

Tableau Project

CEP – 2

Comparison of Region Based on Sales

By

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Description

The director of a leading organization wants to compare the sales between two regions. He has asked each region operators to record the sales data to compare by region. The upper management wants to visualize the sales data using a dashboard to understand the performance between them and suggest the necessary improvements.

Objective:

Help the organization by creating a dashboard to visualize the sales comparison between two selected regions.

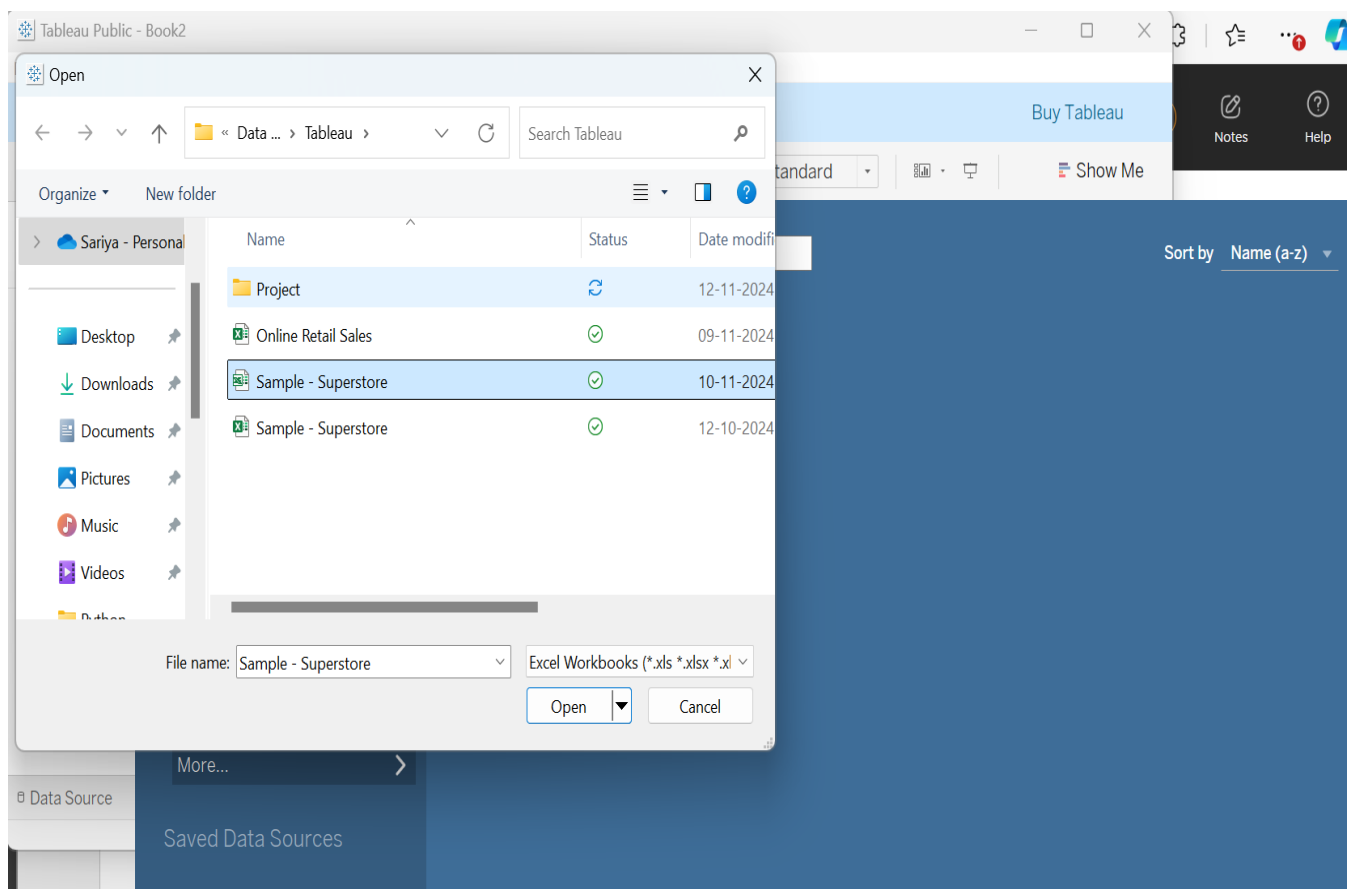
Datasets:

Sample Superstore

Steps to Perform:

