

Project 1

Submitted by: Shikha Sachan

Comparative Study of Countries

DESCRIPTION

You are a data analyst working for an insurance company. The company is expanding and wants to open new branches in various parts of the world. Your task is to compare various parameters such as income, life insurance share, market share, penetration, ratio of reinsurance accepted, and retention ratio of different countries using the sample insurance dataset and world development indicators dataset.

Objective:

Create a dashboard to compare all the parameters mentioned above for different countries, to strategize market penetration and to target new customers.

Datasets:

Primary Dataset – Insurance Sample Dataset

Secondary Dataset – Global Financial Development Database

Note: Use Data Blending with Relationships between Country Code, Country, and Year

Steps:

- Connect Insurance Sample Dataset and Global Financial Development Database to Tableau
- Country and Year fields are common in both datasets. Also, Country Code and ISO3 fields are having same data, so blending can be used for these two. (Using data > edit blend relationship)

1. Create a geographic map showing the countries' fields. Color the map based on the income column from the secondary dataset

- **Include income group filter in the dashboard**
 - Drag Country field from Insurance Sample Dataset > there are 3 unknown locations found > add coordinates using edit locations.
 - Add Country Code on Label shelf, Income on Colour and Detail shelf.
 - Add Income on filter shelf

- **Create a calculated field to calculate the Growth %**
 - Create Calculated Field: To Select Category, Categorical CY(Current year) and Categorical PY(Previous Year),Growth %.
 - Click on drop down in data pane and then Calculated Field and do calculations for the following.
 - Select Category is for: to Select Category Parameter
 - Category (CY): Selected Period Value
 - Category (PY): Comparison Period Value
 - Growth: For Growth %

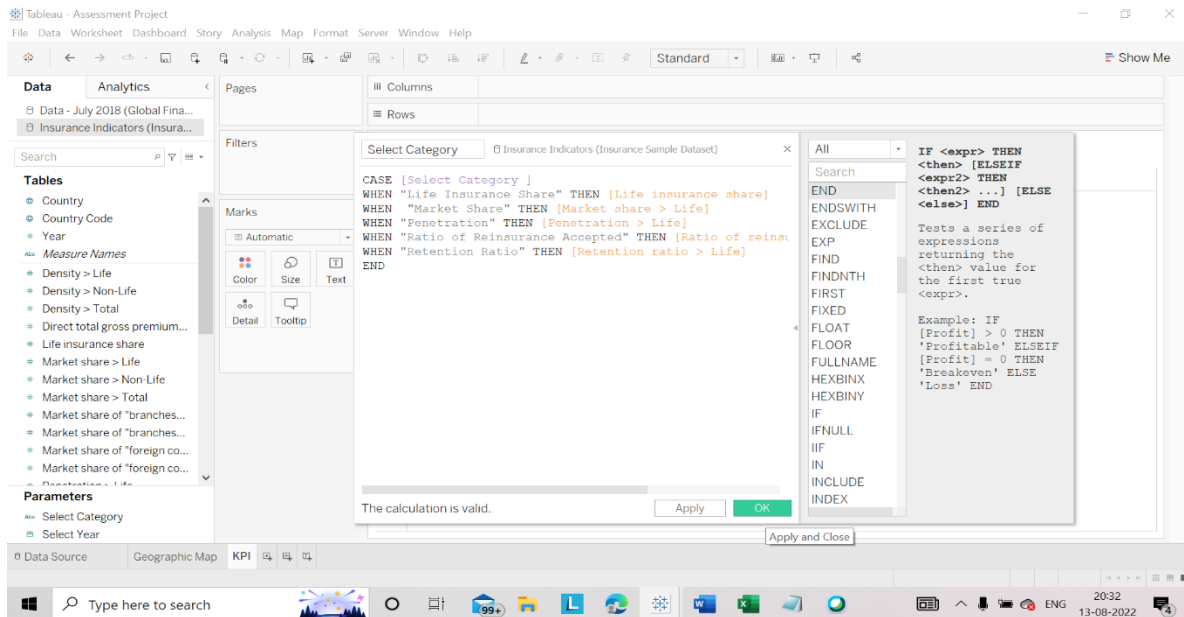


Tableau - Assessment Project

File Data Worksheet Dashboard Story Analysis Map Format Server Window Help

Standard

Show Me

Data Analytics

Data - July 2018 (Global Fina...)

