

TASK LIST 1- Part 1

1. Import the Business Data File into Microsoft Power BI:

- Open Power BI Desktop. - Click on "Get Data" from the Home tab.
- Choose "Excel" as the data source type.
- Navigate to and select your Business data file.
- Click "Import" after selecting the file.

2. Load Only the “Account” Sheet from the Workbook After Transforming the Data:

- In the Navigator window, select the “Account” sheet.
- Click on "Transform Data" to open Power Query Editor.
- Perform any necessary transformations (cleaning, filtering, renaming columns, etc.).
- Close and apply the changes to load only the transformed “Account” data.

3. Represent the Data as per the Given Criteria:

a. Total Count of Account Numbers Against Country (Tabular Format)

- Go to the "Report" view in Power BI Desktop.
- Drag the "Country" field and the "Account Number" field into a table visual.
- Power BI automatically counts the occurrences of each account number per country.

b. Country-wise Account Holder's Names (Table)

- Add another table visual.
- Drag the "Country" and "Account Holder Name" fields into this new table visual.

c. Insert a Slicer for Country-wise Filter

- Go to the "Visualizations" pane.
- Drag the "Country" field into the "Slicer" visualization.

- Resize and position the slicer on your report canvas as desired.

d. Data Representation for Specific Countries (India, Brazil, Greece, France)

- Filter the visuals using the slicer to select India, Brazil, Greece, and France.
- Adjust visuals or create new ones to specifically show data for these countries.

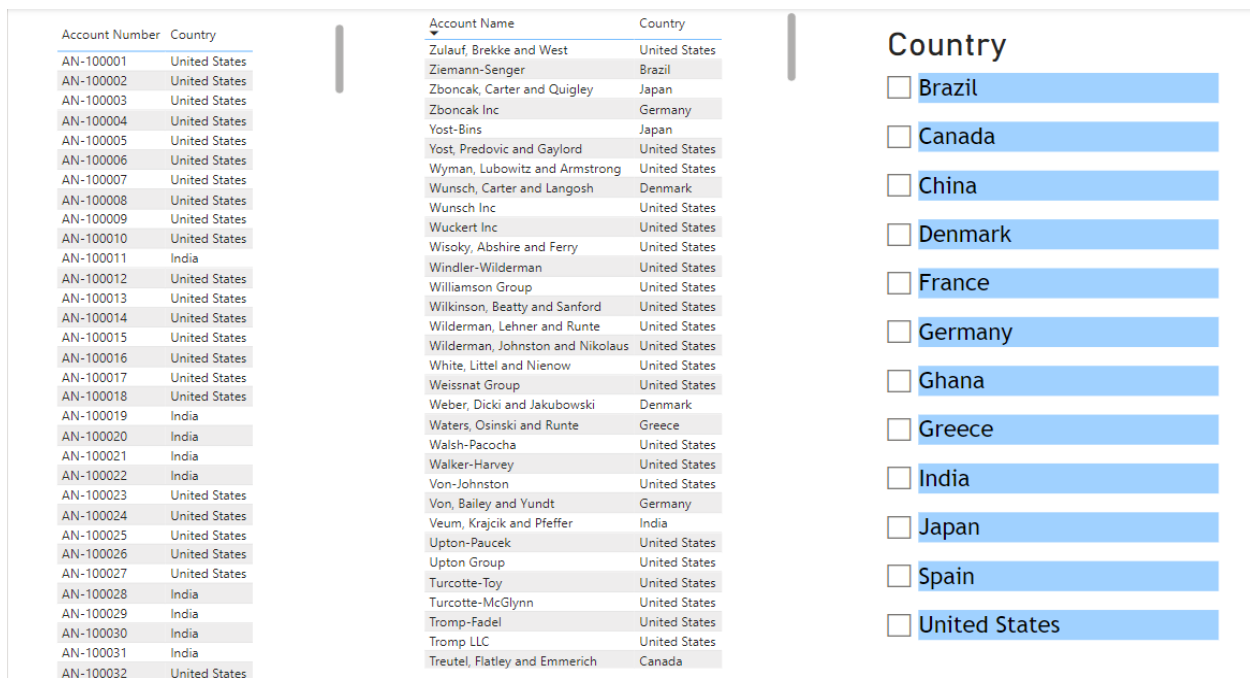


Fig.(1): representation of data –Q3(a,b,c)

