**HOUSING & TENANCY MANAGEMENT PROJECT**

Project Analysis

This Power BI project provides an end-to-end analytical view of a **housing and tenancy management portfolio**, integrating operational, financial, and compliance data into a single interactive reporting experience. At a high level, the dashboard shows a **large and active portfolio** with around **10,000 tenants across 499 properties**, of which **3,248 tenancies are currently active**, indicating strong utilisation and occupancy. The low number of tenancies **ending soon (4)** suggests short-term stability, reducing immediate vacancy risk. Tenant demographics are evenly distributed across gender categories, and household size analysis shows demand spread across different household types rather than concentration in a single segment, supporting resilience in tenant demand.

From an operational perspective, the **property-level tenancy status visual** highlights a healthy mix of active, closed, and pending tenancies across properties, implying regular turnover rather than systemic issues at specific sites. Financially, the **regional rent analysis** shows that **Bay of Plenty and Otago are the strongest contributors** to total rent revenue, while regions such as Canterbury and Auckland contribute comparatively less, indicating potential areas for optimisation or targeted growth strategies. The **Rent by Month-Year trend** provides a clear temporal view of income patterns and enables users to spot fluctuations or drops over time; this is tightly integrated with a **transaction-level drillthrough**, allowing users to move seamlessly from high-level trends to individual transactions (rent, bond, maintenance, utilities, administration). Finally, the **transaction status distribution** (active, pending, closed) is well balanced, suggesting a stable processing pipeline rather than operational bottlenecks. Overall, the project demonstrates strong data modelling, clear separation of summary vs. detail views, and effective use of drillthrough to support root-cause analysis.
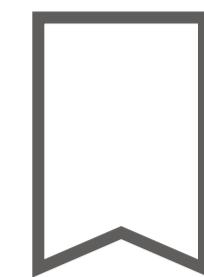
Dashboard

10K	499	3248	4	100
Total Tenants	**Total Properties**	**Active Tenancies**	**Ending Soon**	**Total Complaince**

