Comparative Study of Countries

By Sadaf Nasreen

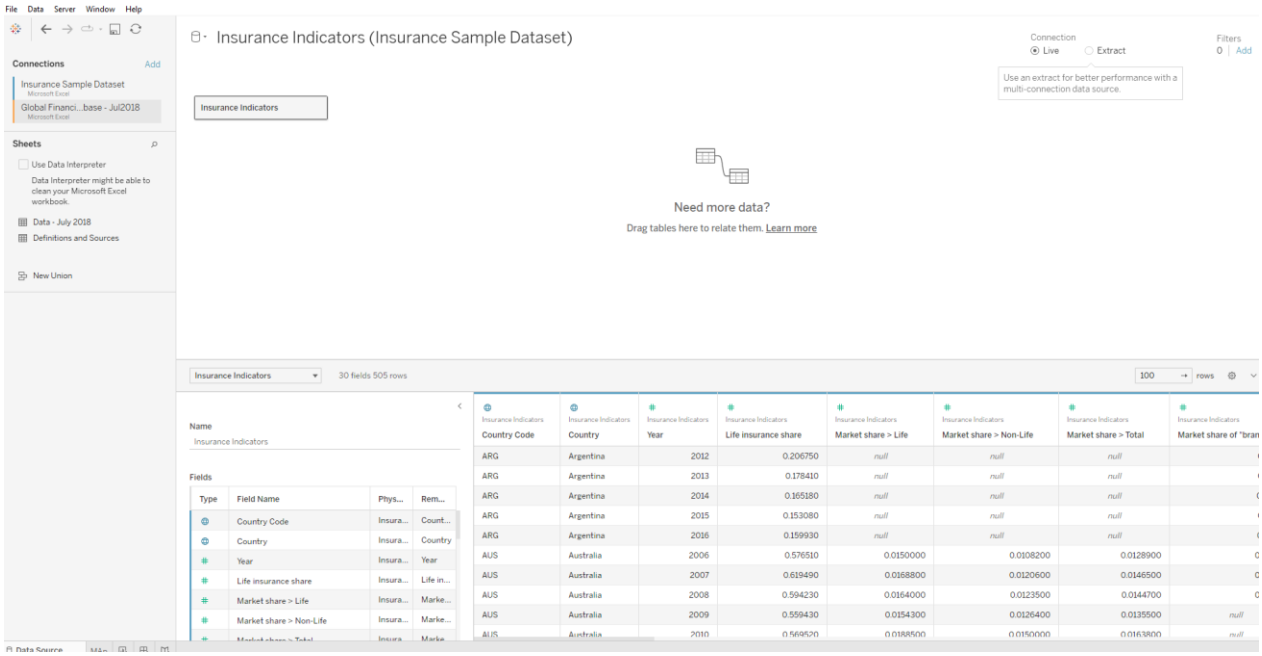
Step 1: Open Tableau 2021.4

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.