Insurance Indicators (Insura...)

Search

Tables

- Country
- Country Code
- Year
- Measure Names
- Density > Life
- Density > Non-Life
- Density > Total
- Direct total gross premium...
- Life insurance share
- Market share > Life
- Market share > Non-Life
- Market share > Total
- Market share of "branches..."
- Market share of "branches..."
- Market share of "foreign co..."
- Market share of "foreign co..."

Parameters

- Select Category
- Select Year

Filters

Category(CY) Insurance Indicators (Insurance Sample Dataset)

if YEAR([Year])=YEAR([Select Year])
THEN [Select Category]
END

Marks

Automatic

Color Size Text

Detail Tooltip

The calculation is valid.

Apply OK

All

Search

END

ENDSWITH

EXCLUDE

EXP

FIND

FINDNTH

FIRST

FIXED

FLOAT

FLOOR

FULLNAME

HEXBINX

HEXBINY

IF

IFNULL

IIF

IN

INCLUDE

INDEX

IF <expr> THEN
<then> [ELSEIF
<expr2> THEN
<then2> ...] [ELSE
<else>] END

Tests a series of
expressions
returning the
<then> value for
the first true
<expr>.

Example: IF
[Profit] > 0 THEN
'Profitable' ELSEIF
[Profit] = 0 THEN
'Breakeven' ELSE
'Loss' END

Data Source Geographic Map KPI

Type here to search

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- Market share of "branches..."
- Market share of "foreign co..."
- Market share of "foreign co..."

Parameters

- Select Category
- Select Year

Filters

Category(PY) Insurance Indicators (Insurance Sample Dataset)

IF YEAR([Year])= YEAR([Select Year])-1
THEN [Select Category]
END

Marks

Automatic

Color Size Text

Detail Tooltip

The calculation is valid.

