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

To: 4320 Students

From: Gary G. Berg

Date: February 27, 2024

Re: Assignment 9 – Tableau visualizations and crosstabs

* This assignment uses the lab 5-1 data file
* Download the data file
* Note:
  + When you connect to the Excel file, there are several fields that may be in the measure names section that should be converted to a dimension.
* Required:
  + Convert the appropriate fields if needed to a dimension (I will not tell you the fields that need to be converted)
  + Create the following in Tableau
    - sheet 1 -Bar graph showing number of companies, total assets, total Revenue and total net income(loss) by SIC code. (Sort on total assets descending and show mark labels)
    - sheet 2 - Duplicate this bar graph as a crosstab(show appropriate totals)
    - sheet 3 - Crosstab **showing all companies** in a particular SIC code group, showing total revenue, total net income(loss) with ability to filter by SIC code and fiscal year(s). Show appropriate totals/subtotals
      * Test your filer for this crosstab, using companies in the SIC code that contains Costco.
      * Show the filter
    - Sheet 4 – Create a bar graph for sheet three with ability to filter by SIC code and fiscal year(s). Show mark labels

1. To save your work, go to file > save as to save the file as a **twbx** (tableau packaged workbook) file.
2. **Additional Note: Make sure you submit the twbx file** and not the temp file that is created when you are in Tableau
   1. Failure to submit the twbx will result in **grade of zero**
   2. 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. Files submitted to the wrong dropbox will receive a **grade of 0**
   2. **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 03-03-2024, 11:30 p.m.**
6. **Remember, file must be virus free**. (**Any assignment received containing a Virus receives a grade of 0)**