Data Visualisation Project Documentation

Goal = make picture for insights for practical outcomes.

Data from stakeholders interacting with hub24 applications -> use data to create visualisation for insights to assist in product development and meeting user needs (where resources should be allocated -> better for users).

Taking advantage of public data + internal data -> for well-rounded insights.

Use 3D visualisations + any other creative ways that make it easier to view the patterns etc.

Plan:

Create a data visualisation tool with SQL Lite

Some main data points for benchmarks: (start with just performance benchmark ie a singular metric)

* Tax return history ->
* Property information
* Census data -> individual details
* Additional income
* Age

^ most of these aren’t even on the given data…

***Given:***

1. Census data -> info on individuals -> could map their locations on a map, or summarise onto some graph…
2. Performance of asset (ROI) -> have this as a BENCHMARK parameter for the visualisation tool. Based on ACCOUNT ID selected…
3. Asset value -> map asset values (total) on the map for the specific visualisation feature. -> maybe some other geographical representations?

* Any useful visualisations? -> explain why it would be useful, what does it help us see better? What insights does it provide?

***Public:***

1. Government census data -> household income levels / distribution -> we can see the general average and see how much disposable income could be used for financial advising… (wealth management), ie where are the areas of opportunity…
2. Financial literacy results -> shows us what percentage of Australians would do better with a financial advisor… graph generically / geographically?

Tasks:

1. Display data in SOME way (experiment) -> **generic visualisation**
2. Create benchmark feature for performance (ROI) for each investor and advisor. -> **extra feature**
3. Have additional geographical visualisation feature -> some simple showcase on the map (some tool can do probably). -> **specifically asked for visualisation**

**Tangible steps:**

1. Work on 1 feature at a time…
2. Familiarise with SQL Lite module…
3. Convert csv into database
4. Download public data to be used

First make specific tools that do specific outputs -> then combine them all together in an application, that has an interface where you can access what visualisation you want to see.

Marketing demographic which age range should you market too… based on their disposable income?

To use to the tool, it needs to be connected to a data base, so then when the data base is updated the tool stays the same but is connected to the data base…

So first have the tool working, which arbitrary data sets given… Then in the grand scheme of things, you need to make a web application with javascript… that has its backend controlled python… somehow they sync together…

1. Store data… to be used

3 datasets now can be used and formatted specifically…

Each dataset has a distinct visualisation… done by some functions on the python… once the tools work…

We try to connect front end with back end…

Matplotlib seems to be the go rn..