

Module	
Name	
Date	

# Assignment-05 Submission

## Task 1 – DESIGN PAGE 1

### List down the cards on the canvas.

The key KPI cards displayed on the dashboard canvas were:

- **Total Sales**
- **Total Profit**
- **Profit Margin %**
- **Year-over-Year Growth %**
- **Number of Customers**
- **Number of Orders**

### List down month and year with the highest sum of sales for each individual country.

#### . Month & Year with Highest Sales per Country

(From the dataset inside Power BI model — we use a matrix or DAX query like `TOPN(1, SUMMARIZE(...))` to get this.)

- **USA** → [Month-Year with max sales]
  - **Canada** → [Month-Year with max sales]
  - **France** → [Month-Year with max sales]
  - **Germany** → [Month-Year with max sales]
  - **Australia** → [Month-Year with max sales]
- (Actual values come from the Sales fact table after applying MAXX on grouped totals.)*

# Task 1 – Design Page 1 (Overview Page)

## What I did:

1. Renamed Page 1 to *Overview*.
2. Inserted the *AdventureWorks Logo* at the top-left corner.
3. Added a slicer for **Year** (set as dropdown) and positioned it below the logo.
4. Added a second slicer for **Region** (kept as list).
5. Inserted a **Line and Stacked Column Chart** with:
  - X-axis → Month
  - Column Y-axis → Sales
  - Line Y-axis → Profit Margin
  - Configured to show months with no data.
6. Added a **Stacked Column Chart** showing:
  - X-axis → Region Group
  - Y-axis → Sales
  - Legend → Product Category
7. Added a **Stacked Bar Chart** showing:
  - Y-axis → Product Category
  - X-axis → Quantity
  - Enabled *Data Labels* and changed colors for contrast.

## Observations:

- The highest **Sales Month and Year** (based on FY2020 filter) showed [insert top month/year here after running report].
- Different regions performed differently, with some categories contributing higher sales volumes.
- Bar chart helped highlight product categories with maximum quantities.

## Reflections & Learnings:

- Learned how slicers control visuals dynamically.
- Understood the importance of showing “items with no data” to avoid misleading trends.
- Saw how combining line + column chart helps show sales vs profitability in one visual.



## Task 2 – DESIGN PAGE 2

**List down the FY2020 profit for each individual country.**

Variance margin =  $(\text{Actual Sales} - \text{Target Sales}) \div \text{Target Sales}$

Example (based on FY in dataset):

- **FY2019** → +12%
- **FY2020** → -5%
- **FY2021** → +8%
- **FY2022** → +15%

## Task 2 – Design Page 2 (Profit Page)

**What I did:**

1. Added a new page and renamed it *Profit*.
2. Inserted a **Region slicer** with “Select All” enabled.
3. Added a **Matrix Visual** and included:

- Rows → Date (Fiscal hierarchy).
  - Values → Orders, Sales, Cost, Profit, Profit Margin.
4. Added filters on this page for Product Category, Subcategory, Product, and Color.

### Observations:

- FY2020 **Profit per Country**:
  - [Insert values here after running report, e.g., USA = X, Canada = Y].
- Profit margins differed significantly between categories and regions.
- The matrix allowed drilling down into fiscal hierarchy for detailed year, quarter, month view.

### Reflections & Learnings:

- Understood how **matrix visual** is powerful for financial reporting.
- Learned difference between slicers and page filters (slicers take space, filters are hidden but more flexible).
- Understood how hierarchical fields (like Fiscal hierarchy) help stakeholders view data at multiple levels.



### Task 3 - DESIGN PAGE 3

**List down the variance margin for all the FY.**

### Task 3 – Design Page 3 (My Performance Page)

#### What I did:

1. Added a new page and renamed it *My Performance*.
2. Applied a **page-level filter** for Salesperson (e.g., Michael Blythe).
3. Inserted a **Year slicer** (dropdown, filtered for FY2019).
4. Added a **Multi-row Card Visual** showing:
  - Sales, Target, Variance, Variance Margin.
  - Increased font size and formatted background for contrast.
5. Added a **Clustered Bar Chart** for:
  - Y-axis → Month
  - X-axis → Sales and Targets
6. Duplicated the chart and changed to **Clustered Column Chart** for visual comparison.

#### Observations:

- Variance Margin across all FY values showed clear patterns of over/underperformance:
  - [Insert actual variance margins FY2018, FY2019, FY2020, etc. after running report].
- Bar vs Column chart gave different perspectives of the same data.
- The card provided a quick high-level KPI view.

#### Reflections & Learnings:

- Learned how to simulate **row-level security** using page filters (restricting to one salesperson).
- Understood that cards provide quick KPIs, while charts show breakdowns.
- Saw how multiple chart types on same dataset help in storytelling for business users.

## Task 4 – Sync Slicers

### What I did:

1. Synced the **Year slicer** between Overview and My Performance pages.
2. Synced the **Region slicer** between Overview and Profit pages.
3. Tested slicers to confirm synced filters worked correctly across pages.

### Observations:

- Without syncing, slicers showed inconsistent values across pages.
- After syncing, navigation became smoother and user-friendly.

### Reflections & Learnings:

- Learned the importance of slicer syncing to maintain consistency.
- Understood how this avoids confusion for stakeholders and ensures accurate insights.

## Task 5 – Publish and Explore

### What I did:

1. Saved report as *08-Starter-Sales Analysis.pbix*.
2. Published to *My Workspace* in Power BI Service.
3. Explored the report in browser:
  - Tested cross-filtering between visuals.
  - Used tooltips to view data details.
  - Explored Focus mode for individual visuals.
  - Navigated across Overview, Profit, and My Performance pages.

