**User Guide: Stakeholder Insights and Performance Dashboard (Tableau)**

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**Purpose:**

The dashboard provides a comprehensive view of key business metrics and data insights related to stakeholders, insurers, and policy performance. It enables stakeholders to analyse premium trends, profitability, and asset distribution to make data-driven decisions.

**Requirements & Functionalities**

**1. Charts and Visualizations:**

* **Compare the total value created by different insurers** → Bar charts for comparative analysis.
* **Display trends in premiums collected over time** → Line or area charts to analyse premium growth.
* **Showcase the distribution of shareholding patterns among stakeholders** → Pie or bar charts.
* **Analyse the relationship between cost ratio and profitability** → Scatter plots to show correlations.
* **Visualize profitability for different cities and policy tenure durations** → Heatmaps or bar charts.
* **Represent the distribution of assets under management across stakeholders** → Tree maps or bar charts.

**2. Key Performance Indicators (KPIs):**

* **Total premium collected** → KPI card displaying the overall premium amount.
* **Average age of stakeholders** → KPI card summarizing stakeholder age.
* **Total Value Created for insurers or stakeholders (Equity-based Assets under Management)** → KPI representation.
* **Highest value created by a single insurer** → KPI card for top-performing insurer.

**3. Filters & Interactivity:**

* **Filters:**
  + City-wise data filtering.
  + Stakeholder-based filtering.
  + Policy tenure range slider.
  + Date range selection.
  + Gender-based demographic filtering.
* **Interactivity:**
  + Clicking on charts dynamically filters other visuals.
  + Hover tooltips display detailed information.
  + Filters and KPIs update in real-time.

**4. Export Options:**

* **PDF Export Button:**
  + Export the dashboard as a professional PDF report.
  + Captures all visible charts, KPIs, and applied filters.
  + Includes a light watermark with company branding.

**5. User Access & Security:**

* **Role-based access:**
  + Different user roles determine data visibility levels.
  + Example: Insurers, stakeholders, and policy managers have specific access.

**Usage Instructions**

**Navigating the Dashboard:**

1. Use the filters on the top/side panel to refine data based on city, tenure, stakeholder, or gender.
2. Click on chart elements to dynamically filter related visuals.
3. Hover over any chart to see detailed insights via tooltips.

**Exporting Data:**

1. Click on the **Export to PDF** button in the toolbar.
2. Confirm the export settings (filters, selections applied, etc.).
3. The generated PDF will include all selected dashboard elements.

**Accessing Role-Specific Data:**

1. Log in using assigned credentials.
2. Based on the assigned role, different sections of the dashboard will be visible.