

Welcome {USER_FIRSTNAME}!

To get started log into the virtual machine provided please use T **LabUser** and the password T **Passw0rd!**

Notice the green text above? You can click that and the machine will type that text wherever the cursor is targeted.

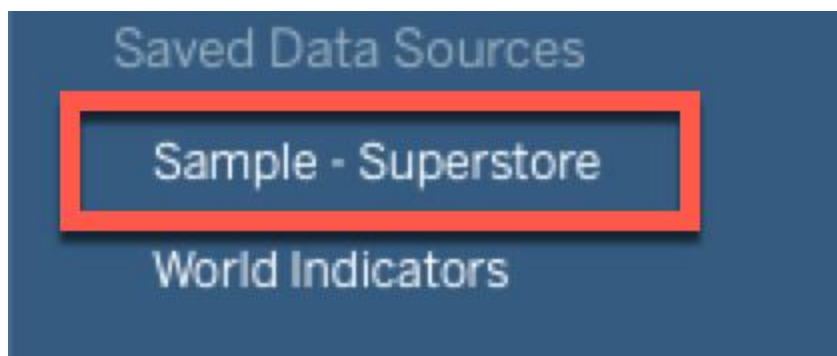
At this time please enjoy the lab and click around, this is your isolated instance and nothing you do will persist unless you capture a differencing disk. And we'll get into that during our training!

Thanks for being part of TC 23 and we look forward to this journey together.

