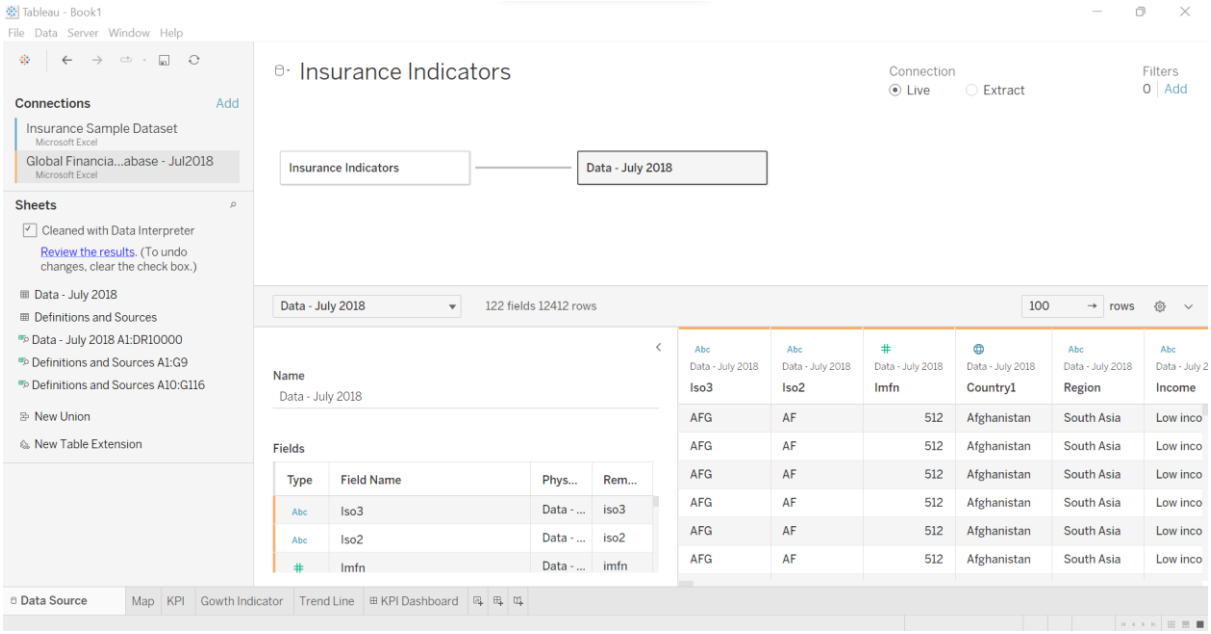
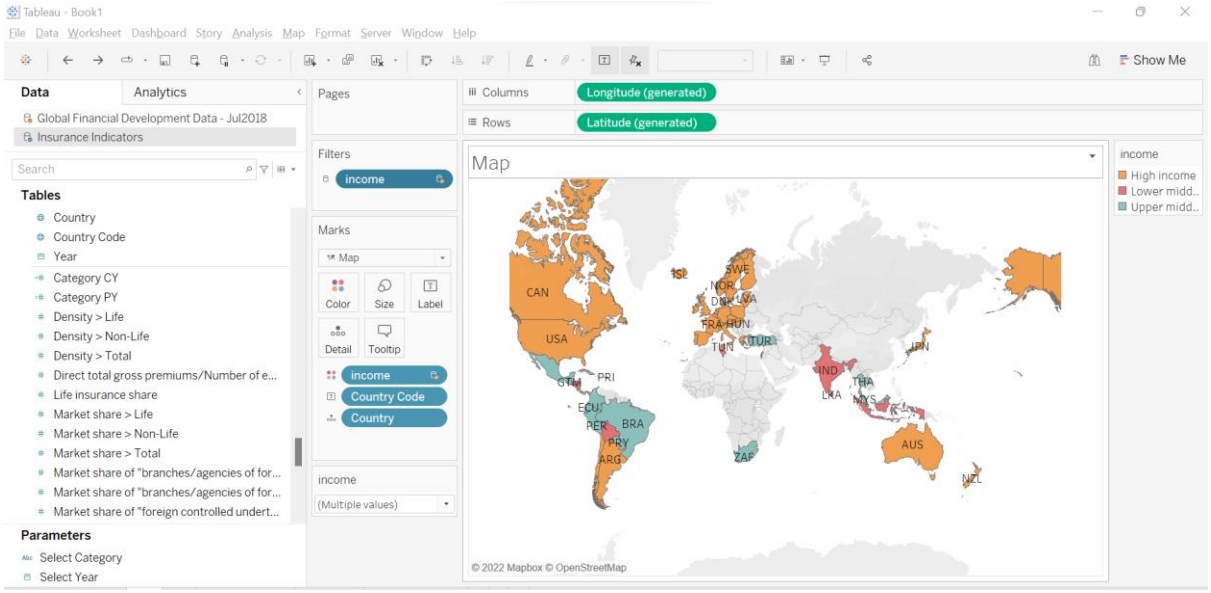
Comparative Study of Countries

