# 20 – PBD-002

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Tableau Assignment

Design a Dashboard and Story point for the following sheets. By taking suitable data store. Also, produce the results with the necessary interpretation.

1. Interactive Filter action on summary levels of sum and profit on dual axis.
   - Create two new worksheets 'Sales1' and 'Sales2'.
   - In 'Sales1' sheet, take 'category' in row as well as 'sales' and 'profit'in column.
   - Right clicking on 'profit' and again select dual axis.
   - click on sales, and select measure average.
   - In marks card, drag and drop 'measure names' on colour.
   - In 'Sales2', drag and drop 'category' and 'sub category' on column and 'profit' and 'sales' on row.
   - right click on sales and select measure average
   - Drag and drop 'measure names' on Colour in Marks Card.
   - On title bar, go to worksheet- Actions.
   - Click on Add Actions-Highlight.
     - In Source Sheets, select "sales1" and in Target Sheets select "sales2".
     - See that run action on is Select, and click on ok.
     - Now from source sheet, select any desired category & profit or sales, and you will getregarding information in destination.
     - After click on desired sales or profit of a category, source and destination will be like,
   - It means when you click on Profit of Furniture, in destination it will show you information ofprofit accordingly.

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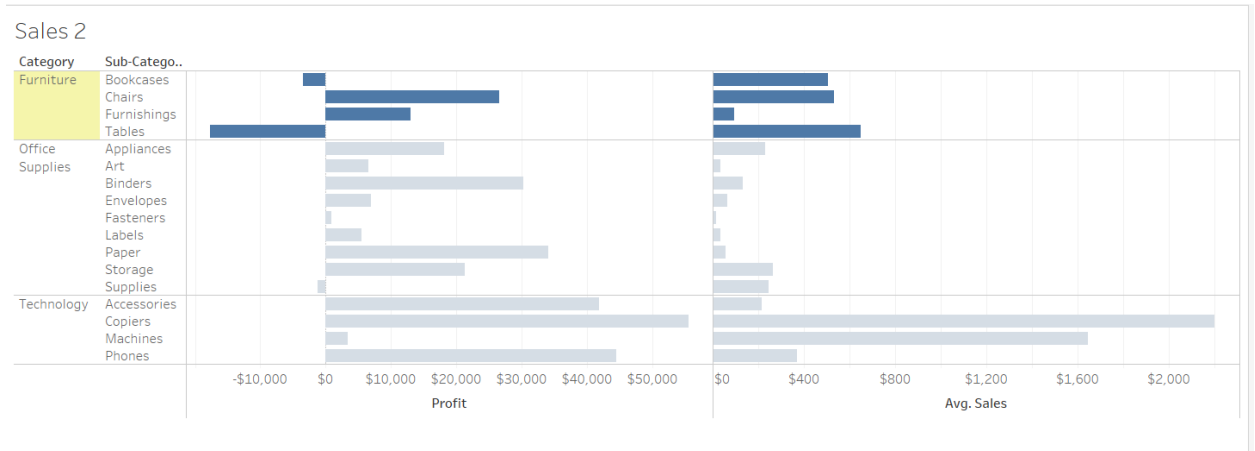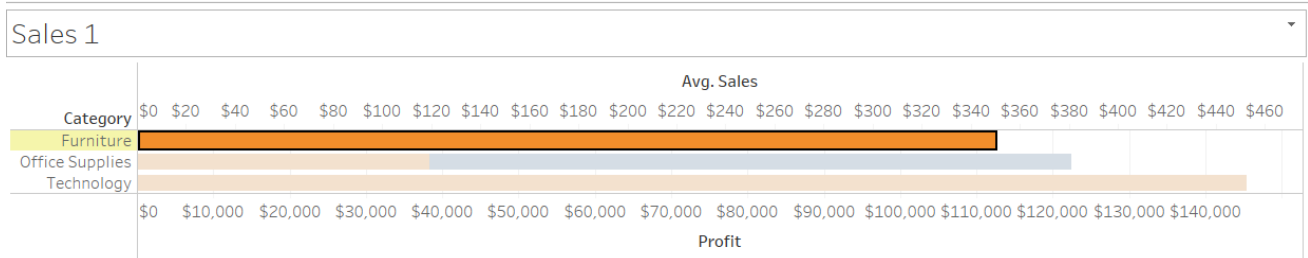
- **Interpretation:** Using Filter Actions on Summary levels, we can easily get the required information by just a single click, and we can use it to highlight what we want.

