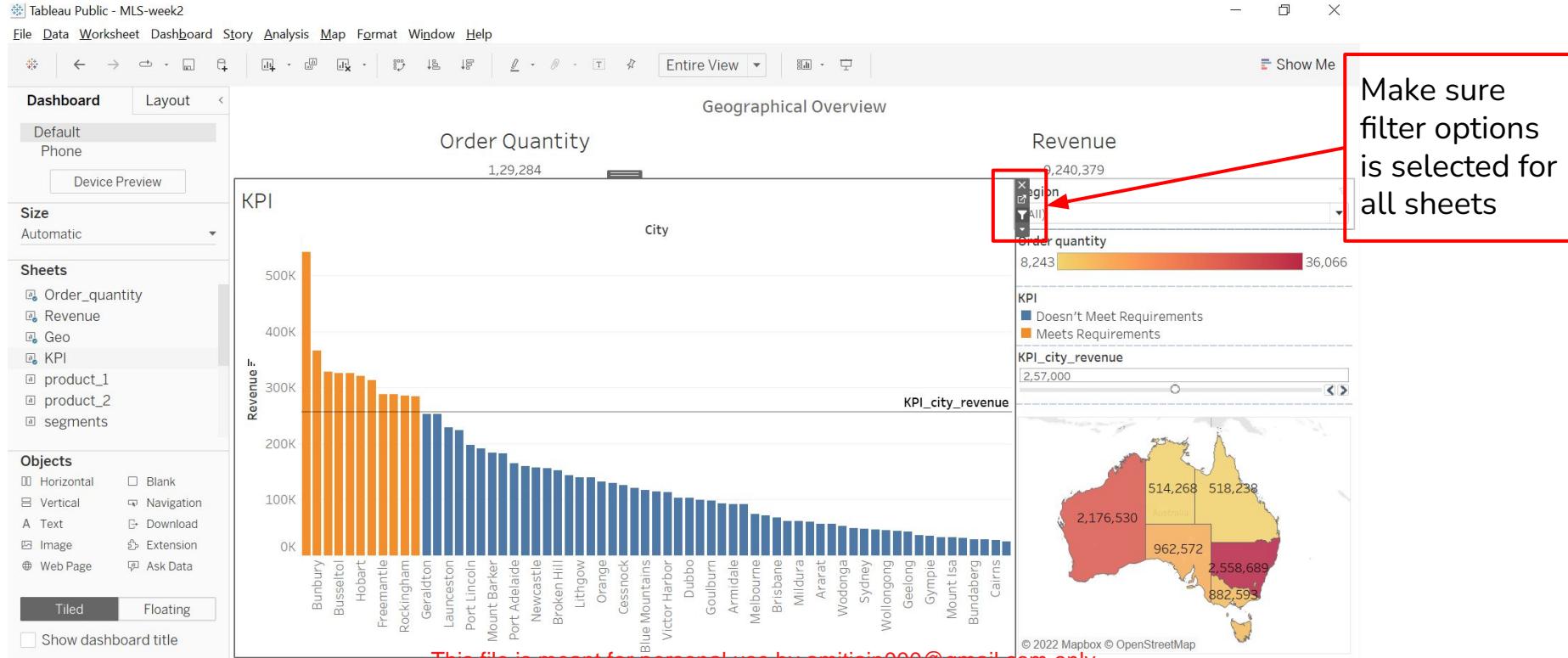
# Geographical Overview

Now that all the sheets needed have been created, it's time to put them into one dashboard with the respective filters selected as shown below.



# Geographical Overview

Make sure that all the Filters option are enabled for all sheets



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# DASHBOARD : 2

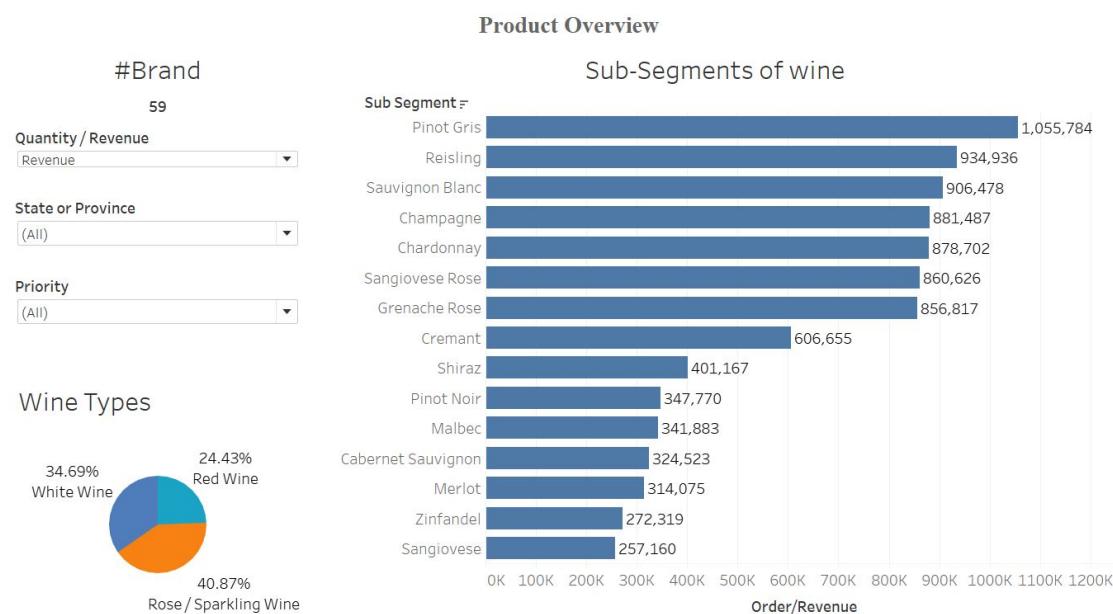
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# Product Overview

The below image is the dashboard of the Product overview. It have three sheets as follows Brand, Sub-segments of wine & wine types as shown below along with various filters



[Click here](#)

