



Power BI

Sales Dashboard

SALES DASHBOARD

Actual vs. target revenue (\$)

Opportunity value by pipeline phase

Actual margin

Target margin

Discount by category

Average sales (\$)

Average quota (\$)

Sales Spreadsheet Summary

Revenue by month (current year vs. last year)

Planned v actual category mix

Countries not meeting quota

Sum of Sales

Column Labels

	Channel Partners	Enterprise	Government	Midmarket	Small Business	Total
Sum of Sales	\$ 491,164	\$ 372,050	\$ 336,426	\$ 234,379	\$ 366,538	\$ 1,808,594
Column Labels	United States of America					

Actual Total: \$ 1,808,594

Target Total: \$ 1,808,594

Actual YTD: \$ 1,08M

Target YTD: \$ 1,1M

Revenue by Month (Current Year vs. Last Year):

FY YTD Revenue: \$ 108M

Actual Revenue: \$ 108M

Target Revenue: \$ 11M

Revenue by Month (Current Year vs. Last Year):

January: \$ 10M vs. \$ 10M

February: \$ 11M vs. \$ 11M

March: \$ 12M vs. \$ 12M

April: \$ 13M vs. \$ 13M

May: \$ 14M vs. \$ 14M

June: \$ 15M vs. \$ 15M

July: \$ 16M vs. \$ 16M

August: \$ 17M vs. \$ 17M

September: \$ 18M vs. \$ 18M

October: \$ 19M vs. \$ 19M

November: \$ 20M vs. \$ 20M

December: \$ 21M vs. \$ 21M

Planned v Actual Category Mix:

Actual Mix: 10%, 15%, 20%, 25%, 30%

Target Mix: 10%, 15%, 20%, 25%, 30%

Countries Not Meeting Quota:

North America: Mexico

Europe: France, Germany, Italy, Spain

Asia: China, Korea

Africa: South Africa

South America: Brazil

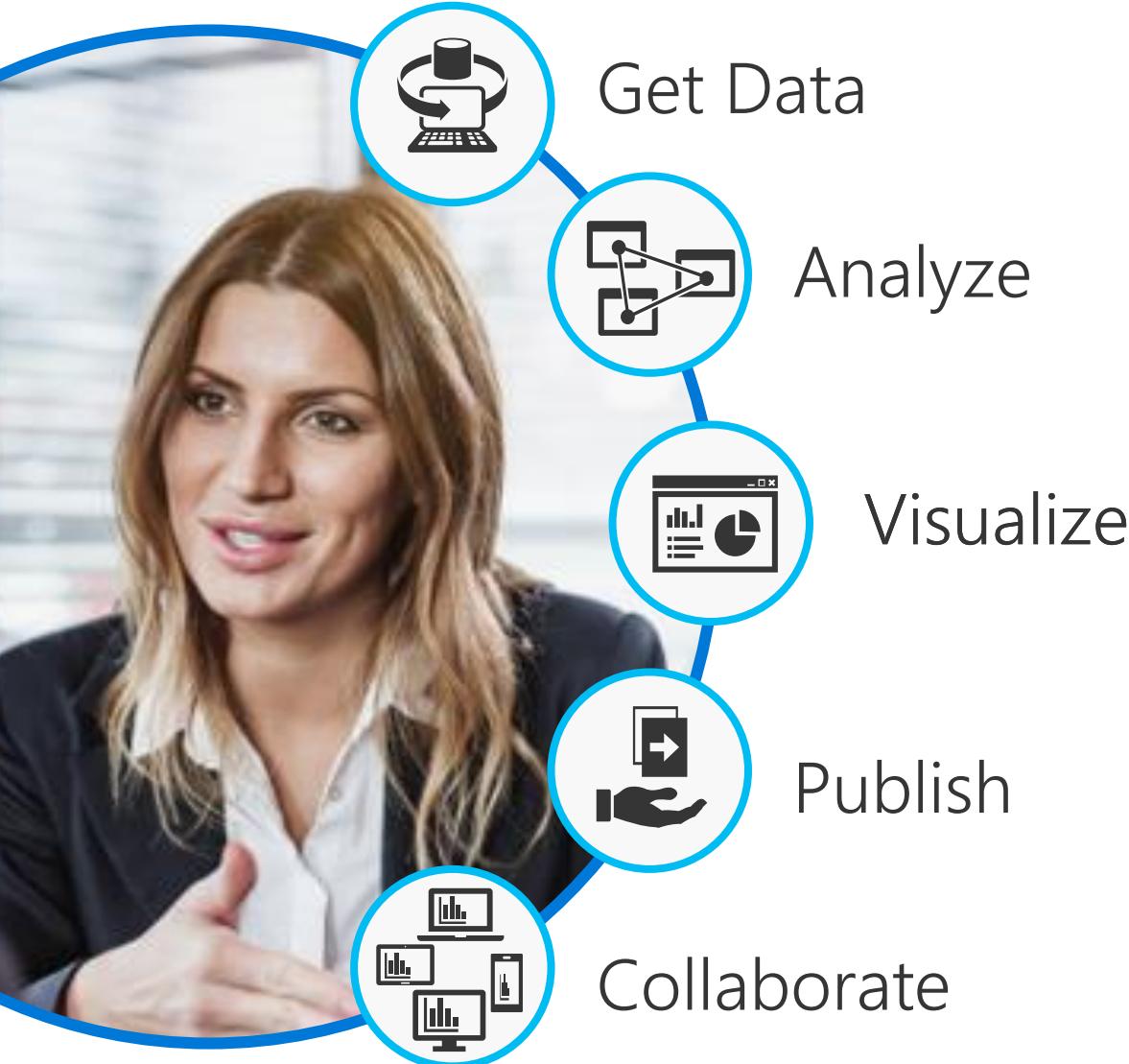
Oceania: Australia

Microsoft Power BI

Александра Чижова
Microsoft



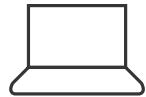
Transforming with data: the Business Analyst role



Power BI Desktop is a **free companion authoring tool** for the Power BI service, updated monthly with new features