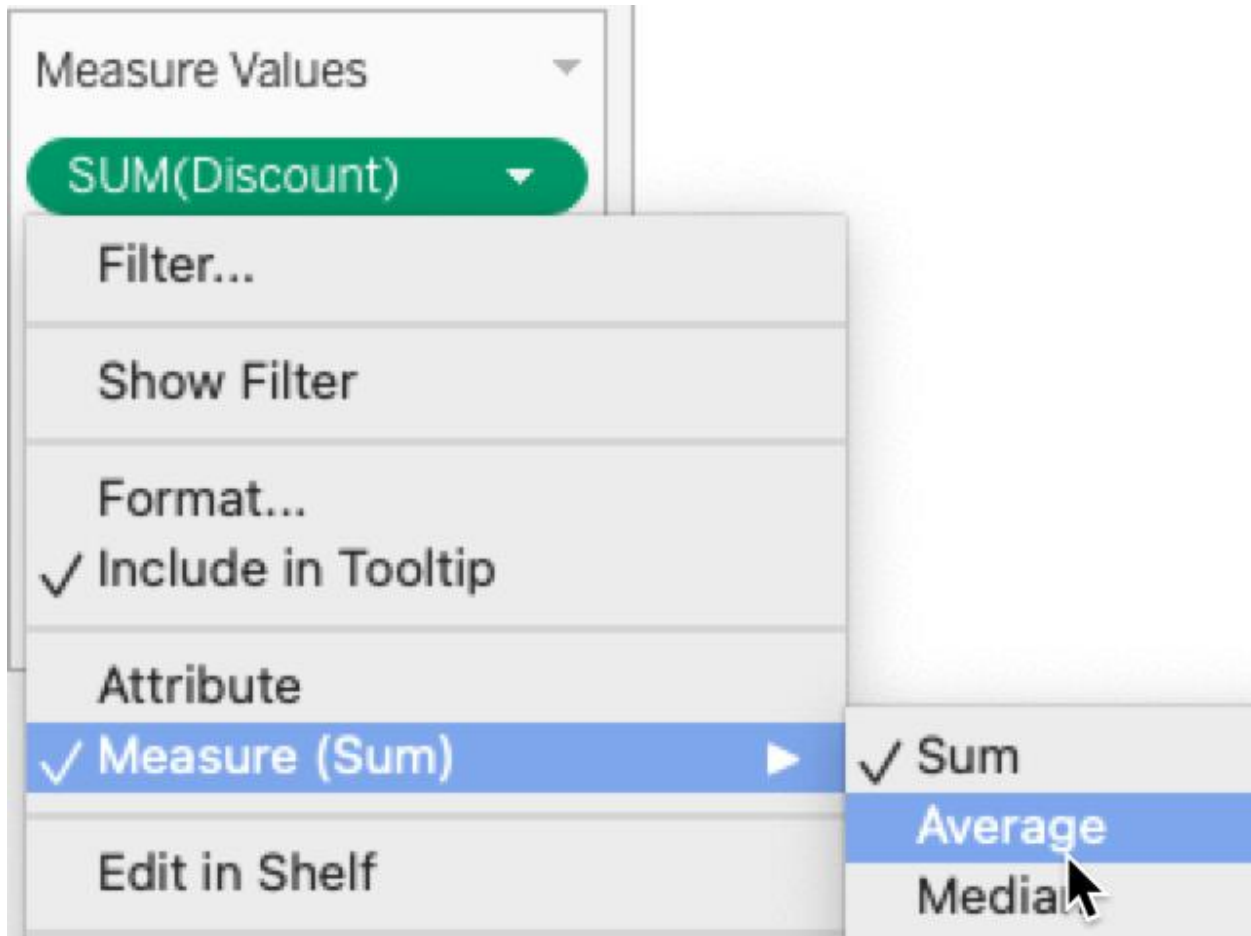
Creating Views

Ex1 - KPI Tile

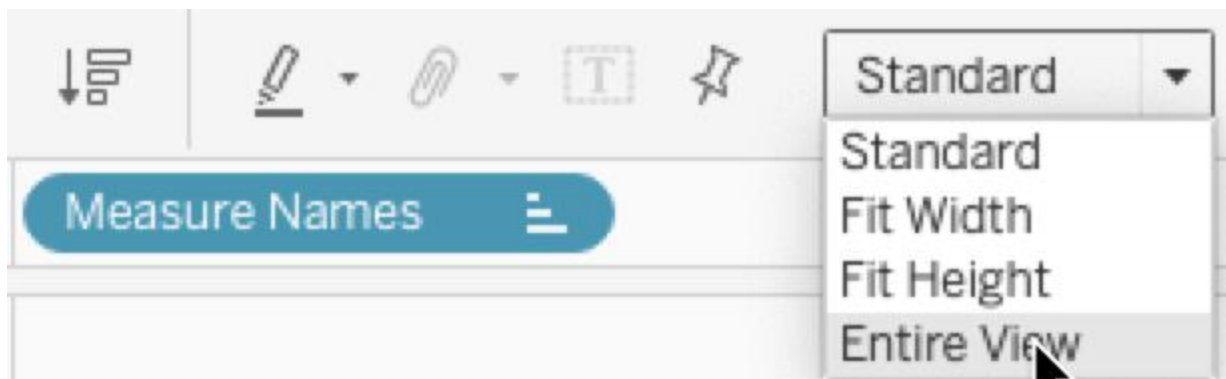
1. Open Tableau Desktop on your VM and Connect to the Sample - Superstore datasource under the Saved Data Sources section



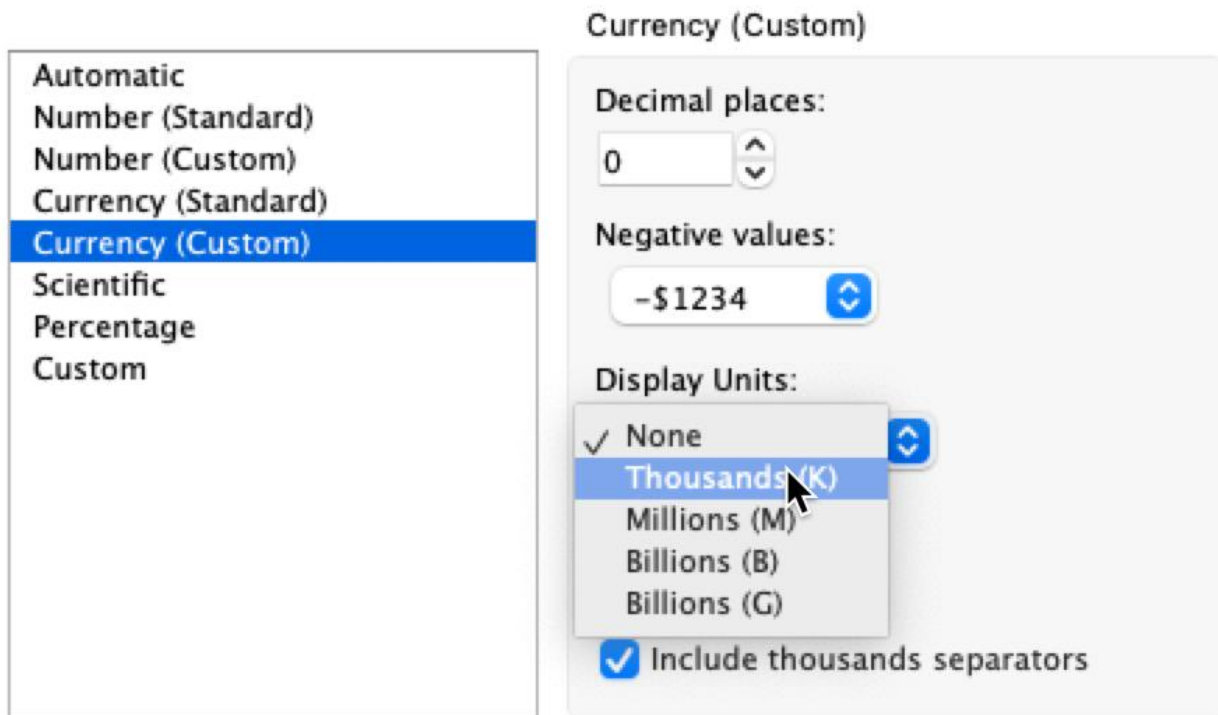
2. Rename the Sheet1 view to "**KPIs**"
3. Drag "**Measure Names**" to Columns and "**Measure Values**" to Text Field on **Marks** card
4. Filter the "**Measure Values**" and uncheck the measures with the prefix "Count"
5. Aggregating Discounts does not make sense. Hence let's change the aggregation to "**Average**" by selecting the inverted triangle to the right of "**Discount**" pill under **Measure Values**