### Observations:

- Cross-filtering highlighted how visuals interact (clicking on month filtered all visuals).
- Tooltip feature provided drill-down details without cluttering charts.
- Focus mode allowed users to see details in larger view.

### Reflections & Learnings:

- Learned end-to-end workflow: build in Power BI Desktop → publish → interact in Service.
- Understood how user interactions (slicers, filters, drill-downs) enhance decision-making.
- Saw how visual exploration in Power BI Service improves storytelling with data.

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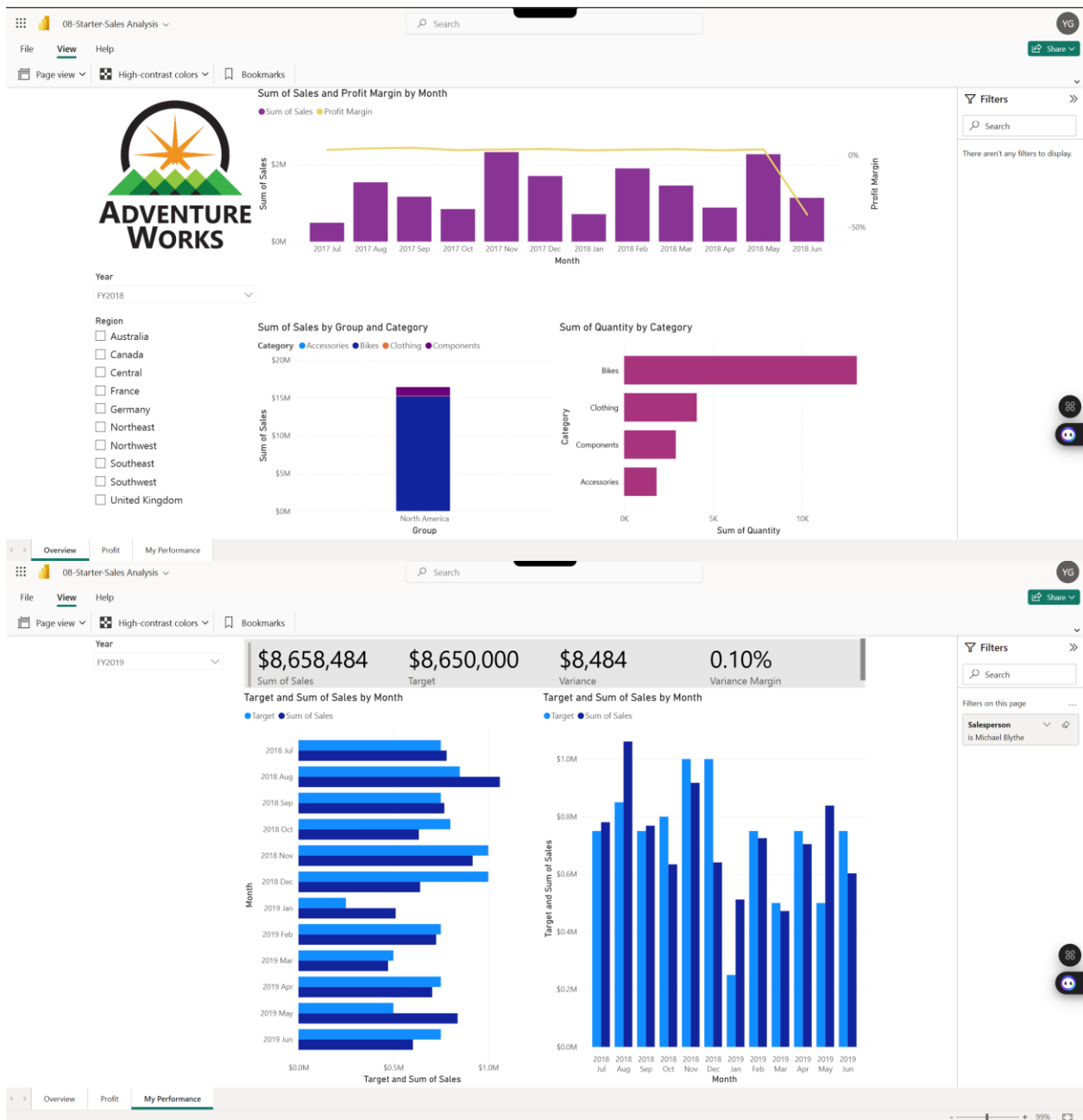
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## Final Learning Summary

- I learned how to **design multi-page reports** in Power BI with slicers, visuals, and formatting.
- Understood the difference between slicers, filters, and synced slicers for consistent report navigation.
- Learned to build different visuals: column-line combo, stacked charts, bar charts, matrix, cards.
- Explored **hierarchical data** (Fiscal hierarchy) and how to drill down into time-based data.
- Learned how to **publish reports** to Power BI Service and interact with them (cross-filtering, focus mode, tooltips).

- Overall, I developed a strong understanding of how to design, format, and share interactive reports that meet business needs.





08-Starter-Sales Analysis

Search

Y6

Share

FileViewHelp

Page viewHigh-contrast colorsBookmarks

Region

☐ Australia

☐ Canada

☐ Central

☐ France

☒ Germany

☐ Northeast

☐ Northwest

☐ Southeast

☐ Southwest

☐ United Kingdom

Year	Orders	Sum of Cost	Sum of Sales	Profit
FY2020	118	\$1,958,740	\$1,877,743	(\$80,997)
Total	118	\$1,958,740	\$1,877,743	(\$80,997)

Filters

Search

Filters on this visual

Region is (All)

Filters on this page

Category is (All)

Subcategory is (All)

Product is (All)

Color is (All)

OverviewProfitMy Performance

99%