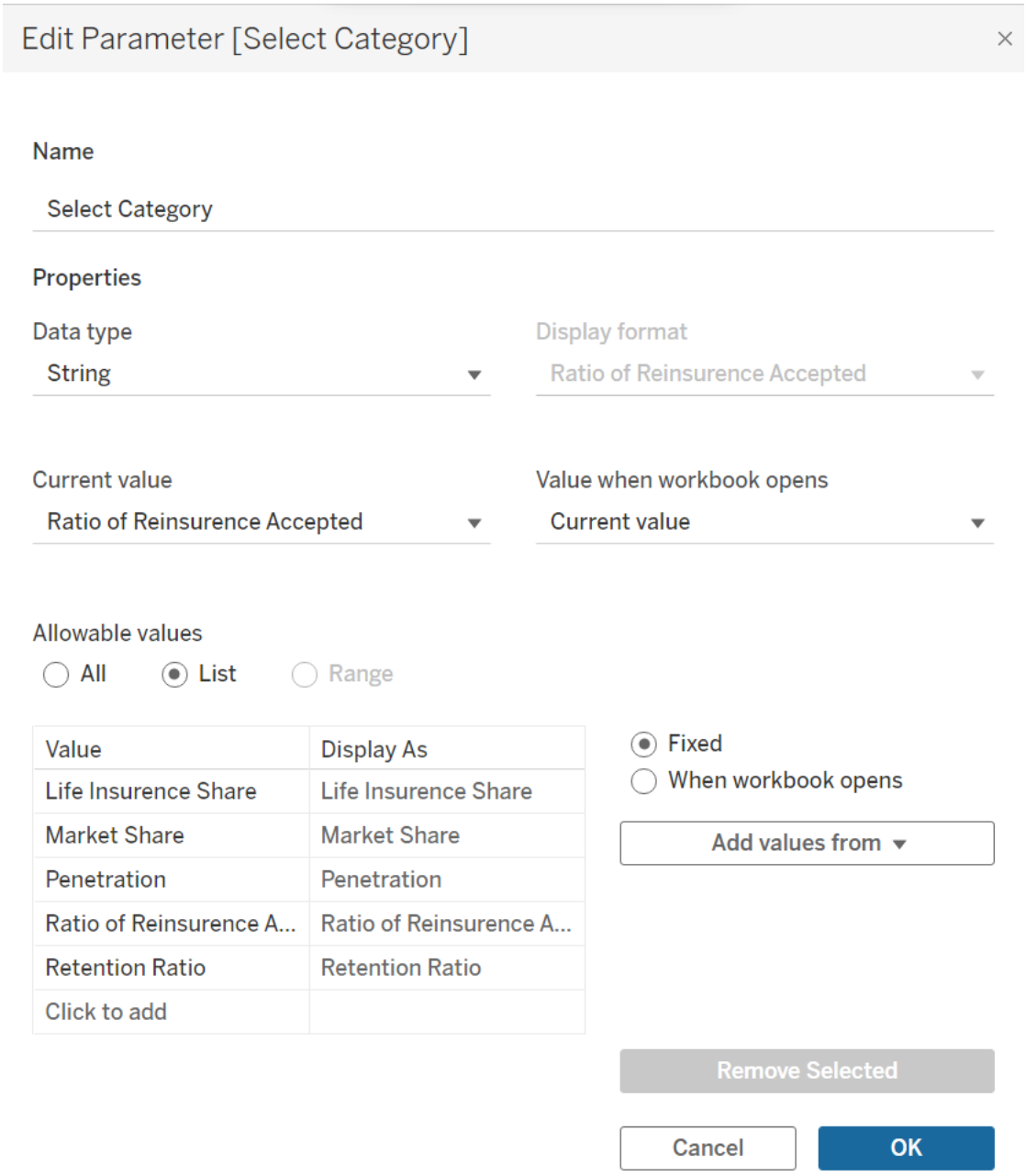
1. Open Tableau Desktop.
2. On starting page under Connect, click on Microsoft Excel to connect to a file. Select Insurance Sample Dataset file. Click on clean with data interpreter which cleans any blank cells in the file. Check for the columns and their correct data types. If any mismatching, rectify them buy clicking on the symbol of the field and choosing the correct data type. Click on Add button next to Connections to add another data source. Then select Global Financial Development Data and load it. Now there are two data sources linked to the sheet. Use country and country code to link the two data sources.