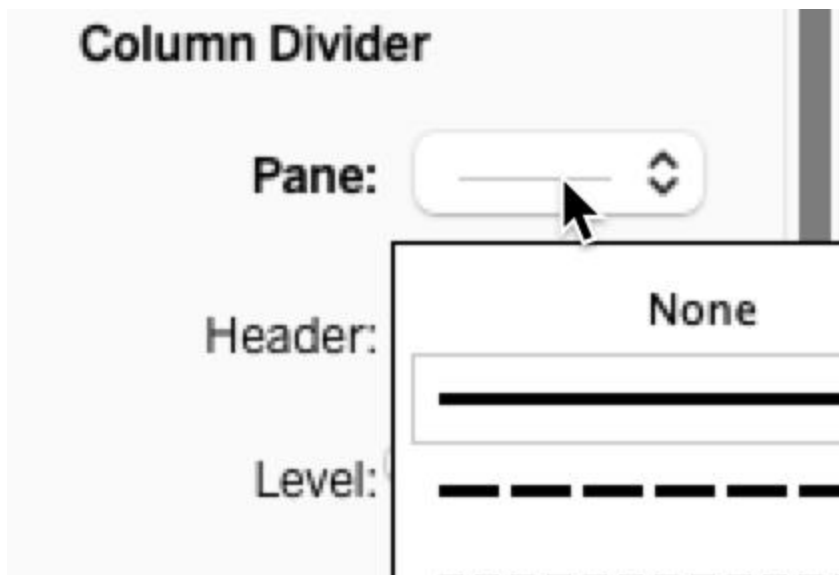
6. The Profit Ratio is percentage calculation. We need to change the formatting to display percentages. Select the "**Profit Ratio**" -> Format. On the left hand side, you will notice the Default Numbers format. Change that to percentage
7. Reorder the Measures in the following Order - Sales;Quantity;Profit;Profit Ratio; Discount
8. On the top menu bar, change the View sizing to "**Entire View**"



9. Let's change the Formatting for **Sales** and **Profit**. Select the Sales -> Format -> Numbers -> Currency(Custom). Remove Decimal places and change the Display Units to "Thousands"



10. Let's Bulk Format all the measure values by selecting the **Measure Values** pill -> Format option from the Marks card. Under Default Font -> Increase size to 14 and make it **Bold**. Also change the alignment -> Horizontal -> Center
11. Repeat the same formatting selections for **Measure Names** by selecting the Measure Names pill on the Columns. Along with Font and alignment, you can also add shading to a color of your choice
12. Select Borders icon and add a line to the Column Divider



13. Increase the header size by dragging the Measure Values header
14. Click on "**Tooltip**" under Marks card and clear the values

Ex2 - Profit Ratio Map

1. Add a new worksheet and name it "**Profit Ratio Map**"
 2. To create a US Map View, double click the **State** dimension under the **Location hierarchy**
 3. Drag and drop the **Country/Region** dimension to **Filter** section and Filter the data only for "United States"
 4. Drag and drop the **Profit Ratio** Measure to the **Colors** section of the Marks card
 5. Select the "**Profit Ratio**" -> **Format** on the Marks card -> Select **Pane** Tab -> **Default** -> **Numbers** -> **Percentage**
-

