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Key Indicator Dashboard: Tableau Assessment – Writeup

Problem Statement: Create a dashboard to do a comparative study on various parameters of different countries using the sample insurance dataset and world development indicators dataset.

1. We will follow the below set of instructions provided in the assessment to build the Dashboard

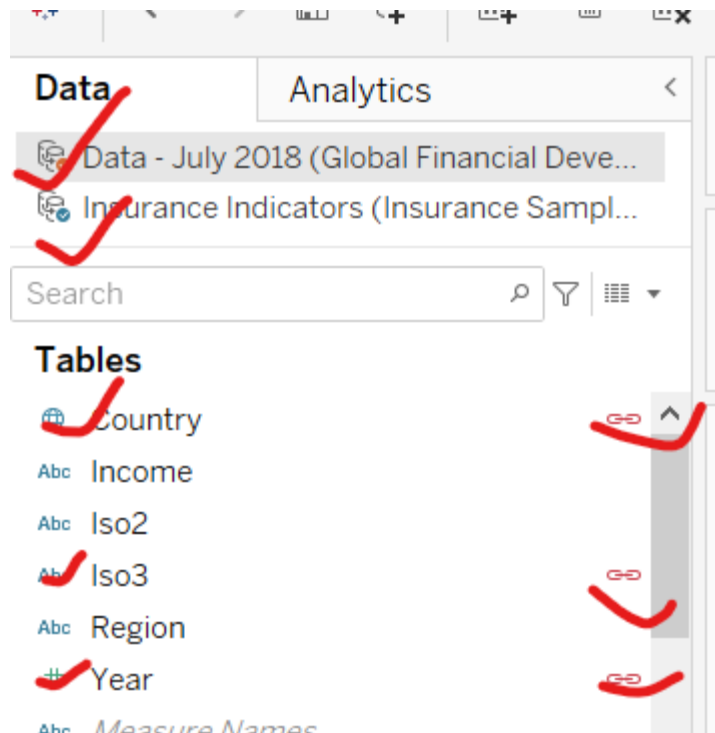
Solution:

Step1: Download the give sets of datasets (we have two files) and blend the two datasets

with with Relationships between Country Code, Country, and Year

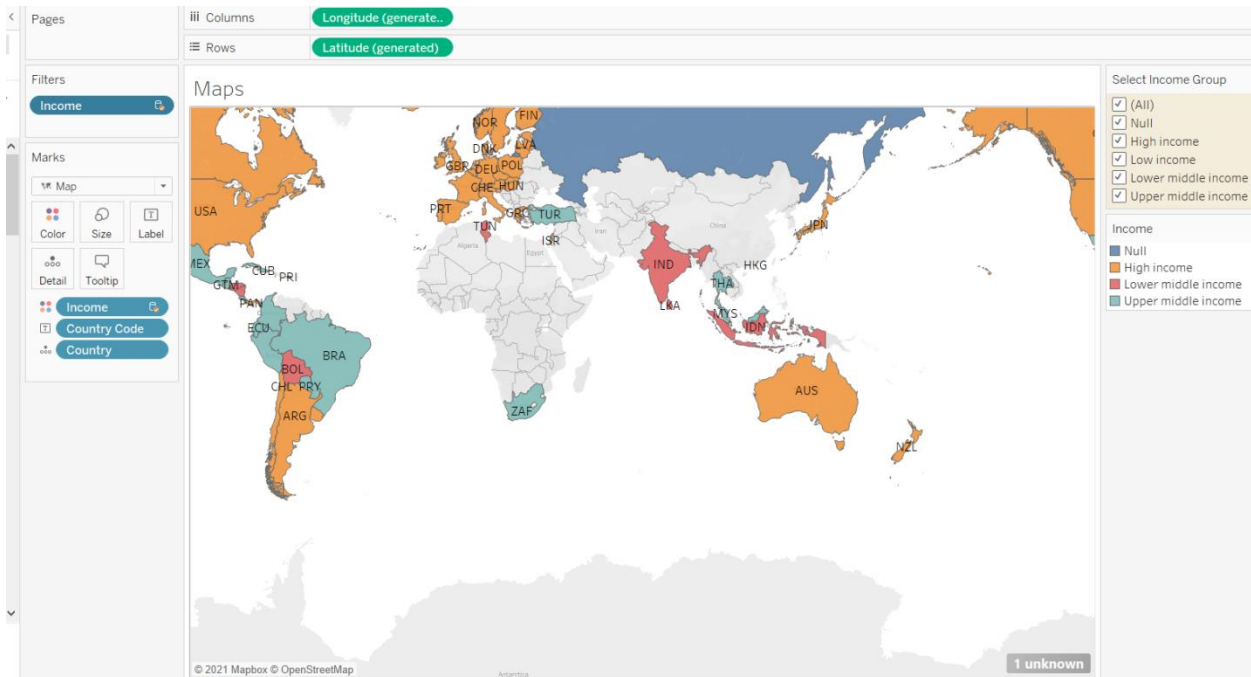
Primary Dataset – Insurance Sample Dataset