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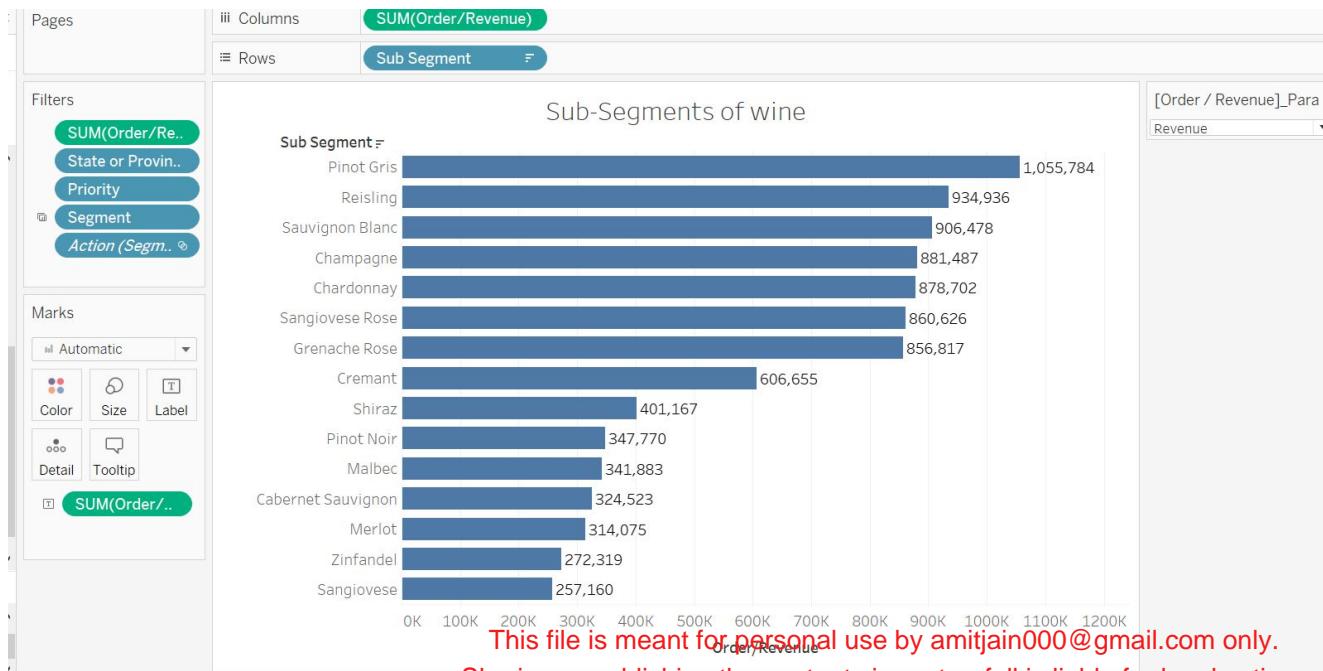
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# Product Overview

## Step-1: Product (Sub-segment of wine)

Below Image is the expected result for the Product Sheet. Make sure all the Filters and Marks are selected as shown in the image below. But in order to create the Order/Revenue its made out of Parameters & calculated field.

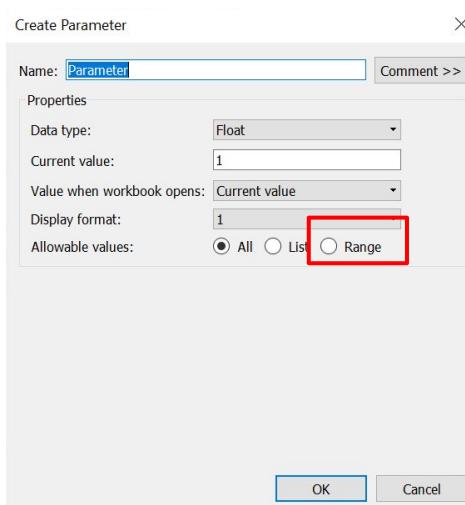


# Product Overview

## Step-2: Product (Sub-segment of wine)

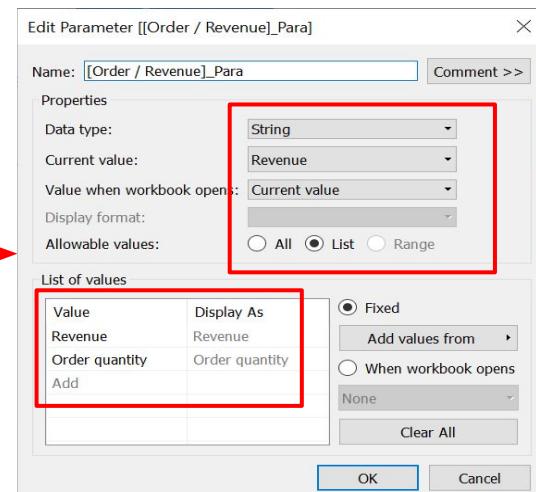
In order to create the Field Orders/Revenue. First create the parameters with information filled as shown below. So that you can find the **[Orders/Revenue]\_Para** in the parameters and make sure the Show parameters options is selected.

Image-1



Make sure all the information are Updated as shown in image-2

Image-2



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# Product Overview

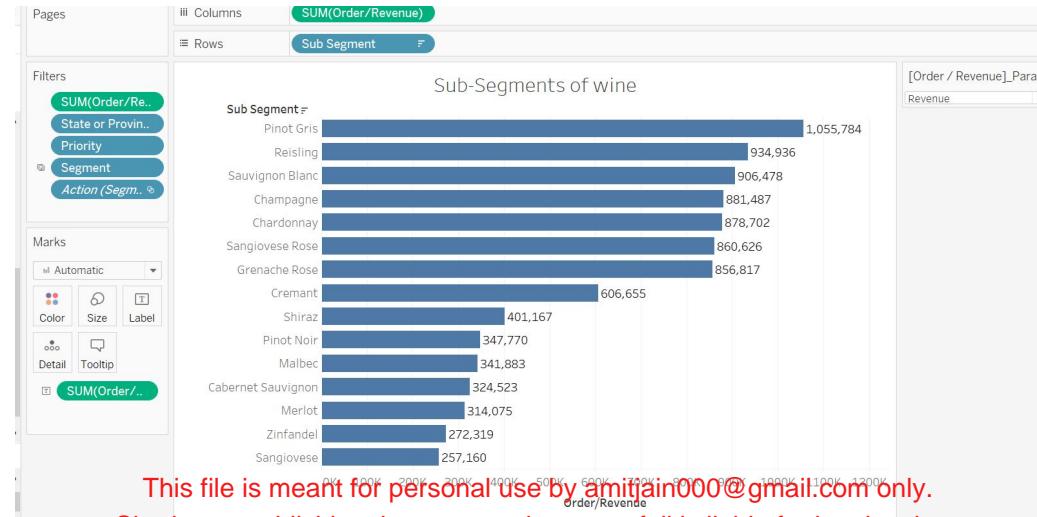
## Step-3:

Use the below formula in the calculated field to create field “Order/Revenue”

```
CASE [[Order / Revenue]]_Para  
WHEN "Order quantity" then [Order quantity]  
WHEN "Revenue" then [Revenue]  
END
```

## Step-4:

Drag & Drop the required field to the Rows, columns & Marks as shown below.