1. Select Sample Superstore as Dataset

1. Use Sample Superstore Dataset

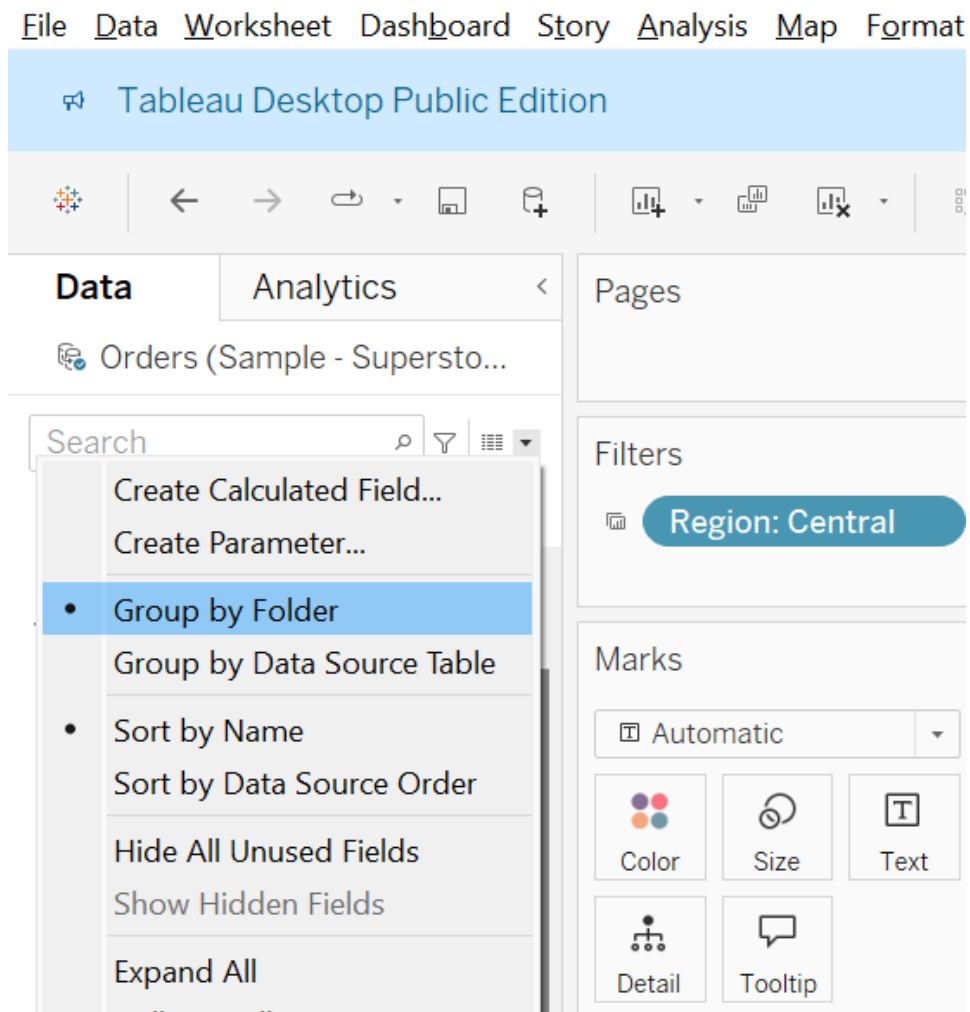


2. Select Data

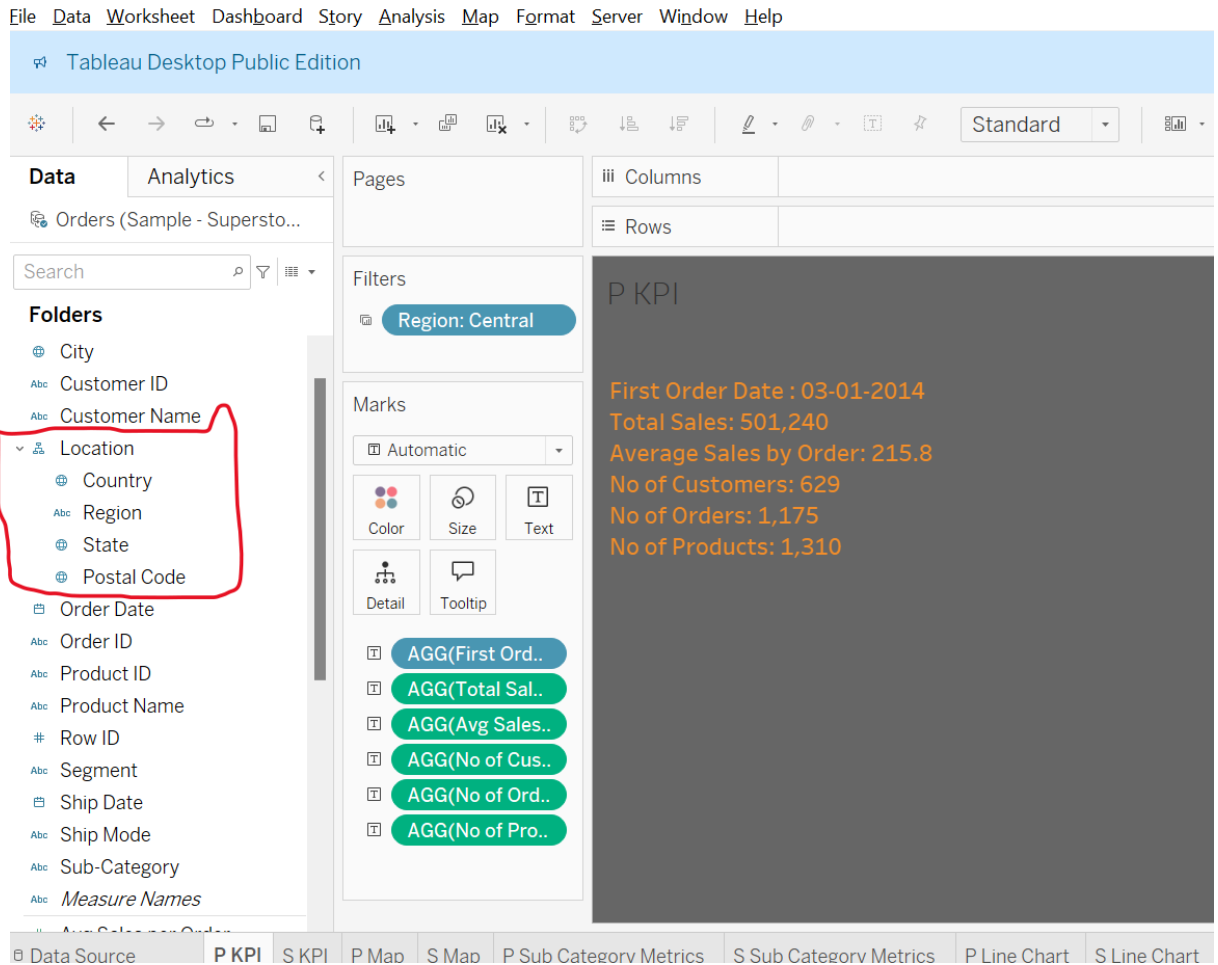
The screenshot shows the Tableau Desktop Public Edition interface. The title bar indicates 'Tableau Public - Tableau CEP-1'. The menu bar includes 'File', 'Data', 'Window', and 'Help'. The main window displays the 'Orders (Sample - Superstore) (2)' data source. The sidebar on the left shows 'Connections' with 'Sample - Superstore' (Microsoft Excel) and 'Sheets' with 'Orders', 'People', 'Returns', 'New Union', and 'New Table Extension'. The 'Orders' sheet is selected, and a preview of the data is shown at the bottom. The preview table has columns: Row ID, Order ID, Order Date, Ship Date, and Ship Mode. The data shows three rows of order information.

Row ID	Order ID	Order Date	Ship Date	Ship Mode
1	CA-2016-152156	08-11-2016	11-11-2016	Second Class
2	CA-2016-152156	08-11-2016	11-11-2016	Second Class
3	CA-2016-138688	12-06-2016	16-06-2016	Second Class

3. Use Group by from Data Source Table on a Folder to create a folder to segregate the required data



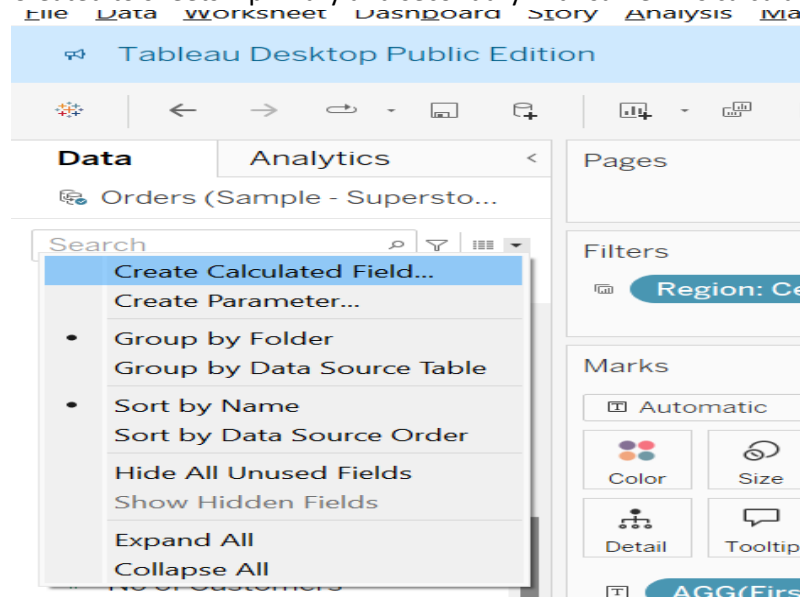
2. Create a hierarchy called Location



3. Create two parameters: Primary Region and Secondary Region with all regions listed in them.

1. Create Parameters for Primary Region and Secondary Region

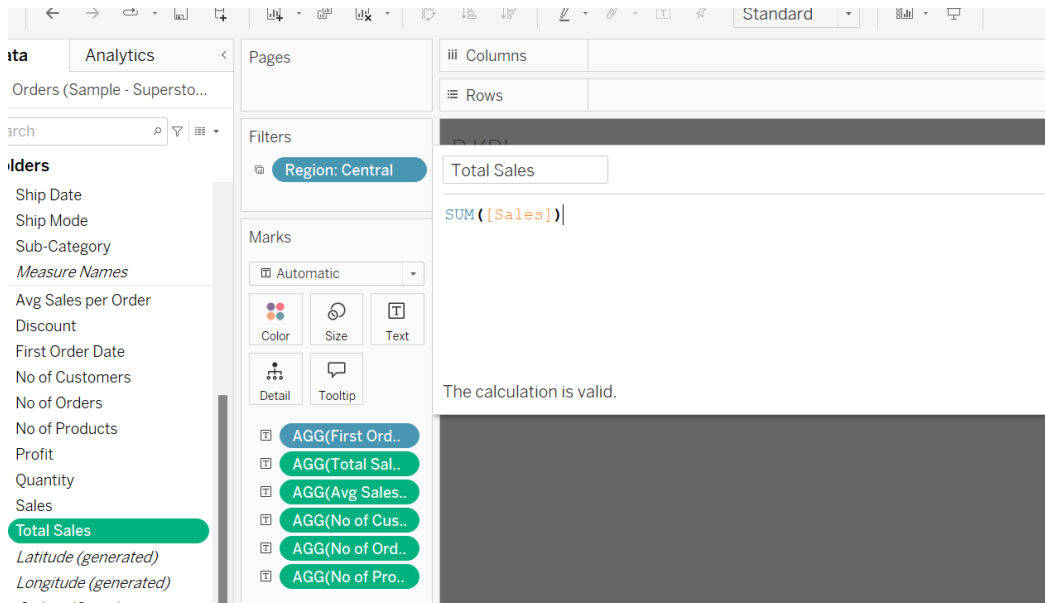
- Created to sheets – primary and secondary with same KPIs calculated fields



