

Data Processing Description

Dataset 1: VanArsdel Actuals.xlsx

1. Processing by Excel

- Create new datasheets
- Split Date column by using **Text to Column**
- Use following function:
 - + **VLOOKUP** to create the category, segment, unit cost & unit price columns on sheet Sales

2. Processing by Power BI

- Import Data into PBI
- Transform data types by Power Queries
- Add columns by customizing columns by Power Queries
- Add new index by creating measures and quick measures
- Create hierarchy data by date, month, quarter and year
- Use following basic DAX:
 - + **AVERAGE**
 - + **SUM**
 - + **DIVIDE**
 - + **COUNT**
 - + **COUNTROWS**
 - + **VALUES**
 - + **CALCULATE**

3. Visualizing by Power BI

- Create Maps, Cards, Tables, Slicers and Charts by dragging and dropping the data in Tab Fields

Dataset 2: VanArsdel Budget.csv

1. Processing by Excel

- Split data into fields: Month, Forecast 2016, Budget 2015, Budget 2016, Budget allocation by month
- Calculate Cumulative sales, Cumulative budget and Cumulative forecast for 2016

2. Processing by Power BI

- Calculate Total sales by month

3. Visualizing by Power BI

- Create Charts by dragging and dropping the data in Tab Fields