

Tableau Project

Step 1: Open **Tableau 10.x**

Step 2: On the home page, under **Connect**, under **to a file**, click **Excel**.

Step 3: Browse and 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: Click on Add button to connect **Insurance Sample Dataset** Excel file.

Tableau Public - Assignment1_16243749040030

File Data Window Help

Connections Add

- Insurance Sample Dataset (Microsoft Excel)
- Global Financial Development Database - Jul2018 (Microsoft Excel)

Sheets

- Use Data Interpreter (Data Interpreter might be able to clean your Microsoft Excel workbook.)
- Data - July 2018
- Definitions and Sources

New Union

Insurance Indicators

Need more data? Drag tables here to relate them. [Learn more](#)

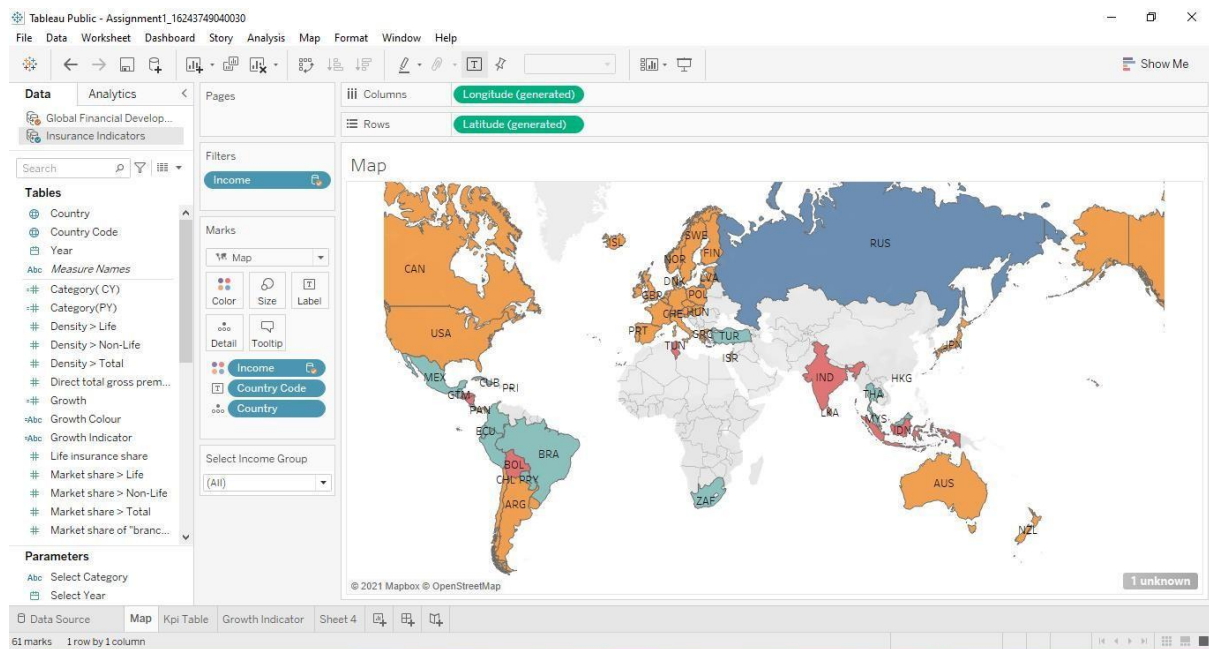
Sort fields: Data source order Show aliases Show hidden fields 505 rows

Insurance Indicators	Insurance Indicators	Insurance Indicators	Insurance Indicators	Insurance Indicators	Insurance Indicators	Insurance Indicators	Insurance Indicators
Country Code	Country	Year	Life insurance share	Market share > Life	Market share > No...	Market share > To...	Market share of 'b...
ARG	Argentina	01-01-2012	0.206750	Null	Null	Null	0.01496
ARG	Argentina	01-01-2013	0.178410	Null	Null	Null	0.01835
ARG	Argentina	01-01-2014	0.165180	Null	Null	Null	0.03850
ARG	Argentina	01-01-2015	0.153080	Null	Null	Null	0.03210
ARG	Argentina	01-01-2016	0.159930	Null	Null	Null	0.03390
AUS	Australia	01-01-2006	0.576510	0.015000	0.010820	0.012890	0.00000
AUS	Australia	01-01-2007	0.619490	0.016880	0.012060	0.014650	0.00000
AUS	Australia	01-01-2008	0.594230	0.016400	0.012350	0.014470	0.00000

