Demand planning project

You are working for a company as a business analyst – you have a client as follows:

- Client is having manufacturing and distribution business of beauty products.
- Client has many products which require retail or wholesale stores to sell products and this company has tie up with many retails store and locked deals to sell their products in store or online.
- Now each store has different demand of the product in market and requires new inventory by some date – to meet the product demand of the end customer.

Here, you as an analyst collects demand data & want to automate the data in Tableau for performing analysis.

Solutions: Client's excel dataset will be migrated to Tableau with enhanced features to perform the analysis effectively and have global availability of reports

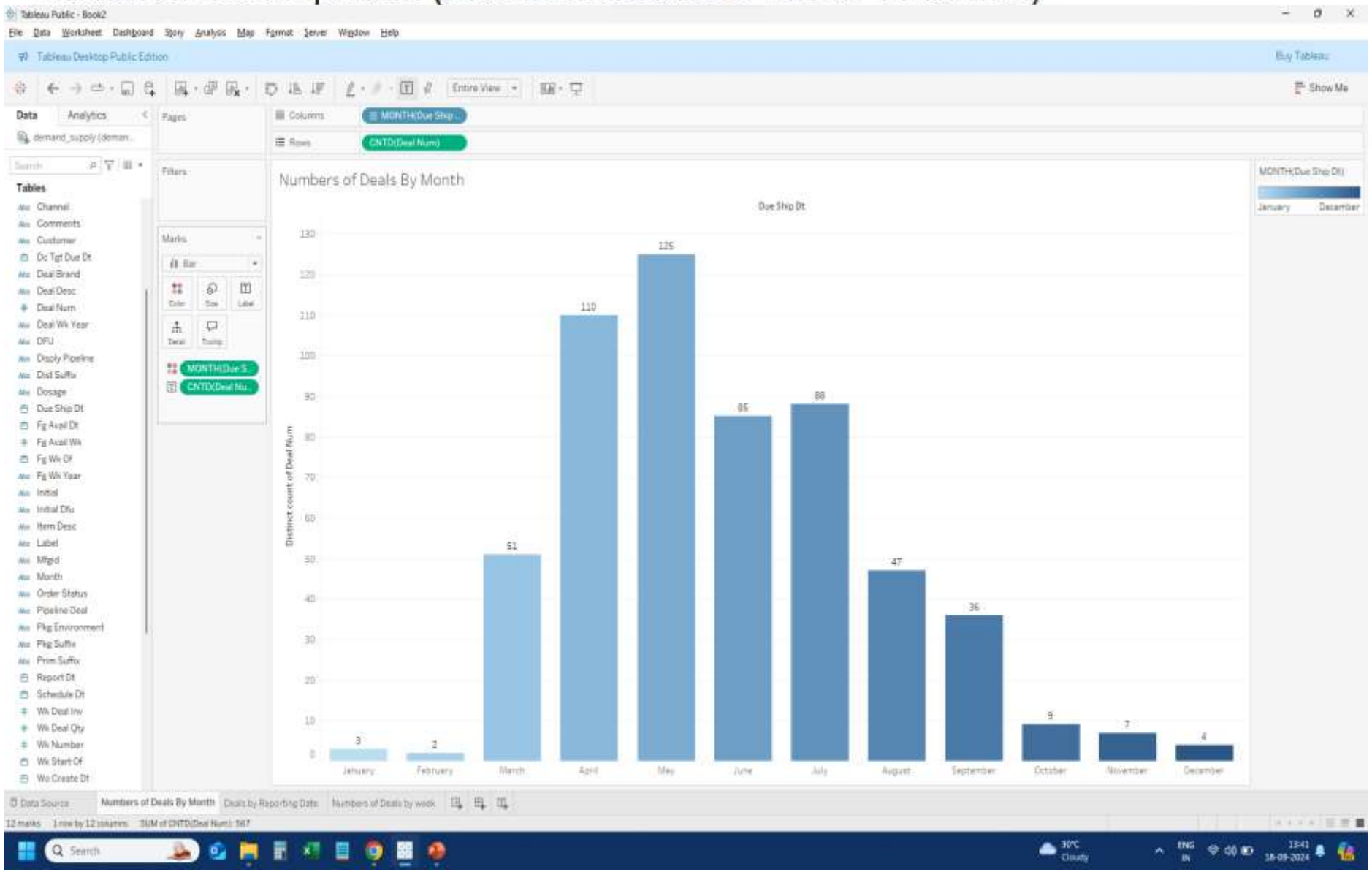
Tasks to do:

You are required to prepare dashboards as follows:

1. **Deal Dashboard** – Charts to be created furnishing deal by Month, Deal Inventory Details, Deal by Reporting Date and Deal by Week details
2. **Customer Dashboard** – Charts to be created furnishing Deal by Customer, Customer by Deal Qty, Deal Description by Deal Qty, Deal by Month and Deal by Week details
3. **Finished Good Dashboard** – Charts to be created furnishing FG Item Qty in Deals, FG Item in Dosage, Deal Description by Deal Qty, FG Item by Month and FG Item by Week
4. **Bulk Dashboard** – Charts to be created furnishing Bulk Item Qty in Deals, Bulk Item in Dosage, Deal Description by Deal Qty, Bulk Item by Month and Bulk Item by Week

To get you started steps to make first dashboard are mentioned in the subsequent slides!
Rest 3 you have to make on your own!
All the best.

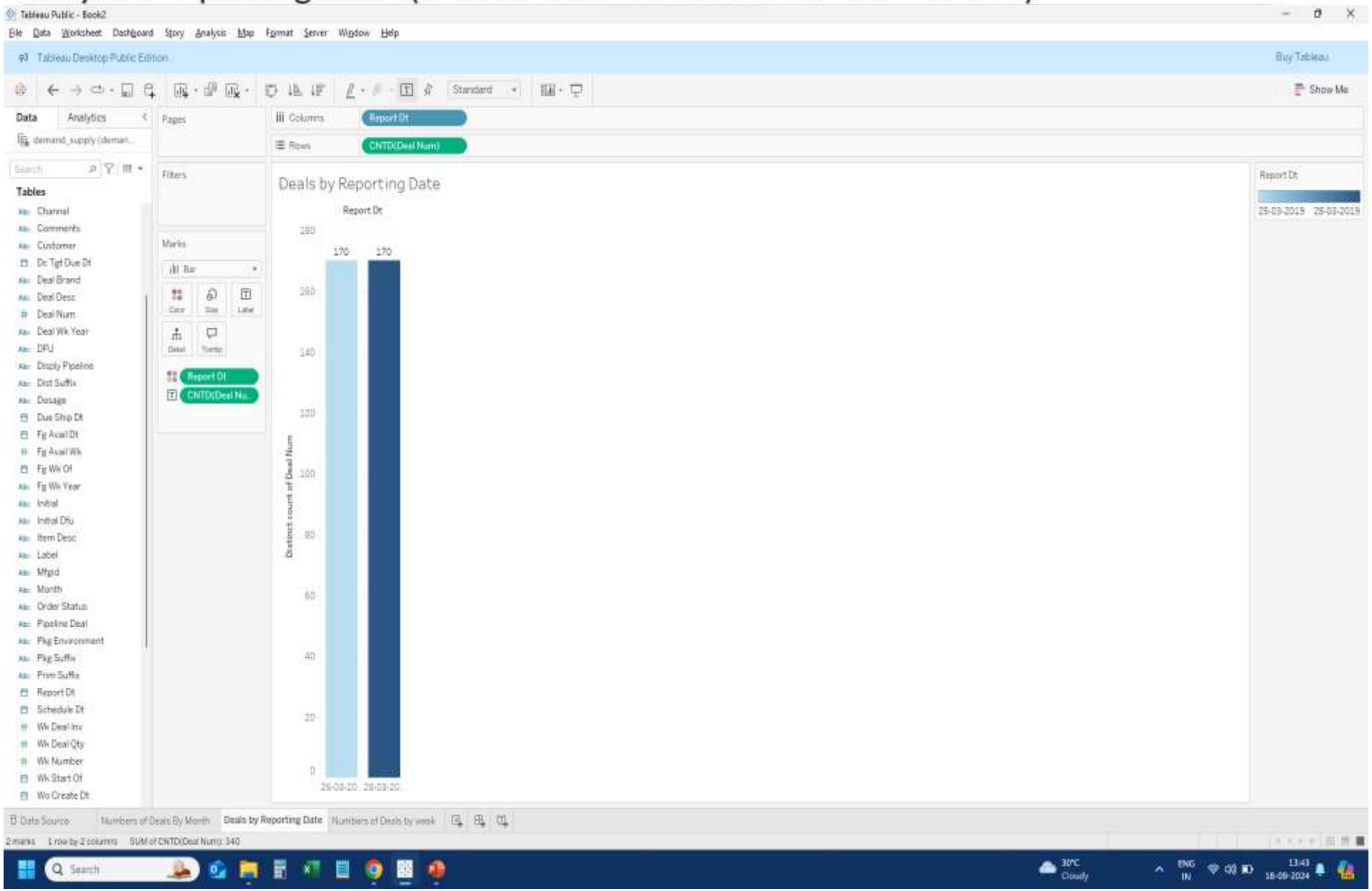
Sheet 1: Number of deals by Month – Show number of deals in a bar chart which are due for shipping using month of due ship date. (Month should be in MMM-YY format)



Steps to follow:

1. Drag ‘Due ship Dt’ into Column >> right click on it and convert that into custom – MY
2. Drag ‘Deal Num’ to row >> Right click and select Measure >> count (distinct)
3. On mark cart select ‘Bar’ instead of automatic to change the view
4. Drag ‘Due Ship Dt’ to color cart >> Right Click on it and convert into Month

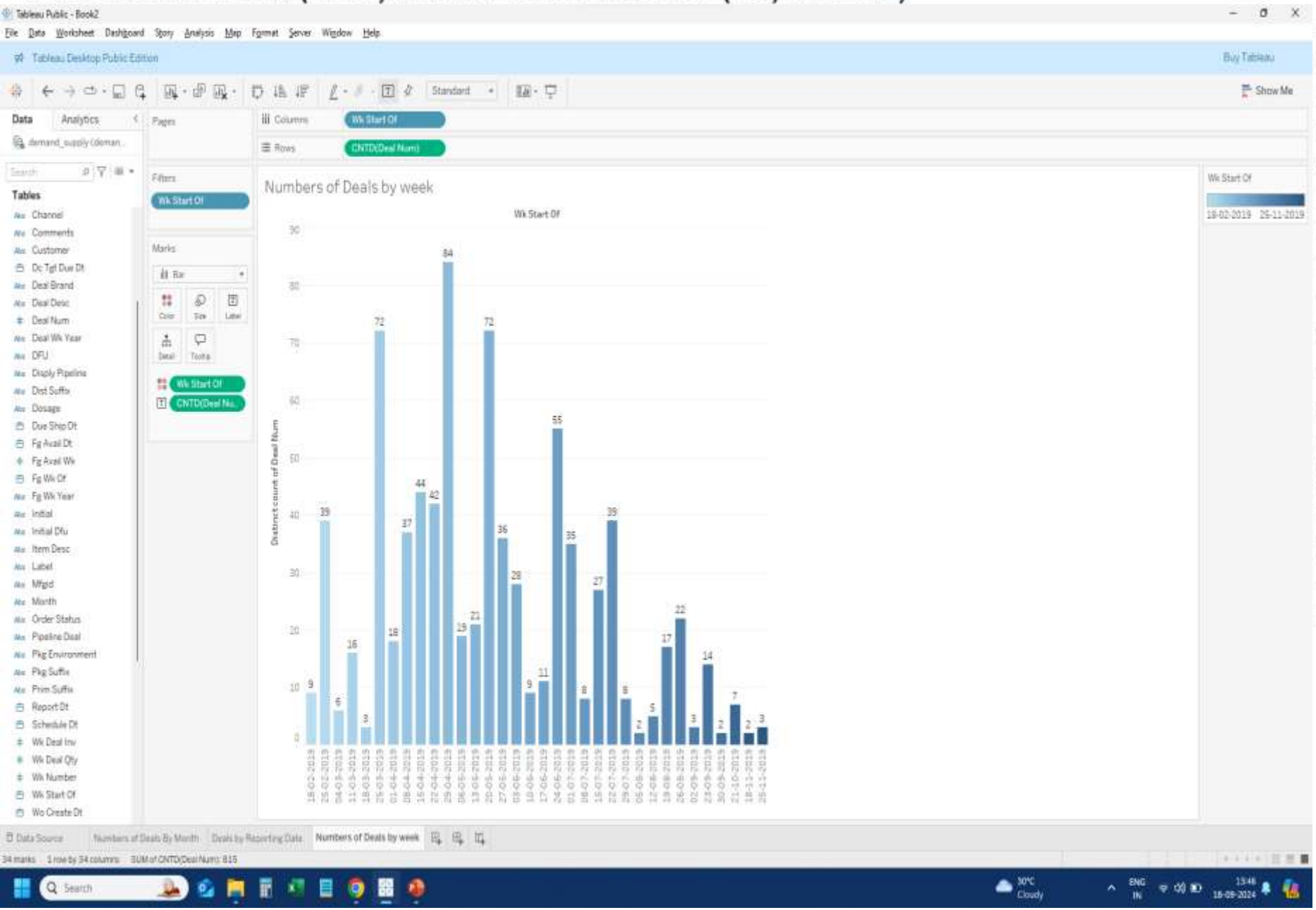
Sheet 2: Deals by Reporting Date: Show number of deals in a bar chart which are reported by end of the day i.e. Reporting date. (date should be in MM-DD-YYYY format)