## 2. Action filters on country's sales with the hover option

- Create two new worksheets and rename them as 'source' and 'destination' respectively.
- In source, drag and drop 'longitude' and 'latitude' on column and row respectively.
- Drag and drop 'country' on colour in marks card.
- In destination, drag and drop 'category' and 'country' on column section and 'sales' on rowsection.
- Drag and drop 'category' on colour and 'sales' on labels in marks card.
- From title bar go to Worksheet→Actions→Add Actions→Filter.
- In source sheets select 'source' and 'destination' in target sheets.
- Click on hover action from Run action on and click on ok.
- From source sheet click on desired country of which you want to observe the sales.
- After clicking on desired country from source, the destination will show the sales of that particularcountry.
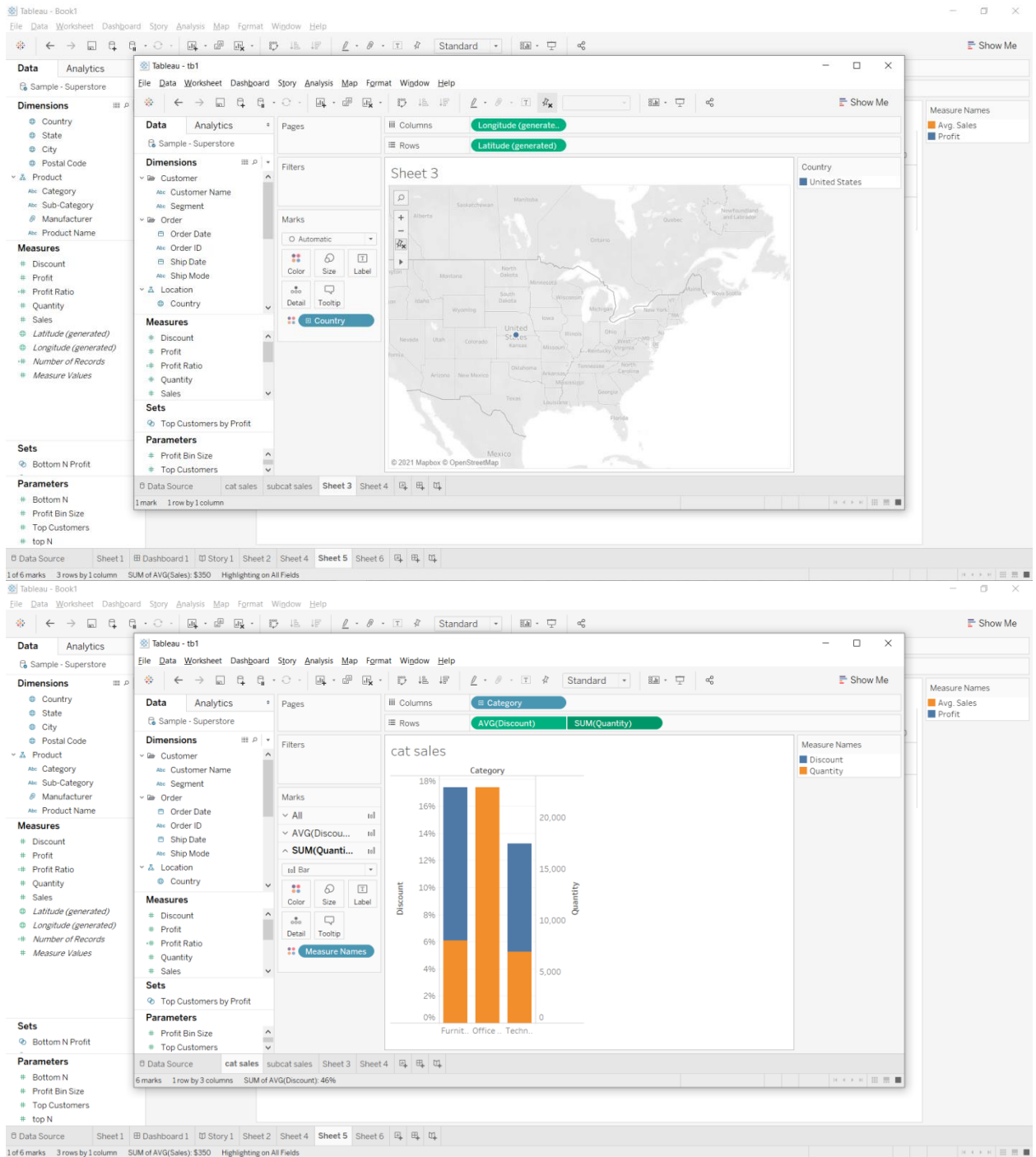
3. Bar and stacked representation with parameter usage for Top 3 Sales& Bottom 4 profit along with the index.

