BSBXBD406

ASSESSOR GUIDE – Part 3 of 3

Present big data insights

Assessment 4 of 5

Project

Version 1

Part E: Integrate feedback into big data presentation

To complete this part of the assessment, you are required to:

- carefully read the scenario details outlined within this section
- use the *Power BI Desktop* technology platform to integrate the feedback.

Scenario continued:

You have received the following email from your supervisor Mia Gonzales, briefing you about the next task.

From: Gonzales, Mia
To: Student Lastname, Student Firstname

Subject: Integrating feedback into big data presentations

Hi <student name>,

Thank you for sending out the feedback forms to the stakeholders. I have followed up with both Karen and Daniel and have collated their feedback on the presentations for further action.

Your next task is to integrate the received feedback for each presentation. There are some design and aesthetic changes as well as some additional functions that need to be integrated into both presentations.

Please review the following feedback and integrate those requested changes/amendments to the POCs.

I have put together some checklists (Tables 14 & 16) to help you effectively integrate the feedback changes into the POCs.

All the best and kind regards,

Mia Gonzales
Chief Data Officer (CDO)
Mia.Gonzales@ausretail.com.au

AUS Retail

Before printing this email please consider the environment.
This message may contain privileged information or confidential information or both and is intended for the recipient named. If you are not the intended addressee, please delete it and notify the sender.

E1. Integrate feedback for 'Presentation #1' POCs

In this task, you will integrate the feedback received from the project sponsor into the dashboard and report pages of 'Presentation #1' considering the information outlined in the email from your supervisor.

Continue to use the same Power BI work file *Presentation #1_POCs_YourName_ddmmyyyy.pbix* from task **B6.**

Feedback received from the project sponsor:

- **Feedback 1:** Include 12M Rolling Average as a secondary y-axis for the monthly Sales breakdown visual in the dashboard.
- **Feedback 2:** Change the background colour of the centre key figure (Gross Margin %) on the dashboard to a different colour (preferably a shade of yellow) to highlight and draw attention to at first glance.
- **Feedback 3:** Change the total values displayed on the tooltip for each store location, to show as a percentage of the grand total within each state, instead of the actual value.
- **Feedback 4:** On the store performance report page, display the **Sales YoY%** values as icons instead of the actual percentage values. Preferably use coloured (green, yellow, red) arrow icons.

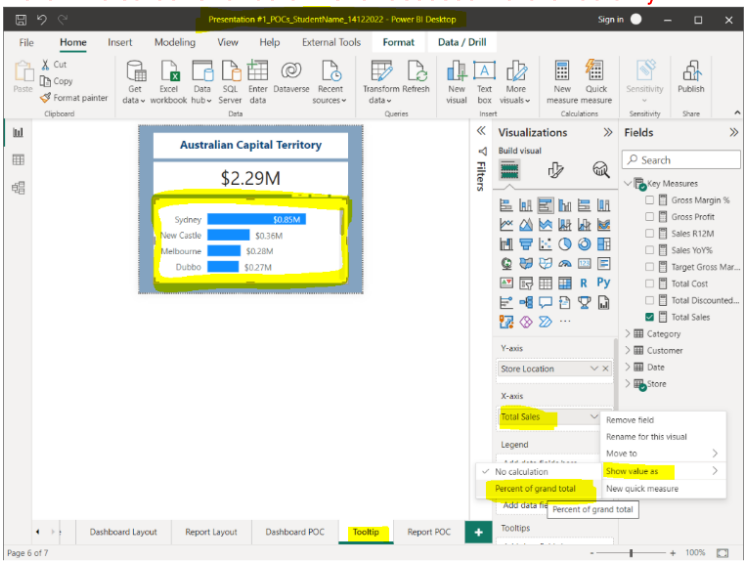
Task:

Integrate the feedback received from the project sponsor to the 'Presentation #1' POCs by completing the sub-tasks in the following checklist.

Table 14- Checklist for integrating feedback into the 'Dashboard POC' page.

