

Open a new File of Tableau

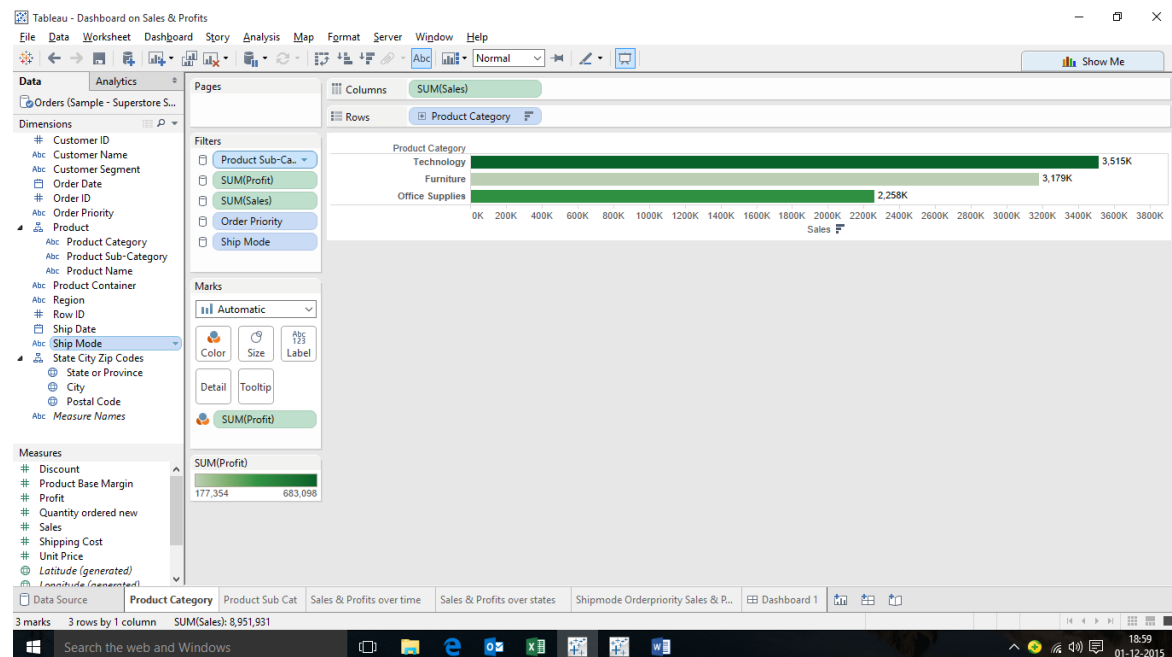
Connect to Data set “Sample - Superstore Subset (Excel)” .

Orders sheet → *“Drag Sheets here”*

Click on Sheet1 & the console shall appear.

