

# Module 9: Advanced Analytics in Power BI

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Assignment (Solution)

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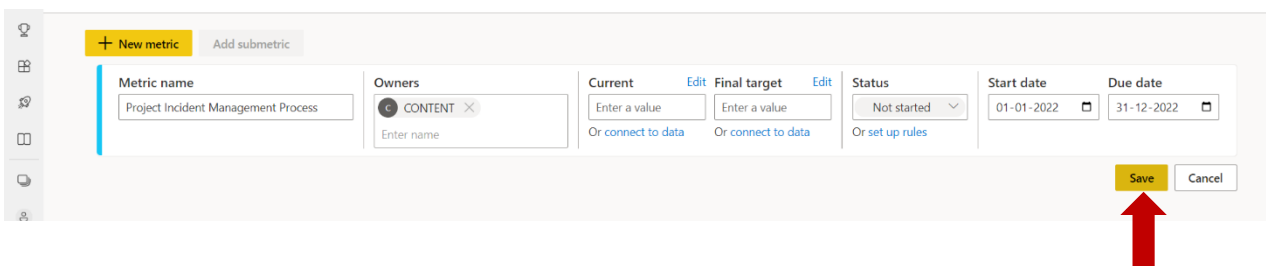
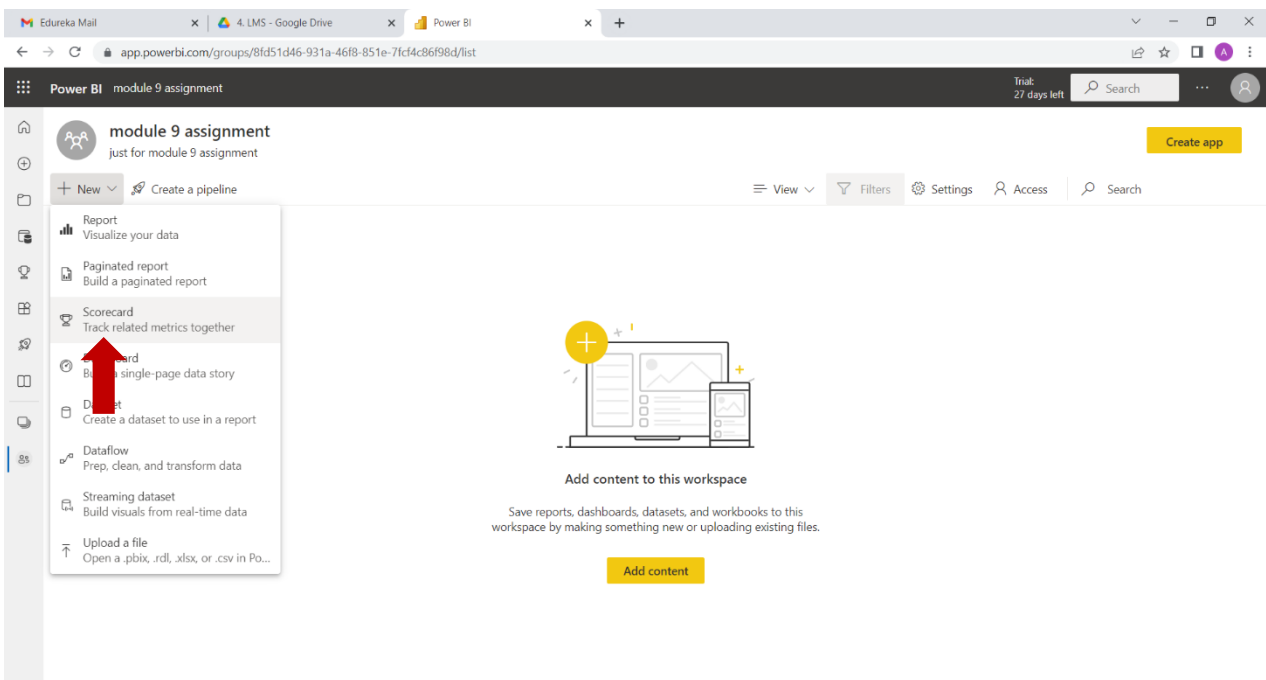
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## Assignment Solution

**Task 1:** Create a goal called **Project Incident Management Process** and then create the following sub-goal (scorecards)

- i. Incidents waiting for approval
- ii. Critical Backlog incident
- iii. % PM Compliance
- iv. % Schedule Compliance

**Step 1:** Go to a **workspace** on power BI service → Create a new **Scorecard** → New metric → And name it **Project Incident Management Process** → Save.