Ex3 - Profit Ratio by City (Viz in Tool tip)

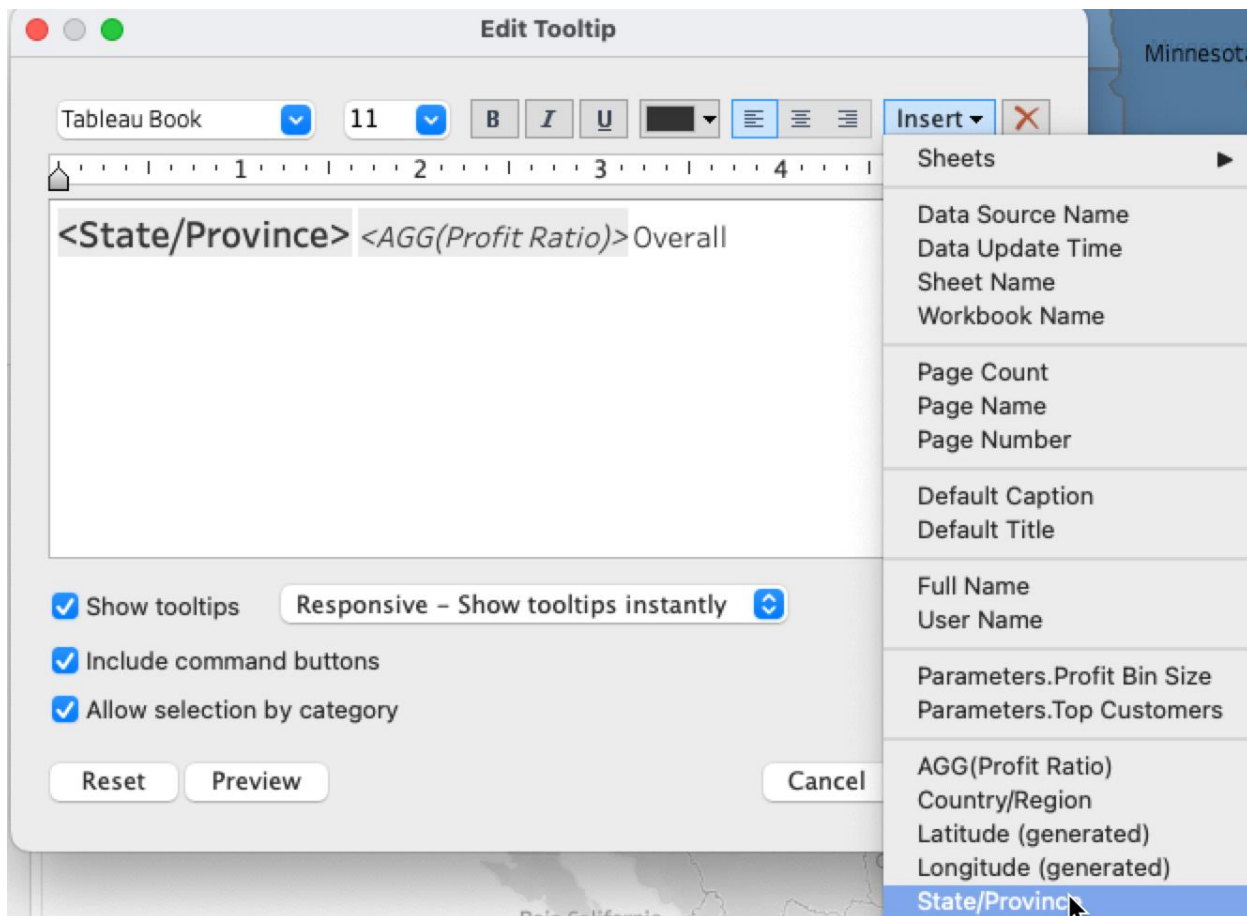
1. Add a new worksheet and name it "**Profit Ratio MapBy City**"
2. Drag "**City**" dimension to Rows and "**Profit Ratio**" measure to Columns
3. Add "**Profit Ratio**" to Color Mark
4. Sort **Profit Ratio** in Ascending Order (Least to Greatest)