1. Creation of Chart 1:

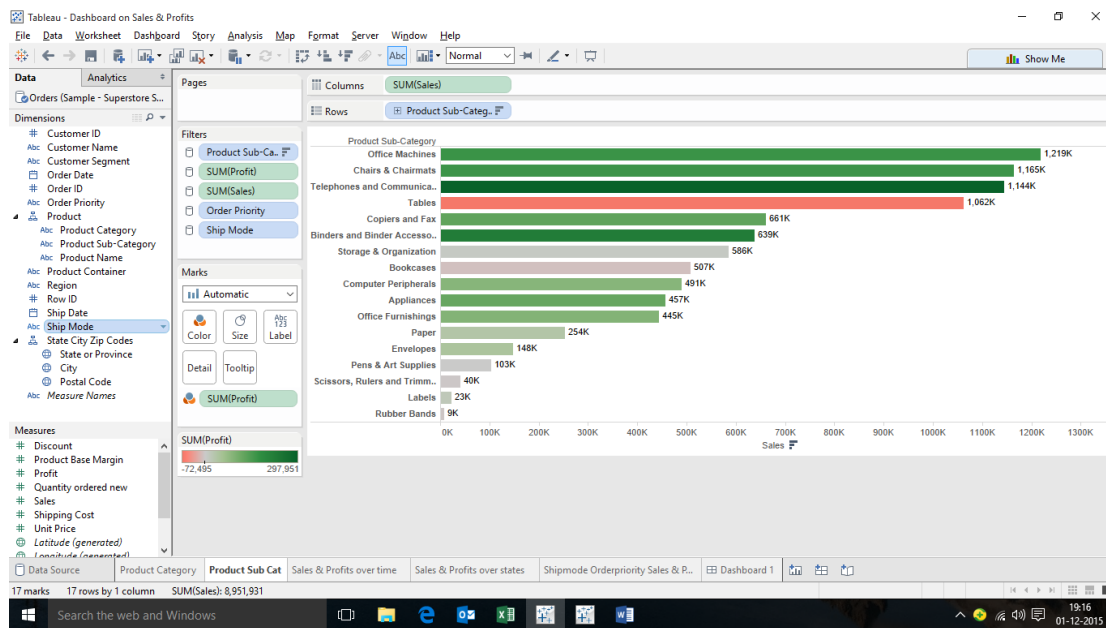
- a. Create Hierarchy “Product Sub-Category” → “Product Name”
- b. “Product Category” → Rows
- c. “Sales” → Column
- d. Sort Descending (Tool Bar)
- e. Show Labels (Click Abc)
- f. Format numbers to Thousands (Right click on chart → Click format → Fields → “Sum(Sales) → Pane → Numbers(Default) → Number(Custom) → Decimal Places to Zero & Units to Thousands
- g. “Profit” to Colors
- h. “Product Category” , “Product Sub-Category” , “Profit” , “Sales” , “Order Priority” , “Ship Mode” to Filters. For Profit & Sales, set the aggregation as Sum.
- i. Right click on all filters one after the other and set them as global filters
 - i. (Steps on setting as global filter) → Right click on any filter → Apply to Worksheets → “All Using this Data Source”.



2. Creation of Chart 2:

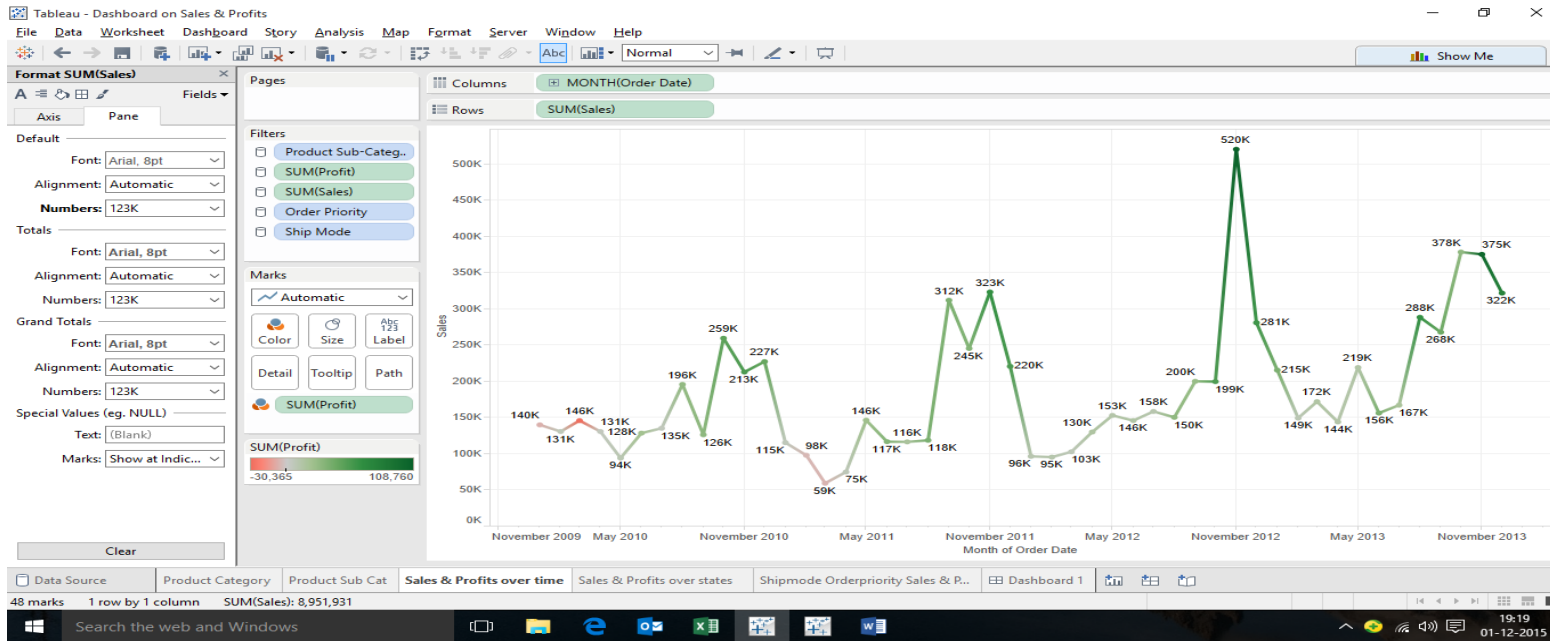
- a. “Product Sub-Category” → Rows
- b. “Sales” → Column
- c. Sort Descending (Tool Bar)
- d. Show Labels (Click Abc)
- e. Format numbers to Thousands (Right click on chart → Click format → Fields →