Apply OK

All

Search

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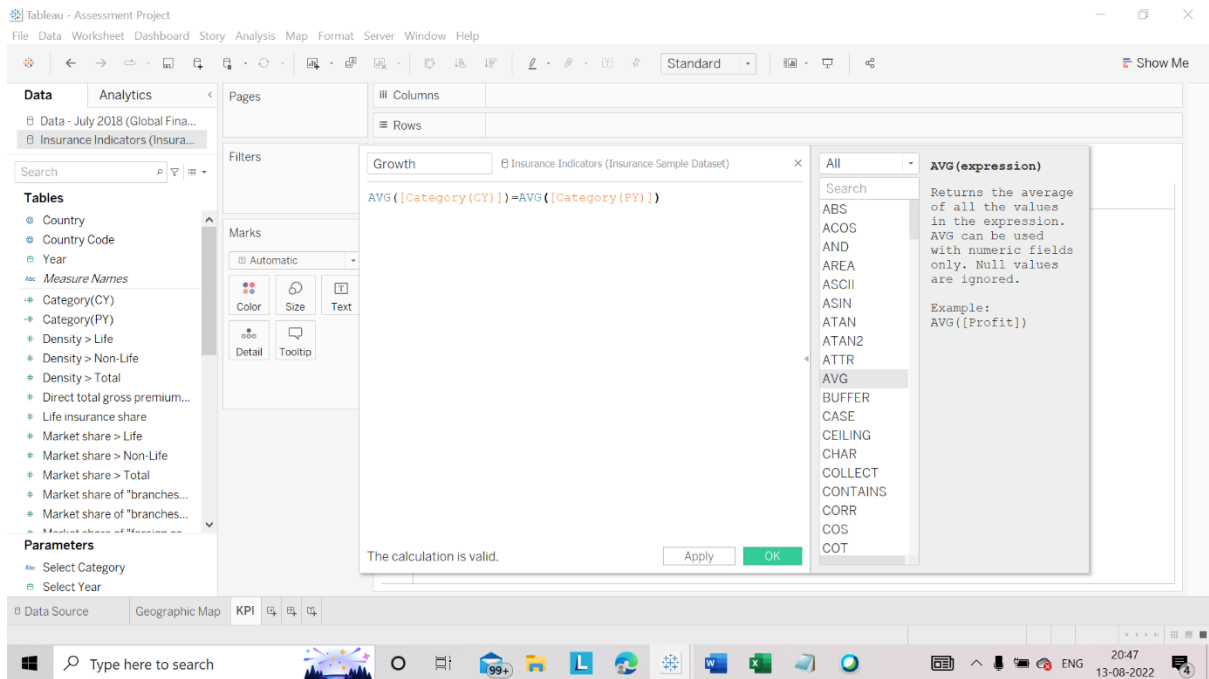
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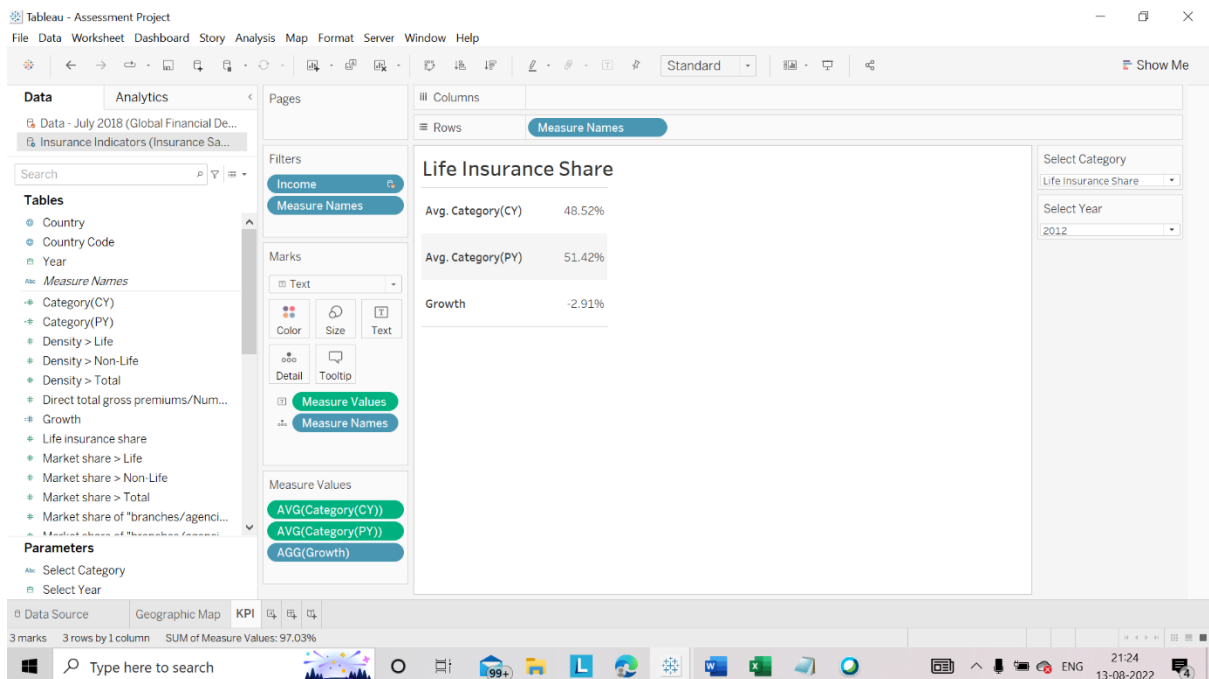
Data Source Geographic Map KPI