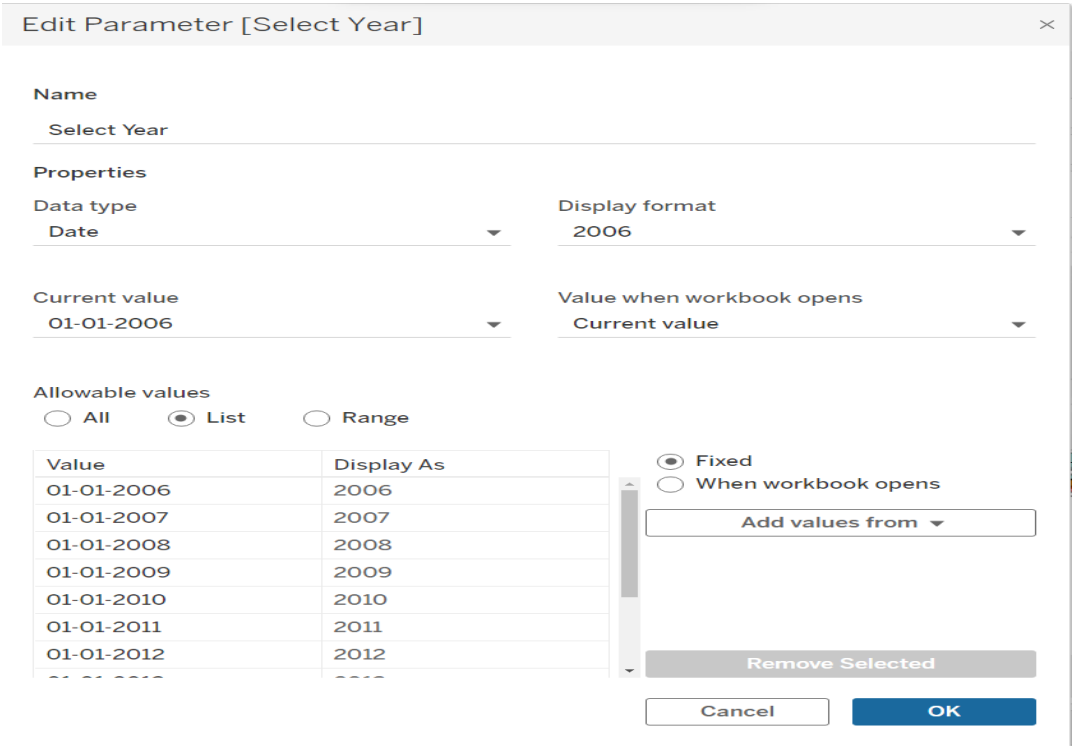
3. Go to sheet-1. Rename it as Map. Select country and double click on it. Automatically generated latitudes and longitudes will appear in rows and columns respectively. Drag and drop County to details and County code to text. Map with county code will appear. To distinguish different income group countries, drag and drop income to colour. Then map with colour differentiation and legend will appear. To filter countries based on the income group, drag and drop income to filter pan. Right click on income filter and choose appropriate. Right click on the filter and click show filter for user control.



