TASK LIST 1- Part 1

1. Import the Business Data File into Microsoft Power BI:

- Open Power BI Desktop.

- Click on "Get Data" from the Home tab.

- Choose "Excel" as the data source type.

- Navigate to and select your Business data file.

- Click "Import" after selecting the file.

2. Load Only the "Account" Sheet from the Workbook After Transforming the Data:

- In the Navigator window, select the "Account" sheet.

- Click on "Transform Data" to open Power Query Editor.

- Perform any necessary transformations (cleaning, filtering, renaming columns, etc.).

- Close and apply the changes to load only the transformed "Account" data.

3. Represent the Data as per the Given Criteria:

a. Total Count of Account Numbers Against Country (Tabular Format)

- Go to the "Report" view in Power BI Desktop.

- Drag the "Country" field and the "Account Number" field into a table visual.

- Power BI automatically counts the occurrences of each account number per country.

b. Country-wise Account Holder's Names (Table)

- Add another table visual.

- Drag the "Country" and "Account Holder Name" fields into this new table visual.

c. Insert a Slicer for Country-wise Filter

- Go to the "Visualizations" pane.

- Drag the "Country" field into the "Slicer" visualization.

- Resize and position the slicer on your report canvas as desired.

d. Data Representation for Specific Countries (India, Brazil, Greece, France)

- Filter the visuals using the slicer to select India, Brazil, Greece, and France.

- Adjust visuals or create new ones to specifically show data for these countries.
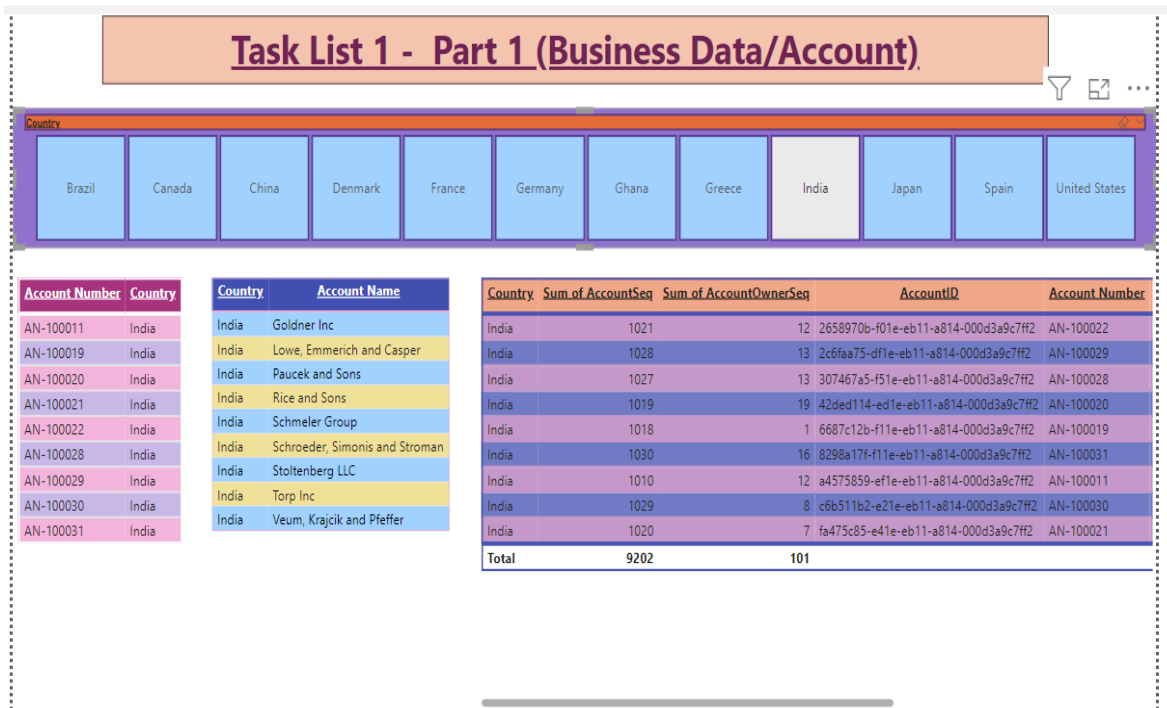

