

## GREENVILLE ENT POWER BI DASHBOARD UPDATE PROCESS

Revenue and P&L data delivered from Carla Cullen.

### Revenue Data

1. Copy and paste all records from the raw monthly revenue file into "GENT Revenue.xlsx". Make sure to copy all data as is and that dates are in their short format (##/##/####)
2. Upload the new GENT Revenue file into Sharepoint, replacing the older one there
3. Refresh Power BI dashboard to ensure that the data is refreshed

### P&L Data

1. Rename excel file to the following format: "[##] – [Month] [Year] P&L.xlsx" to match the existing pattern
2. Rename the internal tab as "Data"
3. Upload file to the "Monthly P&L Files" folder in Sharepoint
4. In Power Query:
  - a. Duplicate one of the existing month P&L queries, and then rename to the month you are adding
  - b. Change the file source to the Excel file you uploaded to Sharepoint
  - c. Delete the query step where all columns except the first changed their data type to decimal number. Insert a query step where you select all columns but the first and change their data type to decimal number (columns vary between months so this updates that step)
  - d. Delete the query step where null values are replaced with 0, and then like the previous step, insert a query step where you select all columns except the first and replace all null's with 0's
  - e. Update the query step for the month date to the current month you're adding
  - f. Update the P&L combined query to add the new month query you just added
5. Refresh the dashboard to make sure the new P&L month was added