

Step 1: Data Source connection and Blending

The screenshot shows the Tableau Public interface. On the left, the 'Connections' pane lists 'Global Financial...base - Jul2018' and 'Insurance Sample Dataset'. The 'Sheets' pane shows 'Insurance Indicators'. The main view displays a 'Join' dialog box for 'Data - July 2018' and 'Insurance Indicators'. The join type is set to 'Inner'. The fields being joined are 'CountryName' and 'CountryCode'. Below the dialog, a preview table shows the resulting data.

Name	CountryCode	CountryName	Region	Income	Year	Bank accounts per 1,000...
AFG	AF	Afghanistan	South Asia	Low income	1960	null
AFG	AF	Afghanistan	South Asia	Low income	1961	null
AFG	AF	Afghanistan	South Asia	Low income	1962	null
AFG	AF	Afghanistan	South Asia	Low income	1963	null
AFG	AF	Afghanistan	South Asia	Low income	1964	null
AFG	AF	Afghanistan	South Asia	Low income	1965	null
AFG	AF	Afghanistan	South Asia	Low income	1966	null

Step 2: Create Calculative fields and parameters

Fields

The 'Describe Field' dialog for 'Growth%' shows the following details:

- Role:** Continuous Measure
- Type:** Calculated Field
- Status:** Valid

Formula

```
AVG ([SelectedYYYY]) - AVG ([PreviousYYYY])
```

The domain for this field has not been loaded. Click "Load" to retrieve.

The 'Describe Field' dialog for 'GrowthIndicator' shows the following details:

- Role:** Discrete Measure
- Type:** Calculated Field
- Locale:**
- Sort flags:** Case-sensitive
- Status:** Valid

Formula

```
IF [Growth%]> 0.0001 THEN "Positive"  
ELSEIF [Growth%]< 0.0001 THEN "Negative"  
ELSE "No Change"  
END
```

Describe Field

PreviousYYYY

Role:

Type:

Default aggregation:

Status:

Continuous Measure

Calculated Field

Sum

Valid

Formula

IF INT([Year1])= YEAR([Select YYYY])-1 THEN [SelectedCategory]
END

The domain for this field has not been loaded. Click "Load" to retrieve.

Describe Field

SelectedCategory

Role:

Type:

Default aggregation:

Status:

Continuous Measure

Calculated Field

Sum

Valid

Formula

case [SelectedCategory]
when 1 then [Life insurance share]
when 2 then [Market share > Total]
when 3 then [Penetration > Total]
when 4 then [Ratio of reinsurance accepted > Total]
when 5 then [Retention ratio > Total]
END

The domain for this field has not been loaded. Click "Load" to retrieve.

Describe Field

SelectedYYYY

Role:

Type:

Default aggregation:

Status:

Continuous Measure

Calculated Field

Sum

Valid

Formula

IF INT([Year1])=YEAR([Select YYYY])THEN [SelectedCategory]
END

The domain for this field has not been loaded. Click "Load" to retrieve.

Parameters

Describe Field

SelectCategory

Role:

Continuous Measure

Type:

Parameter (Integer List)

Value:

Life Insurance Share

Allowed Values:

Life Insurance Share, Market Share, Penetration, Ratio of Reinsurance Accepted or Retention Ratio

Status:

Valid

Describe Field

Select YYYY

Role:

Continuous Measure

Type:

Parameter (Date List)

Value:

2012

Allowed Values:

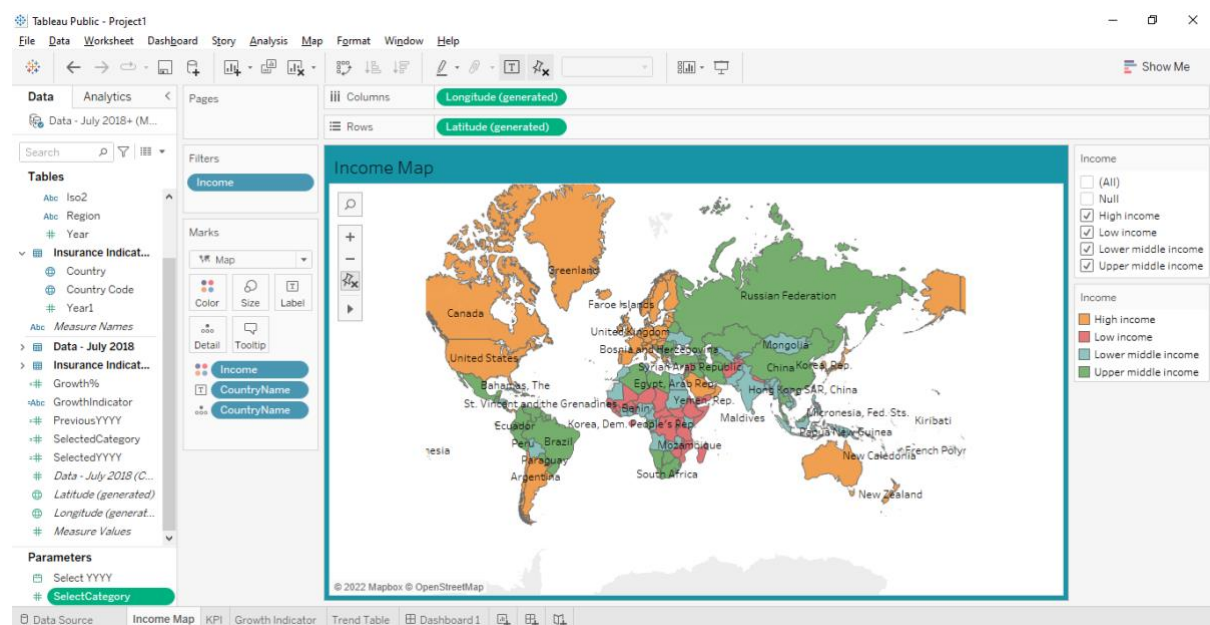
2006, 2007, 2008, 2009, 2010 or 6 more

Status:

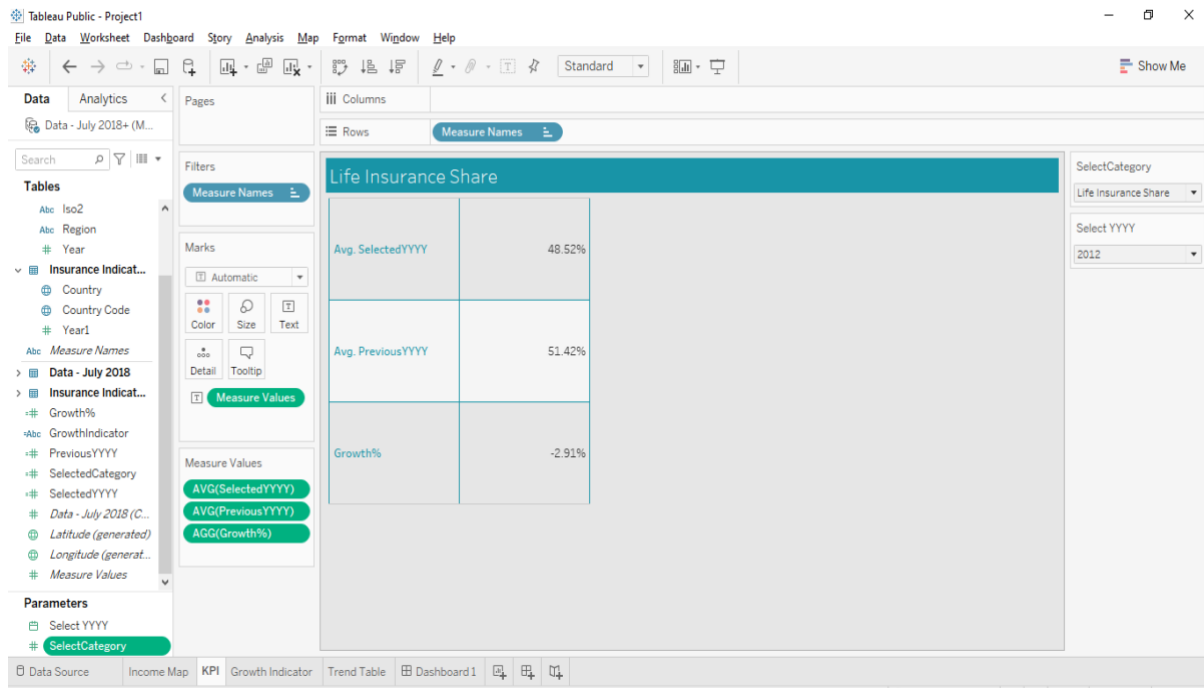
Valid

Step 3: Create four (4) worksheets

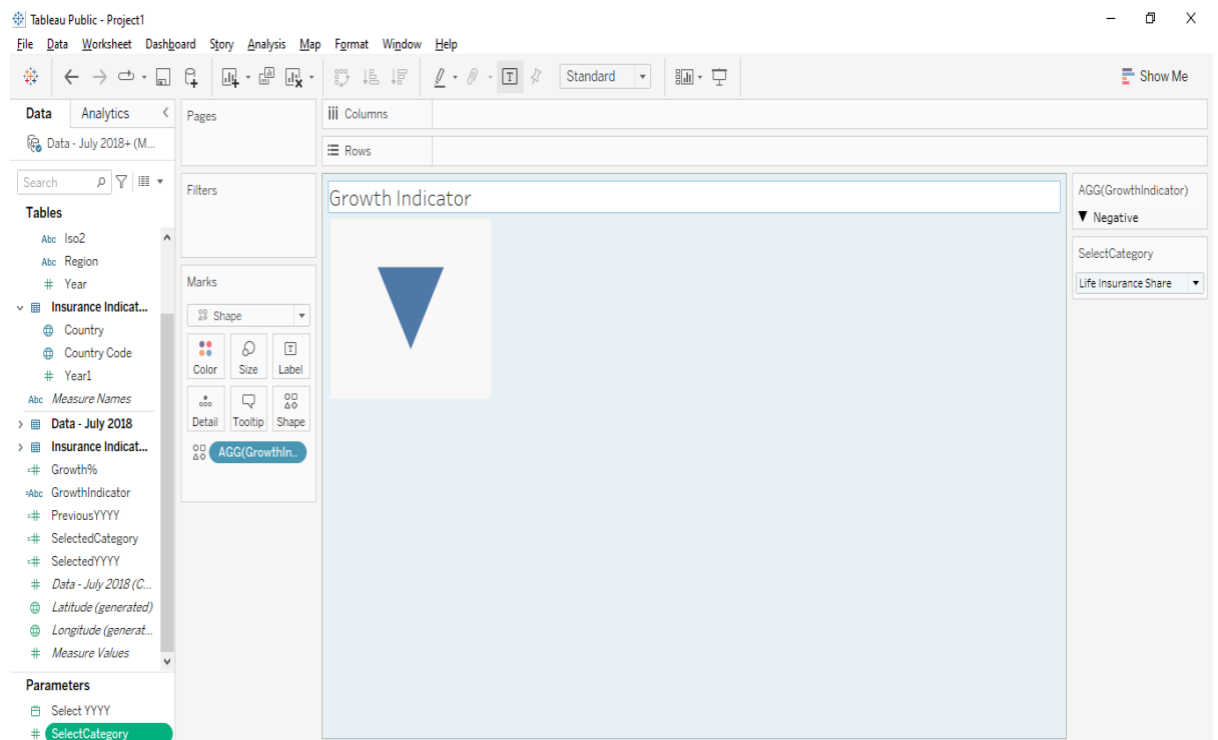
Income MAP



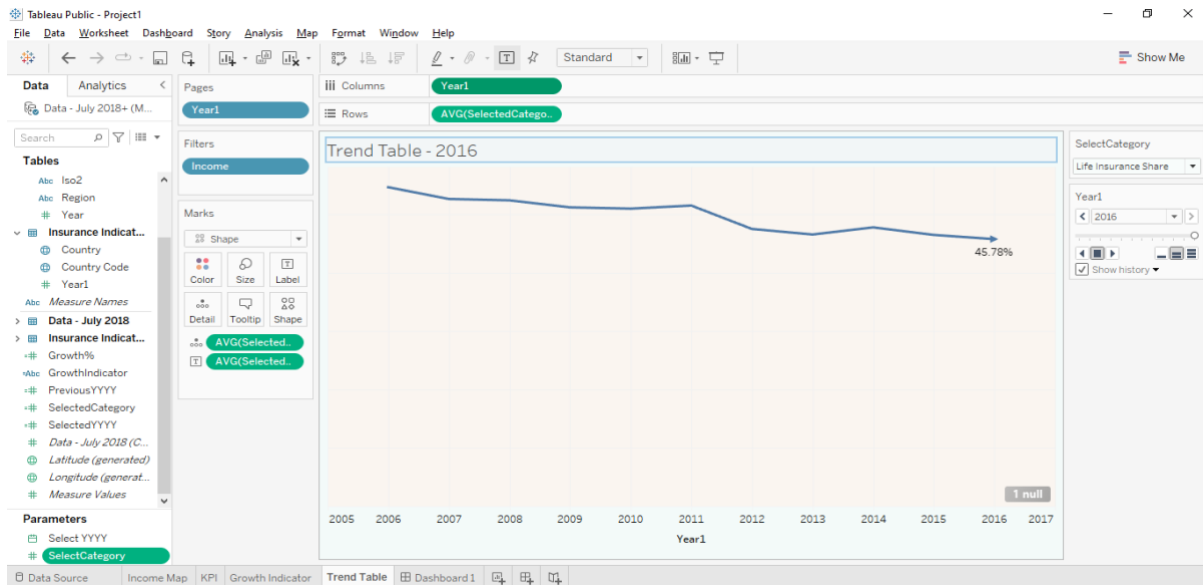
KPI



Growth Indicator



Trend Table



Dashboard