Steps to follow:

1. Drag ‘Report Dt’ to Column >> convert it to Exact Date & discrete
2. Drag ‘Deal Num’ to Row >> Measure >> count (Distinct)
3. Drag ‘Report Dt’ to Color Cart >> have Exact Date
4. Select Bar on Mark Cart to change the view

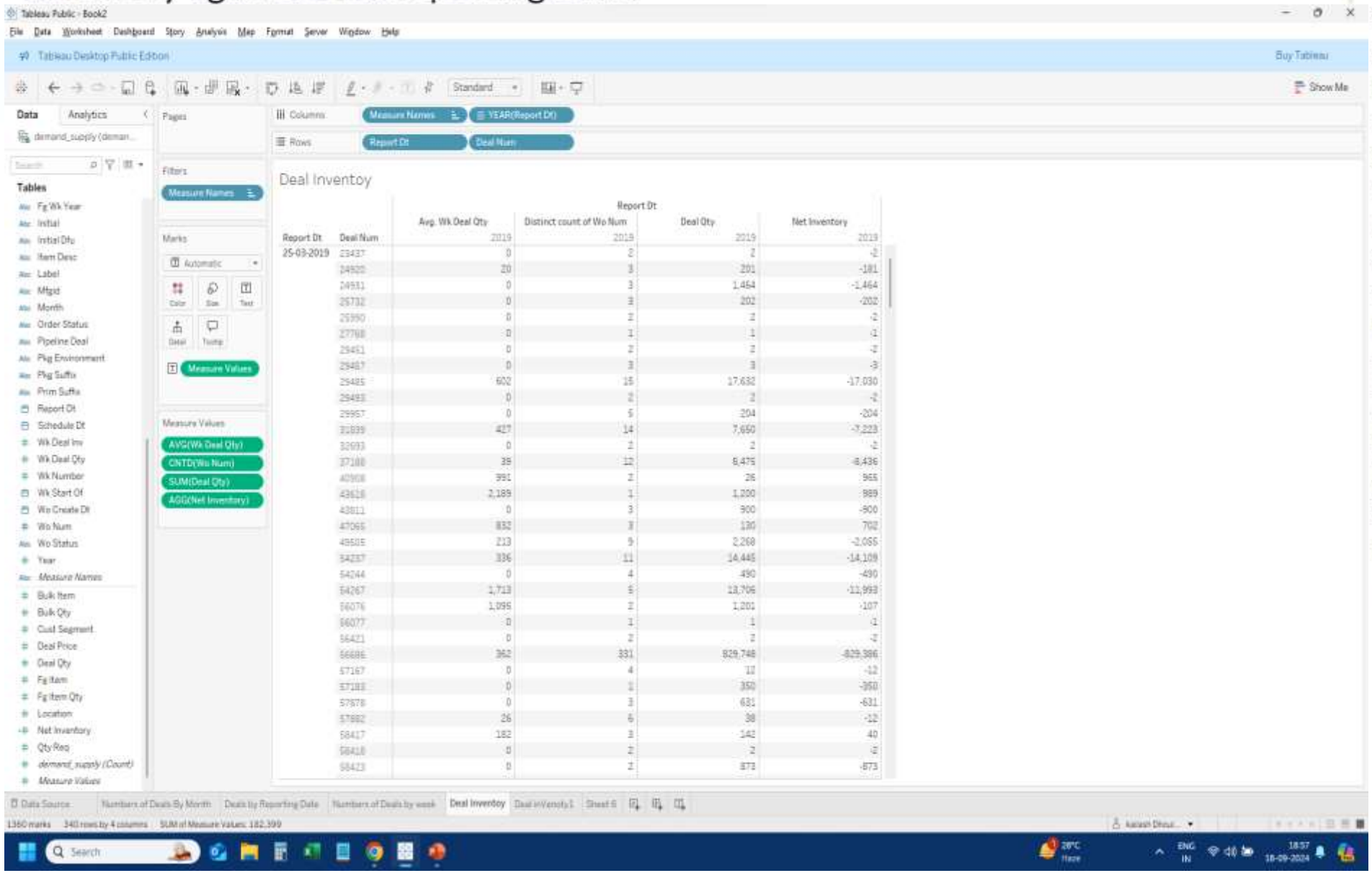
Sheet 3: Number of Deals by Week - Show number of deal in a bar chart for each week start of date. (week date should be in (WW) MMM-YY format i.e. (29) Feb-19)



Steps to follow:

1. Convert the data type of 'Wk Start Of' to date (right click in fields and change data type)
2. Drag 'Wk Start Of' to Column >> Right click >> convert to Exact Date >> make it discrete
3. Drag 'Deal Num' to Row >> Measure >> calculate distinct Count
4. Drag 'Wk Start Of' to color cart >> Right click >> Select exact Date
5. Right click week start of >> format to change the date format >> Select Custom in Dates >> Add format "(ww) mmm-yy"

Sheet 4: Deal Inventory – Show reporting date, deal number, deal description, deal quantity, average week deal quantity, net inventory and count of work order numbers. Show them in a cross tab as a detail of deal inventory against each reporting date.



Steps to follow:

1. Drag Report Dt, Deal Num to Row and Measure Name to Column
2. Create Calculated Field 'Net Inventory' having formula AVG([Wk Deal Qty])-SUM([Deal Qty])
3. Drag Deal Qty, Wk Deal Qty, Net Inventory and Wo Num to rows >> Right Click Wo Num >> Measure >> count(Distinct)>> right click 'Wk Deal Qty' >> Measure >> Average
5. Select Text Table from 'show me' to have grid view

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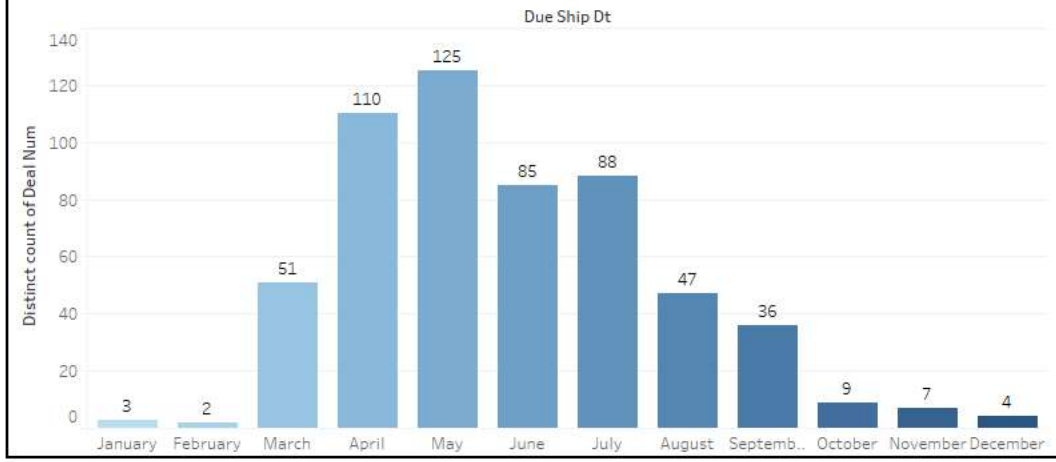
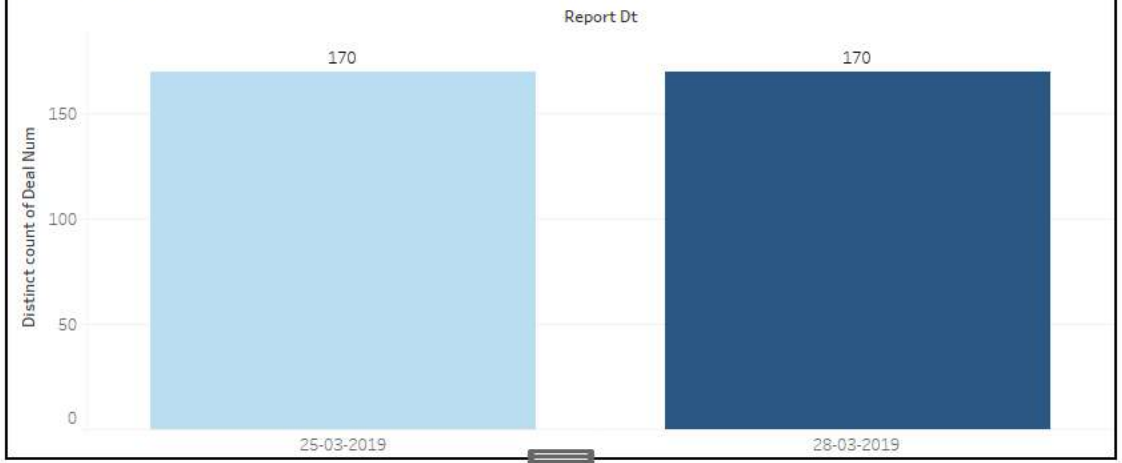
Show dashboard title