Secondary Dataset – Global Financial Development Database



Iso3 in secondary dataset = country code in Primary dataset

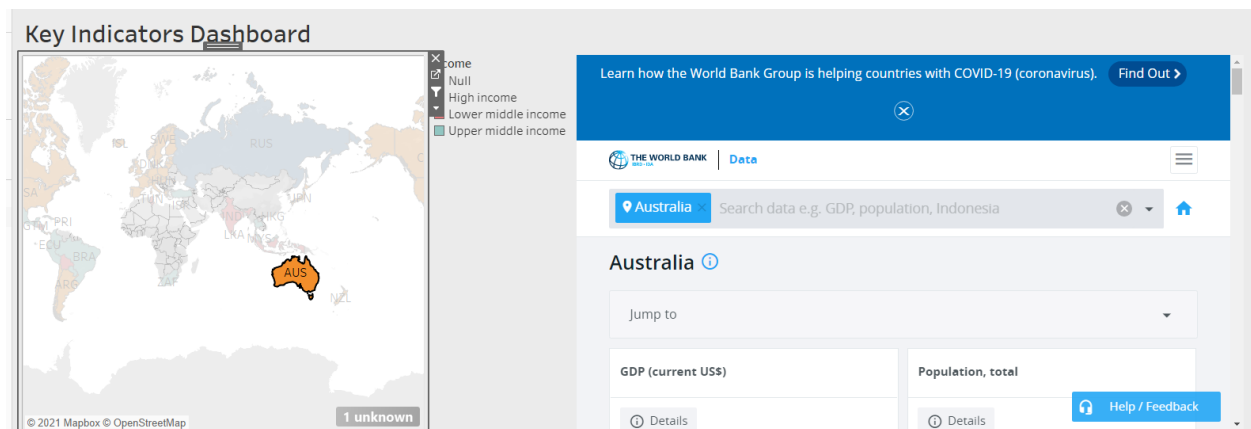
Step2: Once the primary and secondary dataset relationship is established using blending, create a map chart as shown below



Step3:

1. Create A Dashboard and bring the Map Chart to the Dashboard
2. Also using the Web page Object, we create a web page Object and update the given url link
3. Apply the Dashboard actions using hyperlink so that the webpage object is updated based on the country selection from the map

The output appears shown below



Step4:

Using parameters and calculated field we derive the **selected period value, Comparison Period value and Growth %** for a given year and given category

Year Parameter

Edit Parameter [Year Selection]

Name: Year Selection

Properties

Data type: Integer

Current value: 2,016

Value when workbook opens: Current value

Display format: Automatic

Allowable values: ☐ All ☒ List ☐ Range

List of values

Value	Display As
2,006	2,006
2,007	2,007
2,008	2,008
2,009	2,009
2,010	2,010

☒ Fixed ☐ When workbook opens

Add values from

None

Clear All

OK Cancel

Category Parameter

Edit Parameter [Category Selection]

