To create meaningful and necessary visuals in Power BI based on your files and columns, I’ll guide you through the process step by step, explaining which columns to use for each visual and why they are important. We’ll create multiple pages for different categories of analysis (Finance, HR, Operations, etc.) and use the appropriate columns to build each visual.

### \*\*Page 1: Finance Overview\*\*

This page will focus on financial metrics such as invoicing, receivables, and account balances.

#### \*\*Visual 1: Invoices by Currency\*\*

- \*\*Type\*\*: Pie Chart

- \*\*Columns\*\*:

- \*\*Invoice Number\*\* (File 1: "Invoice extract 29 july") for counting invoices.

- \*\*Currency\*\* (File 1) for grouping.

\*\*Why\*\*: This will show the breakdown of invoices by currency, which is helpful for understanding international invoicing.

#### \*\*Visual 2: Outstanding Receivables by Aging Bucket\*\*

- \*\*Type\*\*: Stacked Bar Chart

- \*\*Columns\*\*:

- \*\*Customer Balance\*\* (File 5/6: "Accounts Receivable\_age credit balance report") as values.

- \*\*Aging Buckets\*\* (File 5/6: Jan-30, 31-60, 60-90, 90+) for categories.

\*\*Why\*\*: This visual will display the total outstanding balances categorized by the aging bucket, giving insights into overdue receivables.

#### \*\*Visual 3: Invoice Amount by Supplier Site\*\*

- \*\*Type\*\*: Clustered Bar Chart

- \*\*Columns\*\*:

- \*\*Supplier Site\*\* (File 1: "Invoice extract 29 july") for categories.

- \*\*Amount\*\* (File 1) for values.

\*\*Why\*\*: This helps in identifying which supplier sites have the highest invoiced amounts, potentially highlighting key suppliers.

#### \*\*Visual 4: Receivables Trend Over Time\*\*

- \*\*Type\*\*: Line Chart

- \*\*Columns\*\*:

- \*\*Due Date\*\* (File 5/6) as the X-axis (ensure it’s formatted as a date).

- \*\*Customer Balance\*\* (File 5/6) as the Y-axis.

\*\*Why\*\*: This visual shows how the receivables are evolving over time, which is key for monitoring cash flow.

### \*\*Page 2: HR Help Desk Analysis\*\*

This page will focus on HR metrics, such as help desk performance and resolution times.

#### \*\*Visual 1: Help Desk Requests by Department\*\*

- \*\*Type\*\*: Bar Chart

- \*\*Columns\*\*:

- \*\*Department Name\*\* (File 3: "HR help Desk summary report") for categories.

- \*\*# of Requests\*\* (File 3) for values.

\*\*Why\*\*: This shows which departments are raising the most help desk requests, which can highlight areas needing support.

#### \*\*Visual 2: Average Time to Resolve by Queue Name\*\*

- \*\*Type\*\*: Column Chart

- \*\*Columns\*\*:

- \*\*Queue Name\*\* (File 3) for categories.

- \*\*Average Time to Resolve (Days)\*\* (File 3) for values.

\*\*Why\*\*: This visual identifies which help desk queues are taking longer to resolve, allowing for resource allocation adjustments.

#### \*\*Visual 3: Help Desk Status Distribution\*\*

- \*\*Type\*\*: Donut Chart

- \*\*Columns\*\*:

- \*\*Status\*\* (File 3) for categories.

- \*\*# of Requests\*\* (File 3) for values.

\*\*Why\*\*: It provides a quick glance at the status of help desk requests (e.g., Open, Closed), highlighting bottlenecks.

#### \*\*Visual 4: Time to Resolve vs. Job Role\*\*

- \*\*Type\*\*: Scatter Plot

- \*\*Columns\*\*:

- \*\*Job Name\*\* (File 3) for X-axis.

- \*\*Average Time to Resolve (Days)\*\* (File 3) for Y-axis.

\*\*Why\*\*: This visual helps identify if certain job roles have longer resolution times, which may point to training needs or process improvements.

### \*\*Page 3: Accounts Receivable Aging\*\*

This page will detail aging buckets and related metrics for receivables.

#### \*\*Visual 1: Receivables Aging Distribution\*\*

- \*\*Type\*\*: Stacked Bar Chart

- \*\*Columns\*\*:

- \*\*Aging Bucket\*\* (File 9, Sheet1) for categories.

- \*\*Amount Remaining\*\* (File 9, Sheet1) for values.

\*\*Why\*\*: This shows how much is left to be collected for each aging bucket, which is important for understanding payment delays.

