

# **Tableau Desktop 10 - Project**

Solution

### Project 3: Product Analysis

**Step 1:** Create a table with **Category** and **Year of Order Date** in the Rows shelf, and **Month of Order Date** in the Columns shelf. Rename the worksheet as “Product Heat Map.”

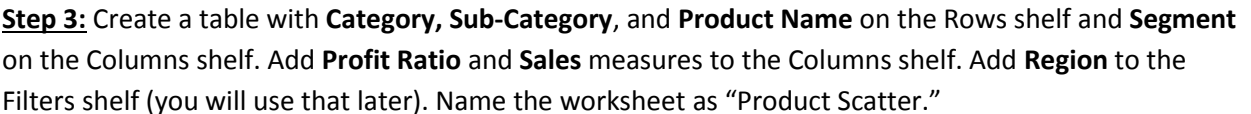
Pages	Columns	MONTH(Order Date)
Filters	Rows	Category, YEAR(Order Date)
Region		
Marks		
Automatic		
Color		
Size		
Text		
Detail		
Tooltip		
SUM(Sales)		

		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Furniture	2012	\$5,952	\$2,130	\$14,574	\$7,945	\$6,913	\$13,206	\$10,821	\$7,320	\$23,816	\$12,304	\$21,565	\$30,646
	2013	\$11,740	\$3,134	\$12,500	\$10,476	\$9,375	\$7,714	\$13,674	\$9,639	\$26,273	\$12,027	\$30,881	\$23,086
	2014	\$7,623	\$3,926	\$12,473	\$13,406	\$15,031	\$12,027	\$13,199	\$13,619	\$26,739	\$10,131	\$33,659	\$37,069
	2015	\$5,964	\$6,866	\$10,597	\$9,053	\$17,267	\$16,903	\$13,882	\$14,909	\$29,598	\$21,884	\$32,927	\$35,537
Office Supplies	2012	\$4,851	\$1,072	\$8,606	\$11,155	\$7,136	\$12,953	\$15,121	\$11,379	\$27,423	\$7,211	\$26,862	\$18,006
	2013	\$1,809	\$5,368	\$15,883	\$12,559	\$9,114	\$10,648	\$4,720	\$11,735	\$19,306	\$8,673	\$21,218	\$16,202
	2014	\$5,300	\$6,683	\$17,458	\$10,640	\$13,007	\$10,902	\$12,677	\$9,219	\$23,286	\$14,799	\$21,428	\$38,112
	2015	\$21,704	\$7,390	\$14,317	\$14,922	\$14,138	\$15,297	\$10,699	\$29,973	\$32,759	\$23,403	\$30,070	\$31,855
Technology	2012	\$3,143	\$1,609	\$32,511	\$9,195	\$9,600	\$8,436	\$8,004	\$9,210	\$30,538	\$11,938	\$30,201	\$20,893
	2013	\$4,625	\$3,449	\$10,344	\$11,161	\$11,643	\$6,435	\$10,371	\$15,525	\$19,017	\$10,705	\$23,874	\$35,632
	2014	\$5,620	\$12,259	\$21,255	\$15,203	\$28,653	\$16,502	\$12,564	\$10,427	\$22,883	\$31,533	\$27,105	\$22,057
	2015	\$17,035	\$6,027	\$28,994	\$16,138	\$14,247	\$16,060	\$23,848	\$16,634	\$28,132	\$32,507	\$49,330	\$23,083

**Step 2:** Use the “Show Me” feature to change the table into a Heat Map, and change the color coding to “Red–Green Diverging.”