Data Source Map Kpi Table Growth Indicator Sheet 4

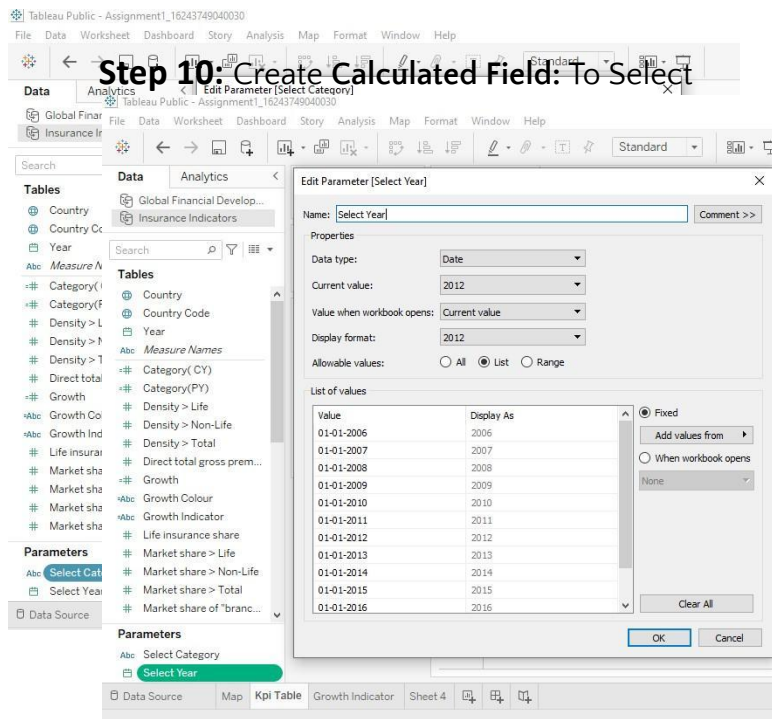
Step 6: Go to Sheet one and rename it as **MAP**.

STEP 7: To Create a **MAP**, drag **Country** from **Insurance Sample Dataset** and put on Detail Mark card and then go to automatic and click map. Then drag **Income** from **Global Financial Development Database** to filter and select all and click on show filter. Drag **Income** to Colour Mark Card and **Country Code** to text Mark card.



Step 8: Create 2 Parameters , One for **Select Year** and Another **Select Category**.

Step 9: To create Parameter go to Down key below Filter button in Data panel , And click on Create Parameter. For Year parameter click on Date datatype and for Select Category Click on String Data type.



Step 10: Create Calculated Field: To Select Category, Categorical CY(Current year) and Categorical PY(Previous Year), Growth %.