Deal Dashboard

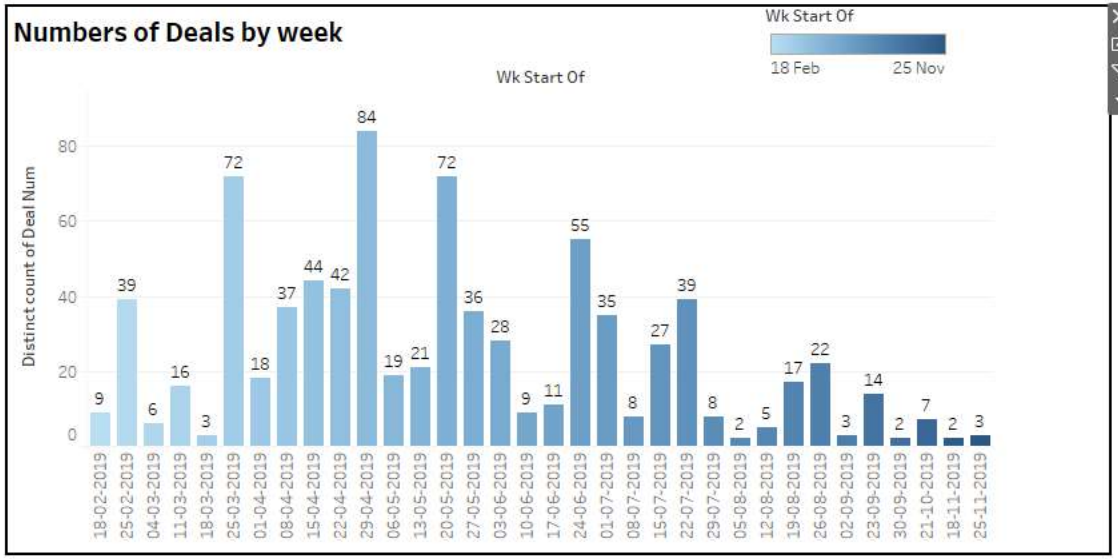
Numbers of Deals By Month



Deals by Reporting Date



Numbers of Deals by week



Deal Inventoy

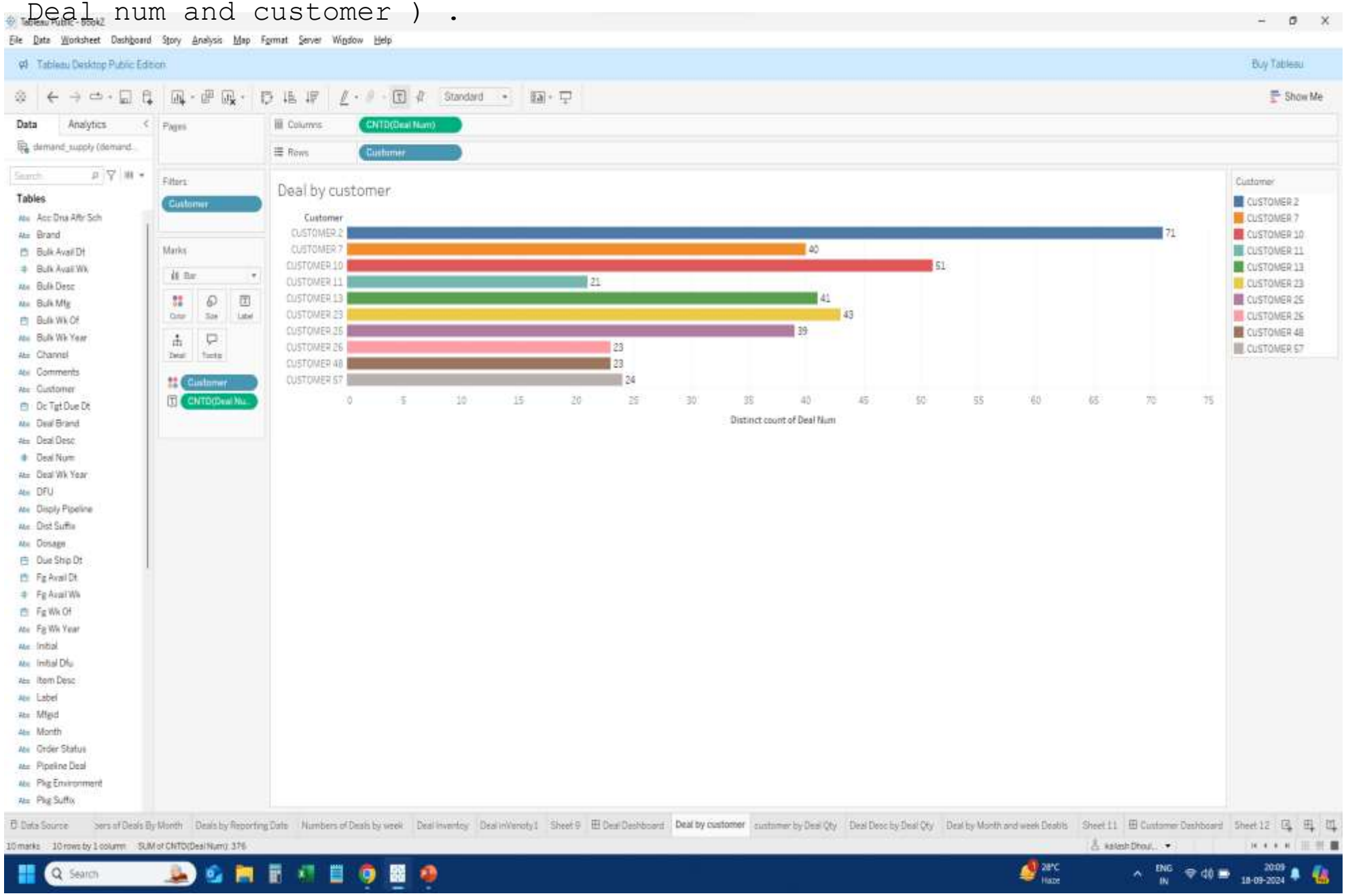
		Report Dt			
		Avg. Wk Deal Qty	Distinct count of Wo Num	Deal Qty	Net Inventory
Report Dt	Deal Num	2019	2019	2019	2019
25-03-2019	23437	0	2	2	-2
	24920	20	3	201	-181
	24931	0	3	1,464	-1,464
	25732	0	3	202	-202
	25990	0	2	2	-2
	27768	0	1	1	-1
	29451	0	2	2	-2
	29457	0	3	3	-3
	29485	602	15	17,632	-17,030
	29493	0	2	2	-2
	29957	0	5	204	-204
	31839	427	14	7,650	-7,223
	32693	0	2	2	-2
	37188	39	12	8,475	-8,436
	40908	991	2	26	965

Data Source | Numbers of Deals By Month | Deals by Reporting Date | Numbers of Deals by week | Deal Inventoy | Deal inVenoty1 | Sheet 9 | Deal Dashboard | Deal by customer | customer by Deal Qty | Deal Desc by Deal Qty | Deal by Month and week Deatils | Sheet 11 | Customer Dashboard | FG it

1360 marks | 340 rows by 4 columns | SUM of Measure Values: 182,399

Search | 28°C Cloudy | ENG IN | 11:56 19-09-2024

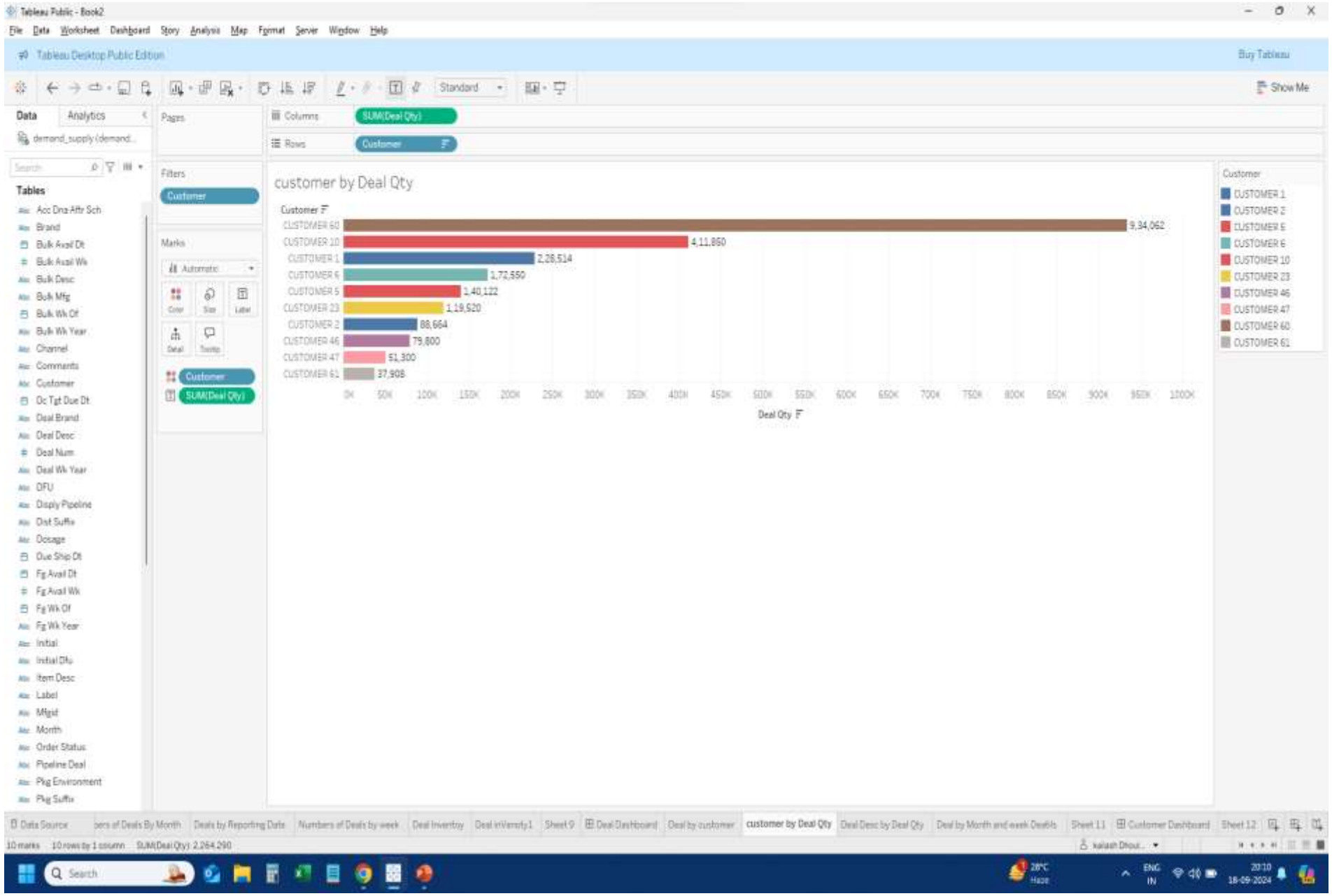
Deal by Customer: Show number of deals in bar chart which are all deal with customer (using Deal num and customer) .



Steps to follow:

1. Drag ' Deal Num ' into column >> right click on it and select measure >> count(distinct)
2. Drag 'customer' into row
3. Drag ' customer' to color cart
4. Drag ' Deal Num ' into label cart >> right click on it and select measure >> count(

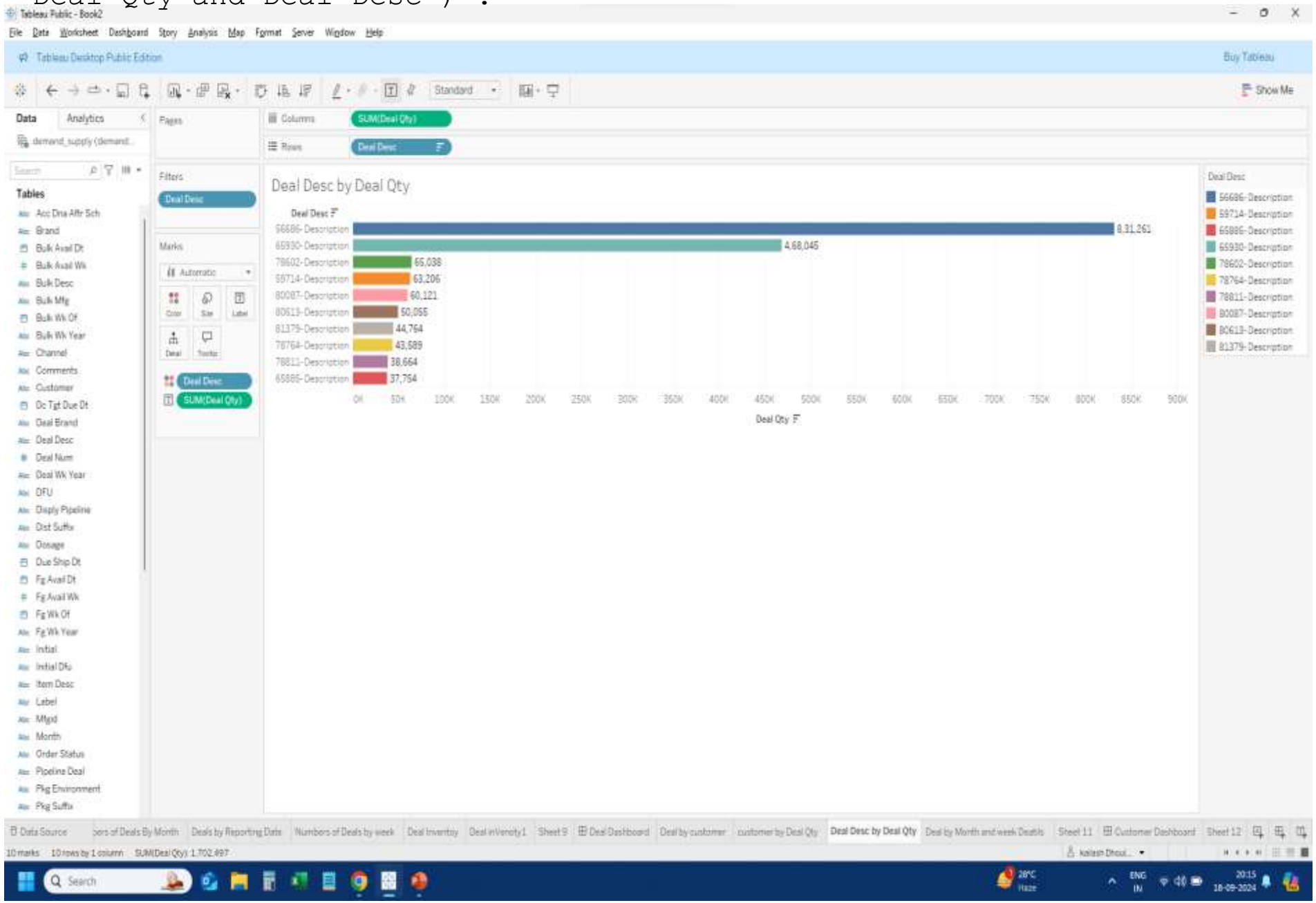
Customer by Deal Qty: Show Sum of deals quantity in bar chart which are all sum of deal Qty with customer (using Deal Qty and customer) .