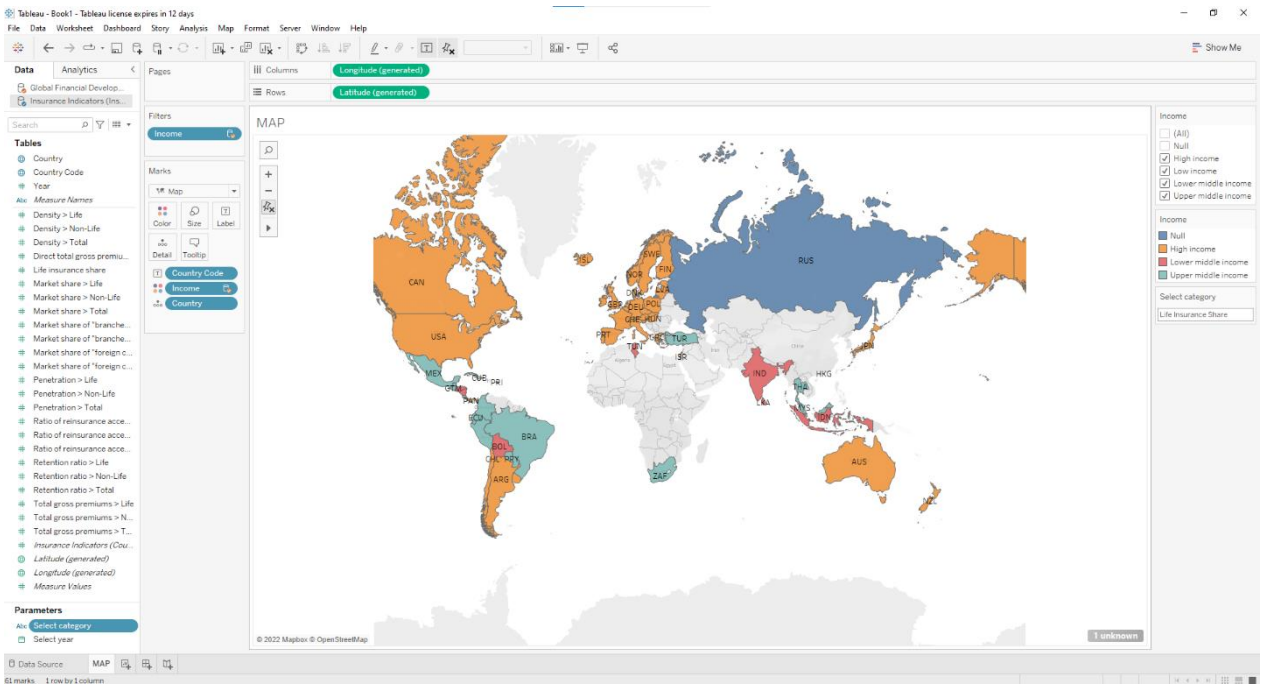
Step 5: Click on Add button to connect Insurance Sample Dataset Excel file



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. After that, drag Income from Global Financial Development Database to filer and

select all and click on show filter. Drag Income to Color Mark Card and Country Code to text Mark card.



Step 8: Create two parameters, one for Select Year and another Select category.

Step 9: To create Parameter go to Down key in Data panel, And click on Create Parameter. For Year parameter, select Date datatype and for Select

Category Choose the String Data type.