## Incidents waiting for approval

**Step 2:** Click on the check box of metric → Add sub-metric → Named it as **Incidents waiting for approval** → Save.

**Note:** repeat this process for all asked sub-metrics in the first task.

The screenshot shows the Power BI interface for the 'Project Incident Management Process' metric. The 'Add submetric' button is highlighted with a red arrow. Below the metric, a list of sub-metrics is displayed:

Name	Owners	Status	Value	Progress	Due date
Project Incident Management Process	CONTENT	Not started			Dec 31, 2022
Incidents waiting for approval	CONTENT	Not started			Sep 25, 2022
Critical Backlog incident	CONTENT	Not started			Sep 25, 2022
% PM Compliance	CONTENT	Not started			Sep 25, 2022

Below the list, the 'Submetric name' field is set to '% Schedule Compliance'. The 'Current' value is 8, and the 'Final target' is 12. The 'Status' is 'Not started'. The 'Start date' is 25-08-2022, and the 'Due date' is 25-09-2022. The 'Save' button is highlighted with a red arrow.

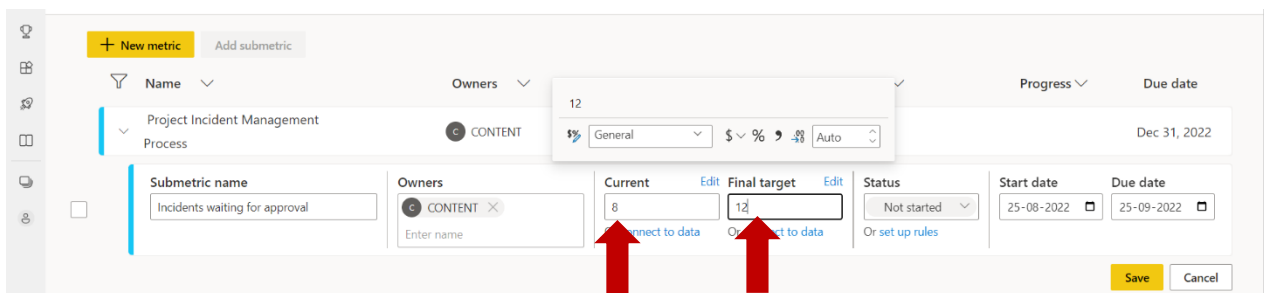
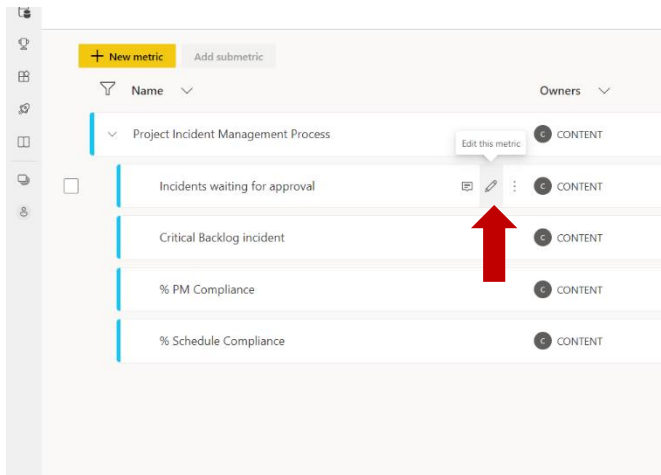
## Task 2: Edit the First sub-goal **Incidents waiting for approval**

