



COMPARATIVE STUDY OF COUNTRIES

NEETHU KRISHNA



Step 1: Open Tableau

Step 2: On the home page Click Connect then click Microsoft Excel.

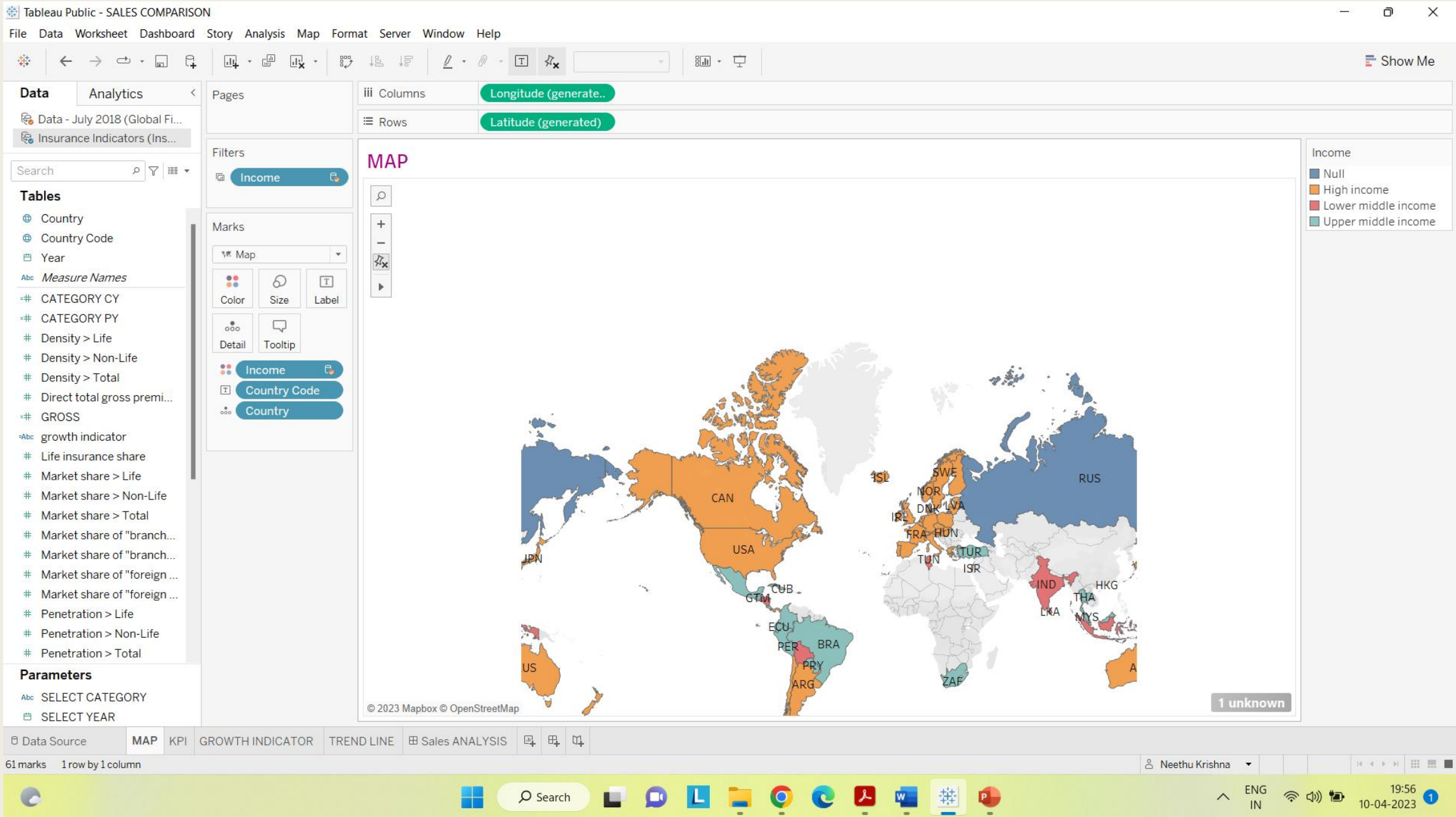
Step 3: Connect to the Global Financial Development Database - Jul2018 Excel file.

Step 4: Drag and drop Data July 2018 tables to the canvas area.

Step 5: Then Connect Insurance Sample Dataset Excel file.

Step 6: Go to **sheet 1 rename as MAP** add country to detail income to colour and country code to text,

Change automatic to map.



Step 7: Create **Sheet 2 Rename as KPI**. Create two parameters SELECT CATEGORY AND SELECT YEAR.