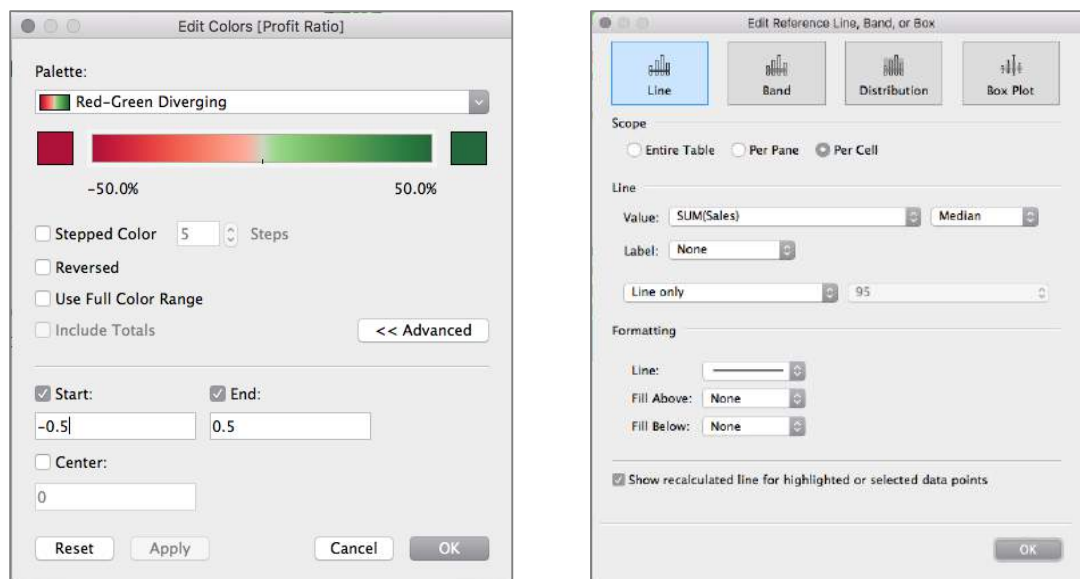
Pages	Columns	MONTH(Order Date)
Filters	Rows	Category, YEAR(Order Date)
Region		
Marks		
Square		
Color		
Size		
Text		
Detail		
Tooltip		
SUM(Sales)		
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		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
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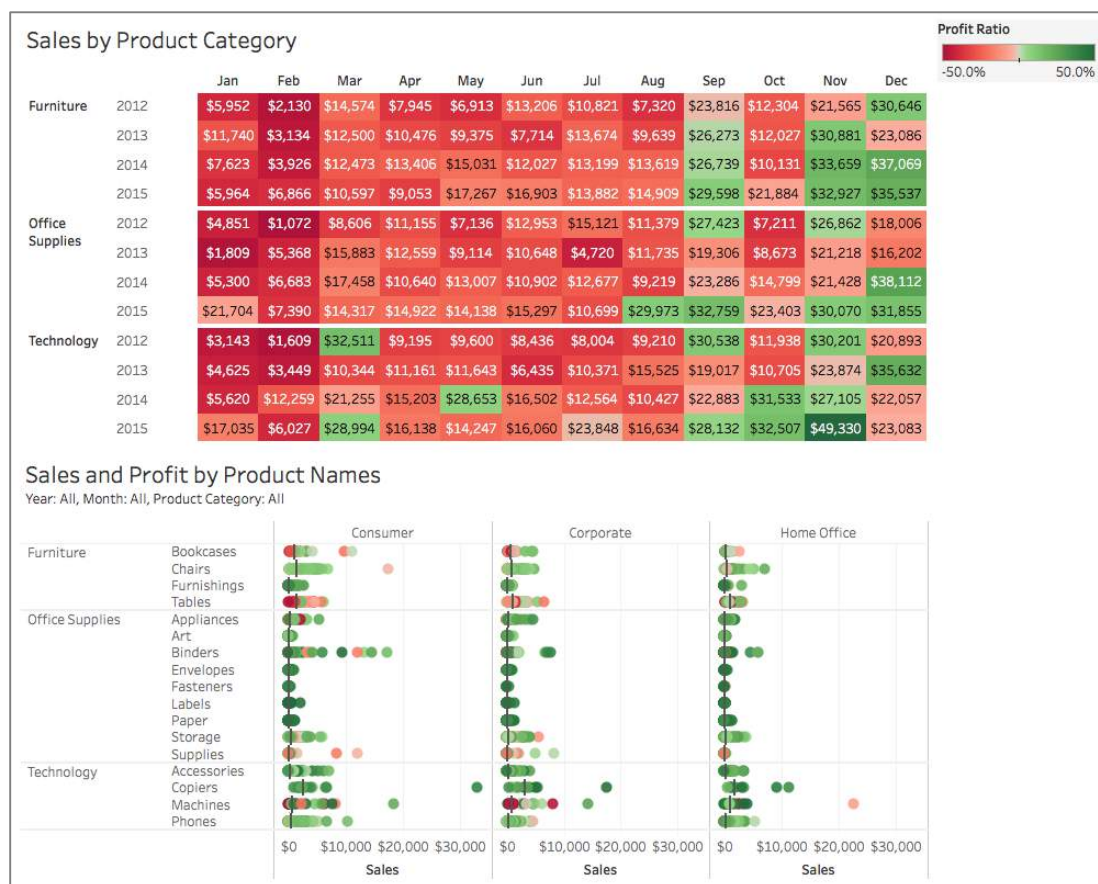


