

Final Report of Traineeship Program 2025
Project Name: Data Visualizations Project



Created by: Arunav Sehgal
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ACKNOWLEDGMENTS

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Abstract

In order to support strategic decision-making, this project sought to create an interactive Tableau dashboard called "Executive Sales," which would display financial data and key performance indicators (KPIs). The dashboard turns complicated data sets into useful insights by utilising Tableau's powerful data visualisation features. By including filters, maintaining visual coherence, and using well written charts, the dashboard complies with the project specifications.

Introduction

- **About MedTourEasy**

A global healthcare organisation called MedTourEasy makes it easier for people all around the world to get high-quality medical treatment. The organisation links people to reasonably priced and customised healthcare solutions by providing educational materials, second views, and treatment scheduling.

- **About the Project**

Making a Tableau dashboard that showcases important company KPIs like sales, profit, and discounts was the goal. The dashboard's purpose is to let stakeholders keep an eye on company performance and make wise choices.

Objectives and Deliverables

1. Design a dashboard with a size of 1250px by 750px, including five containers and a filter pane.
2. Develop the following charts:
 - **YTS KPIs:** Displaying total sales, profit, quantity, and discount.
 - **Sales:** Monthly sales trends over the years.
 - **Profit:** Monthly profit trends over the years.
3. Add filters for **Category**, **Sub-Category**, **Region**, and **Segment**, displaying only relevant values.
4. Ensure consistent formatting, appropriate padding, and professional aesthetics.

Methodology

Flow of the Project

1. Data Preparation: To ensure the dataset was clean and ready for visualisation, it was imported into Tableau.
2. Filter Creation: Filters were set up to dynamically display pertinent data.
3. Chart Development: Using formatting requirements, separate spreadsheets were created for each of the necessary charts.
4. Dashboard Assembly: Integrated the components into a unified design, guaranteeing adherence to the specifications.

Language and Platform Used

Language: Tableau offers a data visualisation environment that doesn't need any programming. Utilising Tableau's formula language, computed fields and table computations were employed for more complex customisations.

Platform: Tableau Desktop was used to build and implement the project. To guarantee end users could view and interact with the dashboard, it was shared via Tableau Public.

Implementation

- **Dataset**

The dataset used in this project can be accessed :

https://drive.google.com/file/d/1XsNol-NdHhudke8RjIaOd2Ws_yctniA3/view

- **Key Steps**

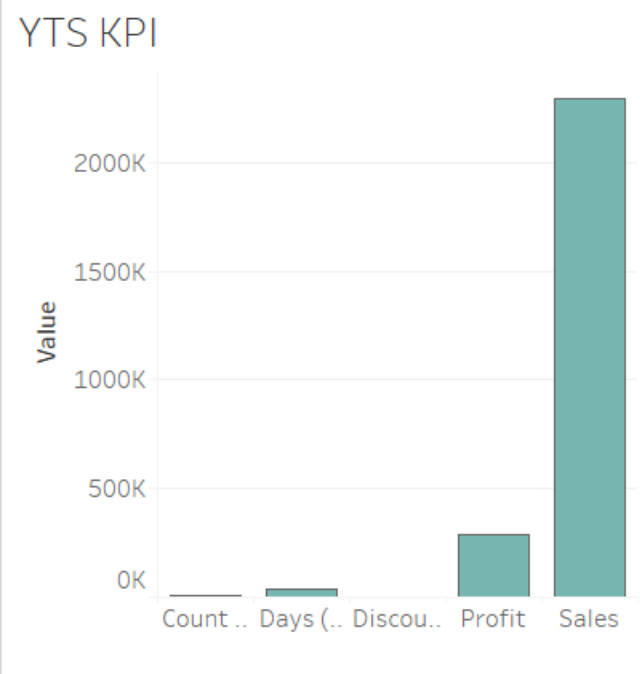
1. YTS KPIs Chart: Four KPIs—Total Sales, Total Profit, Total Quantity, and Total Discount—were displayed using Measure Values and Measure Names.
2. Sales Chart: To illustrate monthly sales patterns annually, an area chart was made.
3. Profit Chart: For monthly profit trends, a comparable area chart was created.
4. Filter Pane: To guarantee that only pertinent data was shown, filters for Category, Sub-Category, Region, and Segment were included.
5. Formatting: All items were professionally styled, with grey borders and uniform padding applied.

Screenshots and Observations

This section showcases the key features and outcomes of the dashboard.