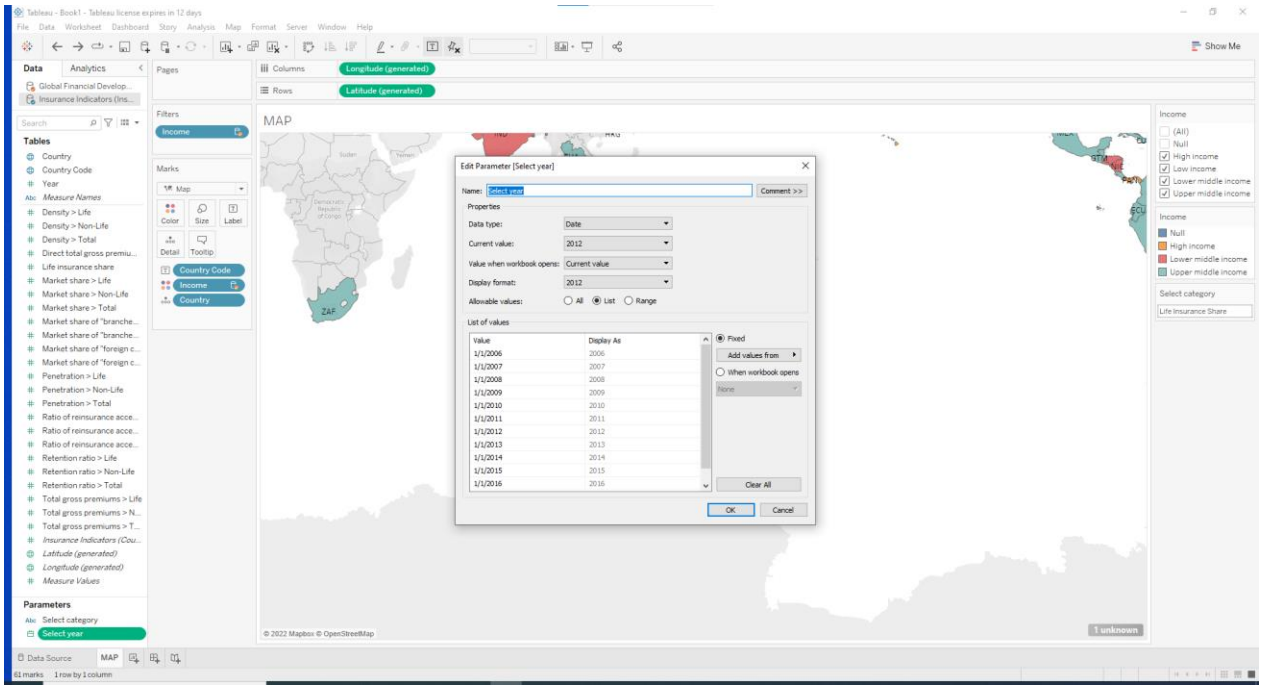


Tableau - Book1 - Tableau license expires in 12 days
Edit Parameter [Select year]
Name: Select year
Comment >>
Properties
Data type: Date
Current value: 2012
Value when workbook opens: Current value
Display format: 2012
Allowable values: All List Range
List of values
Value
Display As
1/1/2006
1/1/2007
1/1/2008
1/1/2009
1/1/2010
1/1/2011
1/1/2012
1/1/2013
1/1/2014
1/1/2015
1/1/2016
Fixed
Add values from
When workbook opens
Clear All
OK
Cancel
MAP
Select year