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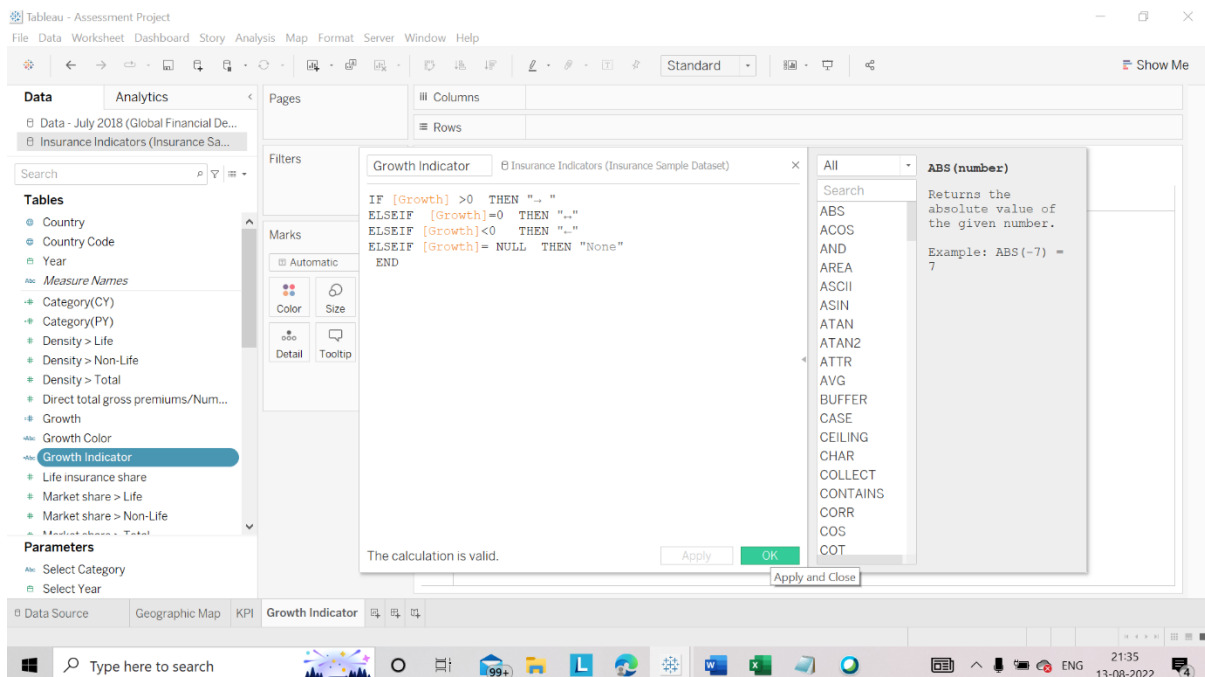
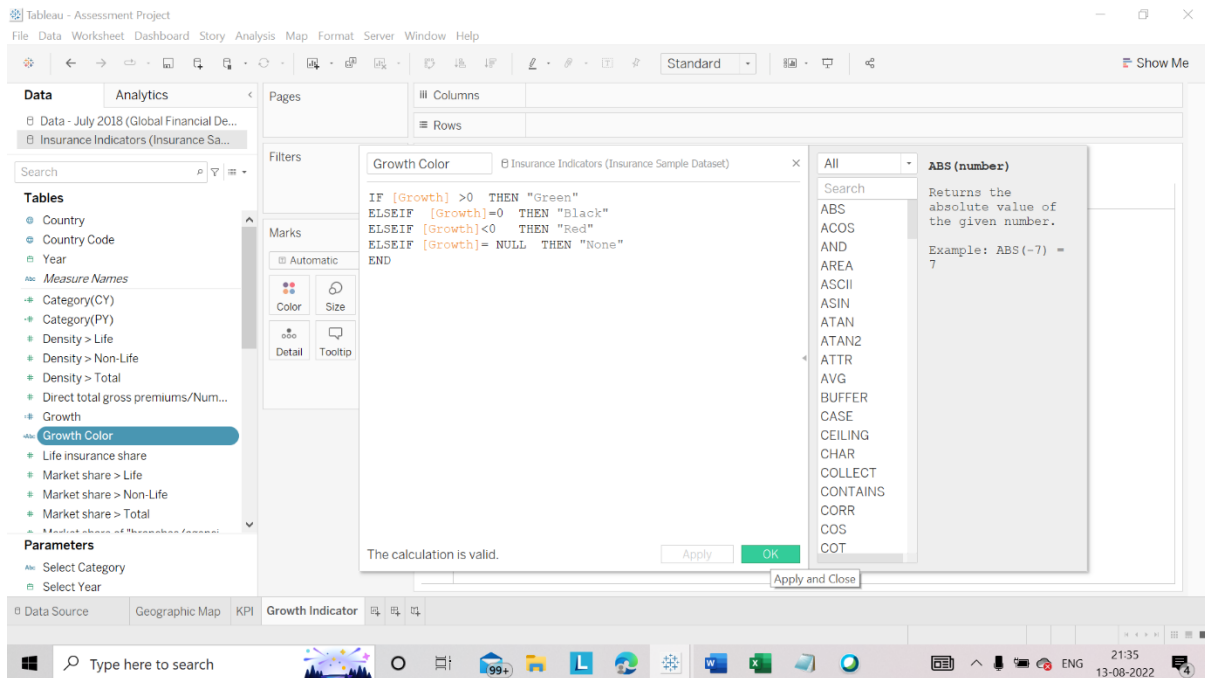
- **Create a table to show these values. Title should be updated based on the category selection**
 - Create a KPI Calculator: Go to new sheet and rename it KPI and click on Sheet title and insert Select Category
 - Click on Parameters and Show Parameter.