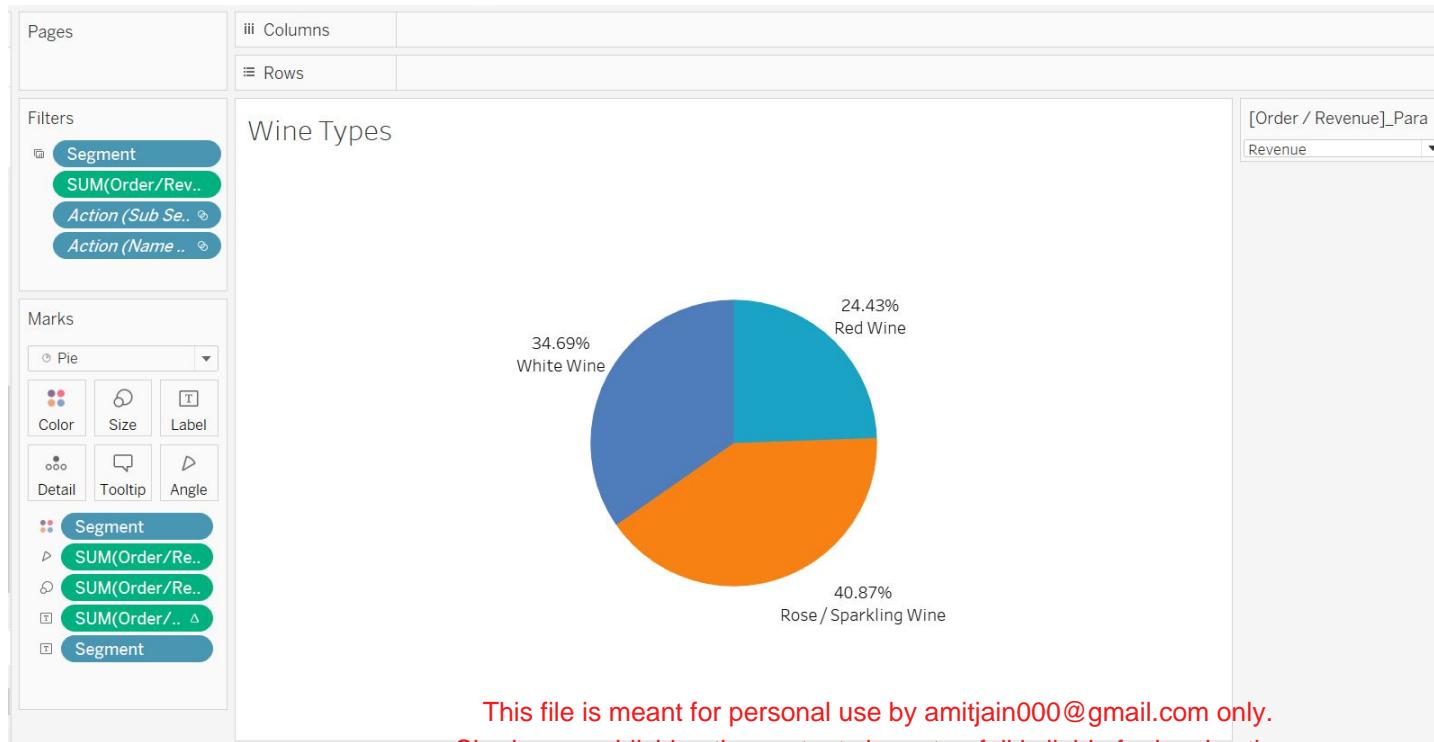


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# Product Overview

Below Image is the expected result for the Segments Sheet. Make sure all the Filters and Marks are selected as shown in the image below.



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# Product Overview

## Step-1: segments

Here, In order to make a pie chart select **Segment & Orders/Revenue** from the tables section on the left and select the pie-chart from the Right.

The screenshot shows the Tableau Public interface with the following details:

- Top Bar:** File, Data, Worksheet, Dashboard, Story, Analysis, Map, Format, Window, Help.
- Data Section:** Shows "wine\_Sales - Raw Data".
- Tables Section:** Lists fields: Name of Item, Order ID, Packaging Type, Priority, Region, Row ID, Segment (highlighted with a red box), Sub Segment, Measure Names, Calculation1, Discount %, Freight expense, KPI, Order quantity, Order/Revenue (highlighted with a green box), Quantity Target, Revenue, and Revenue Target.
- Marks Section:** Automatic, Color, Size, Text, Detail, Tooltip.
- Sheet 14:** A blank sheet with three "Drop field here" placeholder boxes.
- Right Panel:** Shows the "Show Me" feature with various chart types. The pie chart icon is highlighted with a red box.
- Bottom Right:** Text: "For pie charts try 1 or more Dimensions" and "1 or 2 Measures".

