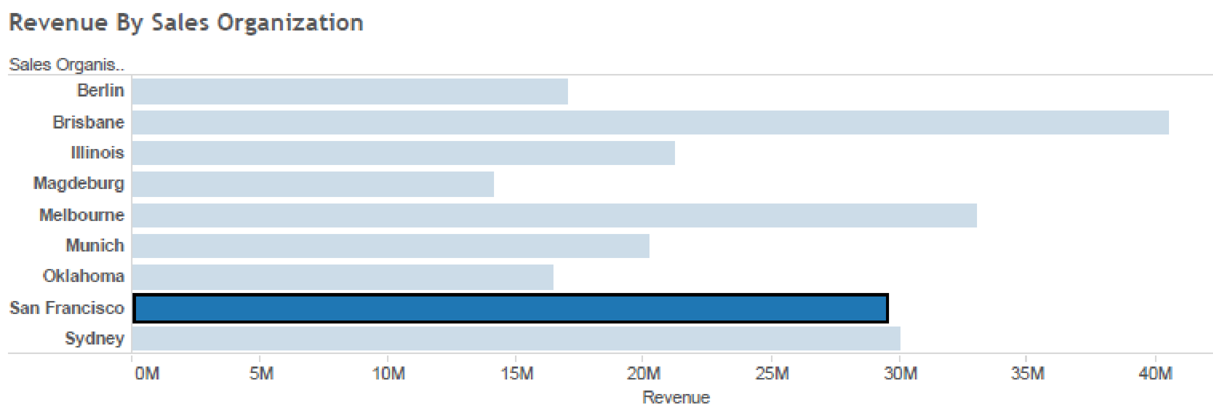
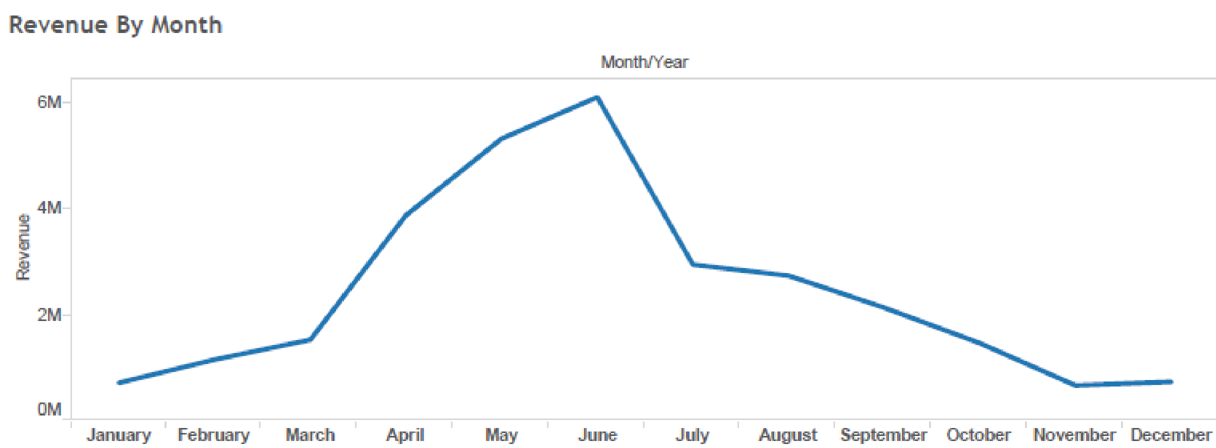
Case Study: Small Dashboard Development
Using Tableau

