Long Term Virtual Internship

Data Analytics using Tableau

Assignment – 02

Pre-Requisites:Open Tableau Student → Connect Excel "super market.csv"

1. **Prepare Donut Chart:**

   Step – 01: Create a New Sheet and Renamed as "Donut Chart"

   Step – 02: Drag Product line-columns select only one

   Step – 03: Click Marks card -Select Pie from dropdown- Drag

   - Product line → Colour
   - Total → Angle
   - Total → Label

   Step – 04: Create → Calculated Field Name it: Donut Enter formula: 0 Click OK

   Step – 05: Drag Donut → Rows (twice) (So Donut appears two times in Rows)

   - Right-click on second Donut → Select Dual Axis
   - Right-click again → Synchronize Axis

   Step – 06: Format Inner Circle (Hole) First Marks Card (Outer Pie) On
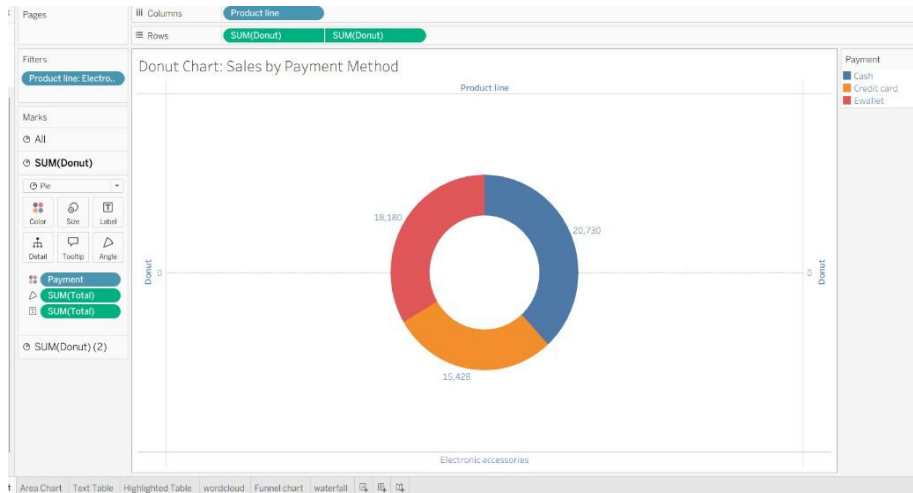
   Marks(Donut) - First one:

   - Type = Pie
   - Product line → Colour
   - Total → Angle
   - Total → Label
   - Increase Size

   On Second Marks Card (Inner Circle) - Click Second Marks (Donut) Set:

   - Type = Pie
   - Remove all fields
   - Drag Donut → Angle
   - Colour → White (or background colour)
   - Reduce Size

Step – 07: Drag payment to colours

2. Prepare Area Chart:

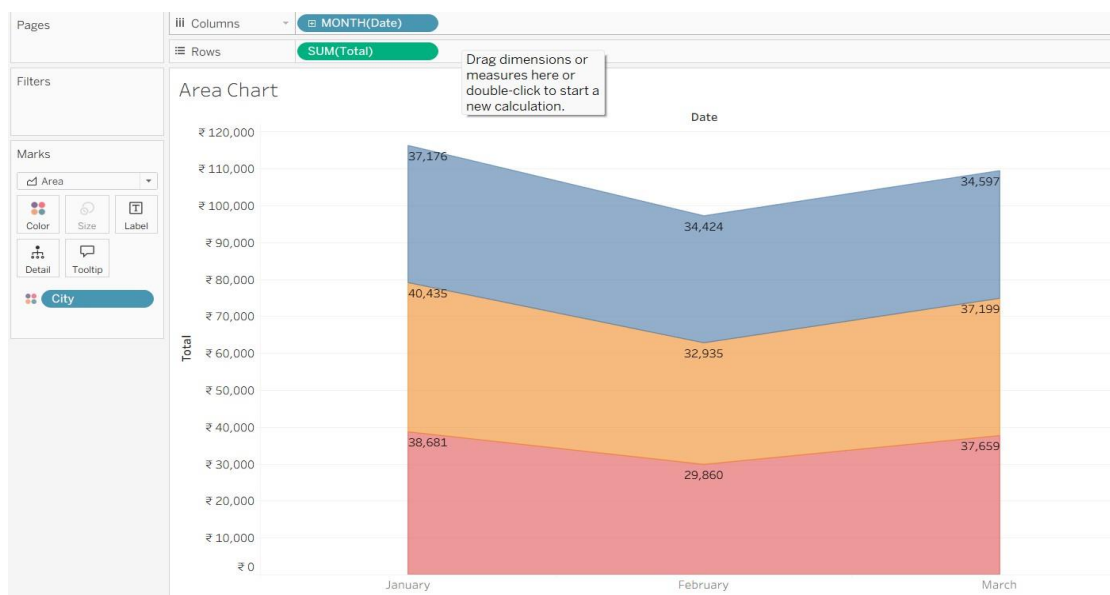Step – 01: Create a New Sheet and Renamed as "Area Chart"

