2. Power BI – Creating Charts

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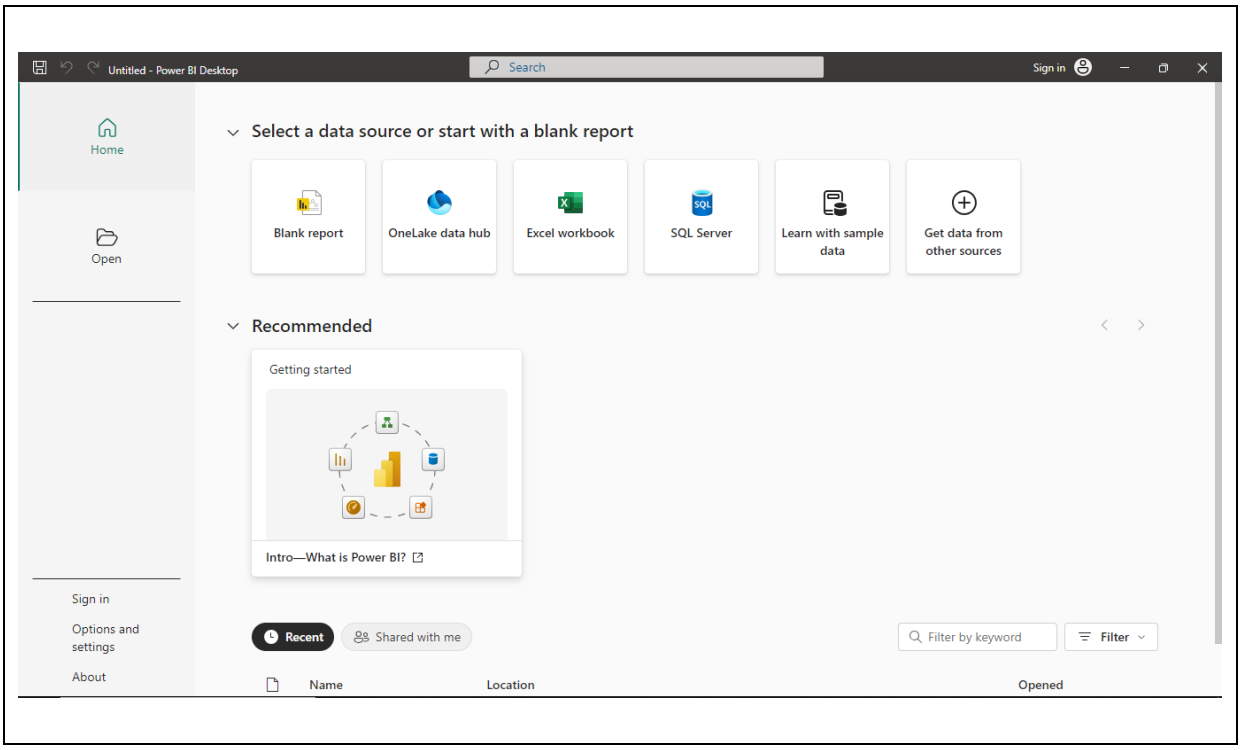
2. Power BI – Creating Charts

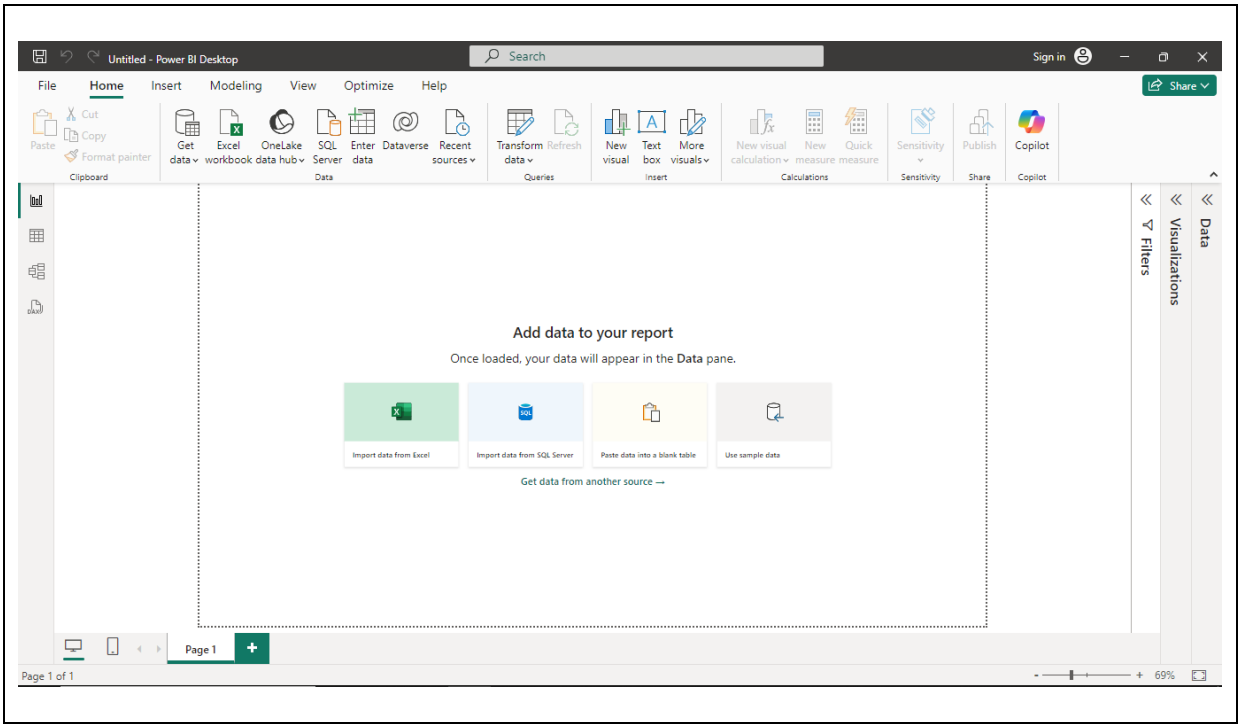
1. Column Chart

- ✓ A **Column Chart** in Power BI is a visual representation of data using vertical bars to show values for different categories.
- ✓ It is one of the most commonly used charts.
- ✓ By using this we can compare the quantities across categories or tracking changes over time.

1.1. Initial steps

- ✓ Open Power BI Desktop.
- ✓ Click on blank report.
- ✓ Import your dataset by clicking **Home** > **Get Data** and selecting the file type (Excel, CSV, database, etc.).
- ✓ Ensure your data loaded.