Power BI product portfolio

Author



Power BI
Desktop

Free data analysis
and report authoring tool

Share and collaborate



Power BI
service

Cloud-based modern
business analytics solution

Large scale deployments



Power BI
Premium

Dedicated capacity for
increased performance

Share and collaborate



Power BI
Report Server

On-premises report server

App dev



Power BI
Embedded

Visual analytics embedded
in your applications

Create powerful reports with Power BI Desktop

Discovery & exploration

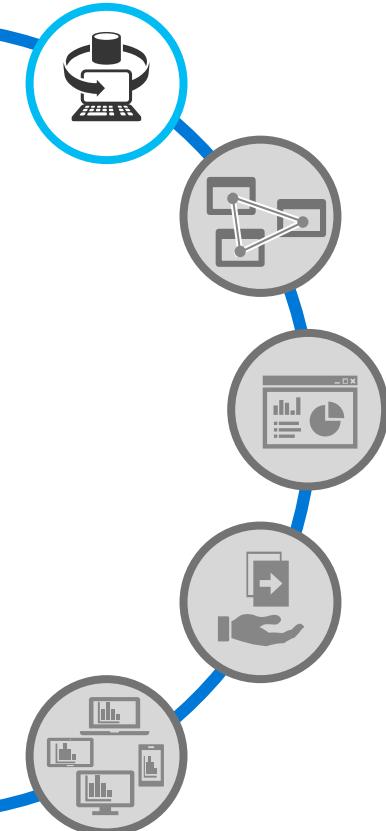
Easy report authoring

Custom visualizations

R, Py, SQL integration



Get Data: Easily connect, clean, and mashup data



Connect to 80+ data sources, both on-premises and cloud

Shape, transform, and clean data for analysis

Live connectivity to on-premises and cloud data sources

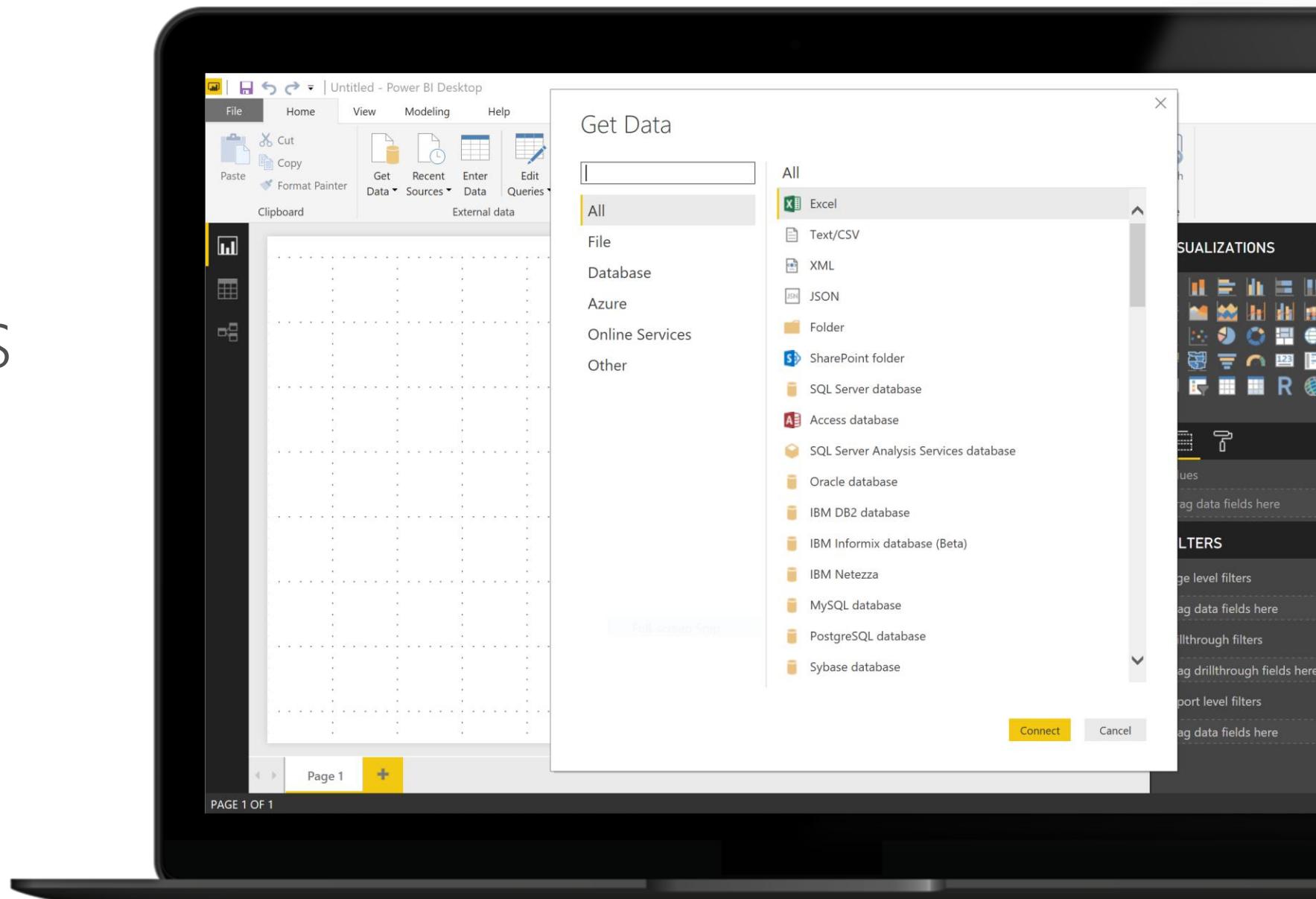
Extend with custom data connectors for any data source



Connect to all your data, wherever it lives

Over 80+ data sources
and growing

In the cloud, on-premises,
or both (hybrid)



Power BI Desktop Data sources

Over 80+ data sources and growing

File

- Excel
- Text/CSV
- XML
- JSON
- Folder
- SharePoint Folder

Database

- SQL Server database
- Access database
- SQL Server Analysis Services database
- Oracle database
- IBM DB2 database
- IBM Informix database (Beta)
- IBM Netezza
- MySQL database
- PostgreSQL database
- Sybase database
- Teradata database
- SAP HANA database
- SAP Business Warehouse server
- Amazon Redshift
- Impala
- Google BigQuery (Beta)
- Snowflake

Azure

- Azure SQL database
- Azure SQL Data Warehouse
- Azure Analysis Services database (Beta)
- Azure Blob Storage
- Azure Table Storage
- Azure Cosmos DB (Beta)
- Azure Data Lake Store
- Azure HDInsight (HDFS)
- Azure HDInsight Spark (Beta)

Online Services

- Power BI service
- SharePoint Online List
- Microsoft Exchange Online
- Dynamics 365 (online)
- Dynamics NAV (Beta)
- Dynamics 365 for Financials (Beta)
- Common Data Service (Beta)
- Microsoft Azure Consumption Insights (Beta)
- Visual Studio Team Services (Beta)
- Salesforce Objects
- Salesforce Reports
- Google Analytics
- appFigures (Beta)
- comScore Digital Analytix (Beta)
- Dynamics 365 for Customer Insights (Beta)
- Facebook

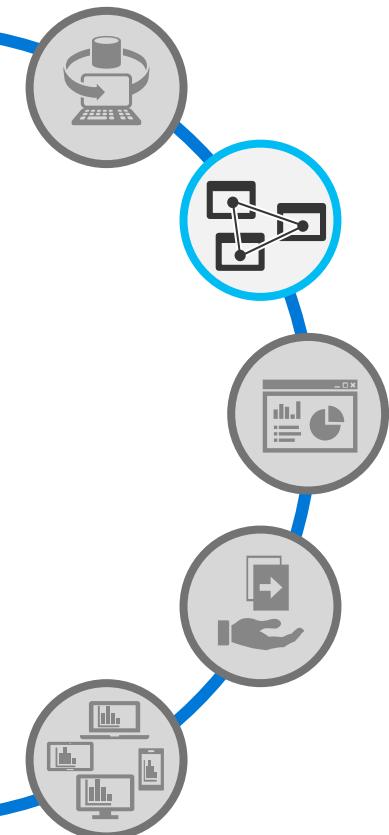
Online Services

- GitHub (Beta)
- Kusto (Beta)
- MailChimp (Beta)
- Marketo (Beta)
- Mixpanel (Beta)
- Planview Enterprise (Beta)
- Projectplace (Beta)
- QuickBooks Online (Beta)
- Smartsheet
- SparkPost (Beta)
- Stripe (Beta)
- SweetIQ (Beta)
- Trouw (Beta)
- Twilio (Beta)
- tyGraph (Beta)
- Webtrends (Beta)

Other

- Vertica (Beta)
- Web
- SharePoint list
- OData Feed
- Active Directory
- Microsoft Exchange
- Hadoop File (HDFS)
- Spark (Beta)
- R script
- ODBC
- OLE DB
- Blank Query

