UK Bank - Dashboard Exercise

Tableau starter file: uk-bank-dashboard-problem-0.twbx

Source Data: P1-Uk-Bank-Customers.csv

Goal: Who is interested in the bank and how to better serve their customers

Procedure: Build the worksheets (Map, Gender, Age, Job Classification) then build the Dashboard

Worksheets

Map

Step 1. Load the data

Step 2. Build a map (You will need to select a geographic role for region)

Step 3. Label the map with the number of customers in each region

Step 4. Rename the sheet as “Map”

Visualize the Demographics (Gender, Profession, Age Groups) of the members of the bank

Gender

Step 1. Start a new sheet and build a pie chart showing breakdown by Gender (Hint: One easy way to create a pie chart is to select a measure and a dimension and then select Pie under the “Show Me” tab)

Step 2. Resize, Color, and label as a percentage (you will need a quick table calculation for the percentage) – Format the percentage values for no decimal points

Step 3. Rename the sheet as “Gender”

Age

Step 1. Start a new sheet and build a histogram showing the breakdown of the bank’s customers by Age (Hint: You will need to create bins on Age, use a bin sizes of 5 years)

Step 2. Resize, Color, label as a percentage as we did for gender (we can clean up some other formatting later)

Step 3. Rename the sheet as “Age Distribution”

Balance

Step 1. Like you did for Age, build a histogram of balances – use a bin size of 10000.

Step 2. Choose a different color – maybe green

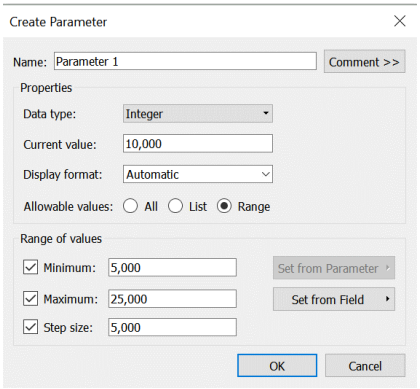
Step 3. Rename the sheet as “Balance Distribution”

Add a Parameter to Control the Balance Histogram Bin Size

Step 1. Right click in Measures and select “Create Parameter”

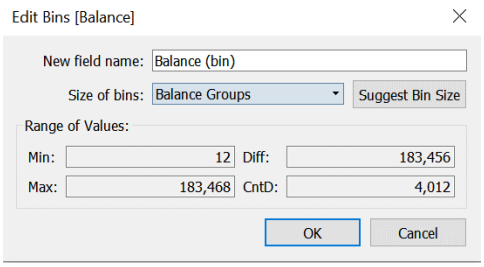
Step 2. Name it – something like “Balance Groups”

Step 3. Define an integer parameter as:



Step 4. After its defined – right click on the parameter and select “Show Parameter Control”

Step 5. Link the parameter to the size of the bins by selecting the dropdown from “Balance (bin)” field and select “Edit” and under Current value – select “Balance Groups” – thereby linking the new parameter to the current value for the bins – result should look like this:



Step 6. Check that you can dynamically change the Balance Bin Size

Step 7. Repeat for Age (that is, create a Parameter controlling the size of the Age Bins) – Make it a list with values 1, 5, 10, and make the control a slider (edit the control itself)

Job Classification

Step 1. Build a Tree Map for Job Classification – by selecting Job Classification, Number of Records, and select Tree Map under “Show Me”

Step 2. Drag Job Classification to Color and Resize – Re-color

Building the Dashboard

Step 1. Create a new Dashboard

Step 2. Set the size of the Dashboard (We’ll use the “Generic Browser” setting)

Step 3. Drag and Adjust each Worksheet (built above) to the Dashboard, resizing and adjusting as desired – note that parameter controls, filters, etc... come along with each worksheet

Step 4. As you add Worksheets – you can remove legends or other controls you don’t need (The color scales for the histograms for example).

Step 5. Resize worksheets on the Dashboard as desired – this takes some practice...There is a “Fit” option under each worksheet that seems to work pretty well

Define Interaction

Step 1. Under the Map pulldown menu – select the “Use as Filter” option

Step 2. Review, under the Dashboard menu – the Dashboard Actions – you will see a Generated Filter

Step 3. Note as you select regions in the map, how the rest of the dashboard updates

Step 4. Optionally – disable tooltips for individual worksheets as desired