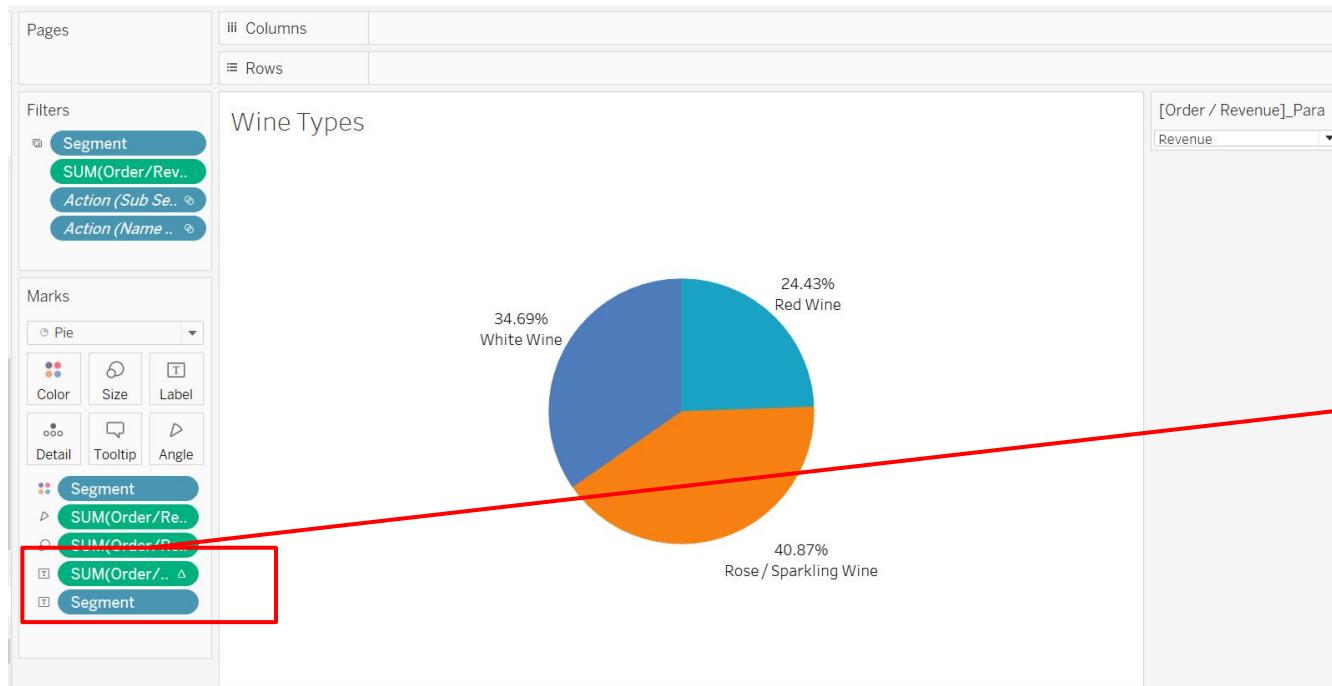
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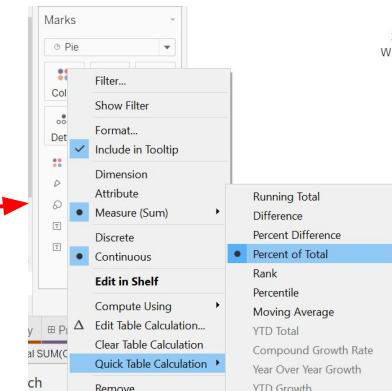
# Product Overview

## Step-2: segments

Then have the necessary fields to the marks in order to have marks as shown in the pie chart below.



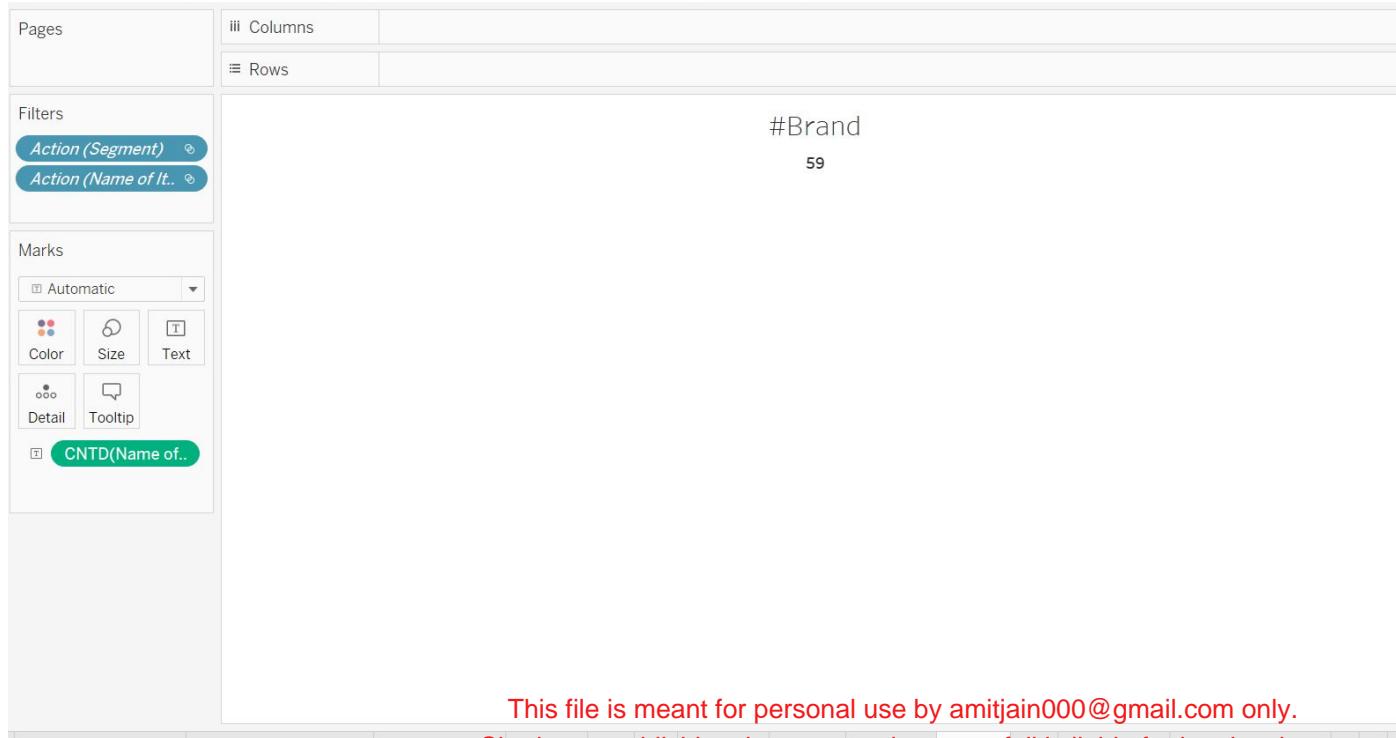
The below options to be selected for the Orders/Revenue marks