Pages	Columns	Segment										Measure Names																																		
	Rows	Category		Sub-Category		Product Name																																								
Filters																																														
YEAR(Order Date)																																														
MONTH(Order Date)																																														
Region																																														
Measure Names																																														
Marks																																														
Automatic																																														
Color																																														
Size																																														
Tooltip																																														
Measure Values																																														
SUM(Profit)																																														
Measure Values																																														
ADD(Profit Ratio)																																														
SUM(Sales)																																														
						Consumer						Corporate						Home Office																												
						Profit Ratio						Sales						Profit Ratio																												

The dashboard displays three dot plots of Sales by Product Category for Consumer, Corporate, and Home Office segments. The Y-axis lists Product Categories: Furniture (Bookcases, Chairs, Furnishings, Tables), Office Supplies (Appliances, Art, Binders, Envelopes, Fasteners, Labels, Paper, Storage, Supplies), and Technology (Accessories, Coolers, Machines, Phones). The X-axis represents Sales, ranging from \$0 to \$30,000. A legend on the right indicates the AGG(Profit Ratio) scale from -50.0% (red) to 50.0% (green). The filter pane on the left shows the Region filter set to 'Region'.



**Step 5:** Create a Dashboard and name it “Product Analysis.” Add the heat map view to the top of the Dashboard and add the scatter graph to the bottom.