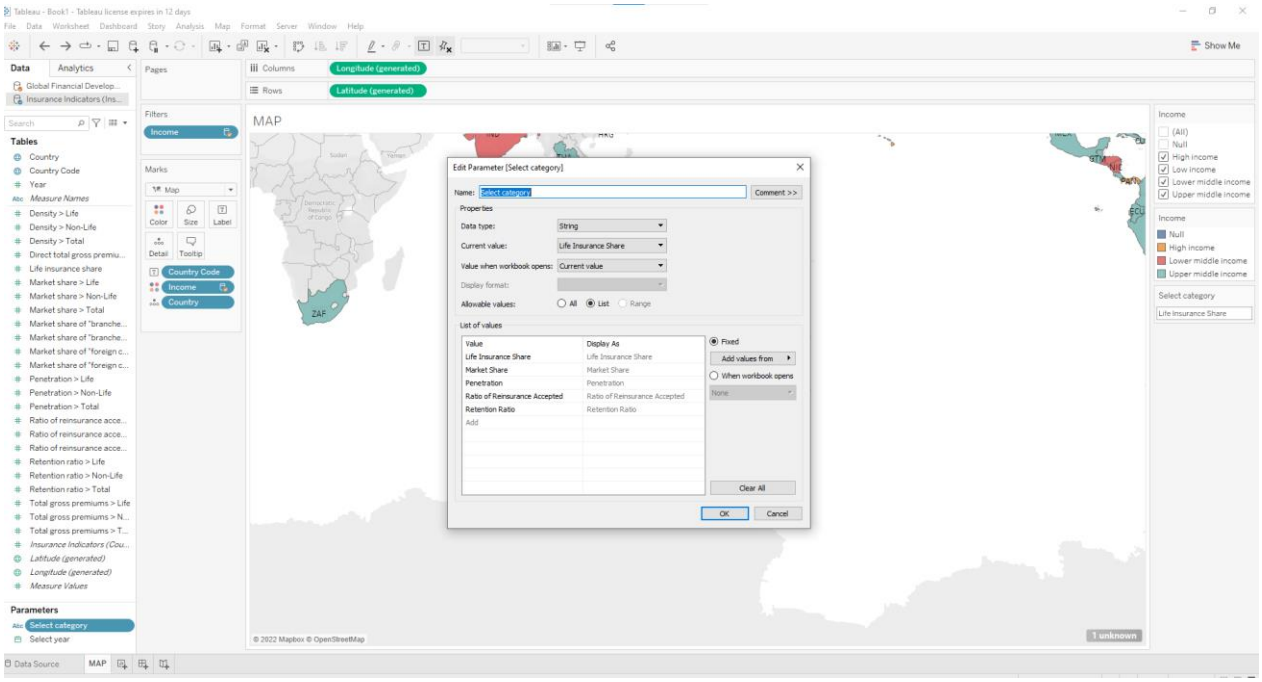
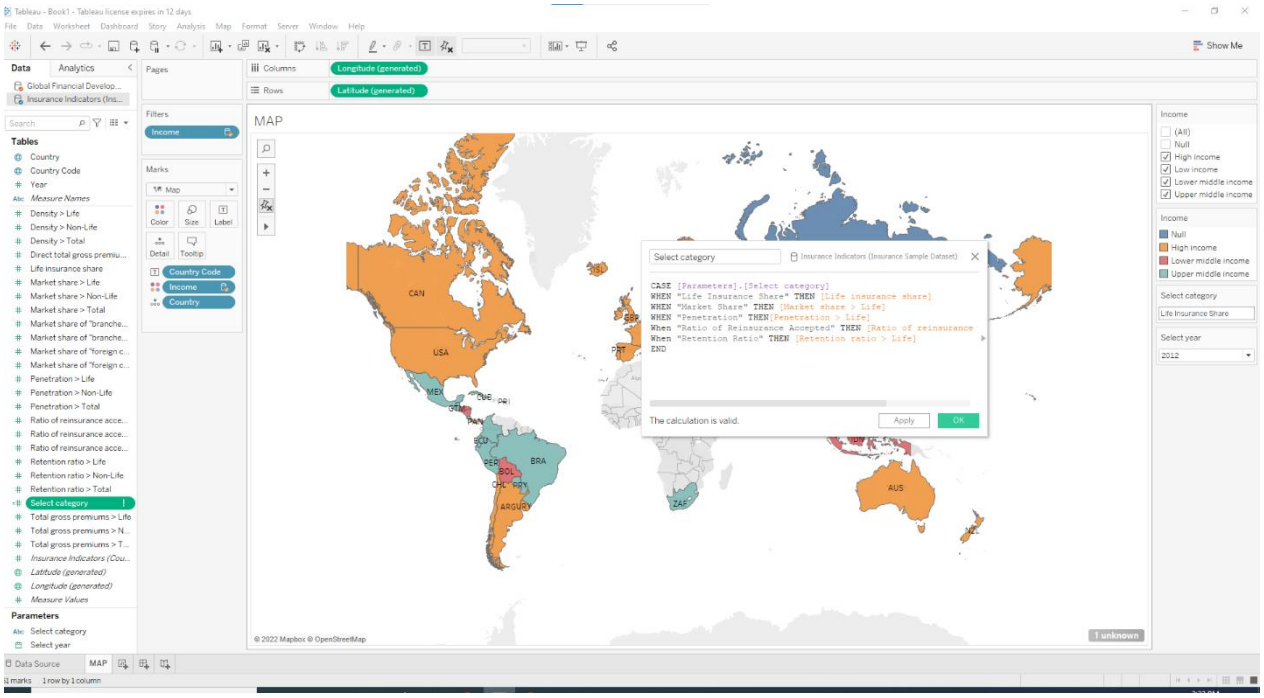
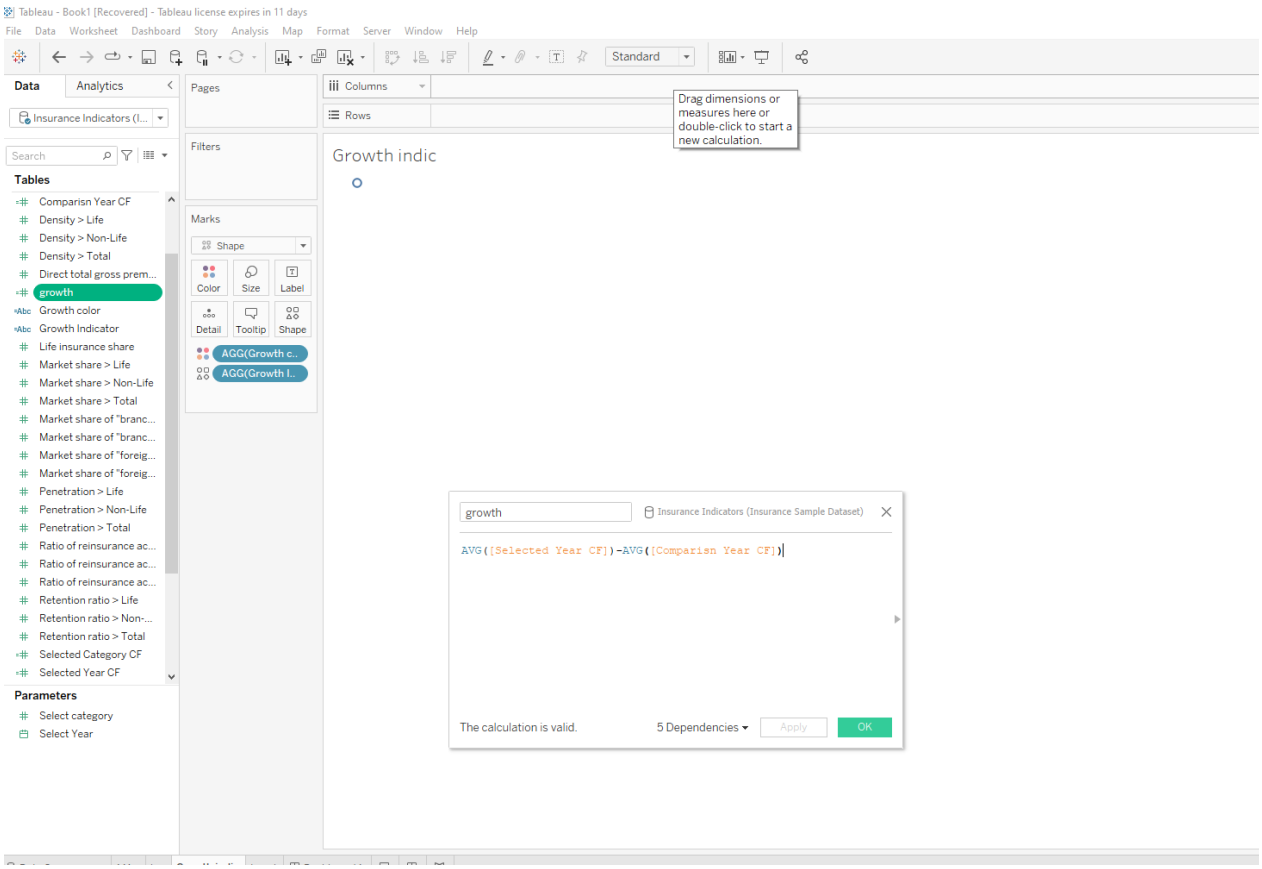