- Create a new worksheet and rename it as Top and Bottom N.
- Drag and drop 'sales' and 'subcategory' on column and row respectively.
- Drag and drop 'sales' on colour and 'sales' on labels on marks card.
- Select any dimension and right click on it and go to create-parameter.

- Rename the parameter name by 'Top N', set datatype as integer, current value as 5, value whenworkbook opens as current value, display format as automatic and allowable values as all.
- Click on ok and similarly create another parameter with name 'Bottom N'.
- Right click on 'subcategory' from dimension and select create-set.
- Name the set as 'top N customers' and from by field option select 'top' and set the value as 5.
- Similarly, create another set as 'Bottom N Customers' and from by field option select 'bottom'and set the value as 5.
- Now select both these sets and on right clicking them you will find an option to Create CombinedSet.
- Name it as **'**Top N and Bottom N' and drag and drop it on filters card.
- It will generate the Top 5 and Bottom 5 customers as below.
- Right click on 'Top N' parameter and select show parameter, it will generate a legend to controlthe number of top categories in output.
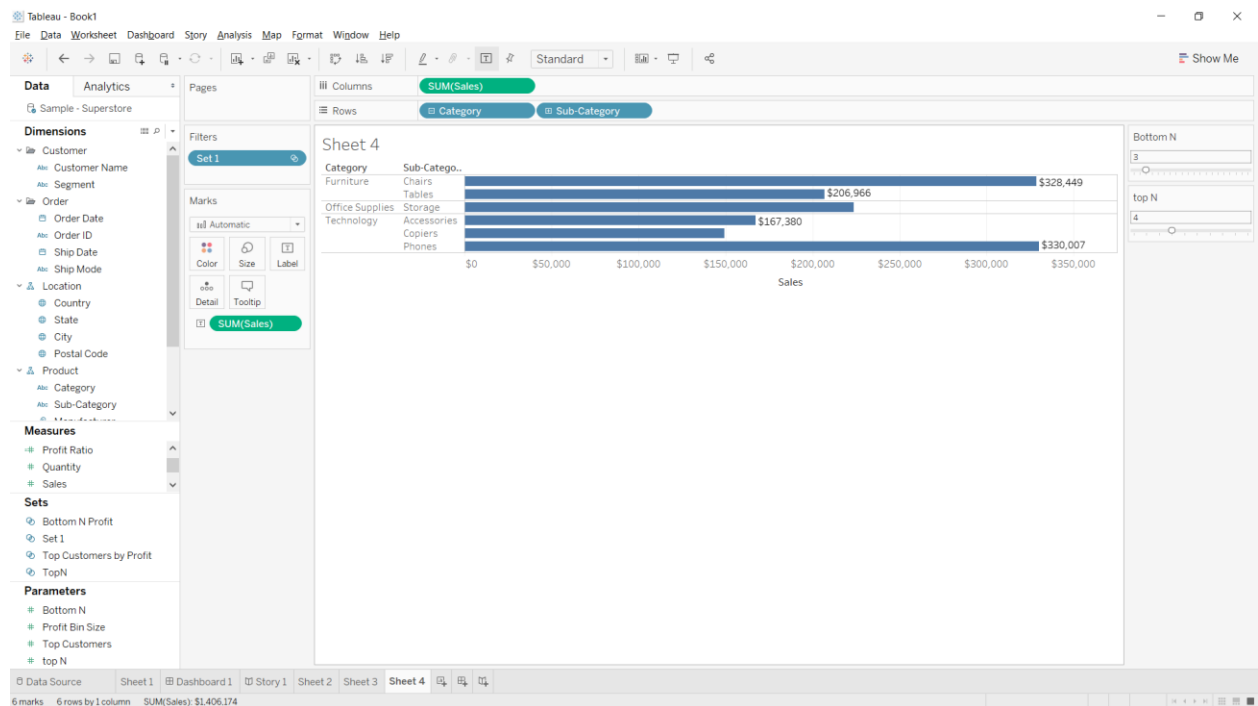