# Product Overview

## Sheet-3: #Brand

The below image is the expected sheet result for the brands. Getting the **name of the item** to the marks as shown below and getting the count(Distinct) for the same



# Product Overview

## Sheet-3: #Brand

The below image shows the options to be selected in the marks section. And the alignment for the text's are done

Tableau Public - MLS-week2

File Data Worksheet Dashboard Story Analysis Map Format Window Help

Data Analytics < Pages Columns Rows

wine\_Sales - Raw Data

Search

Tables

- Name of Item
- # Order ID
- Packaging Type
- Priority
- Region
- # Row ID
- Segment
- Sub Segment
- Measure Names
- Calculation1
- Discount %
- Freight expense
- KPI
- Order quantity
- Order/Revenue
- Quantity Target
- Revenue
- Revenue Target

Parameters

- [Order / Revenue]\_Para

Marks

- Automatic
- Color
- Size
- Text
- Det.
- Filter...
- Show Filter
- Apply to Worksheets
- Format...
- Include in Tooltip
- Dimension
- Attribute
- Measure (Count (Distinct))
  - Minimum
  - Maximum
  - Count
  - Count (Distinct)
- Discrete
- Continuous
- Edit in Shelf

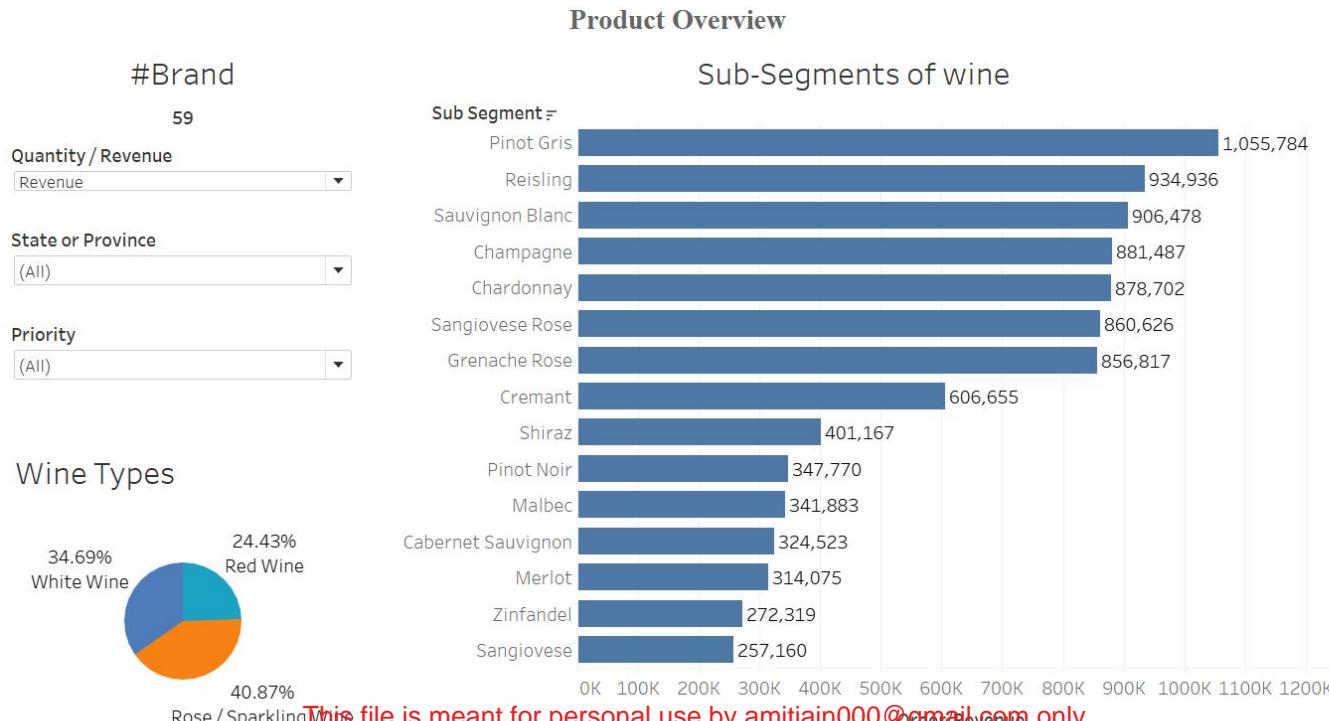
#Brand

59

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# Product Overview

Now that all the sheets needed have been created, it's time to put them into one dashboard with the respective filters selected as shown below. Make sure Filters options are selected for the all the sheets.



