

Week 4 – Business Analytics Fundamentals – Sydney Campus




1. Review of Lecture 3
2. Tutorial Week 4
3. Attendance & Tutorial Questions - Recognising student participation and engagement specifically identifying those who are most actively involved!

Lecturer/Tutor: Dr. Farshid Keivanian

Tutorial Week 4



The document "Tutor_Week4_Business Analytics Fundamentals"


Sessions_BusinessAnalytics_Excel_PowerBI

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FarshidKeivanian
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1. Summary of Lecture 3

Extraction Transformation and Load?

Extract, transform, and load (ETL) is a process in [data warehousing](#) that involves

- extracting data from outside sources,
- transforming it to fit business needs, and ultimately
- loading it into the data warehouse.

ETL is important, as it is the way data actually gets loaded into the warehouse.



1. Summary of Lecture 3



Extract

- The first part of an ETL process is to extract the data from the source systems.
- Most Business Intelligence environments consolidate data from different source systems. Each separate system may also use a different data organization / format.
- Common data source formats are [relational databases](#) and [flat files](#).
- Extraction converts the data into a format for transformation processing

1. Summary of Lecture 3

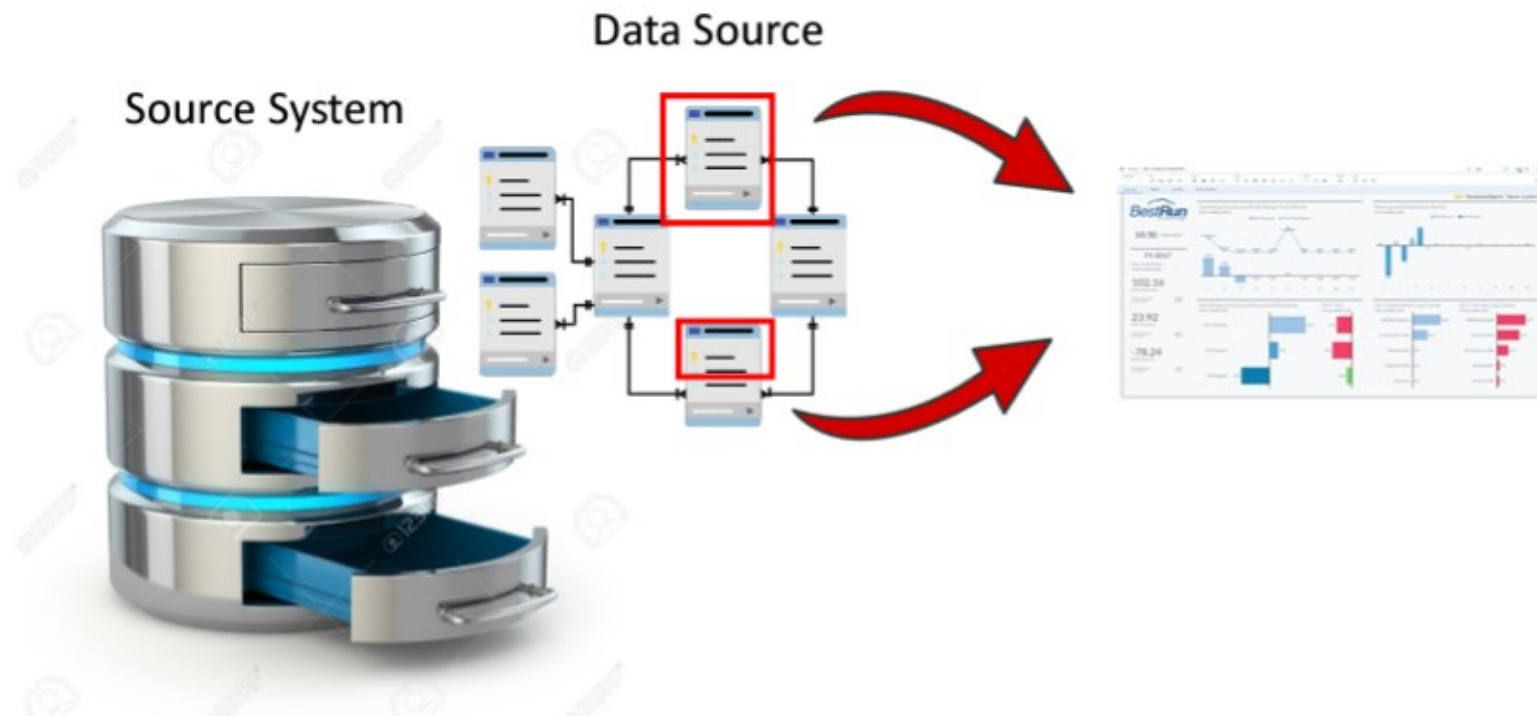
Sources of data



1. Summary of Lecture 3

Data Sources

Data Source = Source System > selected Tables > selected Fields > selected Data



1. Summary of Lecture 3

Let's consider some practical examples:

1. Australian Census Data Extraction:

- **Source System:** The Australian Bureau of Statistics (ABS) online database.
- **Extraction:** Data is pulled from the census, which includes demographic, economic, and housing characteristics of the population.
- **Transformation:** The data might be anonymized and summarized to ensure privacy and to provide insights at different geographic levels, such as states or local government areas.
- **Load:** Data is loaded into an analytical platform used by policymakers and researchers to monitor trends and make decisions.

1. Summary of Lecture 3

2. Retail Sales Data Integration:

- **Source Systems:** Various POS (Point of Sale) systems across retail chains in Australia.
- **Extraction:** Sales data, including transaction details, product information, and customer interactions, are extracted daily from different retail stores.
- **Transformation:** Data is cleaned and aggregated, product IDs are normalized, and sales metrics are calculated (e.g., total daily sales per product).
- **Load:** Consolidated data is loaded into a Business Intelligence tool to track performance, forecast demand, and optimize stock levels.

1. Summary of Lecture 3

3. Healthcare Patient Records System:

- **Source Systems:** Hospital and clinic electronic health record (EHR) systems.
- **Extraction:** Patient records including diagnoses, treatment information, and patient outcomes are extracted.
- **Transformation:** Identifiable information is encrypted or removed, records are standardized to a common format, and health outcomes are coded according to international standards.
- **Load:** Data is loaded into a central data warehouse for analysis, used to improve patient care and for medical research.

1. Summary of Lecture 3

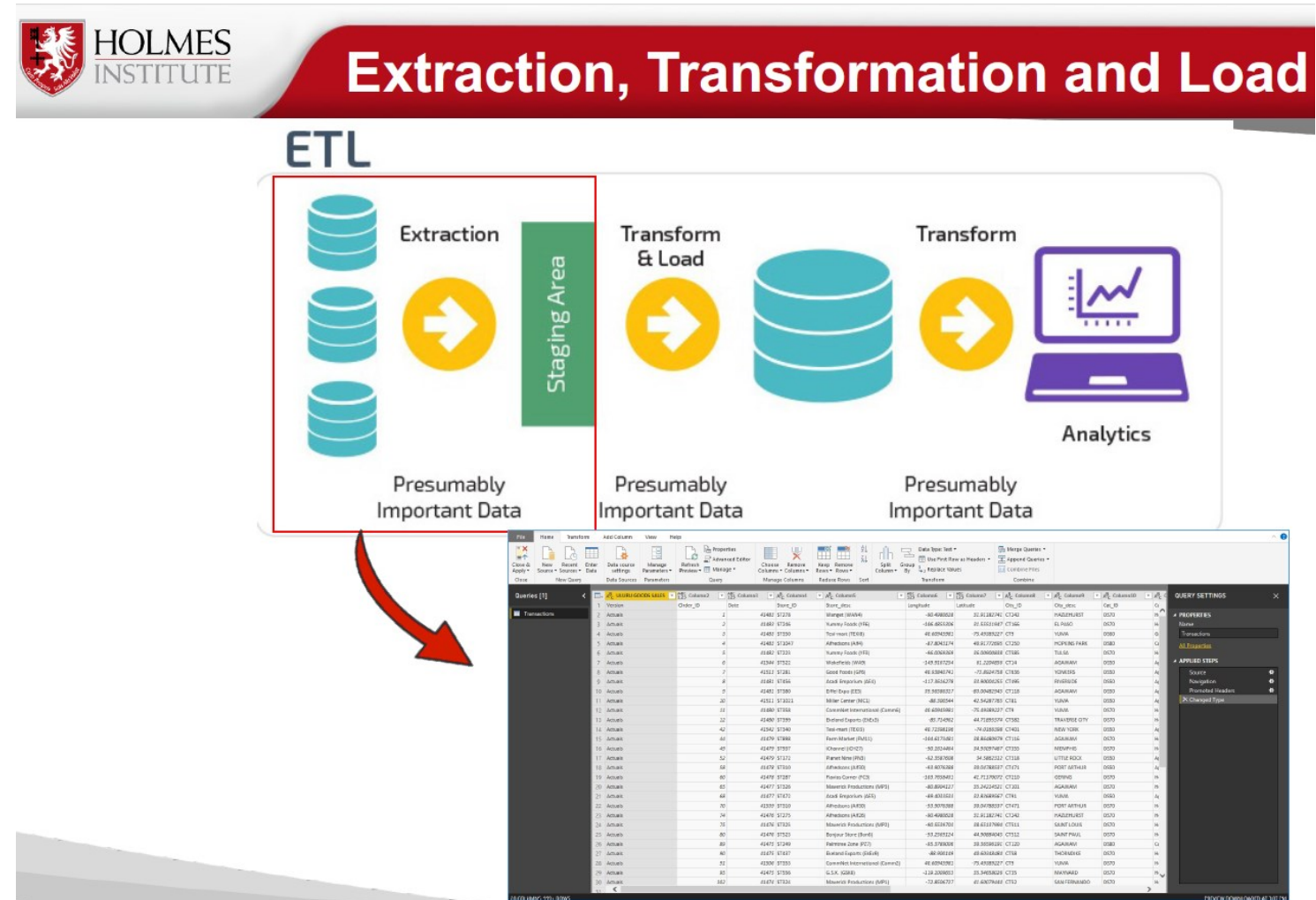
4. Financial Data for Credit Risk Assessment:

- **Source Systems:** Banking systems that contain account information, transaction details, and customer profiles.
- **Extraction:** Data on loan applications, repayment histories, and account balances are extracted from multiple banking systems.
- **Transformation:** Data is normalized, credit scores are recalculated, and risk profiles are updated.
- **Load:** The transformed data is loaded into a risk management system to assist with real-time credit risk assessment and decision-making.