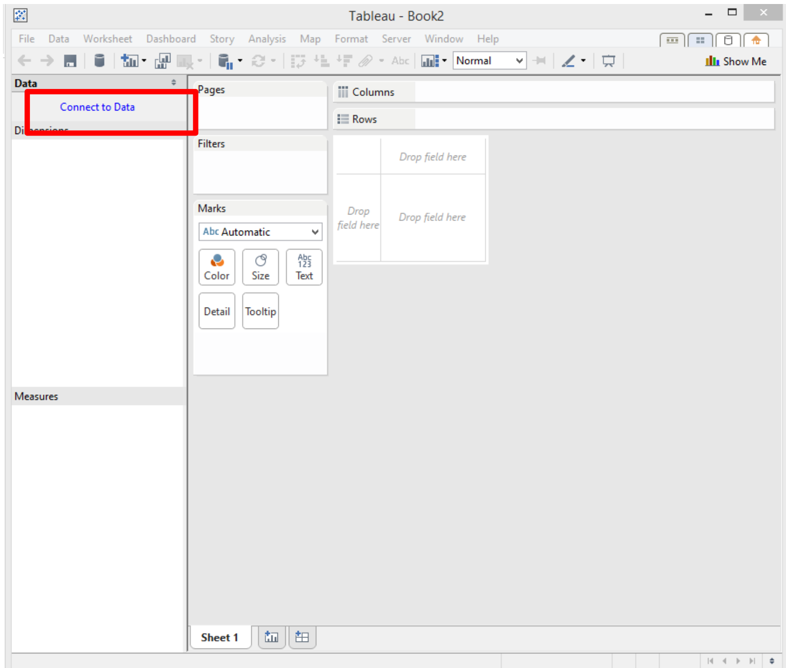
Note: This case study is designed to work with the Excel file titled ***GBI_Small_Dataset.xls***. **Please save the Excel file to your Desktop**. In this case study, you will create a dashboard with two charts, like the ones shown below:



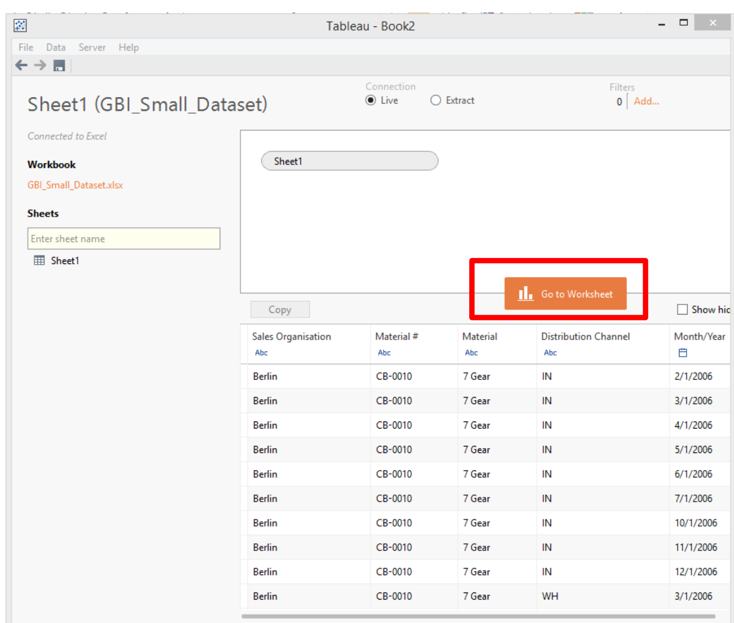


1. Find Tableau through the Start Menu (or type in Tableau on your Start Page) and run it**.** When you open Tableau in the lab, you may be prompted to select a trial or register the product. Please select Trial. The interface should appear as shown below.

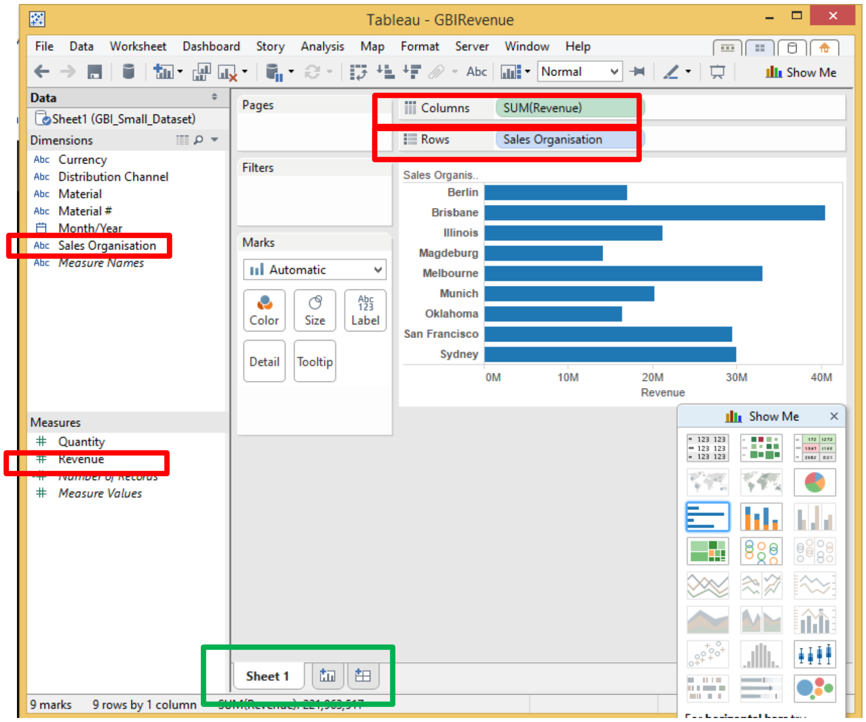
2. Select File | New, and the following blank workbook should appear. Select **Connect to Data** (in blue font in the top left corner of the screen). A new screen will appear - select Microsoft Excel (left frame), and find the GBI_Small_DataSet.xls on your desktop.