#### \*\*Visual 2: Total Receivables by Customer\*\*

- \*\*Type\*\*: Tree Map

- \*\*Columns\*\*:

- \*\*Customer Name\*\* (File 9, Sheet1) for categories.

- \*\*Amount Remaining\*\* (File 9, Sheet1) for values.

\*\*Why\*\*: This highlights which customers have the highest unpaid amounts, helping prioritize collection efforts.

#### \*\*Visual 3: Aging Bucket Trends\*\*

- \*\*Type\*\*: Line Chart

- \*\*Columns\*\*:

- \*\*Aging Bucket\*\* (File 9, Sheet1) for categories.

- \*\*Original Balance\*\* (File 9, Sheet1) for values.

- \*\*Due Date\*\* (File 9, Sheet1) for the X-axis (formatted as a date).

\*\*Why\*\*: This visual shows the movement of balances across different aging buckets over time, highlighting how quickly receivables are aging.

### \*\*Page 4: Expense Analysis\*\*

This page will focus on expense reports and reimbursement data.

#### \*\*Visual 1: Reimbursable Amounts by Expense Type\*\*

- \*\*Type\*\*: Bar Chart

- \*\*Columns\*\*:

- \*\*Expense Type\*\* (File 4: "SC all expense detailed report") for categories.

- \*\*Reimbursable Amount\*\* (File 4) for values.

\*\*Why\*\*: This helps identify which expense types account for the highest reimbursable amounts, which is important for budgeting.

#### \*\*Visual 2: Expense Reports Over Time\*\*

- \*\*Type\*\*: Line Chart

- \*\*Columns\*\*:

- \*\*Expense Report Date\*\* (File 4) for X-axis (formatted as date).

- \*\*Reimbursable Amount\*\* (File 4) for Y-axis.

\*\*Why\*\*: This shows trends in submitted expenses, helping forecast future spending.

#### \*\*Visual 3: Final Approval Status\*\*

- \*\*Type\*\*: Donut Chart

- \*\*Columns\*\*:

- \*\*Report Status\*\* (File 4) for categories.

- \*\*Count of Report Number\*\* (File 4) for values.

\*\*Why\*\*: This highlights the status of expense reports (e.g., Approved, Pending), giving an overview of processing efficiency.

### \*\*Page 5: Operational Email Handling\*\*

This page will focus on operational metrics for mailbox email handling.

#### \*\*Visual 1: Emails Processed by Month\*\*

- \*\*Type\*\*: Line Chart

- \*\*Columns\*\*:

- \*\*Date\*\* (File 7: Mail box) for X-axis.

- \*\*BAU Churn: Emails Up to\*\* (File 7) for Y-axis.

\*\*Why\*\*: This tracks the number of emails processed over time, showing how workloads vary across months.

#### \*\*Visual 2: Backlog by Mailbox\*\*

- \*\*Type\*\*: Stacked Column Chart

- \*\*Columns\*\*:

- \*\*Mailbox\*\* (e.g., Accounts Payable, Creditors Mailbox from File 7) for categories.

- \*\*Backlog: Earliest Unread\*\* (File 7) for values.

\*\*Why\*\*: This helps identify which mailboxes have the largest backlogs, indicating where more resources might be needed.

### \*\*Implementation Steps in Power BI:\*\*

1. \*\*Import Data\*\*:

- Open Power BI and import your files.

- Ensure columns are correctly formatted (e.g., date columns as Date, amounts as Currency).

2. \*\*Model Relationships\*\*:

- Establish relationships between the files (e.g., Customer Name across files, Invoice Number in finance tables).

3. \*\*Create Visuals\*\*:

- Go to \*\*Visualizations\*\* pane, drag and drop the necessary fields into the chart types (e.g., Bar, Line, Pie).

- Use \*\*Slicers\*\* for interactivity (e.g., filter by Date, Department, or Customer Name).

4. \*\*Add Filters\*\*:

- Use the \*\*Filters\*\* pane to narrow down the data (e.g., filtering for specific months or categories).

5. \*\*Organize into Pages\*\*:

- Create separate pages for each analysis type (Finance, HR, Accounts Receivable, etc.) using \*\*+ New Page\*\* in Power BI.

6. \*\*Enhance Visuals\*\*:

- Add \*\*Data Labels\*\*, \*\*Titles\*\*, and \*\*Tooltips\*\* to improve clarity.

- Use \*\*Conditional Formatting\*\* for critical metrics (e.g., highlighting overdue invoices).

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This approach will give you a structured and interactive dashboard in Power BI, presenting insights that are necessary for the council's project. Let me know if you need specific guidance on any step!