

# **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.”

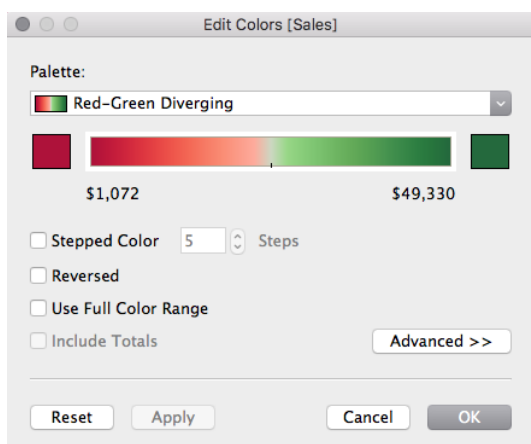
Pages	Columns	MONTH(Order Date)
Filters	Rows	Category YEAR(Order Date)
Region		
Marks		
Automatic		
Color		
Size		
Text		
Detail		
Tooltip		
SUM(Sales)		

		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.”

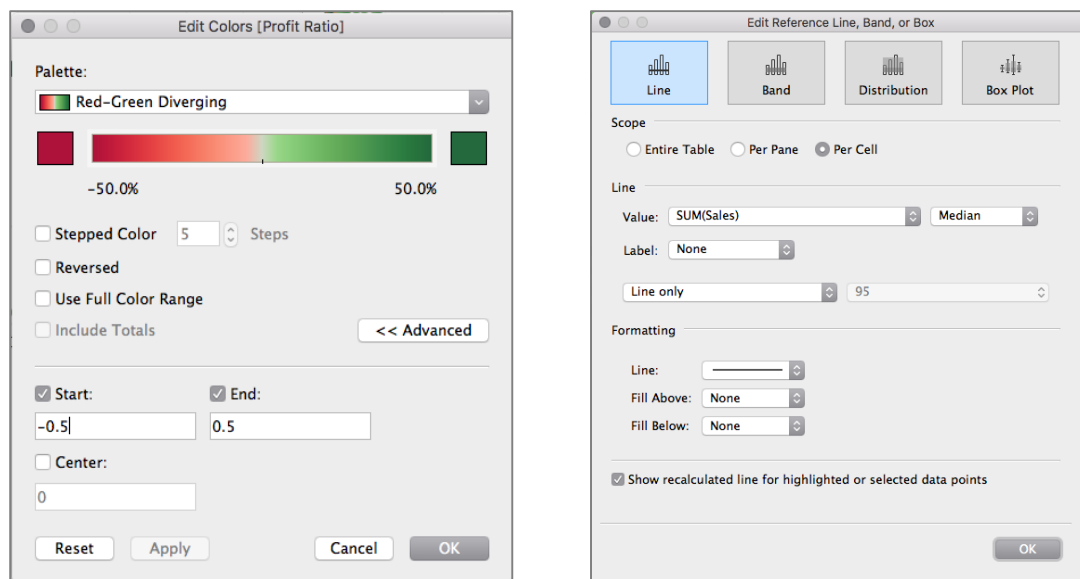
Pages	Columns	MONTH(Order Date)
Filters	Rows	Category YEAR(Order Date)
Region		
Marks		
Square		
Color		
Size		
Text		
Label		
Detail		
Tooltip		
SUM(Sales)		
SUM(Sales)		