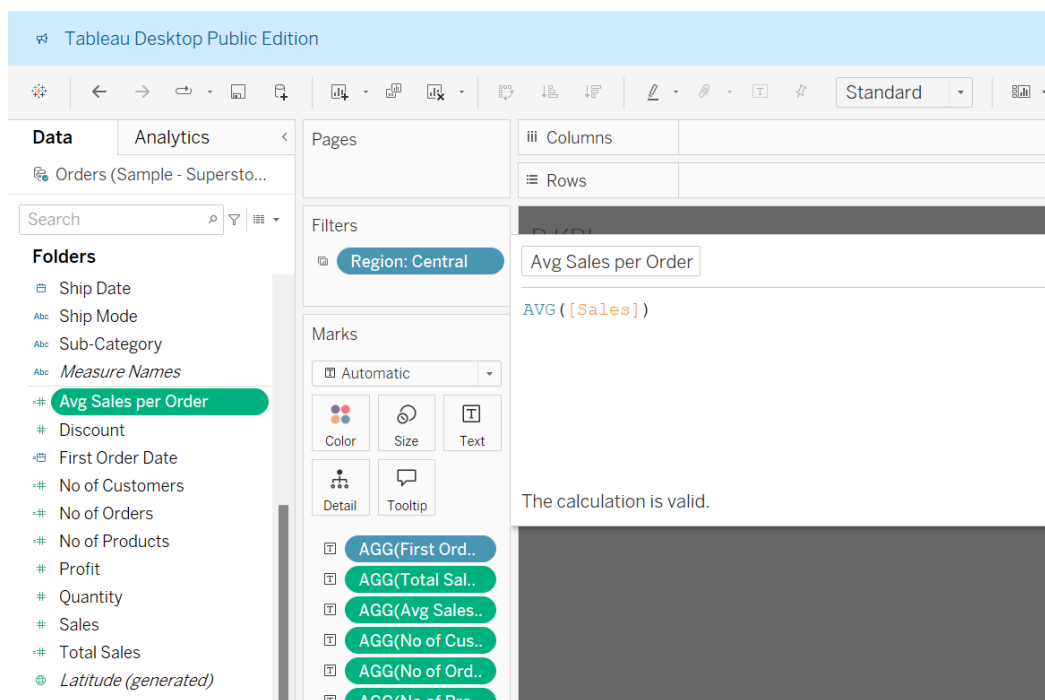
2. Create a Calculated Field for both Primary Region and Secondary Region

