



PayLOCATOR

Project Week 6 – Tableau



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DESCRIPTION OF THE DATASET



Theme: Money transfer

-Data shape: 90 rows and 11 columns

-11 columns: 'Debtor', 'Creditor', 'Type', 'Reference', 'Initial Amount', 'Currency', 'Bank', 'Charges', 'Date', 'Time (local)', 'Status'

Process



1

**Define tasks
and steps on
Trello**



2

**Define KPIs
(with user
stories) and
their
visualization**



3

**Analyze the
dataset and
understand the
logic of the
money transfer**



4

**Import
dataset in
Tableau and
create**



5

**Adapt the
whole design
to the
corporate
color of the
product**



CHALLENGES



- Understand the Dataset
- Work on several files and sheets
- Choose when to use Excel/ Tableau
- Choose 5 pertinent additional KPIs
- Write 12 user stories
- Use tableau for some KPIs
- Choose the Colors and Organize The Dashboards

Learning and Improvements



01

Better understanding of Tableau and Excel

02

Even if a dataset is short , it might need some manipulations .

03

User stories help to understand how our KPI provide value for PayLocator

04

Forecasting and Data transforming in Tableau



HIGHLIGHTS



**Extensions and
Animations in Tableau**



2 Dashboards



Tableau Forecasting

THANK YOU