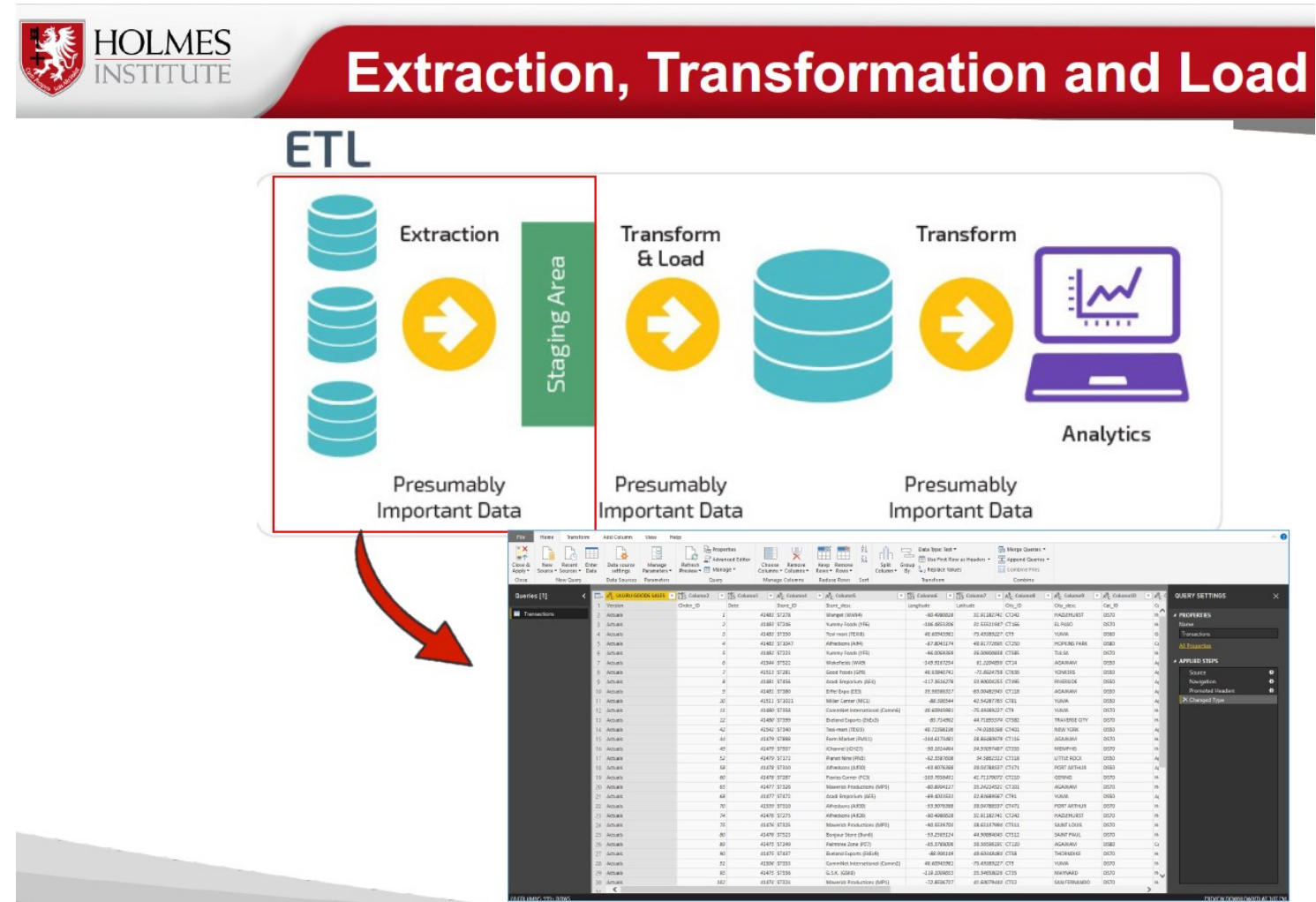
1. Summary of Lecture 3

5. Utility Usage Data for Energy Management:

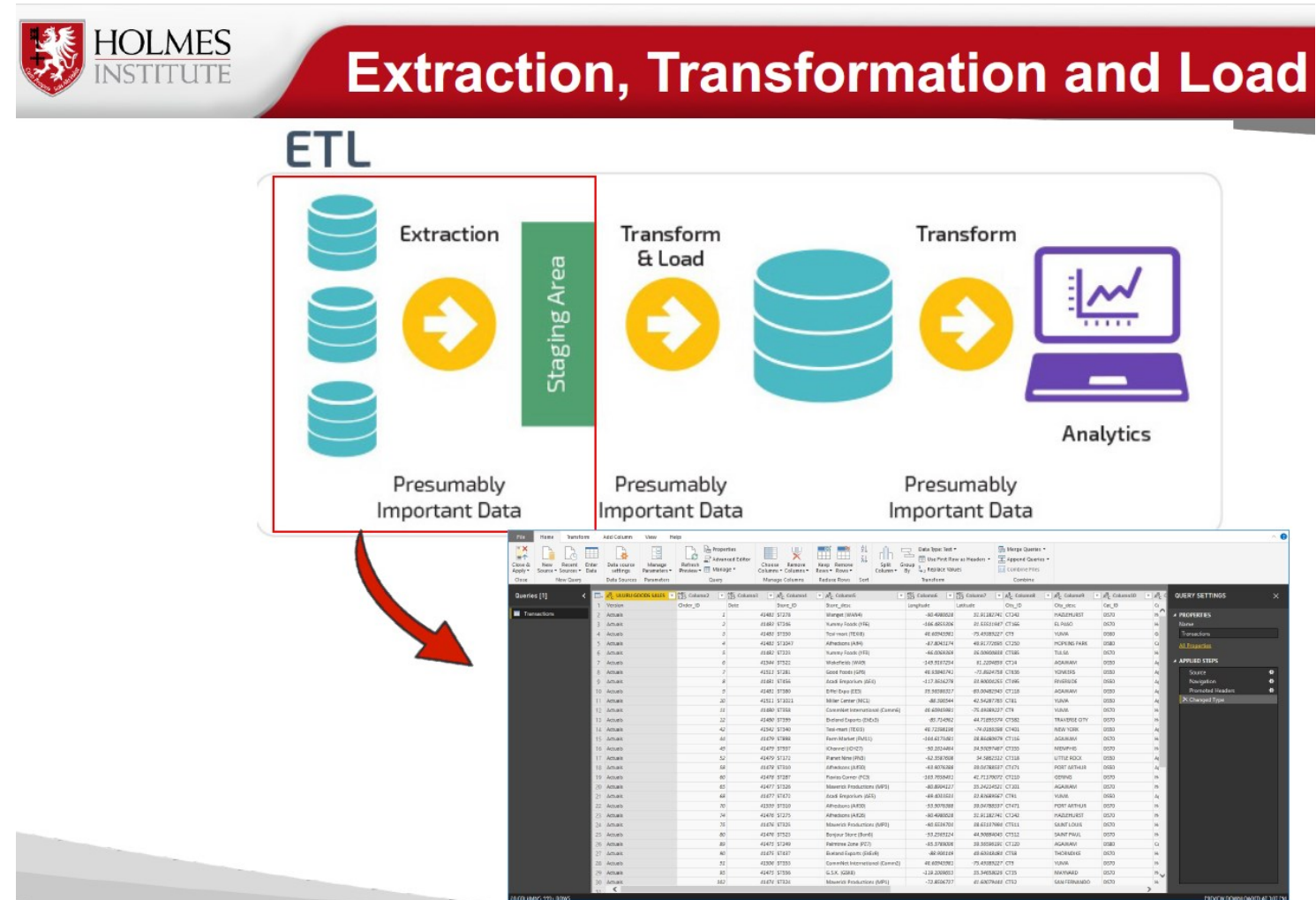
- **Source Systems:** Smart meters and IoT devices in homes and businesses across Australia.
- **Extraction:** Usage data for electricity, water, and gas are extracted at regular intervals.
- **Transformation:** Data is aggregated by region and time of use, anomalies are detected and corrected, and consumption patterns are analyzed.
- **Load:** Processed data is loaded into an energy management system to optimize grid performance, predict demand, and support sustainable energy use initiatives.



- In customer service data, various terms indicating customer satisfaction, such as "satisfied," "happy," or "content," might be encoded into a numerical satisfaction score (e.g., "1" for positive feedback) to allow for quantitative analysis.



