DIAH Demo Instructions

## **Prerequisites**

* You must be connected to the internet
* Download a copy of the demo assets locally
* Install Power BI Desktop
* Sign up for <https://app.powerbi.com>
* Create VanArsdel Performance dashboard by following DIAH instructions

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| **Pre Demo** | |
| 1. Open VanArsdel Performance.pbix file 2. Open Data.xlsx 3. Sign into <https://app.powerbi.com> and navigate to VanArsdel Performance dashboard |  |
| **Lab Data** | |
| 1. Navigate to Data.xlsx window (opened in Step 2) 2. VanArsdel, manufactures expensive electronic products that could be used for fun as well as work and it sells them directly to consumers in three major markets. 3. VanArsdel and its competitors have retained a 3rd party marketing company to collect and anonymize industry sales so that all participants can benchmark themselves. 4. Sales data along with details of Product, Date and Geography are available in an Excel workbook. Data from these sources need to be brought together to analyze and report on |  |
| **Power BI Desktop** | |
| 1. Launch new instance of Power BI Desktop 2. Once Power BI Desktop opens, startup screen opens as well 3. Close startup screen by clicking on “x” on the top right corner |  |
| The **Report** view has five main areas:   1. The ribbon, which displays common tasks associated with reports and visualizations 2. The **Report** view, or canvas, where visualizations are created and arranged 3. The **Pages** tab area along the bottom, which lets you select or add a report page 4. The **Visualizations** pane, where you can change visualizations, customize colors or axes, apply filters, drag fields, and more   The **Fields** pane, where query elements and filters can be dragged onto the **Report** view, or dragged to the **Filters** area of the **Visualizations** pane |  |
| 1. This opens Power BI Desktop 2. Notice in the ribbon under Home, there are following categorization    * Clipboard    * External Data: This section is equivalent to Power Query for Excel. It is used to connect to various data sources and transform data    * Insert: Used to create elements in the report. Similar to Power View for Excel    * View: This section is used to customize Page View    * Relationships: This section is used to create/edit relationships in the data model. It’s similar to Power Pivot for Excel    * Calculations: This section is used to create/edit measures and calculated columns. It’s similar to Power Pivot for Excel    * Share: This is used to Publish data model to Power BI Service 3. Notice on the left panel, there is reports, data and relationship sections. These views provide capability to view data and relationships between tables 4. The center panel is the canvas used to create visuals or view data 5. Right panel is used to add/edit report elements 6. Also notice the Modeling ribbon option, that provides option to Add Columns, Add Measures and other modeling options |  |
| 1. From the ribbon select Home -> Get Data -> More… 2. Talk about the variety of sources that are supported  * File * Database * Azure * Other |  |
| 1. Switch to VanArsdel Performance.pbix window (opened in Pre-Demo step 1) 2. Click on Home -> Edit Queries to open Query Editor 3. 4 queries are created from the 4 worksheets in Excel source 4. There are data preparation and transformation options  * Add/Delete Columns and Rows * Change Data Type * Merge Queries * Append Queries  1. Talk about APPLIED STEPS 2. Close Query Editor window |  |
| 1. Navigate back to Page 1 of VanArsdel Performance.pbix 2. Report is used to analyze performance of Manufacturers by year 3. Talk about the different visualization charts 4. In the Donut chart click on Moderation segment 5. Notice in Revenue by Manufacturer treemap, Moderation forms a huge percent of VanArsdel’s sales 6. Also notice in the Column and Line chart, VanArsdel sales is a big player. Its sales is a high percent of the sales each month 7. Click on Moderation in Donut chart to remove the slicer |  |
| 1. Notice that Sales in Jan and Feb is low compared to other months for the year 2017 2. In the Year slicer, change the filter to 2016 3. Notice sales in Jan and Feb is low in 2016 as well. 4. Looks like Sales is low during the first couple of months every year |  |
| 1. Select the new matrix visual on the bottom right corner 2. Click on the arrow next to Revenue in the Values section 3. Talk about the bar and color scale conditional formatting options available |  |
| 1. Navigate to Page 2 2. Hover over Sales Variance by State column chart 3. Click on the down arrow icon on the top right corner to enable drill functionality 4. Click on TX column and notice it displays Sales Revenue by City for all Texas states 5. Click back up to the State level and talk about Drill to next level capability |  |
| 1. From the ribbon select View 2. Click on the check boxes next to Show Gridlines and Snap objects to grid 3. Talk about the ease with which visuals can be aligned using these features 4. Talk about the ability to change Layout to be compatible with phones |  |
| 1. Talk about ability to publish the report to Power BI Service 2. Navigate to the browser where <https://app.powerbi.com> is open (Step 3) 3. Talk about the 3 main sections in Power BI Service  * Dashboards * Reports * Datasets  1. Talk about Favorites, Recent, Workspaces |  |
| Power BI service workspace is made up of:   1. navigation bar 2. dashboard with tiles 3. Q&A question box 4. help and feedback buttons 5. dashboard title 6. Office 365 app launcher 7. Power BI home buttons 8. Additional dashboard actions |  |
| 1. Navigate to Power BI Service 2. Talk about how the tiles have been created from the reports 3. Talk about how clicking on dashboard tile navigates to the respective report page 4. Click Sales KPI tile |  |
| 1. In Performance Overview report, notice the Waterfall Chart Sales for VanArsdel is down 2. Also, notice in the column chart Sales for TX and CA are down 3. From the Year slicer, select 2016 4. Notice 2016 performance was much better across all states, manufacturers and products |  |
| 1. Click on the column chart on the top right 2. From the menu select Explore 3. Talk about drill functionality, See Data, See Records |  |
| 1. Navigate back to VanArsdel Performance dashboard 2. Click on Revenue tile (11.33 M tile) 3. It will navigate to Q&A 4. Talk about Q&A feature |  |
| 1. Navigate back to VanArsdel Performance dashboard 2. Talk about the Share dashboard feature 3. Also talk about the features available to duplicate, print, refresh and set featured dashboard. 4. Talk about the ability to view Favorites and Recent dashboards |  |
| 1. Hover over Revenue tile and click on the **ellipse** on the top right corner. 2. Talk about the various options available. E.g Alerts, Insights, In Focus mode, etc |  |
| 1. Open VanArsdel Performance dashboard using a mobile app and show the features available on the Apps |  |