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| **Memorandum** | E:\Users\bergg\Documents\My Templates\Word\Accountancy\Accountancy\Accountancy_color_h.png |

To: 4320 Students

From: Gary G. Berg

Date: May 17, 2025

Re: Assignment 5 – Aggregate and Visualize data types in Tableau

* This assignment is a modification of **assignment four** using Tableau and is **your opportunity to master the data**
* **This assignment duplicates pivot table and chart(s) created in assignment four**
* Required:
  + Download the Excel file for this assignment.
  + Tableau may treat some fields as measures when they should be treated as dimensions. If needed, convert the field(s) in question to dimensions.
  + In the data source, convert the state field from text to a geographic field
  + Use appropriate count where applicable
* Requirements
  + Sheets one
    - Duplicate the pivot table 1 (**Product**) from your excel assignment. Show the appropriate total(s)
  + Sheet two
    - Create a column chart for sheet one (**show mark labels**)
  + Sheet three
    - Duplicate the pivot table 2 (**Customer**).
  + Sheet four
    - Duplicate the pivot table 3 (**Employee**)
  + Sheet five
    - Create a column chart for sheet four (**show mark labels**)
  + Sheet six
    - Duplicate the pivot table 4 (**Year**)
    - Show the appropriate subtotal(s)/ total(s)
  + Sheet seven (**master the data**)
    - Create a filled geographic visualizing of total dollar sales by state (show mark labels)
    - Add the ability to filter by year and/or product description (show filters)

1. To save your work, go to file > save as to save the file as a **twbx** (tableau packaged workbook) file.
   1. Failure to save file as twbx will result in **grade of zero**
2. Additional Note: Make sure you submit the **twbx** file and not the temp file that is created when you are in Tableau
   1. The temp file is erased when you exit Tableau, but there may be a delay before that happens
      1. Temp files have an extension of **twbr**
3. **Submit the completed Tableau .twbx file via the D2L dropbox.**: (You are not submitting screenshots)
   1. **Failure to submit as a twbx file will result in a grade of ZERO**
   2. **Files submitted to the wrong dropbox will receive a grade of 0**
   3. **Failure to follow directions will result in a grade of ZERO**
4. This is **not a** group assignment. Students should work independently.
   1. **Copying/plagiarism** will result in a **grade of 0** for all parties involved.
5. **Due on 09-24-2024, 11:30 p.m.**
6. **Remember, file must be virus free**. (**Any assignment received containing a Virus receives a grade of 0)**