3. The dataset window below should appear. Now, click on "Go to Worksheet" (the orange button shown below) and you'll return to the Workbook view.

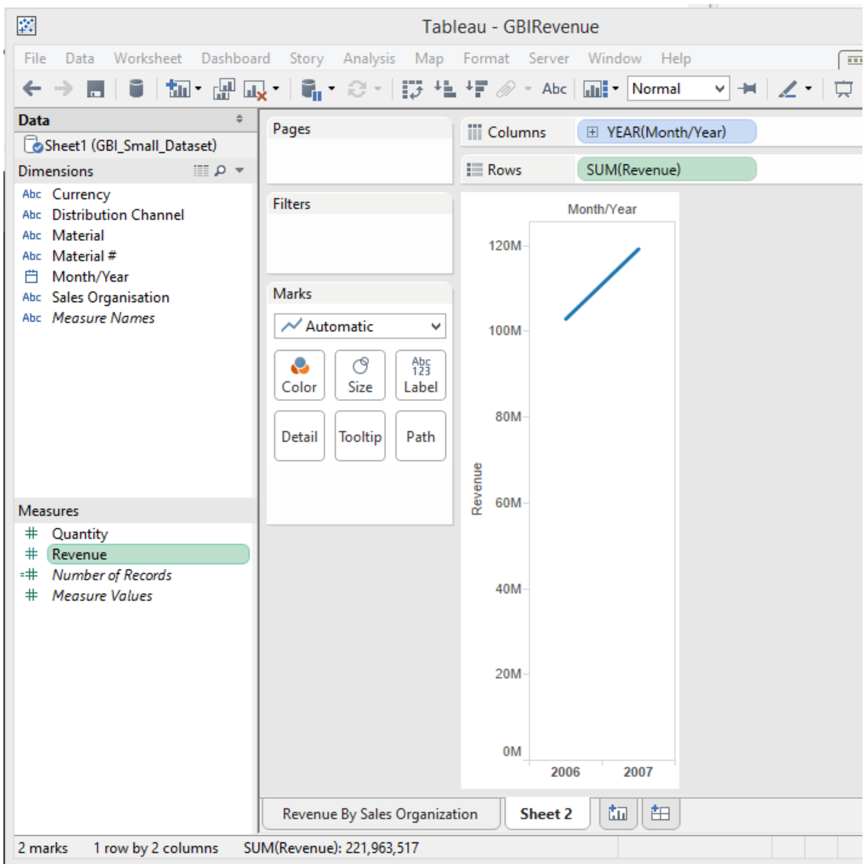


4. First, save your workbook by selecting File | Save As, then specify GBIRevenue as the name. Create your first graphic (worksheet) on Sheet 1, by dragging Sales Organization (a Dimension) to the Rows area. Then drag Revenue (a Measure) to the Columns area. A horizontal bar chart should appear.

