SCENARIO

VanArsdel is a company that manufactures and sells sporting goods. The company has offices in the United States (US) and several other countries. Its sales comprise of US sales and International sales. VanArsdel’s sales come from its owned manufactured products, as well as other manufacturers’ products.

Let's start with an easy one. You want to show VanArsdel's sales (revenue) and units for each month and year in a single report. You choose to show this using two Matrix visualizations.

1.Start with the "Lab 3 - Starting.pbix" file.

2.Open the Report view.

3.Drag the Total Sales field from the Sales table to the report and create a chart.

4.Drag the MonthName and Year fields from the Date table to the chart.

5.Modify the chart to use the Matrix visualization.

6.Arrange so that the month is shown as the rows and the year is shown as the columns of the matrix visualization.

7.Repeat Step 3 to 6, but this time, display the Total Units field in the chart.

8.Add a Text Box to the report and enter VanArsdel Sales and Units as the text.

9.Rename the report sheet to Sales and Units.

Now that you have the big picture, let's start analyzing the data sales data by product category, segment and manufacturer.

1.Create a new report page by clicking the Yellow "+" icon at the bottom of the report view.

2.Drag the Total Sales field from the Sales table to the report and create a chart.

3.Drag the Category and Segment fields from the Products table to the chart.

4.Modify the chart to use the 100% Stacked Bar Chart visualization.

5.Ensure that the Category is shown as the Axis and the Segment is shown as the Legend of the visualization.

6.Customize the format of the visualization and turn on the Data Labels. Set the Precision to 0.

7.Drag the Total Sales field from the Sales table to the report and create a chart.

8.Drag the Manufacturer field from the Manufacturers table to the chart.

9.Modify the chart to use the Treemap visualization.

10.Drag the MonthName field from the Date table to the report and create a chart.

11.Modify the chart to use the Slicer visualization.

12.Drag the Year field from the Date table to the report and create a chart.

13.Modify the chart to use the Slicer visualization.

14.Rename the report sheet to Sales Breakdown.

You would like to know more about the relationship between total units and total sales by category and segment. You choose to analyze this using scatter chart.

1.Create a new report page by clicking the Yellow "+" icon at the bottom of the report view.

2.Create a chart based on the Scatter Chart visualization.

3.Drag the Total Sales and Total Units fields from the Sales table to the chart.

4.Drag the Category and Segment fields from the Products table to the chart.

5.Drag the YTD Sales field from the Sales table to the chart.

6.Drag the Year field from the Date table to the chart.

7.Ensure that the following fields are set in the visualization:

•Details: Category

•Legend: Segment

•X Axis: Total Sales

•Y Axis: Total Units

•Size: YTD Sales

•Play Axis: Year

Let's do some trend analysis. First let's show a chart to compare Total Sales and Total Units throughout the years. And then let's show two more charts showing the Total Sales and Total Units variances throughout the years.

1.Create a new report page by clicking the Yellow "+" icon at the bottom of the report view.

2.Drag the Year field from the Date table to the report and create the first chart.

3.Drag the Total Sales and Total Units fields from the Sales table to the chart.

4.Modify the chart to use the Line and Stacked Column Chart visualization.

5.Ensure that the Year is shown as the Shared Axis, Total Sales is shown as the Column values, and Total Units is shown as the Line values of the visualization.

6.Create the second chart based on the Waterfall Chart visualization.

7.Drag the Sales Var field from the Sales table to the chart.

8.Drag the Year field from the Date table to the chart.

9.Create the third chart, also based on the Waterfall Chart visualization.

10.Drag the Total Units Var field from the Sales table to the chart.

11.Drag the Year field from the Date table to the chart.

12.Add a Text Box to the report and enter Yearly Trend as the text.

13.Rename the report sheet to Yearly Trend.

You now want to analyze individual products sales (revenue) and volume (units). You decide to show these using two bar charts.

1.Create a new report page by clicking the Yellow "+" icon at the bottom of the report view.

2.Drag the Total Sales field from the Sales table to the report and create a chart.

3.Drag the Product field from the Products table to the chart.

4.Modify the chart to use the Bar Chart visualization.

5.Ensure that the chart is sorted by Total Sales.

6.Drag the Total Units field from the Sales table to the report and create a chart.

7.Drag the Product field from the Products table to the chart.

8.Modify the chart to use the Bar Chart visualization.

9.Ensure that the chart is sorted by Total Units.

10.Drag the Year field from the Date table to the report and create a chart.

11.Modify the chart to use the Slicer visualization.

12.Add a Text Box to the report and enter Top Products as the text.

13.Rename the report sheet to Top Products.