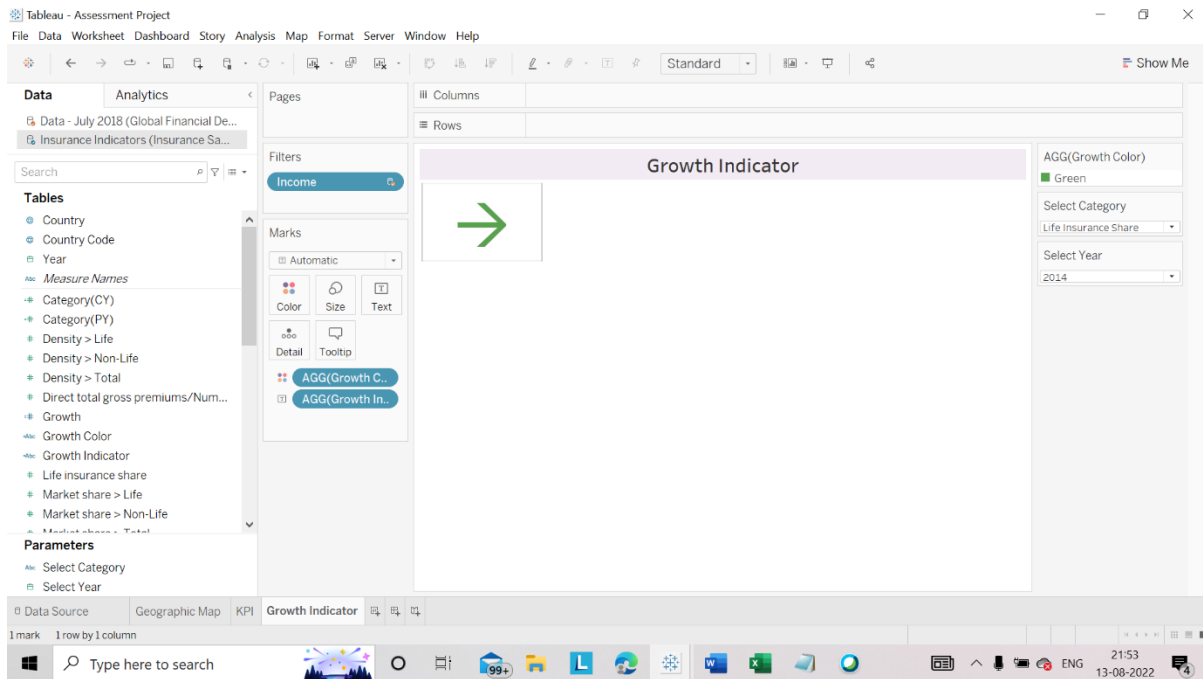
3. Create Growth Indicator Shapes based on the Growth %

- Growth indicator displays Negative, No Change, and Positive as values and corresponding shapes against it

➤ Create two Calculated Field: Growth Colour and Growth Indicator:

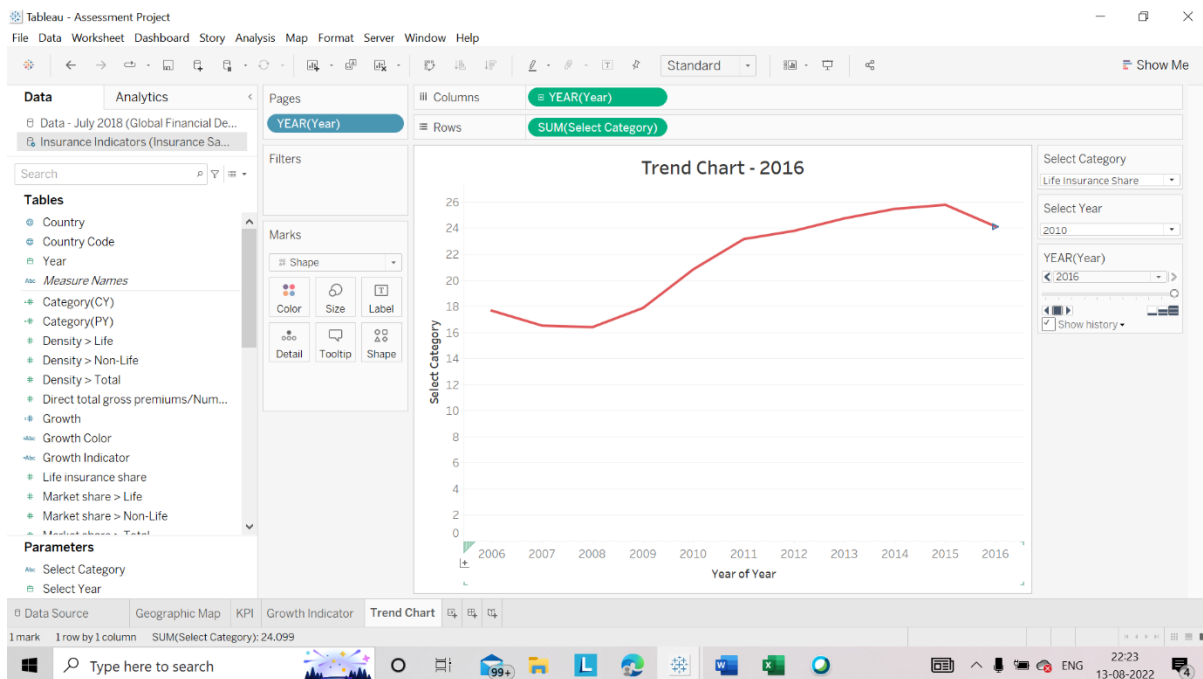


➤ Growth Indicator Visualization : Go to New Sheet and rename it Growth Indicator Click on Parameters and Show Parameter. Drag Growth Colour to Colour and Growth Indicator To text.



4. Create a trend line to show the selected category values

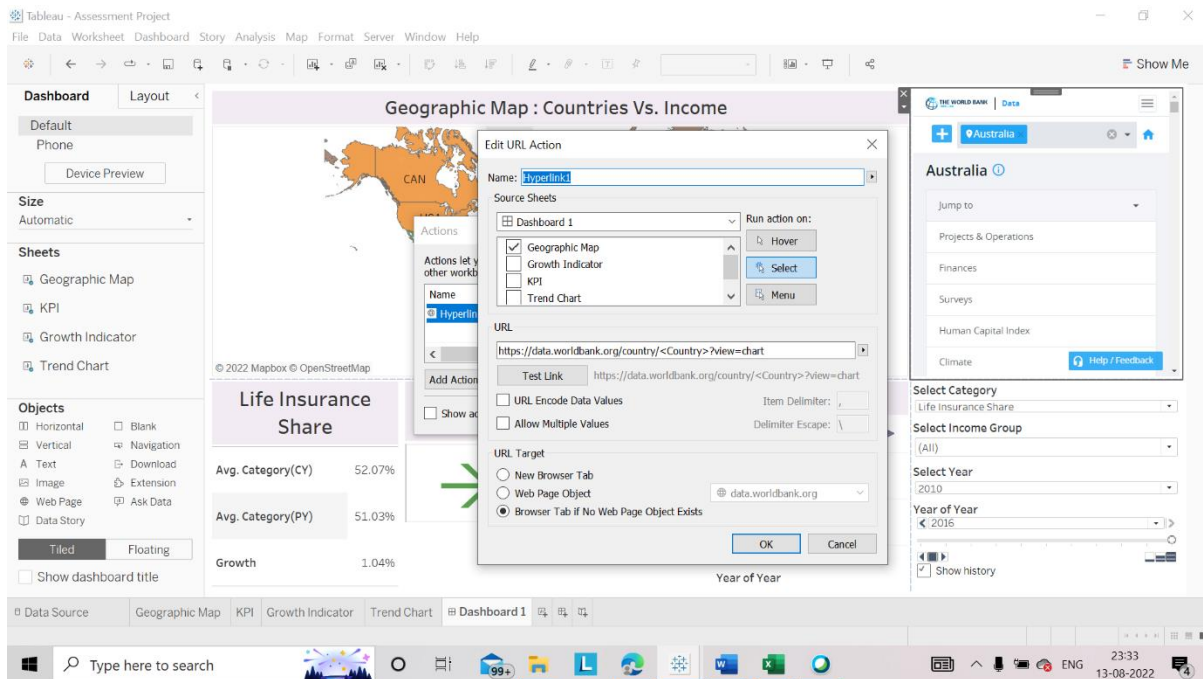
- The line shows an arrow or triangle at the last mark
- To Create Trend Chart: Go to New sheet and rename it Trend Chart.
- Click on Parameters and Show Parameter.
- Drag Year to Columns and Select Category Measure to Rows.
- Drag Year to Pages [To make a Motion Chart] and click on Show history and Trails.