Untitled - Power BI Desktop
Search
Sign in
File
Home
Insert
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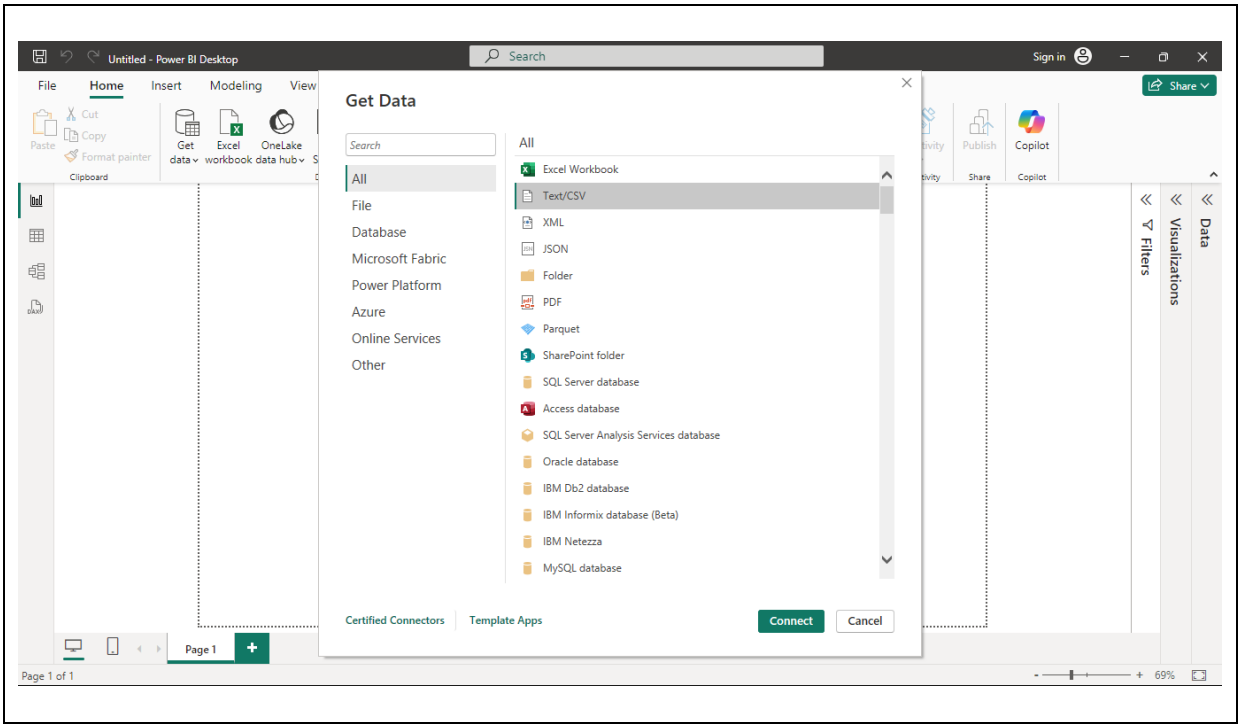
Optimize
Help
Share
Add data to your report
Once loaded, your data will appear in the Data pane.
Import data from Excel
Import data from SQL Server
Paste data into a blank table
Use sample data
Get data from another source →
Page 1
Page 1 of 1
69%
Filters
Visualizations
Data


Untitled - Power BI Desktop
Search
Sign in
Get Data
Search
All
File
Database
Microsoft Fabric
Power Platform
Azure
Online Services
Other
Excel Workbook
Text/CSV
XML
JSON
Folder
PDF
Parquet
SharePoint folder
SQL Server database
Access database
SQL Server Analysis Services database
Oracle database
IBM Db2 database
IBM Informix database (Beta)
IBM Netezza
MySQL database
Certified Connectors
Template Apps
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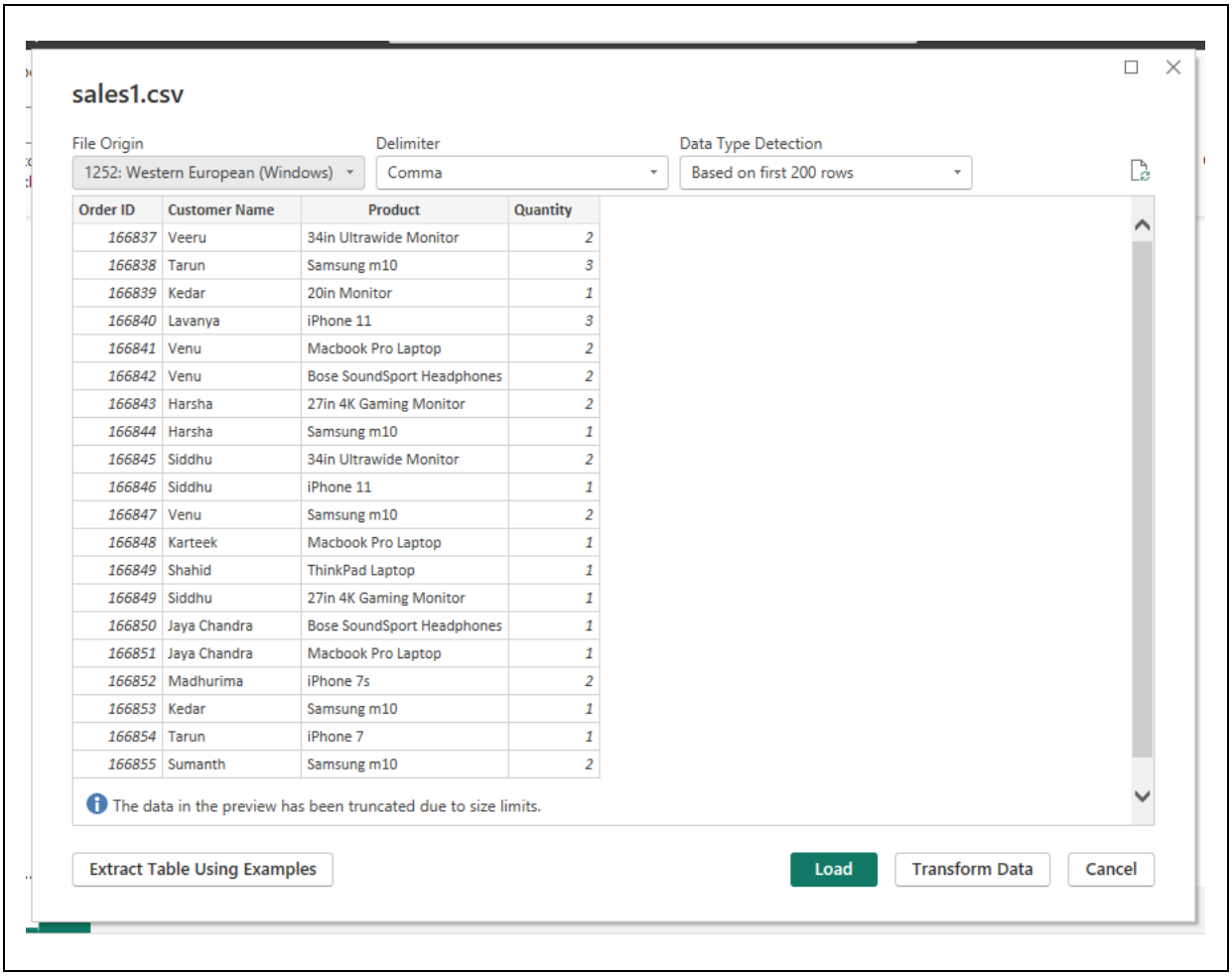
Page 1
Page 1 of 1
69%