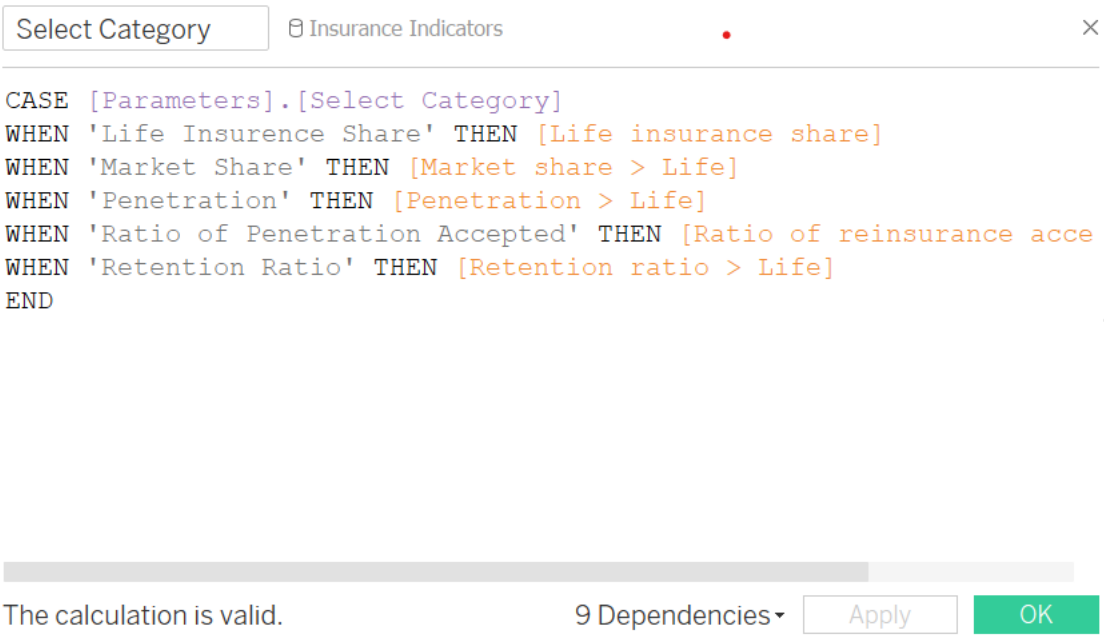
4. Now go to new sheet and name it as KPI table. Now, two parameters are to be crated for Year Selection and Category Selection. Click on the drop down option besides filter option in Data pan and click Create Parameter.
5. Give Name as Select Category and data type as string. In allowable values click on list and mention the categories required.



6. Similarly create parameter for year selection.
   Name it as Select Year and datatype as Date and enter list of values. Then click ok.



7. Now create a calculated field for the KPI table to select Category, Category Current Year, Category Previous year, Growth based on year selected. Create calculated field option will be in analysis tab.
8. Create calculated field for Category selection. Name is as Select Category.