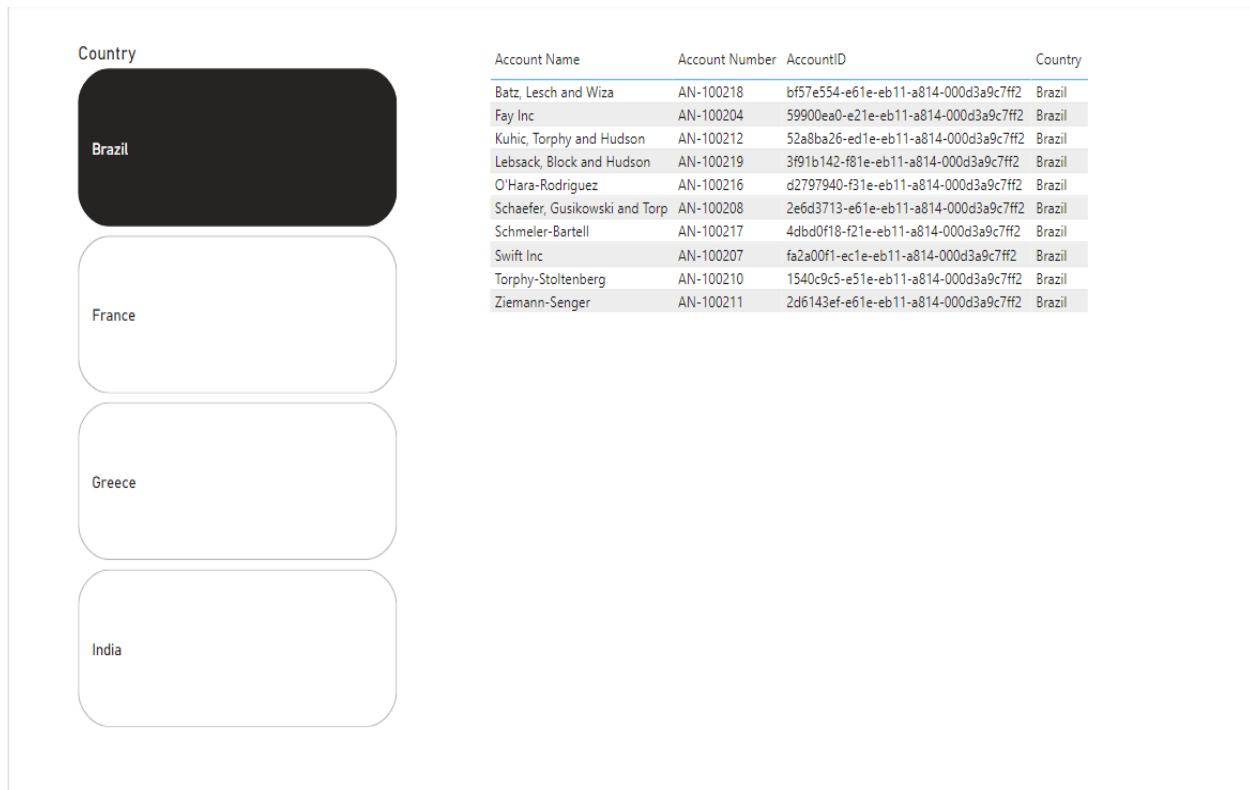


Fig.(2): representation of data –Q3(d)

6. Save the File Once Done:

- Click on "File" in the top-left corner of Power BI Desktop.
- Choose "Save" to save your Power BI file (.pbix) with the updated pages and visuals.

Conclusion:

By following these steps, we can share the insights derived from the data

TASK LIST 1- Part 2

1. Add a Page into Power BI and Import Worksheets:

- Open your Power BI Desktop file where you imported the "Account" sheet previously.
- Click on the "+" icon next to the existing pages to add a new page. - Click on "Get Data" from the Home tab.
- Choose "Excel" as the data source type again.
- Navigate to your Business data file and select it.
- Import the worksheets named "Accounts", "Industry", and "Opportunities".

2. Represent the Data as per the Given Criteria:

a. Country-wise Industry and Average Profitability Margin (%)

- Switch to the new page in Power BI.
- Create a new table visual.
- Drag the following fields into the Values area of the table:
 - Country (from the Industry sheet)
 - Industry (from the Industry sheet)

- Profitability Margin (%) (calculate this if not already available)
- Ensure the Profitability Margin (%) is aggregated as Average (%).

b. Add a Separate Filter for Selective Countries

- Add a slicer visualization.
- Drag the "Country" field from the Industry sheet into the slicer.
- Resize and position the slicer on your report canvas.
- This slicer allows selective filtering of countries for industry and profitability margins.

3. Represent Data Using a Pie Chart:

a. Industry-wise Profitability Percentage

- Create a pie chart and drag the "Industry" field from the Industry into the Values area.
- Drag the Profitability Margin (%) field (average) into the Values area.
- Ensure the Profitability Margin (%) is aggregated as Average (%).
- Use the slicer created in step 2b to filter data by selected countries.