sales1.csv
File Origin
1252: Western European (Windows)
Delimiter
Comma
Data Type Detection
Based on first 200 rows
Order ID | Customer Name | Product | Quantity
166837 | Veeru | 34in Ultrawide Monitor | 2
166838 | Tarun | Samsung m10 | 3
166839 | Kedar | 20in Monitor | 1
166840 | Lavanya | iPhone 11 | 3
166841 | Venu | Macbook Pro Laptop | 2
166842 | Venu | Bose SoundSport Headphones | 2
166843 | Harsha | 27in 4K Gaming Monitor | 2
166844 | Harsha | Samsung m10 | 1
166845 | Siddhu | 34in Ultrawide Monitor | 2
166846 | Siddhu | iPhone 11 | 1
166847 | Venu | Samsung m10 | 2
166848 | Karteek | Macbook Pro Laptop | 1
166849 | Shahid | ThinkPad Laptop | 1
166849 | Siddhu | 27in 4K Gaming Monitor | 1
166850 | Jaya Chandra | Bose SoundSport Headphones | 1
166851 | Jaya Chandra | Macbook Pro Laptop | 1
166852 | Madhurima | iPhone 7s | 2
166853 | Kedar | Samsung m10 | 1
166854 | Tarun | iPhone 7 | 1
166855 | Sumanth | Samsung m10 | 2
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Extract Table Using Examples
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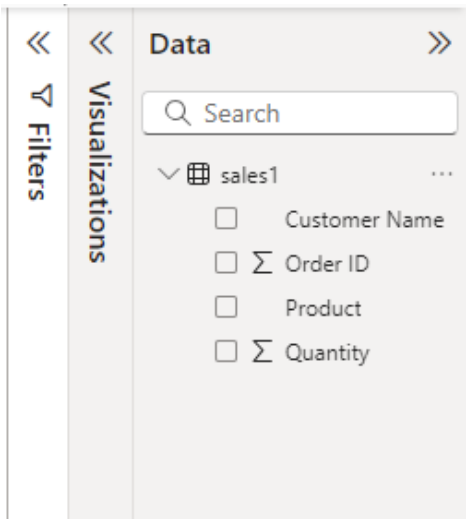
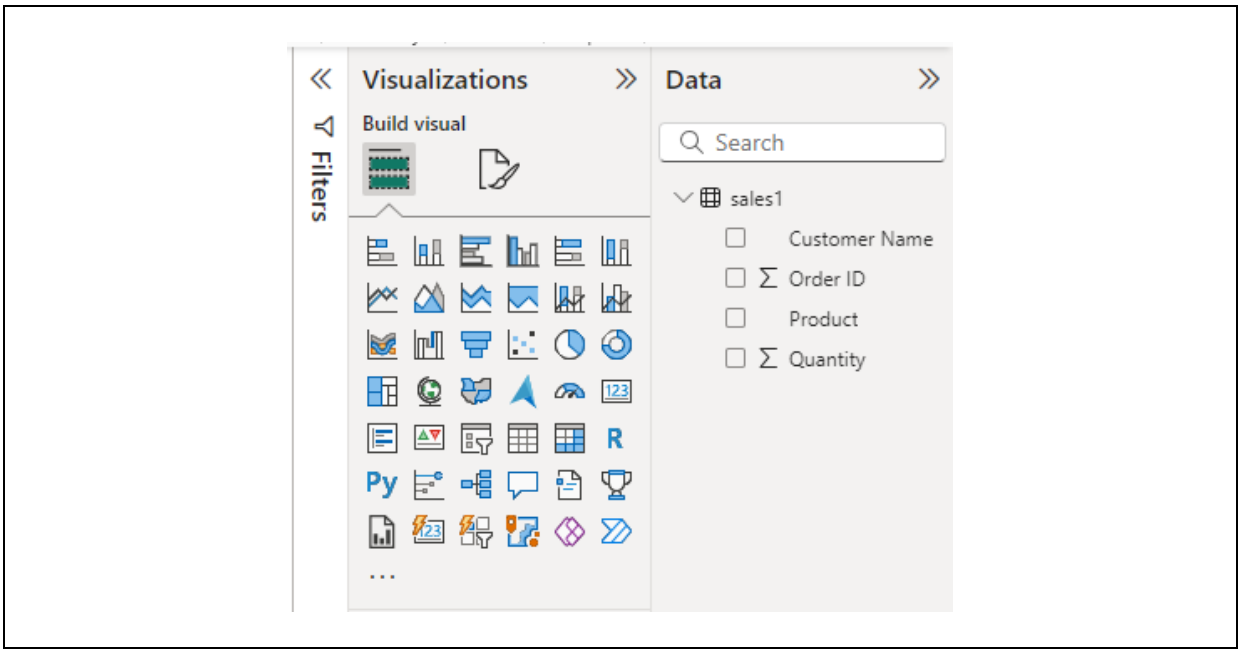
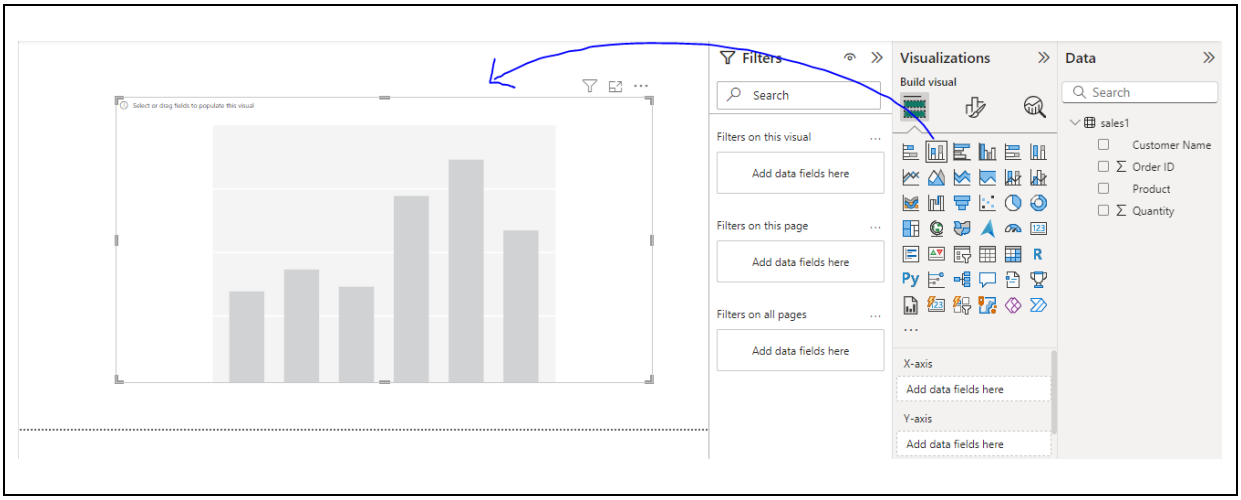
Transform Data
Cancel

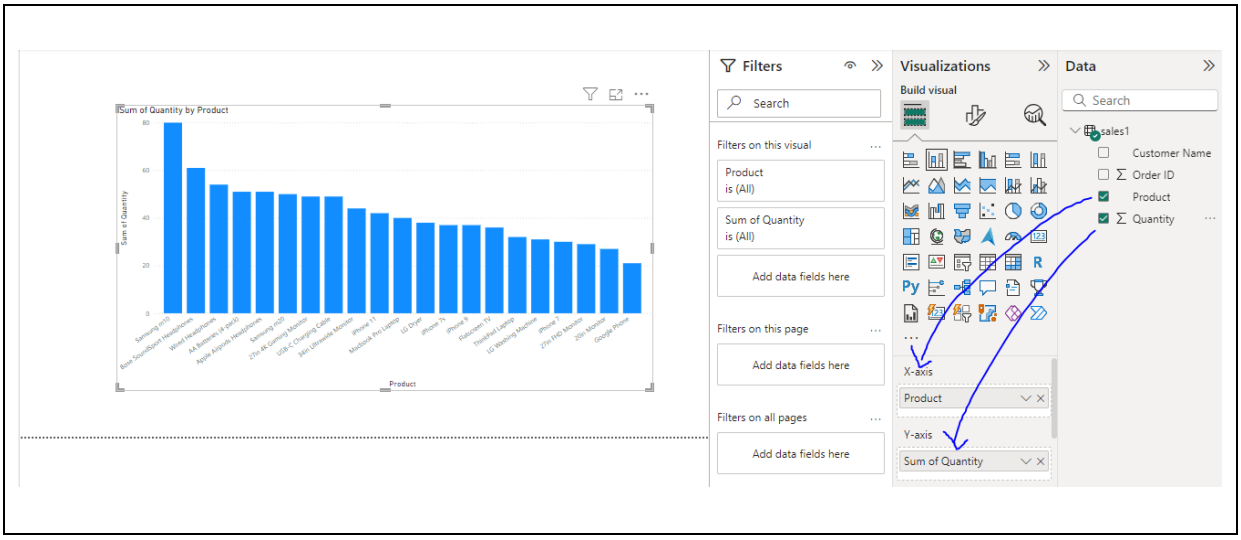

Filters
Visualizations
Data
Search
sales1
Customer Name
Order ID
Product
Quantity

1.2. Steps to create column chart

- ✓ Open Power BI Desktop.
- ✓ Load the data: **sales1.csv**
- ✓ Select the Column Chart from the Visualizations pane.
- ✓ Drag fields to:
  - X Axis: product
  - Y Axis: quantity
  - Legend: The subcategory (if having)
- ✓ Customize using the Format Visual pane to adjust colors, labels, and axis titles.