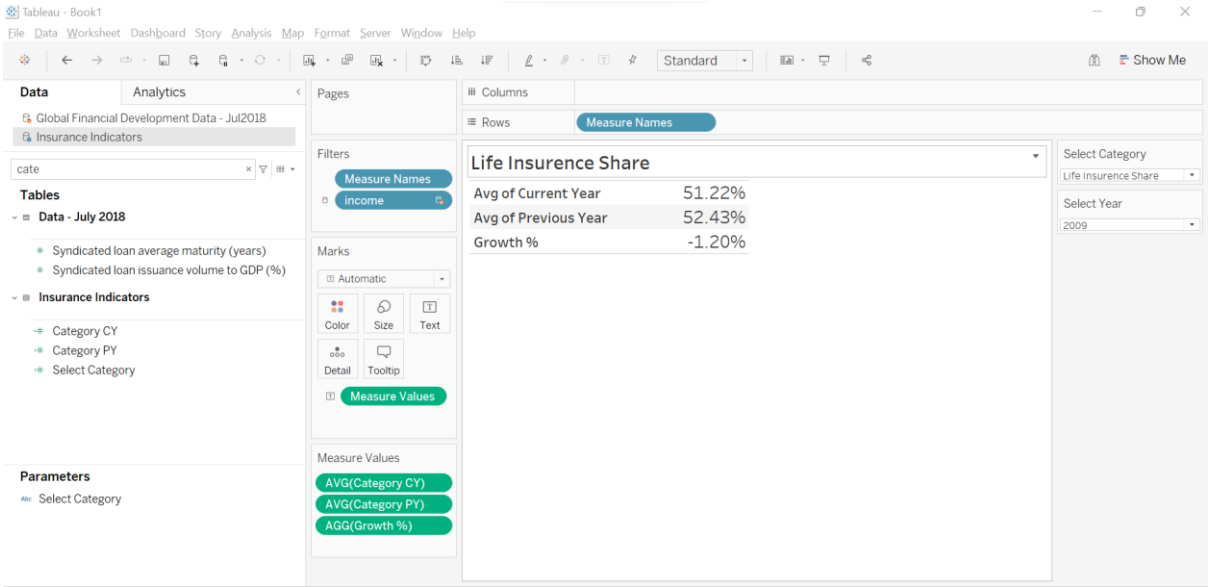


9. Create calculated field for Category Current year. Name it as Category CY for selecting the selected category for the selected year.

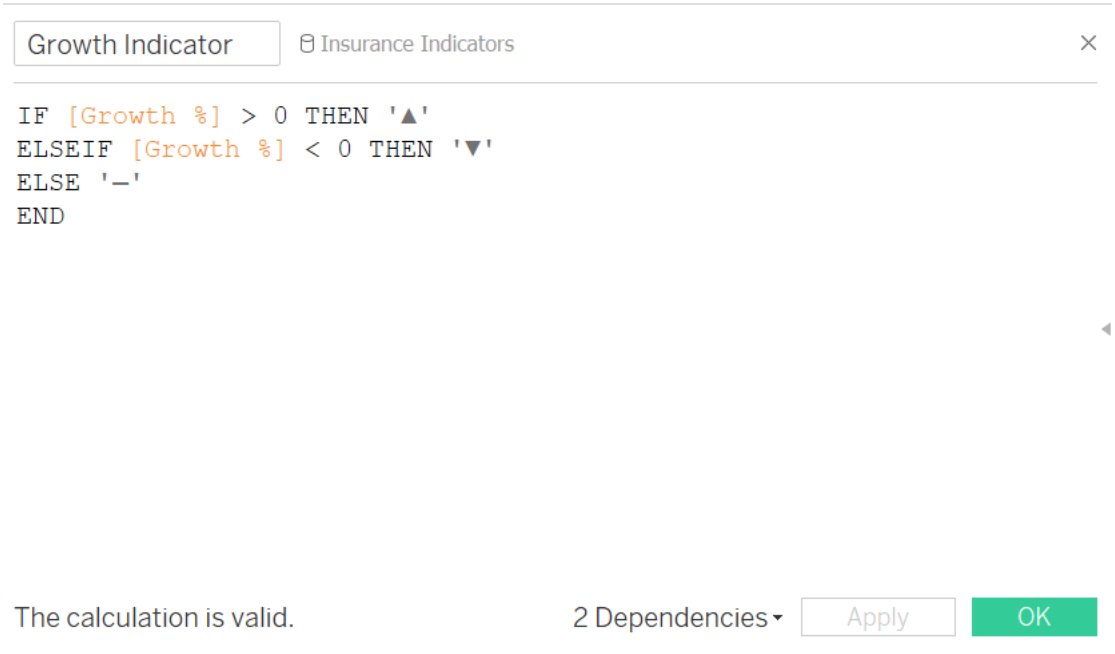
10. Create calculated field for Category Previous year. Name it as Category PY for selecting the selected category for the previous year.

