

Lab Exercise 1: Viewing Reports

Scenario

You have been asked to compare Excel Services in SharePoint with Power BI Desktop and Power BI Service to see which offers the best self-service BI solution. You will share an Excel file on SharePoint to determine how user friendly this experience is.

The main tasks for this exercise are as follows:

1. Prepare the Lab Environment
2. View Reports in SharePoint Server

Task 1: Prepare the Lab Environment

1. Ensure that the 20778A-MIA-DC, 20778A-MIA-SQL, and MSL-TMG1 virtual machines are running, and then log on to 20778A-MIA-SQL as ADVENTUREWORKS\Student with the password Pa\$\$w0rd.
2. Run Setup.cmd in the D:\Labfiles\Lab01\Starter folder as Administrator.
3. If you do not already have a Power BI login, browse to <https://powerbi.microsoft.com/en-us/documentation/powerbi-admin-signing-up-for-power-bi-with-a-new-office-365-trial>, and follow the steps to create an account.
4. Download and install Microsoft Power BI Desktop from <https://www.microsoft.com/en-us/download/details.aspx?id=45331> using the default options.

Task 2: View Reports in SharePoint Server

1. Open the Adventure Works Sales.xlsx file from the D:\Labfiles\Lab01\Starter\Project folder.
2. Click Enable Content if the security warning shows.
3. In the SalesPerson tab, click Summarize with PivotTable to create a new tab.

4. Add the FirstName to the Axis, and the SalesYTD to the Values.
5. Add a new PivotChart, as a clustered column chart.
6. Move the chart to a new sheet called Sales Person Chart.
7. Save the file to the <http://mia-sql/sites/adventureworks/Shared Documents>.
8. Open Internet Explorer from the taskbar and navigate to <http://mia-sql/sites/adventureworks/Shared Documents>.
9. Open the Adventure Works Sales workbook online, and then view the Sales Person Chart.

Results: At the end of this exercise, the Adventure Works Sales workbook will be published on SharePoint