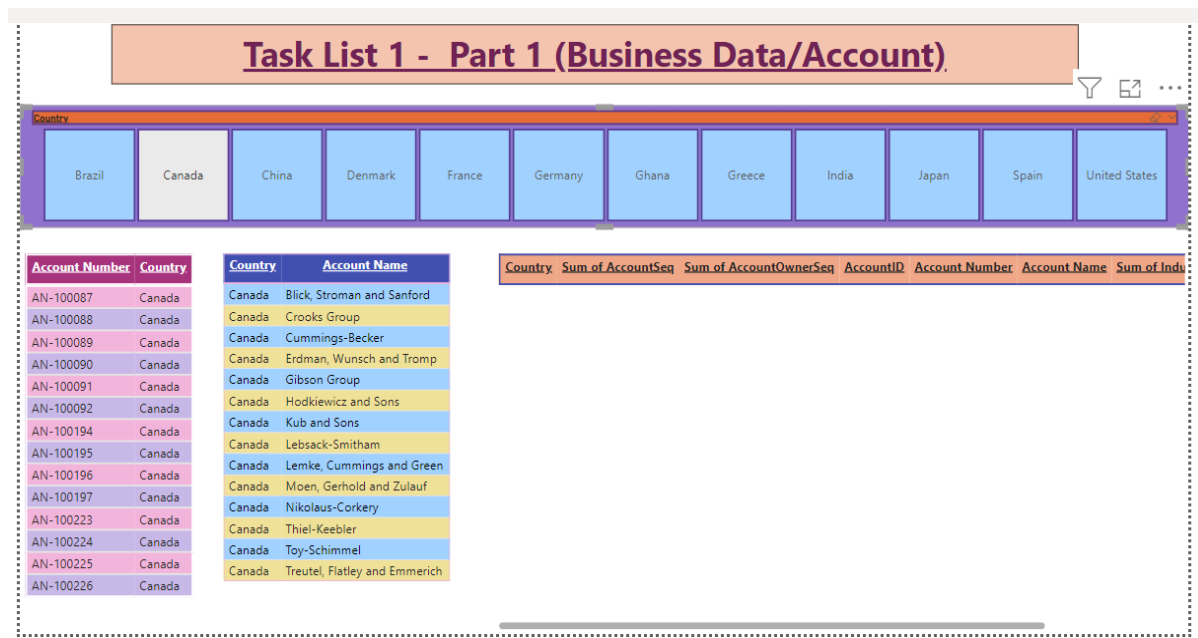 Fig. (a): Visual after selecting the filtered country

Fig. (b): Visual after selecting the unfiltered country

6. **Save the File Once Done:**

- Click on "File" in the top-left corner of Power BI Desktop.

- Choose "Save" to save your Power BI file (.pbix) with the updated pages and visuals.

Conclusion: By following these steps, we can share the insights derived from the data.

TASK LIST 1- Part 2

1. Add a Page into Power BI and Import Worksheets:

- Open your Power BI Desktop file where you imported the "Account" sheet previously.

- Click on the "+" icon next to the existing pages to add a new page.

- Click on "Get Data" from the Home tab.

- Choose "Excel" as the data source type again.

- Navigate to your Business data file and select it.

- Import the worksheets named "Accounts", "Industry", and "Opportunities".

2. Represent the Data as per the Given Criteria:

a. Country-wise Industry and Average Profitability Margin (%)

- Switch to the new page in Power BI.

- Create a new table visual.

- Drag the following fields into the Values area of the table:

  - Country (from the Industry sheet)

  - Industry (from the Industry sheet)

  - Profitability Margin (%) (calculate this if not already available)

- Ensure the Profitability Margin (%) is aggregated as Average (%).

b. Add a Separate Filter for Selective Countries

- Add a slicer visualization.

- Drag the "Country" field from the Industry sheet into the slicer.

- Resize and position the slicer on your report canvas.