Sum of Quantity by Product
Sum of Quantity
Product
Filters
Search
Filters on this visual
Product
is (All)
Sum of Quantity
is (All)
Add data fields here
Filters on this page
Add data fields here
Filters on all pages
Add data fields here
Visualizations
Build visual
X-axis
Product
Y-axis
Sum of Quantity
Data
Search
sales1
Customer Name
Order ID
Product
Quantity

More options

- ✓ Format your visual
- ✓ **Visual**
  - X-axis
    - Values -> On or off
      - Font
      - Colors
    - Title -> On or off
      - Title Text
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      - Font
      - Color
    - Layout
      - Width
  - Y-axis
    - Range(optional)
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      - Colors
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      - Top to centre
      - Lot of other options too
    - Text
      - Font
      - Color
    - Title -> On or off

- Title Text

  - Data labels **->** On or off
  - Total labels **->** On or off

✓ **General**

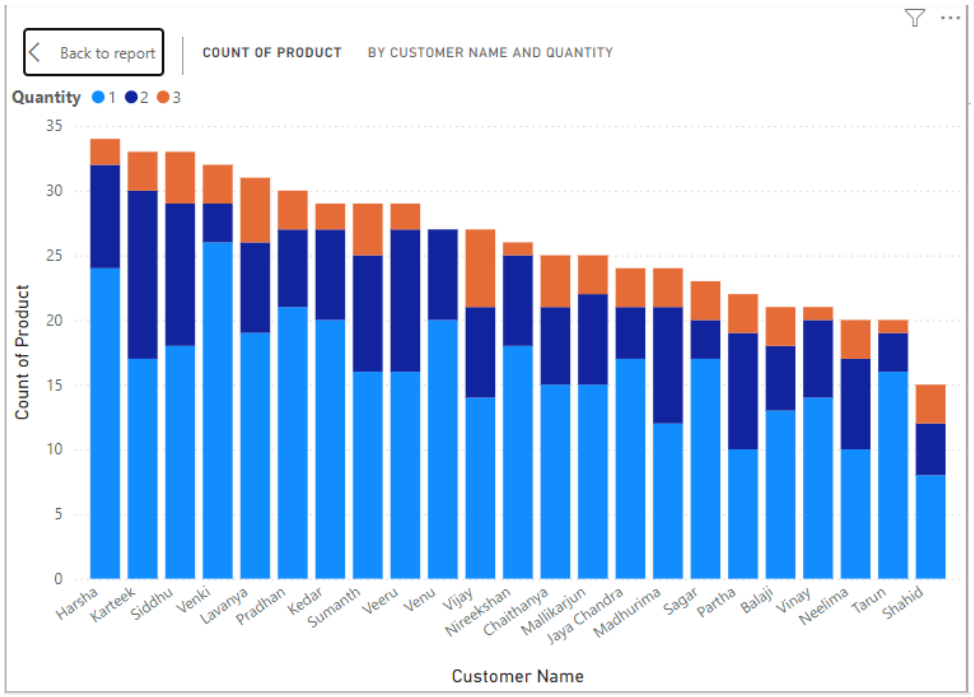
  - Title **->** On or off

2. Stacked Column Chart

- ✓ A **Stacked Column Chart** in Power BI is a variation of the column chart where the values for each category are represented as **stacked segments** on a single vertical bar.
- ✓ Each segment of the bar represents a **subcategory's contribution** to the total value of that category.
- ✓ In the column chart, data values are displayed side-by-side, whereas they are stacked one over the other in the stacked chart.

2.1. Steps to create stacked column chart

- ✓ Open Power BI Desktop.
- ✓ Load the data: **sales1.csv**
- ✓ Select the Stacked Column Chart from the Visualizations pane.
- ✓ Drag fields to:
  - X Axis: product
  - Y Axis: quantity
  - Legend: The subcategory (if having)
- ✓ Customize using the Format Visual pane to adjust colors, labels, and axis titles.



More options

- ✓ Format your visual
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      - Width
  - Y-axis
    - Range(optional)
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      - Font
      - Colors
      - Display units
    - Title -> On or off
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      - Style
      - Font
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      - Lot of other options too
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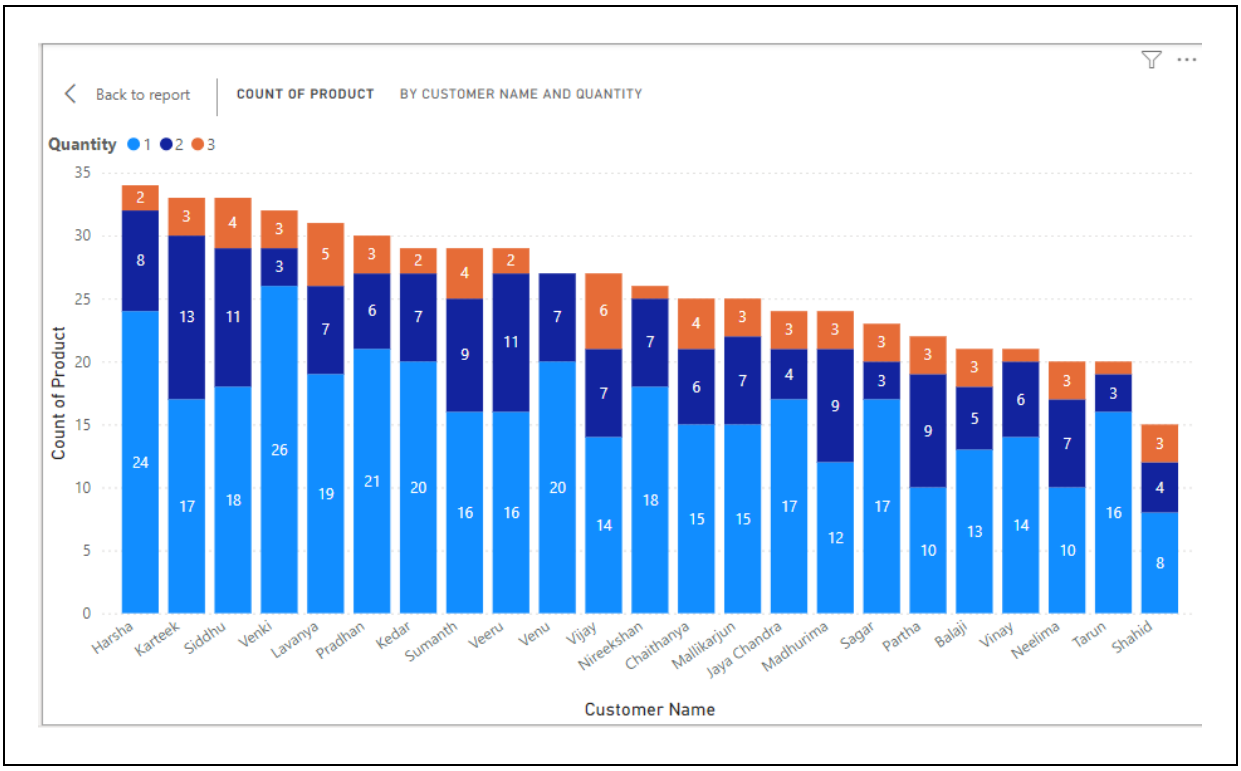
- Title -> On or off
  - Title Text