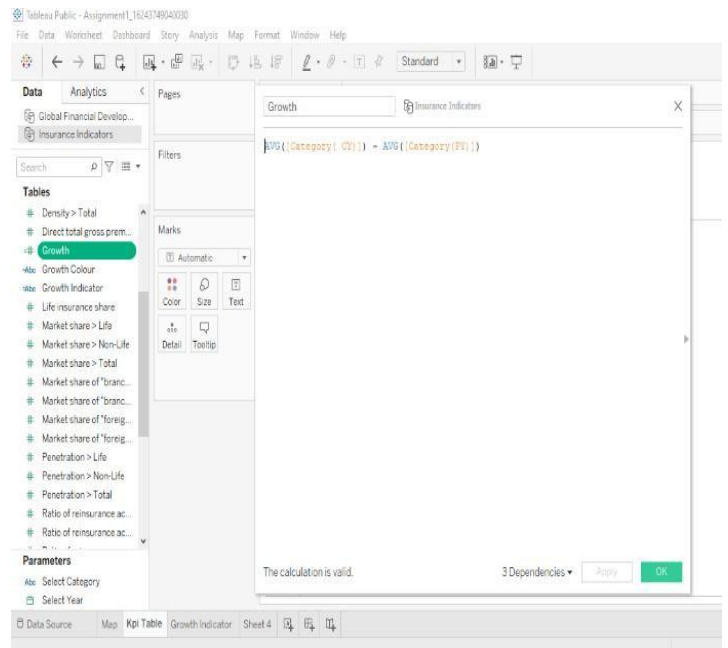
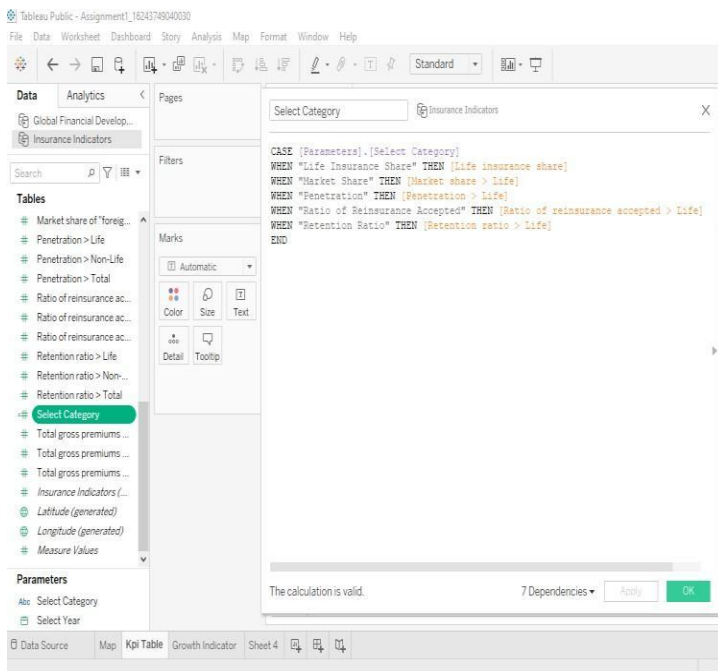
Click on Analysis Pane , and then Calculated Field and do calculations for the following.

Select Category is for : to Select Category Parameter

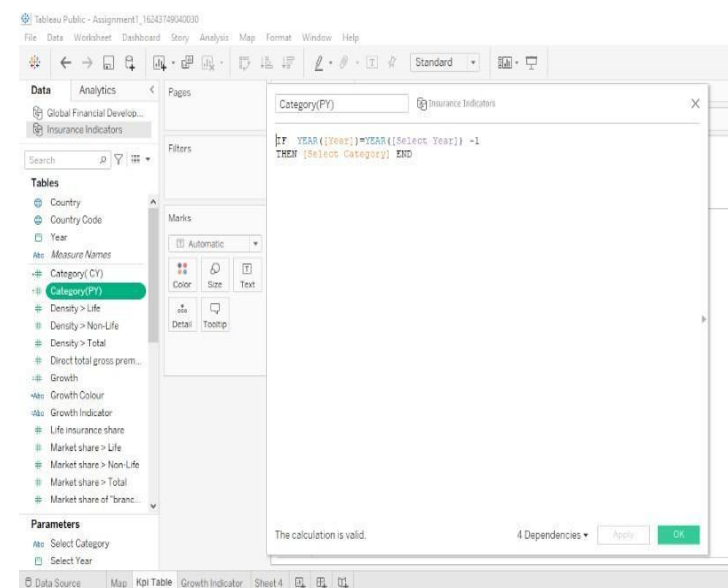
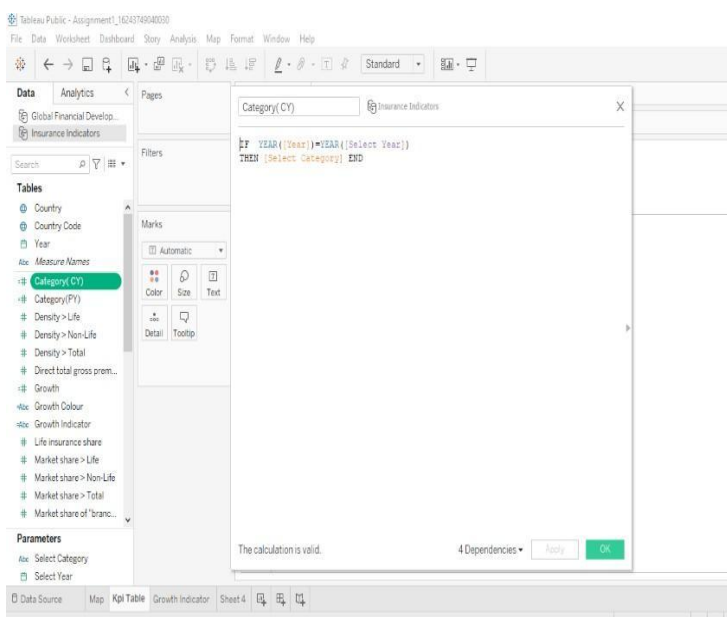
Categorical CY: Selected Period Value