Name: Category Selection

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 Sh...	Life Insuranc...
Market Share	Market Share
Penetration	Penetration
Ratio of Reinsura...	Ratio of Rein...
Retention Ratio	Retention Ratio

☒ Fixed ☐ When workbook opens

Add values from

None

Clear All

OK Cancel

Calculated fields:

Category Value: This field is calculated who whenever the parameter Category is selected, the corresponding values of each category is being rendered

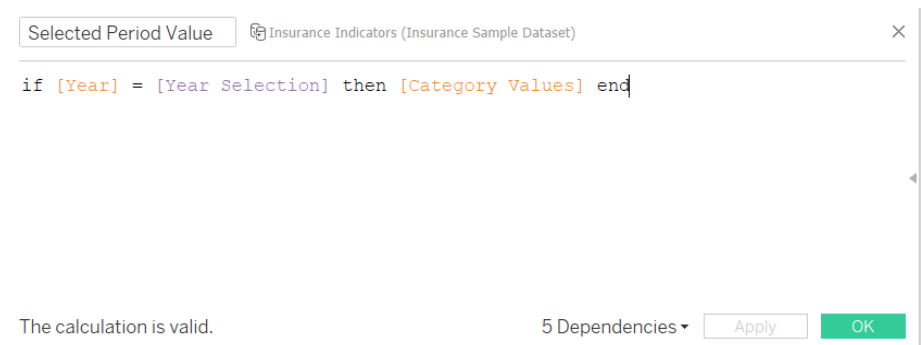
Category Values Insurance Indicators (Insurance Sample Dataset)

```
if [Catgory Selection] = 'Life Insurance Share' then ([Life insurance share])  
elseif [Catgory Selection] = 'Market Share' then ([Market share > Total])  
elseif [Catgory Selection] ='Penetration' then ([Penetration > Total])  
elseif [Catgory Selection]='Retention Ratio' then ([Retention ratio > Total])  
else ([Ratio of reinsurance accepted > Total])  
END
```

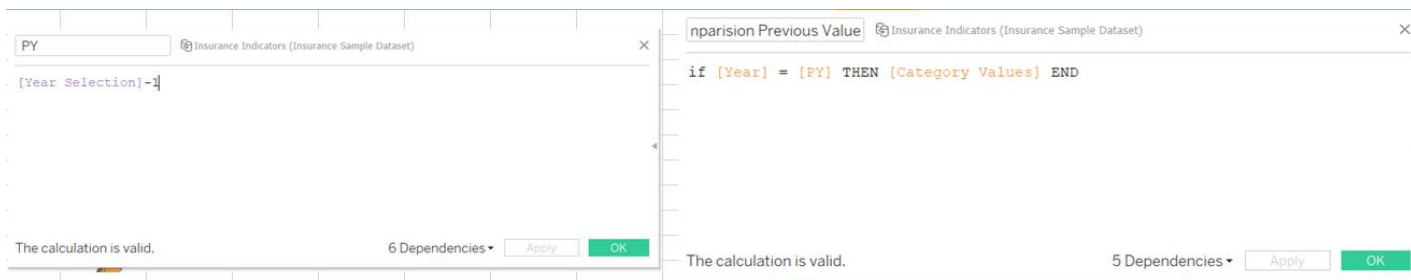
The calculation is valid. 8 Dependencies