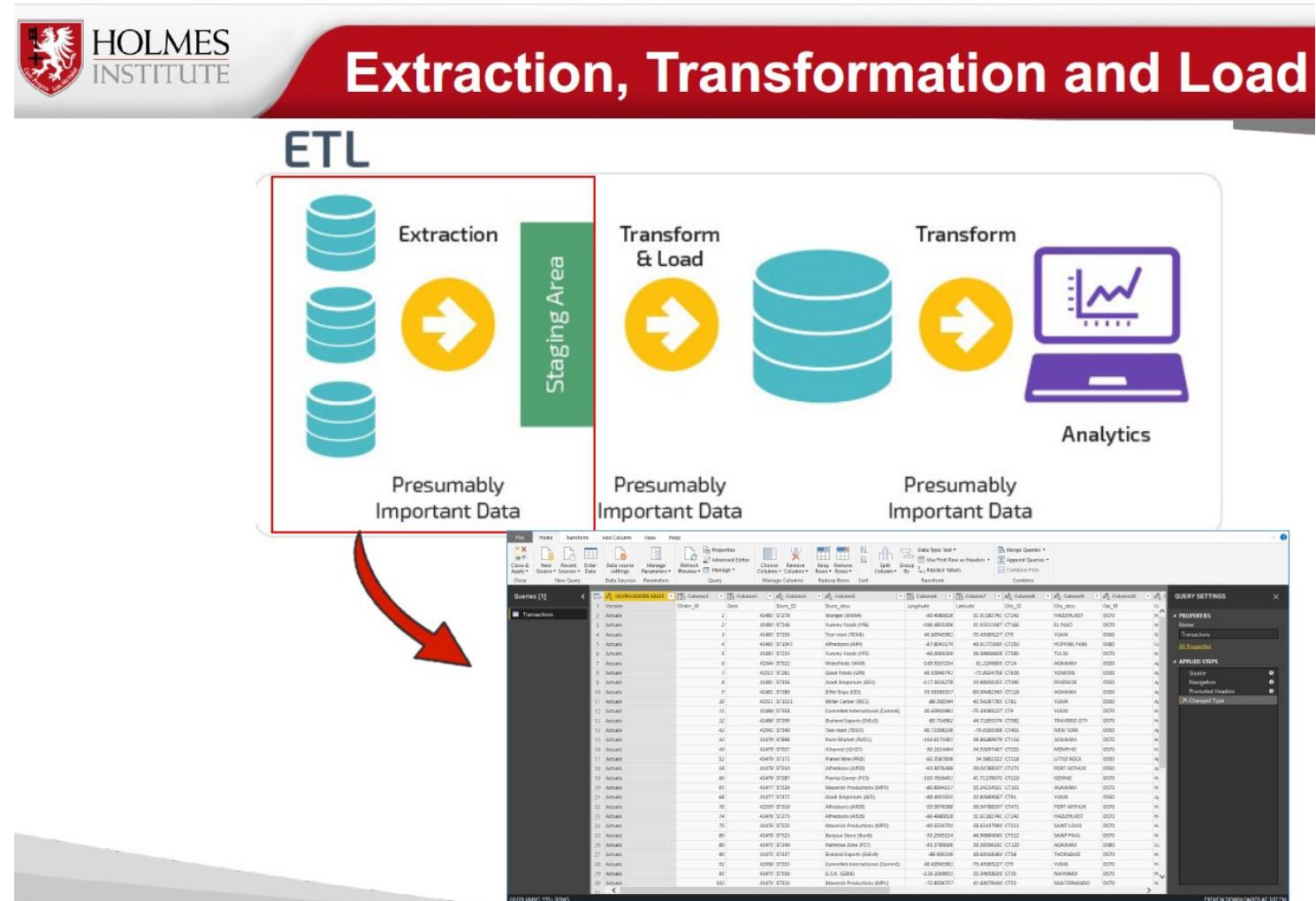
- An Australian online retailer might derive new calculated values, like total sales per transaction, by multiplying the quantity of items purchased by the unit price to analyze sales patterns and product performance.



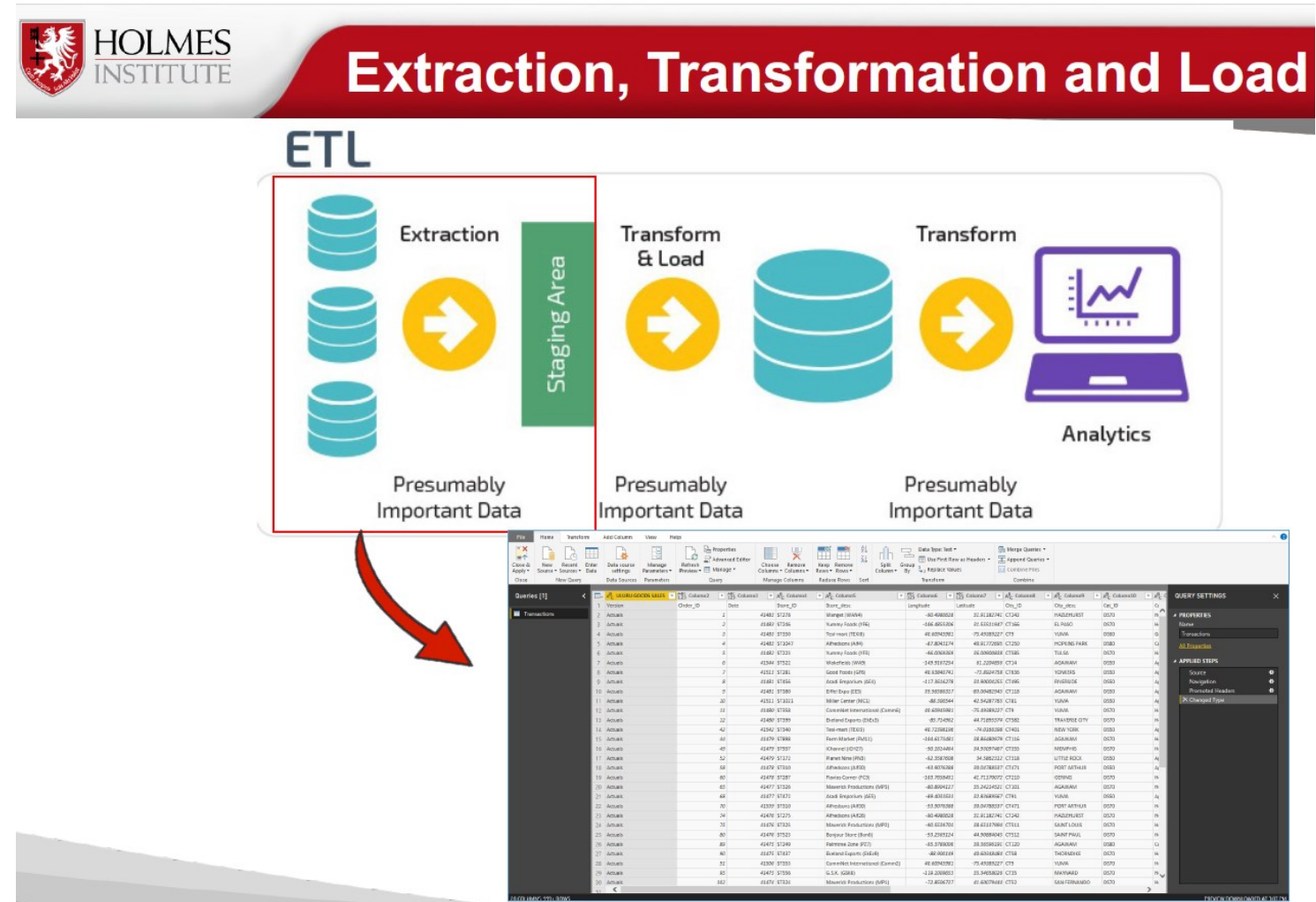
1. Summary of Lecture 3 - Practical Applications of the Transformation Techniques

5. Joining Data from Multiple Sources in Tourism Analytics:

- Tourism data might be merged from various sources, such as hotel bookings, attraction ticket sales, and transport usage, to get a comprehensive view of tourism trends and spending behaviors in different Australian regions.



Real estate agencies could summarize multiple rows of data to see the total number of sales per region or the average selling price of properties in different suburbs of cities like Sydney or Melbourne.