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# DASHBOARD : 3

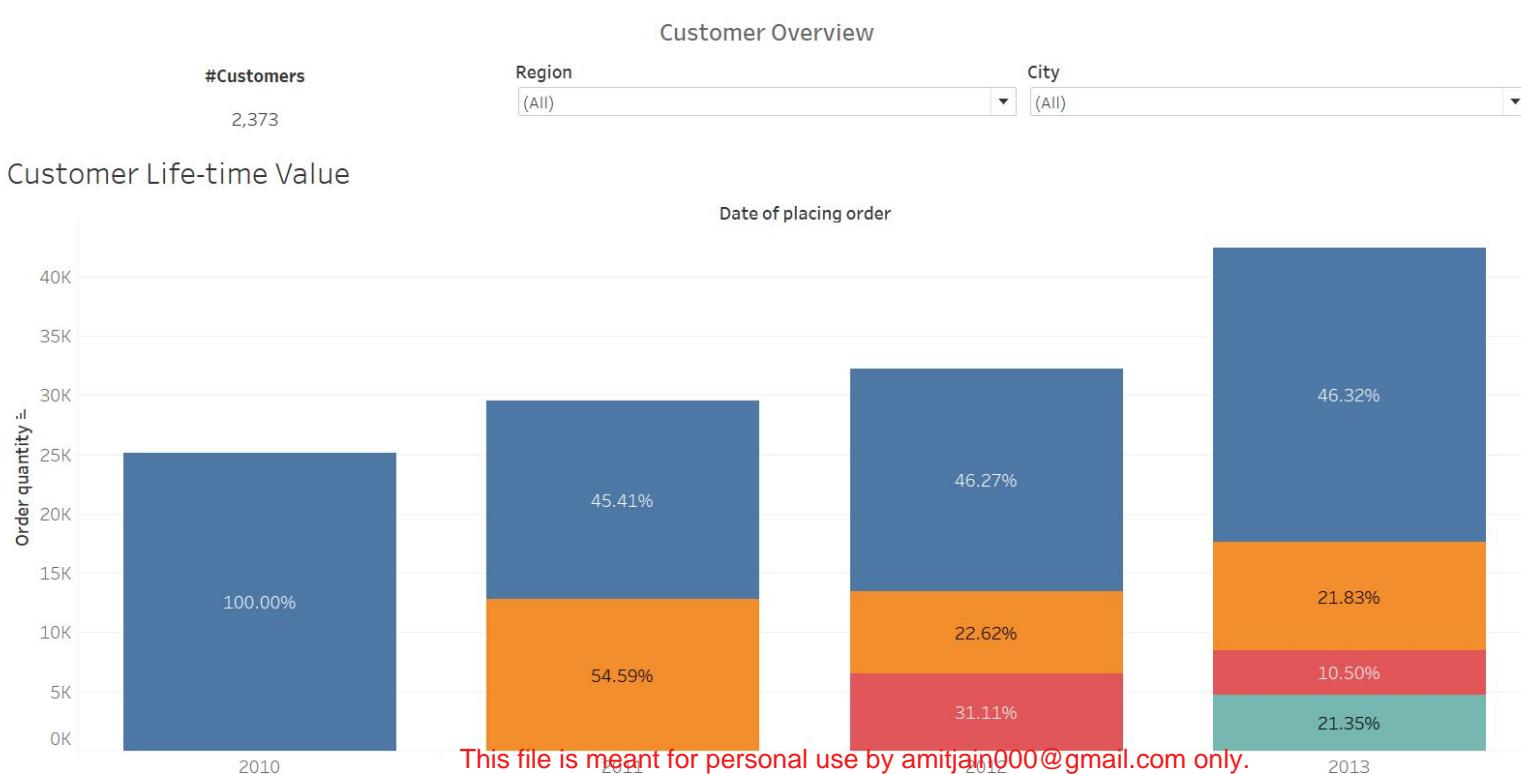
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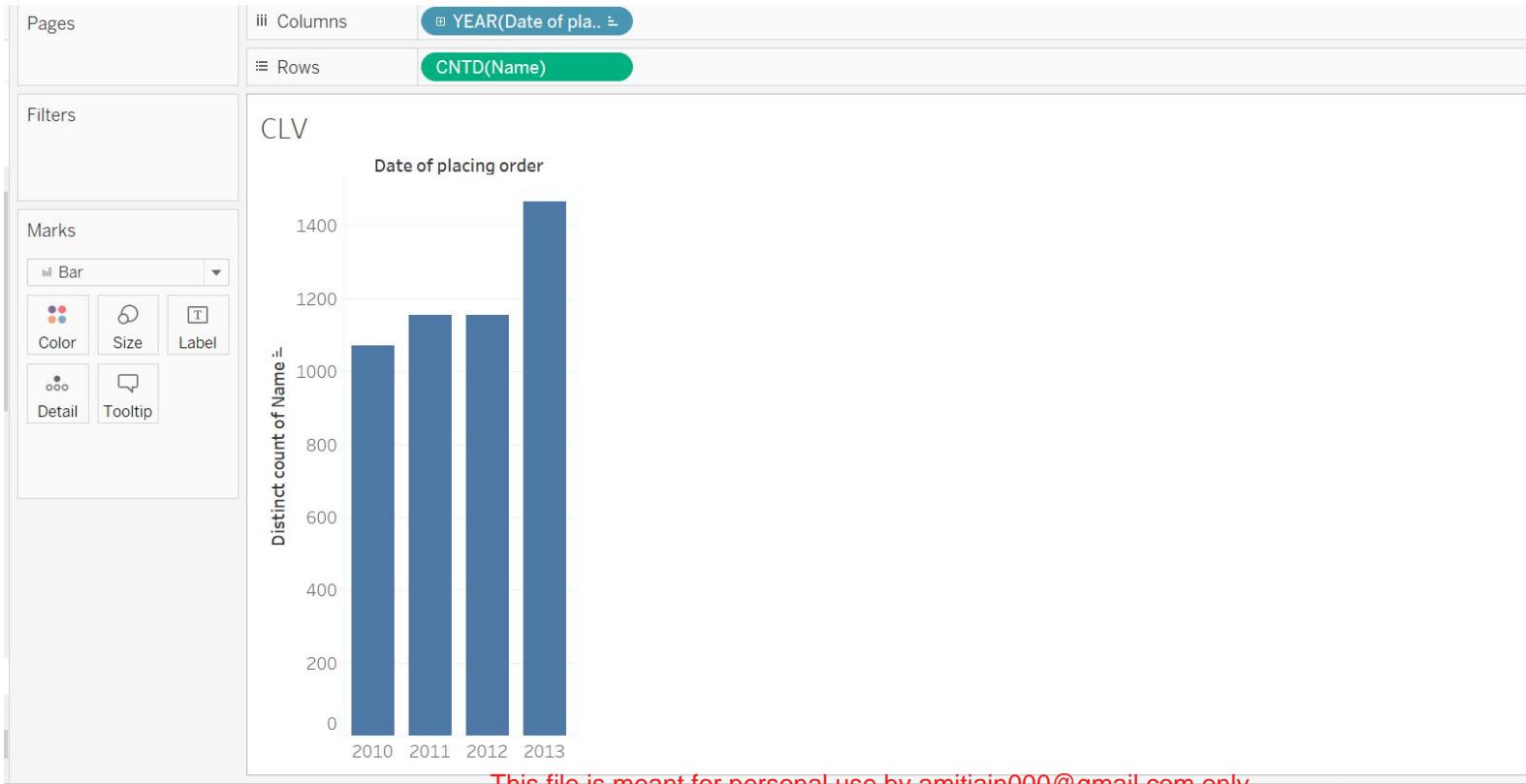
# Customer Overview

Sheet-1 CLV: The below image is the dashboard of the Customer overview. It have two sheets as follows Customers, CLT as shown below along with various filters



# Customer Overview

Step-1: Create the graph as shown below using the required field.



