

Module 9: Advanced Analytics in Power BI

Assignment Document

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Scenario: ABC is a leading service provider. It provides services to resolve and track work orders that are created by any customer. It has a well-managed workflow to ensure the work order follows the correct steps and gets assigned to the proper technician. It also manages escalation matrices. XYZ is one of the clients of ABC who uses their services for a new project. The management wants to see the status of all work orders. Using the below-mentioned steps, create a Power BI score card to display goals and trends.

The following are the tasks that need to be performed:

1. Create a goal called **Project Incident Management Process** and create the following sub-goal / sub metric.
 - i. Incidents waiting for approval
 - ii. Critical Backlog incident
 - iii. % PM Compliance
 - iv. % Schedule Compliance
2. Edit the First sub-goal /sub-metric **Incidents while waiting for approval**.
 - i. Provide the current value as 8 and give the target value of 12.
 - ii. Select start and end dates as the start of the year and end of the year, respectively, for the year 2022.
 - iii. Set up rules for status
 1. **On track** - If the value is less than or equal to 12
 2. **At Risk** - If the value is greater than 12

Hint:

The screenshot shows the 'Incidents waiting for approval' status rules configuration window. The window has tabs for 'Details', 'History', 'Status rules', and 'Time period'. The 'Status rules' tab is active. It shows a 'New rule' button and a list of rules. The first rule is 'On track' with the condition 'If Value is less than or equal to 12'. The second rule is 'At risk' with the condition 'If Value is greater than 12'. There is also an 'Otherwise, change status to' section set to 'On track'. The window has 'Save' and 'Cancel' buttons at the bottom right.

- iv. Go to the details tab and enter the following values for each month's check-in:
 1. For 1st April, set the value as 15
 2. For 1st May, set the value as 2
 3. For 1st June, set the value as 5
 4. For 1st July, set the value as 10
 - v. Save your sub-goal / sub metric.
3. Edit the second subgoal **Critical Backlog incident**.
- i. Provide the current value as 60 and give target values of 100.
 - ii. Select start and end dates as the start of the year and end of the year, respectively, for the year 2022.
 - iii. 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.

Hint:

The screenshot shows the 'Critical Backlog incident' configuration window with the 'Status rules' tab selected. It displays three rules for status changes based on value ranges:

Rule	Condition	Change status to
1	If Value is less than or equal to 80	On track
2	If Value is greater than 80 and Value is less than 100	At risk
3	If Value is greater than 100	Overdue

At the bottom of the window, there are 'Save' and 'Cancel' buttons.

- iv. Go to the details tab and enter the following values for each month's check-in:
 1. For 1st April, set the value as 100
 2. For 1st May, set the value as 20
 3. For 1st June, set the value as 120
 4. For 1st July, set the value as 60
 5. For 1st August, set the value as 60
- v. Save your sub-goal / sub metric.

4. Edit the third sub-goal / sub metric **% PM Compliance**.
 - i. Provide target values of 500.
 - ii. Select start and end dates as the start of the year and end of the year, respectively, for the year 2022.
 - iii. Set up rules for status
 1. **On track**: If the value is greater than 10 % of the target
 2. **At Risk**: otherwise

Hint:

The screenshot shows the 'Status rules' configuration for the '% PM Compliance' sub-goal. The 'Status rules' tab is selected. A rule is defined with the condition 'If Value is greater than or equal to 10 % of target', which results in 'Change status to On track'. An 'Otherwise, change status to At risk' rule is also present. The interface includes a '+ New rule' button, an 'Add condition' button, and 'Save' and 'Cancel' buttons at the bottom.

- iv. Go to the details tab and enter the following values for each month's check-in:
 1. For 1st April, set the value as 40
 2. For 1st May, set the value as 20
 3. For 1st June, set the value as 20
 4. For 1st July, set the value as 40
 5. For 1st August, set the value as 400
 - v. Save sub-goal / sub metric.
5. Edit the fourth sub-goal / sub metric **% Schedule Compliance**.
 - i. Provide **target** values of 500.
 - ii. Select start and end dates as the start of the year and end of the year, respectively, for the year 2022.
 - iii. Set up a rule for status.
 1. **On track**: If the value is greater than 80 % of the target
 2. **At Risk**: otherwise

Hint:

The screenshot shows the 'Status rules' configuration window for a sub-goal named '% Schedule Compliance'. The window has tabs for 'Details', 'History', 'Status rules' (which is active), and 'Time period'. A '+ New rule' button is at the top left. The main configuration area shows a rule with the condition 'If Value is greater than 80 % of target'. The 'Change status to' dropdown is set to 'On track'. Below this, there is an 'Add condition' button and a list of conditions with up, down, and delete icons. The 'Otherwise, change status to' dropdown is set to 'At risk'. At the bottom right, there are 'Save' and 'Cancel' buttons.

- iv. Go to the details tab and enter the following values for each month's check-in:
1. For 1st April, set the value as 158
 2. For 1st May, set the value as 103
 3. For 1st June, set the value as 148
 4. For 1st July, set the value as 196
 5. For 1st August, set the value as 196
- v. Save your sub-goal / sub metric.