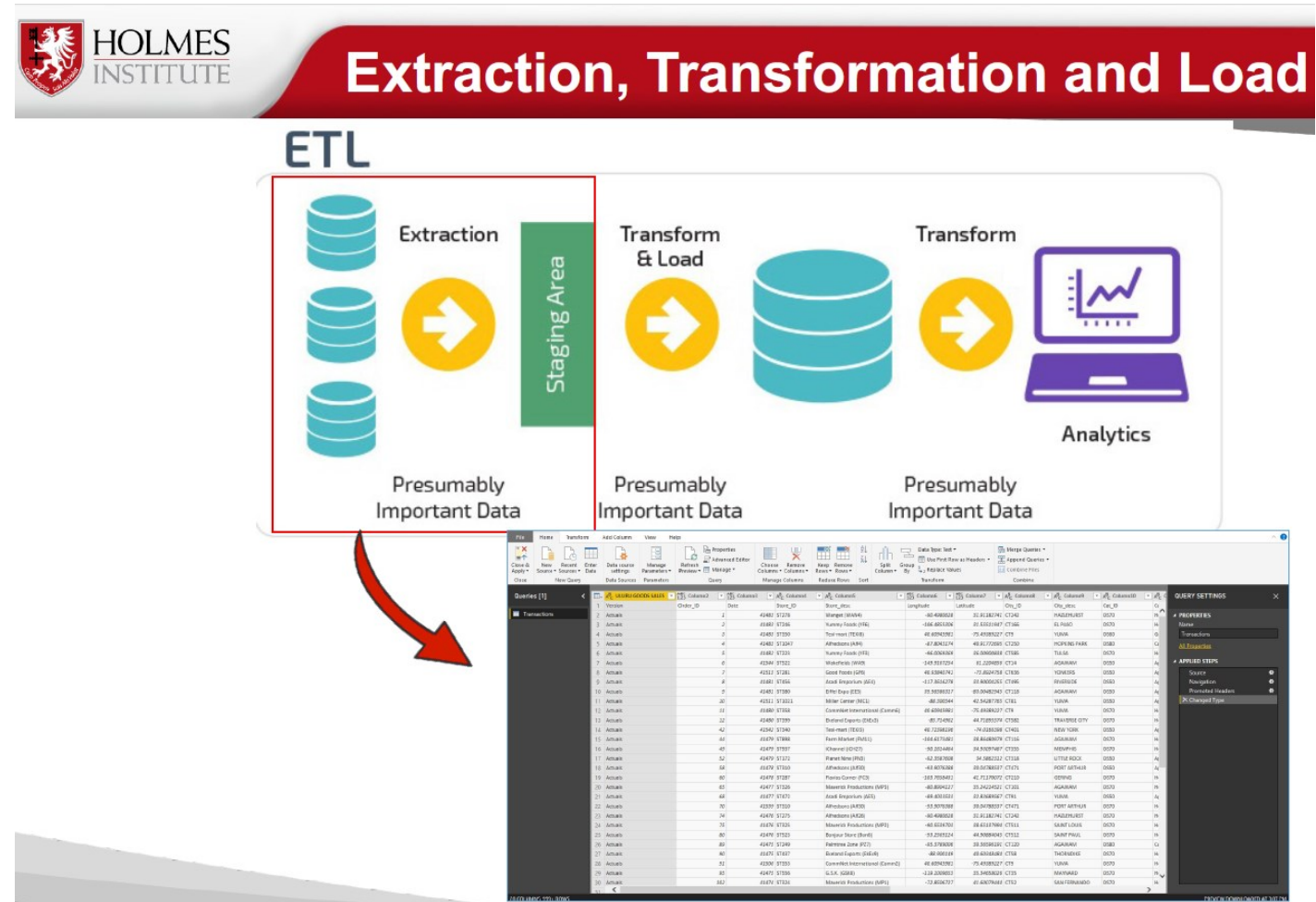


1. Summary of Lecture 3 - Practical Applications of the Transformation Techniques

7. Transposing or Pivoting Education

Data:

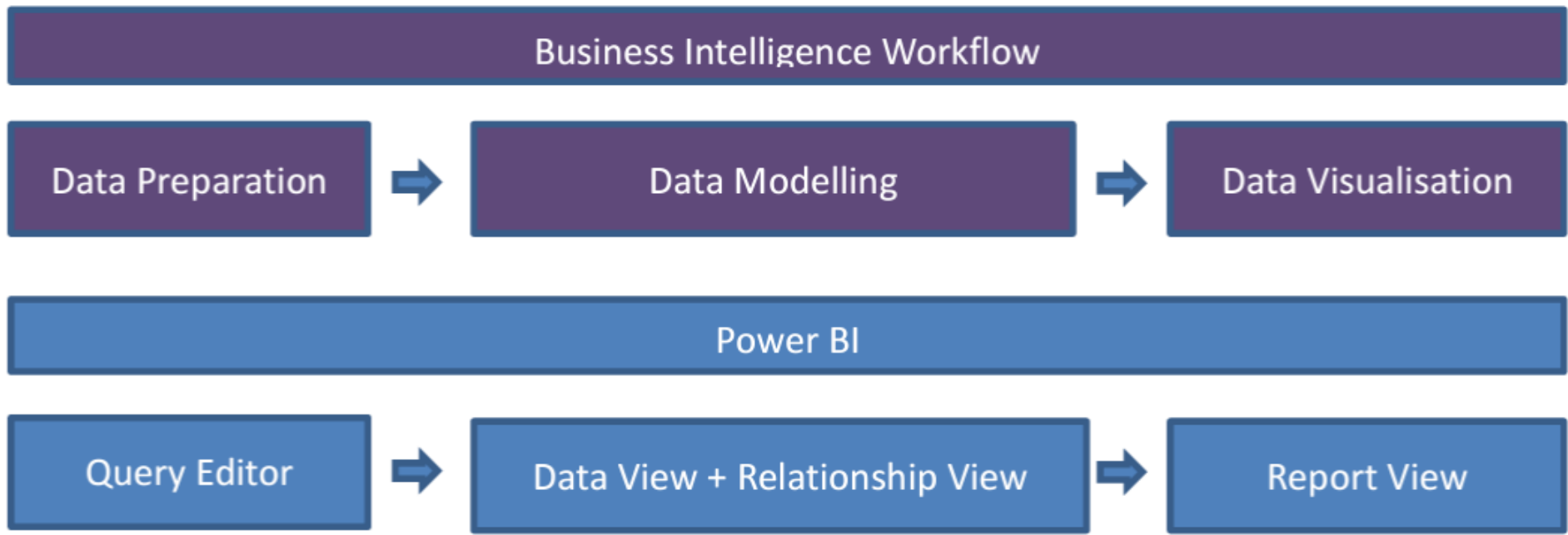
- In the education sector, schools might transpose yearly student performance data to compare subjects across different years or to track the performance of individual students over time.



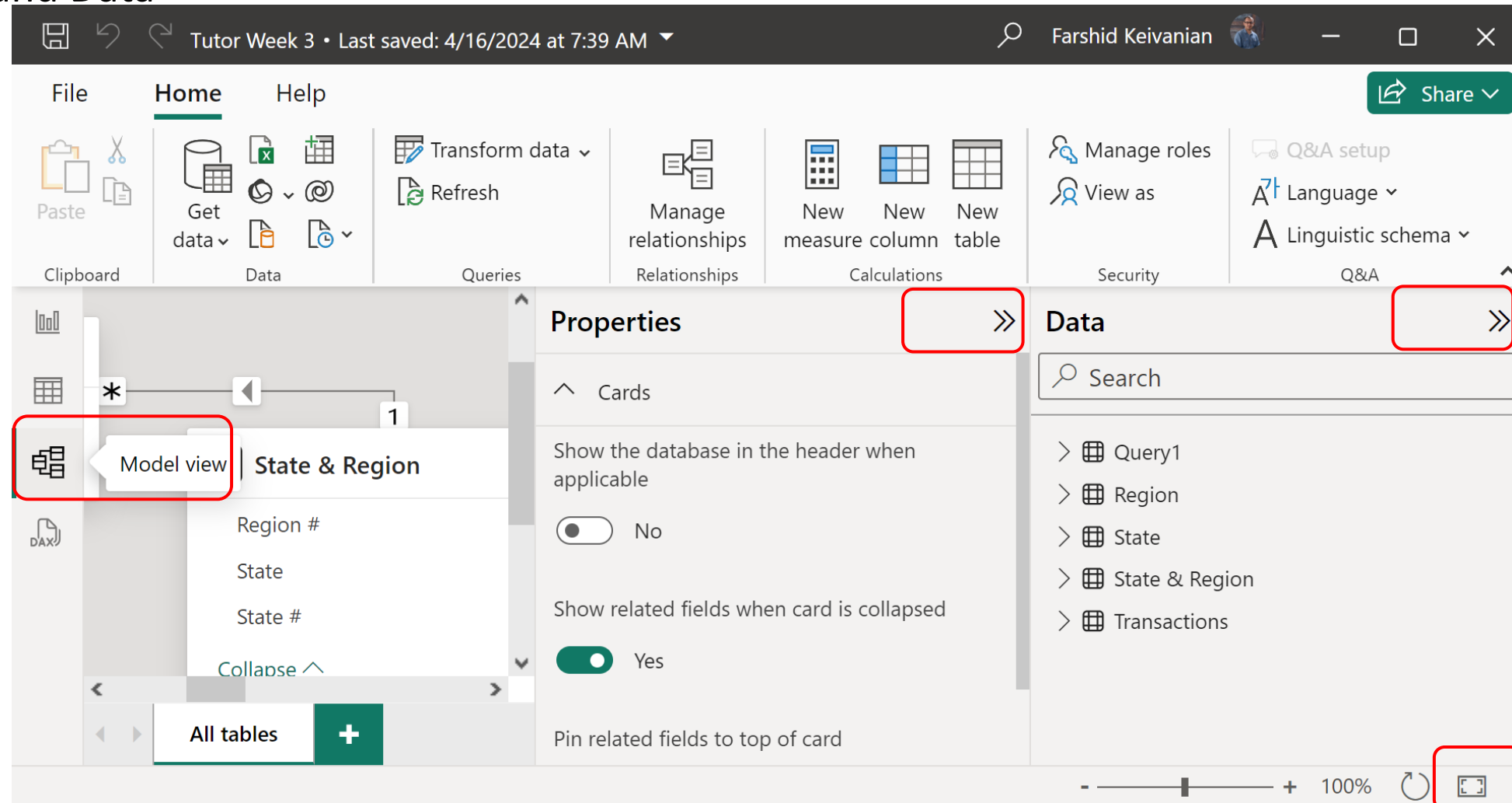
These examples show how data transformation is applied in various Australian industries, supporting the notion that the ability to effectively manipulate and prepare data is crucial in deriving valuable insights for business analytics.

