

## CASE STUDY #1

### Overview:

As the lead analyst for **Maven Cycles**, you've been tasked with building out a new Power BI reporting solution using data from SQL databases, Excel workbooks, CSV files, and more. Once built, you'll need to distribute this report to key company stakeholders using Power BI Service.

### Existing Environment:

Below is a summary of the data used by Maven Cycles for reporting:

| Table Name | Column Name   | Data Type |
|------------|---------------|-----------|
| Sales      | date_id       | Integer   |
|            | product_id    | Integer   |
|            | customer_id   | Integer   |
|            | sales_id      | Integer   |
|            | region_id     | Integer   |
|            | stock_date_id | Date      |
|            | transactions  | Integer   |
| Calendar   | date_id       | Integer   |
|            | date          | Date      |
|            | year          | Integer   |
|            | month         | Integer   |
|            | week          | Integer   |
| Regions    | region_id     | Integer   |
|            | region_name   | Varchar   |
|            | manager_id    | Integer   |
| Managers   | manager_id    | Integer   |
|            | full_name     | Varchar   |
|            | username      | Varchar   |
|            | email_address | Varchar   |
| Customers  | customer_id   | Integer   |
|            | full_name     | Varchar   |
|            | email_address | Varchar   |
|            | age           | Integer   |
| Products   | product_id    | Integer   |
|            | name          | Varchar   |
|            | brand         | Varchar   |
|            | unit_cost     | Decimal   |
|            | unit_price    | Decimal   |
| Forecasts  | sales_goal    | Floating  |
|            | date_id       | Integer   |
|            | region_id     | Integer   |

## CASE STUDY #1

### Additional Context:

- IT recently transitioned to authenticating users using Azure Active Directory
- Transactions in the Sales table indicate a distinct transaction
- Sales goals in the Forecasts table are created for next three quarters
- Date\_id in the Calendar table is formatted as *yyyymmdd*
- Month\_id in the Calendar table is formatted as *yyyymm*
- Each region\_id in the Regions table is associated with a single manager\_id

### Reporting Requirements:

- The leadership team would like to be able to see total sales by:
  - Region name (*i.e. "North", "South", "East", "West"*)
  - Month (*i.e. "Apr 2021"*)
  - Customer Age Group (*i.e. "18-24", "25-34", "35-54", "55+"*)
- The VP of Inventory Management has requested visuals showing:
  - Sales transactions, filterable by transaction date and stock date independently
  - Inventory turnover
- Regional managers have requested visuals showing:
  - Transaction trends (*i.e. YTD, Previous Month, Previous Quarter*)
  - Transactions by product
  - Sales transactions compared to goals
- All regional managers should only be able to see their specific region's performance

### Potential Concerns:

With these requirements in hand, you've begun to explore the data and think you've found some potential issues:

- You think there may be negative transaction amounts
- You think there may be inconsistent data types across tables