#	Task details	Tick/check ☒ once completed.
	Do the following in the '*Report' view* of Power BI Desktop.	

1	Create a new measure called 'Sales R12M' to calculate the rolling average for 'Total Sales'. Use the following DAX statement to perform the complex calculation.
	`Sales R12M =`
	`VAR NumOfMonths = 12`
	`VAR LastSelectedDate = MAX('Date'[Date])`
	`VAR Period =`
	`DATESINPERIOD('Date'[Date], LastSelectedDate, -NumOfMonths, MONTH)`
	`VAR Result =`
	`CALCULATE(`
	`AVERAGEX(`
	`VALUES('Date'[Year Month Number]),`
	`[Total Sales]`
	`),`
	`Period`
	`)`
	`RETURN`
	`Result`
		☐

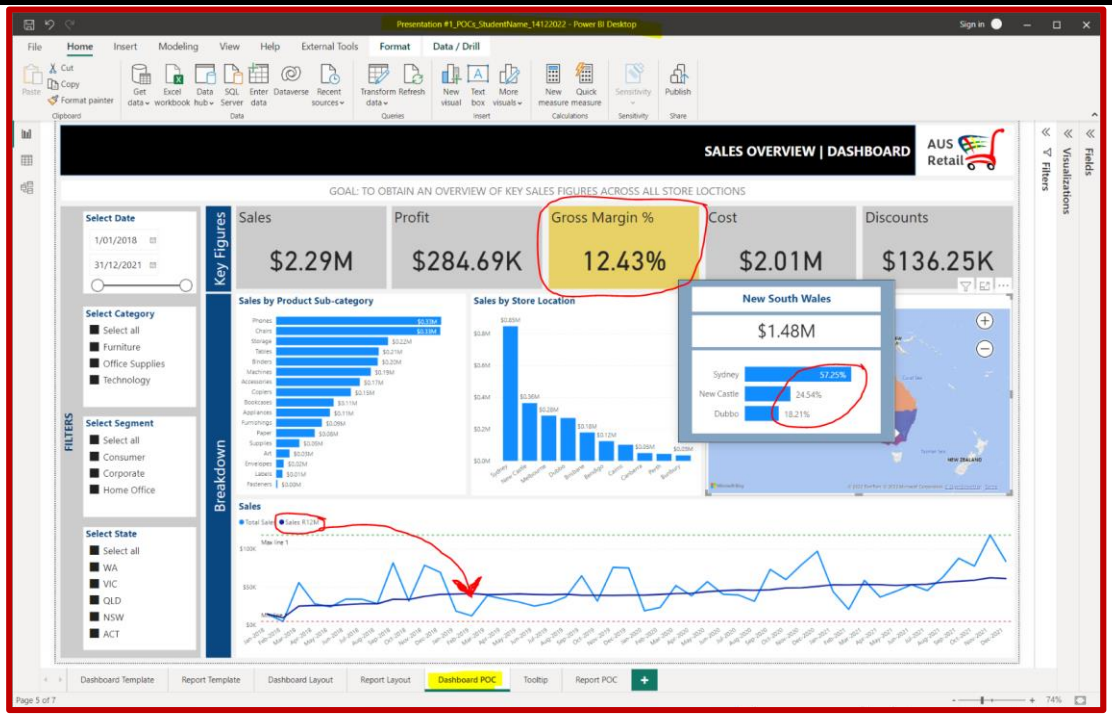
2	Action **Feedback 1**, by adding the 'Sales 12M' figure to the correct visual in the 'Dashboard POC' page.	☐
3	Action **Feedback 2** on the 'Dashboard POC' page. Change the background colour of the required key figure visual to '#E8D166'	☐
4	Action **Feedback 3,** by making the necessary changes to the values displayed on the tooltip visual in the 'Tooltip' page. **Assessor guidelines:** The student must: • select the visual in the tooltip • Go to 'Visualizations' pane, then right-click on the 'Total Sales' value and in the X-axis input field • Select the option to 'Show value as' > 'Percent of grand total'. [Refer to the following screenshot showing the steps] Note: The screenshot below is for assessor reference only.  Figure 23 – Steps to action Feedback 3 using Power BI Desktop © Microsoft	☐