2. Tutorial Week 4

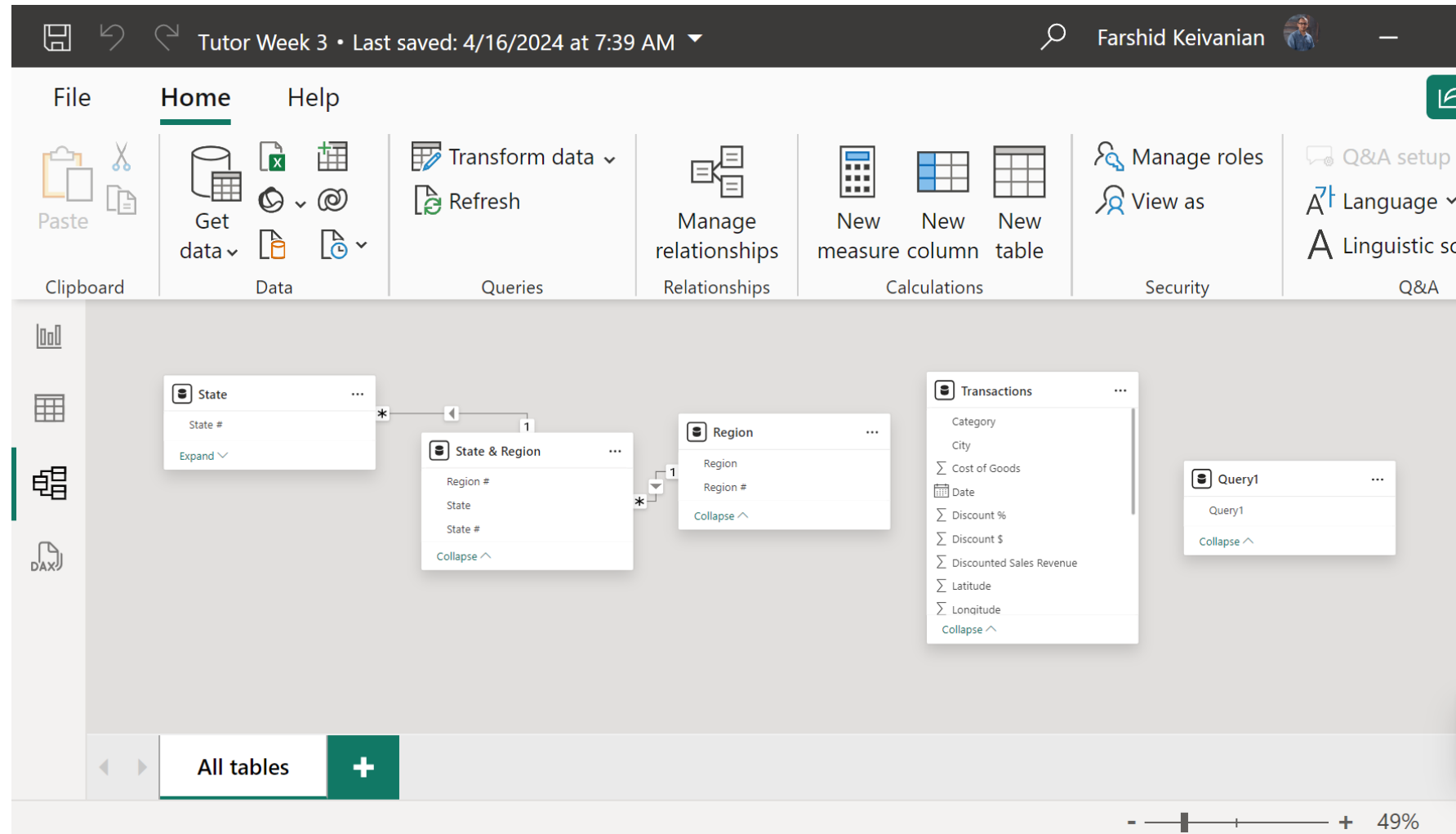
In the last session, we transformed the data in the queries by editing the headings, data types, deleted columns, created custom columns and removed null values. These activities can be referred to as Data Preparation. Data Preparation is usually the first step in the Business Intelligence workflow. The diagram below shows the Business Intelligence workflow and the associated tools in Power BI.



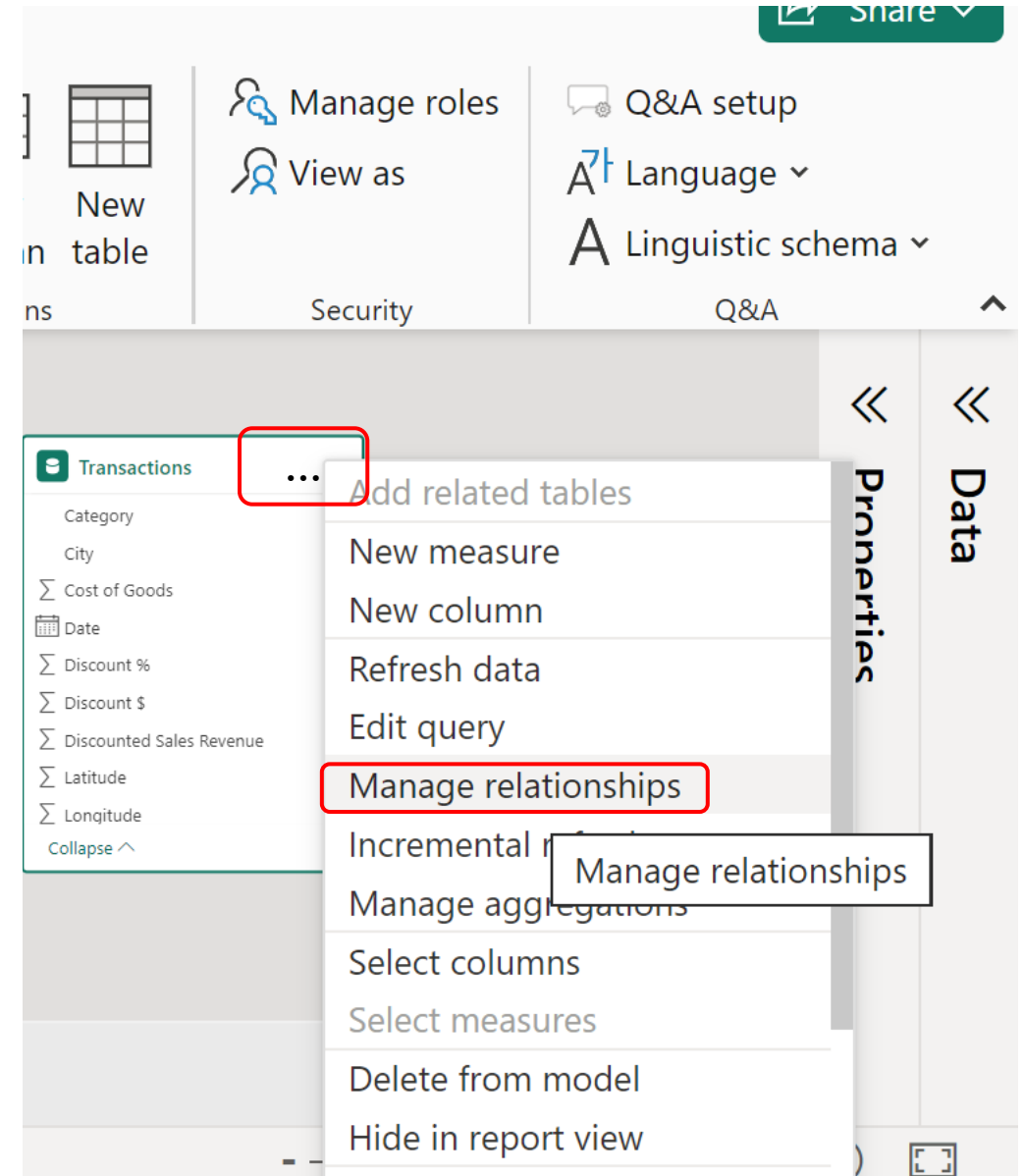
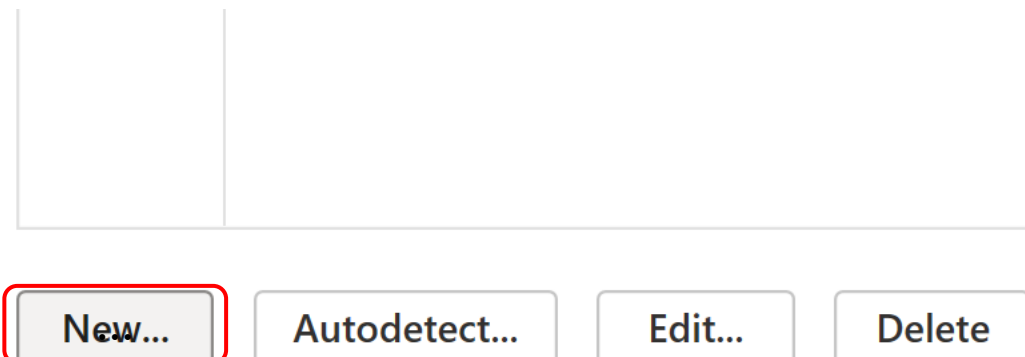
- Open 'Tutor Week 3.pbix'.
- Select Model View
- Collapse Properties and Data
- Select Fit to Page



- All the datasets appear on the screen and the datasets have automatically been related.
- If Power BI Desktop cannot determine with a high-level of confidence there is a match, it will not automatically create the relationship. You can manually create relationships between table.



- Click on ... at **Transactions**
- Select **Manage Relationships**
- Select **New**



- **Select Transactions and State**
- **Press Tab**
- **Select OK**

New relationship

Select tables and columns that are related.

