Module 9: Dashboards And Stories
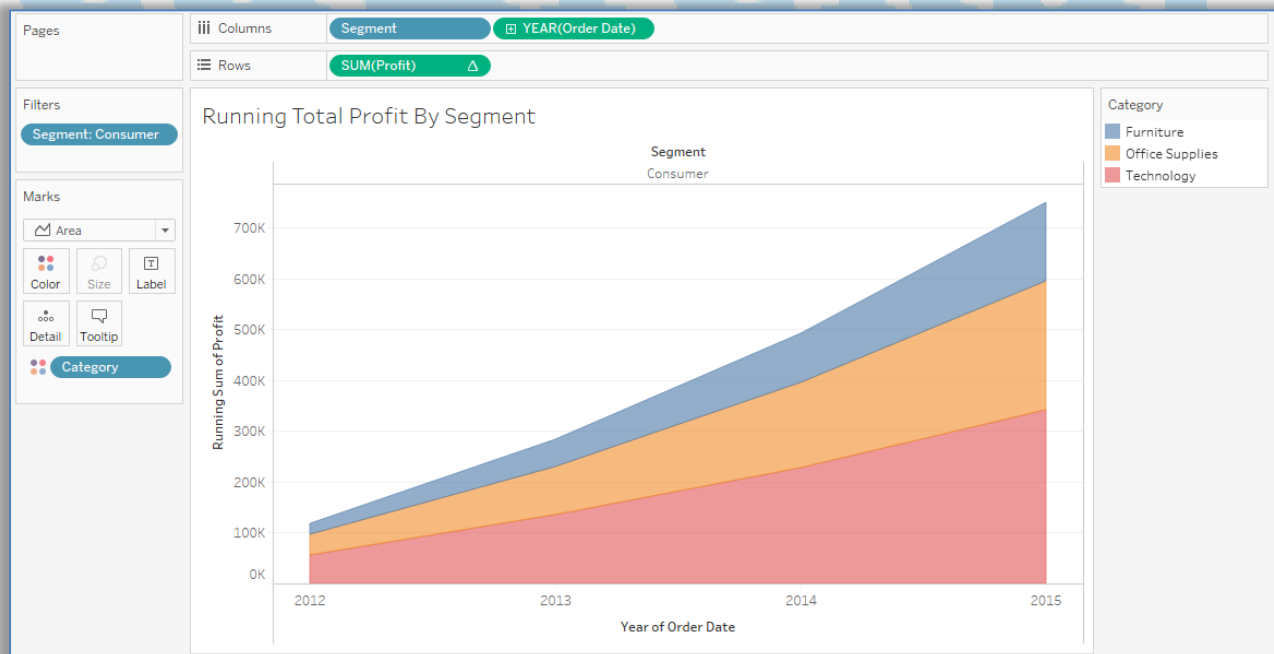
Demo Document I

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Demo I

In this demo, we are building a dashboard using Global Superstore Dataset.
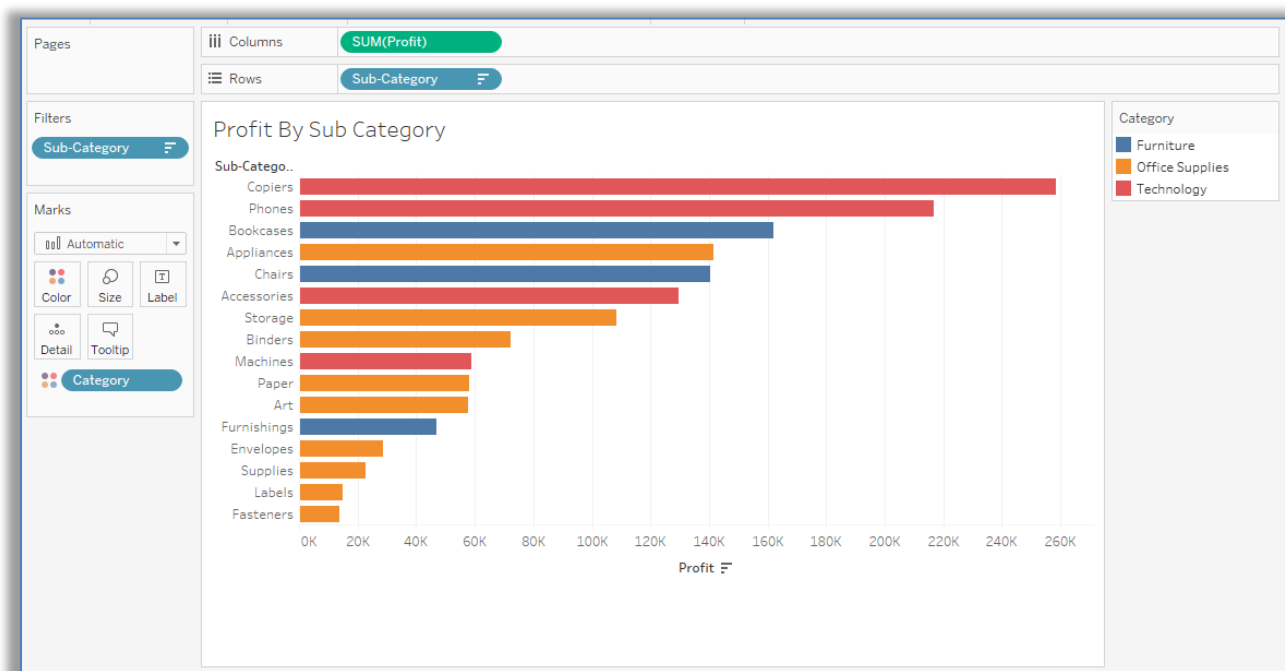
Demo I – Solution