Steps to follow:

1. Drag ' Deal Qty ' into column >> right click on it and select measure >> sum
2. Drag 'customer' into row
3. Drag ' customer' to color cart
4. Drag ' Deal qty ' into label cart >> right click on it and select measure >> sum
5. Drag 'customer' to

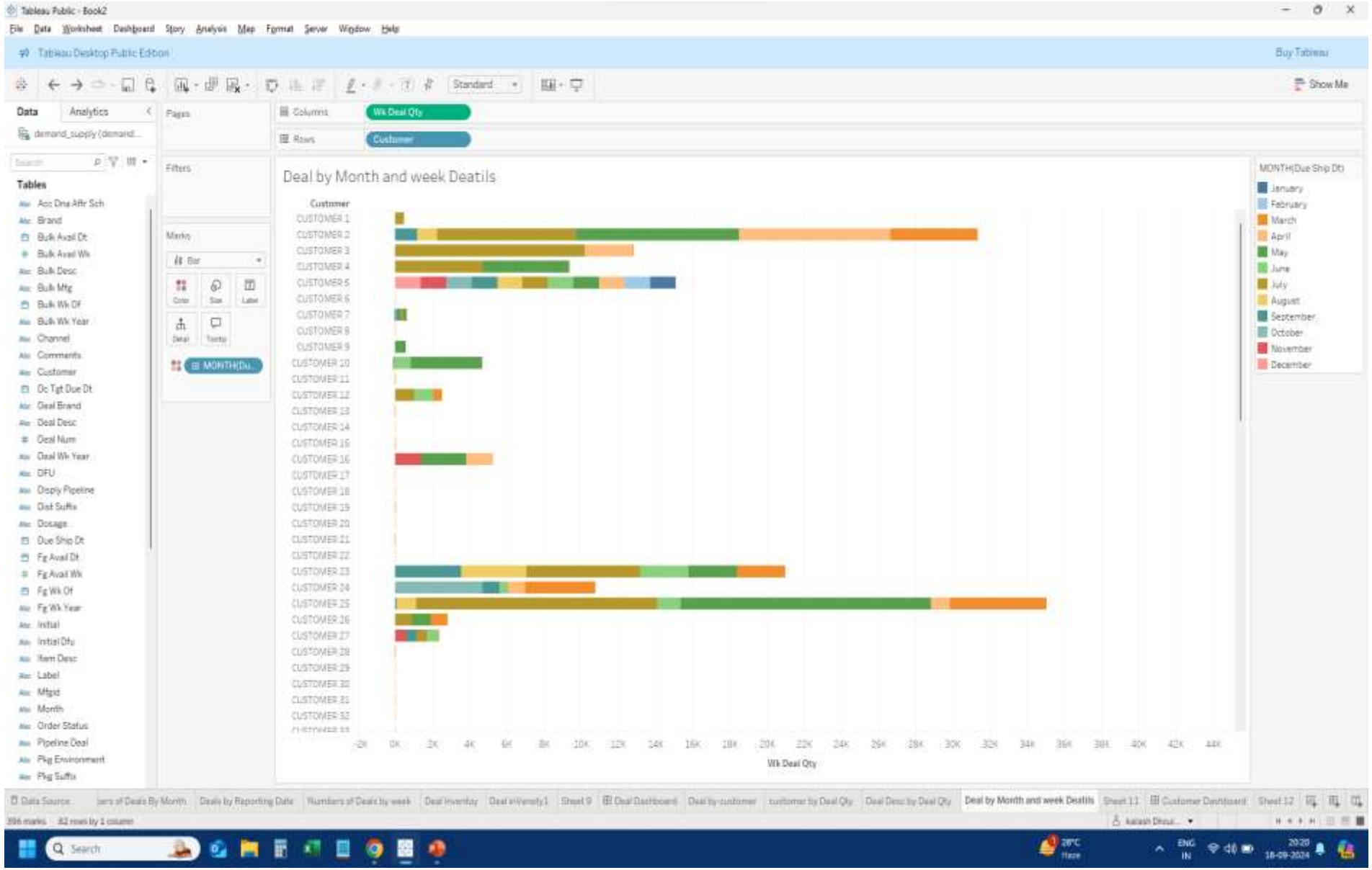
Deal desc by Deal Qty: Show Sum of deals quantity in bar chart which are all Deal desc(using Deal Qty and Deal Desc) .



Steps to follow:

1. Drag ' Deal Qty ' into column >> right click on it and select measure >> sum
2. Drag 'Deal Desc' into row
3. Drag 'Deal Desc' to color cart
4. Drag ' Deal qty ' into label cart >> right click on it and select measure >> sum
5. Drag 'Deal Desc' to filter >>

Deal by Month and Week details: Show deals quantity by week and Month in bar chart which are all Deal Qty with customers(using Wk Deal Qty and Customer) .



Steps to follow:

1. Drag ‘wk Deal Qty ‘ into column
2. Drag ‘customer’ into row
3. Drag ‘ Due ship date’ into color cart >> right click on it and select Month

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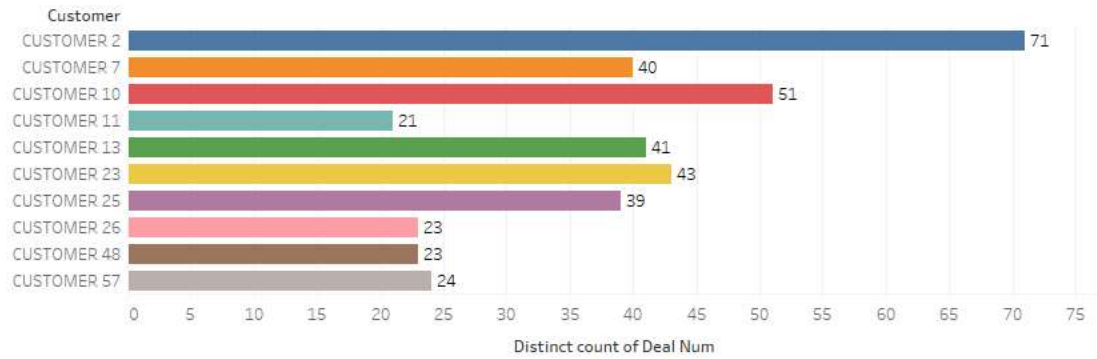
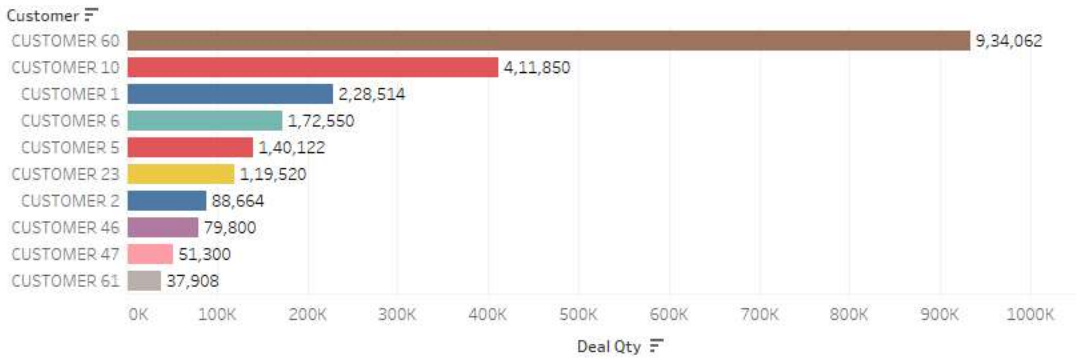
Show dashboard title

Customer Dashboard

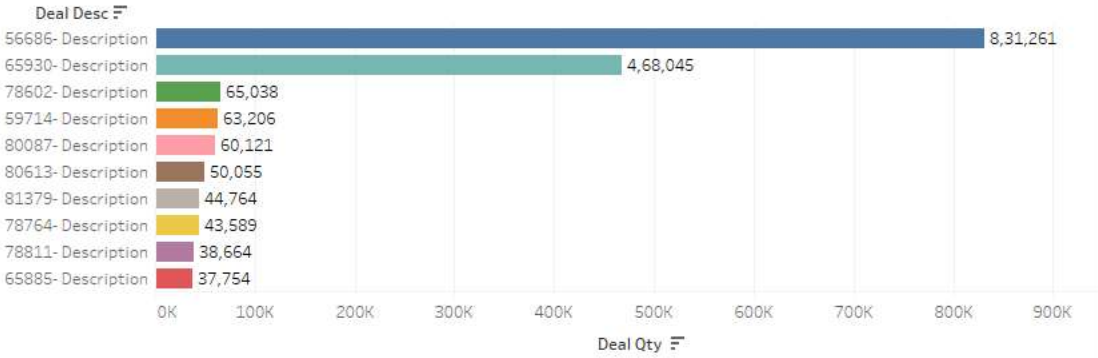
Deal by customer



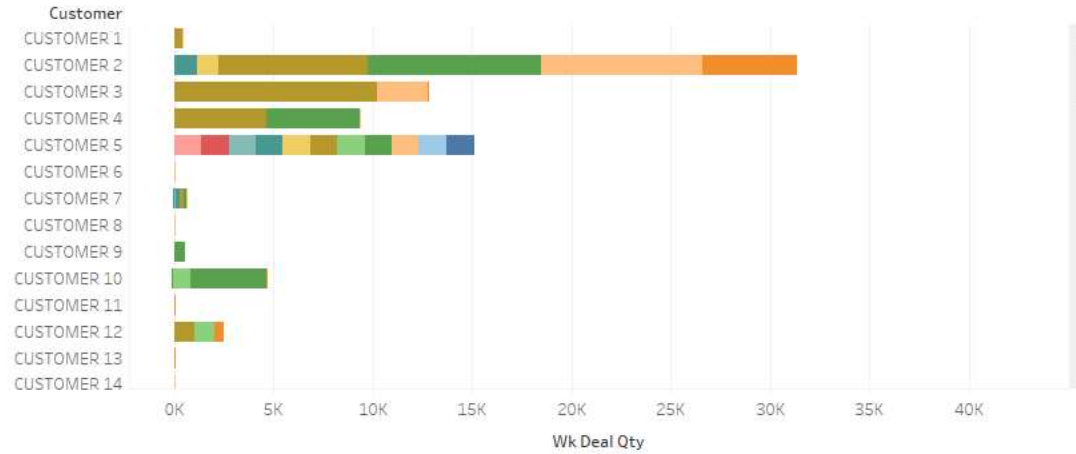
customer by Deal Qty



Deal Desc by Deal Qty



Deal by Month and week Deatils



Data Source | Numbers of Deals By Month | Deals by Reporting Date | Numbers of Deals by week | Deal Inventoy | Deal inVenoty1 | Sheet 9 | Deal Dashboard | Deal by customer | customer by Deal Qty | Deal Desc by Deal Qty | Deal by Month and week Deatils | Sheet 11 | Customer Dashboard | FG it

