Challenge:

To prepare a visualizing BI report for Bank Customers from below dataset:

Customer ID	Name	Surname	Gender	Age	Region	Job Classification	Date Joined	Balance
100000025	Jennifer	Hughes	Female	38	England	White Collar	20 January 2015	20505.32
100000028	Alison	Fisher	Female	33	England	White Collar	25 January 2015	3428.56
100000031	Megan	Bell	Female	25	England	White Collar	28 January 2015	38889.76
100000036	Yvonne	Thomson	Female	36	England	White Collar	31 January 2015	31680.67

Analysis:

1) Add the desired data file into the Power BI, in this case we have CSV file which contains following columns:

Customer ID	Name	Surname	Gender	Age	Region	Job Classification	Date Joined	Balance

2) Load the data into Power BI, now it will be visible in Report,Data and Model sections.

3) For getting the bank customers regions, add Region column on work space and Filled Map chart from the Visualization window.

4) Change the data category for the Region column to State or Province.

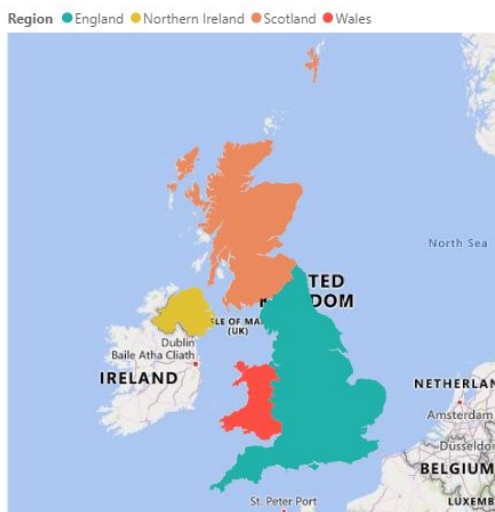Here, Filled Map chart of region:

5) For getting the actual number of customers in total and for specific regions also, we need to add a card which will display the total number of customers in a particular region.

6) Add Card from the visualization section to the workspace and then select Customer ID column in card, it will give us count of customers.
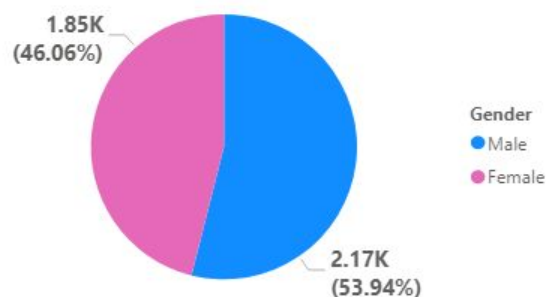
Here, Number of customers with map:

7) Now for visualization to portray the gender split in the customer base, we are going to use a Pie Chart.

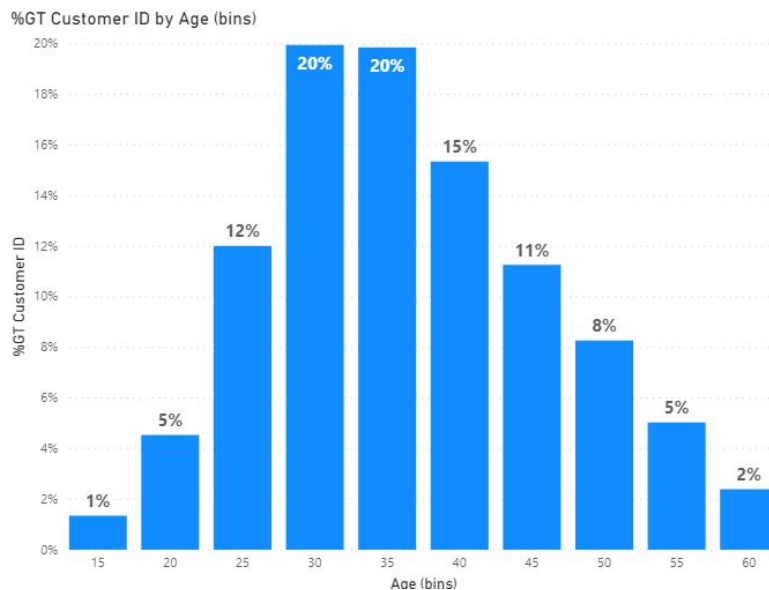8) Add Pie Chart from the Visualization window to the workspace.

9) Now we will create a distribution for the different age groups in our data set.
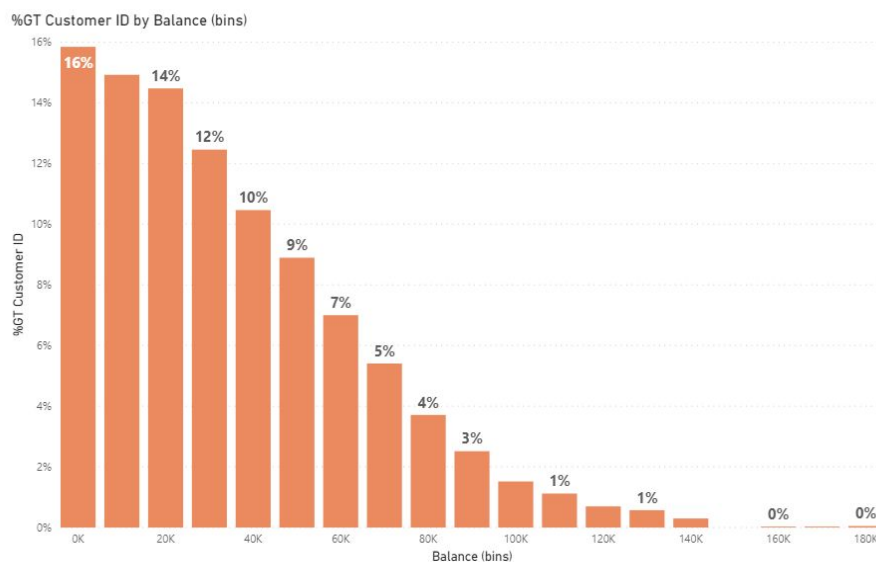
10) As we have Age column in numbers, so for making it into groups:

> Right click on the column in the Field window select New Group,

> Set Bin size to 5 then hit ok.

> Now we can use this new bin column with customer Id on our workspace.

Here, distribution of customers in age groups:

%GT Customer ID by Age (bins)

11) Now, the same process for the Balance column, setting Bin size to 10000.
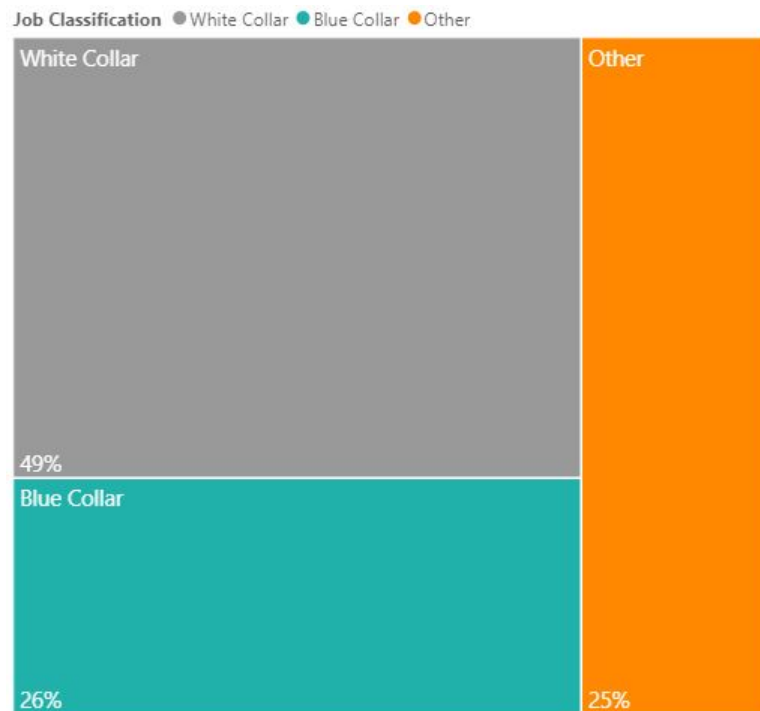

%GT Customer ID by Balance (bins)

12) Now, For portraying visualization of job classification of customers, we need to create a Treemap chart.

13) Select Treemap from the visualization window on workspace.

14) Select columns from the Field window (Job Classification & Customer ID)

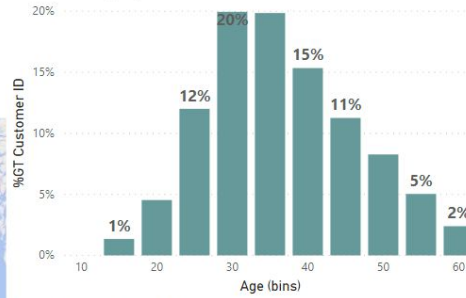Here, visualization of job classification:

15) Now, we need to add all above charts on a single workspace page for presenting the final BI Report of the given dataset.

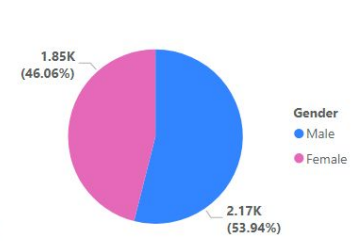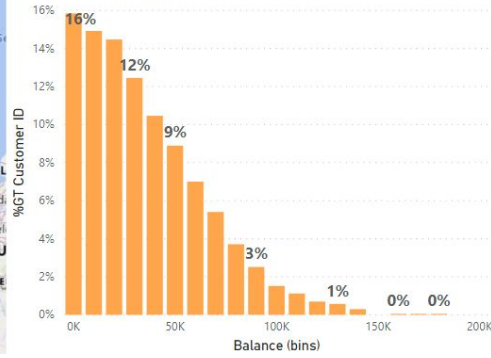> Here final Bi Report for getting visualisation of Bank Customers:

4014

Region ● England ● Northern Ireland ● Scotland ● Wales

Distribution by Age

- 1%
- 12%
- 20%
- 15%
- 11%
- 5%
- 2%

Gender

1.85K
(46.06%)

2.17K
(53.94%)

Gender
● Male
● Female

Distribution by Balance

- 16%
- 12%
- 9%
- 3%
- 1%
- 0%
- 0%

Job Classification

White Collar	Blue Collar
49%	26%
Other	
25%	

Kapil Valecha | Phone : +91 9479883550
Email id : kapilvalechakv@gmail.com