- Data labels -> On or off
- Total labels -> On or off

✓ **General**

- Title -> On or off

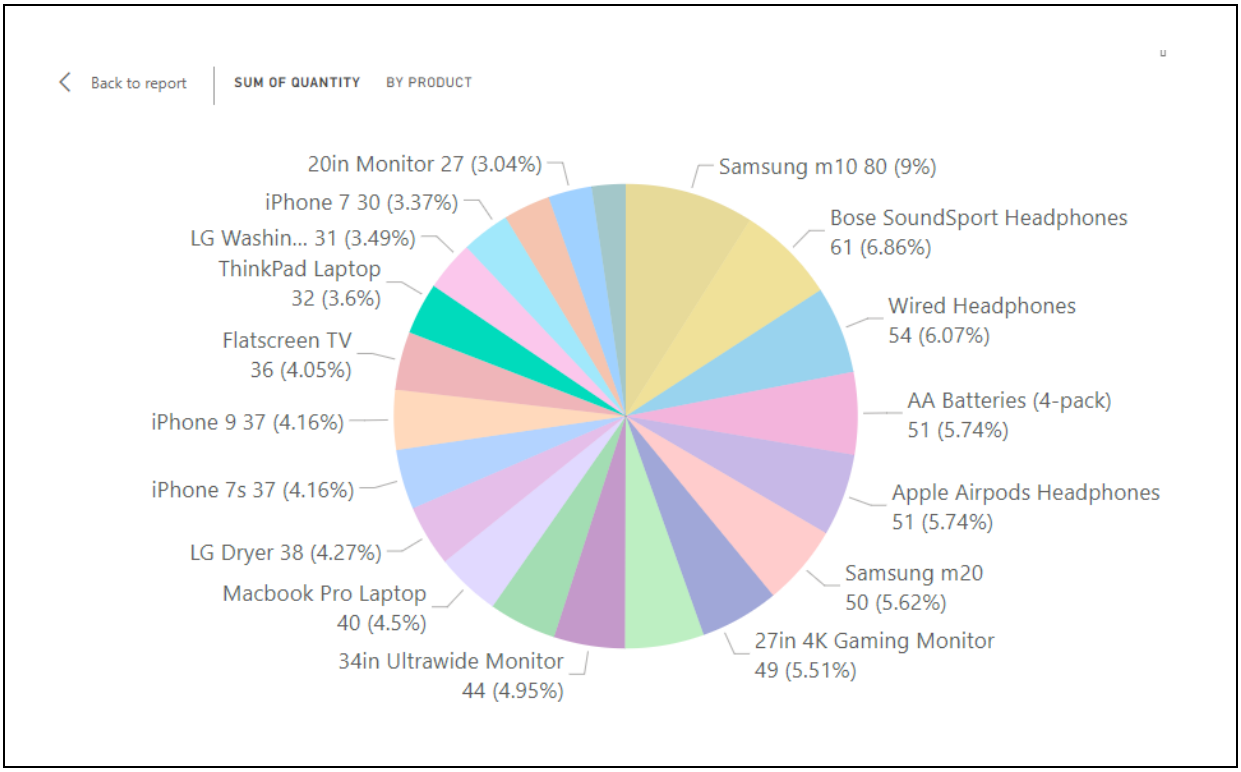


3. Pie Chart

- ✓ A pie chart in Power BI is a visual representation used to show the proportions or percentages of a whole data.
- ✓ It is shaped like a circle divided into slices.
- ✓ Each slice represents a category corresponds to its value compared to the total.
- ✓ For example, to see the total sales split by product.

3.1. Steps to create stacked column chart

- ✓ Open Power BI Desktop.
- ✓ Load the data: **sales1.csv**
- ✓ Select the Pie chart from the Visualizations pane.
- ✓ Drag fields to:
  - Legend: product
  - Values: quantity
- ✓ Customize using the Format Visual pane to adjust colors, labels



More options

- ✓ Format your visual
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  - Legend -> On or off
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      - Lot of other options too
    - Text
      - Font
      - Color
    - Title -> On or off
      - Title Text
  - Slices
    - Colors

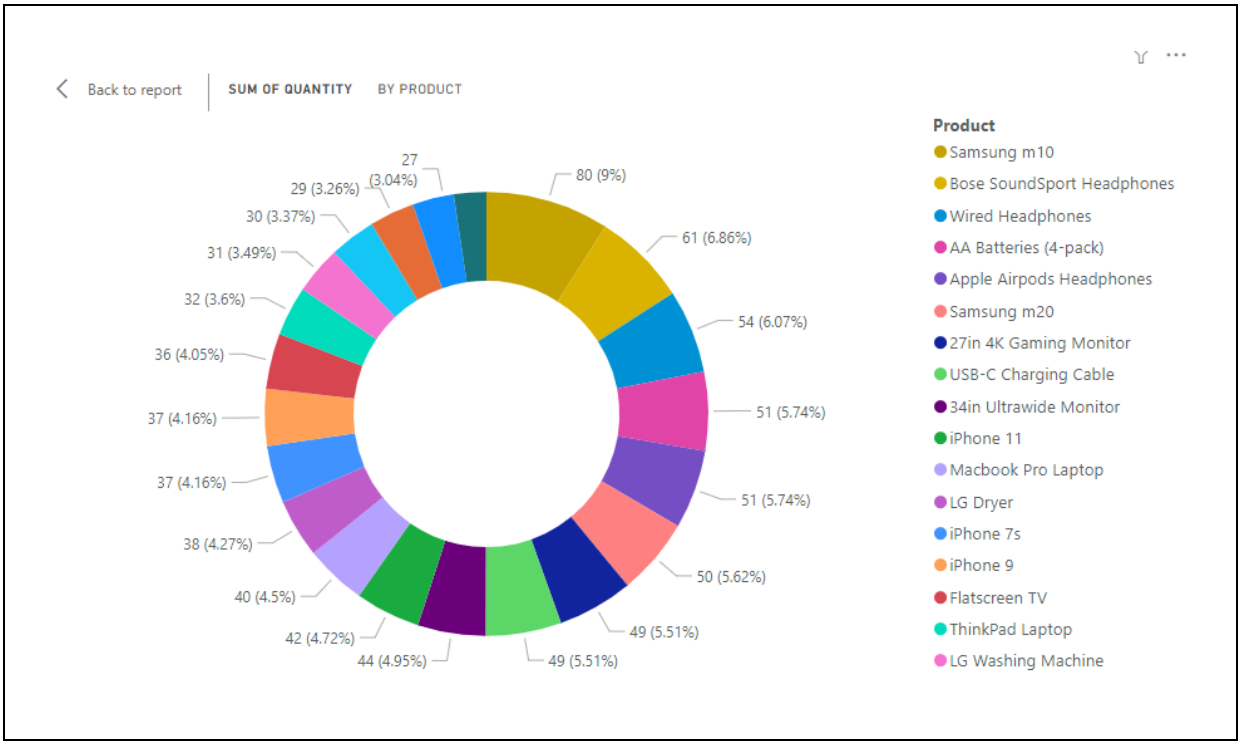
- ✓ Detail labels -> On or off
  - Options
    - Position
      - Outside
      - Inside
      - Prefer outside
      - Prefer inside
    - Label contents
      - Category
      - Data values
      - Percent of values
      - Category, Data values
      - Category, Percent of values
      - Data values, Percent of values
      - All detail labels
  - Values
    - Font
    - Color
    - Background

4. Donut Chart

- ✓ A donut chart is a circular chart, which could present values of a dataset in the form of slices of a donut.
- ✓ The donut chart is exactly the same as a pie chart.
- ✓ The only difference is pie chart has a circle, but a donut chart is in donut shape.