Clear Filter
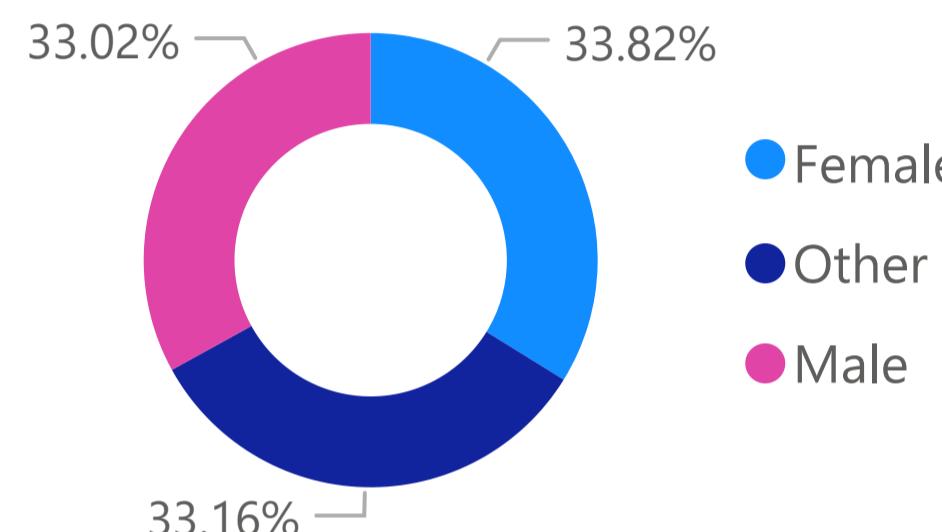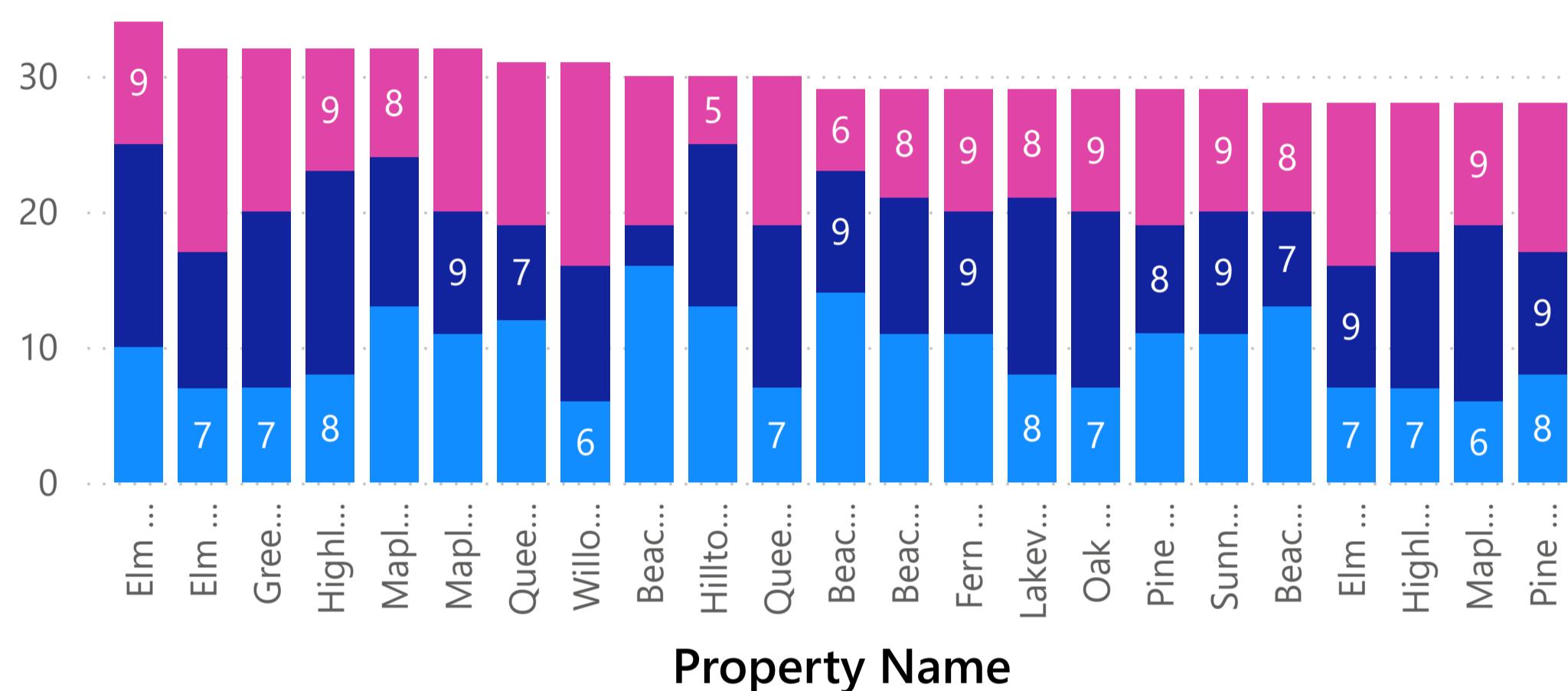
Tenants Gender distribution