Analyze: Build powerful models and flexible measures

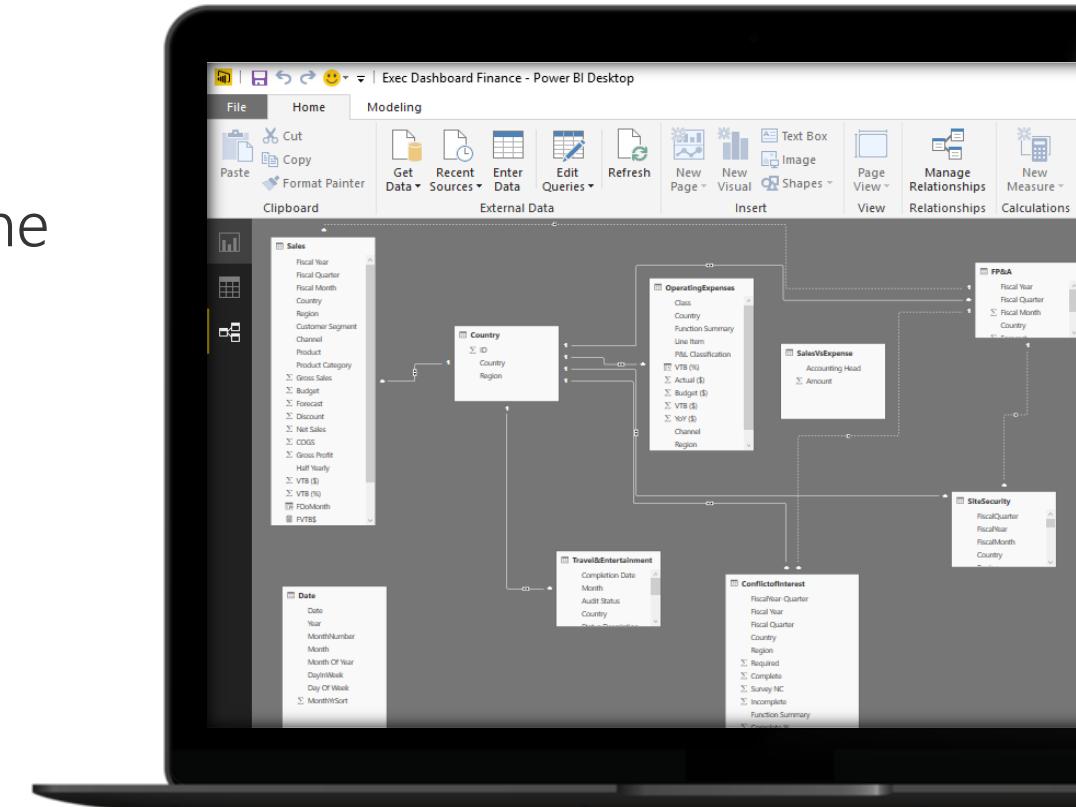


Automatically created model when connecting to data

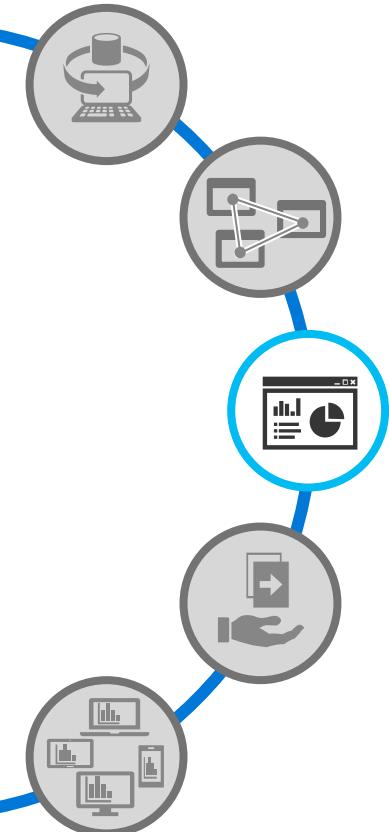
High-performance, in-memory engine

Point and click analysis with Quick Measures, Clustering and Binning

Create powerful measures with familiar DAX formulas



Visualize: Create stunning interactive reports

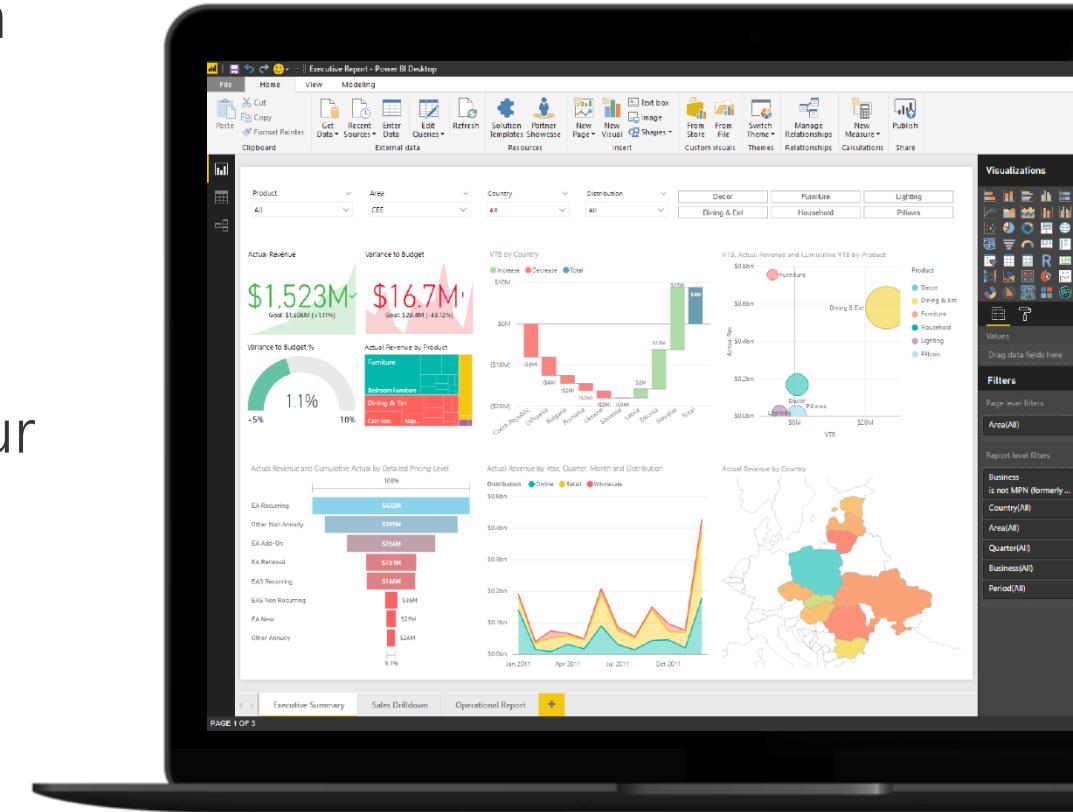


Author reports using 150+ visuals via a drag-and-drop canvas

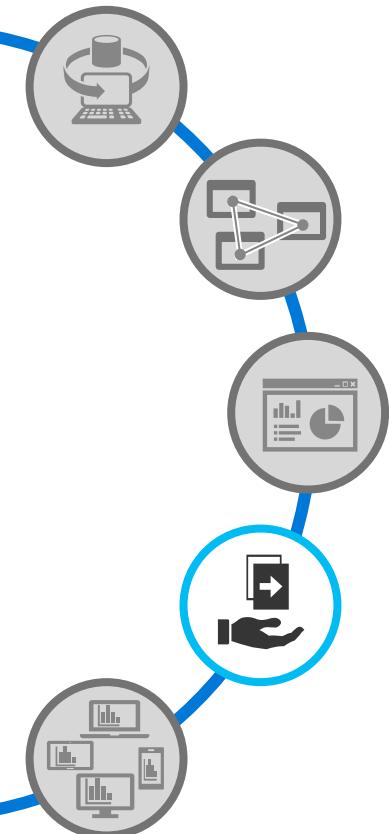
Explore data across multiple interactive visualizations