Tableau - Book1 - Tableau license expires in 12 days
Edit Parameter [Select category]
Name: Select category
Comment >>
Properties
Data type: String
Current value: Life Insurance Share
Value when workbook opens: Current value
Display format:
Allowable values: All List Range
List of values
Value
Display As
Life Insurance Share
Market Share
Penetration
Ratio of Reinsurance Accepted
Retention Ratio
Add
Fixed
Add values from
When workbook opens
Clear All
OK
Cancel
MAP
Select category

Step 10: Create Calculated Field: To Select
Category, Selected Category CF(Current year) and Comparison Year CF(Previous Year),Growth %.
Click on Analysis Pane , and then Calculated Field and do calculations for the following.
Selected Category CF : to Select Category Parameter

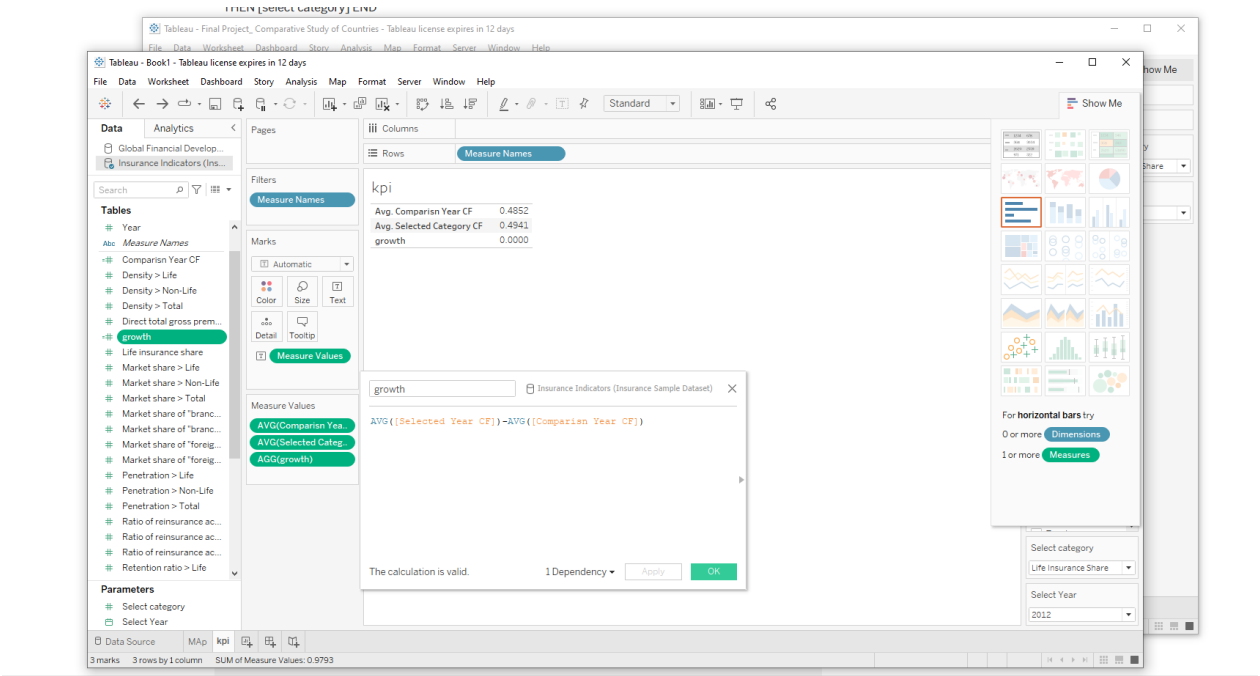
Selected Category CF: Selected Period Value
Comparison Year CF: Comparison Period Value
growth : For Growth in percentage