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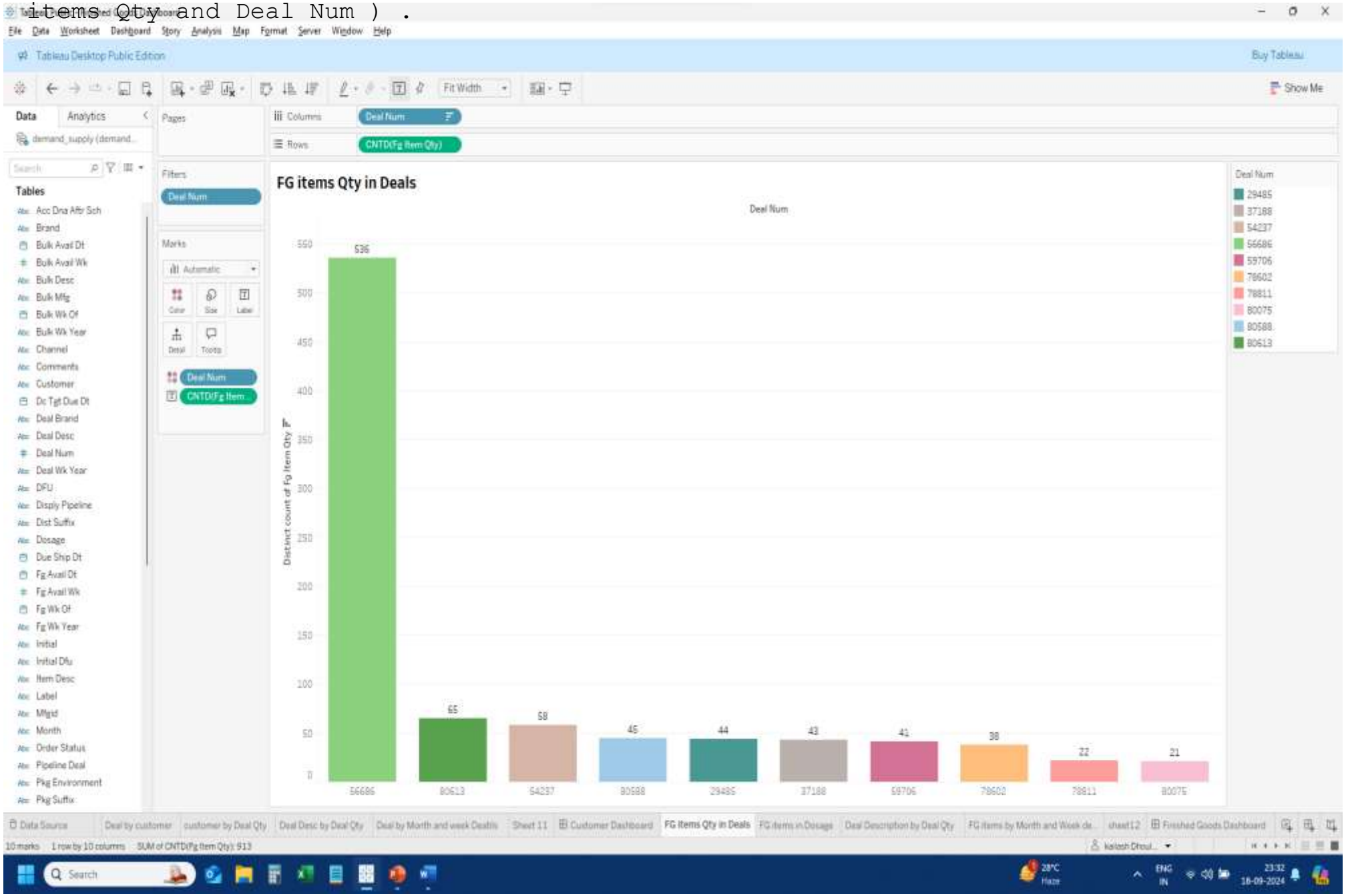
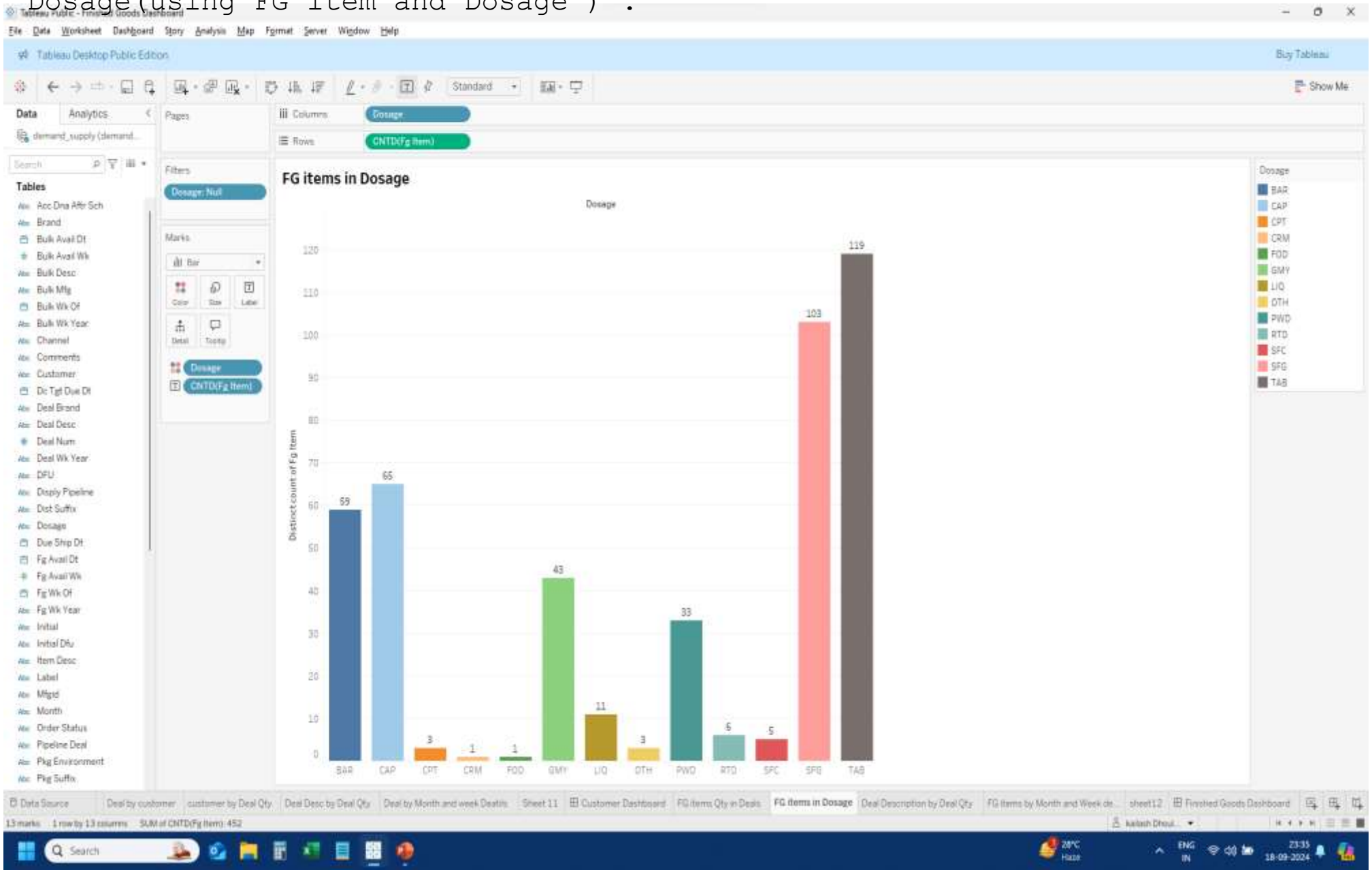
Finished Goods items Qty in Deals: show count of FG items Qty in bar chart which are all Deal Num(using FG items Qty and Deal Num) .



Steps to follow:

1. Drag 'FG items Qty ' into row >> right click on it and select measure >> count(distinct)
2. Drag 'Deal Num' into column and sort descending
3. Drag 'Deal Num' to color cart
4. Drag 'FG items Qty ' into label cart >> right click on it and select measure >> count(distinct)
5. Drag 'Deal Num' to filter >> right click on it >> select edit filter >> select Top and then select by field Top 10

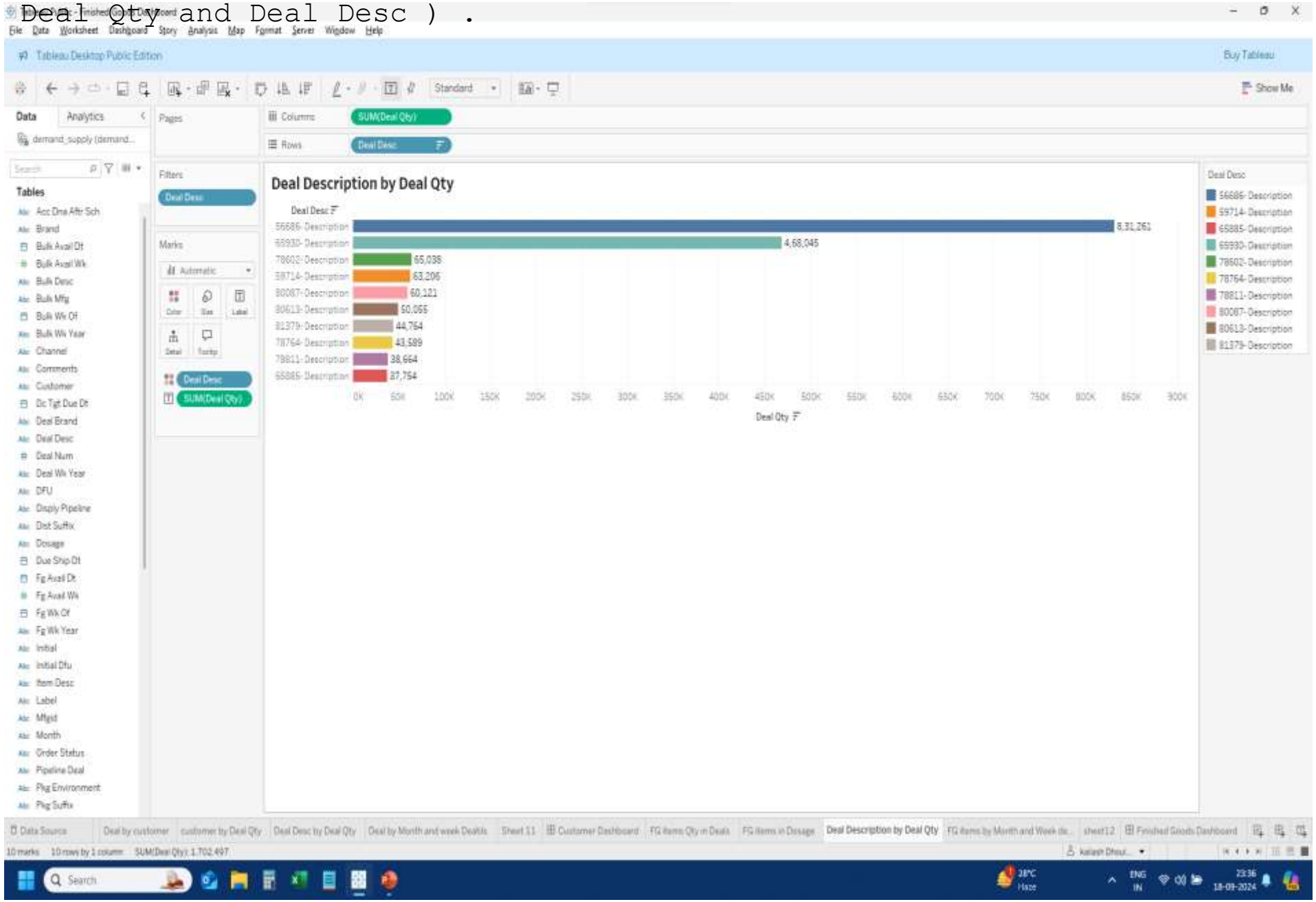
Finished Goods items in Dosage: Show count of FG items in bar chart which are all Dosage(using FG item and Dosage) .