Provide insights in the context of your business with Custom Visuals

Visualize your data story with bookmarks and custom navigation



Publish: Share insights with others



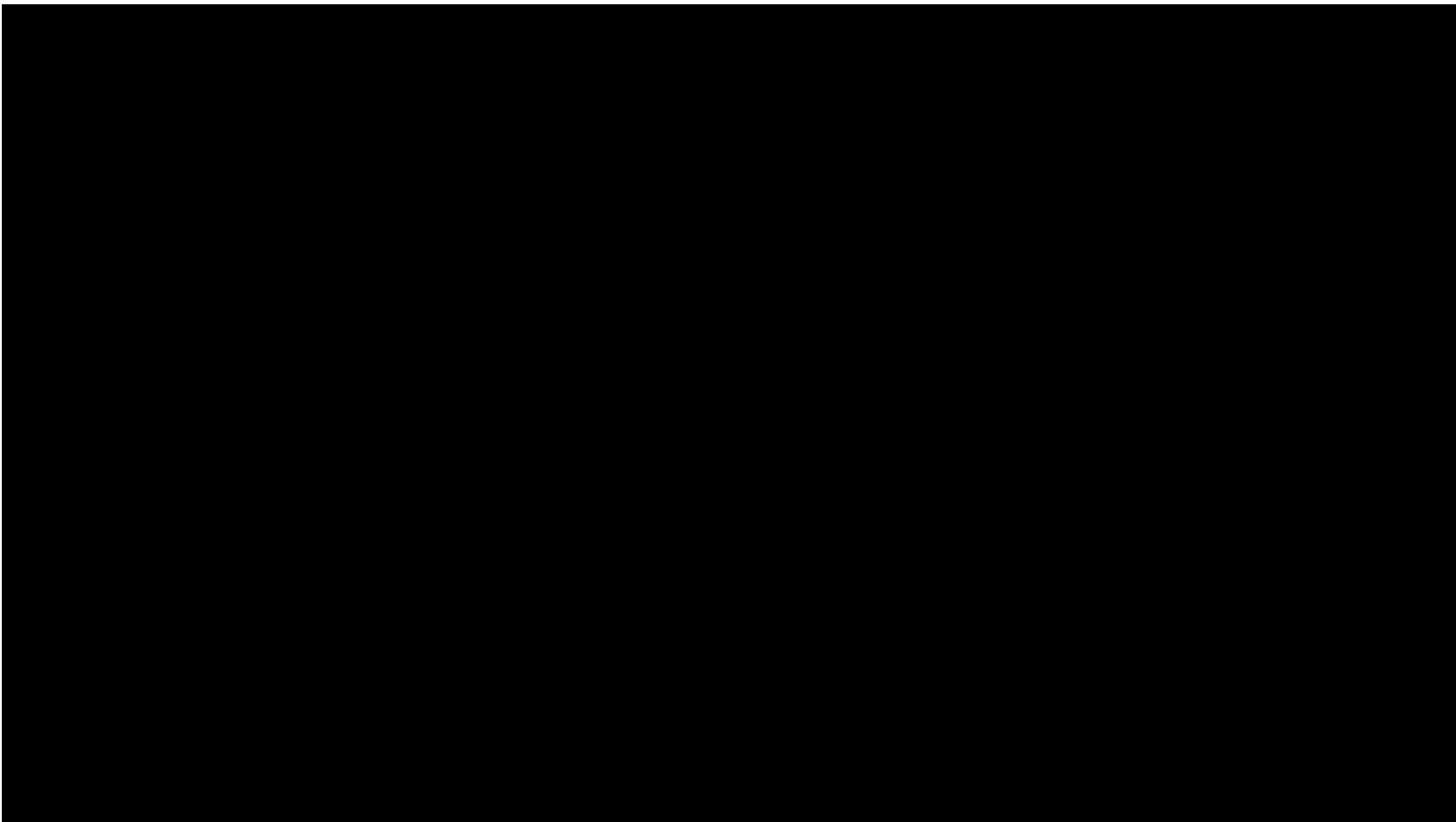
Publish directly to the cloud or on-premises

Automatic data refresh, so your reports are always up to date

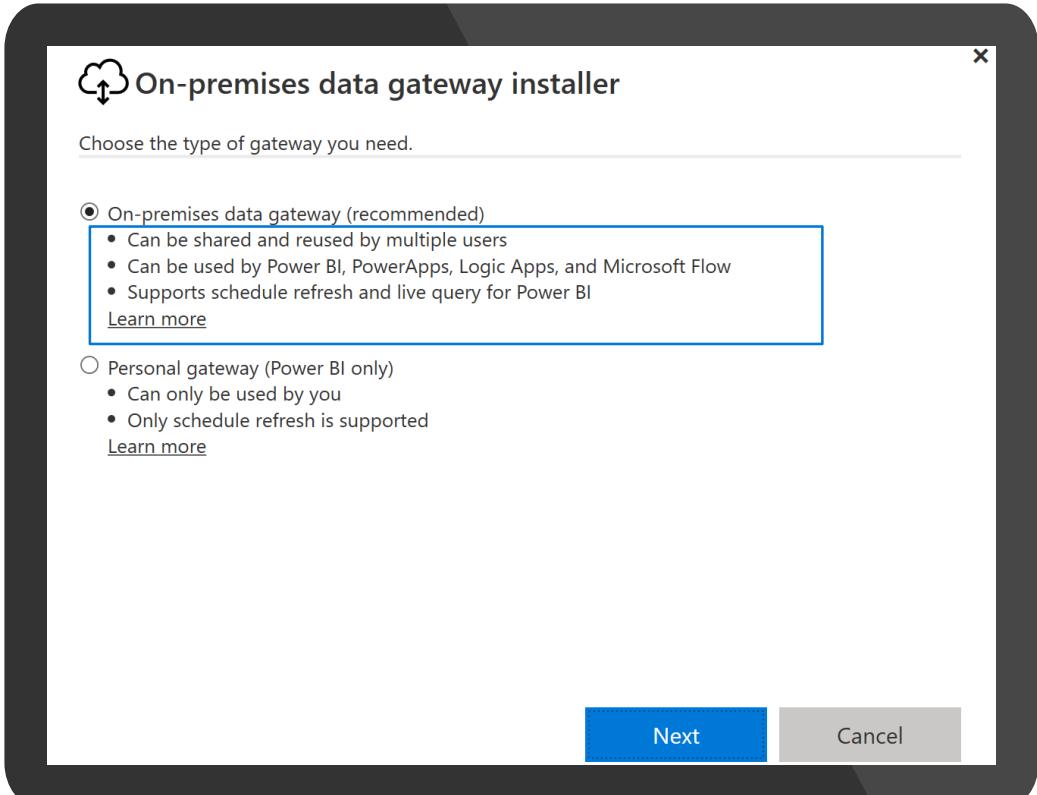
Package your reports in apps for easy consumption and control

Manage your analytics content with admin and governance tools





Gateways—Best practices



Use the On-premises Data Gateway

Ensure to follow minimum configurations

Monitor on the gateway

Scale up or scale out as needed

Separate out import vs. direct query gateways if appropriate

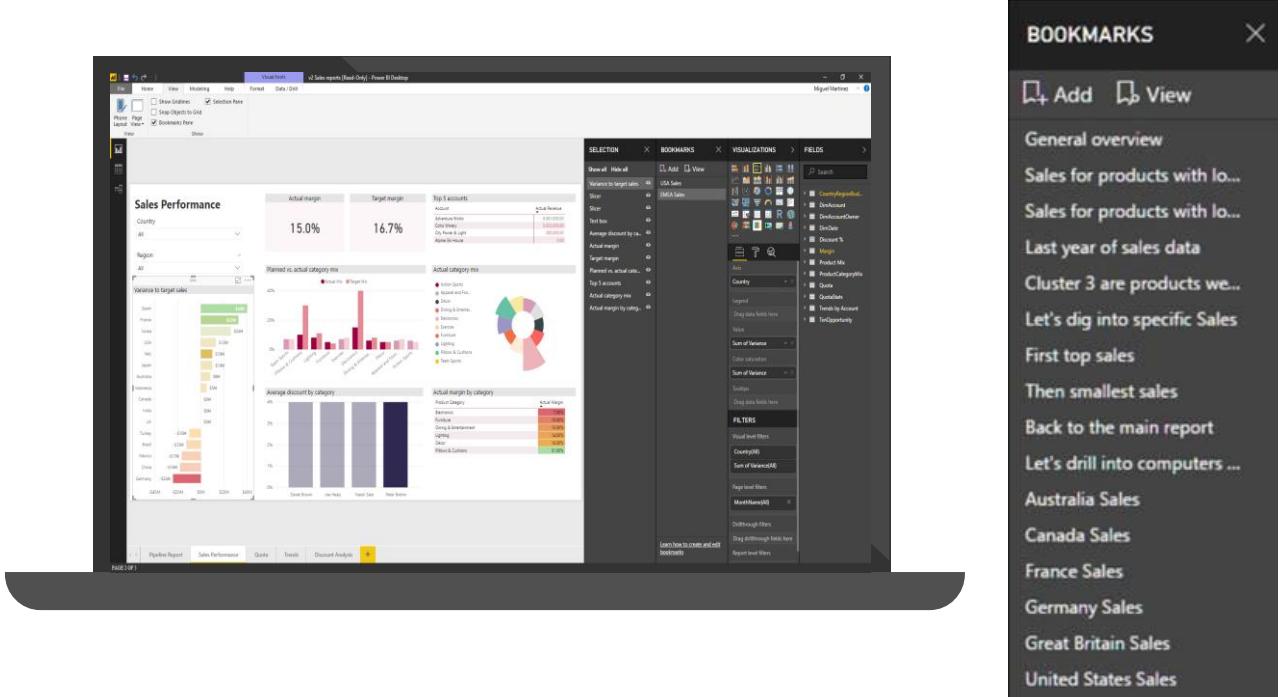
Storytelling and customization with bookmarks

