

## Lab 2 – Tasks 3 to 5 Summary

---

### ✓ Task 3: Visualize the Percentage of Outstanding Loans by Status

#### Goal:

Help Trevor's team understand the **distribution of loan statuses** (e.g., current, late, default).

#### Steps:

1. Open your **Loan Insights** dashboard → click **Edit**.
2. Click **Add Tile** → choose **Loan Details Explore**.
3. In the **All Fields** tab, expand **Loan**.

#### Key Questions & Answers:

- Which dimension and measure should you use?  
✓ Outstanding Loans Amount (dimension) and Loan Status (measure)
- Best visualization type for part-to-whole relationships?  
✓ Pie chart

#### Challenge Instructions:

- Use the selected dimension and measure.
- Set the title: **Percentage of Outstanding Loans**.
- Save the tile to your dashboard.

---

### ✓ Task 4: Visualize Total Count of Outstanding Loans by State

#### Goal:

Identify the **top 10 states** with the highest number of outstanding loans.

#### Steps:

1. Add a new tile from the **Loan Details Explore**.
2. Select the appropriate dimension and measure.

#### Key Questions & Answers:

- Which dimension and measure should you use?  
✓ State (dimension) and Outstanding Count (measure)

- **Best visualization type for comparing categories?**  
✓ **Bar chart** (ideal for ranked comparisons)

### Challenge Instructions:

- Limit results to **top 10 states**.
  - Title the tile: **Total Count of Outstanding Loans**.
  - Save it to your dashboard.
- 

### ✓ Task 5: Visualize Top 10 Customers by Highest Income

#### Goal:

Display the **top 10 customers** who:

- Own their homes outright
- Have **current** loans
- Have the **highest annual income**

#### Steps:

1. Add a new tile from the **Loan Details Explore**.
2. Use **filters** to include only:
  - Homeownership = Own
  - Loan Status = Current
3. Select the following **dimensions**:
  - Customer ID
  - Annual Income
  - State
  - Interest Rate

#### Key Instructions:

- **No measures** are needed.
- Sort by **Annual Income descending**.
- Limit to **top 10 rows**.
- Use a **table** visualization for easy sorting.
- Title the tile: **Top 10 Customers by Highest Income**.
- Save it to your dashboard.