- 33.82% Female
- 33.16% Other
- 33.02% Male

Count of TenancyID by Property Name and Status

Legend: Active, Closed, Pending

X-axis: Property Name — Elm..., Elm..., Gree..., Highl..., Mapl..., Mapl..., Quee..., Willo..., Beac..., Hillto..., Quee..., Beac..., Beac..., Fern..., Lakev..., Oak..., Pine..., Sunn..., Beac..., Elm..., Highl..., Mapl..., Pine...
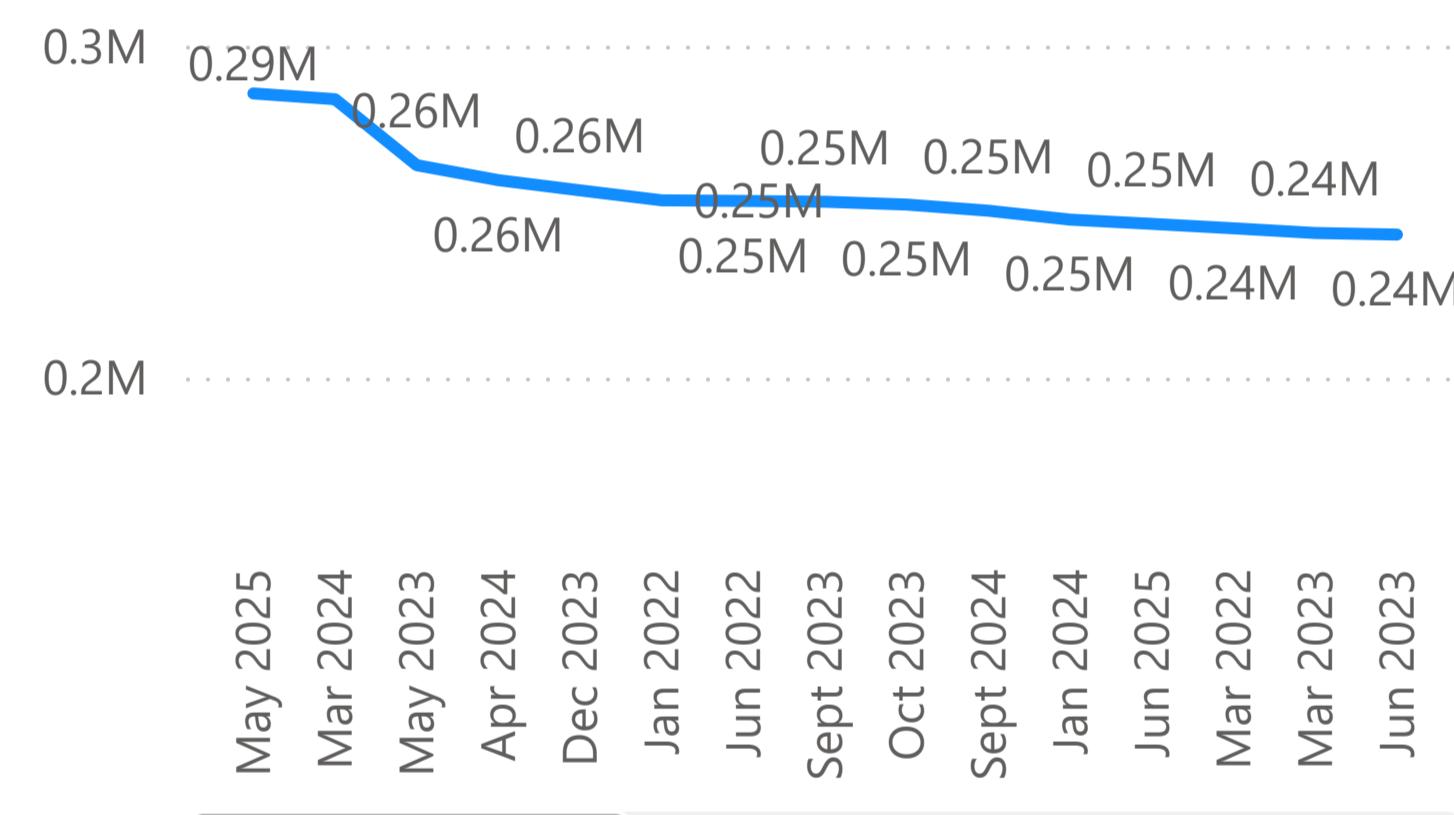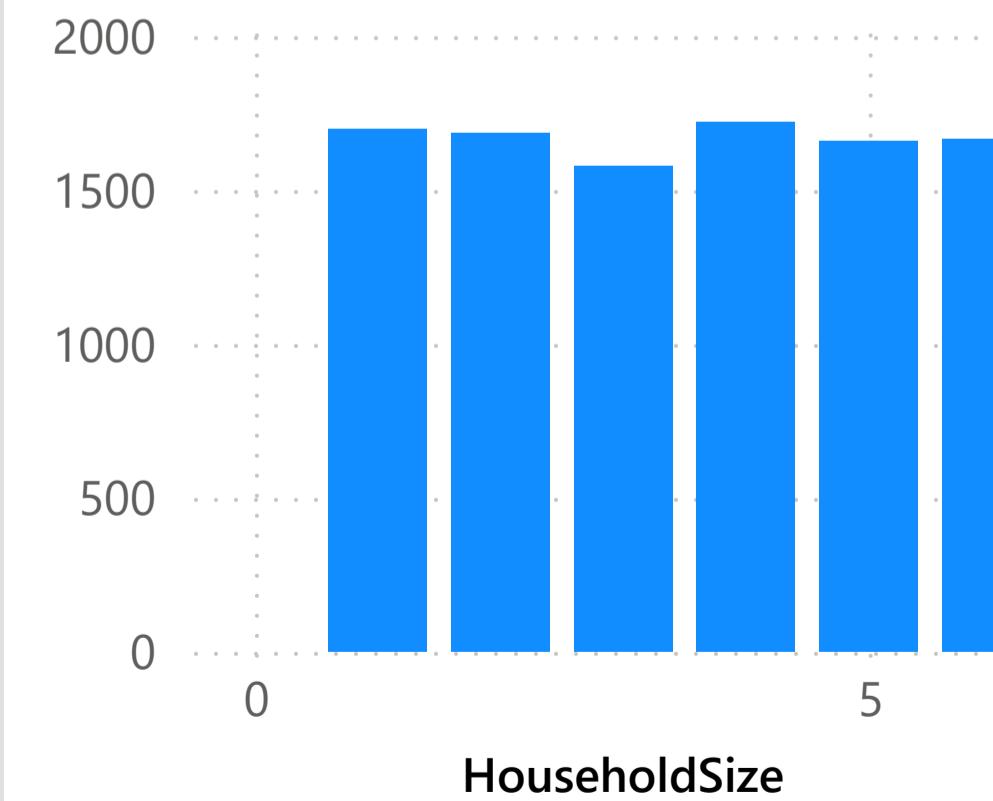
Region
All