- **Interpretation:** By creating such parameters and sets this way, we can obtain top and bottom entries from the dataset.

4. Make an interactive treemap with the help of filters reflected on region-wise profit.

- Create a new worksheet and rename it as Tree Map.
- Drag and drop 'category', 'sub category' and 'profit' on labels in marks card.
- Drag and drop 'profit' on size in marks card.
- click on region and select show filter

- A legend will get generated in the right side of the worksheet from where you can select region wise you want to observe its sales.
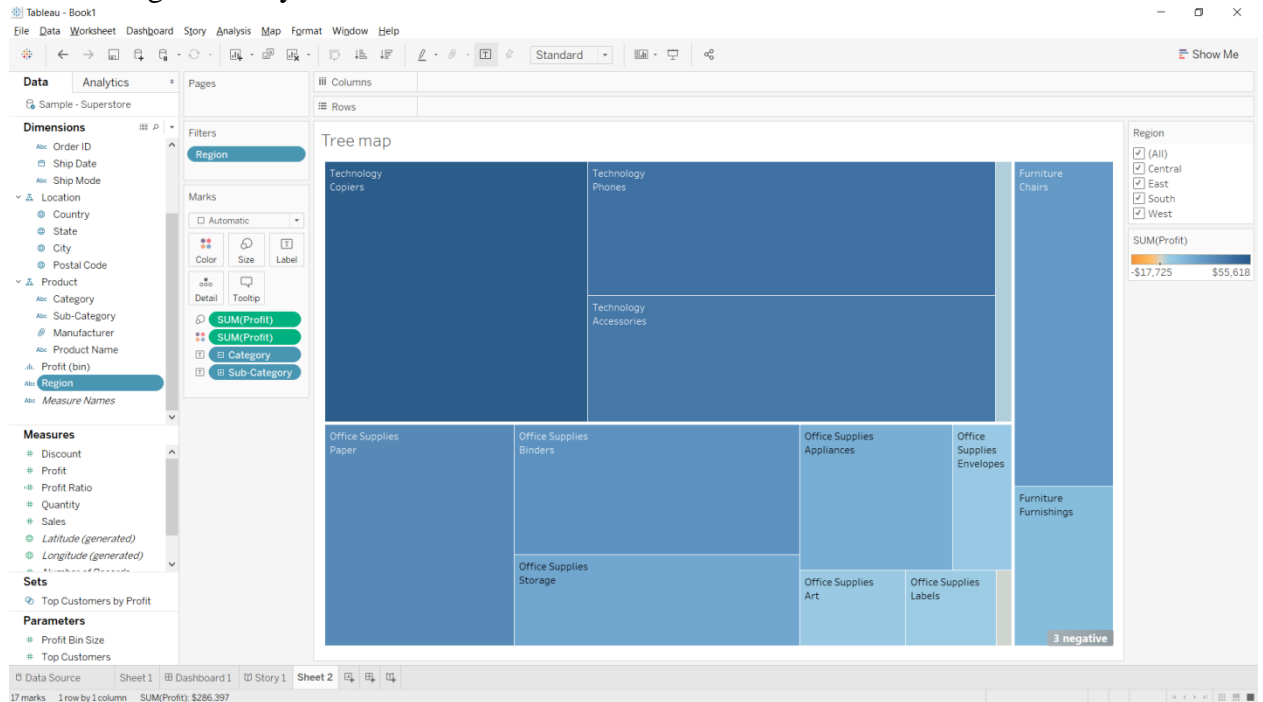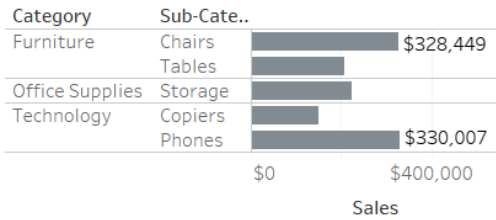