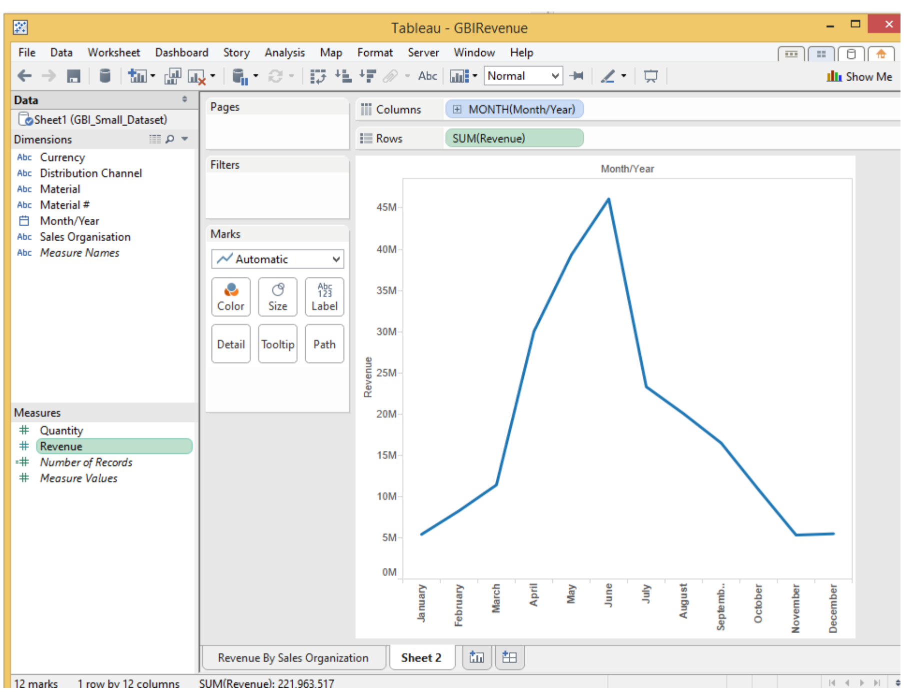


5. Rename your graphic (worksheet) by double-clicking on the Sheet 1 tab, and type in the name Revenue By Sales Organization.

6. Next, create a new graphic (worksheet), by clicking on the New Sheet icon/tab at the bottom of the interface. On Sheet 2, drag Month/Year to the Columns area, and drag Revenue to the Rows area. The following line chart should appear.

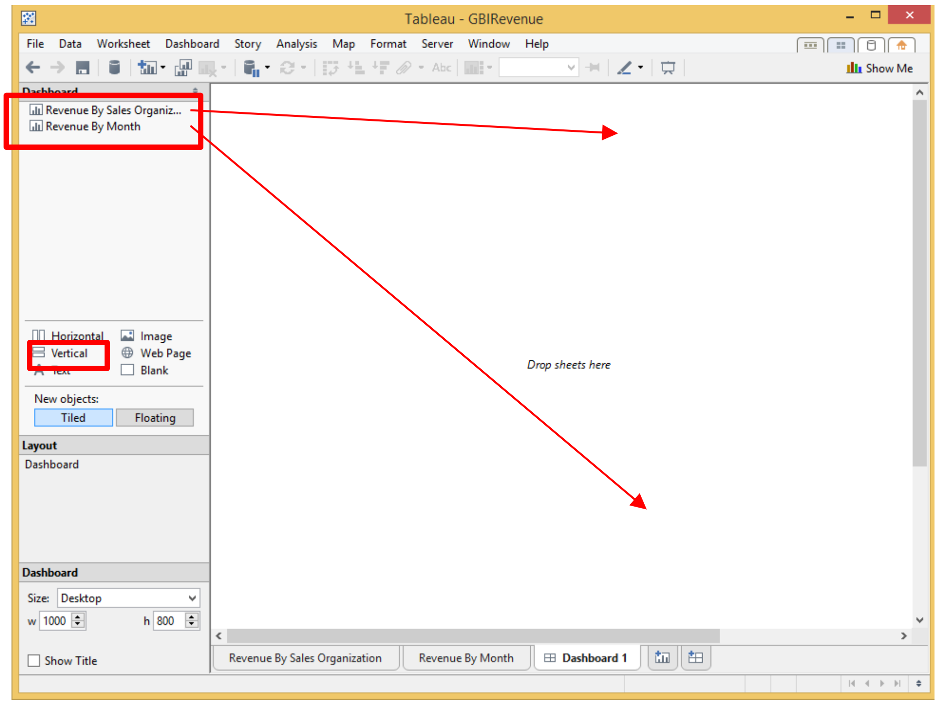


7. We want to view Revenue by Month, so you need to modify the Year (Month/Year) dimension. Click on the drop down arrow on the right of the Year (Month/Year) dimension in the Columns area. Select month. The line graph should change as shown below.