Step 1:

- Click on the Sheet Tab and rename it as Running Total Profit By Segment
- Drag Segment field onto the Columns Shelf and apply a filter by selecting only Consumer
- Drag Profit field on to the Rows Shelf and apply quick table calculation of Running Total
- Drag Order Date field on to the Columns shelf and make it continuous measure
- Drag Category field on to the Colors Shelf
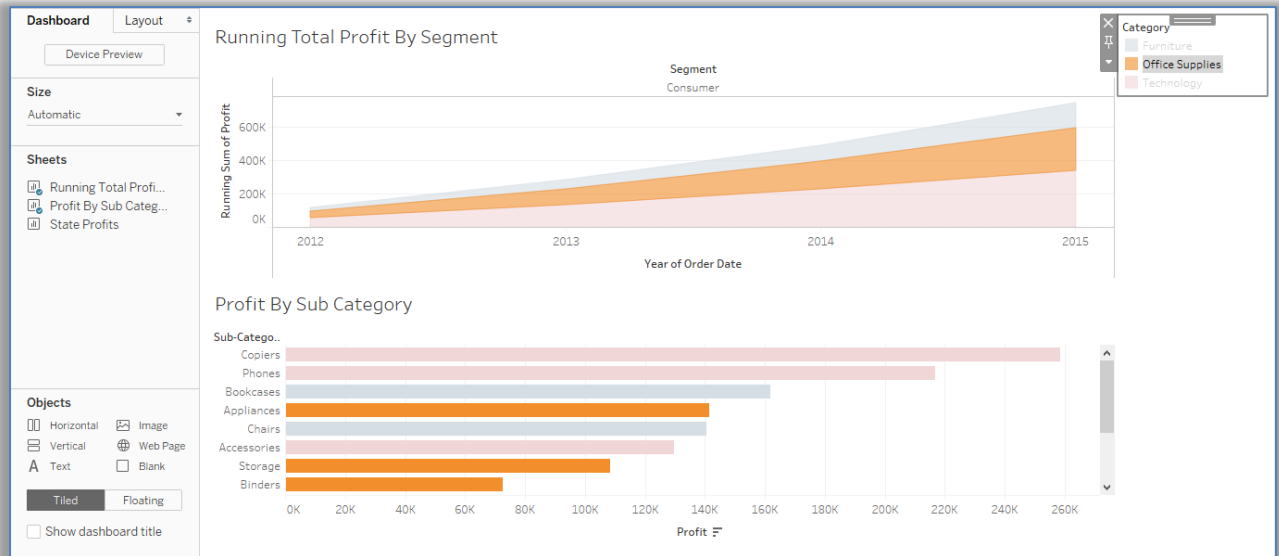- Select Area chart option from the Marks Card

Step 2:

- Add another sheet and rename it as Profit By Sub-Category
- Drag Sub-Category field on to the Rows shelf and Profit field on to the Columns shelf
- Sort Sub-Category into descending order
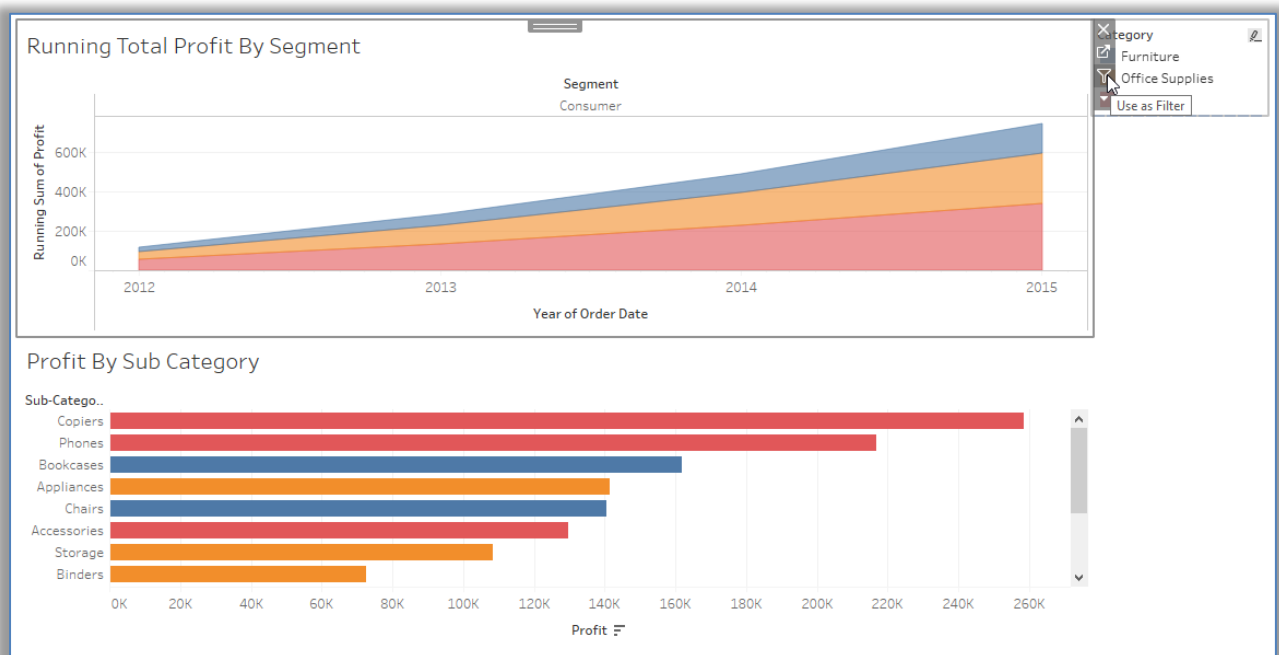- Drag Category field on to the Colors shelf
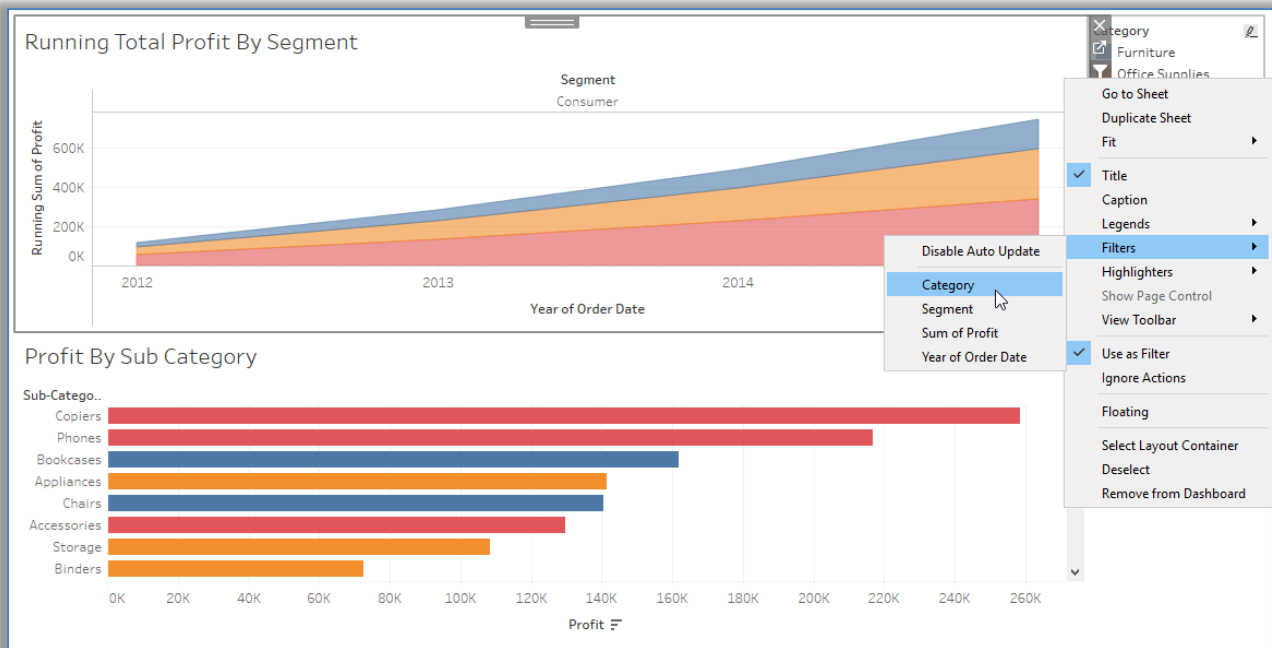