Year
All

Rent by Month-Year

Values: 0.29M, 0.26M, 0.26M, 0.26M, 0.25M, 0.25M, 0.25M, 0.25M, 0.25M, 0.25M, 0.25M, 0.24M, 0.24M, 0.24M

X-axis: May 2025, Mar 2024, May 2023, Apr 2024, Dec 2023, Jan 2022, Jun 2022, Sept 2023, Oct 2023, Sept 2024, Jan 2025, Jun 2022, Mar 2023, Jun 2023
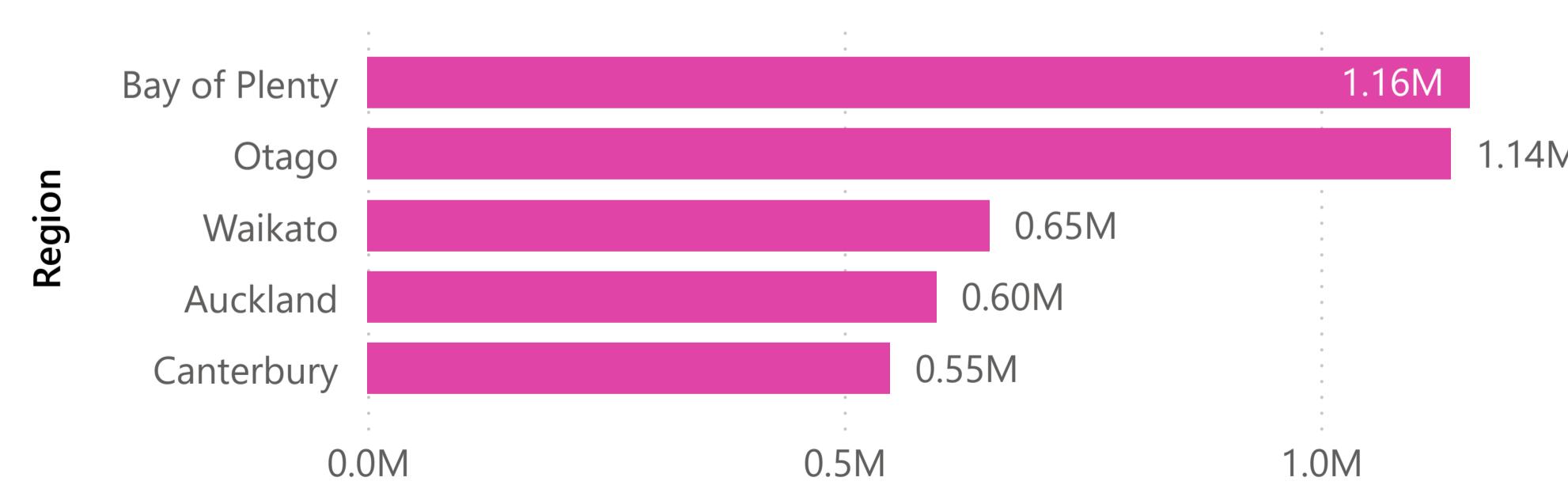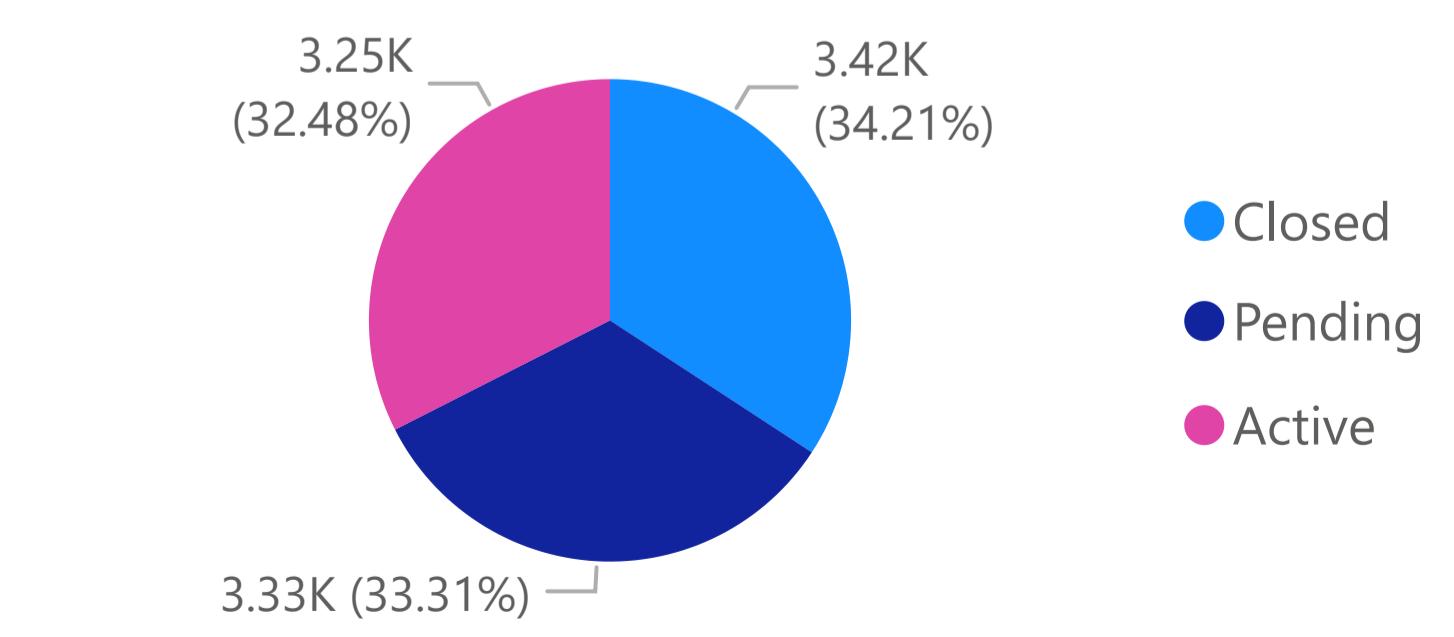
Total Tenants by HouseholdSize