11. Create calculated field for growth. Name is as Growth %.

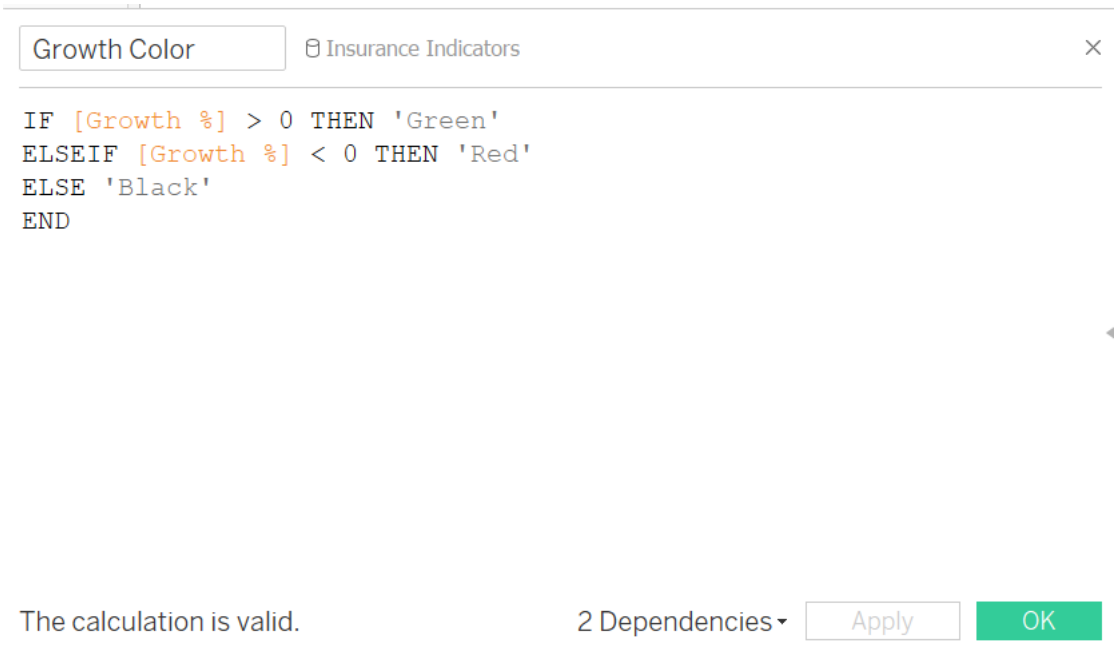
12. Now drag measures names into rows and measures values into test. Now change aggregation of the measures Category CY and Category PY to average.
13. Right click on the parameter Select Category and click on Show Parameter for user control. Similarly for Year select parameter also. Edit title of the canvas and go to insert. Select Parameter.Select Category for title to get updated along with the category selection.
14. Use formatting options for the adjusting the font, size, boarders adjustment as per requirement.



