Shield Insurance Analysis Report

Documentation for Power BI Report

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About Shield Insurance Company

➢ *Shield Insurance Company is a leading provider of comprehensive insurance solutions.*

➢ *They are committed to deliver exceptional service and value to their clients.*

➢ *With a strong focus on innovation and customer-centricity, they aim to redefine the insurance landscape by leveraging cutting-edge technologies and data-driven insights.*

Purpose and Scope of The Report

This documentation will provide a guide or demo of the **Shield Insurance Analysis Report** and how to use **Power BI features** to analyze this report various parameters like-

- ➤ *Location*
- ➤ *Age group*
- ➤ *Sales mode*
- ➤ *Popular policies*
- ➤ *Etc.*

Data Sources Used For This Report

The below **CSV files** having data of company's customers and services for last 6 months i.e. **from Nov 2022 – Apr 2023,** have been used as **data sources** for this presentation:

➢ *dim_customer.csv* - *This table contains all the information about the customers*

➢ *dim_date.csv* - *This table contains the dates at daily, monthly levels and week numbers of the year*

➢ *dim_policies.csv* - *This table contains all policies data.*

➢ *fact_premiums.csv* - *This table contains all information about policy orders.*

➢ *fact_settlements.csv* - *This table contains information about policy settlement*

Description of The Report Layout

Home

This page serve as a landing page for this Power BI report from where you can navigate through other desired pages.

General View

This report page provide information about KPIs, Monthly Trends of Revenue Growth & Customer Growth, and other key metrics.

Sales Mode Analysis

This report page provide visual information about key metrics on the basis different sales modes.

Age Group Analysis

This report page provide visual information about customer key metrics on the basis different Age Groups.

How To Navigate Between Different Pages or Sections

For **navigating** between different pages of report,

page navigation button are available on every page.

By clicking on these buttons you can **view and analyse the desired page**.

Interactivity of Report Pages

Filters and slicers in Power BI allow users to narrow down the data displayed in visuals, **enabling focused analysis**. So you have the option to analyse this report by using different slicers and filters available on report pages.
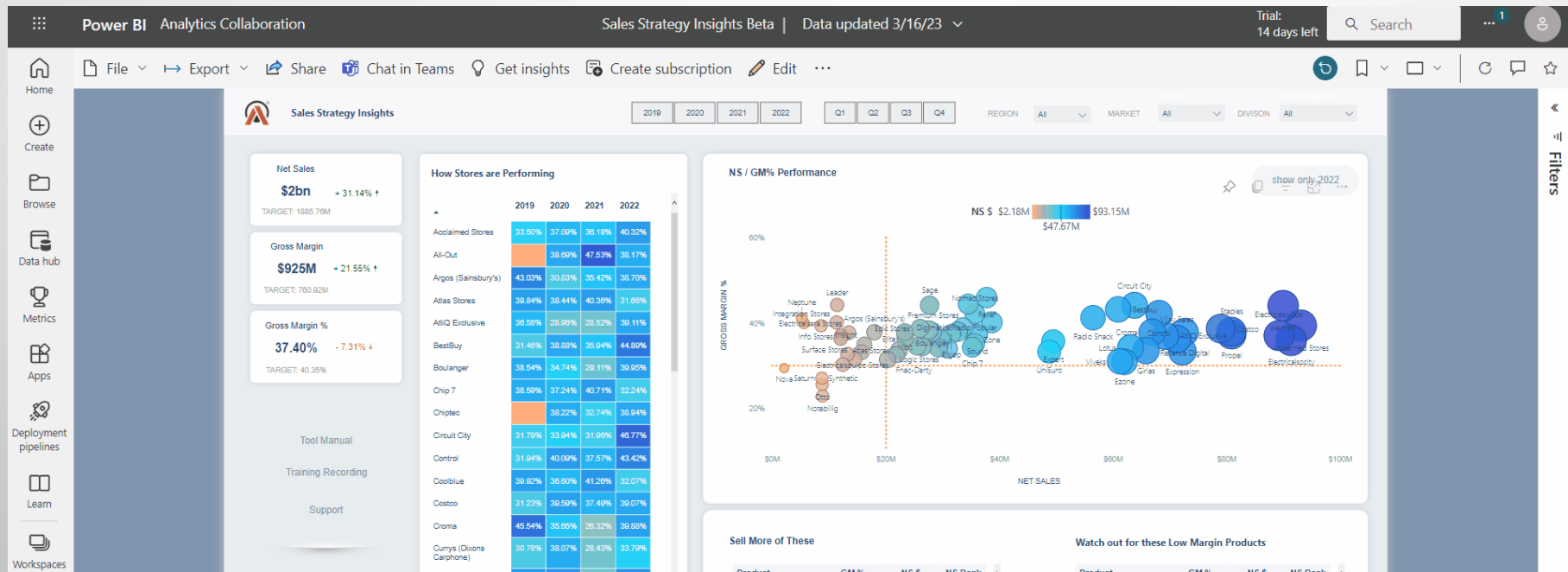
Filters and Slicer Functionality

➢ **Slicers** *act as interactive visual filters, presenting a user-friendly way to manipulate data. These graphical elements provide a selection interface, enabling users to filter data across multiple visuals within a report.*

➢ **Cross-filtering** *represents a powerful relationship between different data elements within Power BI. It enables the filtering of one visual or data set based on the selection made in another visual or data set. Bi-directional filtering, a key feature of cross-filtering, allows data to flow both ways along the relationship.*

Step-by-Step Guide On Using Slicers To Refine Data Views

➢ **How to select one value from drop down -** *For selecting any value from Filter, click on drop-down and choose the desired value.*

➢ **How to select multiple value from drop down -** *To select multiple values in filter, press ctrl key and select as many values as you need to filter your data.*

➢ **How to deselect values one by one -** *To deselect multiple values in filter, press ctrl key and deselect values as you need to remove from the filter list.*

➢ **How to deselect values by using clear filter -** *To remove filter values in one go click on Erase icon given on Top Right of Slicer.*

Step-by-Step Guide On Using Slicers To Refine Data Views

Drilling Down and Drill-Through Feature

You can use Drill-Down and Drill-Through feature available in visuals for more deeper analysis of data.

➢ **Drilling down** *is a powerful feature in Power BI that allows users to explore data at different levels of granularity.*

➢ **Drill-through** *analysis allows users to navigate from one report page to another, focusing on specific details related to the selected data point.*

Conclusion

Thank you for exploring the Shield Insurance Analysis Report in Power BI.

This comprehensive tool has been designed to provide valuable insights into various facets of insurance data,

empowering informed decision-making and strategic planning.

Key Takeaways:

- **Data Insights at Your Fingertips**: *The report offers a comprehensive view of crucial insurance parameters such as location analysis, age-group trends, sales modes, and popular policies.*

- **Interactive Exploration**: *Utilize the interactive elements like filters, slicers, and drill-down features to tailor your analysis and unearth detailed insights relevant to your specific interests.*

- **Effortless Navigation**: *Seamlessly move between different sections and pages of the report to explore various aspects of insurance performance effortlessly.*

Get in Touch

Please reach out to me for any queries, assistance, or additional information, to explore further opportunities or clarify any doubts regarding the insights presented in this report.

Thank you

for your time and engagement with the Shield Insurance Analysis Report. I hope this tool proves invaluable in your data-driven journey towards success.