Categorical PY : Comparison Period Value

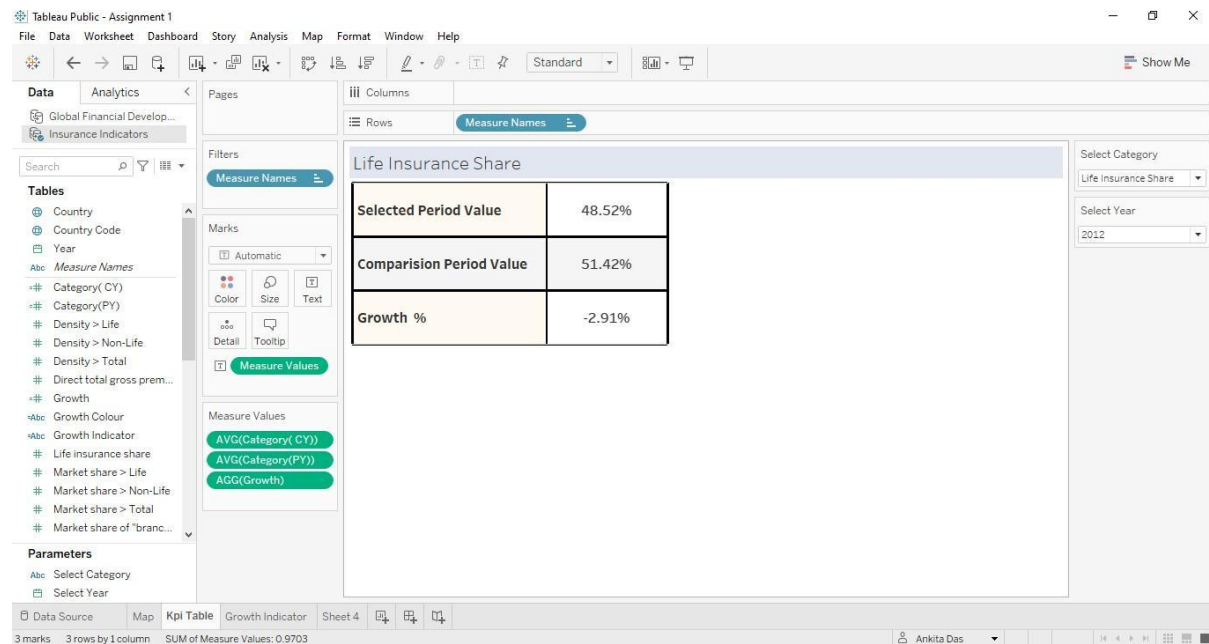
Growth : For Growth %



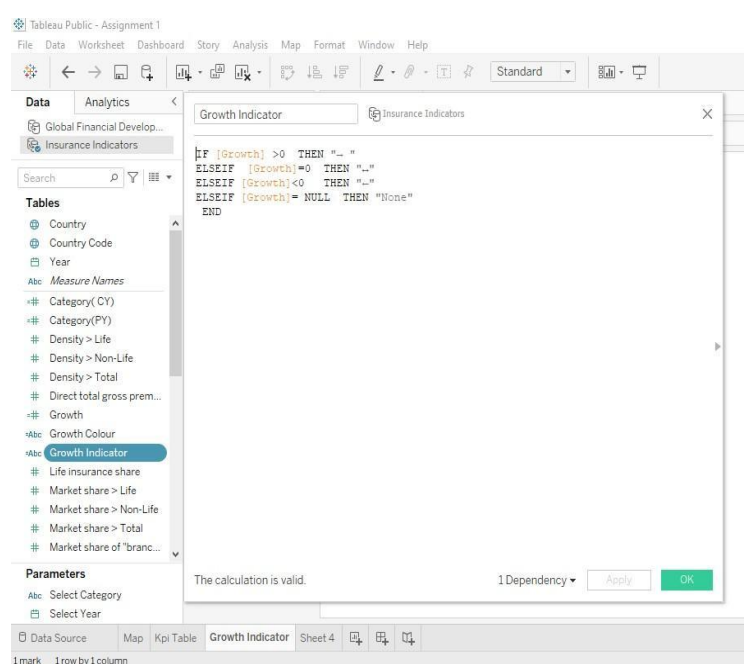
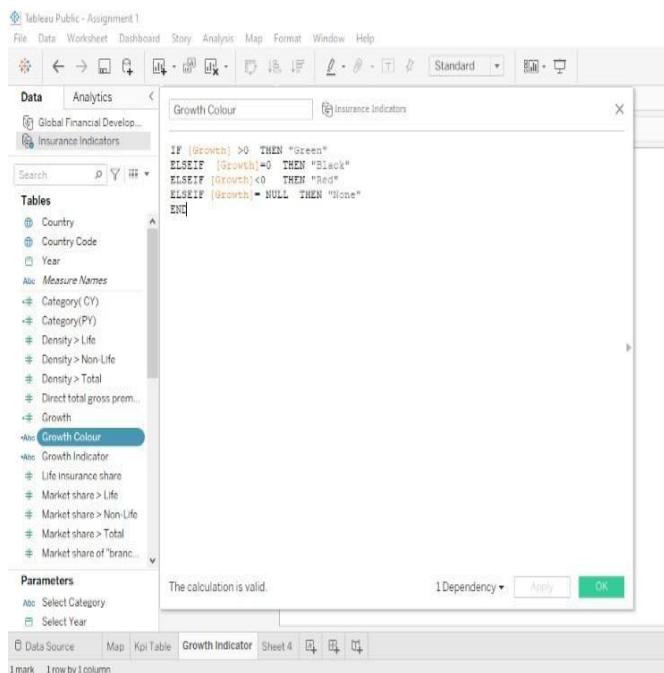
Step 11: Create a KPI Calculator: Go to new sheet and rename it KPI table and click on Sheet title and insert Select Category
Click on Parameters and Show Parameter.



