

Assignment 2&3

Using the Financial Sample dataset, create a Power BI report to monitor the company's financial KPIs for the 2014 fiscal year. The KPIs that must be easily visible are: Units Sold, Gross Sales, COGS (cost of goods sold) and Profit. The company wants to monitor and compare these KPIs, with the option to filter by country, segment, product and date. The end user should also be able to answer the following questions using this report:

- What is the best discount band for overall profit?
- Which discount band results in the most sales?
- Which segment is the most profitable? How does this compare by country?
- Which product is the most profitable? How does this compare by segment?

Content (4 marks) – June 16, 2023

- Questions can be answered using the visuals and filters

Data Model (4 marks) – June 16, 2023

- The data is in a star or snowflake schema

Date Table (2 marks) – July 14, 2023

- The data model includes a Date table

Required Visualizations (3 marks) – July 14, 2023

- Cards summarizing the KPIs
- Table or matrix with monthly totals and the YTD running total for:
 - o Units Sold
 - o Gross Sales
 - o COGS
 - o Profit
- Line chart showing monthly sales with a forecast (*hint: see Analytics view on the Visualizations pane*)

Required Report Features (5 marks) – July 14, 2023

- Drill through page or Page navigation
- Use a button for an action
- Tooltip showing a tooltip page (i.e. visual instead of the default black text box)
- Slicers and/or use of the filter pane
- Use of **at minimum one calculated measure or column**

Design (2 marks) – July 14, 2023

- Consistent theme throughout the report: fonts, font sizes, text colour
- Use of colour both in theme/branding and in differentiating dimensions
- Report passes the five questions in a dashboard critique