X-axis: HouseholdSize — 0 ... 5

Sum of RentAmount by Region

Region	Value
Bay of Plenty	1.16M
Otago	1.14M
Waikato	0.65M
Auckland	0.60M
Canterbury	0.55M
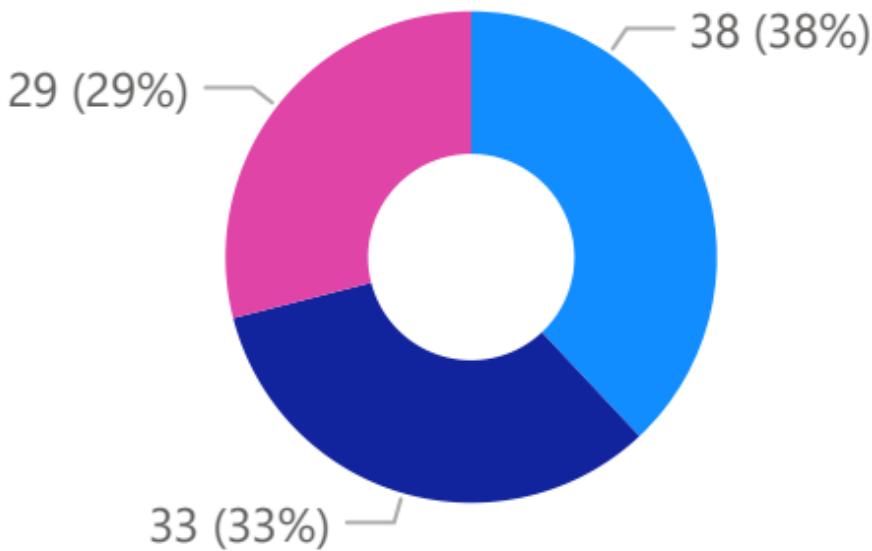
Count of TransactionID by Status