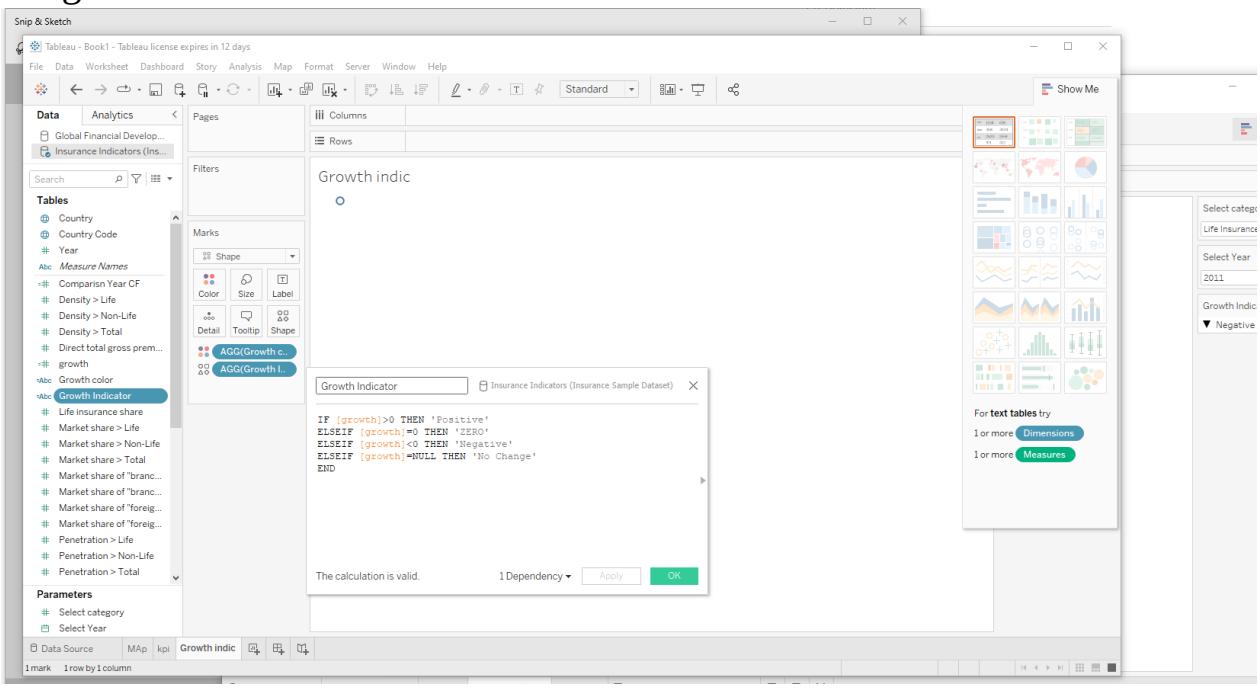
Step 11: Create a KPI Calculator: Go to new sheet and rename it kpi and click on Sheet title and insert Select Category
Click on Parameters and Show Parameter

Drag Measure Names to Row and filter it to Selected category CF, Comparison Year CF, growth.
And Measure Values to Text Mark card
Step 12: To create a growth indicator:
Create 2 Calculated Field: Growth Color 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.

