PROJECT #1
ASSIGNMENT
ACCT402-602
SPRING 2024

Use the BEANS.pbix file for this assignment.

Submit on Canvas by March 18, 2024 @ 1 pm.

Mention all group members.

#1

How many certified employees does Beans have?

NUMBER OF CERTIFIED EMPLOYEES	13

A certified employee is an employee who has at least one certification. An employee can have more than one certification.

Assignment: Use a **DAX formula** to determine the number of certified employees.

ASSIGNMENT	ITEM	GRADE	SCORE
ASS#1	DID NOT USE A DAX FORMULA	-2	
	INCORRECT ANSWER (NUMBER)	-2	
	INCORRECT FORMATTING OF THE REPORT (-0.5 / MISTAKE). Missing Text box. Text box does not have a pink background. Card does not have a yellow background.	-1.5	
	TOTAL	2	

#2

Beans divides its employees into two groups: **staff** and **management**.
All staff and seniors (job titles) belong to the "staff" group.
All managers, sr. managers, and partners (job titles) belong to the "management" group.
Use this categorization to create the following dashboard:

LIST OF STAFF AND MANAGEMENT LEVEL EMPLOYEES

STAFF	MANAGEMENT
Ann, Petroni	Alex, Messi
Diego, Asare	Dieumerci, Mbokani
Elena, Ogwumike	Ed, Diamond
Gail, David	Ivan, Lenk
John, Federer	Kim, Bush
Juan, Lozano	Kim, Peters
Kayne, James	Molly, McCarthy
Keme, Potoms	Paulo, Lukaku
Lichin, Yan	Shiela, Diamond
Marcus, Clay	Thibaut, Mertens
Meryl, Swift	
Mick, Richards	
Sarah, Lee	
Yvonne, Sutherland	

Assignment: Use a **DAX formula** to categorize employees as "STAFF" and "MANAGEMENT". Then, use the **Filters Pane** to create the report above.

ASSIGNMENT	ITEM	GRADE	SCORE
ASS#2	DID NOT USE A DAX FORMULA	-2	
	DID NOT USE FILTERS PANE	-2	
	INCORRECT LIST OF STAFF OR MANAGEMENT EMPLOYEES	-2	
	INCORRECT FORMATTING OF THE REPORT Text in column headers is white while background is black.	-0.5	
	TOTAL	2	

#3

Beans divides its clients into three categories based on total revenue. Clients that have generated less than $5,000 are "C" clients. Clients that have generated at least $5,000 but less than $20,000 are considered "B" clients. Clients that have generated at least $20,000 are considered "A" clients. Use Beans' categories to create the following chart:

ASSIGNMENT	ITEM	GRADE	SCORE
ASS#3	INCORRECT NUMBERS	-2	
	INCORRECT FORMATTING OF THE REPORT (-0.5/ MISTAKE) Incorrect chart. Incorrect titles for Y-axis or X-axis. Missing data labels. Incorrect positioning of data labels.	-0.5	
	TOTAL	2	

#4

How much revenue has been generated by "Restaurants" clients? Break it down by "job title" and by "client category".

TOTAL REVENUE FROM "RESTAURANTS" CLIENTS	$369,891.57

JOB TITLE	REVENUE FROM RESTAURANTS
Manager	$113,466.6
Partner	$89,141.75
Senior	$78,294.8
Sr. Manager	$48,263.3
Staff	$40,725.12

CLIENT CATEGORY	REVENUE FROM RESTAURANTS
A	$104,401.32
B	$237,585.8
C	$27,904.45

Assignment: Use a **DAX formula(s)** to determine the total revenue from restaurant clients.

ASSIGNMENT	ITEM	GRADE	SCORE
ASS#4	DID NOT USE DAX FORMULA(S)	-2	
	ANY INCORRECT NUMBERS	-2	
	TEXTBOX MISSING	-0.5	
	CARD MISSING	-1	
	JOB TITLE TABLE MISSING	-1	
	CLIENT CATEGORY TABLE MISSING	-1	
	TOTAL	2	

#5

How important are "restaurant" and "retail" customers for Beans? Stated differently, what percentage of their clients is from those two industries? Further, analyze how this % differs across the three client categories.