Keep track of states in your exploration

Tell a story with your data guiding your data consumers

Create a custom navigation within a report

Dynamically switch between visuals to tell your story



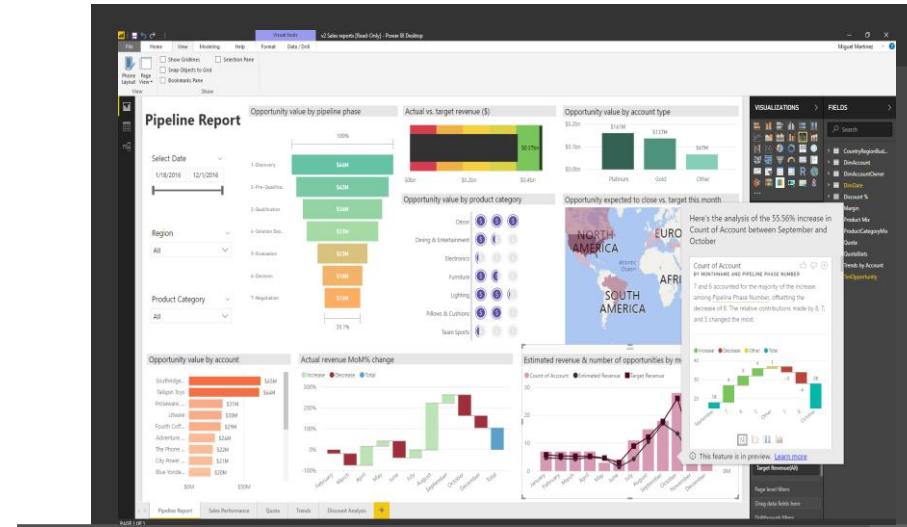
Built-in intelligence to empower everyone

Quick measures for advanced calculations

Out-of-the-box forecasting and through custom visuals

Grouping, binning, and clustering

Built in integration with R, Py, SQL



Automatically generate data insights

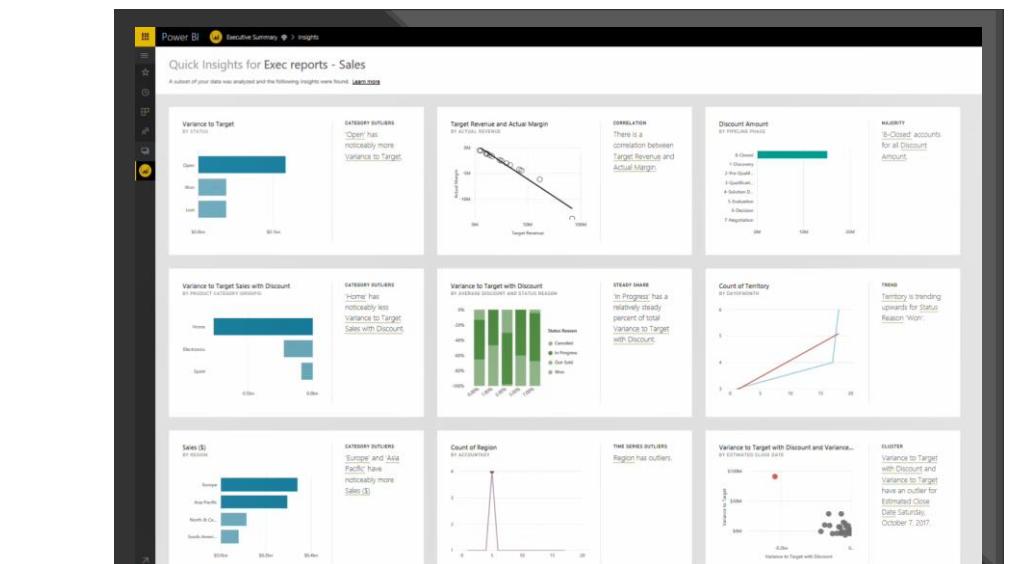
Automatically generate visualizations based on your data

Build a dashboard quickly

Find insight in your data you may have missed

Built on a growing set of advanced algorithms

<https://docs.microsoft.com/en-us/power-bi/service-insight-types>



Quick insights

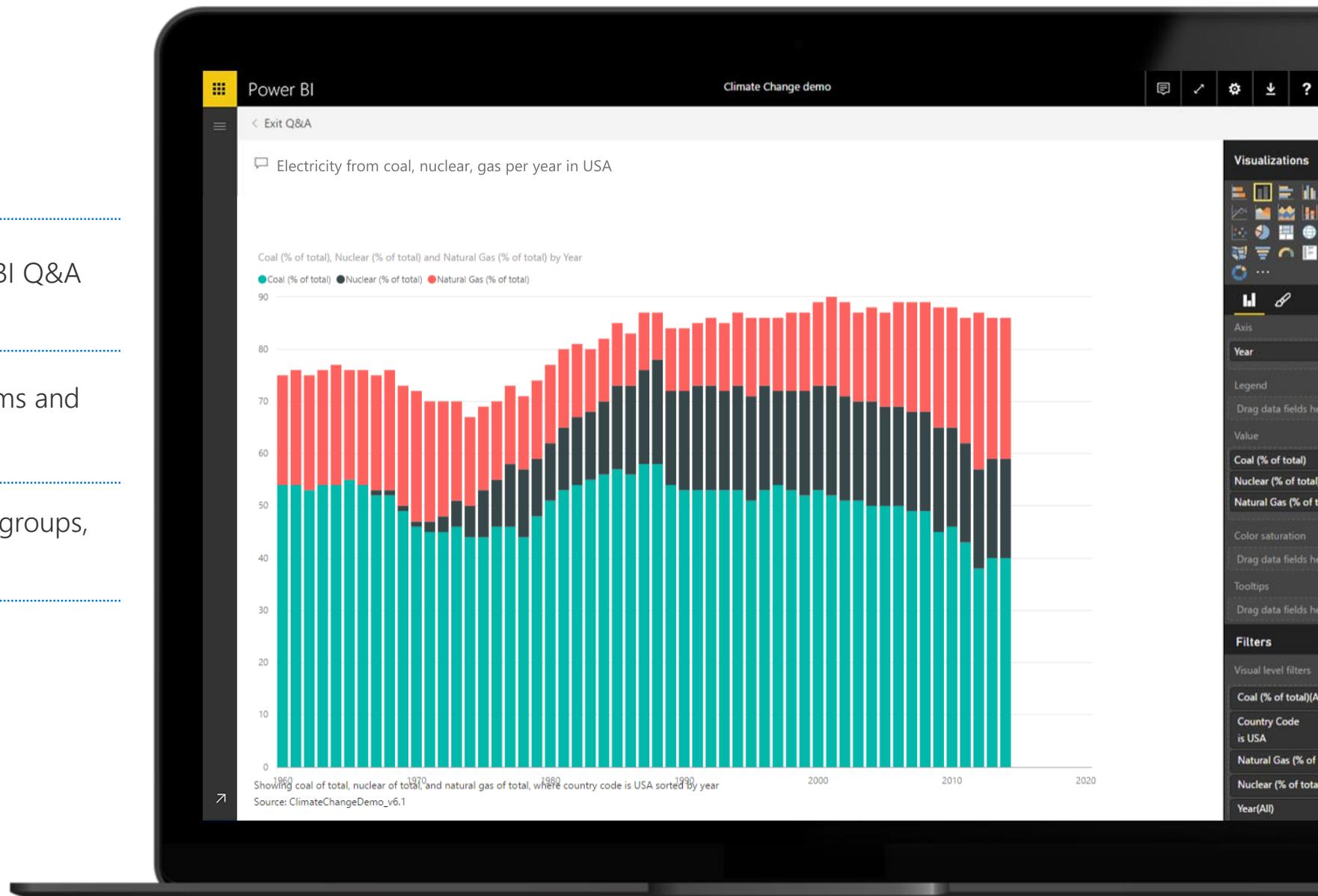
Ask questions of your data – the way you would ask a person