**Provide the current value as 8 and give the Target value of 12.**

**Step 1:** Go to First sub-goal **Incidents waiting for approval** → Edit (Pen icon) → Fill below detail.

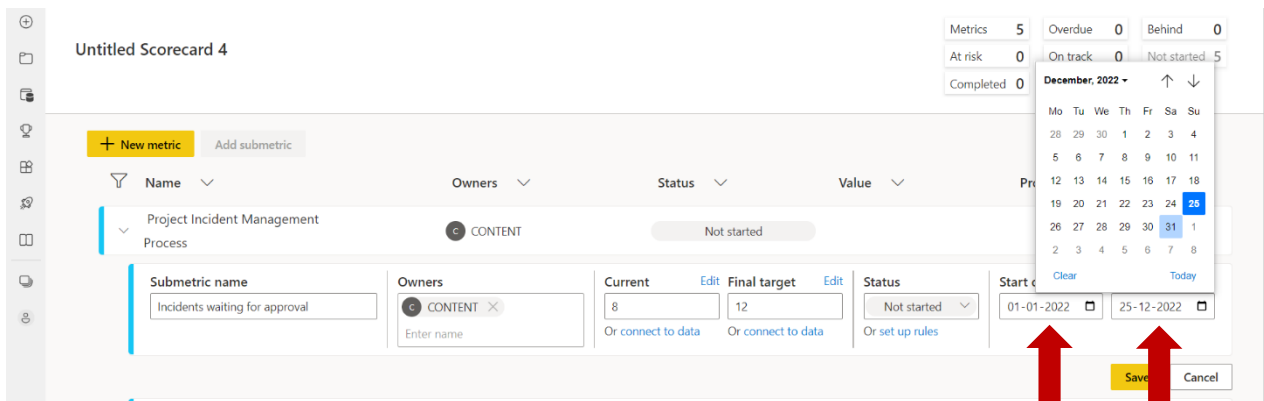
Current: 8

Final target: 12



Select start and end dates as the start of the year and end of the year, respectively

**Step:** Set **01-01-2022** as starting date and **25-12-2022** as the end date



### Set up rules for status

- On track - If the value is less than or equal to 12
- At Risk - If the value is greater than 12
- Otherwise, on track

**Step:** Select **set up rules** under Status → **Status Rule** → **New Rules** → Create rules as per condition

This screenshot shows the 'New Rules' configuration page in Power BI. The submetric 'Incidents waiting for approval' is selected. The 'Status' dropdown is set to 'Not started'. A red arrow points to the 'Or set up rules' link below the status dropdown. The 'Current' value is 8 and the 'Final target' is 12. The 'Due date' is set to Dec 31, 2022. Other submetrics listed include 'Critical Backlog incident' and '% PM Compliance'.

This screenshot shows the 'Status rules' configuration page for the submetric 'Incidents waiting for approval'. The 'Status rules' tab is selected. A red arrow points to the '+ New rule' button. The page displays 'No rules defined' and prompts the user to 'Create new rules to automatically update the status'. The 'Save' and 'Cancel' buttons are at the bottom right.

Create rule 1: set **Is less than or equal to** as condition and set value as **12** and change status to **on track**

Create rule 2: set **Is greater than** and set value as **12** and change status to **at risk**.

Also, change **Otherwise, change status** to **on track** and **save**.

**Go to the details tab and enter the following values for each month's check-in.**

1. For 1<sup>st</sup> April, set the value as 15
2. For 1<sup>st</sup> May, set the value as 2
3. For 1<sup>st</sup> June, set the value as 5
4. For 1<sup>st</sup> July, set the value as 10

**Step:** Go to Detail → **New check-in** → Select date (1<sup>st</sup> day by default) → Enter the value as given with month → save (repeat this process for every month) → Close and Save your score card.

**Task 3: Edit the second subgoal Critical Backlog incident**

**Provide the current value as 60 and give Target values of 100**

**Steps: Edit the second sub-goal Critical Backlog incident → set current and final target values as 60 and 100**

**Select start and end dates as the start of year and end of the year, respectively**

**Steps: Set Start and Due dates as 01-01-2022 and 31-12-2022**

**Set up rules for status**

1. **On track** - If the value is less than or equal to 80
2. **At Risk** - If the value is between 80 and 100
3. **Overdue**- If the value is greater than 100