- This slicer allows selective filtering of countries for industry and profitability margins.
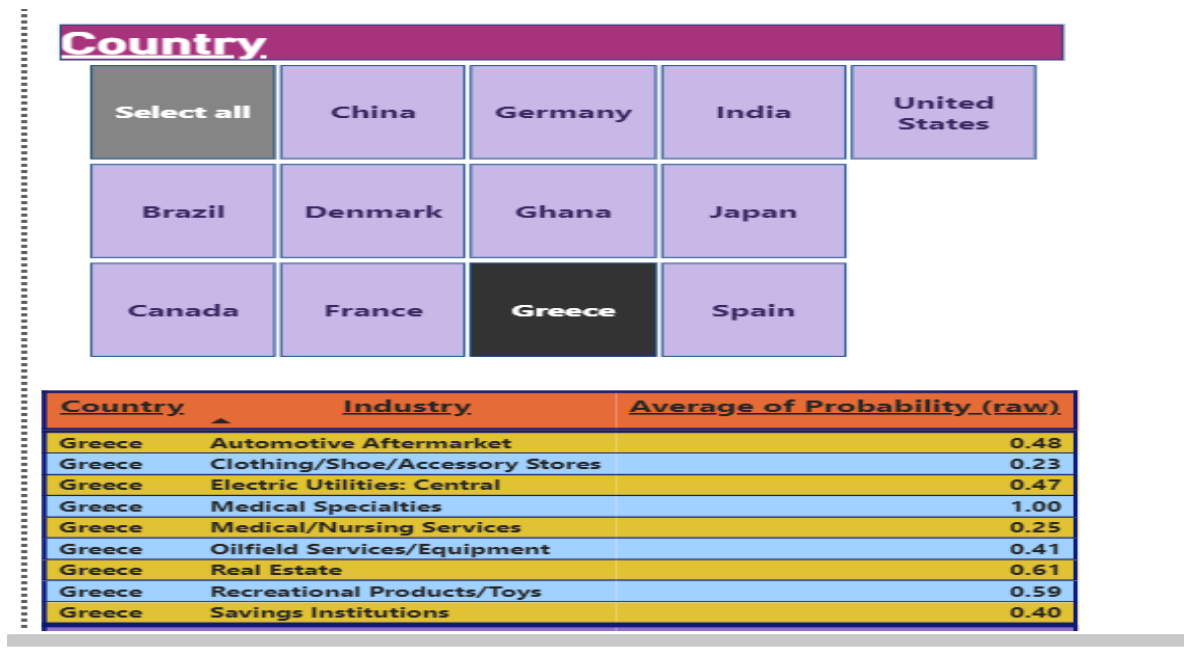
Country

Select all	China	Germany	India	United States
Brazil	Denmark	Ghana	Japan	
Canada	France	**Greece**	Spain	

Country	Industry	Average of Probability (raw)
Greece	Automotive Aftermarket	0.48
Greece	Clothing/Shoe/Accessory Stores	0.23
Greece	Electric Utilities: Central	0.47
Greece	Medical Specialties	1.00
Greece	Medical/Nursing Services	0.25
Greece	Oilfield Services/Equipment	0.41
Greece	Real Estate	0.61
Greece	Recreational Products/Toys	0.59
Greece	Savings Institutions	0.40

Fig. : Visuals after selecting only one country

Country

Select all	Canada	**Denmark**	Germany	Greece	Japan	United States
Brazil	China	France	Ghana	India	Spain	

Country	Industry	Average of Probability (raw)
Denmark	Water Supply	0.37
Brazil	Transportation Services	0.48
Denmark	Transportation Services	0.25
Brazil	Savings Institutions	0.30
Denmark	Savings Institutions	0.61
Brazil	Restaurants	0.28
Denmark	Real Estate Investment Trusts	0.52
Brazil	Real Estate	0.74
Denmark	Property-Casualty Insurers	0.70
Brazil	Precious Metals	0.49
Denmark	Ordnance And Accessories	0.25
Brazil	Major Chemicals	0.41
Denmark	Life Insurance	0.14
Denmark	Diversified Commercial Services	0.25
Brazil	Computer Software: Prepackaged Software	0.44
Brazil	Clothing/Shoe/Accessory Stores	0.48

Fig. : Visuals after selecting two countries

Country						
Select all	Canada	Denmark	Germany	Greece	Japan	United States
Brazil	China	France	Ghana	India	Spain	

Country	Industry	Average of Probability (raw)
Denmark	Water Supply	0.37
United States	Water Supply	0.50
Brazil	Transportation Services	0.48
Denmark	Transportation Services	0.25
United States	Transportation Services	0.31
Canada	Telecommunications Equipment	0.15
Japan	Telecommunications Equipment	0.49
United States	Telecommunications Equipment	0.66
United States	Specialty Foods	0.48
Brazil	Savings Institutions	0.30
Denmark	Savings Institutions	0.61
Germany	Savings Institutions	0.52
Greece	Savings Institutions	0.40
United States	Savings Institutions	0.59
Brazil	Restaurants	0.28
Canada	Restaurants	0.23

Fig. : Visuals after selecting all countries

3. Represent Data Using a Pie Chart:

a. Industry-wise Profitability Percentage

- Create a pie chart and drag the "Industry" field from the Industry into the Values area.