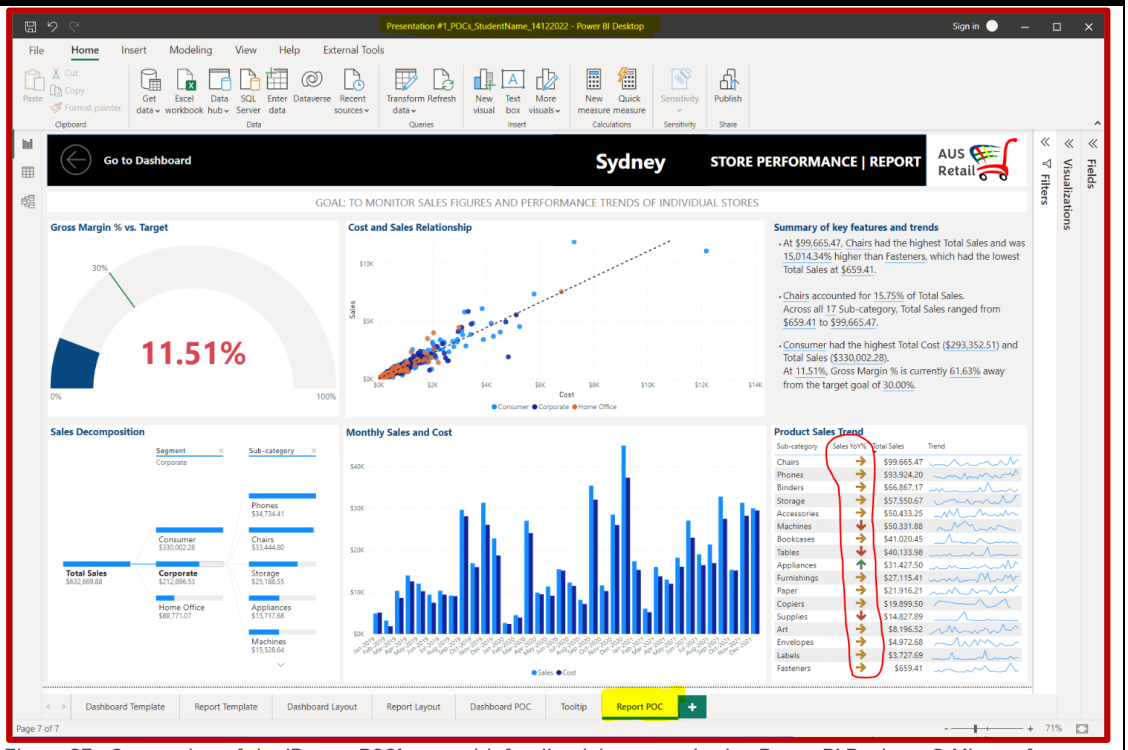
#	Task details	Tick/check ☒ once completed.
5	Action **Feedback 4** on the 'Report POC' page by applying the appropriate conditional formatting to the 'Sales YoY%' field. **Assessor instructions:** The student should format the 'Sales YoY%' values to display as icons only.	☐

Screenshot evidence:

Assessor instructions: The screenshots provided may have different values due to different contexts/filters selected by the student. However, the screenshots must indicate similar modifications to what is displayed in the sample screenshots provided as evidence of integrating the feedback. The changes/modifications on each POC pages are circled in red for ease of identification.

Table 15 – Evidence of integrating feedback into 'Presentation #1' POCs

Required evidence:	Screenshot
Screenshot of the 'Dashboard POC' page. **Note:** The screenshot must clearly show the following details: ☐ 'Report' view of the Power BI work file. ☐ Title bar of Power BI Desktop showing the file name that includes your name initials and current date. ☐ Full view of the 'Dashboard POC' page showing the integration of **Feedback 1, and 2.** ☐ The tooltip page is displayed when hovering over the map visual showing the integration of **Feedback 3.**	 Figure 24 – Screenshot of the 'Dashboard POC' page with feedback integrated using Power BI Desktop © Microsoft

Required evidence:	Screenshot
Screenshot of the 'Report POC' page. **Note:** The screenshot must clearly show the following details: ☐ 'Report' view of the Power BI work file. ☐ Title bar of Power BI Desktop showing the file name that includes your name initials and current date. ☐ Full view of the 'Report POC' page showing **Feedback 4** integrated.	 Figure 25 – Screenshot of the 'Report POC' page with feedback integrated using Power BI Desktop © Microsoft

E2. Integrate feedback for 'Presentation #2' POCs

In this task, you will integrate the feedback received from the project sponsor into the dashboard and report pages of 'Presentation #2' considering the information outlined in the email from your supervisor.