Transactions

Version	Order_ID	Date	Store	Longitude	Latitude	City	Category
Actuals	310	Sunday, 30 October 2016	iChannel (iCH10)	-71.1036819	42.0970247	WEYMOUTH	Apparel
Actuals	372	Tuesday, 28 June 2016	Alfredsons (Alf32)	40.70941658	-74.0100709	NEW YORK	Apparel
Actuals	573	Tuesday, 7 June 2016	Finnys (Finn16)	40.71474749	-74.00042342	NEW YORK	Apparel

State

City	State #	Description	Column4	Column5	Column6	Column7	Column8
CT212	8050456	GILLETTE	null	null	null	null	null
CT486	8050456	RAWLINS	null	null	null	null	null
CT498	8050456	ROCK SPRINGS	null	null	null	null	null

Cardinality

Many to one (*:1)

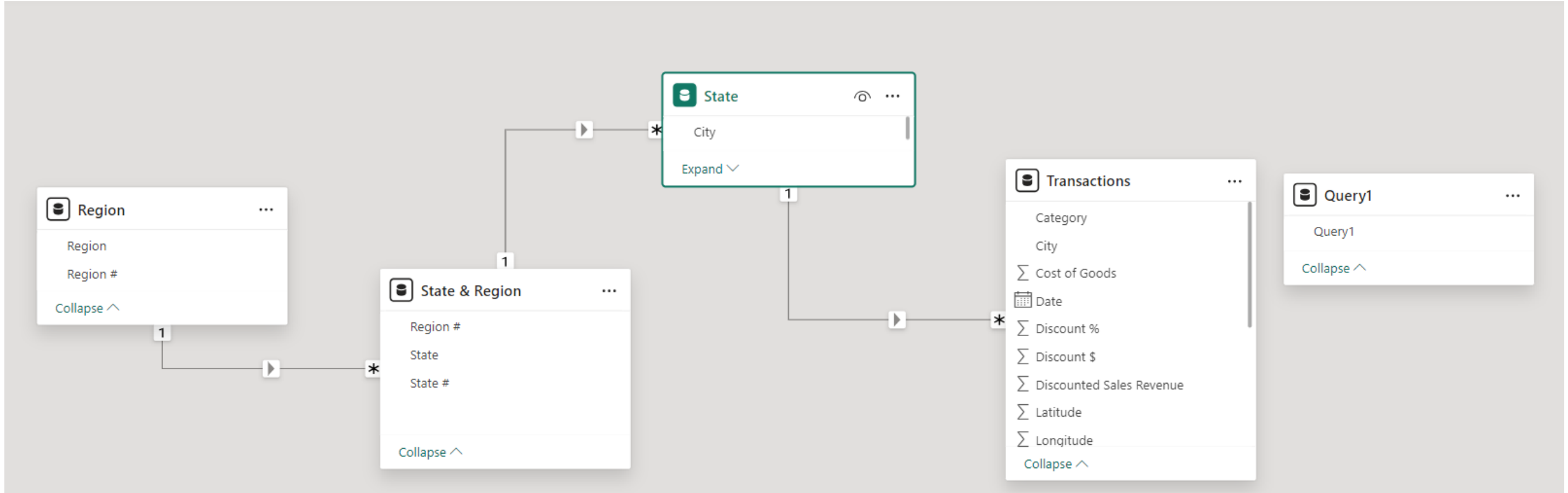
Cross filter direction

Single

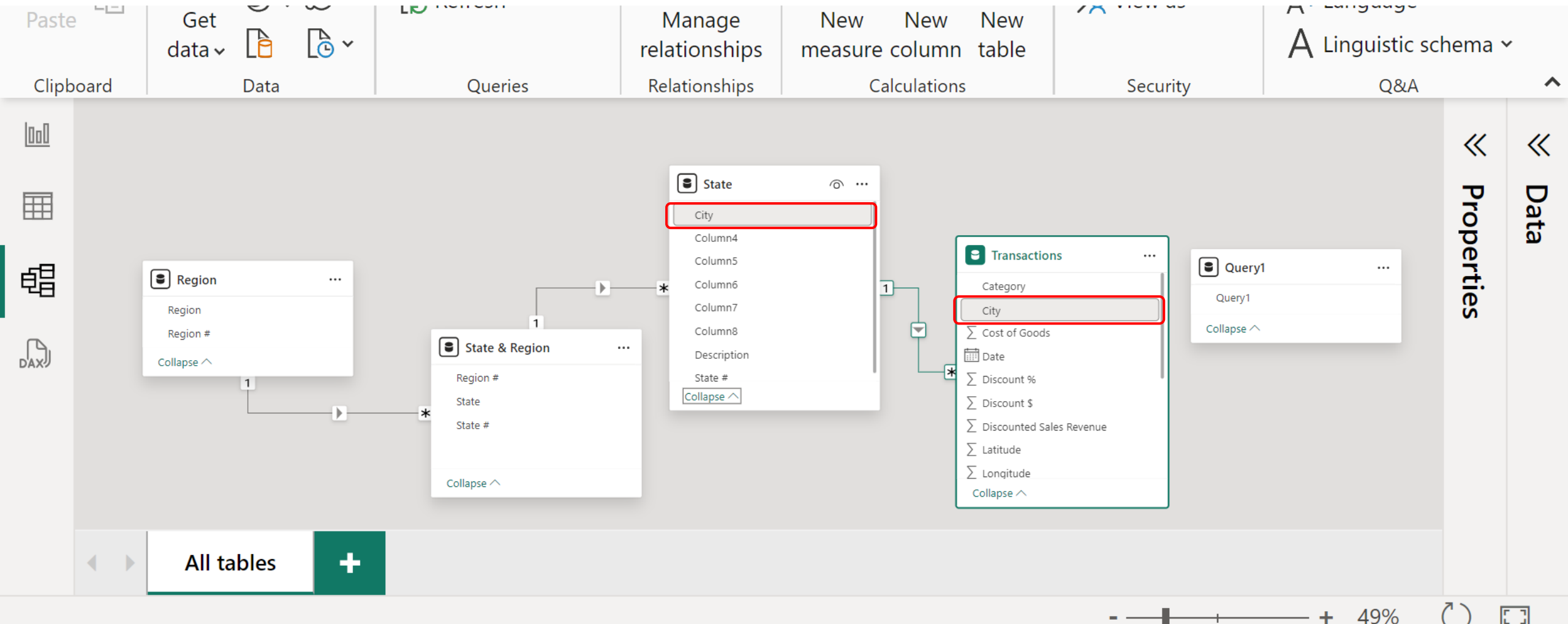
- | Active | From: Table (Column) | To: Table (Column) |
|--|---------------------------|--------------------------|
| <input checked="" type="checkbox"/> | State (State #) | State & Region (State #) |
| <input checked="" type="checkbox"/> | State & Region (Region #) | Region (Region #) |
| <input checked="" type="checkbox"/> | Transactions (City) | State (City) |
| <div> <input type="button" value="New..."/> <input type="button" value="Autodetect..."/> <input type="button" value="Edit..."/> <input type="button" value="Delete"/> </div> | | |

Close

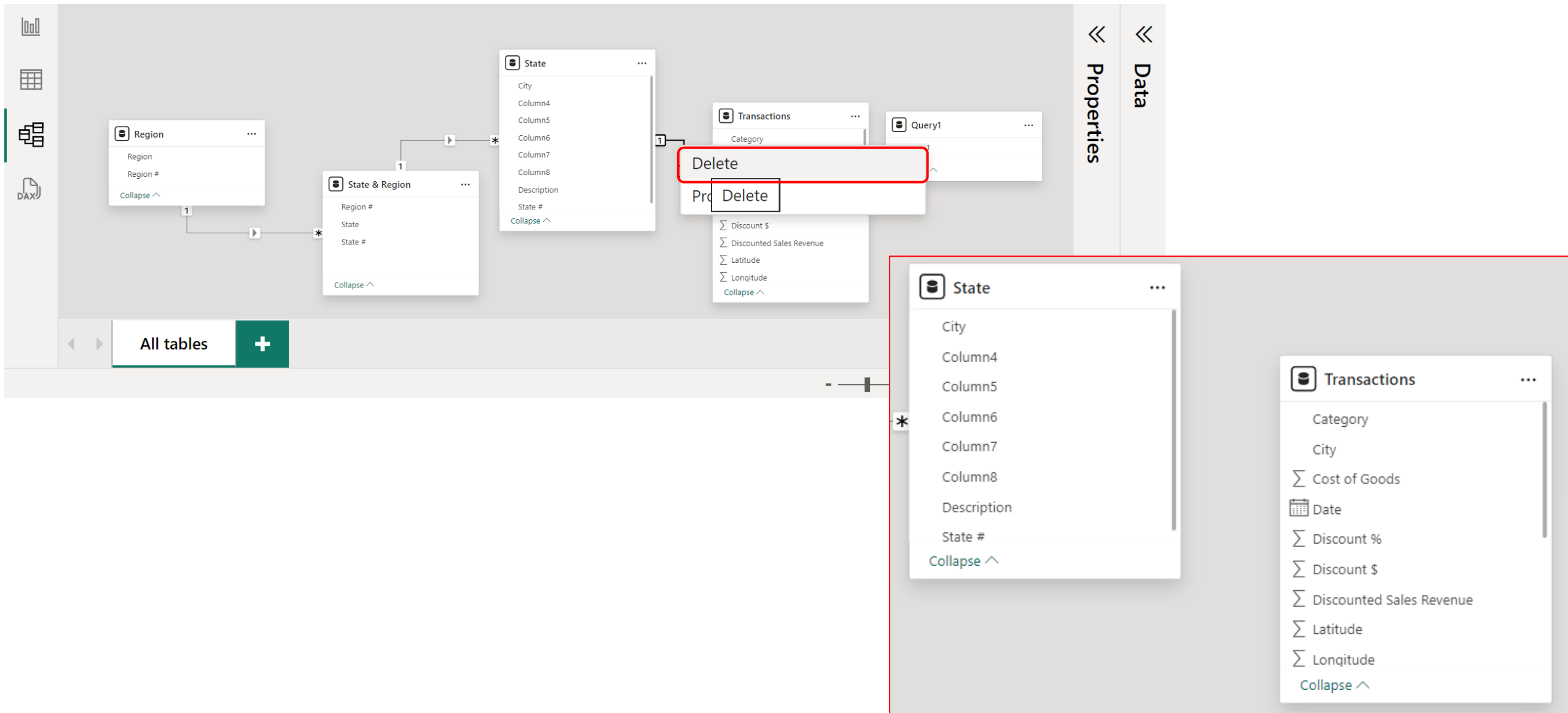
- Arrange them



- Move mouse over the join line between State and Transactions
- Notice that city in Transactions is joined to city in State