- Drag the Profitability Margin (%) field (average) into the Values area.

- Ensure the Profitability Margin (%) is aggregated as Average (%).

- Use the slicer created in step 2b to filter data by selected countries.

b. Visualization in Single or Multiple Country-wise

- Use the slicer to switch between single or multiple country views for the pie chart.
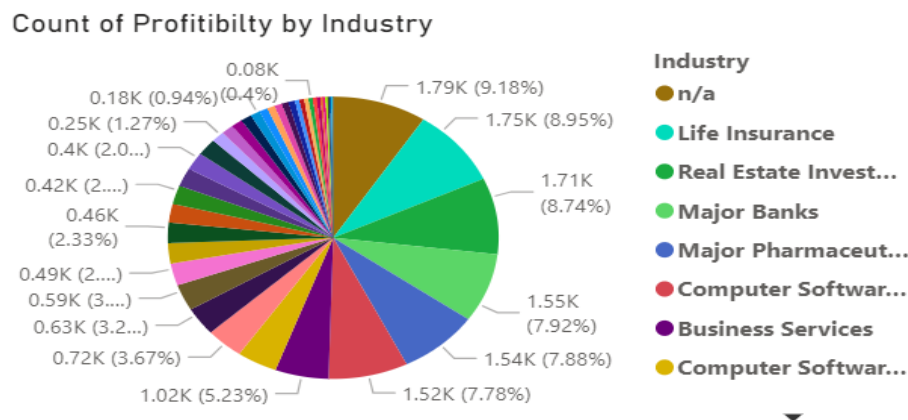
4. **Present Data Using Line & Stacked Column Chart:**

- Create a new Line & stacked column chart visual.

- Drag the "Industry" field into the Axis area.

- Drag the Profitability Margin (%) field (average) into the Values area.

- Use this chart to show industry-wise profitability trends across countries.

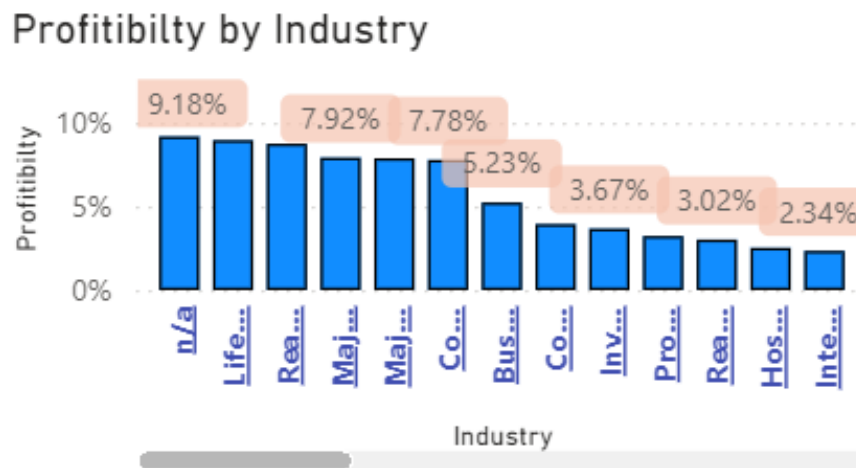- Apply any necessary filters using the slicer.

Fig. : Profitability by Industry using Stacked Column Chart

5. **Present Data Using Map Chart:**

- Create a new map chart visual.

- Drag the "Country" field into the Location area.

- Drag the "Industry" field into the Size or Color saturation area to represent market values or presence.

- Adjust settings to best represent country-wise industry market values and presence.

6. <u>Save the File Once Done:</u>

- Click on "File" in the top-left corner of Power BI Desktop.

- Choose "Save" to save your Power BI file (.pbix) with the updated pages and visuals.

<u>**Conclusion:**</u> By following these steps, we can share the insights derived from the data.