Steps to follow:

1. Drag ‘FG item ‘ into row >> right click on it and select measure >> count(distinct)
2. Drag ‘Dosage’ into column
3. Drag ‘Dosage’ to color cart
4. Drag ‘FG item ‘ into label cart >> right click on it and select measure >> count(distinct)
5. Click on null

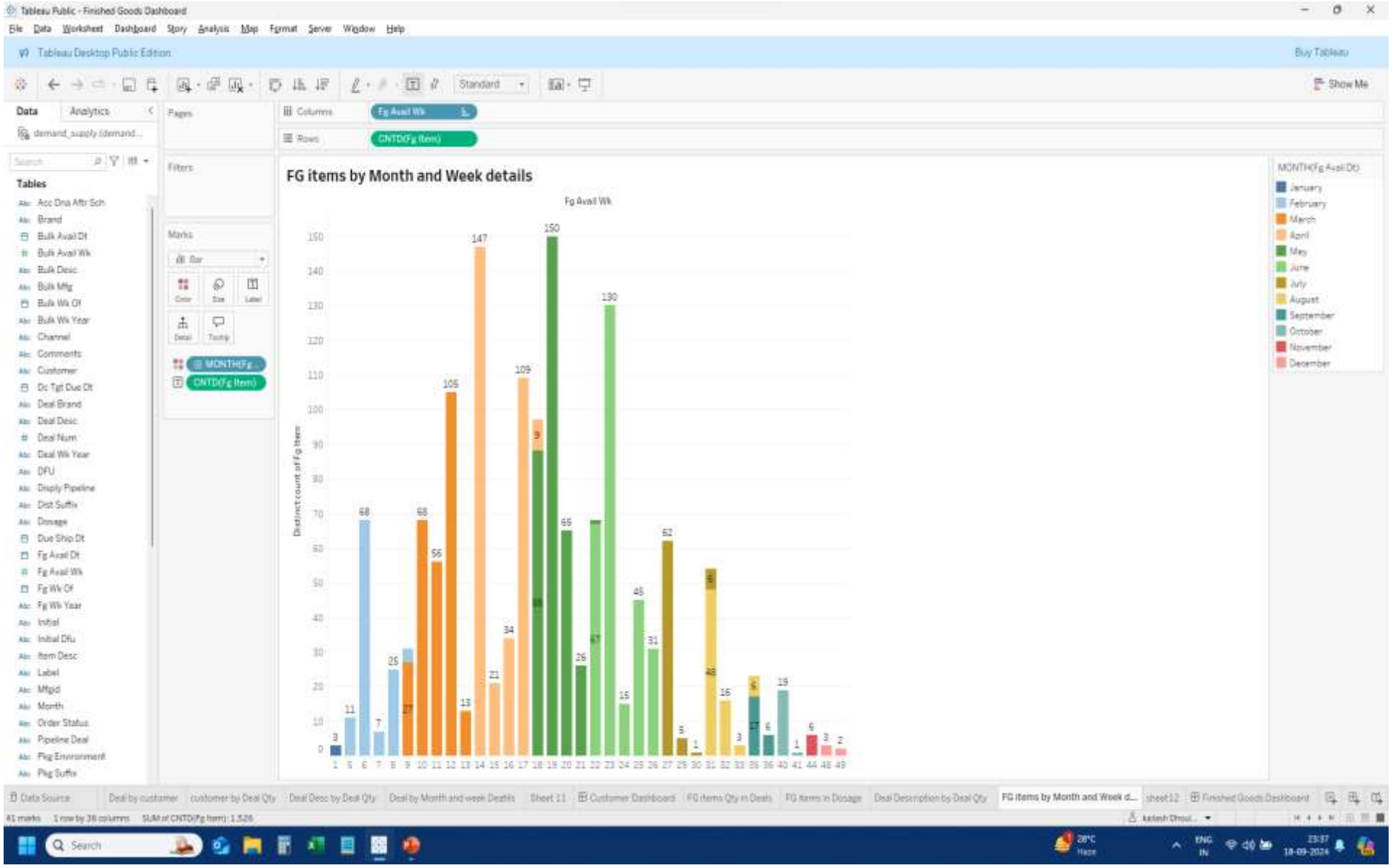
Deal desc by Deal Qty: Show Sum of deals quantity in bar chart which are all Deal desc(using Deal Qty and Deal Desc) .



Steps to follow:

1. Drag ' Deal Qty ' into column >> right click on it and select measure >> sum
2. Drag 'Deal Desc' into row
3. Drag 'Deal Desc' to color cart
4. Drag ' Deal qty ' into label cart >> right click on it and select measure >> sum
5. Drag 'Deal Desc' to filter >>

FG items by Month and Week details: Show FG items available by week and Month in bar chart which are FG Avail wk and month(using FG Avail Wk and FG item) .



Steps to follow:

1. Drag 'FG avail wk' into column
2. Drag 'FG item' into row >> right click on it and select measure >> count(distinct)
3. Drag ' FG Avail DT' into color cart >> right click on it and select Month
4. Drag 'FG item' into label cart >> right click on it and select measure >> count(distinct)

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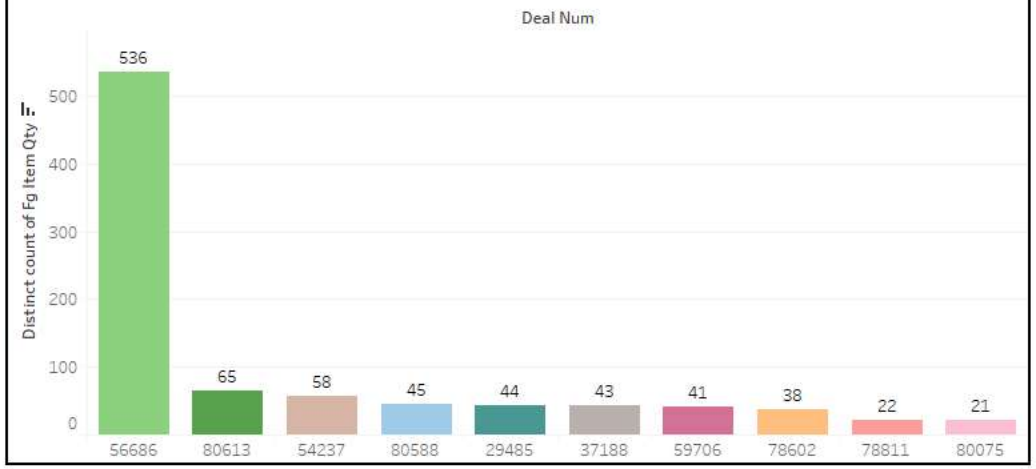
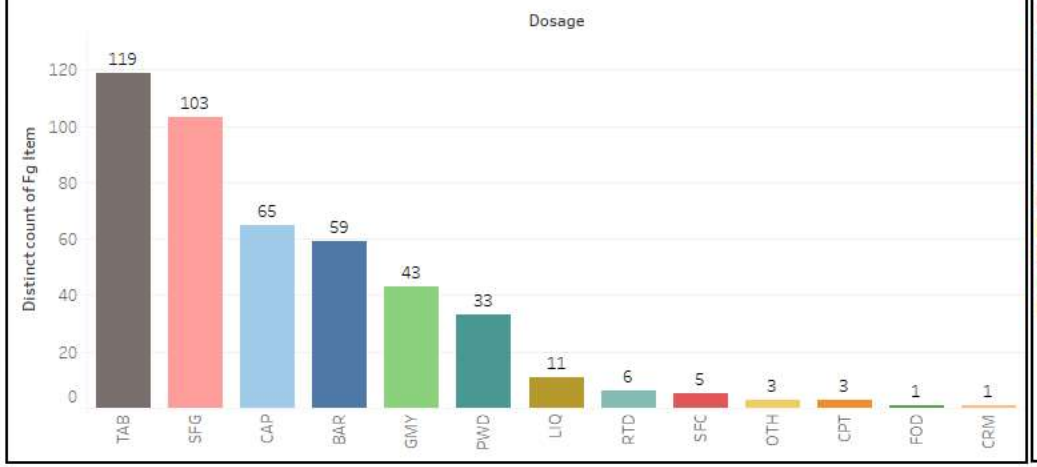
Finished Goods Dashboard

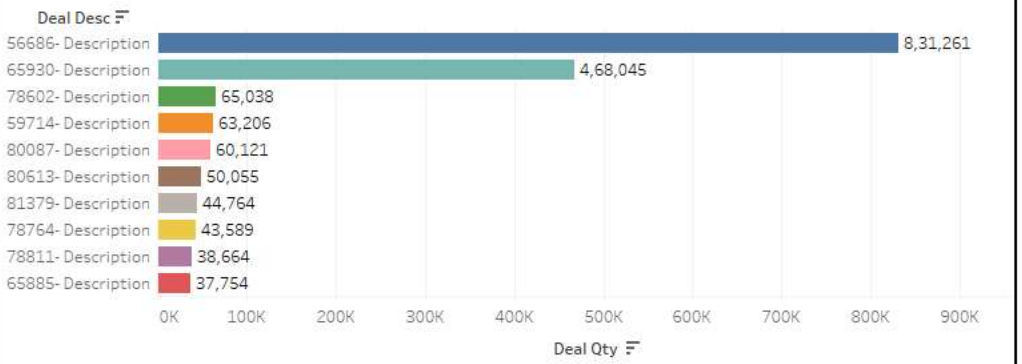
FG items Qty in Deals



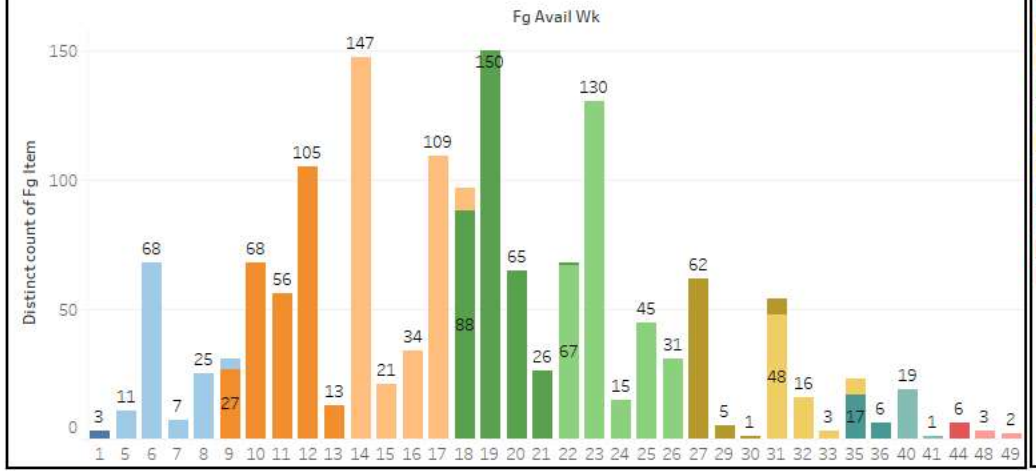
FG items in Dosage



Deal Description by Deal Qty



FG items by Month and Week details



Data Source | on by Deal Qty | Item desc by Fg Item Qty | FG items by Month and Week de... | sheet12 | Finished Goods Dashboard | Bulk item Qty in Deals | Bulk item in Dosage | Deal Desc by Deal QTY | BUlk Desc by Bulk QTY | Bulk item by Month and Week | Sheet 23 | Bulk Dashboard | Story 1