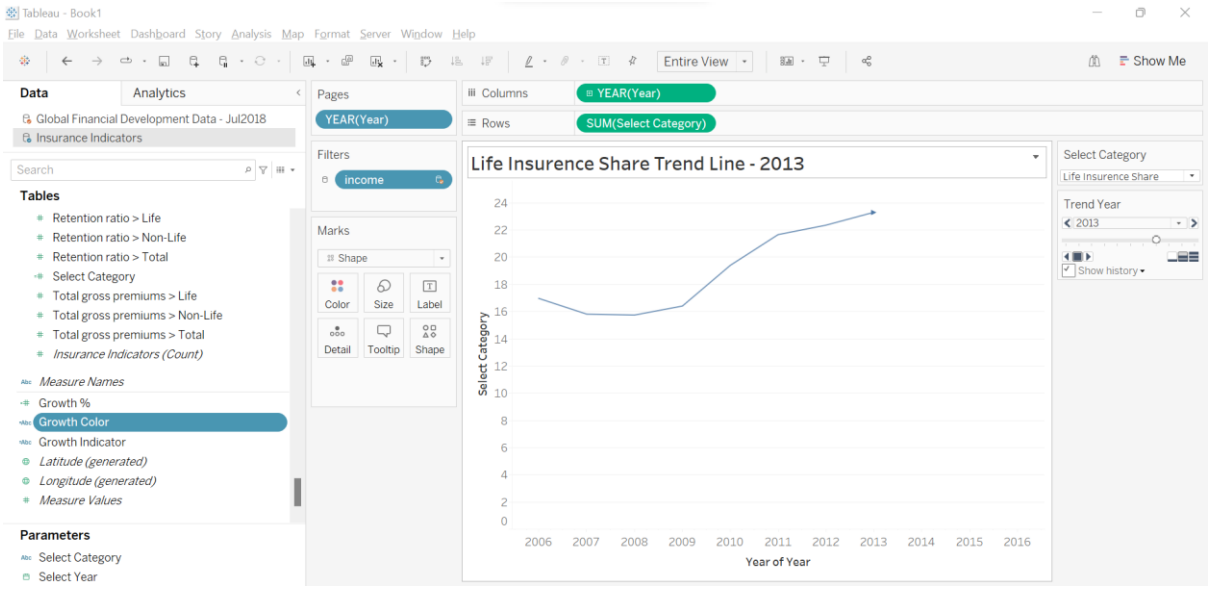
15. Now go to another sheet. Name it as Growth Indicator. Here two calculated fields will be calculated one for the symbol which shows growth (positive growth, negative growth or no change in growth). Another is for the colour for the symbol.
16. Go to analysis and click on Create a calculated field. Name it as Growth indicator. Mention the symbols for positive growth, negative growth and no change in growth.