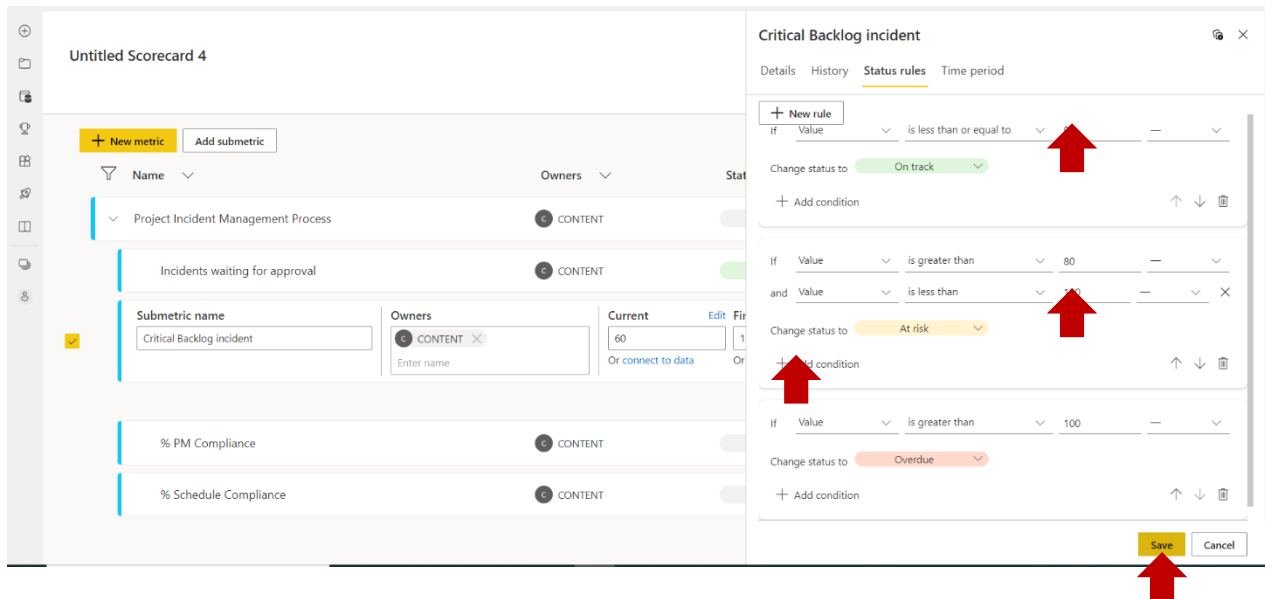
**Steps: Select set up rules under Status → Status Rule → New Rules → Create rules as per the condition.**

Create rule 1: set **Is less than or equal to** as condition and set value as **80** and change status to **on track**

Create rule 2: set **Is greater than** and set value as **80** and add a new condition by clicking on **Add condition** and set as **less than** then give value as 100. change status to **at risk**.

Create rule 2: set **Is greater than** and set value as 100 and change status to **Overdue**.

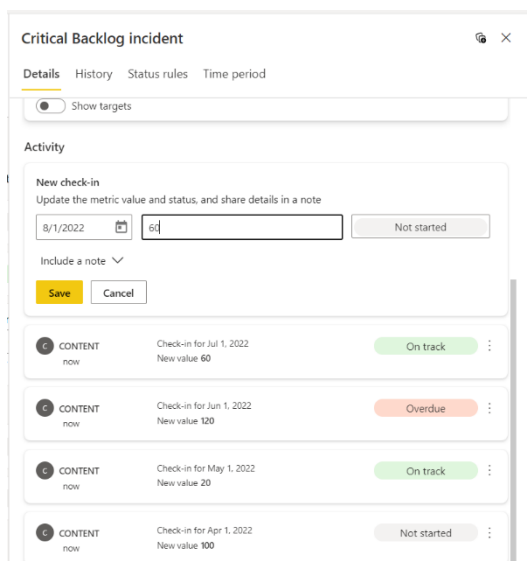
And save it in the end.



Go to the details tab and enter the following values for each month's check-in.

1. For 1<sup>st</sup> April, set the value as 100
2. For 1<sup>st</sup> May, set the value as 20
3. For 1<sup>st</sup> June, set the value as 120
4. For 1<sup>st</sup> July, set the value as 60
5. For 1<sup>st</sup> August, set the value as 60

**Step:** Go to Detail → **New check-in** → Select date (1<sup>st</sup> day by default) → Enter the value as given with month → save (repeat this process for every month) → Close and Save your score card.