Edit Parameter [SELECT CATEGORY]

Name: SELECT CATEGORY

Properties

Data type: String | Display format: Life Insurance Share

Current value: Life Insurance Share | Value when workbook opens: Current value

Allowable values

☐ All ☒ List ☐ Range

Value	Display As
Life Insurance Share	Life Insurance Share
Market Share	Market Share
Penetration	Penetration
Ratio of Reinsurance	Ratio of Reinsurance
Retention Ratio	Retention Ratio
Click to add	

☒ Fixed ☐ When workbook opens

Add values from ▼

Remove Selected

Cancel OK

Edit Parameter [SELECT YEAR]

Name: SELECT YEAR

Properties

Data type: Date | Display format: 2009

Current value: 01-01-2009 | Value when workbook opens: Current value

Allowable values

☐ All ☒ List ☐ Range

Value	Display As
01-01-2006	2006
01-01-2007	2007
01-01-2008	2008
01-01-2009	2009
01-01-2010	2010
01-01-2011	2011
01-01-2012	2012

☒ Fixed ☐ When workbook opens

Add values from ▼

Remove Selected

Cancel OK

Create calculated field Select category cf, category cy(Current year) , category py(Previous year) and growth.

select category cf

Insurance Indicators (Insurance Sample Dataset)

```
CASE [SELECT CATEGORY]
WHEN "Life Insurance Share" THEN [Life insurance share]
WHEN "Market Share" THEN [Market share > Total]
WHEN "Penetration" THEN [Penetration > Total]
WHEN "Ratio of Reinsurance" THEN [Ratio of reinsurance]
WHEN "Retention" THEN [Retention ratio > Total]
END
```

The calculation is valid.

8 Dependencies

Apply

OK

CATEGORY CY

Insurance Indicators (Insurance Sample Dataset)

```
IF YEAR([Year])=YEAR([SELECT YEAR])
THEN [select category cf]
END
```

The calculation is valid.

5 Dependencies

Apply

OK

CATEGORY PY

Insurance Indicators (Insurance Sample Dataset)

```
IF YEAR([Year])=YEAR([SELECT YEAR])-1
THEN [select category cf]
END
```

The calculation is valid.

5 Dependencies

Apply

OK

GROWTH

Insurance Indicators (Insurance Sample Dataset)

```
AVG([CATEGORY CY])-AVG([CATEGORY PY])
```

The calculation is valid.

4 Dependencies

Apply

OK

Drag Measure Names to Row and filter it to Category CY , Category PY , Growth. And Measure Values to Text Mark card

Tableau Public - SALES COMPARISON

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Standard

Show Me

Data Analytics

Data - July 2018 (Global Fi...
Insurance Indicators (Ins...

Search

Tables

- Country
- Country Code
- Year
- Measure Names
- CATEGORY CY
- CATEGORY PY
- Density > Life
- Density > Non-Life
- Density > Total
- Direct total gross premi...
- GROWTH
- growth indicator
- Life insurance share
- Market share > Life
- Market share > Non-Life
- Market share > Total
- Market share of "branch...
- Market share of "branch...
- Market share of "foreign ...
- Market share of "foreign ...
- Penetration > Life
- Penetration > Non-Life
- Penetration > Total

Parameters

- SELECT CATEGORY
- SELECT YEAR

Pages

Columns

Rows

Measure Names

Filters

- Measure Names
- Income
- Action (Count...

Marks

Automatic

Color Size Text

Detail Tooltip

Measure Values

SUM(CATEGORY PY)

SUM(CATEGORY CY)

AGG(GROWTH)

Life Insurance Share

Average Comparison Period Value	0.3976
Average Current Period Value	0.3936
Growth average	-0.0040

SELECT CATEGORY

Life Insurance Share

SELECT YEAR

2009

Data Source MAP KPI GROWTH INDICATOR TREND LINE Sales ANALYSIS

3 marks 3 rows by 1 column SUM of Measure Values: 0.7872

Neethu Krishna

20:05 10-04-2023

SHEET 3- GROWTH INDICATOR

Step 8: Create calculated field growth indicator. Click on show parameter option.

Insurance Indicators (Insurance Sample Dataset) X

```
IF [GROWTH] >0 THEN "→ "  
ELSEIF [GROWTH]=0 THEN "↔"  
ELSEIF [GROWTH]<0 THEN "←"  
ELSEIF [GROWTH]= NULL THEN "None"  
END
```

The calculation is valid. 2 Dependencies ▾

Step 9: click and drag select category calculated field to rows and years to columns. Also add years to pages . Select the show history and trails.



DASHBOARD-COMPARITIVE STUDY

STEP:10 Go to dashboard click and drag map, KPI, Trendline , Growth Indicator.

On format select actions add Hyperlink and Filter.

Edit URL Action

Name

Hyperlink1

Insert

Source Sheets

COMPARATIVE STUDY

GROWTH INDICATOR

KPI

MAP

TREND LINE

Run action on

Hover

Select

Menu

URL Target

New Tab if No Web Page Object Exists

New Browser Tab

Web Page Object

en.wikipedia.org

URL

https://en.wikipedia.org/wiki/<Country>

Insert

https://en.wikipedia.org/wiki/Argentina

> Data Values

Cancel

OK

Edit Filter Action

Name

Filter1

Insert

Source Sheets

COMPARATIVE STUDY

GROWTH INDICATOR

KPI

MAP

TREND LINE

Run action on

Hover

Select

Menu

Single-select only

Target Sheets

COMPARATIVE STUDY

GROWTH INDICATOR

KPI

MAP

TREND LINE

Clearing the selection will

Keep filtered values

Show all values

Exclude all values

Filter

All fields

Selected fields

Source Field	Target Data Source	Target Field
Click to add		

Remove

Cancel

OK

Then click on Select Income Filter -> More options -> Apply to Worksheets -> Selected worksheet

Select and drag web page from Objects.