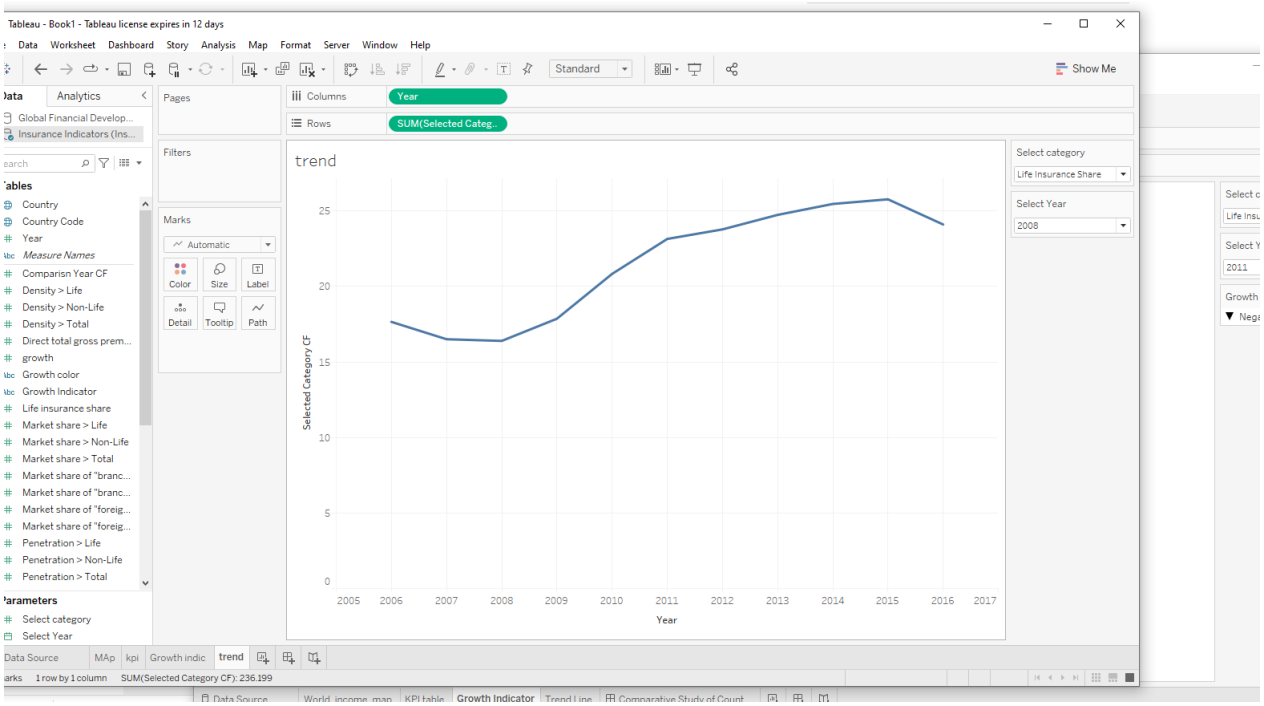
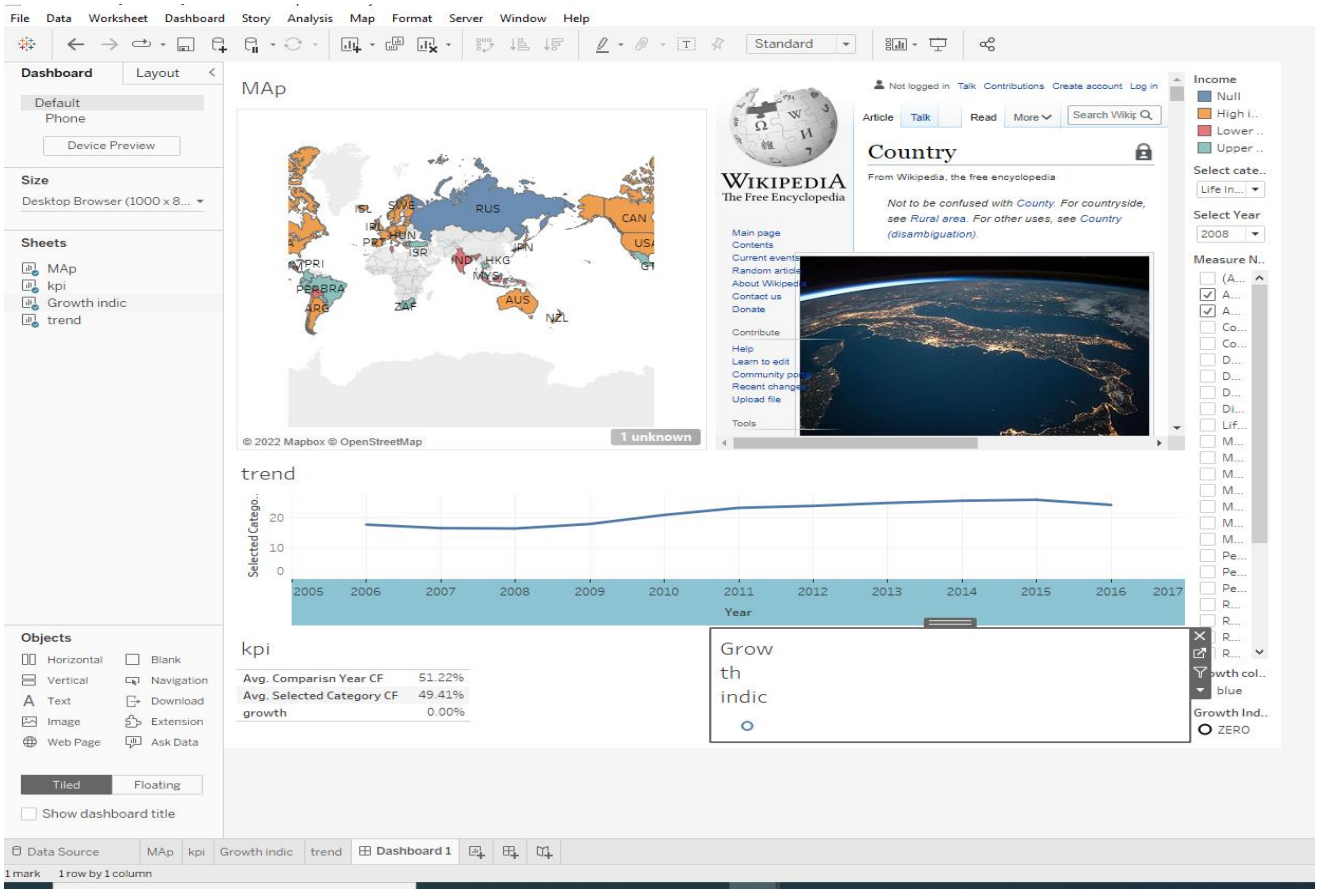