4.1. Steps to create stacked column chart

- ✓ Open Power BI Desktop.
- ✓ Load the data: **sales1.csv**
- ✓ Select the Donut chart from the Visualizations pane.
- ✓ Drag fields to:
  - Legend: product
  - Values: quantity
- ✓ Customize using the Format Visual pane to adjust colors, labels



More options

- ✓ Format your visual
- ✓ Visual
  - Legend -> On or off
    - Options
      - Top left
      - Top to centre
      - Lot of other options too
    - Text
      - Font
      - Color
    - Title -> On or off
      - Title Text
  - Slices
    - Colors

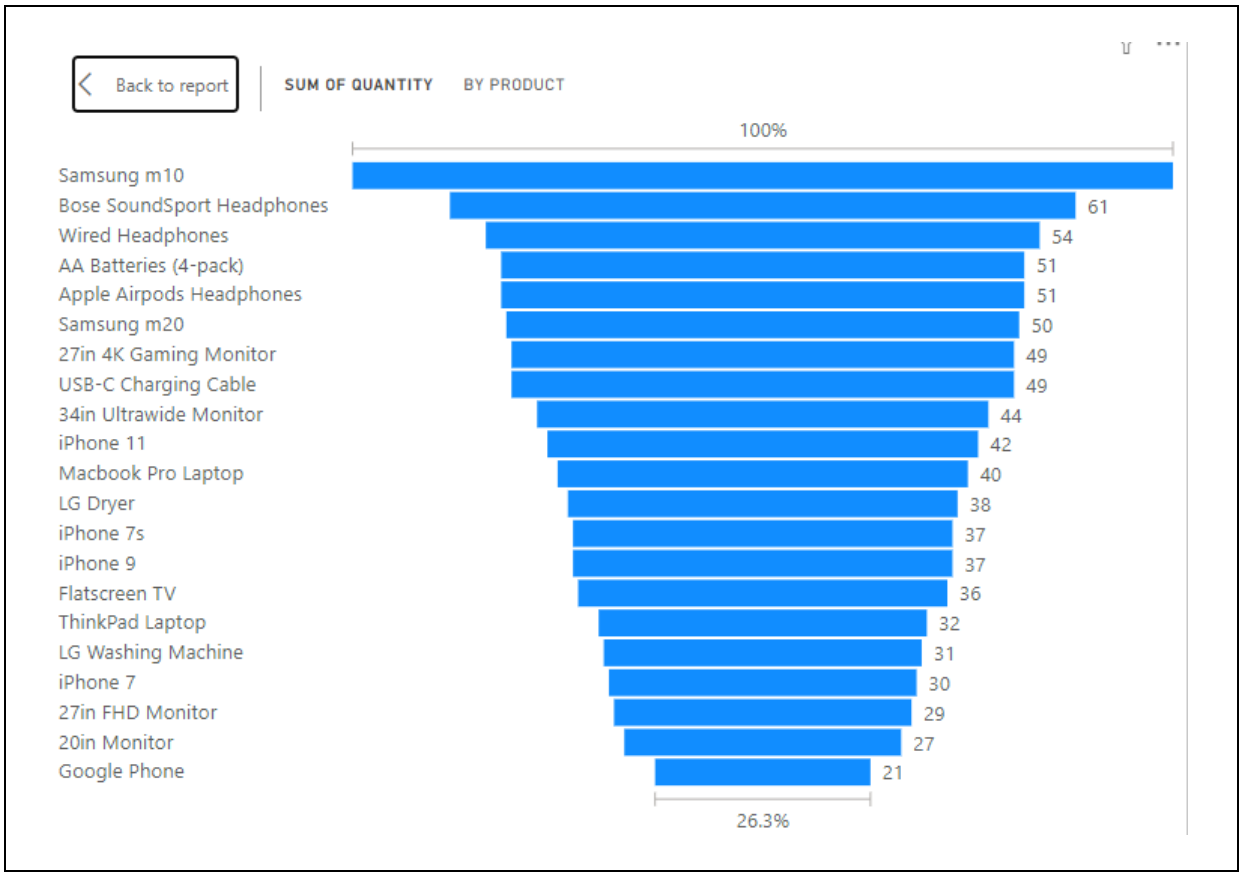
- ✓ Detail labels -> On or off
  - Options
    - Position
      - Outside
      - Inside
      - Prefer outside
      - Prefer inside
    - Label contents
      - Category
      - Data values
      - Percent of values
      - Category, Data values
      - Category, Percent of values
      - Data values, Percent of values
      - All detail labels
  - Values
    - Font
    - Color
    - Background

5. Funnel Chart

- ✓ A Funnel Chart in Power BI is a visual representation used to show data across stages in a process.
- ✓ It is particularly useful for visualizing workflows, sales pipelines, or any process that involves sequential stages.

5.1. Steps to create Funnel chart

- ✓ Open Power BI Desktop.
- ✓ Load the data: **sales1.csv**
- ✓ Select the Funnel chart from the Visualizations pane.
- ✓ Drag fields to:
  - Category: product
  - Values: quantity
- ✓ Customize using the Format Visual pane to adjust colors, labels



More options

- ✓ Colors
  - Default
  - Show all -> On or off

- ✓ Data labels -> On or off
  - Options
    - Position
    - Label contents
      - Data value
      - Percent of first
      - Percent of previous
      - Data value, percent of value
      - Data value, percent of previous
  - Values
    - Font Size
    - Color
    - Display units
    - Value decimal places
    - Percentage decimal places
  - Background
    - Color
    - Transparency

- ✓ Category labels -> On or off
  - Values
    - Font
    - Color

- ✓ Conversion labels -> On or off
  - Values
    - Font
    - Color

6. Include and Exclude

- ✓ In Power BI, Include and Exclude are sensitive filtering options.
- ✓ By using this we can refine and customize data visualizations by dynamically adding or removing data points.