- Select the State-Transaction join line
- Right Click on it and choose **Delete**



- Re-create the relationship between city in Transactions and State

Tutor Week 3 • Last saved: 4/16/2024 at 7:39 AM

File

Home

Help

Paste

Get data

Transform data

Refresh

Manage relationships

New measure

New column

New table

Manage relationships

Incremental

Manage aggregations

Select columns

Select measures

Delete from model

Hide in report view

Clipboard

Data

Queries

Relationships

Calculations

Sec

Region

Region

Region #

Collapse

State & Region

Region #

State

State #

Collapse

State

City

Column4

Column5

Column6

Column7

Column8

Description

State #

Collapse

Transactions

Category

City

Cost of Goods

Date

Discount %

Discount \$

Discounted Sales Revenue

Latitude

Longitude

Collapse

Query1

Query1

Collapse

- Click **New**
- Select **Transactions** and **State**
- Press **Tab**
- Select **OK**
- Select **Close**

Version	Order_ID	Date	Store	Longitude	Latitude	City	Category
Actuals	310	Sunday, 30 October 2016	iChannel (iCH10)	-71.1036819	42.0970247	WEYMOUTH	Apparel
Actuals	372	Tuesday, 28 June 2016	Alfredsons (Alf32)	40.70941658	-74.0100709	NEW YORK	Apparel
Actuals	573	Tuesday, 7 June 2016	Finnys (Finn16)	40.71474749	-74.00042342	NEW YORK	Apparel
<div><div><div>⏪</div><div></div><div>⏩</div></div></div>							

Active	From: Table (Column)	To: Table (Column)
<input checked="" type="checkbox"/>	State (State #)	State & Region (State #)
<input checked="" type="checkbox"/>	State & Region (Region #)	Region (Region #)
<input checked="" type="checkbox"/>	Transactions (City)	State (City)

New...

Autodetect...

Edit...

Delete

ription	Column4	Column5	Column6	Column7	Column8
ETTE	<i>null</i>	<i>null</i>	<i>null</i>	<i>null</i>	<i>null</i>
'LINS	<i>null</i>	<i>null</i>	<i>null</i>	<i>null</i>	<i>null</i>
< SPRINGS	<i>null</i>	<i>null</i>	<i>null</i>	<i>null</i>	<i>null</i>

Cross filter direction

Single

☐ active

☐ Apply security filter in both directions

tegrity

OK

Cancel

- Move Mouse over to see the relationship between City in Transactions and City in State

Home

Help

Get data

▼

▼

▼

Data

Transform data

▼

Refresh

Queries

Manage relationships

Relationships

New measure

New column

New table

Calculations

Manage roles

View as

Security

Q&A setup

Language

Linguistic s

Q&A

Region

Region

Region #

Collapse ^

State & Region

Region #

State

State #

Collapse ^

State

City

Column4

Column5

Column6

Column7

Column8

Description

State #

Collapse ^

Transactions

Category

City

Cost of Goods

Date

Discount %

Discount \$

Discounted Sales Revenue

Latitude

Longitude

Collapse ^

Query1

Query1

Collapse ^

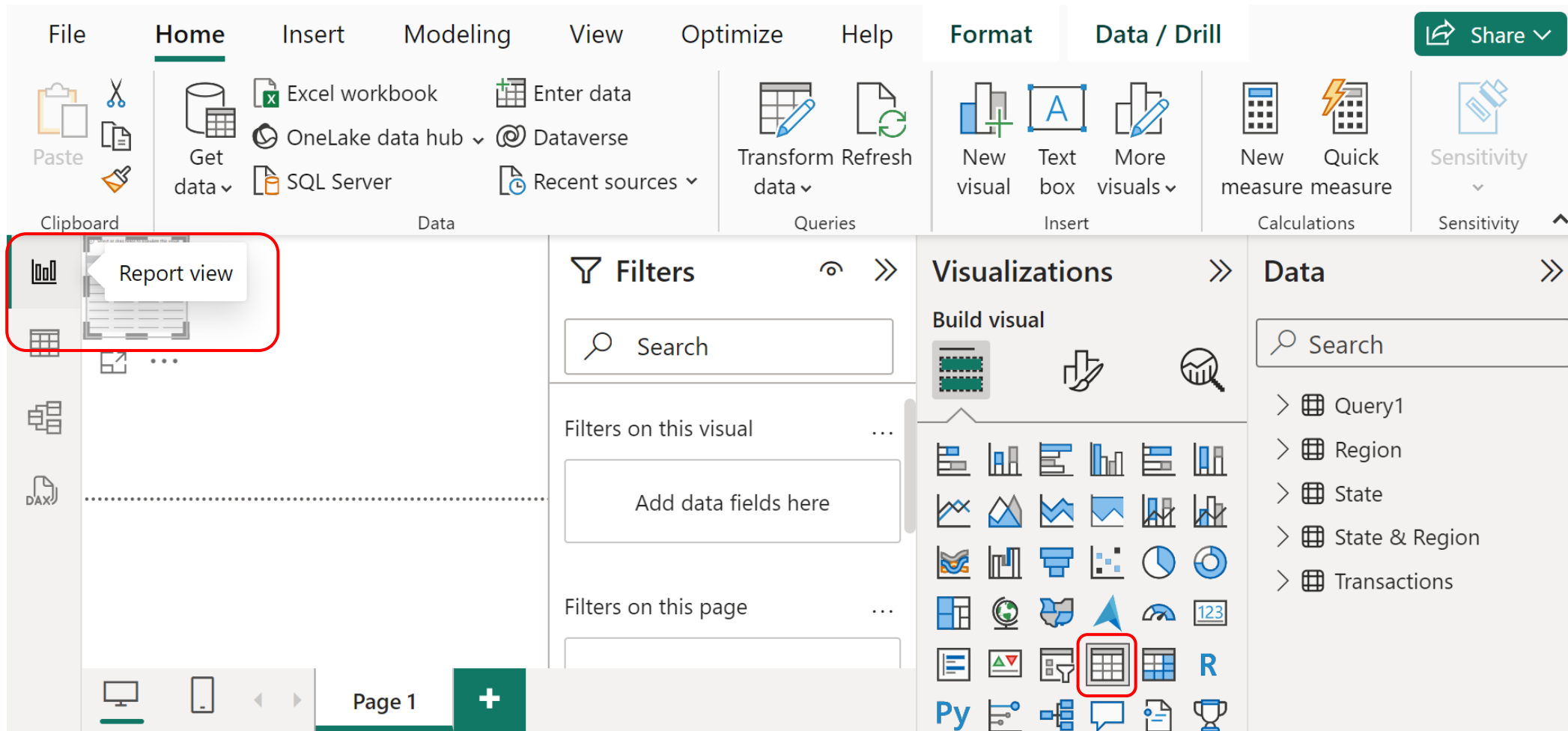
All tables

+

2. Tutorial Week 4 – Visualising Data

The visualisations can be the basis for a report. You have been asked to create a report that lists the total Profit by Region, by State, by City.

- Select **Report View**
- **Table**



2. Tutorial Week 4 – Visualising Data

- Collapse Visualizations, and Filters.
- Expand Data
- From Region Select Region, then this field will be added to the Table and the data will be displayed
- From State & Region Select State
- From Transactions Select City
- From Transactions Select Profit

City	Sum of Profit
AGAWAM	\$50,477.1526
EAU CLAIRE	\$2,240.1514
EDDINGTON	\$1,207.3952
EDENTON	\$396.8537
EDGARD	\$413.7355
EDISON	\$670.5575
EL CAJON	\$869.5025
EL DORADO	\$1,623.8375
EL PASO	\$390.4113
EL SEGUNDO	\$981.5793
ELGIN	\$715.7956
ELKHART	\$287.6751
ELKINS	\$226.431
ELTON	\$199.4337
EMERSON	\$36.6029
ENCINO	\$248.6974
ENFIELD	\$1,238.8749
ENGLAND	\$676.8745
ENGLEWOOD	\$1,383.1743
EUGENE	\$2,563.8861
EUREKA	\$1,155.4794
EUSTIS	\$822.2896
EVANSVILLE	\$217.5206
FAIRFAX	\$550.1808
FARGO	\$849.4144
FENTON	\$498.9325
FLINT	\$937.3397
FLORA	\$315.6726
FLORENCE	\$355.8647
FONDA	\$499.5603
FOREST PARK	\$502.5565
FORREST CITY	\$580.0003
FORT COLLINS	\$2,137.715
\$603,170.369	

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FileHomeInsertModelingViewOptimizeHelpFormatData / Drill

Aa

Aa

Aa

Aa

Themes

Page view

Mobile layout

Scale to fit

Mobile

☐ Gridlines

☐ Snap to grid

☐ Lock objects

Page options

Filters

Performance analyzer

Bookmarks

Sync slicers

Selection

Show panes

Share

Region

State

Atlantic

Delaware

Atlantic

Maryland

Atlantic

New Jersey

Atlantic

New York State

Atlantic

Pennsylvania

Atlantic

Puerto Rico

Midwest

Illinois

Midwest

Indiana

Midwest

Iowa

Midwest

Kansas

Midwest

Michigan

Midwest

Minnesota

Visualizations

Filters

Data

Search

>

Query1

>

Region

☒

Region

☐

Region #

>

State

☐

City

☐

Column4

☐

Column5

Page 1

+

Page 1 of 1

50%

2. Tutorial Week 4 – Visualising Data

- The table displays the total *Profit* for each city and the total *Profit* for the company.