Continue to use the same Power BI work file *Presentation #2_POCs_YourName_ddmmyyyy.pbix* from task **C5.**

Feedback received from the project sponsor:

- **Feedback 1:** On the dashboard, change the background colour of the downtime key figure to a different colour (preferably a shade of yellow) to highlight and draw attention to at first glance.
- **Feedback 2:** On the report page, change the 'Defect Reports by Vendor' line chart to only display the Top 5 vendor details only, as the chart otherwise appears to be too busy.
- **Feedback 3:** On the report page, add data bars to help visualise the variation of the numerical values in the 'Defect reports by defect type' table on the report page.
- **Feedback 4:** On the report page, add a new table to report on 'Vendors with low no. of defect reports'. Perhaps position it underneath the 'Defect reports by product category' bar chart visual. Also, ensure that only the vendor names that have reported less than two (2) 'Total Defect Reports', are listed on the table.

Task:

Integrate the feedback received from the project sponsor to the 'Presentation #2' POCs by completing the sub-tasks in the following checklist.

Table 16 – Checklist for integrating feedback into the 'Dashboard POC' page.

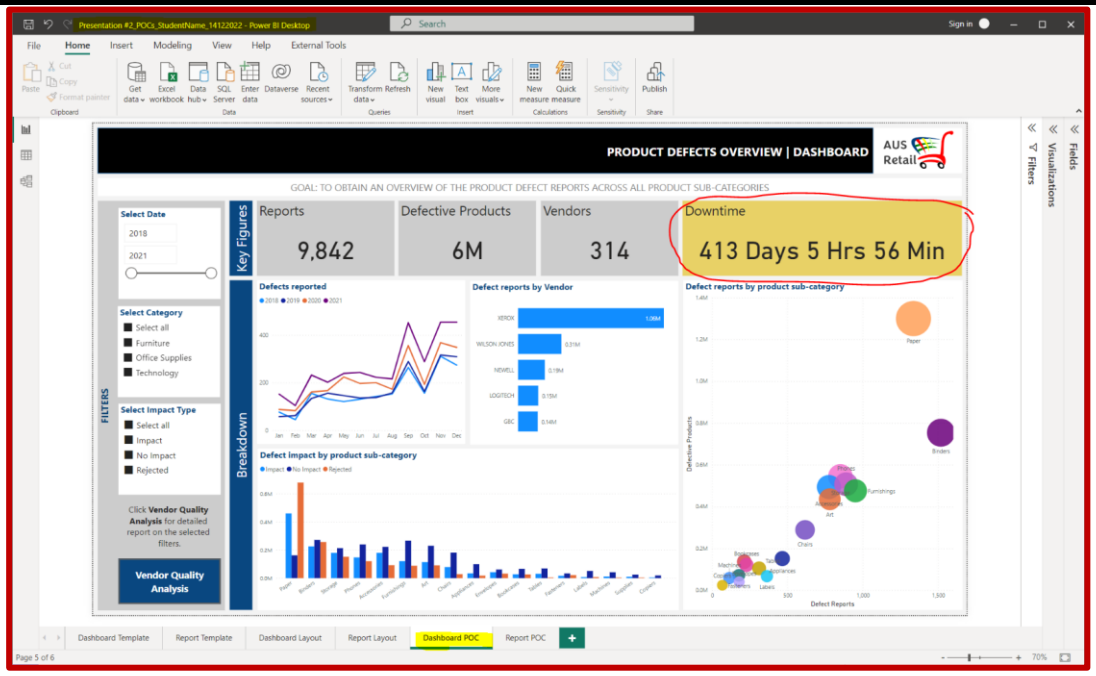
#	Task details	Tick/check ☒ once completed.
	Do the following in the '*Report' view* of Power BI Desktop.	
1	Action **Feedback 1** on the 'Dashboard POC' page.	☐