- Created the following calculated fields

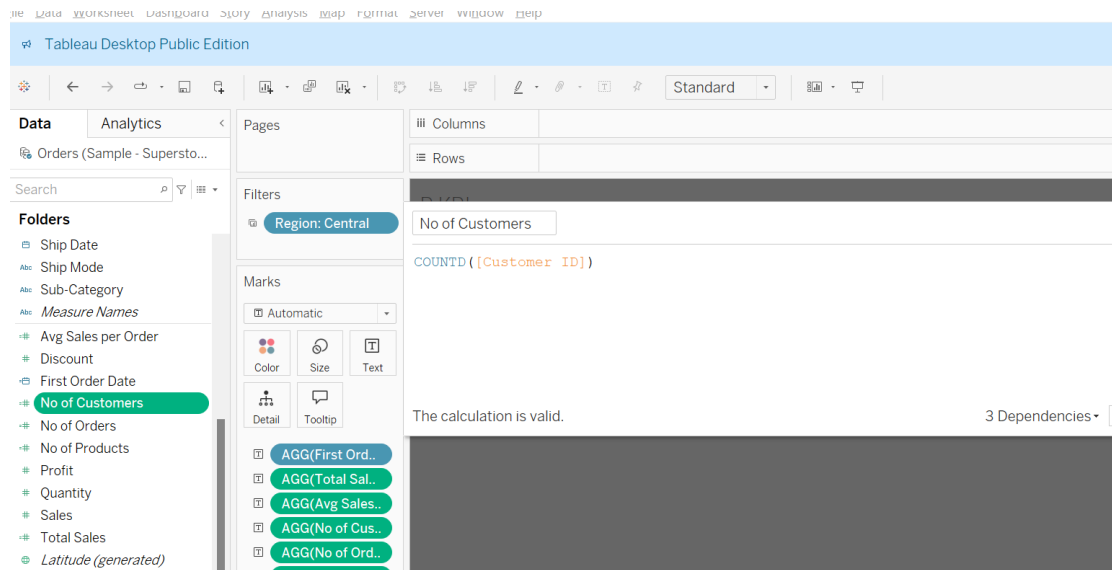
1. Total Sales



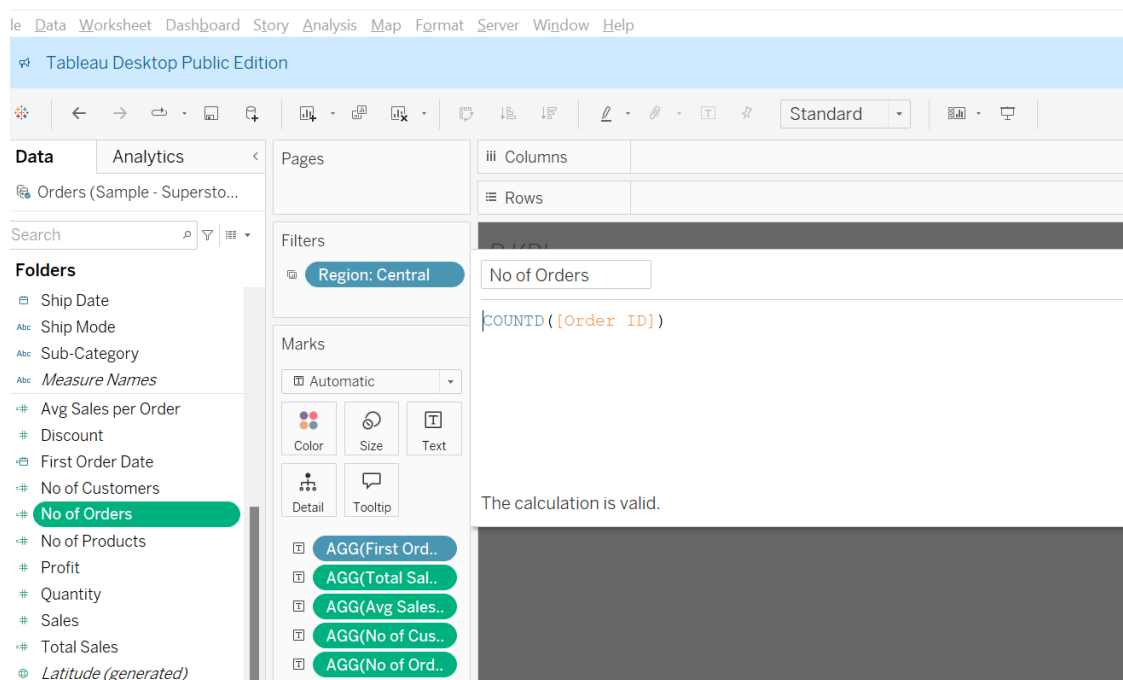
2. Avg Sales per Order



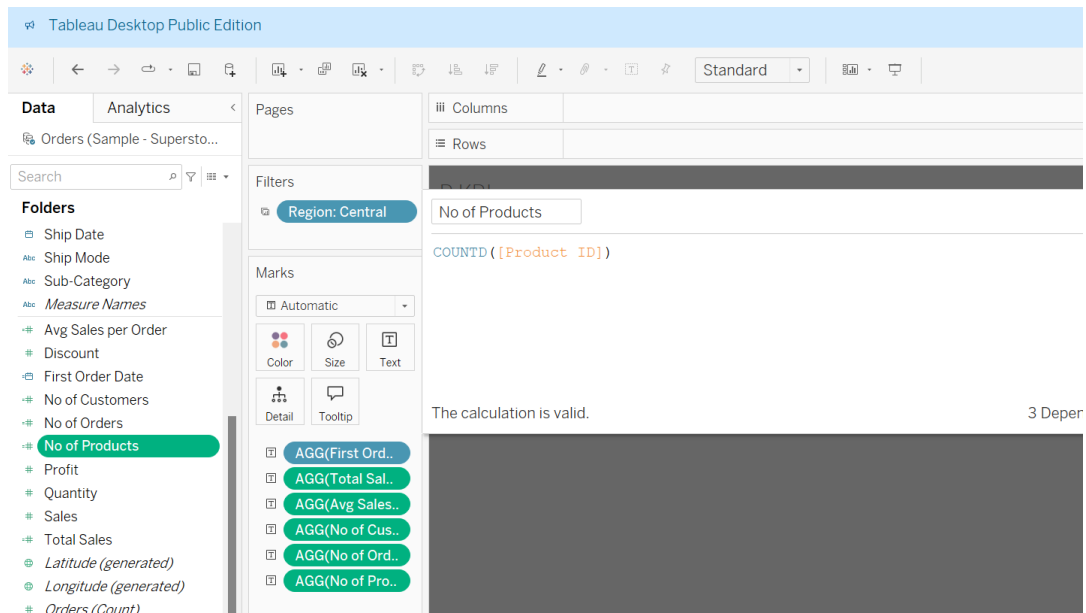
3. No of Customers



4. No of Orders

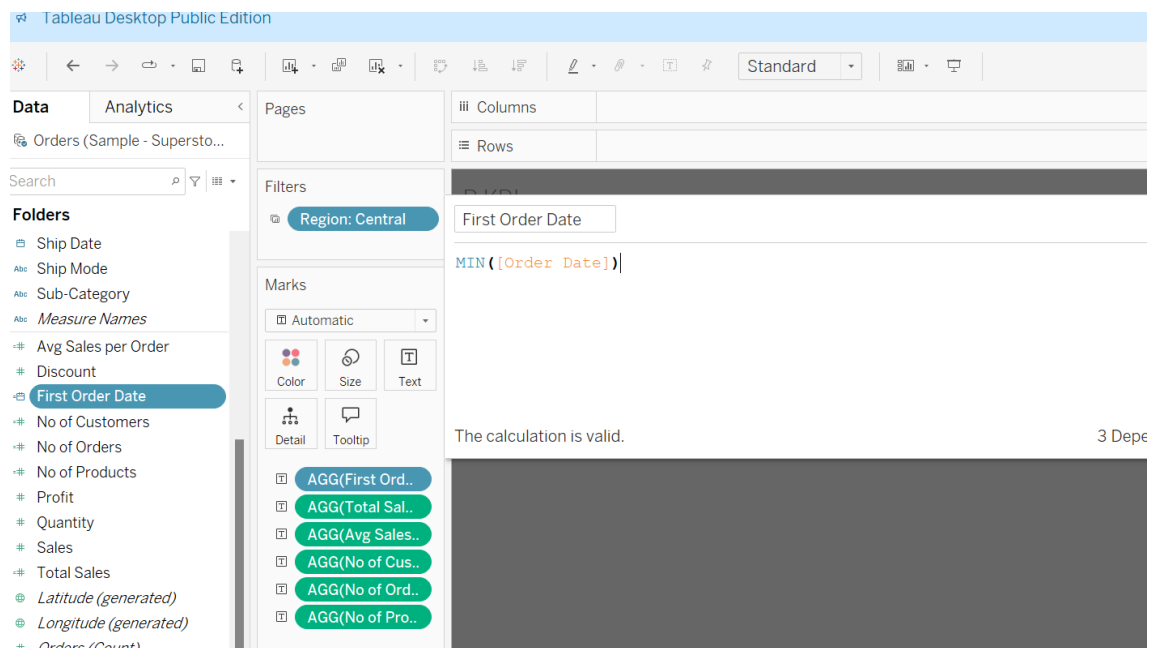


5. No of Products

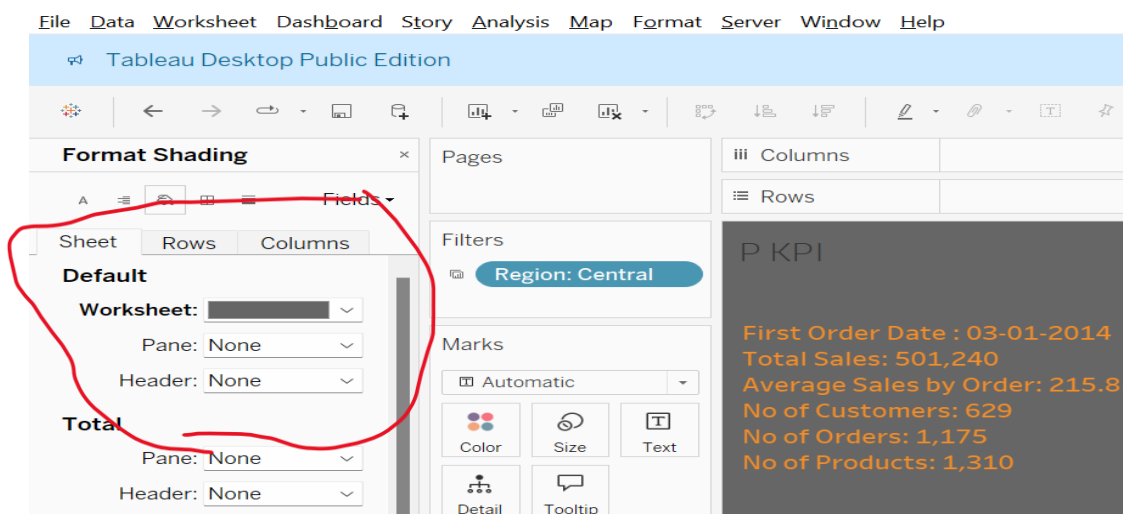
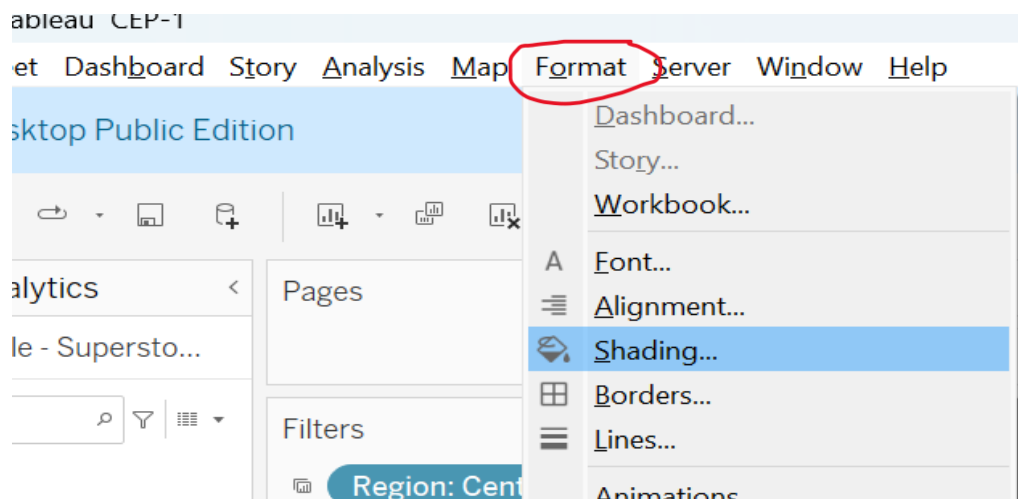
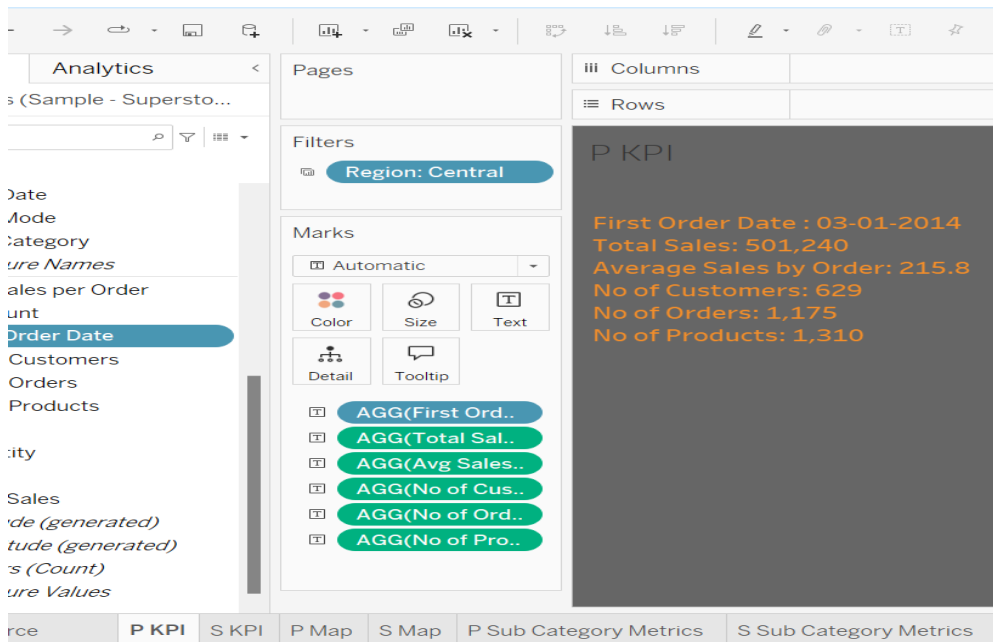


4. Create a First Order Date

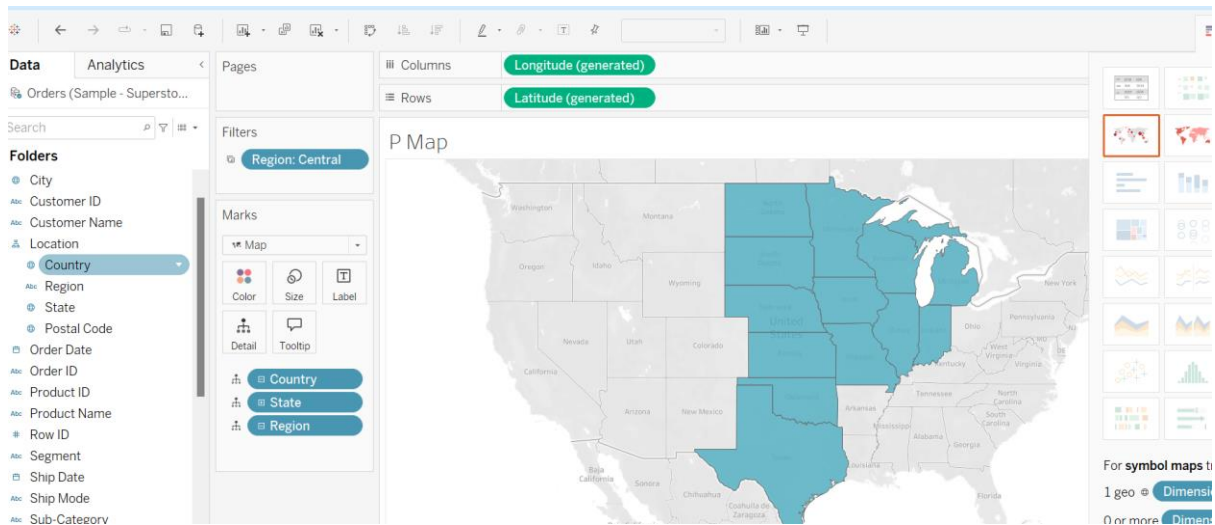
1. Create a Calculated Field and name it as the First Order Date