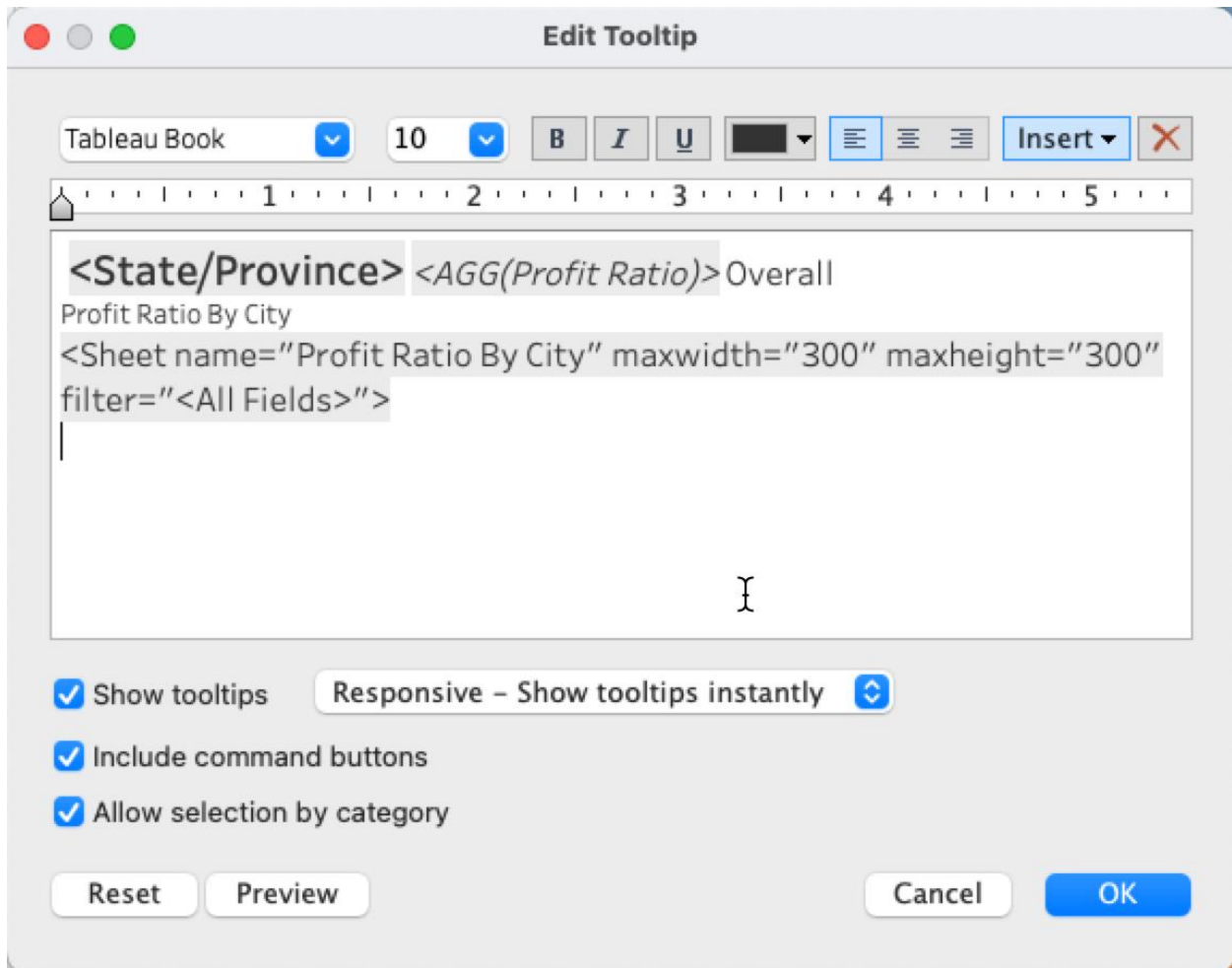
5. Add **Profit Ratio** to the Text Mark
 6. Select the "**Profit Ratio**" -> **Format** on the Marks card -> Select **Pane** Tab -> **Default** -> **Numbers** -> **Percentage**. Reduce the decimal point to 1 and the make the values *Italicized*
-

Ex4 - Inserting the Viz in Tool tip


1. Navigate to Profit Ratio Map
2. Click the **Tooltip** button on the Marks card to edit the tooltip and clear the default tooltip text
3. Click the **Insert** button on the top right and insert "**State/Province**" dimensions and increase its Font size to 14 and make it Bold
4. Insert "**Profit Ratio**" and increase its Font size to 12 and Italicized.
5. Add the text "Overall" as shown below



6. Type Enter/Return key and type the text "Profit Ratio By City"
7. Now Insert the sheet "**Profit Ratio By City**".



Ex5 - Sales By Segment Area Chart

1. Create a new calculated field - "Order Profitable?" and copy the formula  `{fixed [Order ID]:sum([Profit])}>0` - This formula calculates the Profit at the Order Level
2. Drag "**Order Date**" dimension to Columns and change the date to **Month (Continuous)**

YEAR(Order Da.. ▾)

Filter...