Include

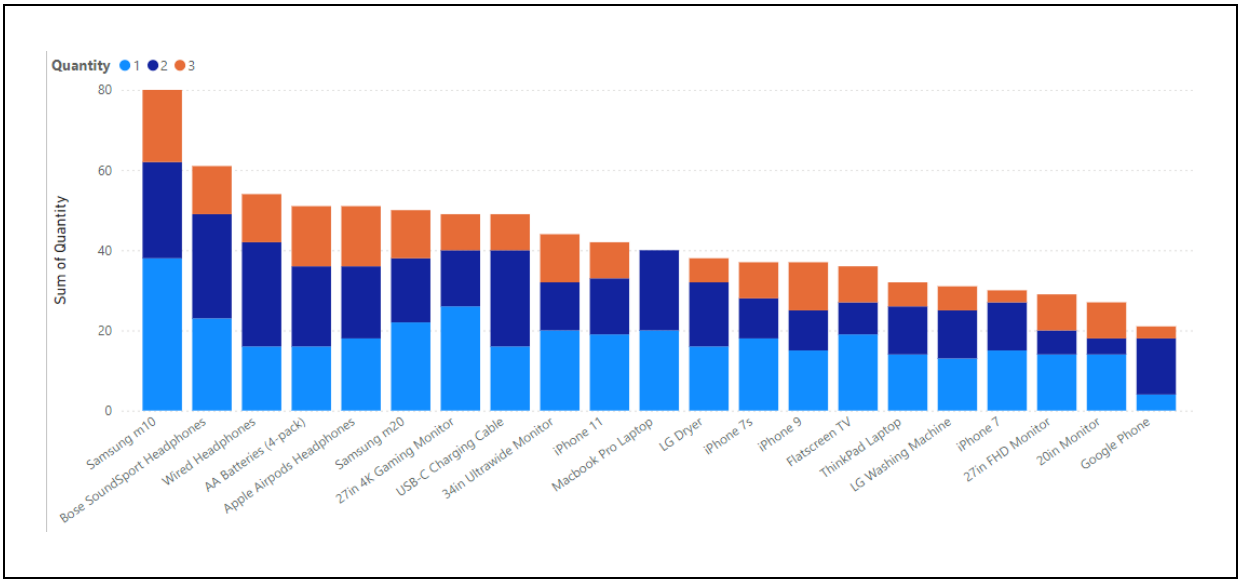
- ✓ Displays only the selected data points in a visual, helping focus on specific items.

Exclude

- ✓ Removes the selected data points from a visual, hiding irrelevant or unwanted items.

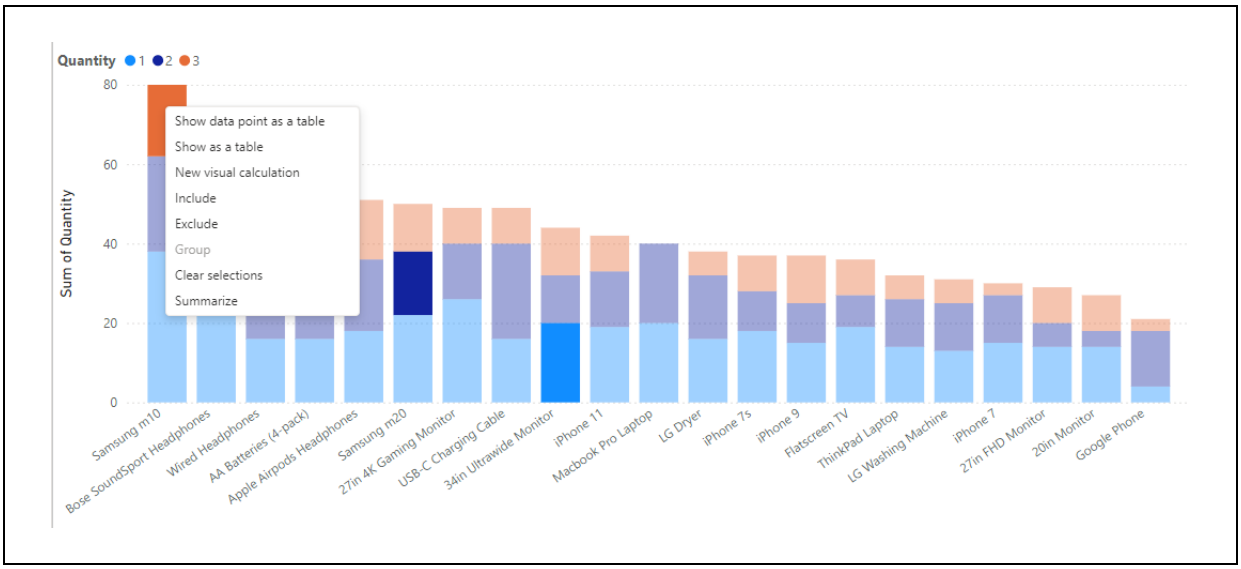
6.1. Steps to create stacked column chart

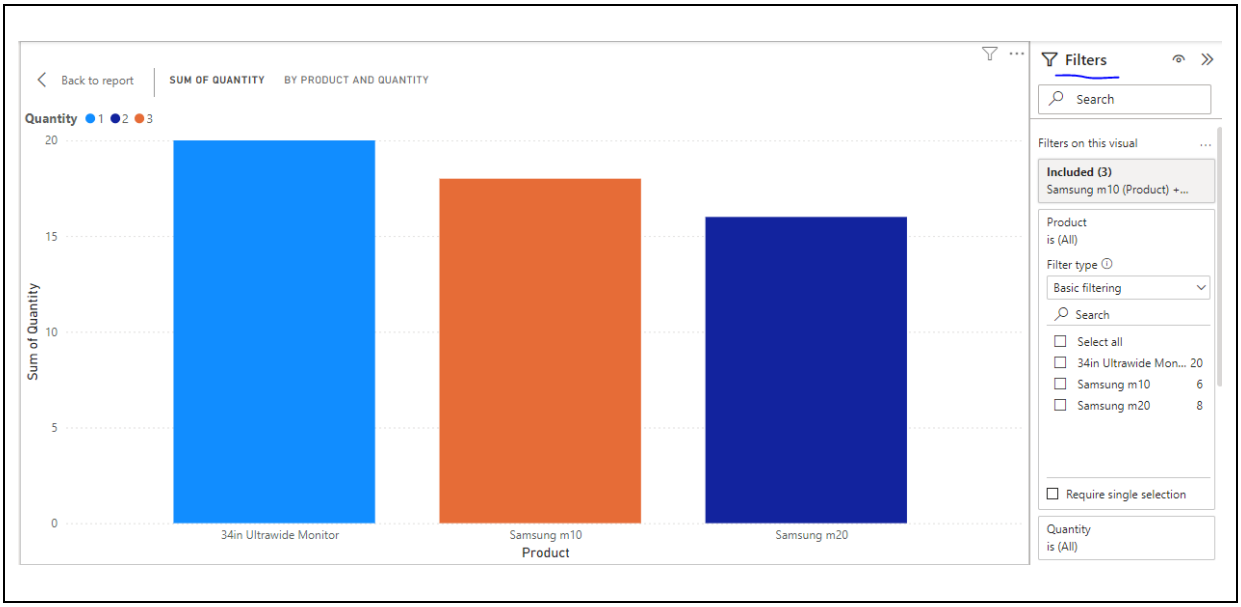
- ✓ Open Power BI Desktop.
- ✓ Load the data: **sales1.csv**
- ✓ Select the Stacked Column Chart from the Visualizations pane.
- ✓ Drag fields to:
  - X Axis: product
  - Y Axis: quantity
- ✓ Customize using the Format Visual pane to adjust colors, labels, and axis titles.