		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
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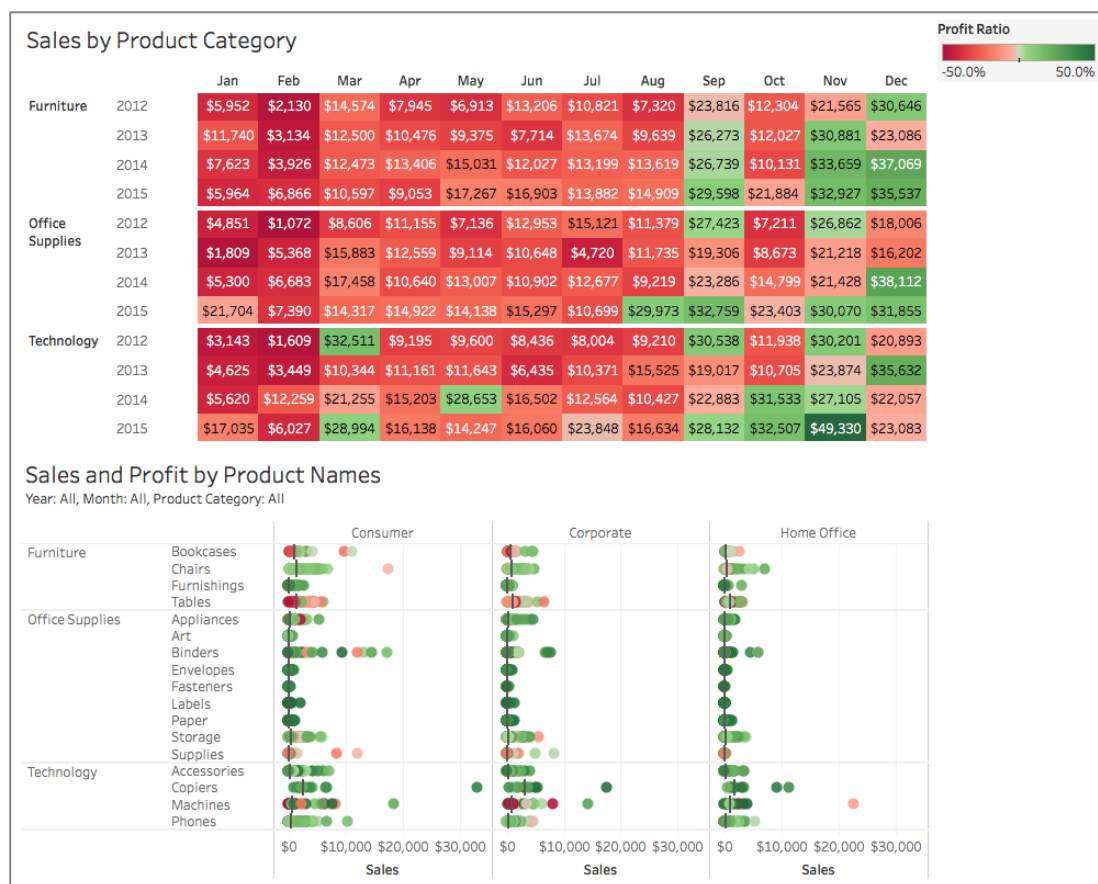


**Step 3:** Create a table with **Category**, **Sub-Category**, and **Product Name** on the Rows shelf and **Segment** on the Columns shelf. Add **Profit Ratio** and **Sales** measures to the Columns shelf. Add **Region** to the Filters shelf (you will use that later). Name the worksheet as “Product Scatter.”