Show Filter

Show Highlighter

Apply to Worksheets ▶

Sort...

Format...

✓ Show Header

✓ Include in Tooltip

Show Missing Values

✓ Standard Gregorian

ISO-8601 Week-Based

✓ Year 2015

Quarter Q2

Month May

Day 8

More ▶

Year 2015

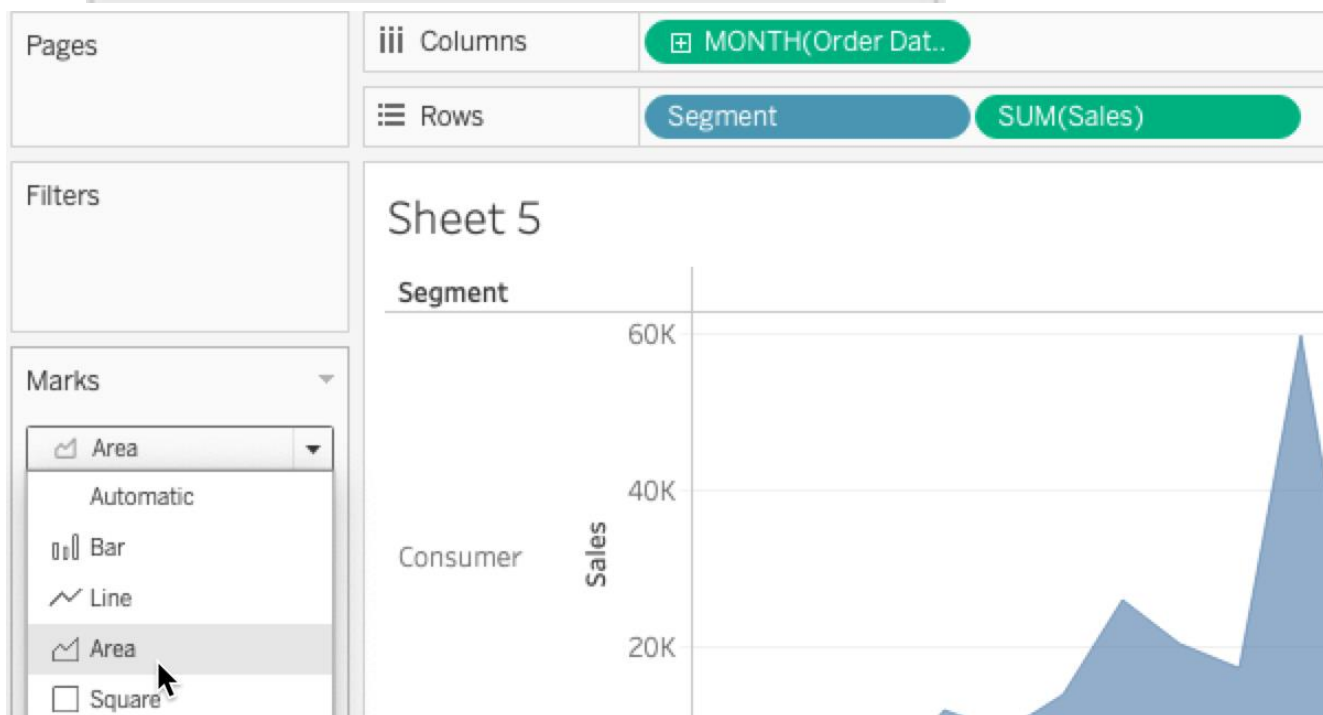
Quarter Q2 2015

Month May 2015

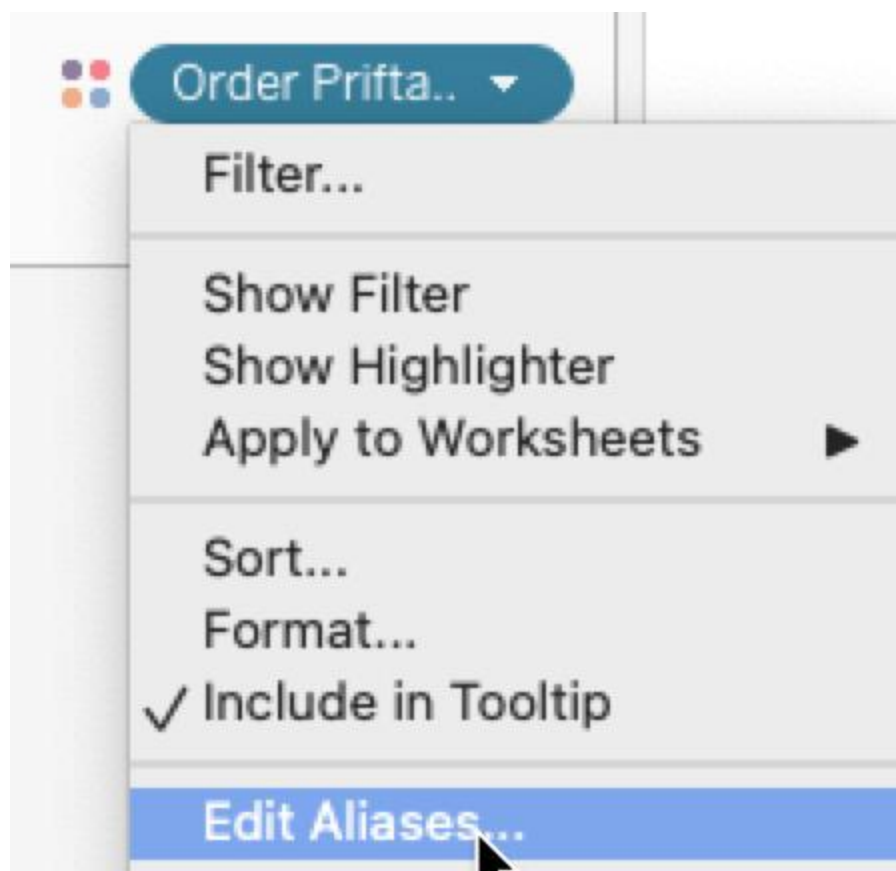
Week Number Week 5, 2015

Day May 8, 2015

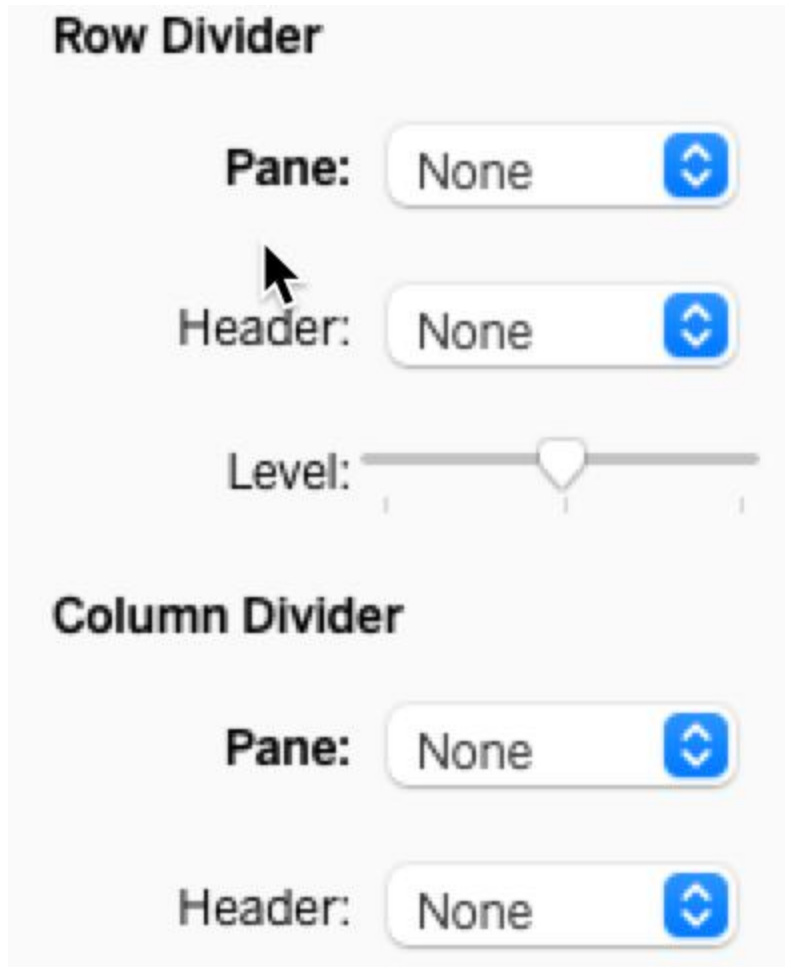
3. Drag "**Segment**" dimension and "**Sales**" measure to Rows
4. Change the Marks to "**Area Chart**"