Count of Profitabilty by Industry

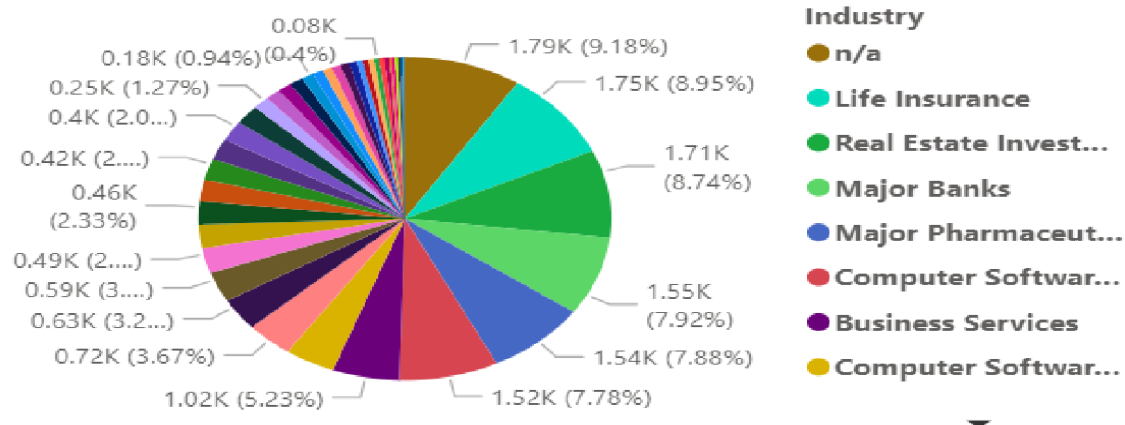


Fig: Industry-wise Profitability Percentage

b. Visualization in Single or Multiple Country-wise

- Use the slicer to switch between single or multiple country views for the pie chart.

4. Present Data Using Line & Stacked Column Chart:

- Create a new Line & stacked column chart visual.
- Drag the "Industry" field into the Axis area.
- Drag the Profitability Margin (%) field (average) into the Values area.
- Use this chart to show industry-wise profitability trends across countries.
- Apply any necessary filters using the slicer.

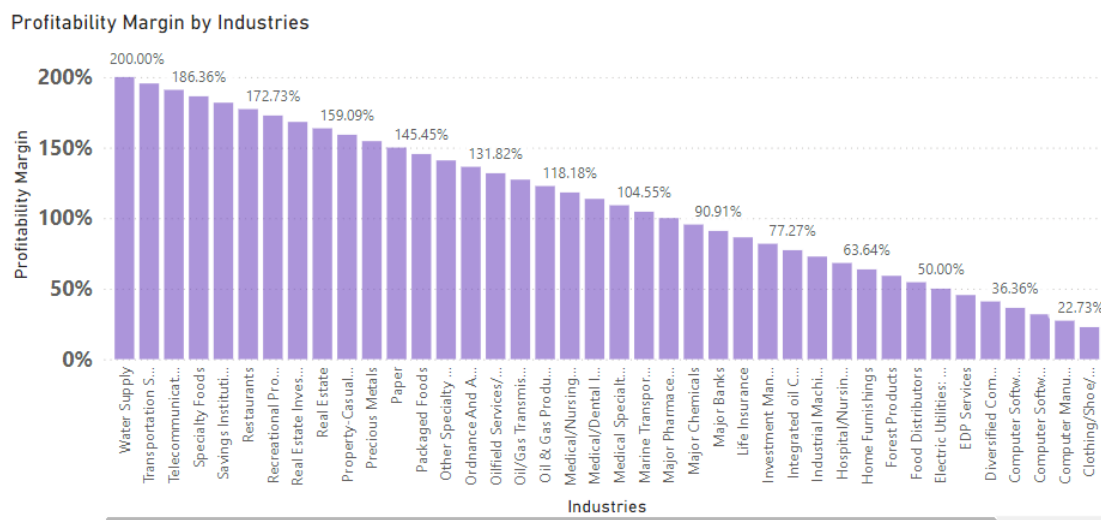


fig: Profitability Margin (%) using Line & Stacked Column Chart

5. Present Data Using Map Chart:

- Create a new map chart visual.
- Drag the "Country" field into the Location area.

- Drag the "Industry" field into the Size or Color saturation area to represent market values or presence.
- Adjust settings to best represent country-wise industry market values and presence.

6. Save the File Once Done:

- Click on "File" in the top-left corner of Power BI Desktop.
- Choose "Save" to save your Power BI file (.pbix) with the updated pages and visuals.

Conclusion:

By following these steps, we can share the insights derived from the data.