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# Customer Overview

Step-2: In order to create a CLT sheet. It's made by creating a calculated field in order to obtain the customer lifetime value as shown in slide 32. Use the below code in a calculated field name it as “**Fixed Order Date**”

**{FIXED [Name] : MIN([Date of placing order])}**

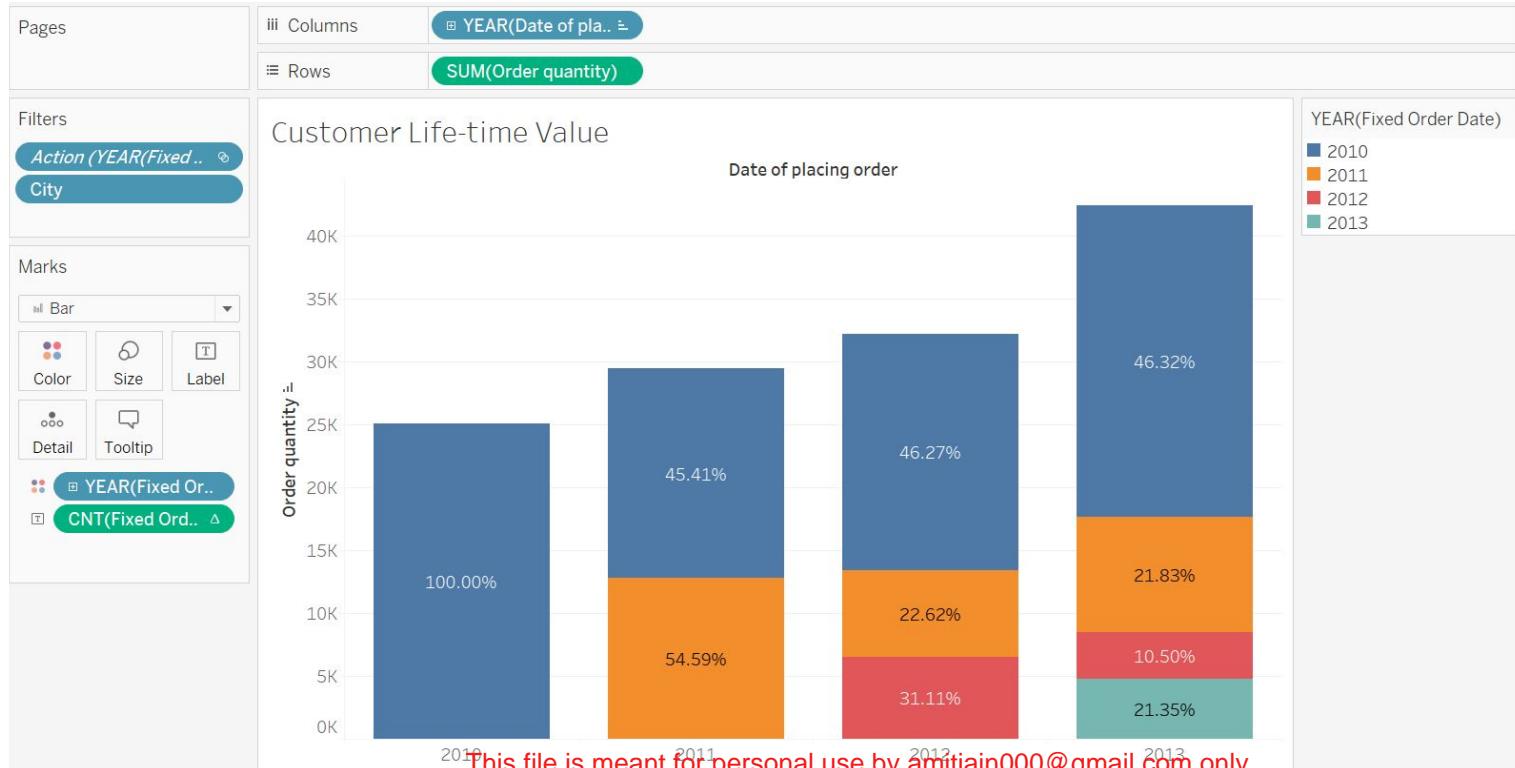
Now drag and drop them in the marks to segregate it according to the years to years cumulative to obtain as shown below



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# Customer Overview

Step-3: Add the respective fields to the marks to obtain the results as shown below. In the text part, select the quick table calculation to obtain the result in percentage.