1. YTS KPIs Dashboard

Screenshot:

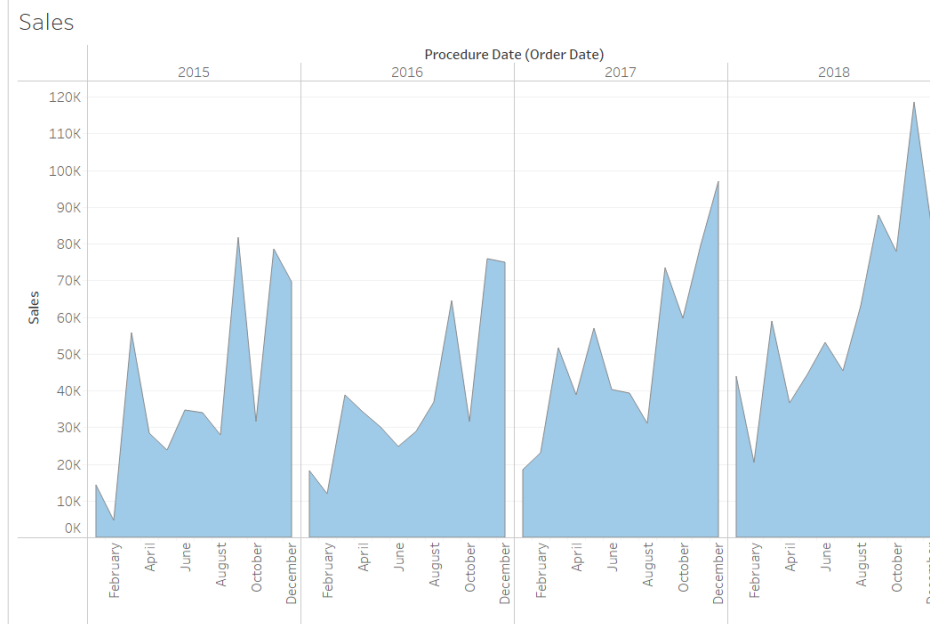


Observation:

- Displays Total Sales, Overall Profit, Total Quantity, and Total Discount as key metrics.
- Highlights actionable KPIs for performance tracking.

2. Sales Chart

Screenshot:

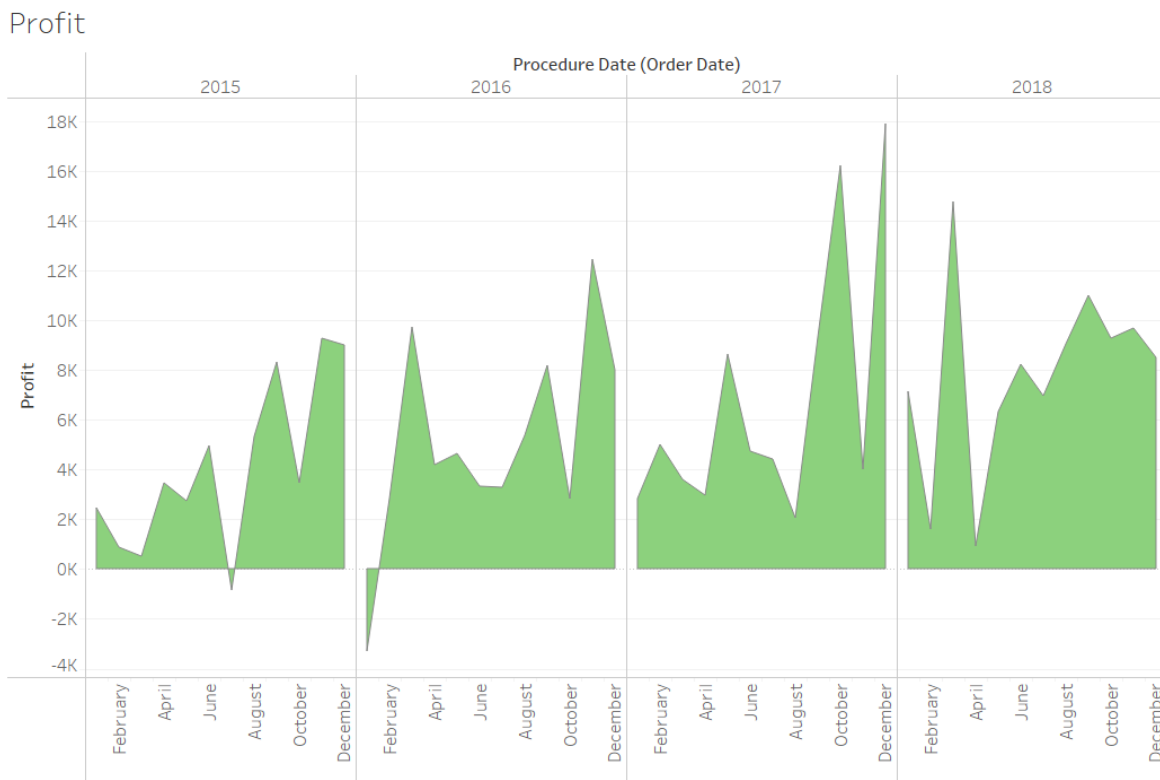


Observation:

- The area chart reveals monthly sales trends over multiple years.
- Seasonal patterns in sales can guide inventory and marketing strategies.

3. Profit Chart

Screenshot:

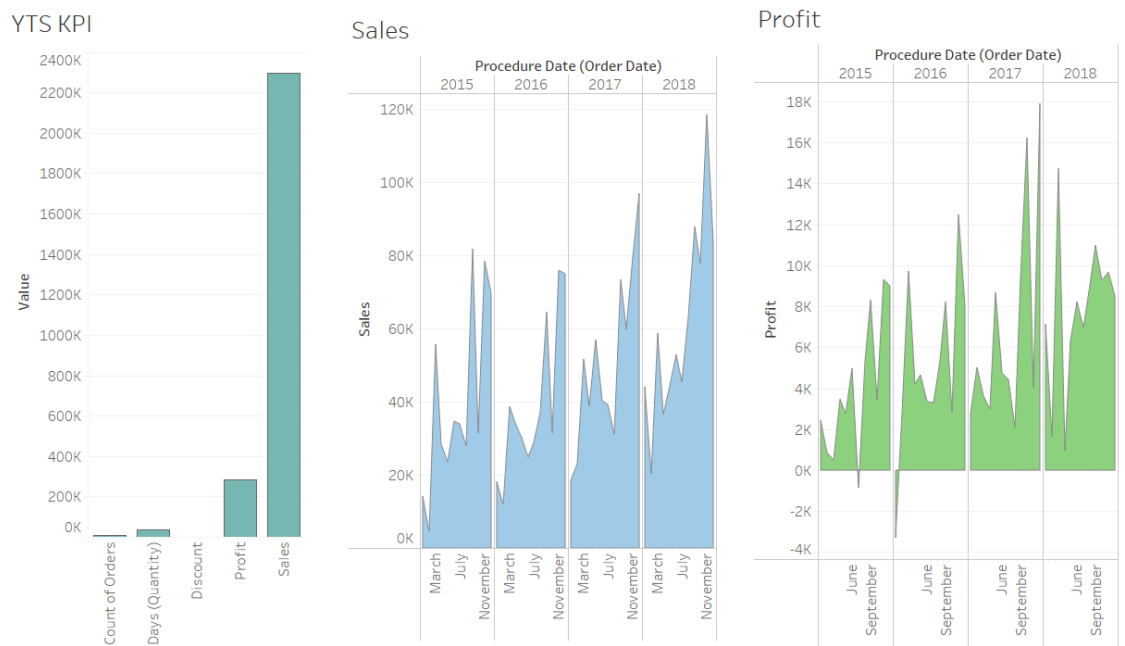


Observation:

- Monthly profit trends provide insights into periods of high and low profitability.
- These trends can influence budget allocation and cost-saving measures.

4. Full Dashboard Overview

Screenshot:



Observation:

- The cohesive layout integrates all components, ensuring seamless navigation and data exploration.
- The professional formatting and responsive design make it user-friendly for business analysts.

Conclusion

All project criteria were successfully fulfilled by the "Executive Sales" Tableau dashboard. It gives actionable insights that can guide strategic decision-making by visualising important indicators and trends.

The project also showed off Tableau's capabilities as a tool for turning unstructured data into insightful visualisations. The dashboard provides customers with an interactive experience that enables them to explore particular company issues in greater detail thanks to its professional layout and user-friendly filters. This dashboard's insights can help with pattern recognition, trend forecasting, and strategy optimisation, all of which lead to better decision-making.

This project has also reaffirmed how crucial it is to match visualisation strategies with organisational objectives in order to produce outcomes that are both aesthetically pleasing and analytically significant. The final result was polished and useful thanks in large part to the teamwork and iterative refining process.

Future Scope

- To anticipate future patterns in sales and profits, use predictive analytics.
- Drill-through reports may be made more interactive to provide deeper insights into particular data points.
- Automate data changes to maintain real-time performance indicators on the dashboard.