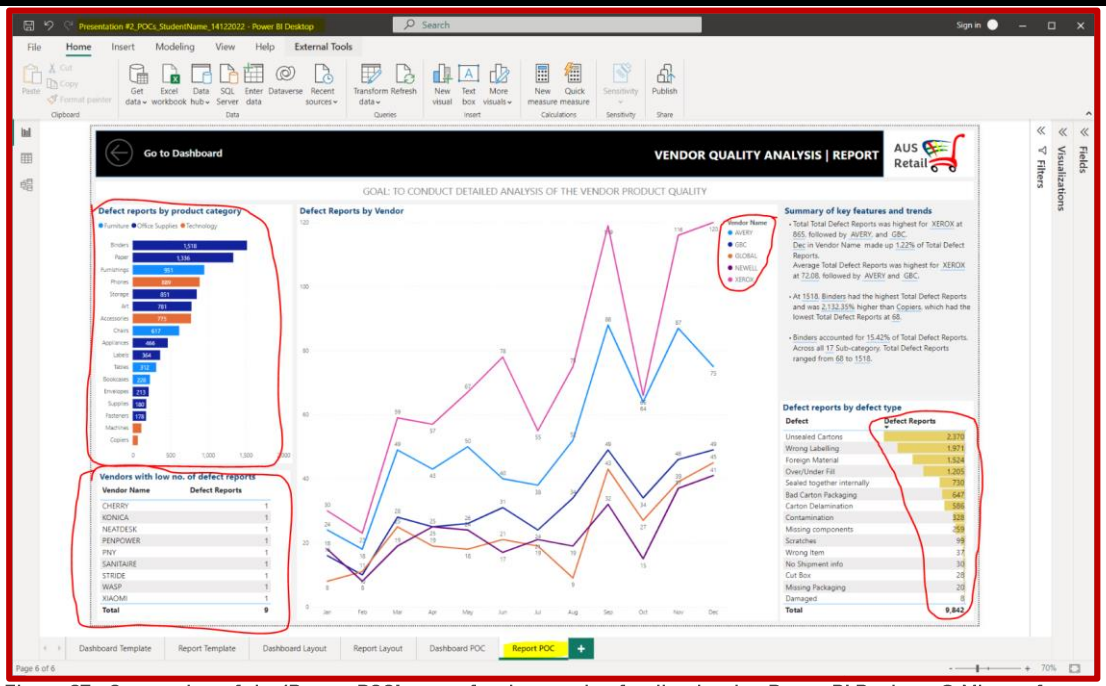
#	Task details	Tick/check ☒ once completed.
	Change the background colour of the required key figure visual to '#E8D166'	
2	Action **Feedback 2**, on the 'Report POC' page on the correct visual to display details of only the top 5 vendors.	☐
3	Action **Feedback 3**, on the 'Report POC' page by applying the appropriate conditional formatting to the 'Defect Reports' field. Use the positive bar colour as '#E8D166' and set the bar direction from 'Right to left'. Assessor instructions: The student must format the 'Defect Reports' values to display data bars with values: • Conditional formatting > Data bars > positive bar colour to '#E8D166'.	☐
4	Action **Feedback 4**, on the 'Report POC' page by: • adding a new table to display the requested information at the appropriate position on the report. • formatting the table to maintain consistency with the rest of the report visuals • applying the correct filter to only display the requested information.	☐

Screenshot evidence:

Assessor instructions: The screenshots must indicate similar modifications to what is displayed in the sample screenshots provided as evidence of integrating the feedback. The changes/modifications on each POC pages are circled in red for ease of identification.