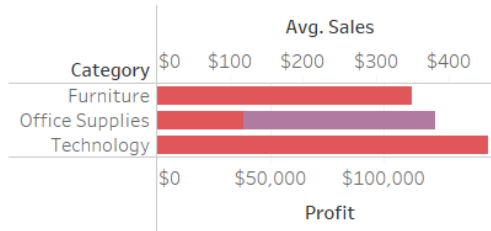**Interpretation:** This way, an interactive tree map can be obtained

Formatting:
- Create 3 new Dashboards and rename them as 'Sales-Category', 'Country Sales' and 'Top-Bottom& Tree'.
- On first dashboard, drag and drop and the two sheets 'source1' and 'destination1'.
- On the top-right corner of the source1 sheet you will find a 'funnel' shape button, on clicking thatbutton, by using it source1 will become a filter for destination1.

- Open 2nd dashboard, drag and drop the two sheets 'source2' and 'destination2'.
- Similarly, here also you can use 'source2' sheet as filter for 'destination2', so it will highlight theinformation in destination2 accordingly.

- Open 3rd dashboard and drag and drop and the two sheets 'Top-Bottom' and 'tree'.

- This dashboard will also have legends to highlight the information as per your choice
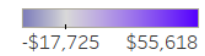
Sheet 4

Category	Sub-Cate..		
Furniture	Chairs		$328,449
	Tables		
Office Supplies	Storage		
Technology	Copiers		
	Phones		$330,007

$0 $400,000

Sales

Sales 1

Avg. Sales

Category	$0	$100	$200	$300	$400
Furniture					
Office Supplies					
Technology					

$0 $50,000 $100,000

Profit

Tree map

Technology Copiers	Technology Phones	Technology Accessories
Office Supplies Paper	Office Supplies Binders	Office Supplies
	Office Supplies	3 negative

Sales 2

Category	Sub-Catego..	Profit	Avg. Sales
Furniture	Bookcases		
	Chairs		
	Furnishings		
	Tables		
Office Supplies	Appliances		
	Art		
	Binders		
	Envelopes		
	Fasteners		
	Labels		
	Paper		
	Storage		

$0 $50,000 $0

Profit   Avg. Sales

Bottom N

2

top N

4

Measure Names
- Avg. Sales
- Profit

Region
- ☑ (All)
- ☑ Central
- ☑ East
- ☑ South
- ☑ West

Profit

-$17,725 $55,618