- Closed: 3.42K (34.21%)
- Pending: 3.33K (33.31%)
- Active: 3.25K (32.48%)

TransactionID	TransactionType	Sum of Amount	TransactionDate	Property Name
TX000003	Utilities	1,544.38	Sunday, October 01, 2023	Highland Apartments 4
TX000566	Bond	1,796.84	Sunday, October 01, 2023	Willow Apartments 247
TX001638	Maintenance	1,979.10	Sunday, October 01, 2023	Oak Apartments 17
TX002975	Maintenance	596.90	Sunday, October 01, 2023	Pine Apartments 491
TX003155	Bond	1,690.81	Sunday, October 01, 2023	Queen Apartments 85
TX004948	Rent	1,526.73	Sunday, October 01, 2023	Sunny Apartments 6
TX005562	Administration	373.21	Sunday, October 01, 2023	Elm Apartments 290
TX006709	Bond	1,948.38	Sunday, October 01, 2023	Beach Apartments 30
TX008040	Rent	231.77	Sunday, October 01, 2023	Queen Apartments 108
TX009483	Rent	1,783.03	Sunday, October 01, 2023	Green Apartments 109
TX009780	Repairs	1,490.39	Sunday, October 01, 2023	Lakeview Apartments 218
TX004626	Maintenance	1,286.41	Monday, October 02, 2023	Oak Apartments 360
TX005550	Rent	1,464.55	Monday, October 02, 2023	Fern Apartments 378
TX007478	Utilities	353.57	Monday, October 02, 2023	Pine Apartments 260
TX008530	Administration	369.88	Monday, October 02, 2023	Oak Apartments 448
TX009570	Utilities	846.88	Monday, October 02, 2023	Hilltop Apartments 380
TX001704	Administration	1,823.42	Tuesday, October 03, 2023	Fern Apartments 230
TX002448	Bond	1,067.63	Tuesday, October 03, 2023	Lakeview Apartments 481
TX003208	Rent	962.33	Tuesday, October 03, 2023	Beach Apartments 173
TX003914	Utilities	1,172.32	Tuesday, October 03, 2023	Elm Apartments 236
TX005126	Utilities	968.61	Tuesday, October 03, 2023	Riverside Apartments 8
TX005370	Rent	287.10	Tuesday, October 03, 2023	Queen Apartments 190
TX006501	Maintenance	1,651.19	Tuesday, October 03, 2023	Beach Apartments 258
TX007544	Administration	1,066.48	Tuesday, October 03, 2023	Queen Apartments 300
TX007648	Bond	937.07	Tuesday, October 03, 2023	Highland Apartments 492
TX001555	Utilities	1,494.72	Wednesday, October 04, 2023	Oak Apartments 97
TX002139	Maintenance	1,231.73	Wednesday, October 04, 2023	Willow Apartments 128
TX002247	Rent	1,952.95	Wednesday, October 04, 2023	Oak Apartments 360
TX002852	Administration	584.32	Wednesday, October 04, 2023	Hilltop Apartments 464
TX005697	Bond	1,785.37	Wednesday, October 04, 2023	Maple Apartments 91
TX006000	Administration	1,545.67	Wednesday, October 04, 2023	Green Apartments 324
Total		**252,111.55**		

Count of ComplianceNotes

38 (38%)

29 (29%)

33 (33%)

● Follow-up needed ● Meets standard ● Requires insp...

Key Takeaways from the Visualisation

- **Portfolio stability:** High active tenancy count and very few tenancies ending soon indicate strong short-term occupancy stability.

- **Balanced tenant base:** Even gender and household size distribution reduces dependency on a single tenant segment.

- **Regional performance insight:** Bay of Plenty and Otago drive the majority of rental income, highlighting where revenue strength is concentrated.

- **Actionable time analysis:** The Rent by Month-Year trend allows early detection of income changes and supports proactive financial monitoring.

- **Strong drillthrough design:** Users can move from aggregated trends directly to transaction-level details, improving transparency and auditability.

- **Operational health:** A balanced mix of transaction and tenancy statuses suggests efficient operational workflows rather than backlog accumulation.

- **Decision-ready reporting:** The dashboard successfully supports both strategic oversight (executives/property managers) and operational investigation (finance/compliance teams).