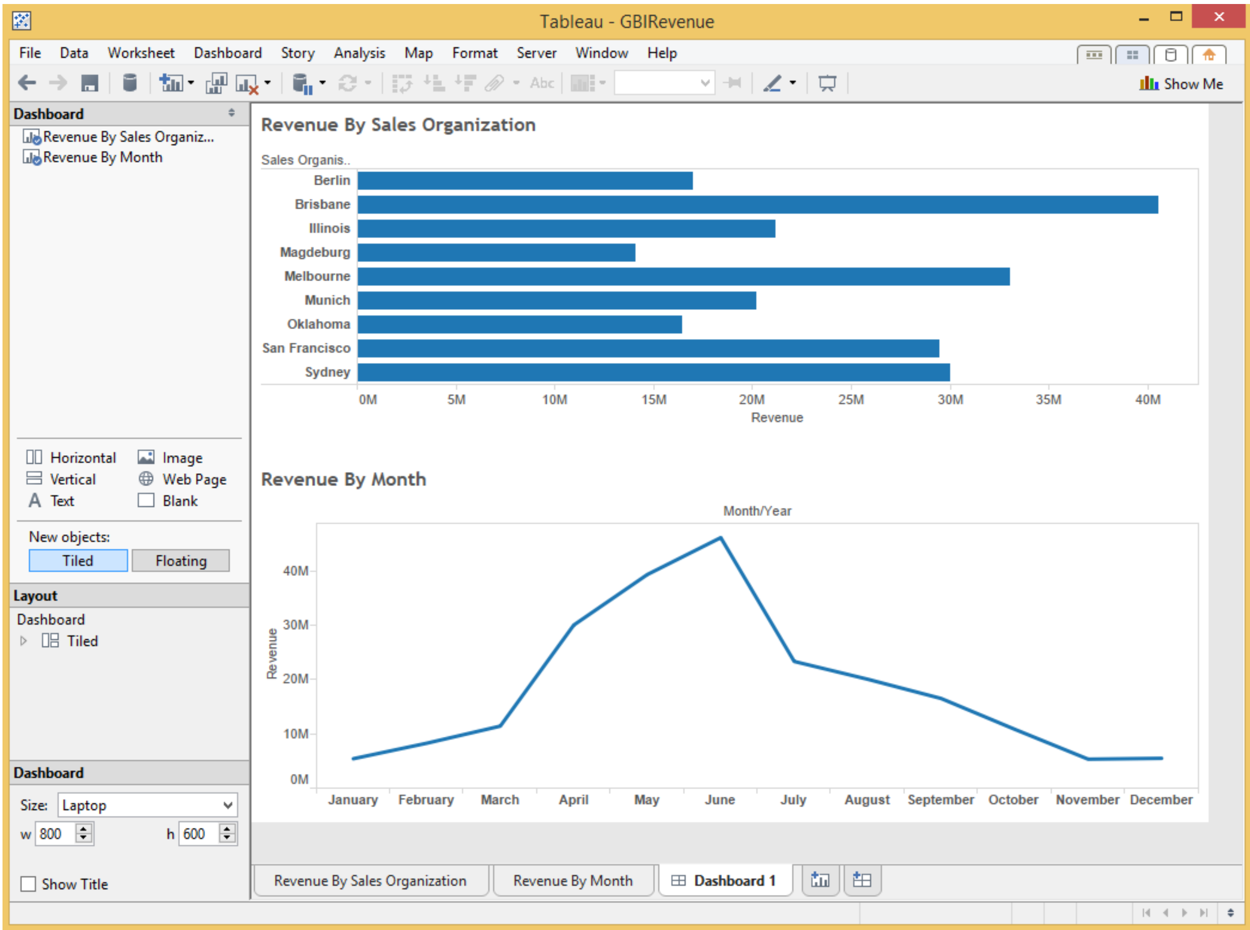


8. Rename this new worksheet, Revenue By Month. Save the workbook – File | Save.

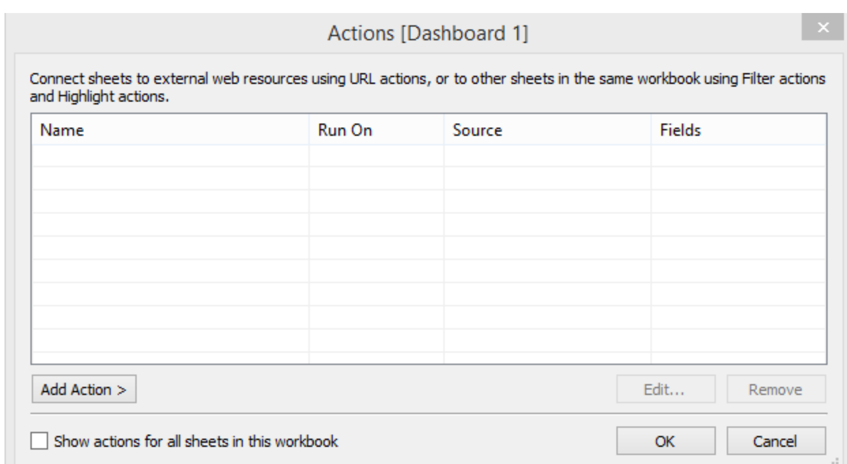
9. Now create a dashboard, by selecting Dashboard | New Dashboard. Your interface should appear as below. Before adding any graphics to your dashboard, click on the Vertical layout shown below.



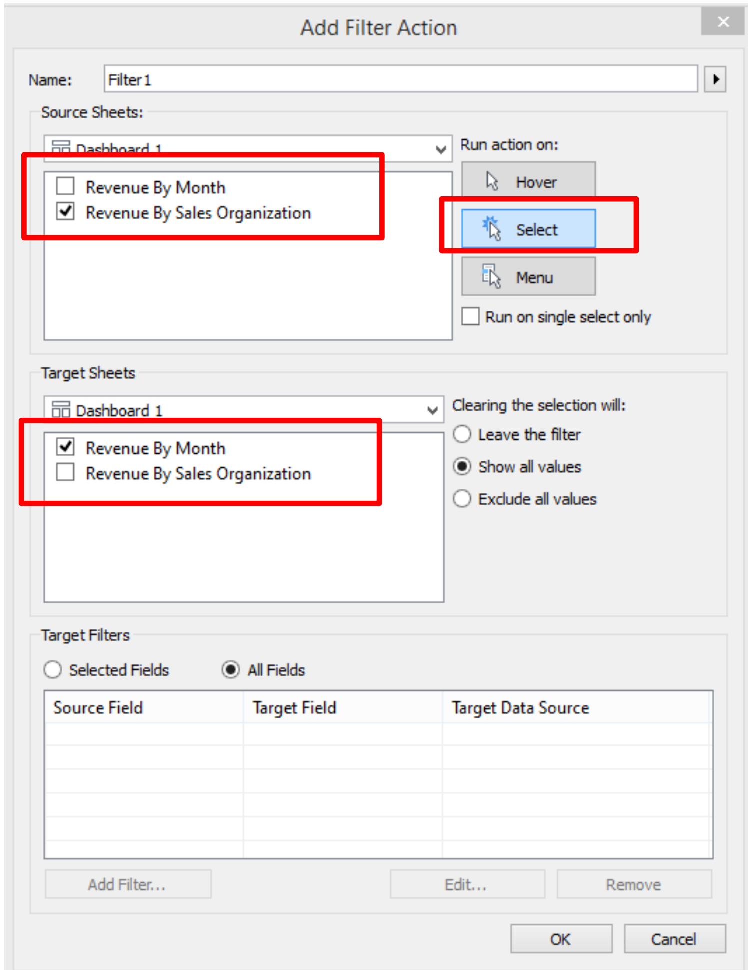
10. Next, drag the Revenue By Sales Organization chart from the left panel into the top area of dashboard. Then, drag the LineChart into the bottom area of the dashboard. Your dashboard should appear as below.



11. Last, create interactivity in your dashboard such that when the user clicks on a single Sales Organization in the bar chart, this selection will act as a filter in the line chart. Select Dashboard | Actions. The screen below will appear.



12. Select Add Action | Filter. The screen below will appear. In the Source Sheets section, unselect Revenue By Month. In the Target Sheets section, unselect Revenue By Sales Organization. Then, select "Select" for "Run Action On:" Click OK. Then click OK again.



13. Now, when you click on a bar within the Revenue By Sales Organization bar chart, the selection will act as a filter, and the line chart will only display revenue for that Sales Organization.

14. Now, create a PDF document of your Dashboard and two charts. Select File | Print to PDF. In the dialog box shown below, make sure that 'Entire Workbook' is selected and click OK. Submit your PDF document on BBLearn.