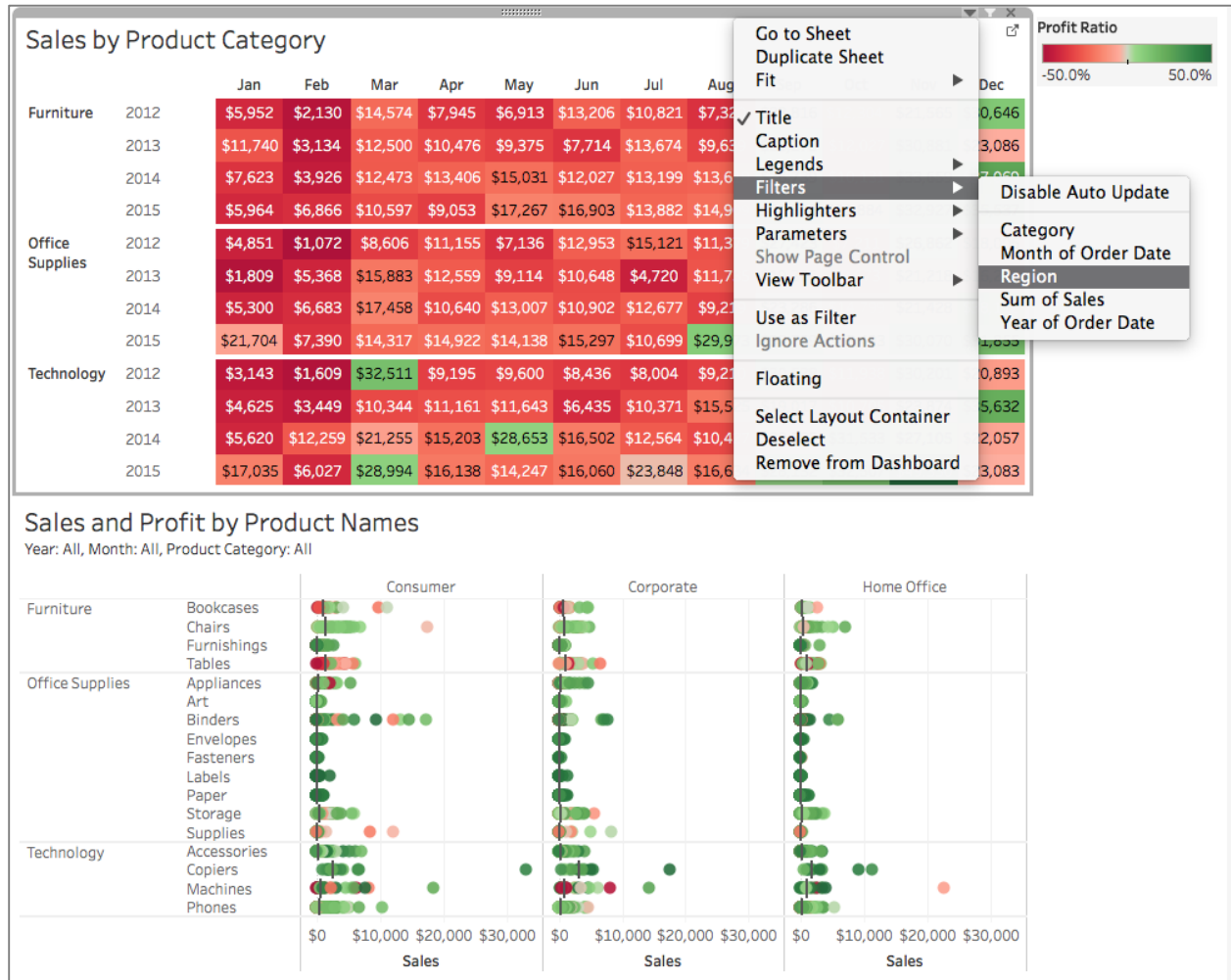
Pages		Columns		Segment		Measure Names					
		Rows		Category		Sub-Category		Product Name			
Filters											
ID	YEAR(Order Date)										
	MONTH(Order Date)										
	Region										
	Measure Names										
Marks											
T Automatic											
Color											
Size											
Text											
Detail											
Tooltip											
Measure Values											
SUM(Profit)											
Measure Values											
AGG(Profit Ratio)											
SUM(Sales)											
				Consumer		Corporate		Home Office			
				Profit Ratio		Sales		Profit Ratio		Sales	
Furniture	Bookcases	Atlantic Metals Mobile 2-...		-28.3%		\$400					
		Atlantic Metals Mobile 3-...		8.9%		\$1,696		13.4%	\$4,685	0.0%	\$1,151
		Atlantic Metals Mobile 4-...		-70.3%		\$1,040		15.2%	\$3,245	12.5%	\$899
		Atlantic Metals Mobile 5-...		1.2%		\$4,265		-2.9%	\$1,228		
		Bestar Classic Bookcase		-22.0%		\$1,195		-49.8%	\$703		
		Bush Andora Bookcase, M...		-0.5%		\$1,770		6.7%	\$1,104	15.7%	\$444
		Bush Birmingham Collecti...						-14.3%	\$825		
		Bush Cubix Collection Boo...		-156.7%		\$66		23.0%	\$663		
		Bush Heritage Pine Collec...		-4.3%		\$973				-6.3%	\$2,655
		Bush Mission Pointe Libra...		0.0%		\$242		-17.6%	\$205	20.0%	\$300
		Bush Saratoga Collection ...		-10.6%		\$120					
		Bush Somerset Collection ...		-4.5%		\$1,264					
		Bush Westfield Collection ...		-23.4%		\$475				8.0%	\$177
		Bush Westfield Collection ...		10.2%		\$1,126		-210.0%	\$91		
		Bush Westfield Collection ...		6.2%		\$772		-11.9%	\$347		
		Bush Westfield Collection ...		0.8%		\$11,047		-3.5%	\$568	-56.0%	\$80
		DMI Eclipse Executive Sul...		6.0%		\$2,155		6.0%	\$1,293		
		Global Adaptabilities Book...		10.3%		\$929		-52.8%	\$545		
		Hon 4-Shelf Metal Bookca...		-5.9%		\$1,357		25.0%	\$213		
		Hon Metal Bookcases, Bla...		27.0%		\$639				27.0%	\$21



**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.”

**Add URL Action**

Name:

Source Sheets:

☐ Product Analysis

☒ Product Heat Map

☒ Product Scatter

Run action on:

URL

<No URL Specified>

URL Options

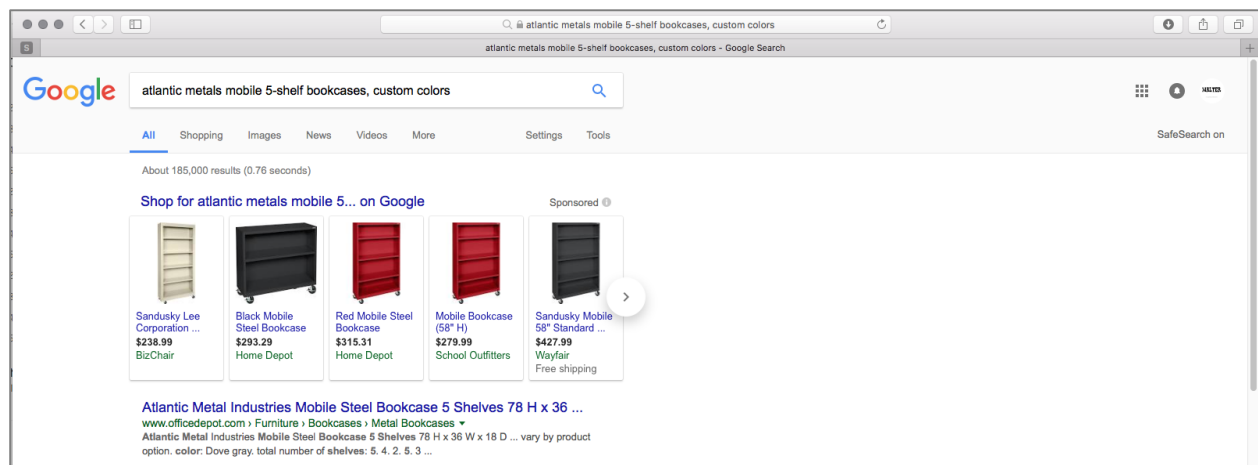
☐ URL Encode Data Values

☐ Allow Multiple Values

Item Delimiter: ,

Delimiter Escape: \

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



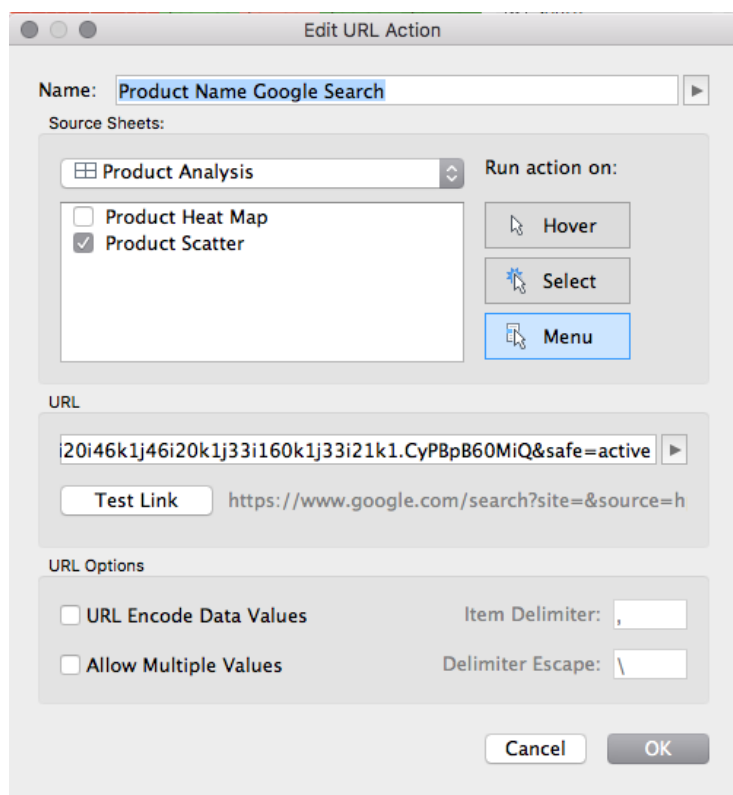
**Step 9:** Copy-paste the URL into a text editor. Note the search terms within the URL:

```
//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:

The screenshot shows the 'Edit URL Action' dialog box. The 'Name' field is 'Product Name Google Search'. Under 'Source Sheets', 'Product Analysis' is selected. Under 'Run action on:', 'Select' is chosen. The 'URL' field contains a Google search query. 'URL Options' are unchecked. 'Cancel' and 'OK' buttons are at the bottom.

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