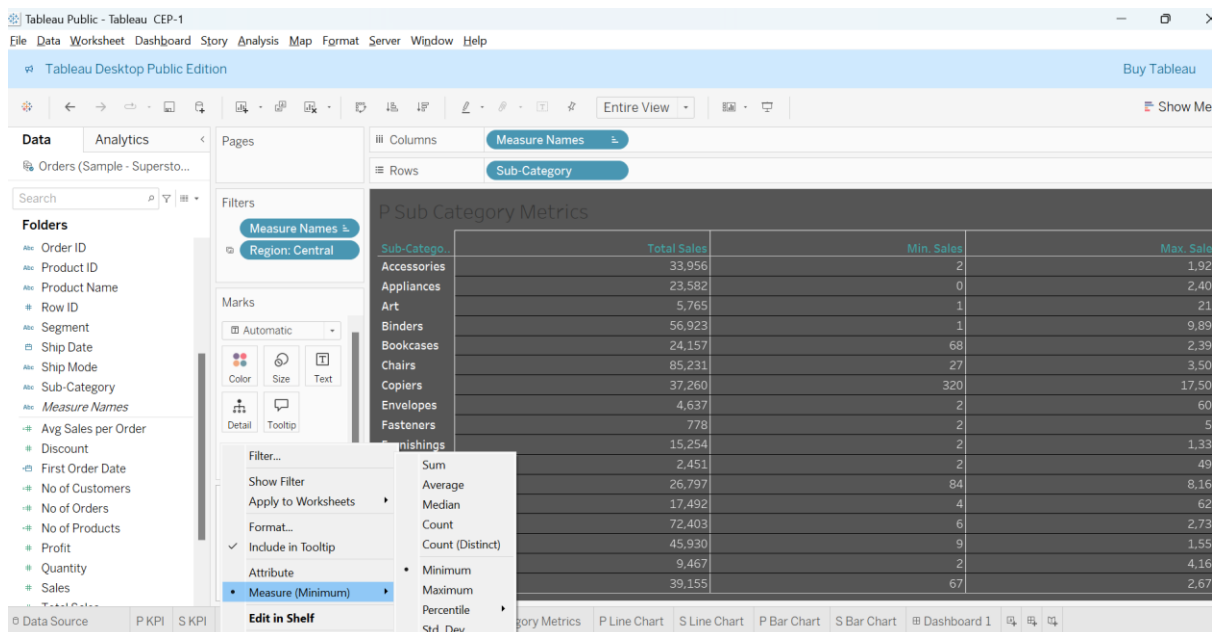
Add all the calculated fields to the Text and name the sheet at P KPI (Primary KPI). Also format the worksheet under the “Format” tab and change color of text and shading as shown in the screenshot. Duplicate the sheet and name it as S KPI (secondary KPI)

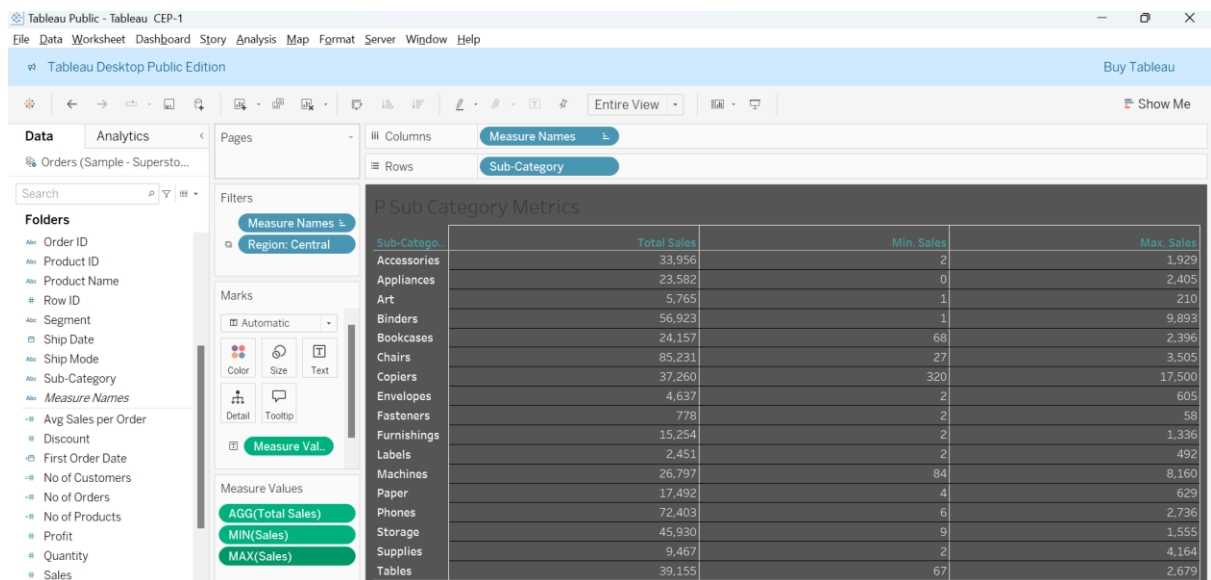
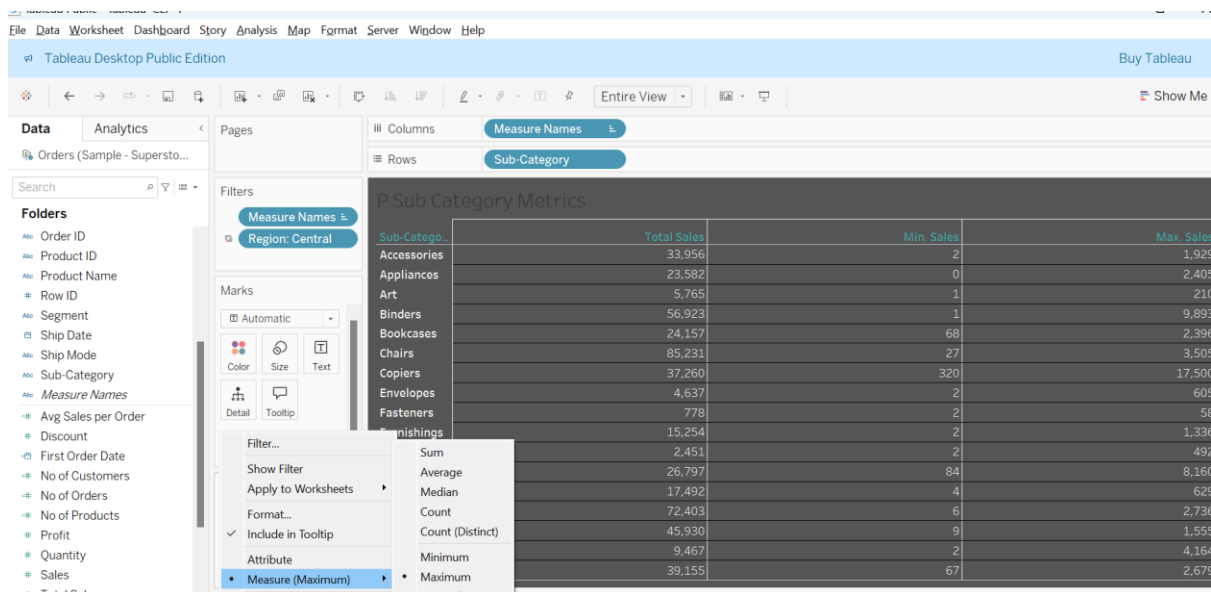


Create another sheet as name it as Primary Map – select Country and State and select the Map from the show-me section as shown in the screenshot below. Duplicate the sheet and name it as S Map