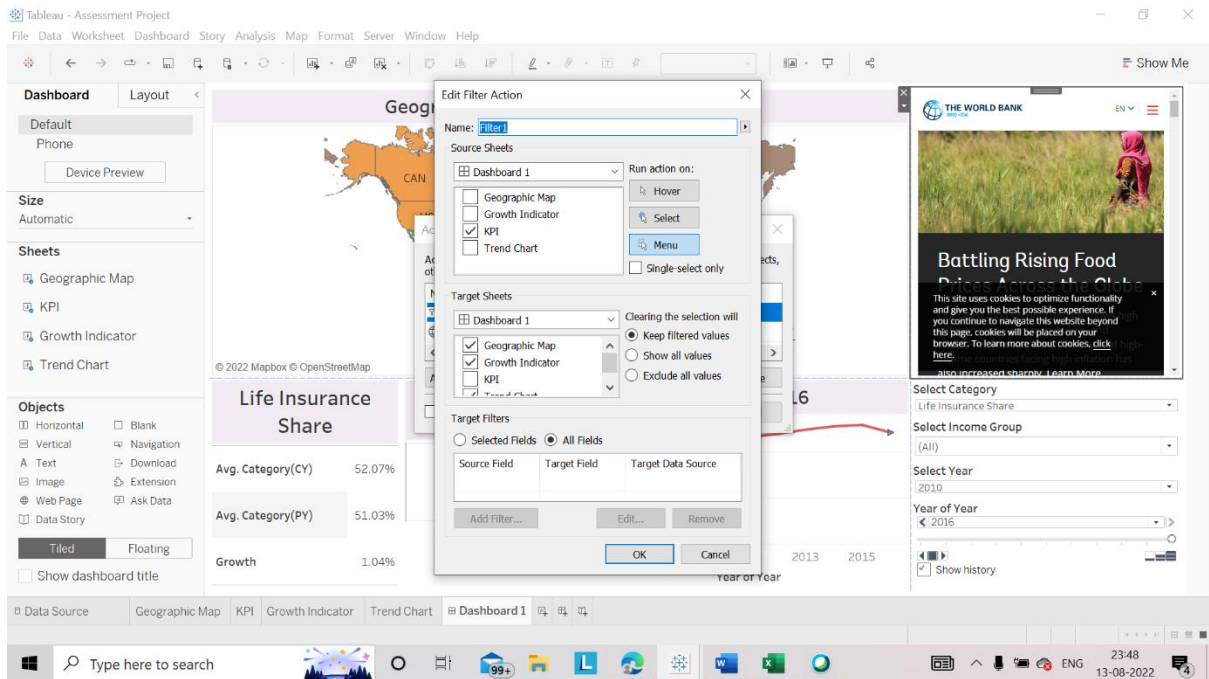
5. Create a dashboard filter for income group to be applied for all charts with the filter action enabled in the map as well. Include a webpage to show data from the world bank webpage driven by an URL action from a geography graph

- The country names in the map will act as the trigger
<https://en.wikipedia.org/wiki/Country>

- Create a Dashboard: Click on Dashboard button .
- Go to Size and click Automatic.
- Drag Map to sheet
- From Objects drag web Page to sheet. Then Go to Dashboard , Click Action -> add action -> go to URL -> edit action-> Source sheet -> Geographic Map and Run action -> Select And add URL in URL bar.



- Go to Object , the drag Horizontal Tab again. -> add KPI sheet, Growth Indicator sheet and Trend Chart sheet and rearrange it.
- Then click on Select Income Filter -> More options -> Apply to Worksheets -> Selected worksheet -> click on "Select All on Dashboard". Then click on Dashboard -> click on actions -> add action -> filter-> edit filter -> source sheet -> KPI table, Target sheet-> All except KPI table
- Run on action -> Click on Select



7. Formatting should be done appropriately

Dashboard ready to slideshow.