Type questions in plain language – Power BI Q&A will provide the answers

Q&A will provide suggested questions, terms and visuals for your dataset

Q&A intelligently filters, sorts, aggregates, groups, and displays data based on the question

Pin the answers to your dashboard





File Edit View Favorites Tools Help



My Workspace > Customer Profitability Sample MBI

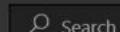
↗ ↘ ⚙️ ⏴ ? 😊 🕵️



Featured dashboard

Favorites

My Workspace



Show: All content

Dashboards



01. Markets/Languages

02. Dynamics 365 EOL

1. VyV Home

1ES Support Metrics

(Prod)Core_Apps Com...

[UAT] ES Targeting Tool

ABE CA Profile Tool

Account Executive De...

Account Master List

Account Search

ACIS Access

Affiliate Program

Alert list: Hourly

All Reports

App Lock Code Sign

AppAnnie iOS engage...

Apportal Analytics

Asset Library

Get Data

Ask a question about your data

Gross Margin %

42.5%

Total Revenue

\$235M

of Customers

83

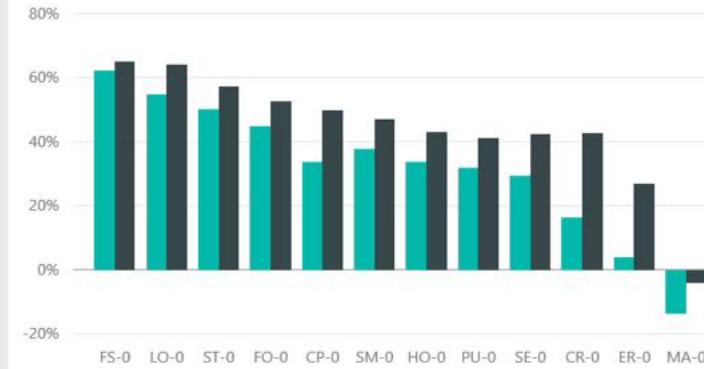
of Products

7

Gross Margin %

BY BUSINESS UNIT, SCENARIO

Scenario: Actual ● Budget



Total Revenue

BY MONTH, SCENARIO

Scenario: Actual ● Budget



Andrew Gross Margin %

44.9%

Annelie Gross Margin %

37.8%

Carlos Gross Margin %

38.5%

Tina Gross Margin %

53.8%

Andrew Gross Margin Trend

BY MONTH, EXECUTIVE NAME

Execut... ● Andrew Ma



Annelie Gross Margin Trend

BY MONTH, EXECUTIVE NAME

Execut... ● Annelie Zubar



Carlos Gross Margin Trend

BY MONTH, EXECUTIVE NAME

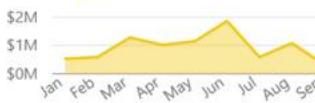
Execut... ● Carlos Grilo



Tina Gross Margin Trend

BY MONTH, EXECUTIVE NAME

Execut... ● Tina Lassila



Gross Margin %

BY MONTH

Revenue Variance % to Budget

BY MONTH

Total Revenue

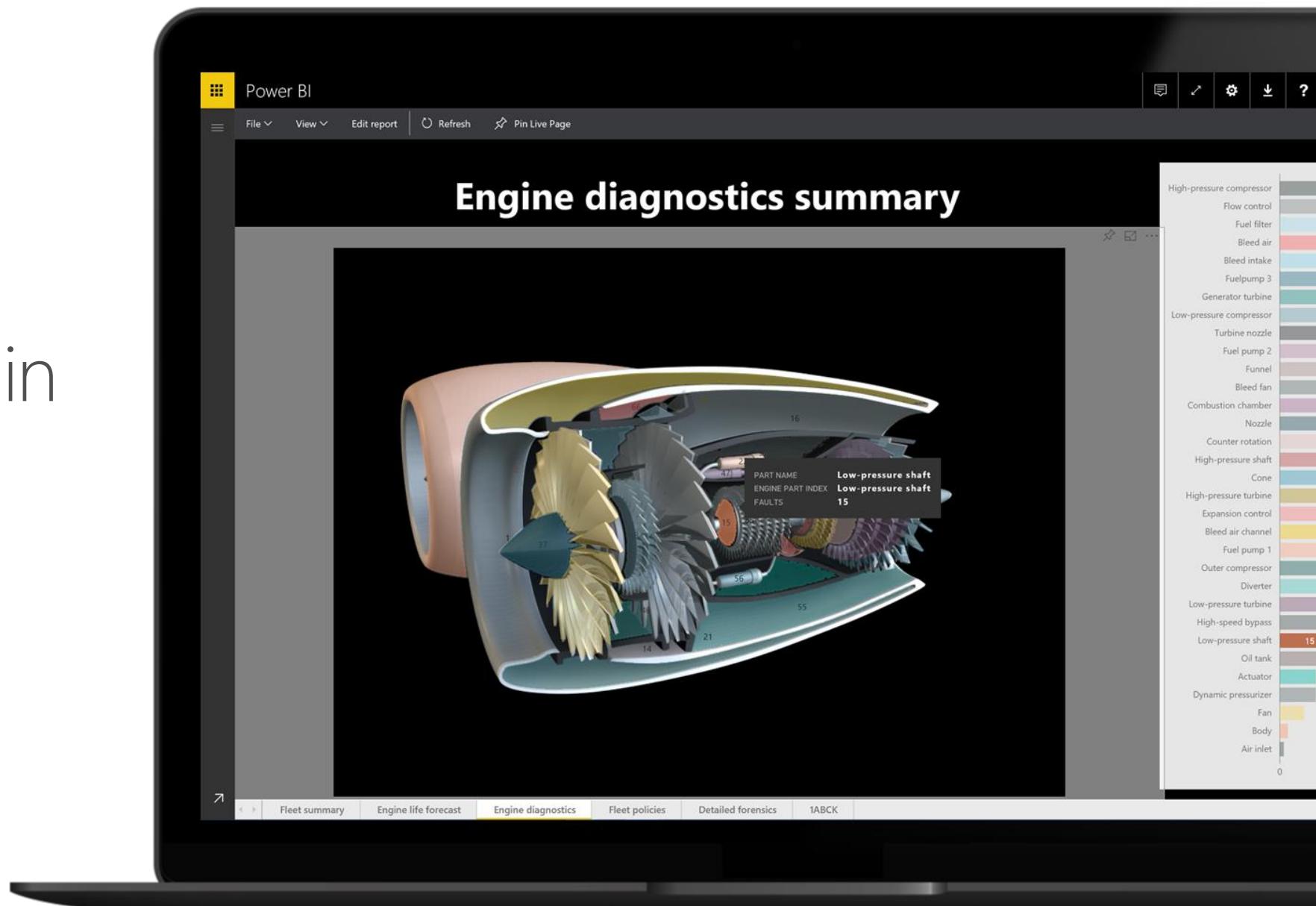
BY REGION

Valery Gross Margin %

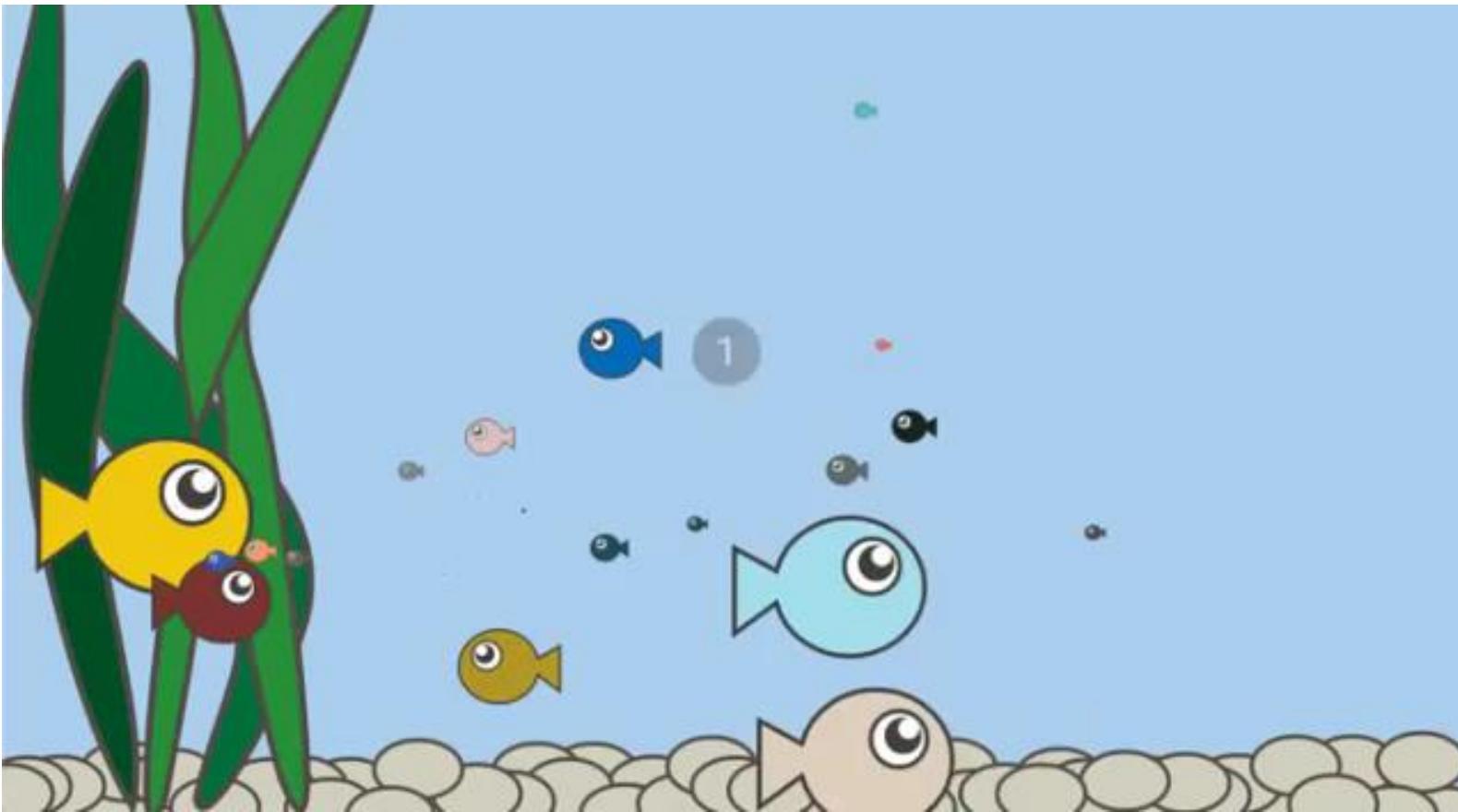
BY MONTH, EXECUTIVE NAME

Visualize insights in
the context of
your data and
business

Custom visuals gallery

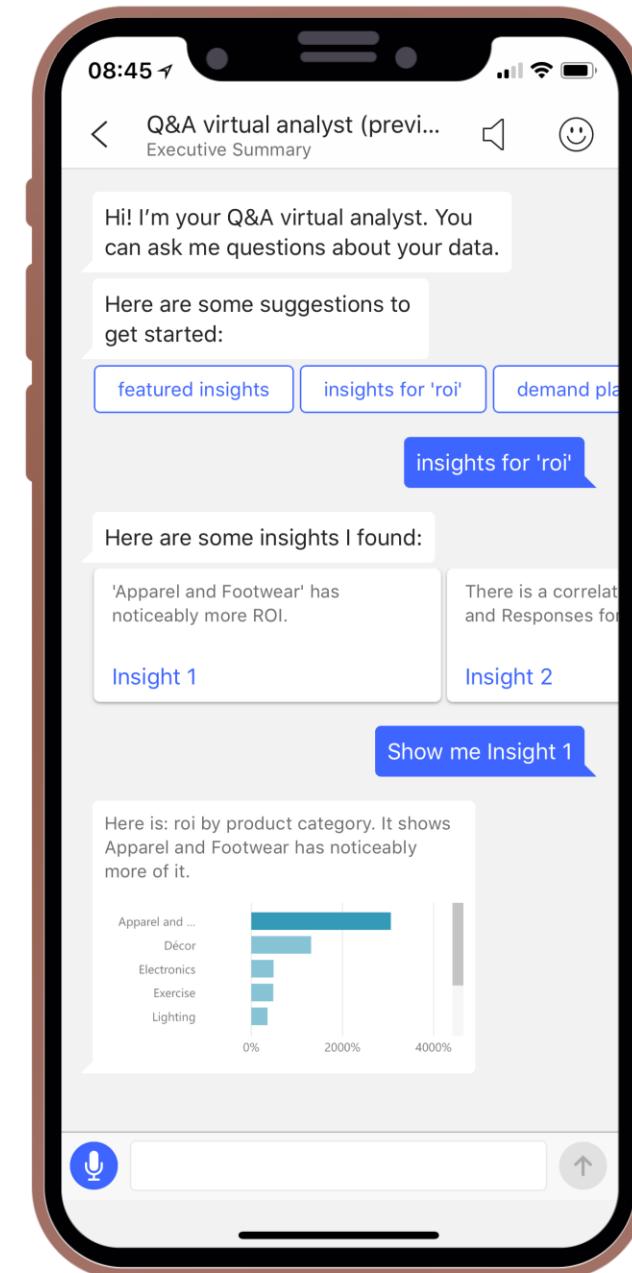


Enlighten Aquarium

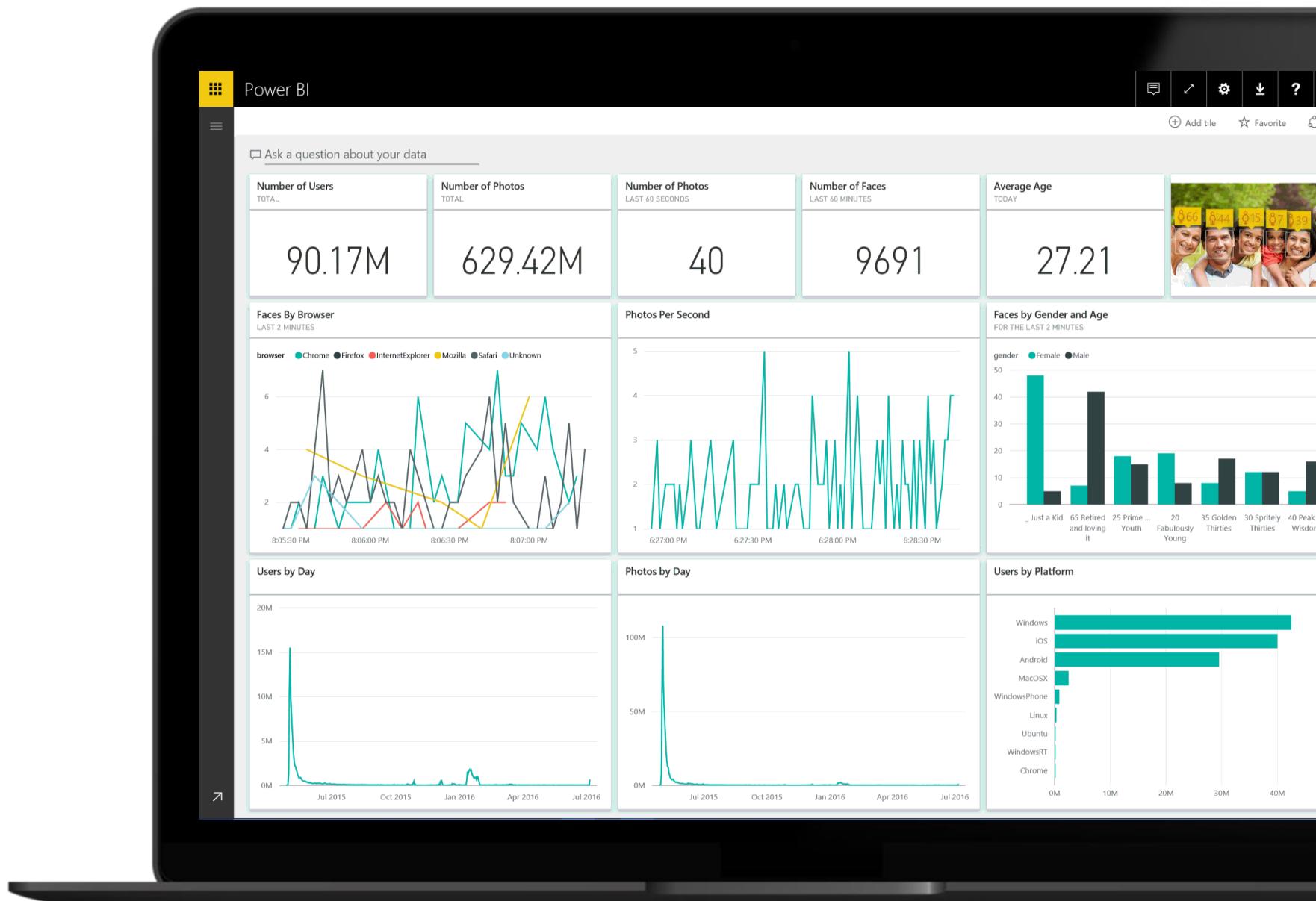


[Link](#) to visual

Stay connected to your data on the go



Run your reports in real time with live dashboards



Accelerate deployment with Solution Templates and Partner solutions

