

Lesson 12 – Exercise 12.1: Building a dashboard and dashboard actions

Business Scenario

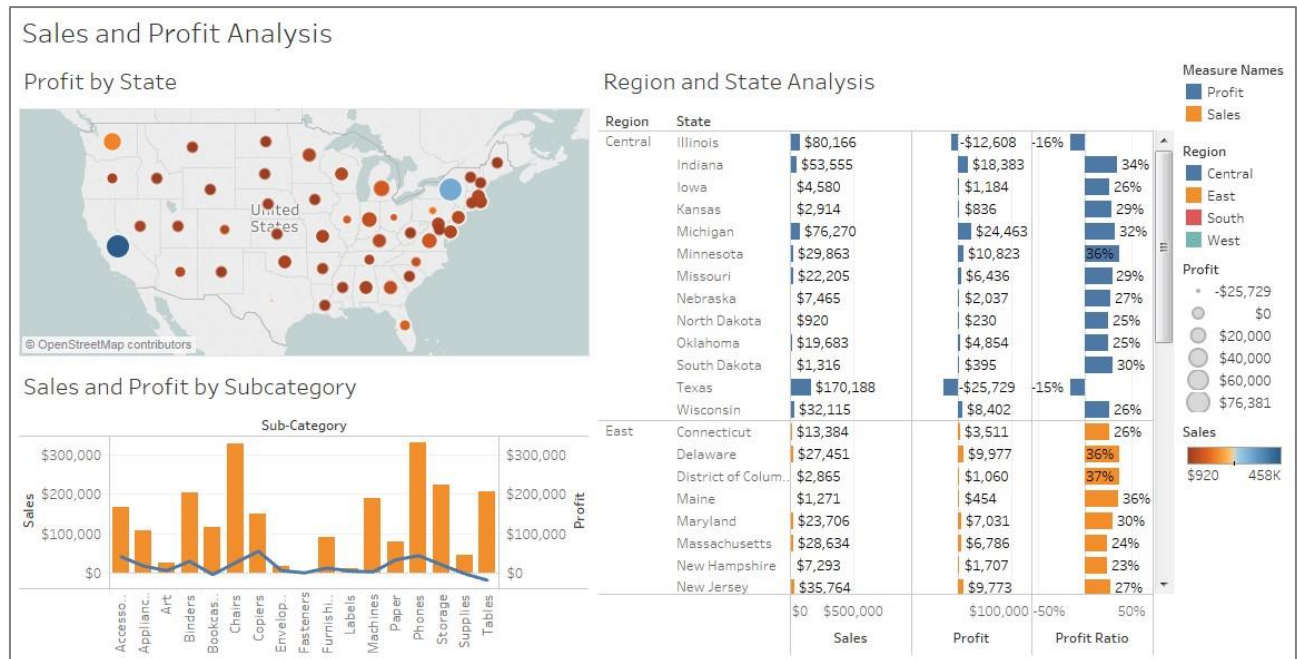
A retail company is strategizing to improve business in low performing areas as well as to extend its services in areas that contribute the maximum toward sales and profit. For this, John Douglas, CEO of the company, needs to keep an eye on region, state, category, subcategory, sales, profit ratio, and profit. This will help him determine the regions and states eligible for attractive discount strategies. Answer the following questions.

- What is the overall profit of the Central region?
(**Hint:** Add Subtotal)
- In the South Region, which subcategory recorded the lowest sales?
(**Hint-**Select the South Region in the Region and State Analysis sheet.)

Overview

- Design the required sheets.
- Create a dashboard using these sheets in the workbook.
- Add a Filter action on the Region and State Analysis sheet.

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. Connect to the saved **Sample - Superstore** data source.
3. To create a view, drag **Region** and **State** dimensions to Rows, and **Sales**, **Profit**, and **Profit Ratio** measures to Columns.
4. **Color** all the measures by **Region**.
5. Enable **labels** using **Marks Card**.
6. Rename the sheet as **Region and State analysis**.
7. To create a view, navigate to a new sheet.
8. Create a symbol map with the **State** dimension.
9. Drag the **Sales** measure to **Color**.
10. Drag the **Profit** measure to **Size**.
11. To change the color, click **Color > Edit Colors**.
12. From the **Edit Colors** palette, select **Orange-Blue Diverging**.
13. Click **OK**.
14. Rename sheet as **Profit by State**.
15. Create a new sheet.
16. Create a dual axis combination chart with **Sub-Category**, **Sales**, and **Profit**.
17. Drag the **Sub-Category** dimension to Columns.
18. Drag the **Sales** and **Profit** measures to Rows.
19. Right Click on SUM (Profit) pill and check **Dual Axis**.
20. To synchronize the axis scale, right click the **Profit** axis and select **Synchronize Axis**.

21. To change the mark type, select the **Sales** axis; from the **Marks Card**, select **Bar**.
22. Repeat the above process for **Profit** and select **Line**.
23. In the All marks, drag **Category** to **Tooltip**.
24. Rename the sheet as **Sales and Profit by Subcategory**.
25. Create a New Dashboard.
26. Set the Size of the dashboard to **Automatic**.
27. To enable the dashboard title, click **Show dashboard title**.
28. Drag the sheets to the dashboard area.
29. Resize the sheets.
30. To add a filter action, click **Dashboard > Actions**.
31. In the Actions window, select **Add Action > Filter**.
32. In Add Filter Action, name this action as **Select to Filter**.
33. Below Source Sheets, set source as **Region and State analysis**.
34. To trigger this action, choose run action on **Select**.
35. Below Target Sheets, un-check **Region and State analysis**.
36. Click **OK**.
37. Select any state on the **Region and State analysis** sheet to run the filter action 38.
Save this workbook as **Lesson 12 - Exercise**.

Answers

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

- What is the overall profit of the Central region?
Answer – **\$39,706**
- In the South Region, which subcategory recorded the lowest sales?
Answer – **Fasteners**