Include

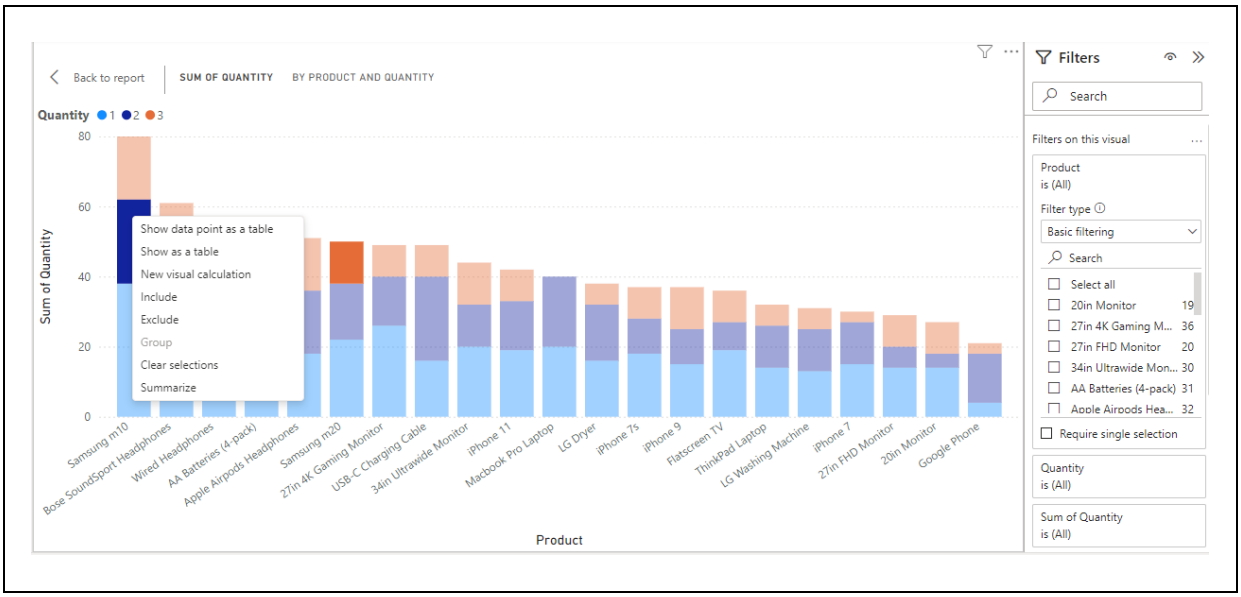
- ✓ Displays only the selected data points in a visual, helping focus on specific items.
- ✓ Select items (using control) to include and compare each other.
- ✓ Give right click and select include option.
- ✓ To delete the include option items, select Filter panel and click on x(close) button

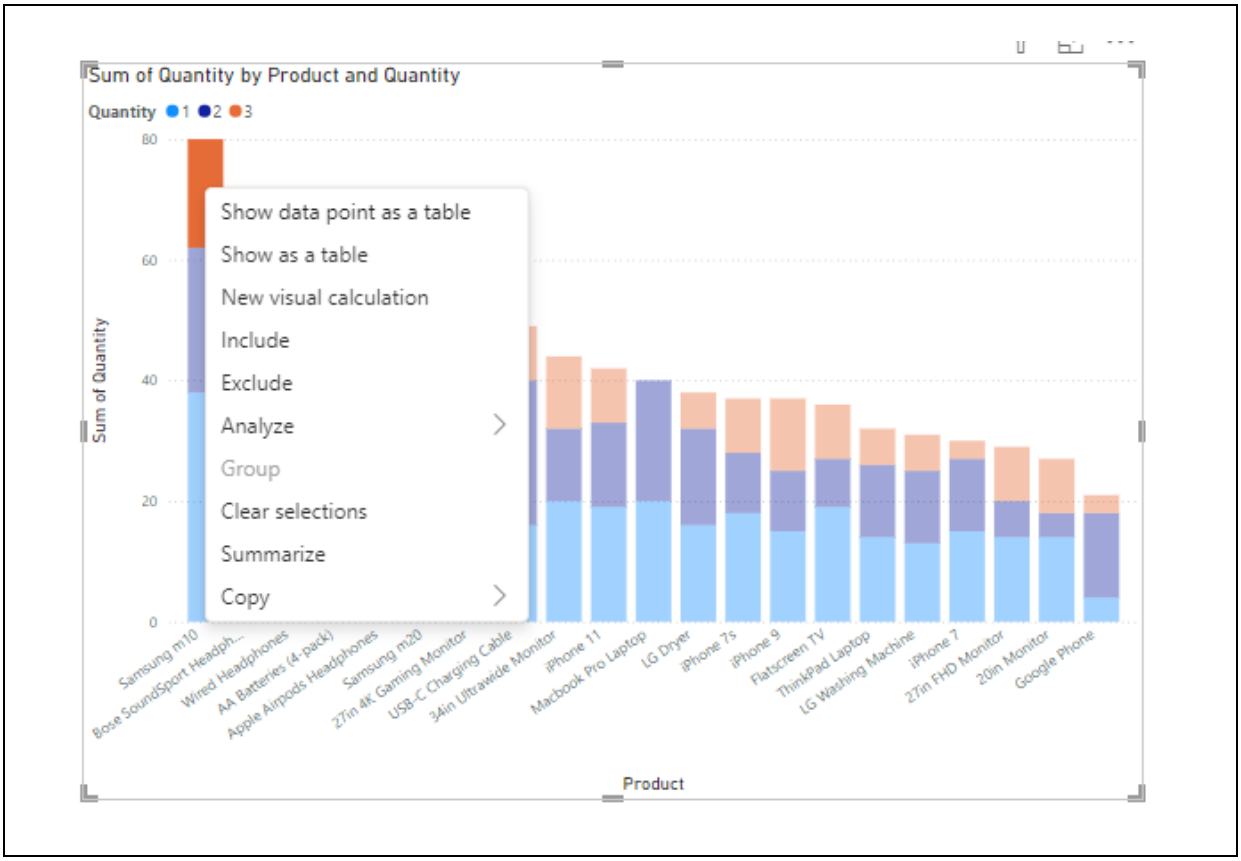
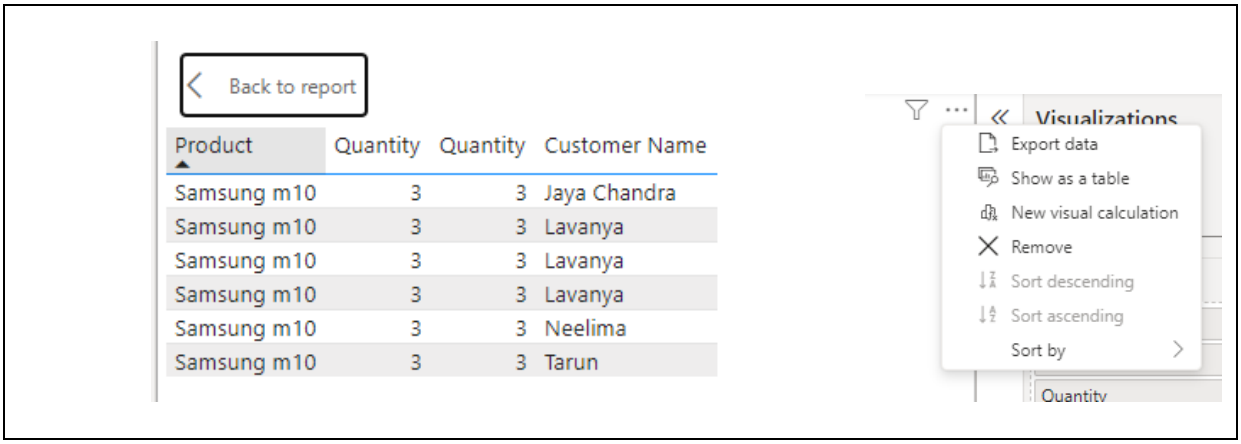




Exclude

- ✓ Removes the selected data points from a visual, hiding irrelevant or unwanted items.
- ✓ Select items (using control) to exclude and compare others.
- ✓ Give right click and select exclude option.
- ✓ To delete the exclude option items, select Filter panel and click on x(close) button.



7. View Data and Export in CSV from Power BI

- ✓ We can View Data and Export in CSV from Power BI.
- ✓ After exporting we can do further analysis.