Lesson 2 - Exercise 2.1: Getting Started with Tableau

Business Scenario

Ray Hann, the sales supervisor of a retail industry, is expected to present a report to the senior sales managers for analyzing sales achieved by categories and segments on a yearly basis. He needs to develop a view for showcasing sales over categories and segments across all the years. Using the view, answer the following questions:
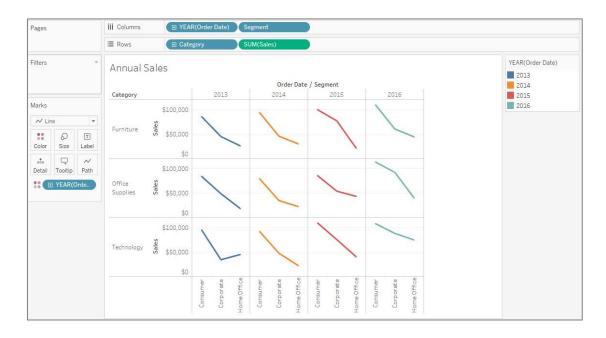
- Which segment has the highest sales across all years?

- For which Year and Category was the Home Office sales greater than the Corporate sales?

Overview:

- Plot Sales against Category, Segment, and Order Date.
- Change mark type to line.
- Use color encoding at Yearly level.

Note: Use the Sample-Superstore saved data source.

The result should resemble the image given below:

Detailed Instructions

1. Open **Tableau 10.x** (You can go to Start Menu -> All Programs -> Tableau 10.x).
2. On the home page, under **Connect,** under **Saved Data Sources,** select **Sample – Superstore.**
3. In the Data pane, under Dimensions, locate **Category** and place it in the Rows shelf.
4. In the Data pane, under Dimensions, locate **Order Date** and **Segment** and place them in the Columns shelf.
5. In the Data pane, under Measures, locate **Sales** and place it in the Rows shelf.
6. To change mark type, click on the drop down in the marks card and select **Line**.
7. Drag and drop the **Order Date** in the Color shelf in the Marks card.

The result should resemble the image below.

8. Rename the sheet as **Annual Sales.**

Answers

Based on the view, these are the answers to the questions in the problem statement:

- Which segment has the highest sales across all years?

  Answer – **Consumer**

- For which Year and Category was the Home Office sales greater than Corporate sales?

  Answer - **2013, Technology**