**Tableau Exercise**

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**Tableau Desktop –** *Follow the instructions below to setup your machine*

1) Navigate to the following web page in your browser: <http://www.tableausoftware.com/tft/activation>

2) Select the “Get Started” button. When prompted, enter your UTD email address in the “Business e-mail” field. Enter UT Dallas in the “Organization” field.

3) When prompted, enter the following product key: **TDI6-E194-5000-4C9B-25E7**

4) Download the exercise document and excel file in e-learning for your exercise.

**About this Data**

The data set is from the World Bank, collected as part of a pilot study on the feasibility of crowd-sourced price data collection. Price data was collected by non-professionals for thirty specific food items across several months in eight countries. The Excel file contains geographic data (city and country), time data (date of observation), product information (name, quantity) and price (standardized quantities, prices converted to comparable currency).

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| **Connect to Data -** *Connect to an Excel file and join two tables* |
| |  | | --- | | **1) Steps to join the content from two tables-*Observations* and *Products*** |   1) Open Tableau Desktop 8.2  2) Click “Connect to Data”  3) Click Microsoft Excel  4) Navigate to the file on your machine (desktop) and open it  5) Click and drag out the sheet named *Observations*  6) View the data in the preview pane below  7) Drag out the sheet named *Products*  8) Verify the Join  a. Click on the join icon  b. Make sure the correct fields are being used in the join clause (**Product Code**)  **Paste the screenshot-------------------------**    9) Click “Go to Worksheet”  **Overview of Tableau Basics and Concepts**  • Fields are broken up into Dimensions and Measures.  o **Dimensions** (blue) are categorical fields. They are the labels in a visualization, the buckets that data falls into such as locations, product names, etc.  o **Measures** (green) are quantitative fields. They are the axes in a visualization, the numbers that can be analyzed, such as price and counts of records.  • Tableau creates some fields that can be used in a visualization that do not exist in the original data set.  o If the data set contains geographic fields, such as country or city, Tableau searches an internal database and generates **Latitude** and **Longitude** fields. This enables the geographic data to be plotted on a map  o **Number of Records** is a simple count of rows in the data set  • **Show Me** can be accessed in the upper right corner of the screen. With field(s) selected, Show Me offers one-click options for chart types  • The Tableau canvas  o Data window – purple – drag fields from here to bring them into the view  o Shelves – blue – areas where fields can be placed to control exactly how they appear in the view  o Canvas – green – where the visualization is built. Fields can be placed directly here as well as on shelves  o Toolbar and ribbon – orange – additional controls and menu options, including Undo and Clear Sheet |