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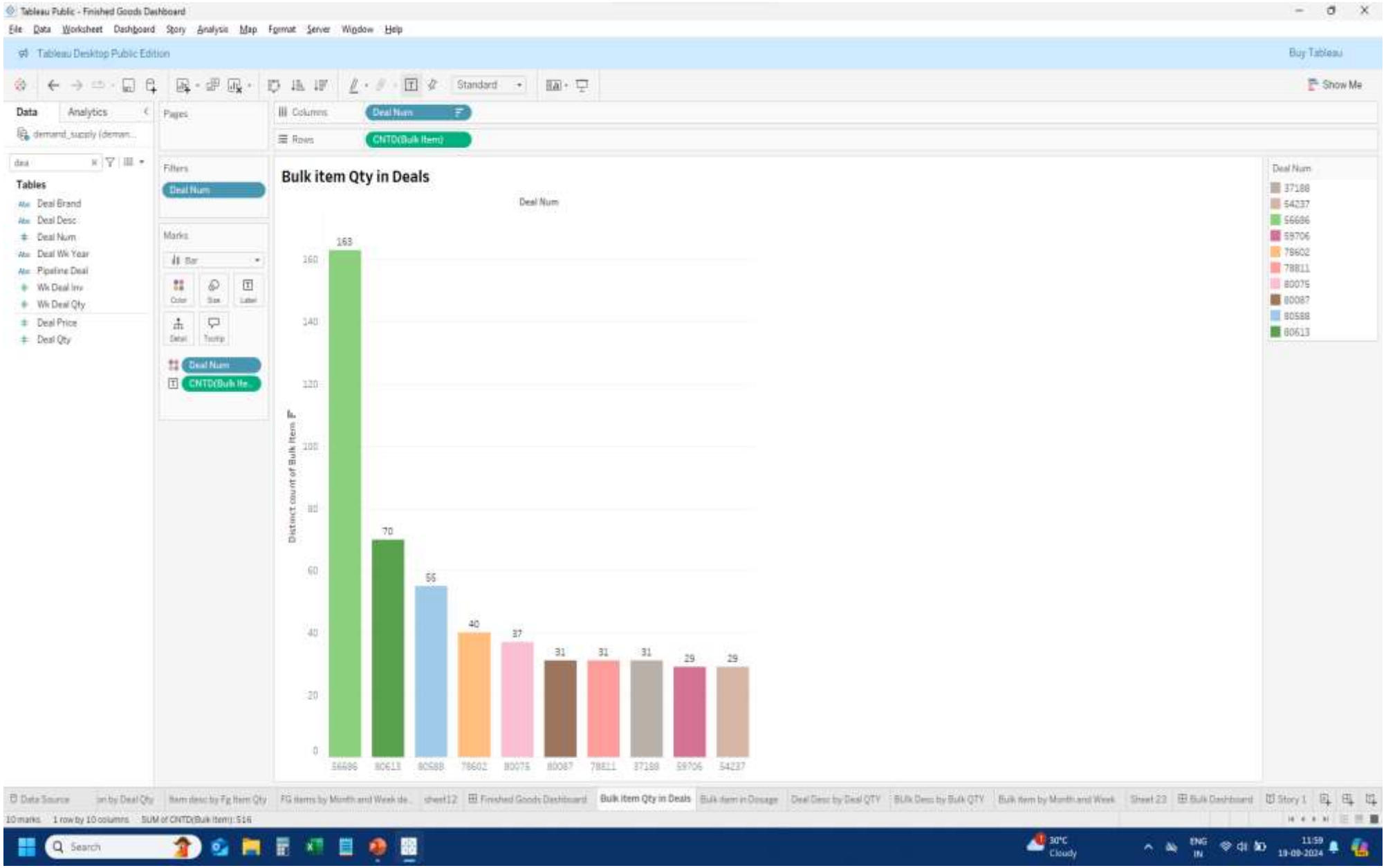
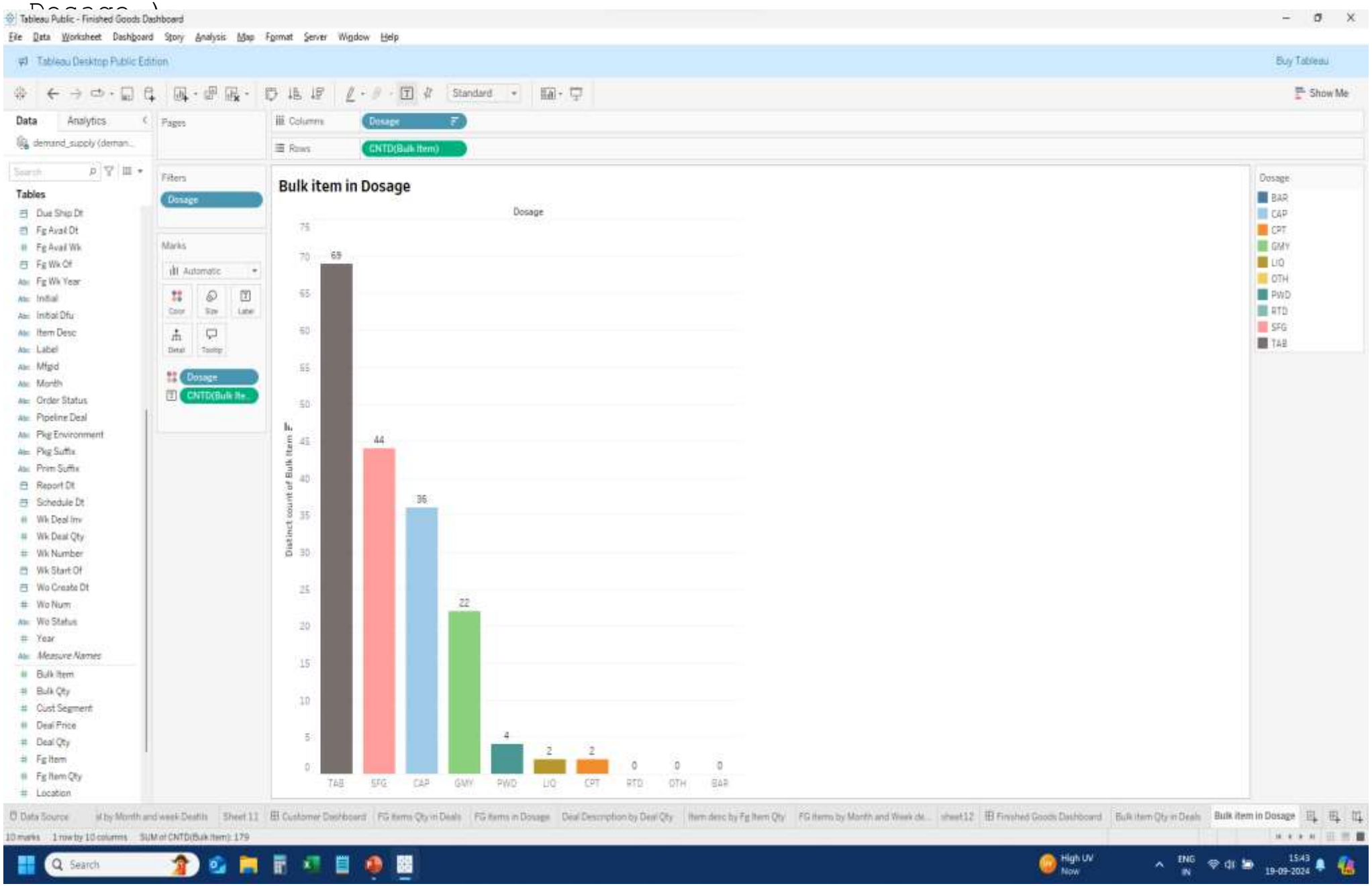
Bulk item Qty in Deals: show number of deal in bar chart which are all Bulk item(using Bulk item Qty and Deal Num) .



Steps to follow:

1. Drag 'Bulk item Qty ' into row >> right click on it and select measure >> count(distinct)
2. Drag 'Deal Num' into column and sort descending
3. Drag 'Deal Num' to color cart
4. Drag 'Bulk item Qty ' into label cart >> right click on it and select measure >> count(distinct)
5. Drag 'Deal Num' to filter >> right click on it >> select edit filter >> select Top and then select by field Top 10

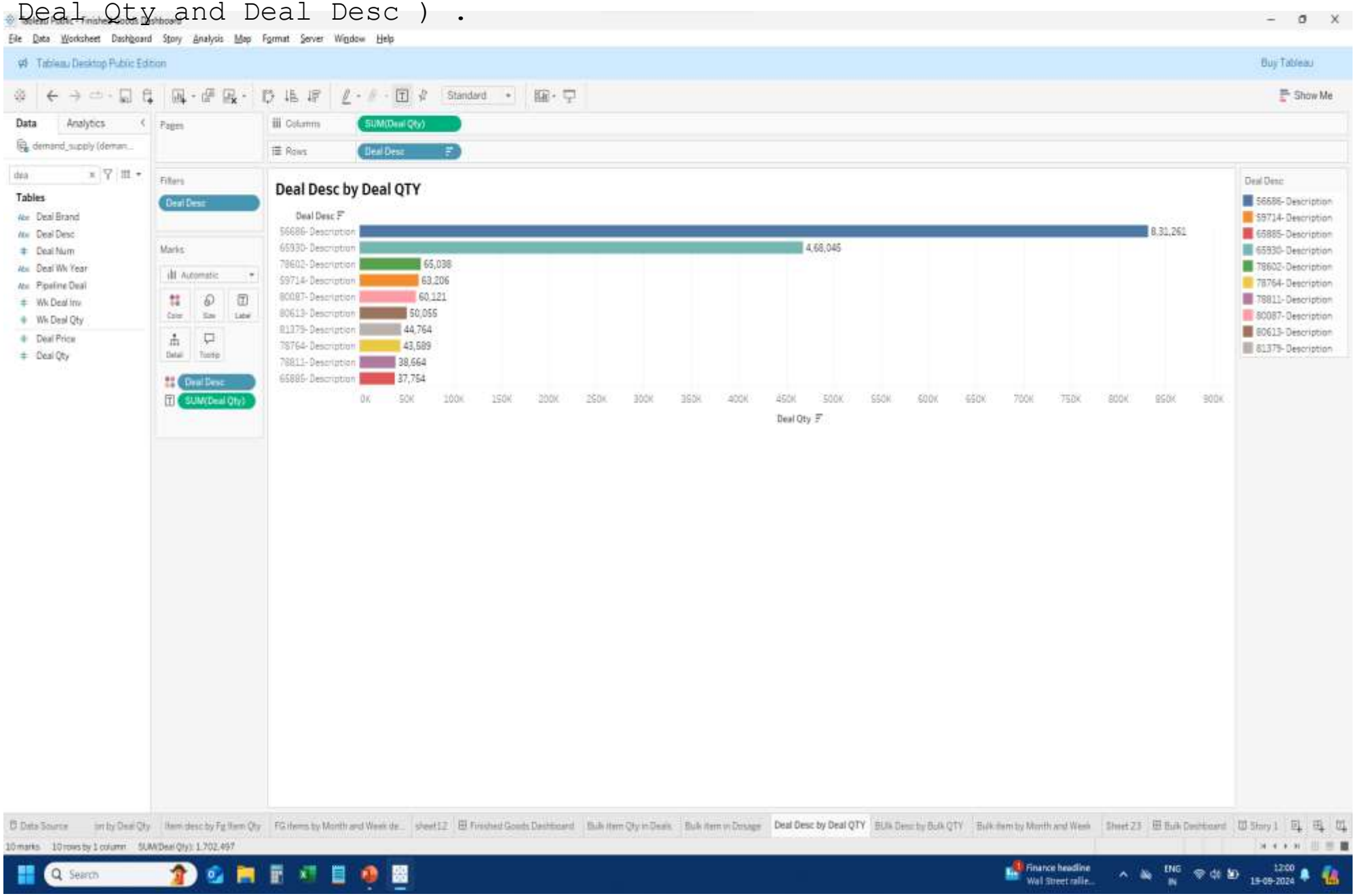
Bulk item in Dosage: Show Dosage in bar chart which are all Bulk item(using Bulk item and Dosage)



Steps to follow:

1. Drag 'Bulk item ' into row >> right click on it and select measure >> count(distinct)
2. Drag 'Dosage' into column and sort descending
3. Drag 'Dosage' to color cart
4. Drag 'Bulk item ' into label cart >> right click on it and select measure >> count(distinct)
5. Drag 'Dosage'