Tableau - Book1 - Tableau license expires in 12 days
Data Worksheet Dashboard Story Analysis Map Format Server Window Help
Standard
Show Me
Analytics
Global Financial Develop...
Insurance Indicators (Ins...
Tables
Country
Country Code
Year
Measure Names
Comparisn Year CF
Density > Life
Density > Non-Life
Density > Total
Direct total gross prem...
growth
Growth color
Growth Indicator
Life insurance share
Market share > Life
Market share > Non-Life
Market share > Total
Market share of "branc...
Market share of "branc...
Market share of "foreig...
Market share of "foreig...
Penetration > Life
Penetration > Non-Life
Penetration > Total
Parameters
Select category
Select Year
Pages
Filters
Marks
Automatic
Color
Size
Label
Detail
Tooltip
Path
Columns
Year
Rows
SUM(Selected Categ..
trend
Selected Category CF
Year
0
5
10
15
20
25
2005
2006
2007
2008
2009
2010
2011
2012
2013
2014
2015
2016
2017
Select category
Life Insurance Share
Select Year
2008
Data Source
MAp
kpi
Growth indic
trend
1 row by 1 column
SUM(Selected Category CF): 236.199
Growth Indicator
Trend Line

Step 14: Create a Dashboard: Click on Dashboard button.
Go to Size and click Automatic.
Go to Objects and click on Horizontal, drag the MAp
to sheet, From Objects drag web Page to sheet.
Then Go to Dashboard, add URL -> And add URL in URL bar