Step 3:

- Click the Dashboard Tab
- Drag Running Total Profit By Segment sheet on to the view pane
- Drag Profit By Sub-Category sheet on to the view pane
- Now, we can interact with the Dashboard using the Legends
- Select the Office Supplies option from the Category Legend, only Office Supplies part will be highlighted on the views
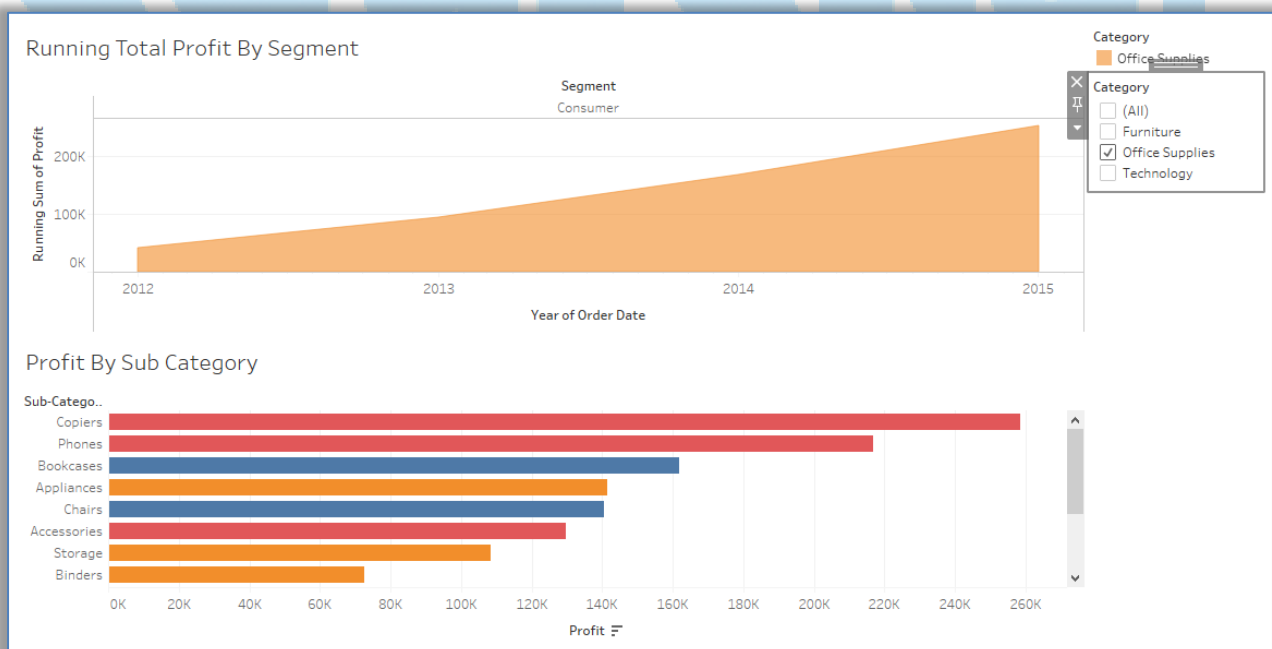
Step 4: Click the Filter icon on the Running Total Profit By Segment view

- Choose Filters → Category to filter the views on the Dashboard based on Category

- Select any one amongst the Category filter, relevant information on the chosen category will be highlighted
- However, the filter is working only on the Running Total Profit By Segment view

▪ Click the drop down menu under Category legend and choose Apply to
Worksheets → All Using This Data Source option in order to apply the
interactive filter to all the views using this Data Source