Step – 02:   Drag Date → Columns shelf - Click the drop-down on Date- Select Month

　　　　　　(Continuous)

Step-03: Drag Total → Rows shelf

Step-04:   Click Show Me (top right) Select Area Chart

Step-05: Drag city → Colour (in Marks card)

Area Chart

3. Prepare Text Table:

Step – 01: Create a New Sheet and Renamed as "Text Table"

Step – 02: On the right side, find Show Me. Click the Text Table (Pivot Table) icon Step – 03: Drag

Date → Columns shelf

Step – 04: From the Data Pane (left side), drag these fields to Rows

- Invoice ID
- Branch
- City
- Customer type
- Gender
- Product line
- Date
- Time
- Payments

Step – 05: Drag Measures to Columns (or Text)

Step – 06: Now drag these Measures: To Columns:

- Unit price
- Quantity
- Tax
- Total
- COGS
- Gross income
- Gross margin percentage
- Rating

Step – 07: Set Marks Type to Text -On Marks Card, click the dropdown-Select
Text.

Text Table

4. Prepare Highlighted Table:

Step – 01: Create a New Sheet and Renamed as "Highlighted Table" Step – 02:

Drag Product line → Rows

Step – 03: Drag Branch → Columns

Step – 04: Drag Total → Marks → Colour On the Marks card, Click the drop-down → Select Square

Step – 05: In Marks card → Size Drag slider to the right until squares fill the cells. Step – 06: Drag

Total → Label -Click Label → Show Mark Labels

Step – 07: Click Colour → Edit Colours Choose a colour palette -Click Apply → OK

Highlighted Text

5. Prepare Word Cloud:

Step – 01: Create a New Sheet and Renamed as "Word Cloud" Step – 02: In

the Marks card -Click the dropdown-Select Text.

Step – 03: Drag Product line → Drop on Text Click Text → Increase font size Step – 04:

Drag Total → Drop on Size -Click Size → Increase slider

Step – 05: Drag Total → Drop on Colour

Word Cloud

6. Prepare Funnel Chart:

Step – 01: Create a New Sheet and Renamed as "Funnel Chart" Step –

02: On Marks Card-Select Bar
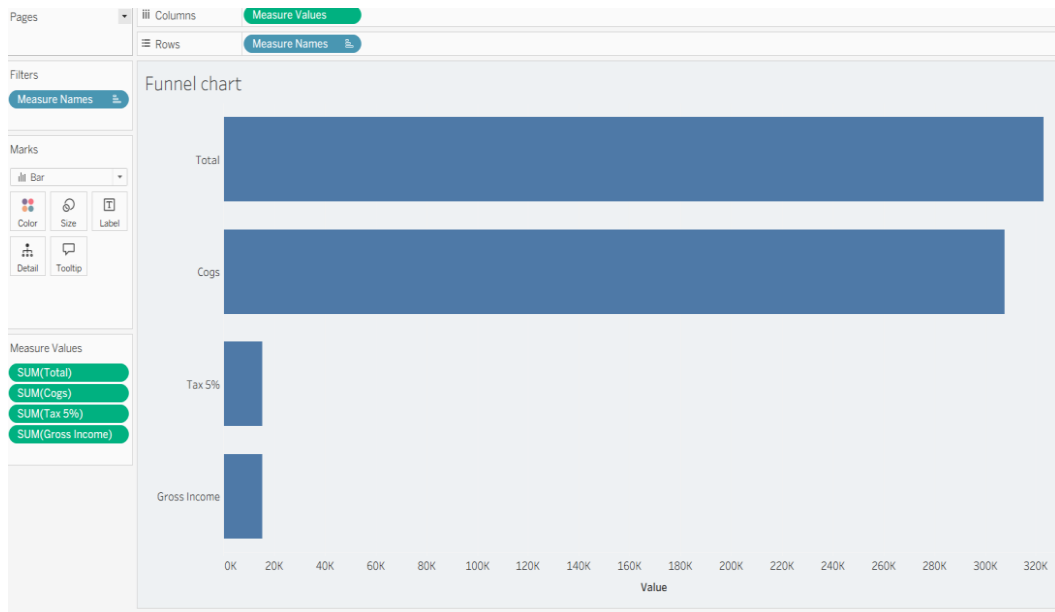
Step – 03: Drag Measure Values → Columns-Edit filters

    ✓ SUM(Total)
    ✓ SUM(cogs)
    ✓ SUM(Gross income)
    ✓ SUM(Tax)

Step – 04: Drag Measure Names→ Rows-It automatically shows in filter

    Click Sort → Descending (largest to smallest)

Step – 05: Right click on sheet - click on Format -Go to Format Shading-click on worksheet -change colour.

Funnel Chart

7. Prepare Waterfall Chart:

Step – 01: Create a New Sheet and Renamed as "Waterfall Chart" Step –

02: Drag Product line → Columns-Select All
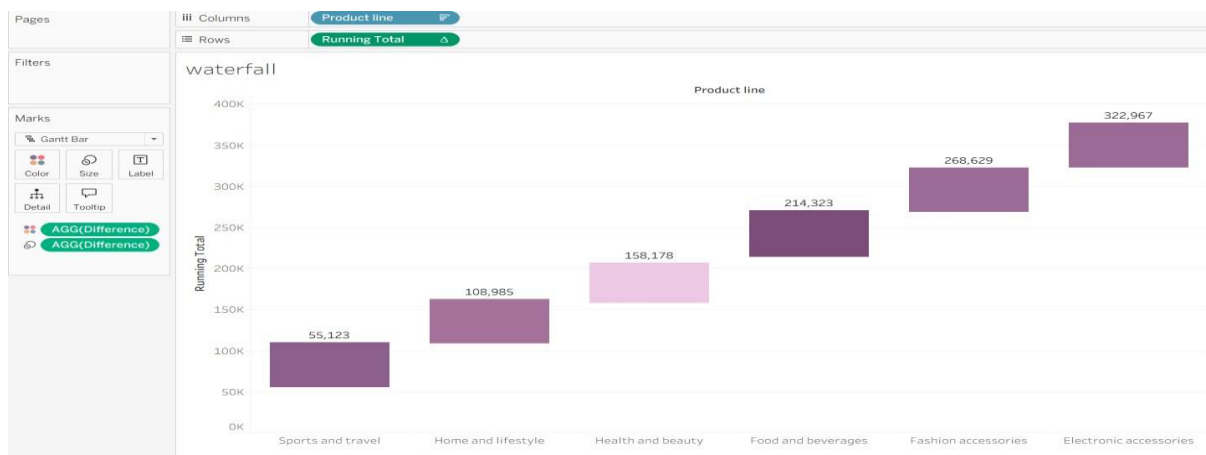
Step – 03: Drag Running Total→ Rows

Step – 04: Click Show Me-Select Gantt Bar

Step – 05: Right-click → Create Calculated Field Name: Difference

　　　　　Formula: SUM([Total])-Click OK

Step – 06: Drag Difference → Size (Marks card) Step – 07:

Drag Difference → Colour

Waterfall Chart