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| **2) Plot countries as a map**  1) Clear the sheet  (in the ribbon) or create a new sheet (at the bottom)  2) Drag **Country** from the data window to the canvas  a. If you get anything other than a map, undo and try dropping the field **Country** into the large, bottom right rectangle that says “Drop field here”. Alternatively, double click on the field name to bring **Country** out as a map  b. Note that the generated Latitude and Longitude were automatically plotted on the Rows and Columns shelves  **Paste the Screenshot-----------------------------------**    **3) To analyze Which country has the most expensive average price.**  1) Drag **Price** from Measures to the Color shelf (button)  a. This should create a filled map colored on a gradient of “SUM(Price)”  **3a) What is the default aggregation for measures?**   * **SUM**   2) Right click on the pill on the Marks Card that says “SUM(Price)”  a. Click on the option “Measure(Sum)”  b. Click on “Average” to change the aggregation from Sum to Average  **Paste the Screenshot--------------------**    **3b) Which country has the highest average price?** (Hint: Hover over the darkest green country )   * **Nigeria (3.034)**   **4) Make a filled map of countries**  1) Clear the sheet  2) Double click on **Country** to plot the map  3) Drag **Country** from the data window to the color shelf  4) Select the dropdown on the Marks card and change from “Automatic” to “Filled Map”  5) Right click on the sheet tab and Rename the sheet “Countries” and create a new sheet  **Paste the screenshot-----------------**      **5) To analyze how much variation is there in product prices across each country**  Steps:  1) Click on New Sheet.  2) Holding down the Control key (Command on a Mac) click to select the fields: **Product Name**, **Price**  3) With those two fields selected, click on the Show Me tab  4) Select the Horizontal Bar Chart and click the Show Me tab again to close it  5) Right click on the “SUM(**Price**)” pill on the Columns shelf  a. Click on the option “Measure(Sum)”  b. Click on “Median” to change the aggregation from Sum to Median  6) Hover over the words “Median Price” on the X axis until the Sort icon appears. Click the icon to sort  7) Drag **Country** from the Rows shelf to the Columns shelf in front of **Price**.  8) Drag a new copy of **Country** from Dimensions to the Color shelf  9) Right click on the sheet tab and rename the sheet “Price Variation by Country”  **Paste the Screenshot--------------------**    **5a) From the pattern, what insight do you get? Which country has higher prices than other countries?**   * **From the above pattern we can see the median price of the different commodities in different countries. For most of the countries it is around 6.So, we can say that in average the median price of commodities in different countries is around 6.** * **Nigeria is having the higher price than other countries.**   **6) Story**  Create a Story using the visualizations created above to tell the story of the data. Stories can have captions, floating descriptions, and are fully interactive. Filter selections can be saved (updated) or duplicated as new points.  **Detailed Steps:**  **I. Create a story and add a point with description**  1) Click “Story” in the ribbon and select “New Story”  2) If necessary, use the sizing menu in the bottom left corner to adjust the size of the story to fit your screen (laptop or automatic)  3) Click and drag out **Countries** (Map)  4) Click in the navigator box to add a caption for the map  a. “Data was collected from 8 countries around the world”  5) Click and drag out the Description option from the left pane to add a comment about the map  a. “Prices for specific food items were recorded for several months via crowd sourced data collection”  **Paste the Screenshot-------------------------**    **II. Add another point and modify the visualization**  Click on "New Blank Point"  6) Double click **Price Variation by Country**  7) Click in the navigator box to add a caption  a. “Prices of the food products varied between countries”  8) Go back to the sheet for **Price Variation by Country**  9) In the ribbon, use the drop down to change the fit from “Normal” to “Entire View”  a. If you want to maximize screen real estate, you can remove the color legend. Click on the caret on the Countries color legend and select “Hide Card”  10) Click back on the story to verify there are no longer scroll bars on the story  a. Note: most changes to a visualization must be made on the underlying sheet, not in the Story  It appears like the following screen:    **III. Showcase interactivity and saving a specific state of a visualization**  11) On the current point (“Prices of the food products varied between countries”),  a. Hold down the control key (command key on a Mac) and click on several bars that don’t seem to fit the overall trends  12) Click the button “Save as a New Point”  a. This duplicates the point – the visualization is the same but with those selections still highlighted  b. If you want to change which bars you’ve selected, you can select other bars and click “Update” above the navigator box to save those modifications  13) Click in the navigator box to add a caption  a. “Which products were more expensive varied by country”    **7) Dashboards and Stories**  Detailed Steps:  Are there price fluctuations or have prices held fairly steady?  1) Create a new sheet  2) Drag **Obs Date** to the Columns shelf  3) Right click on the pill and select the option “Week Number”  4) Drag **Price** to the Rows shelf  5) Right click on the “SUM(**Price**)” pill on the Rows shelf  a. Click on the option “Measure(Sum)”  b. Click on “Average” to change the aggregation from Sum to Average  6) Drag **Country** to Color  7) Right click on **Country** anywhere you see it and select “Show Quick Filter”  a. If desired, click on the caret in the upper right corner of the filter to bring up the menu and select “Multiple Value (Dropdown)”  8) Drag **Product Name** to Detail  9) Right click on **Product Name** anywhere you see it and select “Show Quick Filter”  a. Click on the caret in the upper right corner of the filter to bring up the menu and select “Single Value (Dropdown)”  10) Right click on the sheet tab and rename the sheet “Timeline of Price Fluctuation”  **Paste the screenshot------------------------------**    ***7a) Are there price fluctuations or have prices held fairly steady?***   * **Yes, there are price fluctuations.**   **8) Creating Dashboard**  Steps:  1) Create a blank dashboard by clicking on the tab at the bottom  2) Drag out **Countries**  3) Drag out **Timeline of Price Fluctuation** to the bottom  4) Click on the map to bring up its border  a. At the top right corner, click the caret to bring up the menu  b. Select “Use as Filter” to set the map as a filter for the timeline  5) Right click on the title “Countries” above the map and chose “Hide title”  6) Click on the name of the Product Name quick filter to bring up the border  a. At the right top corner, click the caret to bring up the menu  b. Choose “Single Value (List)  c. If desired, close the Country color legend by clicking to bring up the border and clicking the X  7) Double click on the tab to rename the sheet **Price Fluctuation**  **Paste the Screenshot-----------**    **9) Back on the Story**  IV. Add another point and finish the story  14) Double click **Price Fluctuation** to bring it out to the story  15) If the dashboard doesn’t fit well:  a. Go back to the sheet for the dashboard  b. At the bottom left corner, open the Size flyout menu  c. Select “Fit to Story 1”  d. Go back to the story  16) Click in the navigator box to add a caption  a. “Explore the dashboard to see how prices changed over time”  17) Click and drag out the Description to add a caption  a. “Click on a country to see just the records for that country”  b. “Click on a product (or “All”) to change the timeline”    18) Double click “Story Title” to add a title to the story  a. “Variation of Food Prices”  **10) Submit your Tableau analysis file and your answer file in MSWord for assignment credit.** |