City	Sum of Profit
AGAWAM	\$50,477.1526
EAU CLAIRE	\$2,240.1514
EDDINGTON	\$1,207.3952
EDENTON	\$396.8537
EDGARD	\$413.7355
EDISON	\$670.5575
EL CAJON	\$869.5025
EL DORADO	\$1,623.8375
EL PASO	\$390.4113
EL SEGUNDO	\$981.5793
ELGIN	\$715.7956
ELKHART	\$287.6751
ELKINS	\$226.431
ELTON	\$199.4337
EMERSON	\$36.6029
ENCINO	\$248.6974
ENFIELD	\$1,238.8749
ENGLAND	\$676.8745
ENGLEWOOD	\$1,383.1743
EUGENE	\$2,563.8861
EUREKA	\$1,155.4794
EUSTIS	\$822.2896
EVANSVILLE	\$217.5206
FAIRFAX	\$550.1808
FARGO	\$849.4144
FENTON	\$498.9325
FLINT	\$937.3397
FLORA	\$315.6726
FLORENCE	\$355.8647
FONDA	\$499.5603
FOREST PARK	\$502.5565
FORREST CITY	\$560.0003
FORT COLLINS	\$2,137.715
	\$603,170.369

2. Tutorial Week 4 – Adding Columns

- Select Transactions
- Select Store

Region, State, City, Store	Sum of Profit
, , NEW ORLEANS, World Center (WC10)	\$6,985.024
, , TEMPE, Alfredsons (Alf43)	\$4,273.674
, , NEW ORLEANS, Gerrit's Place (GP2)	\$3,959.472
, , AGAWAM, Yummy Foods (YF4)	\$2,755.421
, , AGAWAM, French Connect (FC1)	\$2,674.5256
, , SAN DIEGO, Simone Hall (SHALL7)	\$2,446.0627
, , MEMPHIS, Ahoy Place (AP 12)	\$2,180.2719
, , AGAWAM, Palmtree Zone (PZ16)	\$2,073.282
, , MOLINE, Planet Nine (PN5)	\$1,910.7188
, , AGAWAM, Obry Expo (OE4)	\$1,825.3384
JACKSONVILLE, Ahoy Place (AP 2)	\$1,806.741

39 AM

Farshid Keivanian

— □ ×

New

Optimize

Help

Format

Data / Drill

Share

data

erse

sources

Transform data

Refresh

New visual

Text box

More visuals

New measure

Quick measure

Sensitivity

Queries

Insert

Calculations

Sensitivity

City

Sum of Profit

Store

VICKSBURG

\$1,402.1208

Forage (F1)

YUMA

\$1,402.0188

Go Go Jo (GGJ6)

PALMETTO

\$1,380.7767

Killam Mart (KM8)

ROCKLAND

\$1,373.497

Vancity (VAN8)

MIDDLEBURY

\$1,363.5945

North Stop (NS11)

KLAMATH FALLS

\$1,363.1306

JCons (JC6)

LITTLETON

\$1,357.1768

Killam Mart (KM10)

MAYNARD

\$1,355.6842

Killam Mart (KM10)

NEW BEDFORD

\$1,331.0289

Creative Images LLC

YUMA

\$1,328.951

Steve's Stop (SSTOP)

YUMA

\$1,322.8915

Hollywood Store (HS)

LITTLE ROCK

\$1,312.5934

Creative Images LLC

Filters

Visualizations

Transactions

Search

☐ Price

☐ Product

☐ Product_ID

☒ Profit

☐ Quantity Sold

☐ Sales Revenue


☒ Store

☐ Version

2. Tutorial Week 4 – Sorting

Your report displays the Profit data for each Store sorted by City then by State and then by Region. You can quickly sort your data by either clicking the corresponding column by which you want sort the data by or using the Table context menu. To the City with the highest (maximum) Profit:

- Click on sorting symbol to see the lowest and highest profit.



Test Your Skills

- Which Store has the lowest profit?

FileHomeInsertModelingFormatData / DrillTable toolsColumn tools

StoreText

\$%Text

\$%Auto

StructureFormatting

Properties

Sort by column

Data groups

Manage relationships

New column

City	Sum of Profit	Store
NEW ORLEANS	\$6,985.024	World Center (WC10)
TEMPE	\$4,273.674	Alfredsons (Alf43)
NEW ORLEANS	\$3,959.472	Gerrit's Place (GP2)
AGAWAM	\$2,755.421	Yummy Foods (YF4)
AGAWAM	\$2,674.5256	French Connect (FC1)
SAN DIEGO	\$2,446.0627	Simone Hall (SHALL7)
MEMPHIS	\$2,180.2719	Ahoy Place (AP 12)
AGAWAM	\$2,073.282	Palmtree Zone (PZ16)
MOLINE	\$1,910.7188	Planet Nine (PN5)
AGAWAM	\$1,825.3384	Obry Expo (OE4)
JACKSONVILLE	\$1,806.741	Ahoy Place (AP 3)
YUMA	\$1,757.9125	Obrv Expo (OE14)

Visualizations

Build visual

Price

Product

Product_ID

☒ Profit

☐ Quantity So

☐ Sales Reven

☒ Store

2. Tutorial Week 4 – Filtering

At the moment the data for all Cities is displayed. There are a number of ways to restrict the values displayed in report through the use of Filters. Filters in a report limit the values displayed on reports, tables, and charts within a document. They do not modify the data that is retrieved from the data source. They simply hide the values not required on the report level. You have realised that the World Center Store in New Orleans is the most profitable. You want to know the Profit for the other World Center Stores throughout the country.

- Click on **Filters**

The screenshot shows the Microsoft Power BI ribbon with tabs: Home, Insert, Modeling, Format, Data / Drill, Table tools, and Column tools. The 'Data / Drill' tab is active, showing options like 'Get data', 'Excel workbook', 'OneLake data hub', 'SQL Server', 'Enter data', 'Dataverse', 'Recent sources', 'Transform data', 'Refresh', 'New visual', 'Text box', 'More visuals', 'New measure', and 'Quick measure'. Below the ribbon is a table with three columns: City, Sum of Profit, and Store. The table lists 15 rows of data. A tooltip is visible over the 'Filters' icon in the bottom right corner, stating: 'Collapse or expand the filter pane while editing. This also determines how report readers see it'.




City	Sum of Profit	Store
NEW ORLEANS	\$6,985.024	World Center (WC10)
TEMPE	\$4,273.674	Alfredsons (Alf43)
NEW ORLEANS	\$3,959.472	Gerrit's Place (GP2)
AGAWAM	\$2,755.421	Yummy Foods (YF4)
AGAWAM	\$2,674.5256	French Connect (FC1)
SAN DIEGO	\$2,446.0627	Simone Hall (SHALL7)
MEMPHIS	\$2,180.2719	Ahoy Place (AP 12)
AGAWAM	\$2,073.282	Palmtree Zone (PZ16)
MOLINE	\$1,910.7188	Planet Nine (PN5)
AGAWAM	\$1,825.3384	Obry Expo (OE4)
JACKSONVILLE	\$1,806.741	Ahoy Place (AP 3)
YUMA	\$1,757.9125	Obrv Expo (OE14)


2. Tutorial Week 4 – Filtering


- Scroll Down to find **Store**
- Select **Advanced filtering**
- Type **World Center**
- Click on **Apply Filter**
- The Table now only displays data for the World Center stores and has calculated a total profit for

these stores.

City	Sum of Profit	Store
AGAWAM	\$1,614.9771	World Center (WC12)
EAU CLAIRE	\$390.0378	World Center (WC12)
EDDINGTON	\$403.9623	World Center (WC2)
GARDNER	\$15.9751	World Center (WC3)
GARDNER	\$14.3749	World Center (WC4)
HUTCHINSON	\$371.1276	World Center (WC2)
ITASCA	\$12.8573	World Center (WC1)
LITTLE ROCK	\$356.4837	World Center (WC8)
MABELVALE	\$168.8945	World Center (WC8)
MARRERO	\$170.7242	World Center (WC10)
METAIRIE	\$170.175	World Center (WC10)
MISSION VIEJO	\$0.9839	World Center (WC9)


 **Filters**  

 Search

contains 

World Center

☒ And ☐ Or



Apply filter

2. Tutorial Week 4 – Saving

- Save your report ‘Tutor Week 4.pbix’ as you need to use it in the next tutorials.



**Thank you,
Happy a Learning Day**