#### Task 4: Edit the third subgoal % PM Compliance

**Provide Target values of 500.**

**Steps:** Edit the second sub-goal **Schedule Compliance** → set **final target** values as **500**

The screenshot shows a subgoal configuration interface for 'Critical Backlog incident'. The 'Submetric name' is '% PM Compliance'. The 'Owners' section shows 'CONTENT'. The 'Current' value is 'Enter a value' and the 'Final target' is '500'. A red arrow points to the 'Edit' button next to the 'Final target' field. The 'Status' is 'Not started'. The 'Start date' is '25-08-2022' and the 'Due date' is '25-09-2022'. There are 'Save' and 'Cancel' buttons at the bottom right.

**Select start and end dates as the start of the year and end of the year, respectively**

**Steps:** Set **Start** and **Due** dates as **01-01-2022** and **31-12-2022**

The screenshot shows the same subgoal configuration interface. The 'Start date' is now '01-01-2022' and the 'Due date' is '31-12-2022'. Red arrows point to these date fields. The 'Status' is 'Not started'. There are 'Save' and 'Cancel' buttons at the bottom right.

#### Set up rules for status

1. On track - If the value is greater than 10 % of the target
2. At Risk -otherwise

**Steps:** Select **set up rules** under Status → **Status Rule** → **New Rules** → Create rules as per the condition.

Create rule 1: set **Is less than or equal to** as condition and set value as **ten** and select **% of target** for value then change status to **on track**

And **otherwise**, change status to **At risk**. Save it in the end.

**% PM Compliance**

Details History **Status rules** Time period

+ New rule

If Value is greater than or equal to 10 % of target

Change status to On track

+ Add condition

Otherwise, change status to At risk

Save Cancel

**Go to the details tab and enter the following values for each month's check-in**

1. For 1<sup>st</sup> April, set the value as 40
2. For 1<sup>st</sup> May, set the value as 20
3. For 1<sup>st</sup> June, set the value as 20
4. For 1<sup>st</sup> July, set the value as 40
5. For 1<sup>st</sup> August, set the value as 400

**Step:** Go to Detail → **New check-in** → Select date (1<sup>st</sup> day by default) → Enter the value as given with month → save (repeat this process for every month) → Close and Save your score card.

Details History Status rules Time period

Show targets

**Activity**

**New check-in**  
Update the metric value and status, and share details in a note

8/1/2022 400 Not started

Include a note

Save Cancel

CONTENT now	Check-in for Jul 1, 2022 New value 40	At risk
CONTENT now	Check-in for Jun 1, 2022 New value 20	At risk
CONTENT now	Check-in for May 1, 2022 New value 20	At risk
CONTENT now	Check-in for Apr 1, 2022 New value 40	At risk

## Task 5: Edit the third subgoal % Schedule Compliance

**Provide Target values of 500.**

**Steps:** Edit the second sub-goal **Schedule Compliance** → set **final target** values as **500**

The screenshot shows the configuration for the submetric '% PM Compliance'. The 'Final target' field is set to 500. The 'Current' value is 196. The status is 'Not started'. The start date is 25-08-2022 and the due date is 25-09-2022. A red arrow points to the 'Final target' field.

**Select start and end dates as the start of the year and end of the year, respectively**

**Steps:** Set **Start** and **Due** dates as **01-01-2022** and **31-12-2022**

The screenshot shows the configuration for the submetric '% Schedule Compliance'. The 'Start date' is set to 01-01-2022 and the 'Due date' is set to 31-12-2022. The 'Final target' is 500. A red arrow points to the 'Start date' field and another red arrow points to the 'Due date' field.

## Set up a rule for status

1. On track - If the value is greater than 80 % of the target
2. At Risk - otherwise

**Steps:** Select **set up rules** under Status → **Status Rule** → **New Rules** → Create rules as per the condition.

Create rule 1: set **Is less than or equal to** as condition and set value as **80** and select **% of target** for value then change status to **on track**

And **otherwise**, change status to **At risk**. Save it in the end.