Table 1 – Evidence of integrating feedback into 'Presentation #2' POCs

Required evidence:	Screenshot
Screenshot of the 'Dashboard POC' page after integrating feedback. **Note:** The screenshot must clearly show the following details: ☐ 'Report' view of the Power BI work file. ☐ Title bar of Power BI Desktop showing the file name that includes your name initials and current date. ☐ Full view of the 'Dashboard POC' page showing the integration of **Feedback 1.**	 Figure 26 – Screenshot of the 'Dashboard POC' page after integrating feedback using Power BI Desktop © Microsoft

Required evidence:	Screenshot
Screenshot of the 'Report POC' page after integrating feedback. **Note:** The screenshot must clearly show the following details: ☐ 'Report' view of the Power BI work file. ☐ Title bar of Power BI Desktop showing the file name that includes your name initials and current date. ☐ Full view of the 'Report POC' page showing **Feedback 2, 3 and 4** integrated.	 Figure 27 – Screenshot of the 'Report POC' page after integrating feedback using Power BI Desktop © Microsoft

Files for submission

Create a new folder in your local computer with your name details called 'BSBXBD406_04_Firstname_Lastname'. (e.g. BSBXBD406_04_John_Smith). Save the final versions of the two (2) Power BI work files after completing all tasks in Parts B to E of this assessment within the 'BSBXBD406_04_Firstname_Lastname' folder as follows with your name details and current date.

- Presentation #1_POCs_YourName_ddmmyyyy (.pbix file)
- Presentation #2_POCs_YourName_ddmmyyyy (.pbix file)

Before submitting the 'BSBXBD406_04_Firstname_Lastname' containing the Power BI work files, convert this folder to a zipped file. See details under 'Submission Instructions' > 'Zipped File Submissions' of this assessment.

Assessment checklist:

Students must have completed all activities within this assessment before submitting. This includes:

Part B: Create proof of concepts (POCs) for 'Presentation #1'		
B1	Table 1- Evidence of creating proof of concepts for 'Presentation #1' (**Two** screenshots provided)	☐
B2	Screenshot provided as evidence of creating the interactive dashboard POC for 'Presentation #1'	☐
B3	Screenshot provided as evidence of creating a report tooltip page for 'Presentation #1'	☐
B4	Screenshot provided as evidence of creating a drill-through report for 'Presentation #1'	☐
B5	Table 5 – Completed checklist for testing the POCs for 'Presentation #1' Table 6 - Evidence of tested proof of concepts for 'Presentation #1' (**Two** screenshots provided)	☐
B6	Table 7 –Evidence of tested proof of concepts for 'Presentation #1' according to context and intended audience. (**Two** screenshots provided)	☐
Part C: Create proof of concepts (POCs) for 'Presentation #2'		
C1	Table 8- Evidence of creating proof of concepts for 'Presentation #2' (**Two** screenshots provided)	☐

C2	Screenshot provided as evidence of creating the interactive dashboard POC for 'Presentation #2'	☐
C3	Screenshot provided as evidence of creating an analysis report for 'Presentation #2'	☐
C4	Table 11 – Completed checklist for testing the POCs for 'Presentation #2' Table 12 - Evidence of tested proof of concepts for 'Presentation #2' [**Two** screenshots provided]	☐
C5	Table 13 –Evidence of tested proof of concepts for 'Presentation #2' according to context and intended audience. [**Two** screenshots provided]	☐
Part D: Seek feedback from required stakeholders		
D1	Email to stakeholder/s – email draft including POC design feedback form with screenshots of 'Presentation #1' POCs.	☐
D2	Email to stakeholder/s – email draft including POC design feedback form with screenshots of 'Presentation #2' POCs.	☐
Part E: Integrate feedback into big data presentation		
E1	Table 15 - Evidence of integrating feedback into 'Presentation #1' POCs [**Two** screenshots provided]	☐
E2	Table 17 - Evidence of integrating feedback into 'Presentation #2' POCs [Two screenshots provided]	☐

Congratulations you have reached the end of Assessment [4]!

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References:

Learning Container. 2020. *Sample sales data excel xls.* [online] Available at: https://www.learningcontainer.com/download/sample-sales-data-excel-xls/ [Accessed 04 April 2022].