% OF CLIENTS FROM "RESTAURANT" OR "RETAIL" INDUSTRY

38.14%

CLIENT CATEGORY	% RESTAURANT AND RETAIL CLIENTS
A	27.59%
B	39.39%
C	40.40%

Assignment: Use **DAX formulas** to determine the percentage.

ASSIGNMENT	ITEM	GRADE	SCORE
ASS#5	DID NOT USE DAX FORMULA(S)	-2	
	ANY INCORRECT NUMBERS	-2	
	TOTAL	2	

#6

Determine how many staff employees there are for each manager—this is a ratio that divides the number of staff employees by the number of managers.

NUMBER OF STAFF EMPLOYEES PER MANAGER

1.40

Assignment: Use **DAX formulas** to determine this ratio.

ASSIGNMENT	ITEM	GRADE	SCORE
ASS#6	DID NOT USE DAX FORMULA(S)	-2	
	INCORRECT RATIO (NUMBER)	-2	
	TOTAL	2	

#7

How much revenue did management-level employees who graduated from Michigan State University or the University of Michigan generate?

<div style="background-color:pink; padding:10px;">

REVENUE GENERATED BY MANAGEMENT-LEVEL EMPLOYEES WHO GRADUATED FROM MICHIGAN STATE UNIVERSITY OR THE UNIVERSITY OF MICHIGAN.

</div>

$903,003.55

CLIENT CATEGORY	REVENUE GENERATED BY MSU AND UM MANAGEMENT-LEVEL EMPLOYEES
A	$443,119.55
B	$343,474.20
C	$116,409.80

Further analyze how much revenue those employees generated across client categories (A, B, and C).

Assignment: Use **DAX formulas** to determine the revenue numbers shown in this dashboard.

ASSIGNMENT	ITEM	GRADE	SCORE
ASS#7	DID NOT USE DAX FORMULA(S)	-2	
	ANY INCORRECT NUMBERS	-2	
	TOTAL	2	

#8

For how many services has Beans exceeded the budgeted amount (the $ amount for the service is higher than the budgeted $ amount)? Further, for all employees:

1.   Determine for how many services they have exceeded the budgeted amount.
2.   Determine for what percentage of their services they have exceeded the budgeted amount.

Number of Services That Exceed Their Budgeted Amount
1642

EMPLOYEE NAME	NUMBER OF SERVICES EXCEEDING BUDGETED AMOUNT	% OF SERVICES EXCEEDING BUDGETED AMOUNT
Ed, Diamond	401	0.36
Ivan, Lenk	325	0.30
Keme, Potoms	188	0.33
Juan, Lozano	144	0.84
Alex, Messi	120	0.32
Elena, Ogwumike	100	0.36
Paulo, Lukaku	85	0.28
Thibaut, Mertens	59	0.40
Molly, McCarthy	49	0.44
Gail, David	33	0.38
Shiela, Diamond	31	0.24
Sarah, Lee	27	0.36
Marcus, Clay	18	0.32
Dieumerci, Mbokani	12	0.50
Kayne, James	12	0.52
Kim, Bush	10	0.20
Diego, Asare	8	0.57
Meryl, Swift	6	0.25
Yvonne, Sutherland	6	0.38
Lichin, Yan	4	0.50
Kim, Peters	2	1.00
Ann, Petroni	1	0.25
Mick, Richards	1	0.14

Assignment: Use **DAX formulas** to determine the number of services and the percentage shown in the dashboard above.

ASSIGNMENT	ITEM	GRADE	SCORE
ASS#8	DID NOT USE DAX FORMULA(S)	-2	
	ANY INCORRECT NUMBERS	-2	
	TOTAL	2	

#9

For each job title, determine the ratio:

number of certified employees/number of non-certified employees.