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



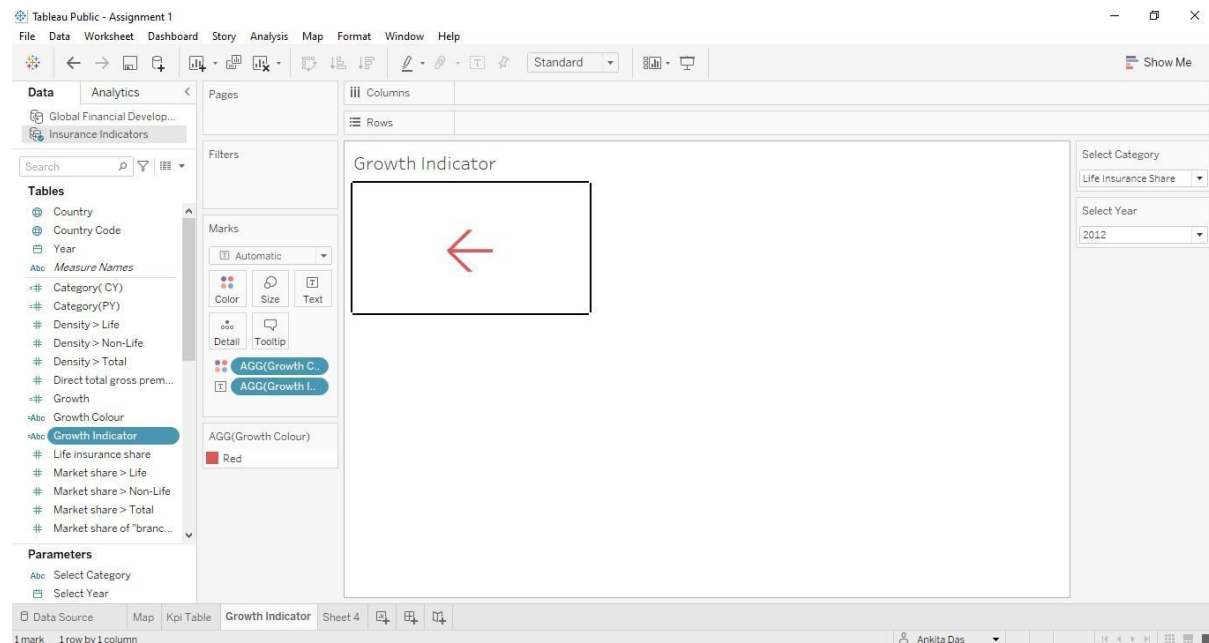
Step 12: To create a growth indicator:
Create 2 Calculated Field: Growth Colour and Growth Indicator:



Step 13: Growth Indicator Visualization : Go to New Sheet and rename it Growth Indicator

Click on Parameters and Show Parameter.