Apply OK

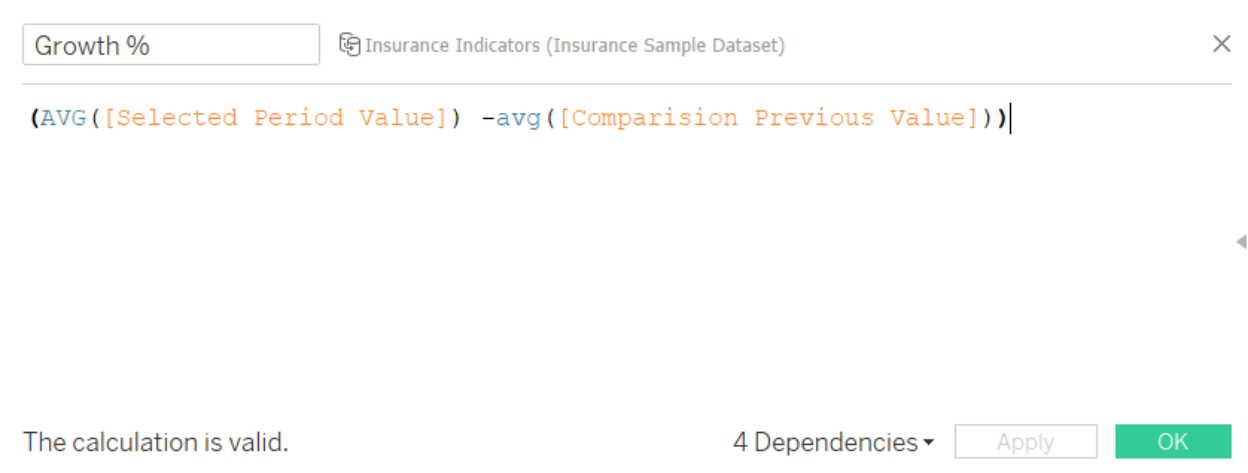
Selected Period Value: This calculated field will render the Category values for the selected year, using the Year field from the dataset and the Selected Year parameter



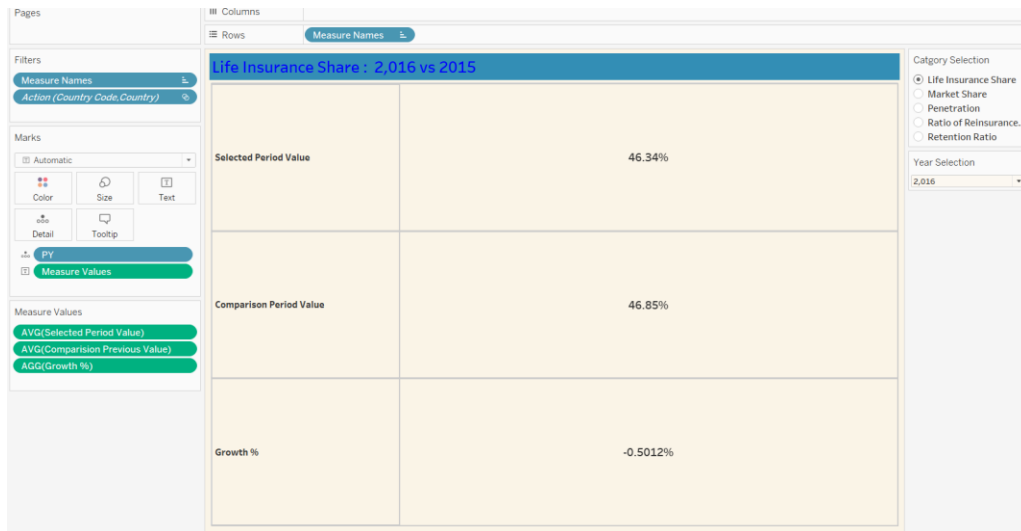
Comparison Previous Value: This is calculated field to render the previous year values (i.e. selected Year minus 1) and to do that we need to create one Previous Year (PY) placeholder calculated field



Growth % : This calculated field is created to show the growth from Previous year to current Year. Since the values are already in %, therefore we applied the below formula



So, using the above calculated fields we create the below chart



Step5: Creating the Growth Indicator using another calculated field

Grow Indicator

Insurance Indicators (Insurance Sample Dataset)

```
if [Growth %] >0 then 'Green'
elseif [Growth %] = 0 then 'Yellow'
else 'Red' end
```