If all employees are certified, then the value of the ratio is "All Certified".

If none of the employees (for a specific job title) are certified, then the value of the ratio is "None Certified".
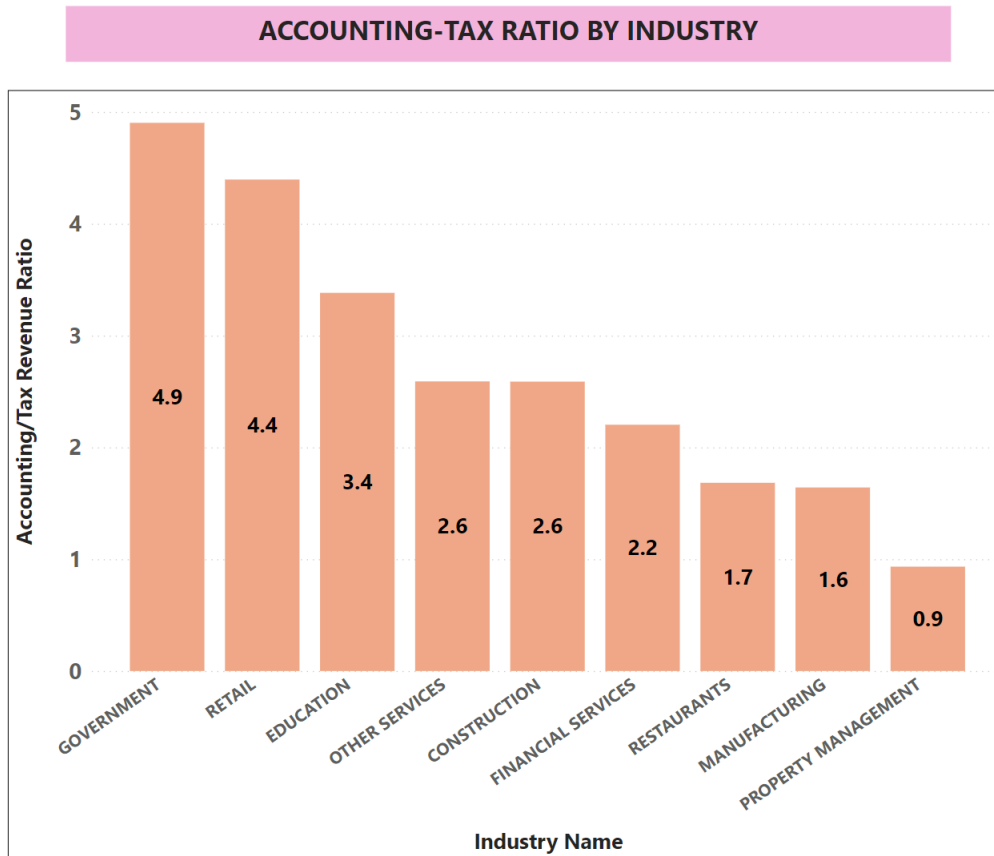
CERTIFIED/NON-CERTIFIED RATIO EMPLOYEES

JobTitle	CERTIFIED / NON-CERTIFIED RATIO
Manager	All Certified
Partner	All Certified
Senior	1.67
Sr. Manager	All Certified
Staff	None Certified

ASSIGNMENT	ITEM	GRADE	SCORE
ASS#8	ANY INCORRECT NUMBERS/VALUES	-2	
	TOTAL	2	

#10

Beans has two service lines: Accounting and Tax. Compare (as a ratio) how much revenue has been generated by the Accounting service line versus the Tax service line. Then compare this ratio across industries.

ACCOUNTING-TAX RATIO BY INDUSTRY

ASSIGNMENT	ITEM	GRADE	SCORE
ASS#10	ANY INCORRECT NUMBERS	-2	
	INCORRECT CHART	-1	
	NO DATA LABELS	-1	
	TOTAL	2	