Drag Growth Colour to Colour and Growth Indicator To text.

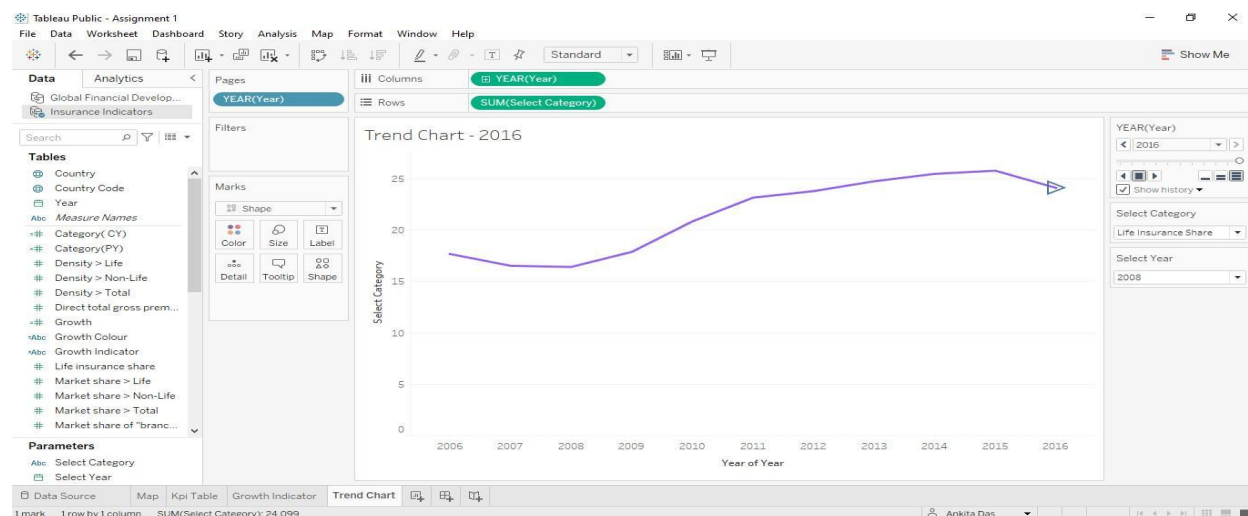


Step 12: To Create Trend Chart: Go to New sheet and rename it Trend Chart.

Click on Parameters and Show Parameter.

Drag Year to Columns and Select Category Measure to Rows.

Year to Pages [To make a Motion Chart] and click on Show history and Trails.



Step 14: Create a Dashboard: Click on Dashboard button .

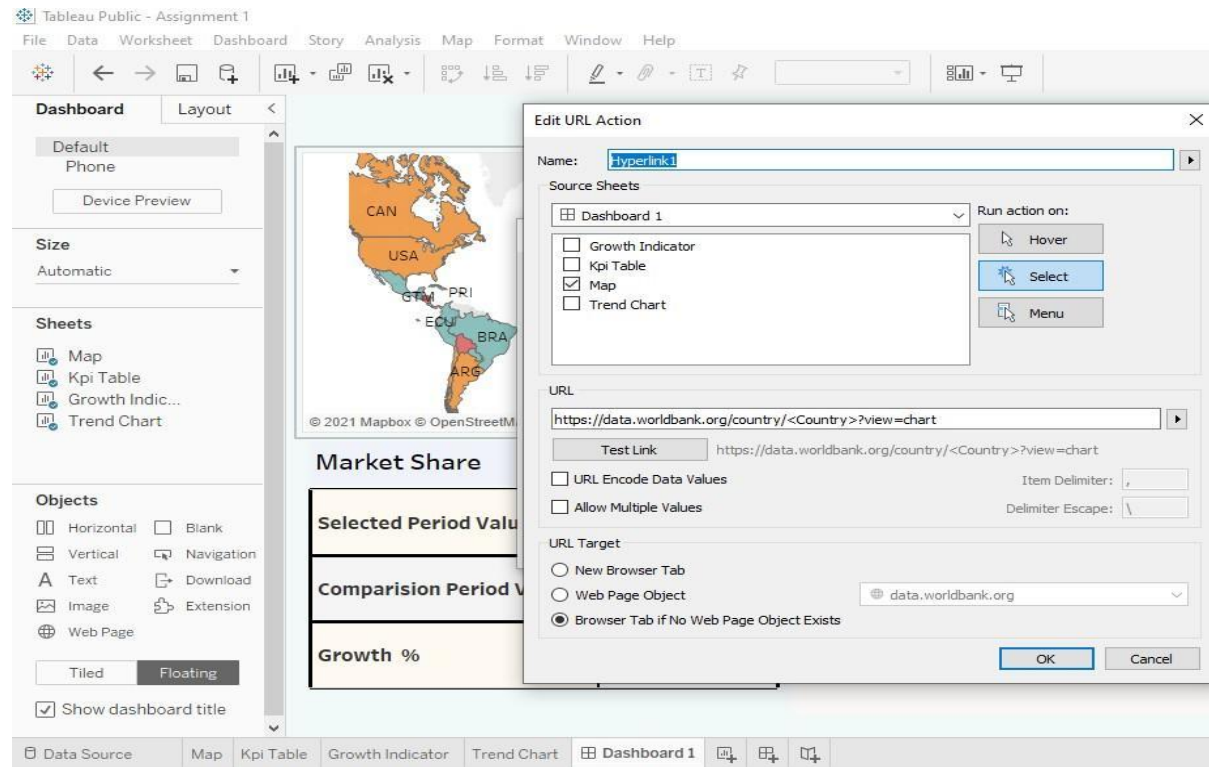
Go to Size and click Automatic.