- “Sum(Sales) → Pane → Numbers(Default) → Number(Custom)→ Decimal Places to Zero & Units to Thousands
- f. “Profit” to Colors



3. Creation of Chart 3:

- “Order date” → Rows → Right click order date in Rows and change it to “Continuous” → Expand the view to Month
- “Sales” → Column
- Show Labels (Click Abc)
- Format numbers to Thousands(Right click on chart → Click format → Fields → “Sum(Sales) → Pane → Numbers(Default) → Number(Custom)→ Decimal Places to Zero & Units to Thousands
- “Profit” to Colors



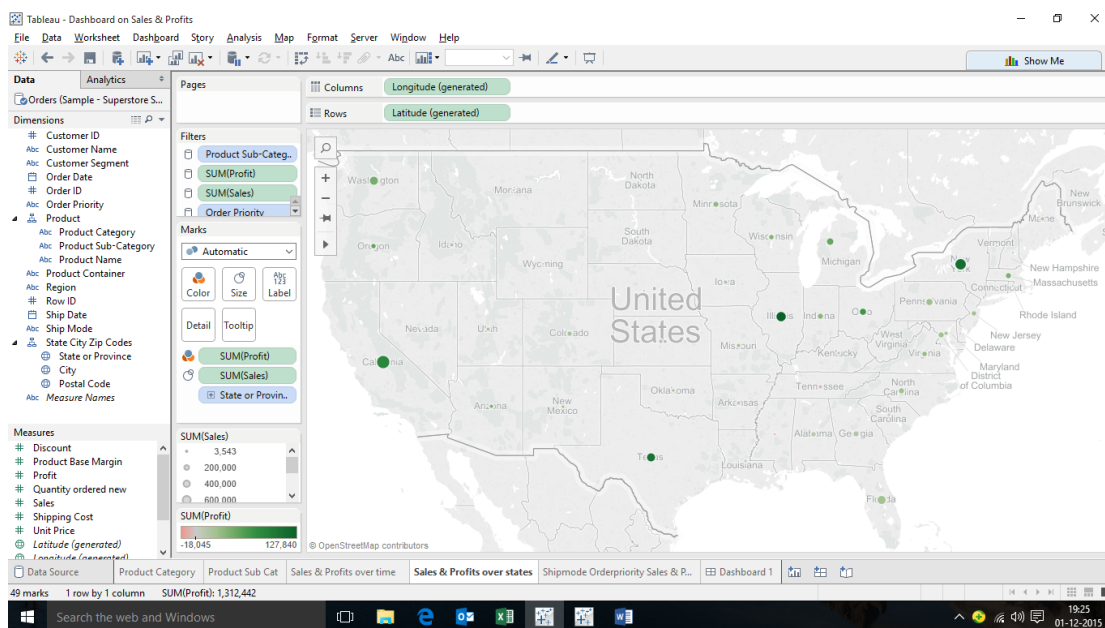
4. Creation of Chart 4:

a. Double Click “State”

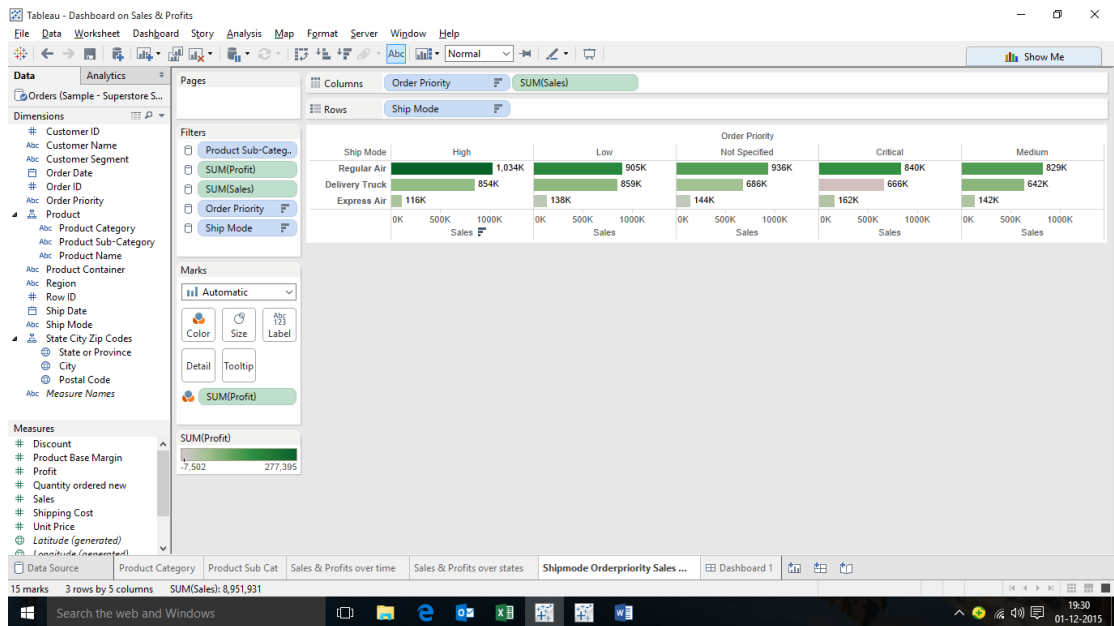
i. If you get a message saying “49 Unknown”, Click on it →Edit Filter
→Fixed to USA

b. “Sales” →Size

c. “Profit” to Colors



5. Creation of Chart 5:
 - a. “Ship Mode” → Rows
 - b. “Order Priority” → Column
 - c. “Sales” → Column
 - d. Sort Descending (Tool Bar)
 - e. Show Labels (Click Abc)
 - f. Format numbers to Thousands(Right click on chart → Click format → Fields → “Sum(Sales) → Pane → Numbers(Default) → Number(Custom)→ Decimal Places to Zero & Units to Thousands
 - g. “Profit” to Colors



6. Open a Fresh Dashboard and arrange the created sheets to the dashboard.
 - a. Click on any of the sheets → Show Quick filter → Select Product Subcat , Order Priority , Ship Mode , Profit & Sales
 - b. Remove unwanted legends