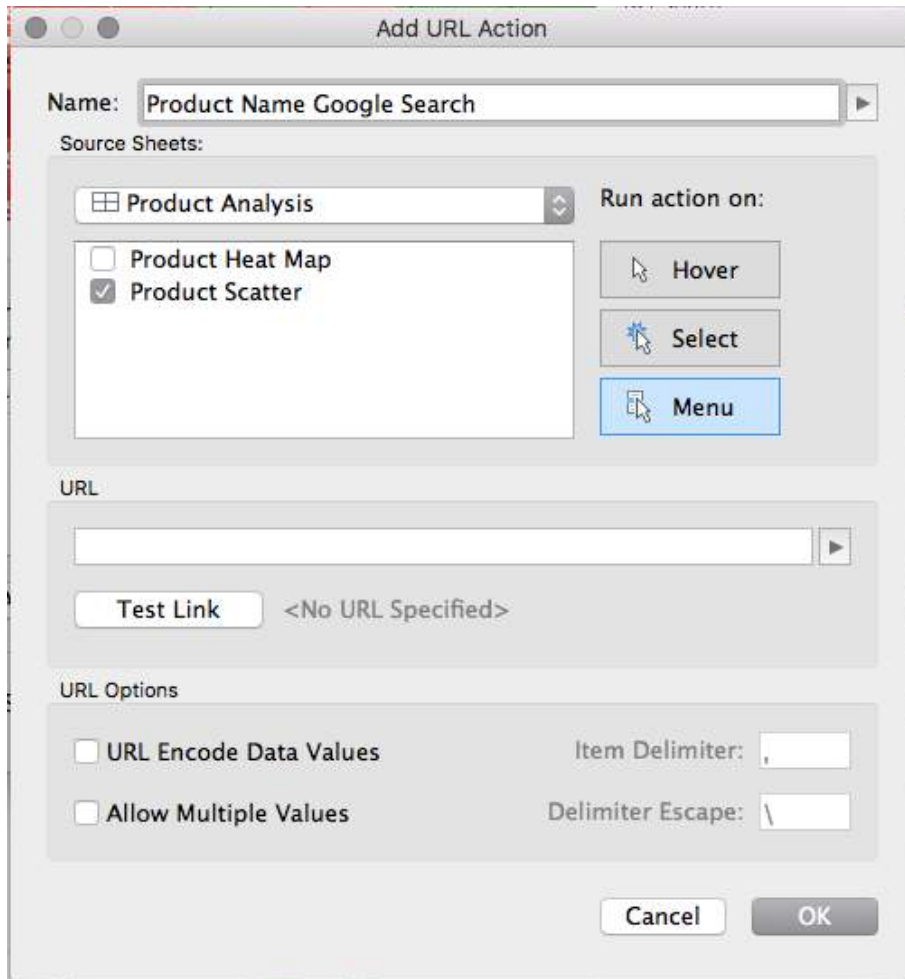


**Step 6:** Add a filter for Region to the Dashboard and set the Filter to apply to all views within the Dashboard:

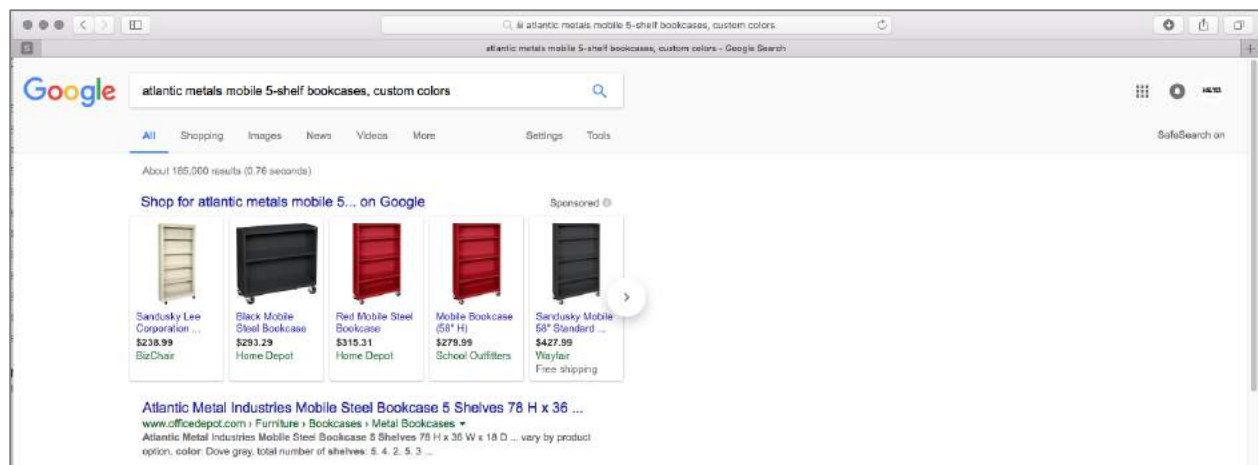




**Step 7:** Create a URL Action that applies to the Product Scatter view. Name the action “Product Name Google Search.”



**Step 8:** Go to google.com and search for a product manually:



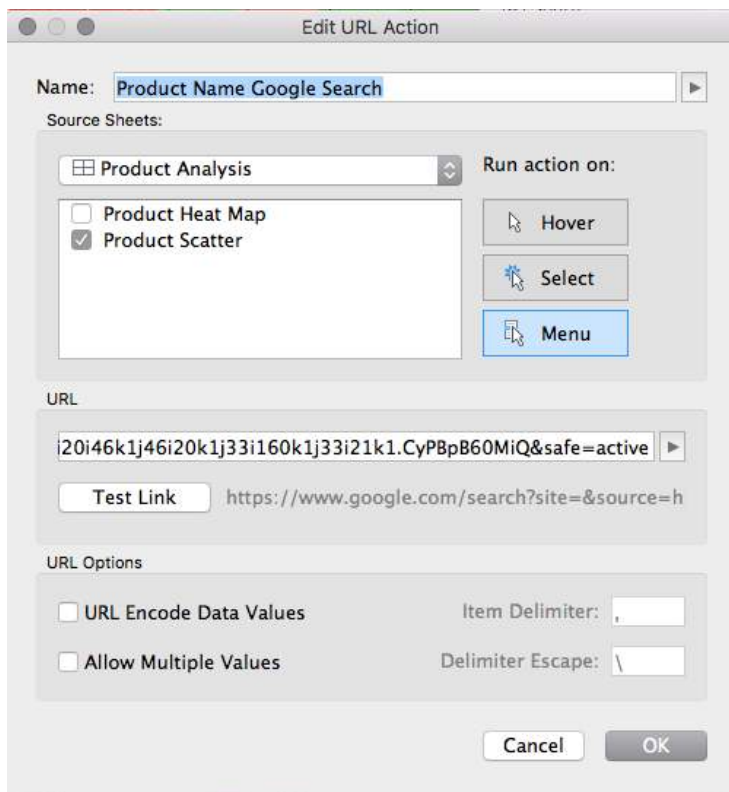
**Step 9:** Copy-paste the URL into a text editor. Note the search terms within the URL:

```
//www.google.com/search?site=&source=hp&q=Atlantic+Metals+Mobile+5-
Shelf+Bookcases%2C+Custom+Colors&oq=Atlantic+Metals+Mobile+5-
Shelf+Bookcases%2C+Custom+Colors&gs_l=hp.3...3296.15952.0.16749.59.51.1.1.1.0.1606.7896.5j15
j8j2j0j2j8-
1.33.0....0...1c.1.64.hp..25.28.4923.0..0j35i39k1j0i131k1j0i20k1j0i20i46k1j46i20k1j33i160k1j33i21k1
.CyPBpB60MiQ&safe=active
```

**Step 10:** Copy-paste the URL into a text editor. Note the search terms within the URL:

```
//www.google.com/search?site=&source=hp&q=<Product
Name>&gs_l=hp.3...3296.15952.0.16749.59.51.1.1.1.0.1606.7896.5j15j8j2j0j2j8-
1.33.0....0...1c.1.64.hp..25.28.4923.0..0j35i39k1j0i131k1j0i20k1j0i20i46k1j46i20k1j33i160k1j33i21k1
.CyPBpB60MiQ&safe=active
```

**Step 11:** Copy-paste the URL with the Product Name field into the “Add URL Action” box in Tableau. Click “Test Link” to ensure the link works properly:



**Step 12:** Set the Action to work when the user selects a Product Name from the view:

**Edit URL Action**

Name:

Source Sheets:

☒ Product Analysis

Run action on:

☐ Hover

☒ Select

☐ Menu

URL

<https://www.google.com/search?site=&source=h>

URL Options

☐ URL Encode Data Values

☐ Allow Multiple Values

Item Delimiter:

Delimiter Escape:

**Step 13:** Save your workbook as “Product Analysis.”