Go to Objects and click on Horizontal, Then Vertical , and then Horizontal, Drag Map to sheet , From Objects drag web Page to sheet.

Then Go to Dashboard , Click Action -> add action -> go to URL -> edit action->

Source sheet -> Map and Run action -> Select

And add URL in URL bar.



Go to Object , the drag Horizontal Tab again.

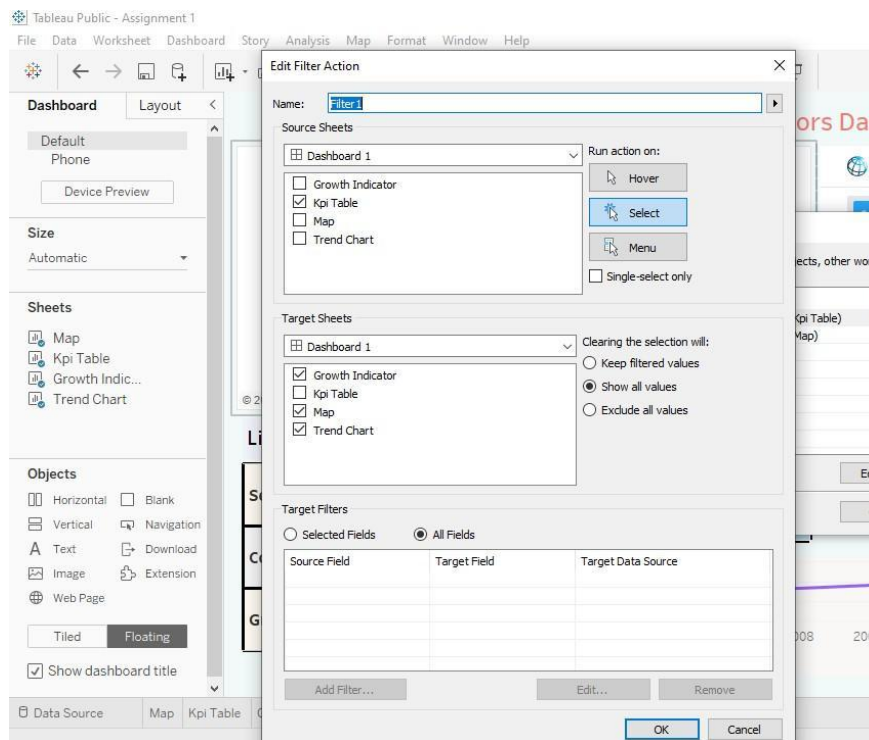
Click on Floating -> add KPI sheet, Growth Indicator sheet and Trend Chart sheet and rearrange it.

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

Then click on Dashboard -> click on actions -> add action -> filter-> edit filter -> source sheet -> KPI table

Target sheet-> All except KPI table

Run on action -> Click on Select.



Step 15: Dashboard ready to slideshow.