5. Drag the calculated field "**Order Profitable?**" to "**Color Mark**"
6. Right Click on "**Order Profitable?**" pill -> **Edit Aliases**
7. Edit the Alias Values **False** as **Not Profitable** and **True** as **Profitable**



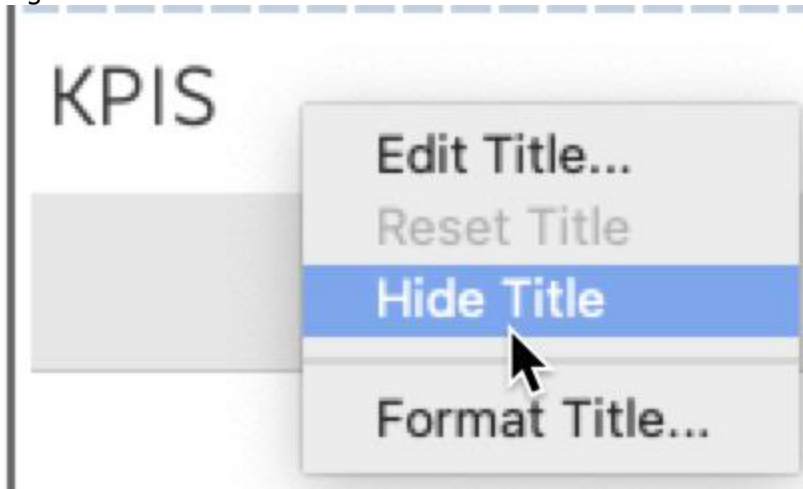
8. Select **Format Menu** -> **Lines** and -> **Rows** Tab -> Remove Grid lines by selecting "None"
9. Navigate to **Borders** -> **Sheet** Tab -> Remove the Divider lines for Rows & Columns



10. Remove **Sales** Header from the chart
11. Format Segment header by increasing the Font size to 11 and make it **Bold**
12. Additionally add **Profit** Measure to the **Details Mark**

Ex6 - Building the Dashboard


1. Click on the **"New Dashboard"** button at the bottom
2. Before we add the worksheets, let drag a **Vertical Container** on to the canvas
3. Navigate to **"Objects"** pane on the left and drag the **Text** object to the Container
4. Give the dashboard the Title "Executive Summary - Profitability Dashboard" and format the text to font size 14, Bold and Centered
5. Drag the **KPIs** worksheet and place it underneath the Text/Title Container
6. Right Click on the KPIs view header and hide the title




7. Drag **Profit Ratio Map** and place it underneath the KPIs sheet.
8. Hide the worksheet title and remove the legend
9. Drag a **Horizontal Container** fromn the Objects pane and place it underneath the Map
10. Drag the **Sales By Segment** sheet to the horizontal Container.Hide the worksheet title and remove the legend
11. Drag the **Data Story** and place it next to the "Sales By Segment" sheet within the Horizontal Container
12. When the **Data Story** modal pops up, select "Sales By Segment" Worksheet and click "Next"
13. In the next screen ignore **Month** Dimension by dragging the dimension to **"Ignored"** section

Extension: Data Story


Configure



Views



Fields



Story

Drag and drop fields to include in your story.

Dimensions

Segment ¹

Measures

SUM(Profit) ¹

SUM(Sales) ²

Ignored







Order Profitable?

MONTH(Order Date)

14. Click Next, leave the algorithm to Discrete and Click "Done"
15. Select the "**Profit Ratio Map**" and click on "**Use as filter**" button
16. Adjust the container sizes
17. The dashboard layout should be similar to the screenshot below

Item hierarchy

Dashboard 2

- ▼  Vertical Container
 - A Executive Summary - Profi...
 -  KPIS
 -  Profit Ratio Map
 - ▼  Horizontal Container
 -  Sales By Segment
 -  Data Story

Ex6 - Links for Reference



https://www.youtube.com/embed/Z8t4k0Q8e8Y&ab_channel=BBCNews

<https://www.tableau.com/solutions/gallery/visual-vocabulary>

https://www.tableau.com/sites/default/files/2021-10/Designing-Efficient-Workbooks-2021-Interworks_0.pdf