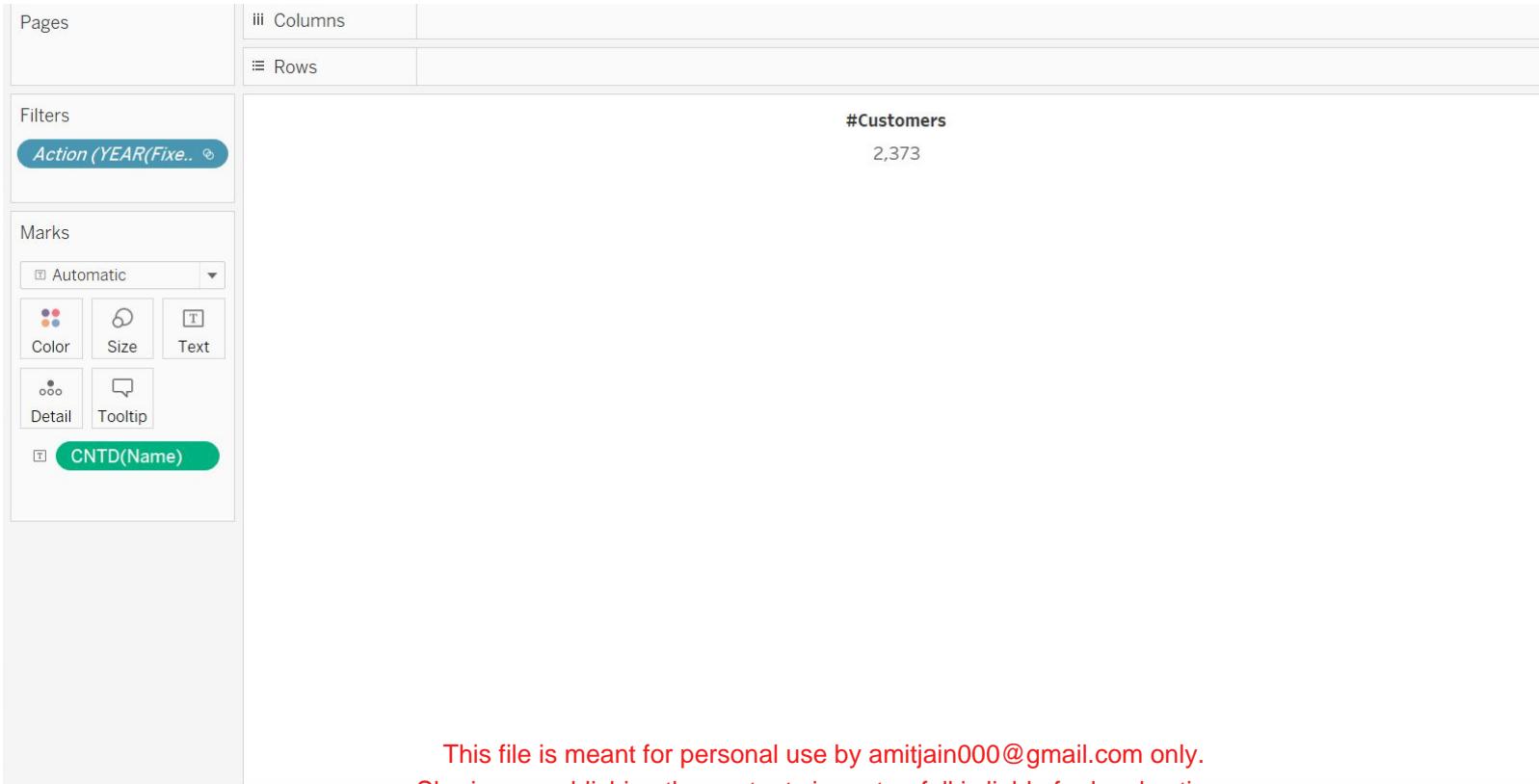


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# Customer Overview

Sheet-2 #Customer: The below sheet shows the distinct count of customer. Add the required Field as shown in below image to get the desired result as shown below.

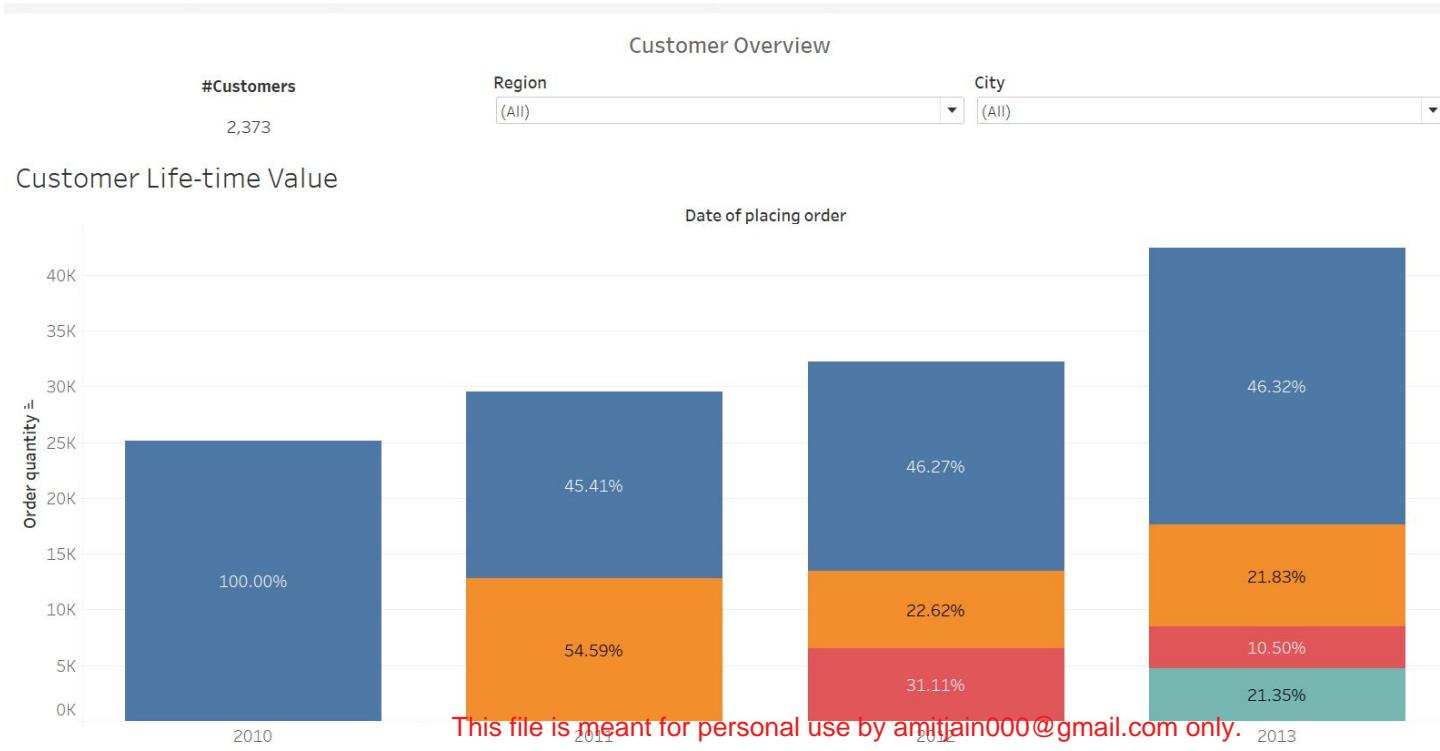


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# Customer Overview

Now that all the sheets needed have been created, it's time to put them into one dashboard with the respective filters selected as shown below. Make sure Filters options are selected for the all the sheets.





# Happy Learning !