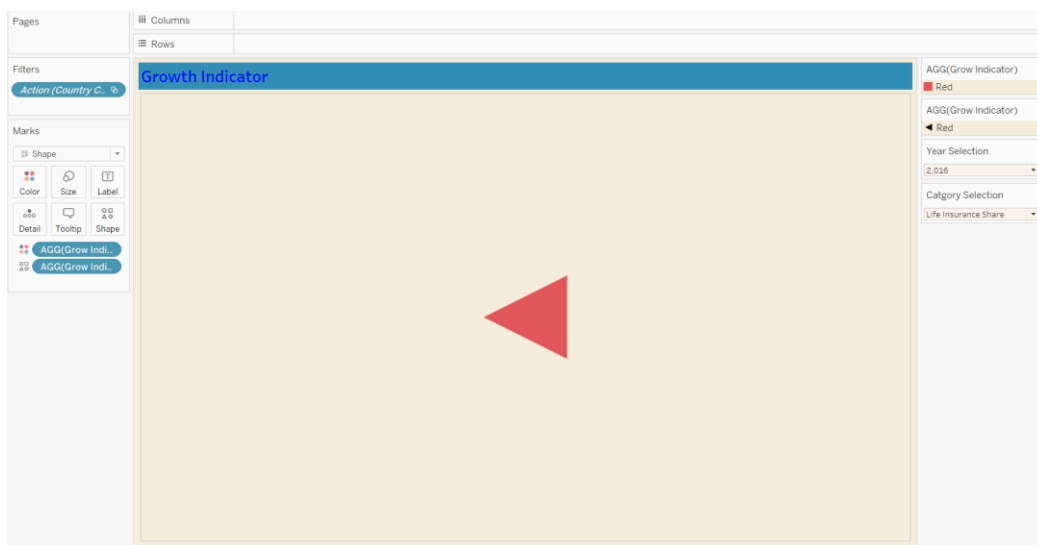
The calculation is valid.

2 Dependencies

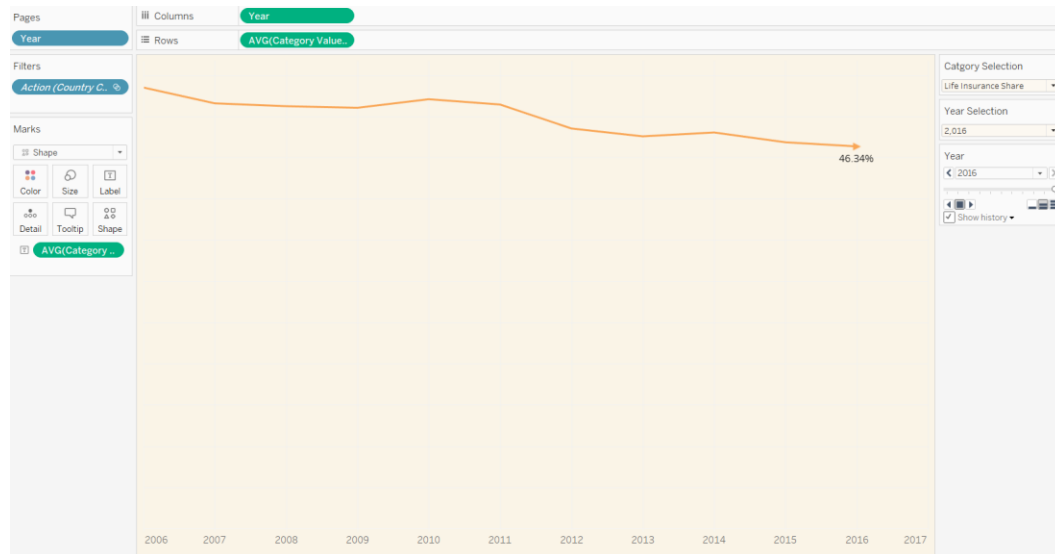
Apply

OK

And the chart as below



Step6: Also, created the trend line using the Year to the pages



Step7: Using all these charts, updated the Dashboard pages and applied the formatting accordingly as shown below

Final Dashboard: [2nd Dashboard - Sujit Sonar | Tableau Public](#)