**% Schedule Compliance**

Details History **Status rules** Time period

+ New rule

if Value is greater than 80 % of target

Change status to On track

+ Add condition

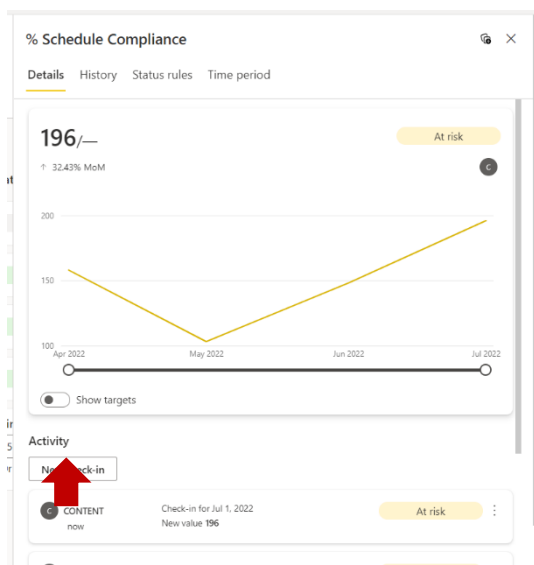
Otherwise, change status to At risk

Save Cancel

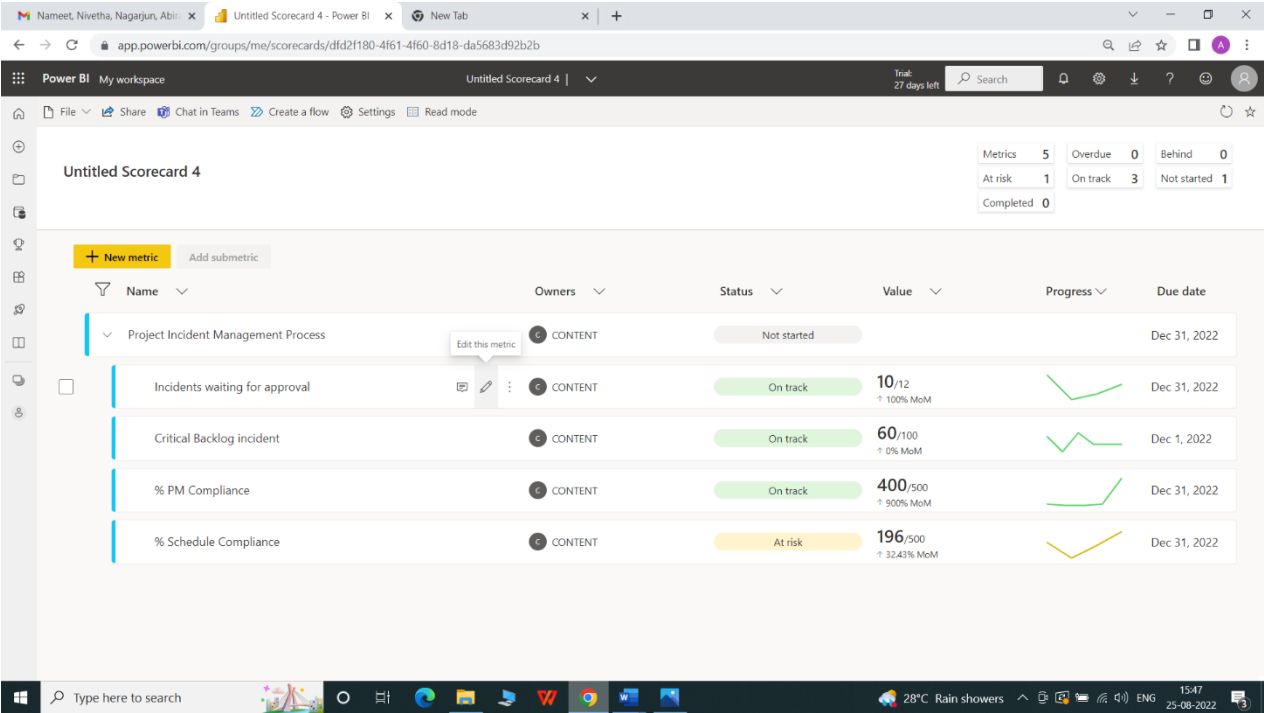
**Go to the details tab and enter the following values for each month's check-in**

1. For 1<sup>st</sup> April, set the value as 158
2. For 1<sup>st</sup> May, set the value as 103
3. For 1<sup>st</sup> June, set the value as 148
4. For 1<sup>st</sup> July, set the value as 196
5. For 1<sup>st</sup> August, set the value as 196

**Step:** Go to Detail → **New check-in** → Select date (1<sup>st</sup> day by default) → Enter the value as given with month → save (repeat this process for every month) → Close and Save your score card.



Final view



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