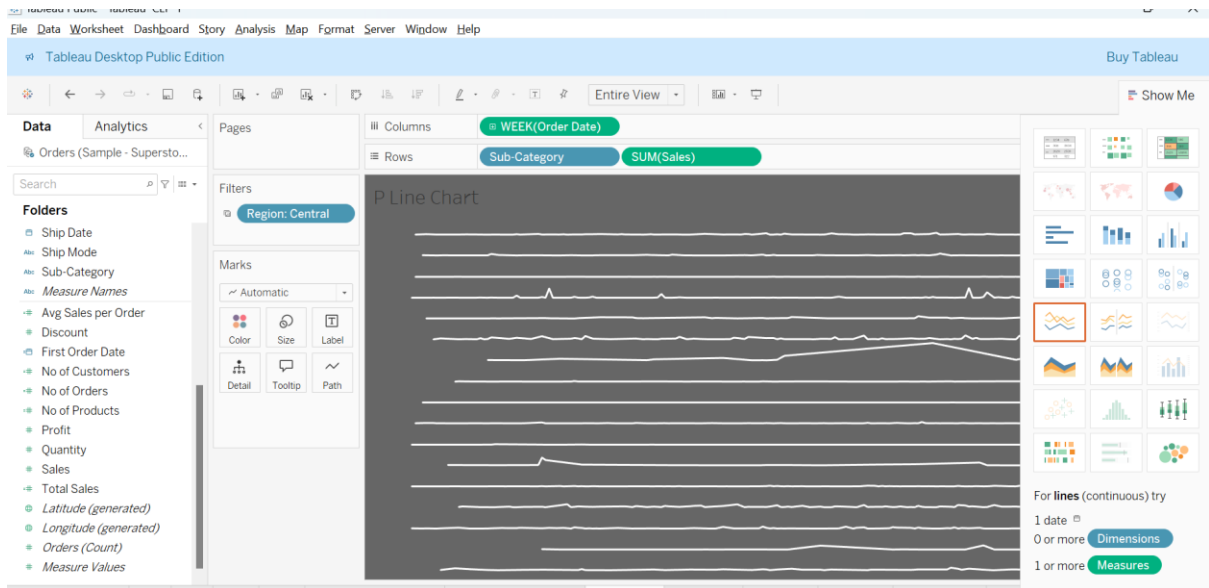


Create another sheet – name it as Primary Sub Category Metrics and select Sub- Category under rows and add Total Sales as columns. Create two more columns of Total sales and select as min and max values for each respectively. And finally duplicate the sheet as name it as S Sub Category Metrics

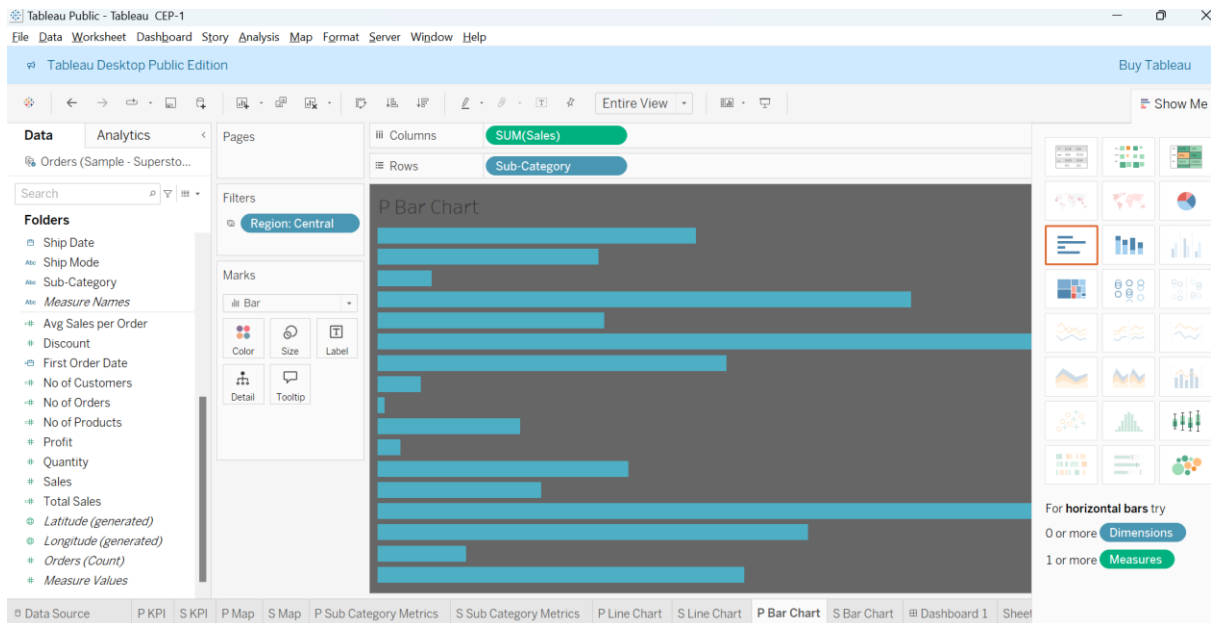




Create a sheet for Line chart and name as 'Primary Line chart' using Order date and Sales as measure and Sub- Category. Filter Order date to week-level and format the worksheet and remove the headers as shows below. Duplicate the sheet ot create Secondary Line Chart Sheet.



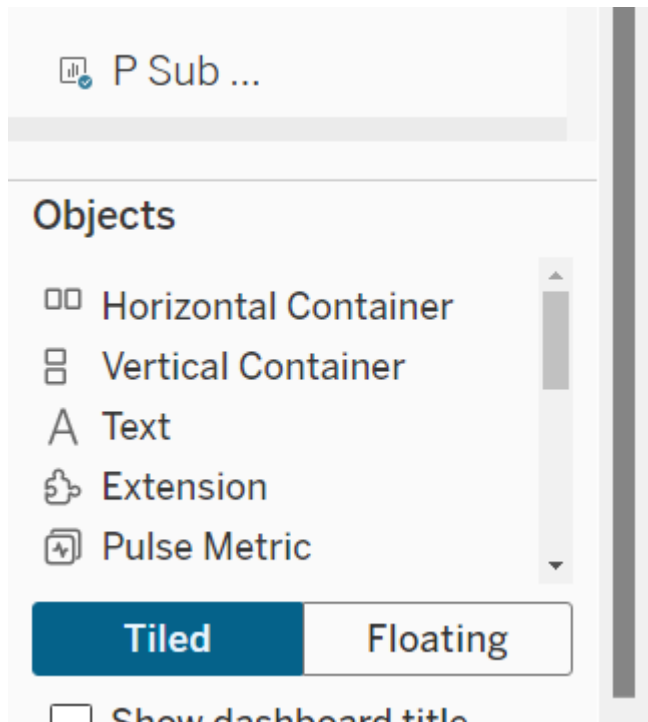
Finally create another sheet with Bar chart with Sub Category as rows and Sales as columns as shows. Duplicate the sheet to create a secondary Bar Chart sheet.