17. Similarly create a calculated field for the colour also.

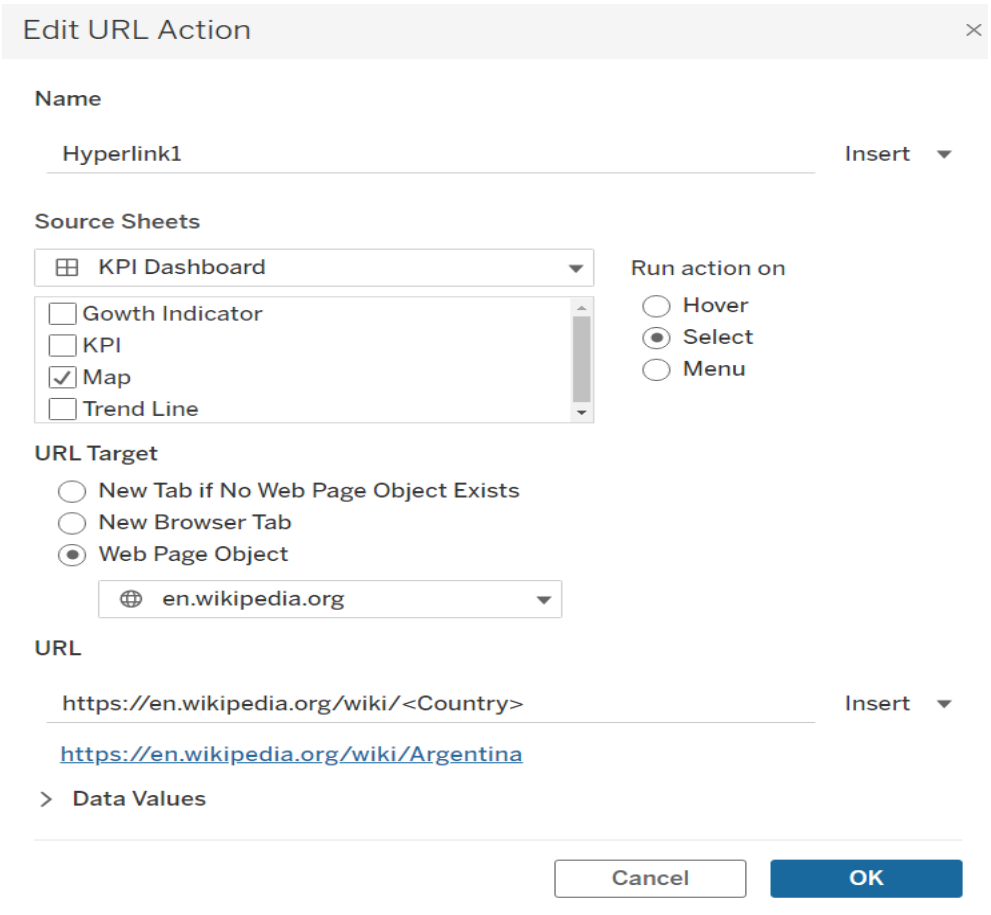


18. Now drag and drop growth indicator to text pan and growth colour to colour pan. And adjust the colours accordingly. Then click on show parameters by right clicking on the parameters created.
19. Go to new sheet and name it as Trend line. To create a trend line drag and drop year to columns and Select Category calculated field to rows. Drag years to pages to create trend line. Make sure that Marks pan is in shapes and select the required shape for the pointer. And click on show history and trails.



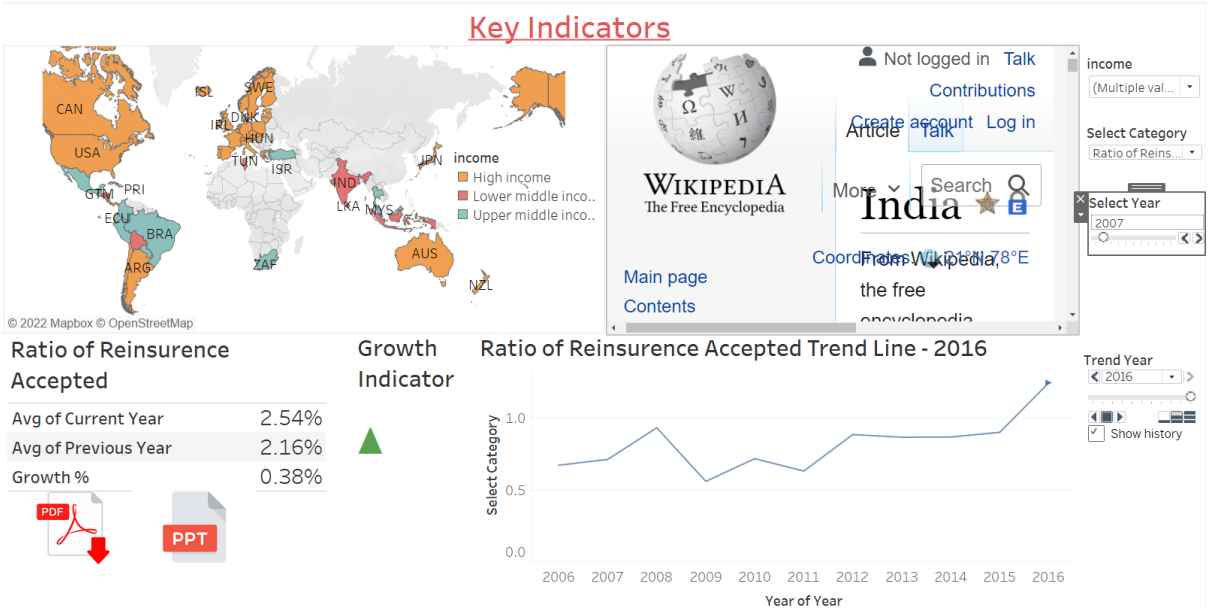
20. Now to create a dash board, go to Dashboard and name it as KPI dash board. Set the size to automatic. Drag and drop the sheets to the canvas and adjust as per requirement. Set the income group filter applicable to all the sheets.

21. To create web page in the dash board drag and drop web page option in objects to the canvas and give url as https://en.wikipedia.org/wiki/Country. Then click on Dashboard in tool bar and then click Actions. Then click on action and click on go to url. Give the name for the url action and select required options. Then click ok.



22. Select text in the Objects to add title to the dashboard. Give the title of the dashboard as Key Indicators. If needed download options can also be provided in the dashboard. Downloading format can be either .pdf or .ppt. Symbols can also be added for download options instead of text.

23. Now the Dashboard with map and all other indicators is ready with user control for income group, category selection and year selection.



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