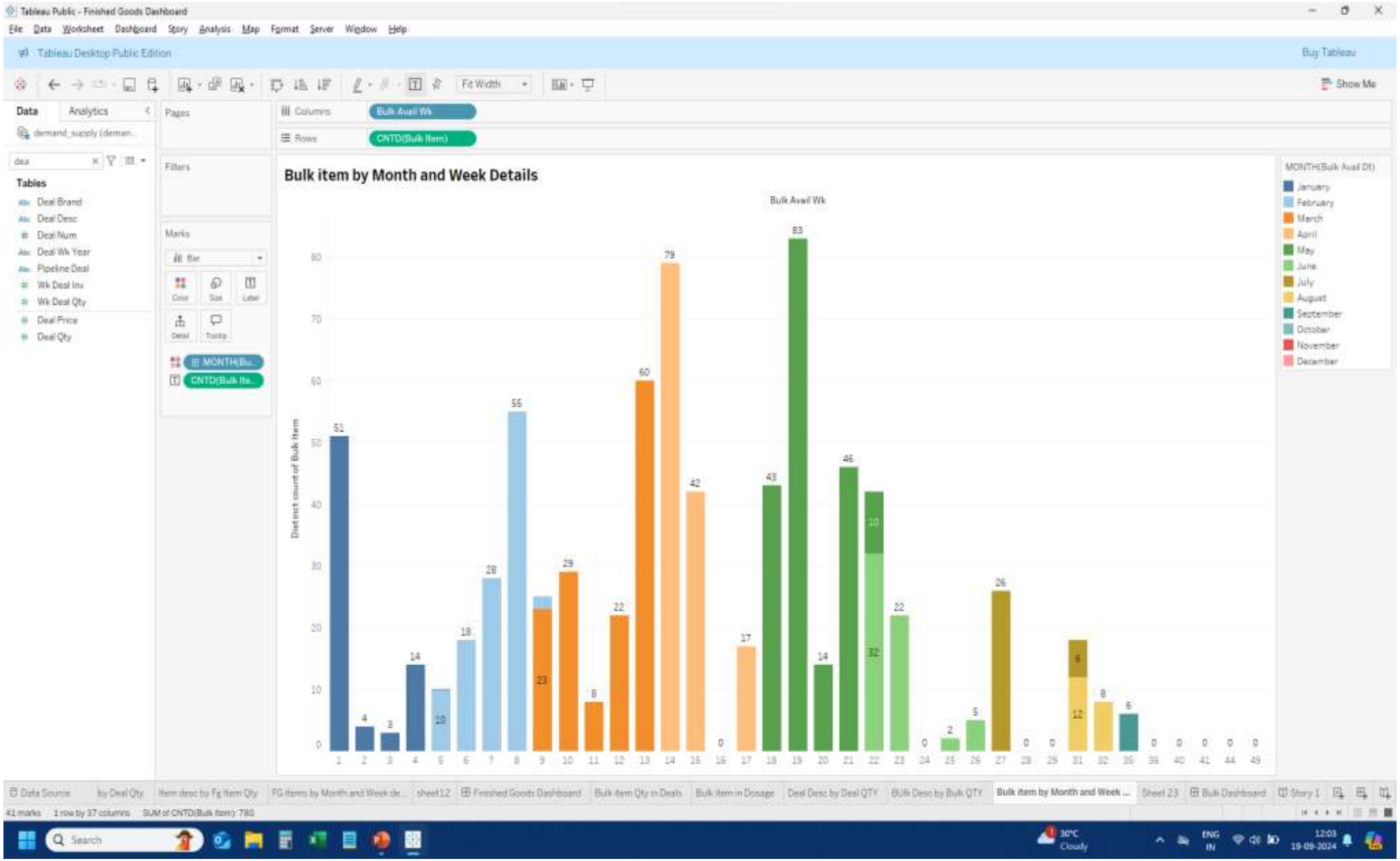
Deal desc by Deal Qty: Show Sum of deals quantity in bar chart which are all Deal desc(using Deal Qty and Deal Desc) .



Steps to follow:

1. Drag ' Deal Qty ' into column >> right click on it and select measure >> sum
2. Drag 'Deal Desc' into row
3. Drag 'Deal Desc' to color cart
4. Drag ' Deal qty ' into label cart >> right click on it and select measure >> sum
5. Drag 'Deal Desc' to filter >>

Bulk item by Month and Week details: Show Bulk items available by week and Month in bar chart which are Bulk Avail wk and month(using Bulk Avail Wk and Bulk item) .



Steps to follow:

1. Drag ‘Bulk Avail Wk ‘ into column
2. Drag ‘Bulk item’ into row >> right click on it and select measure >> count(distinct)
3. Drag ‘ Bulk Avail DT’ into color cart >> right click on it and select Month
4. Drag ‘Bulk item’ into label cart >> right click on it and select measure >> count(distinct)

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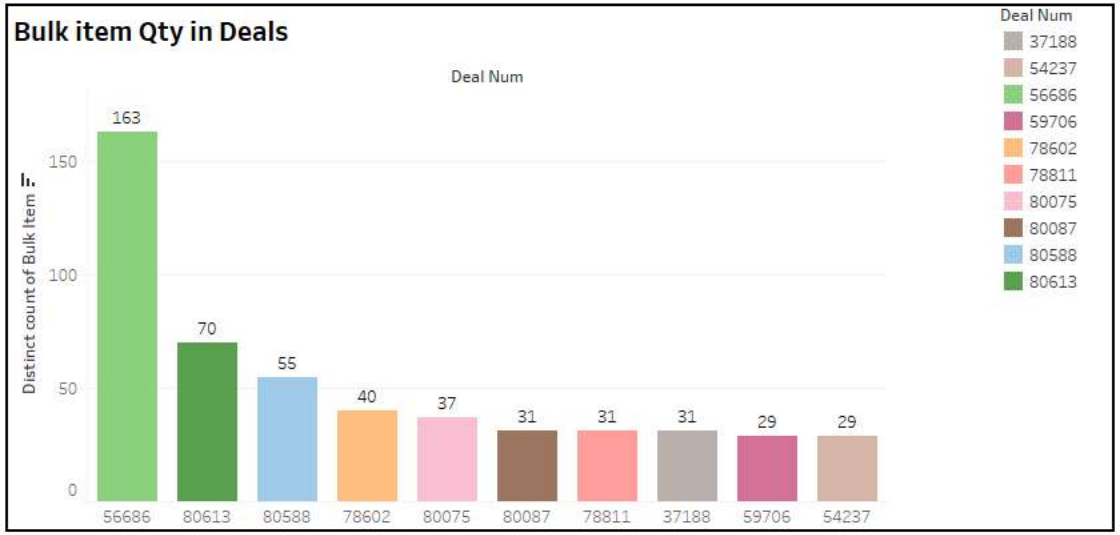
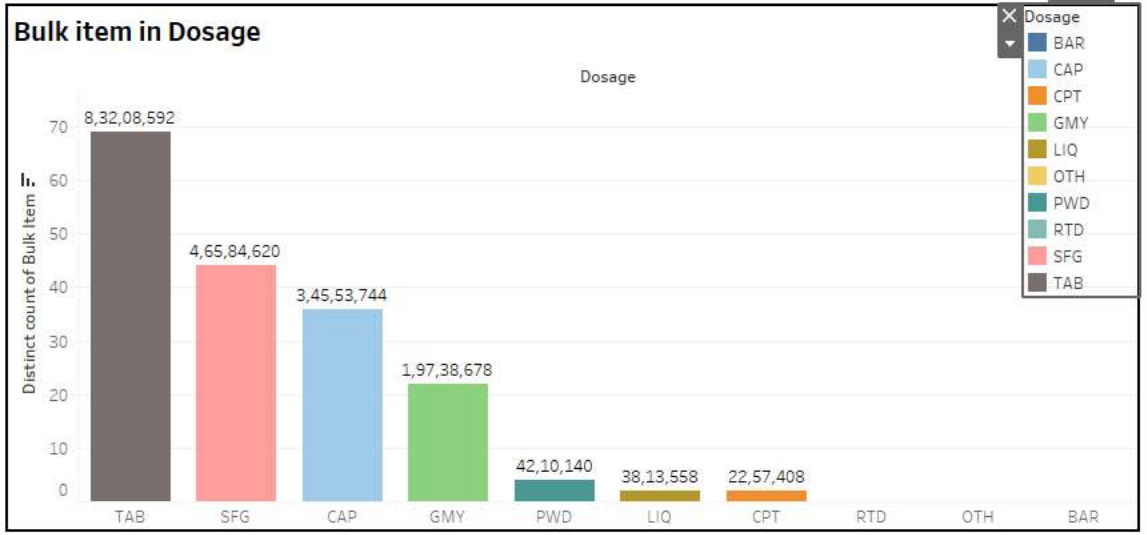
Bulk Dashboard

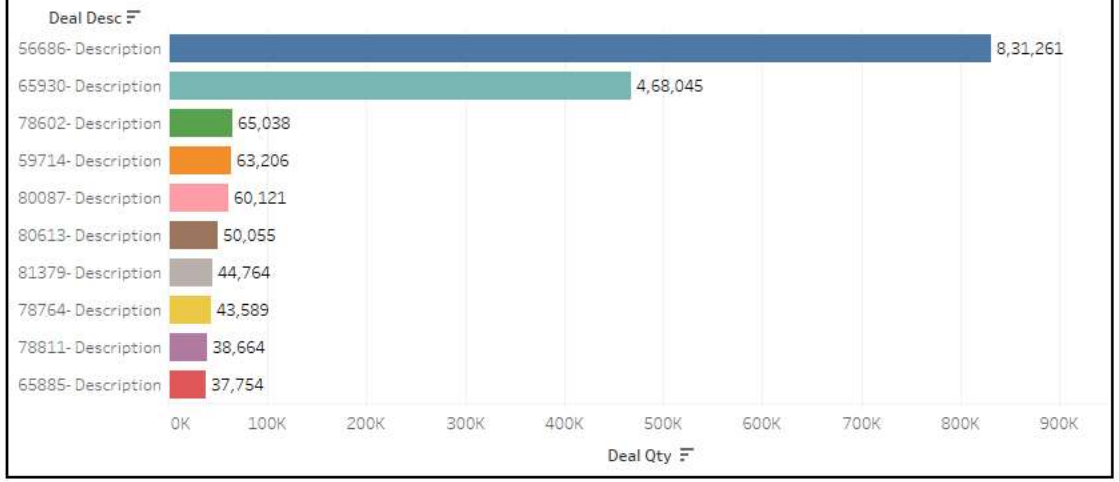
Bulk item Qty in Deals



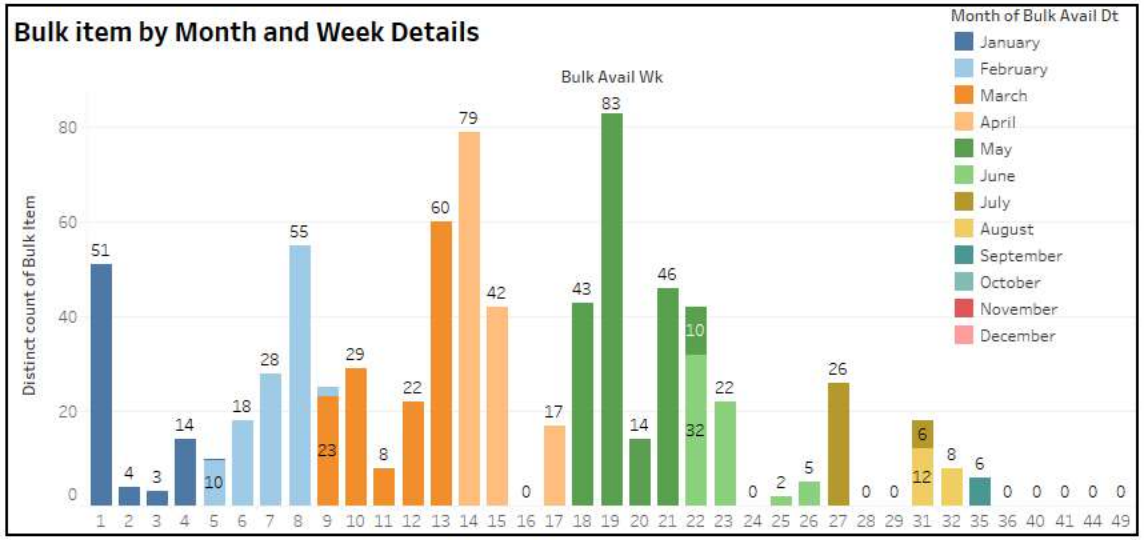
Bulk item in Dosage



Deal Desc by Deal QTY



Bulk item by Month and Week Details



Data Source | by Deal Qty | Item desc by Fg Item Qty | FG items by Month and Week de... | sheet12 | Finished Goods Dashboard | Bulk item Qty in Deals | Bulk item in Dosage | Deal Desc by Deal QTY | BUlk Desc by Bulk QTY | Bulk item by Month and Week D... | Sheet 23 | Bulk Dashboard | Story 1

10 marks 1 row by 10 columns SUM of CNTD(Bulk Item): 179

Search

Nifty midcap -2.29%

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12:04 19-09-2024