The image shows a smartphone displaying the Microsoft AppSource website. The search bar at the top right contains the text "Search Microsoft AppSource". Below the search bar, there are navigation links for "Cloud", "Mobility", "Productivity", and a "How it works" link. The main content area shows a filtered list of "App results (113)" under the heading "Power BI apps". The results are presented in a grid format with four columns. Each result card includes a thumbnail icon, the app name, the developer, the price (all listed as "Free"), and a "Get it now" button.

App	Developer	Price	Action
Microsoft Project Online	By Microsoft Power BI apps	Free	Get it now
Office 365 Adoption Preview	By Microsoft Power BI apps	Free	Get it now
Google Analytics	By Microsoft Power BI apps	Free	Get it now
Microsoft Dynamics NAV	By Microsoft Power BI apps	Free	Get it now
Microsoft Azure Enterprise	By Microsoft Power BI apps	Free	Get it now
Salesforce	By Microsoft Power BI apps	Free	Get it now
JIRA	By Microsoft Power BI apps	Free	Get it now
Microsoft Dynamics CRM Online Sales Manager	By Microsoft Power BI apps	Free	Get it now

Embed reports anywhere

Microsoft Power BI Embedded Sample

Sample Documentation

1. Authorize

2. Embed

3. Interact

Embed Report

Select mode to embed your report in:

View mode

Edit mode

Create mode

Fill in the fields below to get the code to embed your report.

Embedded Token: H4sIAAAAAAAEAC2WiwotWQSE_vtayG9qYZepPte5y69976G-fcpmtiel

Embed URL: <https://app.powerbi.com/reportEmbed?reportId=bd851208-5592-4e3e-reportId>

Report Id: bd851208-5592-4e3e-ba72-5c6fc39f41c

Code

```
// Read embed application token from textbox
var txtAccessToken = $('#txtAccessToken').val();

// Read embed URL from textbox
var txtEmbedUrl = $('#txtEmbedReportId').val();

// Read report ID from textbox
var txtEmbedReportId = $('#txtEmbedReportId').val();

// Get models. models contains names that can be used.
var models = window['powerbi-client'].models;

// We give All permissions to demonstrate switching between View and Edit mode and
// saving report.
var permissions = models.Permissions.All;

// Embed configuration used to describe the what and how to embed.
// This object is used when calling powerbi.embed.
// This also includes settings and options such as filters.
// More info here: https://www.powerbi.com/developer/embed-api/embed-options
```

Log Viewer

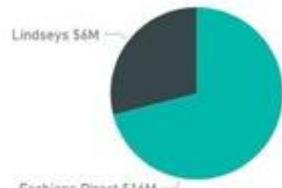
> Loaded

Copy Clear

Embedded View