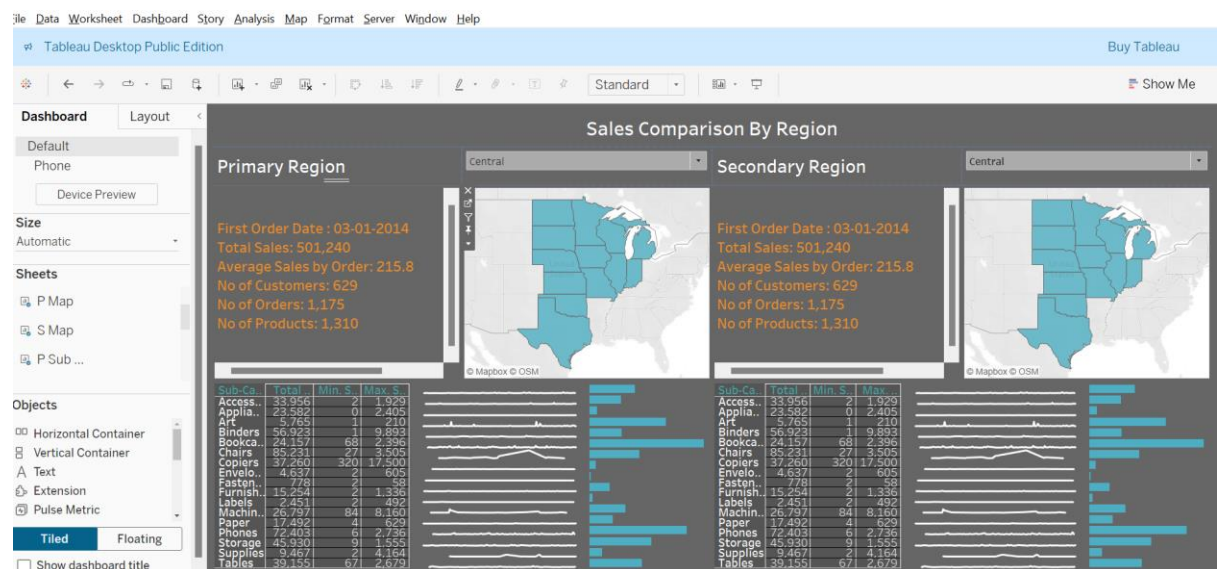
5. Create a dashboard

1. Align all sheets in the dashboard

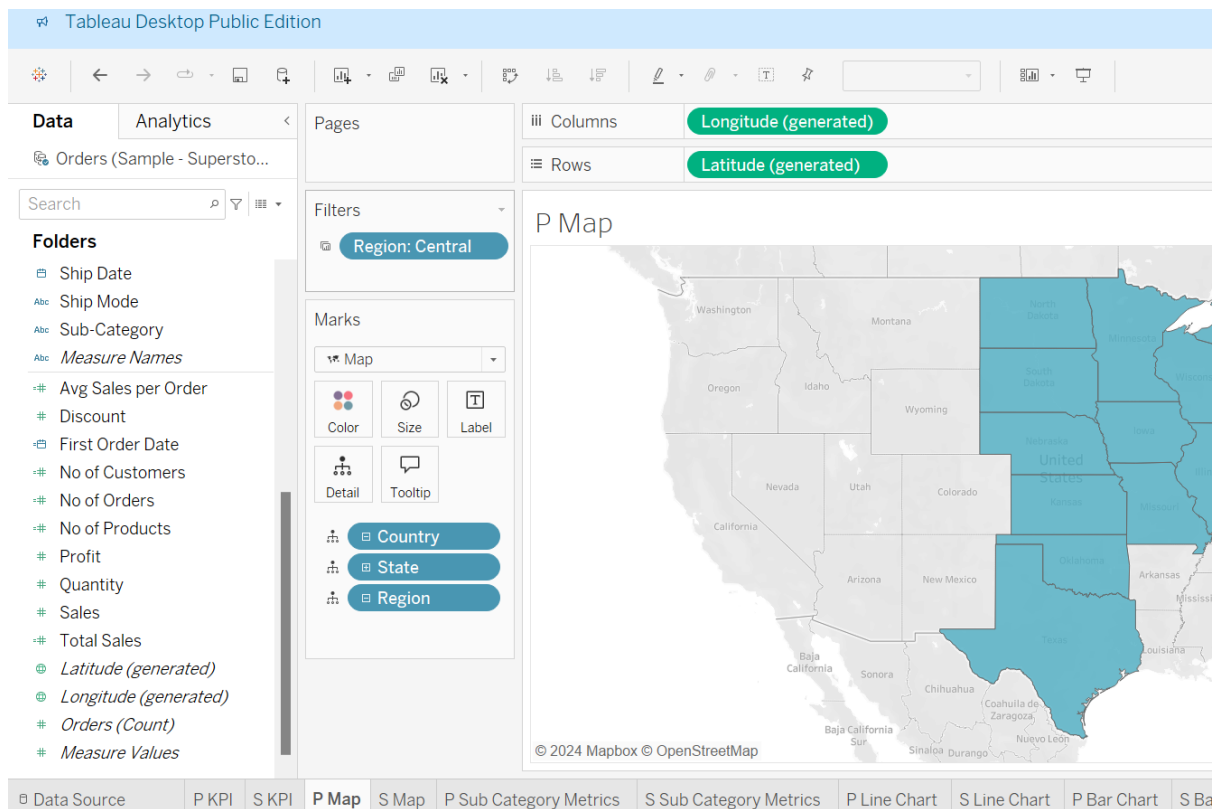
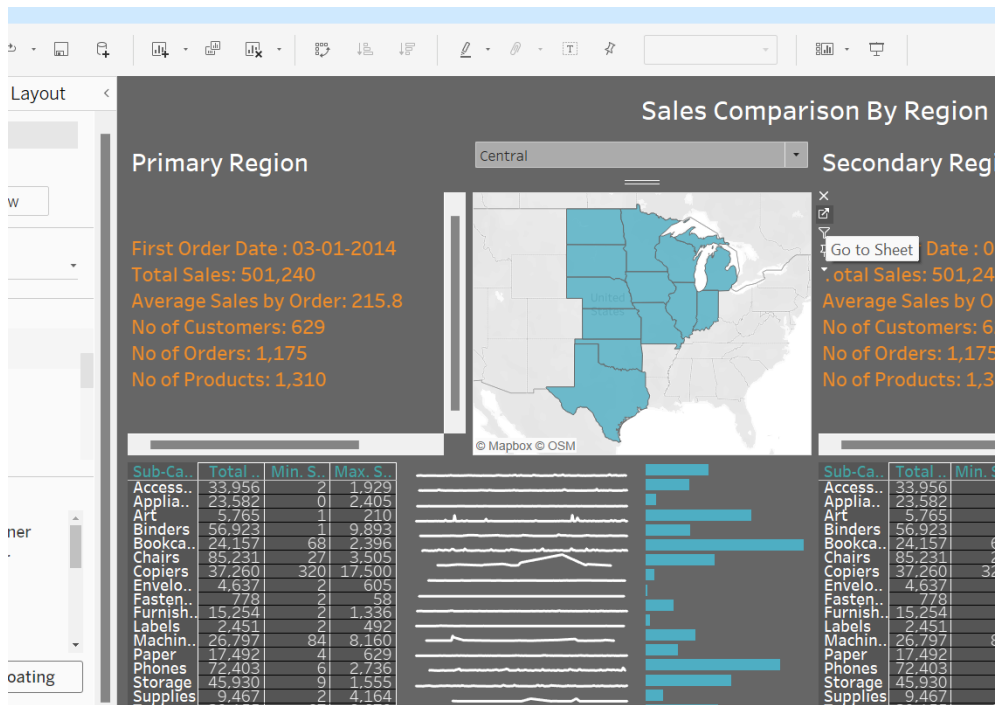
Create a Dashboard and create the layout using the horizontal and vertical containers.



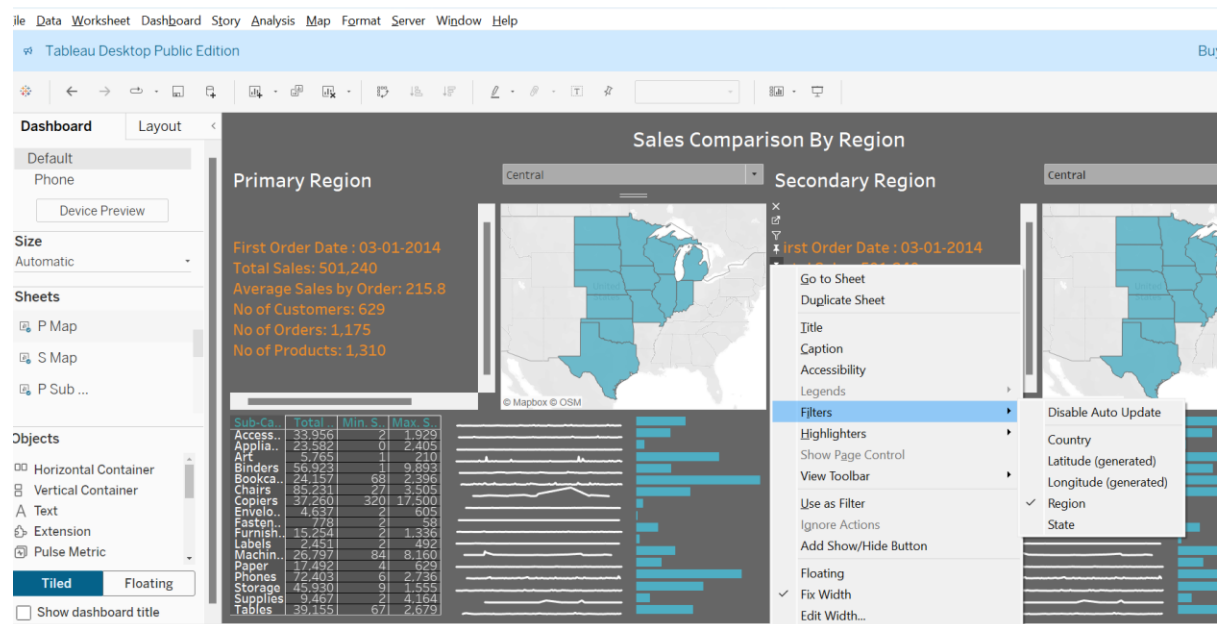
Once the layout is created, drag and drop the sheets in two sections Primary to the left and Secondary to the right as shown below in the screenshot.



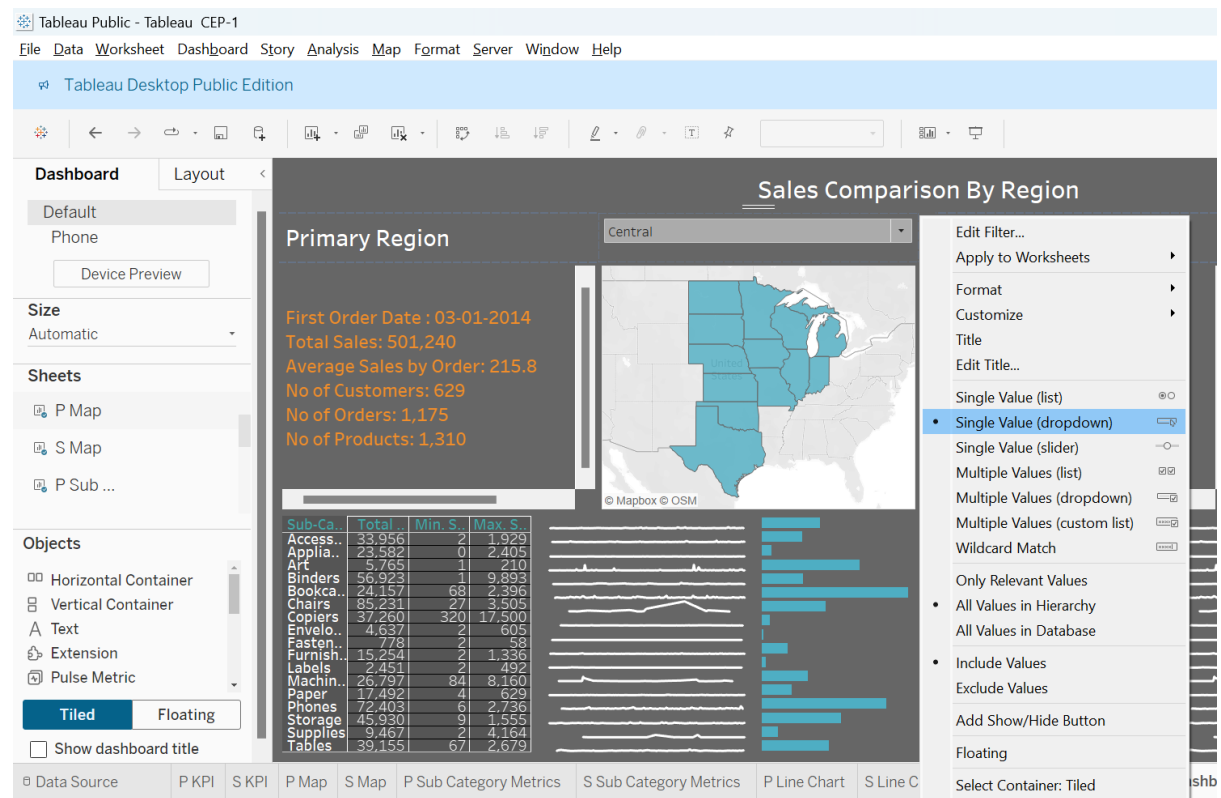
Add filter to select the region – select the map section and click on go to sheet as shown below and add the “Region” to the filter section on the sheet.



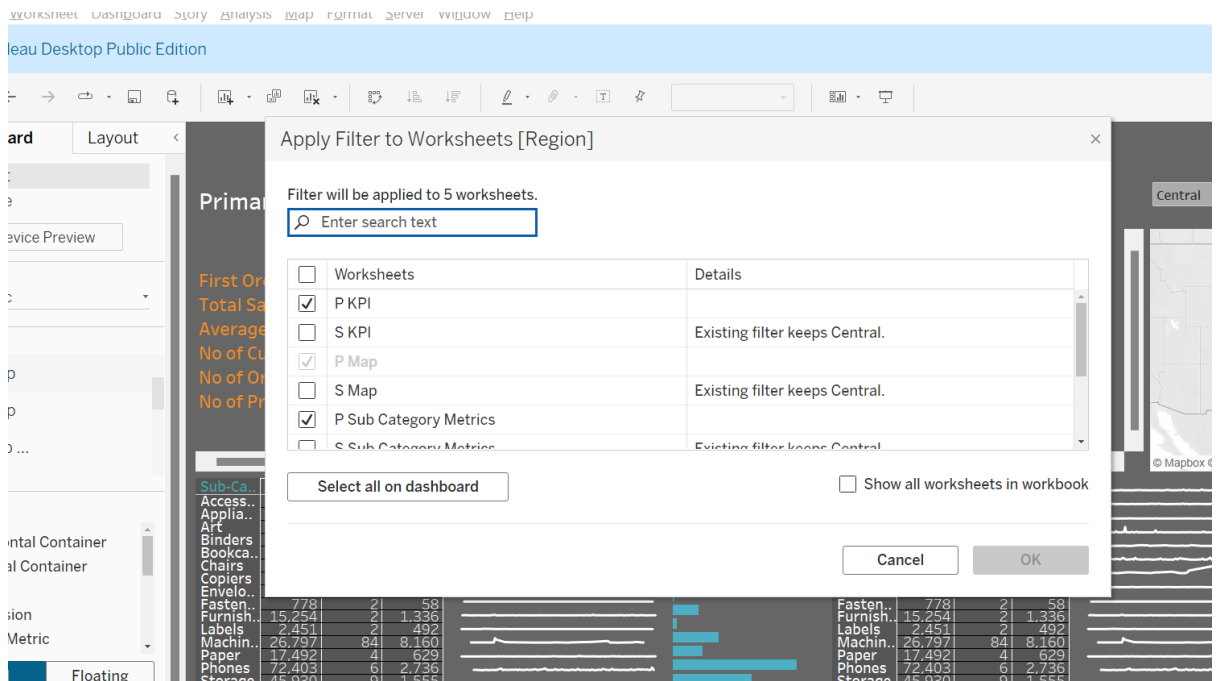
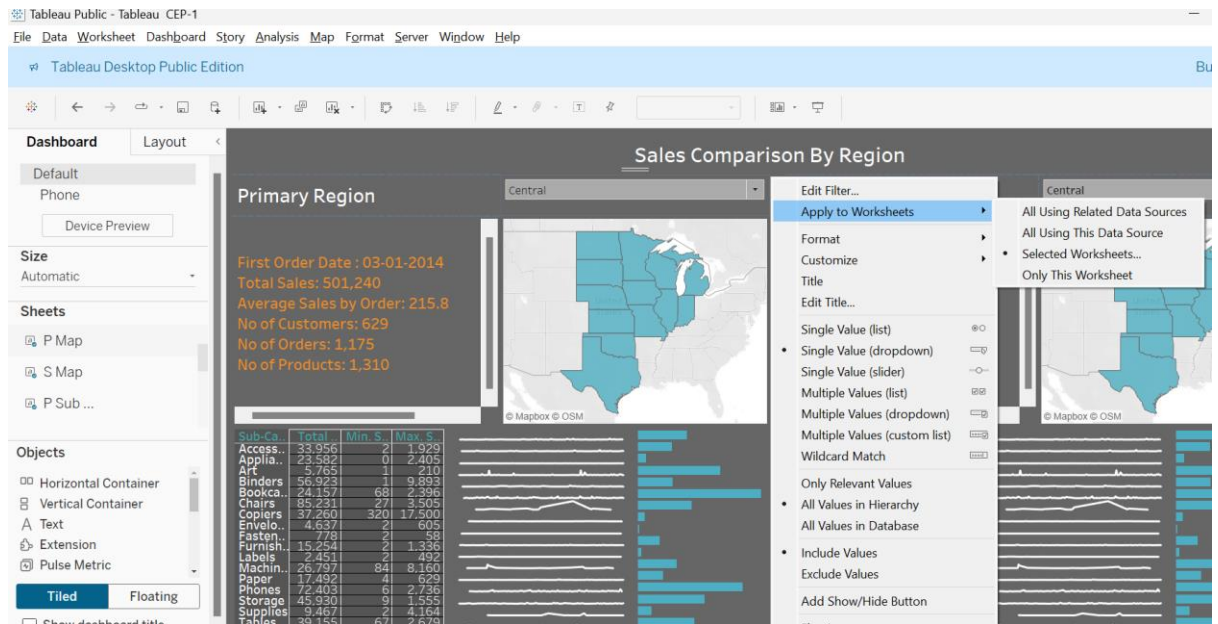
The on the Dashboard – select the drop down and under “ Filter” Select “Region” as shown below.



Under the filter change it to “Single Value(Dropdown)” as shown below.



Select the sheets you want the filter to be applied to as shown below. Select the primary filter for all the primary sheets and Secondary for the Secondary sheets



6. Partition the dashboard to display the below details of Primary Region and Secondary Region

1. First Order Date
2. Total Sales
3. Average Sales per Order
4. No. of Customers
5. No. of Orders

6. No. of Products in Sale

Final Dashboard is ready as shown below. You can filter the region and see the data get updated below.