Store Sales Overview

This Year Sales by Chain



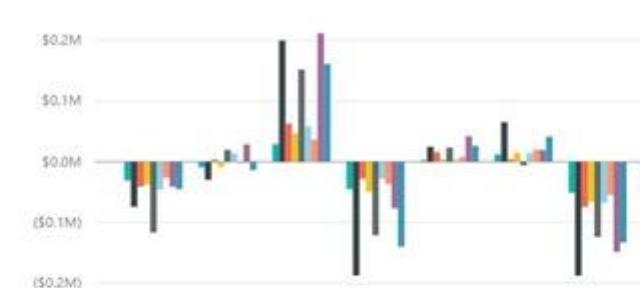
Lindseys \$6M

Fashions Direct \$16M

10 New Stores

104 Total Stores

Total Sales Variance by FiscalMonth and District Manager



District Manager

- Allan Guinot
- Andrew Ma
- Annelie Zubair
- Brad Sutton
- Carlos Grilo
- Chris Gray
- Chris McGurk
- Tina Lassila
- Valery Ushakov

This Year Sales by PostalCode and Store Type



Store Type: ● New Store ● Same Store

Total Sales Variance %, Sales Per Sq Ft and This Year Sales by District and District



FD = 01

User-driven innovation with continuous updates

Reporting

- Bookmarking (preview)
- Selection pane and visual display controls
- Bookmark links for shapes and images (preview)
- Spotlight
- Scatter and bubble markers
- Increase the number of data points shown in scatter charts
- Drillthrough to another report page
- Explain the increase/decrease insights (preview)
- Ribbon chart
- Theming preview update—chart style controls
- Accessibility improvements: Accessible See data and keyboard shortcut helper dialog
- High density scatter chart sampling
- Cartesian gridline style control
- Visio visual (preview) Show values on rows for matrix
- Color scales on font colors for table and matrix
- Custom subtotal settings per level of matrix
- Line styles and legend options
- Scatter chart performance improvements
- New table and matrix visuals are now generally available
- Renaming fields in visuals
- Custom visuals store integration
- Relative date filters

- Responsive layout for visuals (preview)
- New waterfall chart option—breakdown
- Data bars for new table and matrix (preview)
- Markers on line and area charts
- Consume Power BI reports with keyboard navigation and screen reader support and create accessible reports
- Visuals font family setting
- Horizontal Image Slicer
- Shade area of the line
- Bing maps improvements
- Map themes
- Improved geo hierarchy experience
- High density line sampling
- Relative date slicer (preview)
- New table visual (preview)
- Combo chart data label enhancements
- More URL support in table and matrix
- Mailto links in textbox

Analytics

- Quick measures for SSAS live connections
- Sales from new customers quick measure
- Cell-level formatting for multidimensional AS models
- What if parameters
- New scatter chart analytics features
- Symmetry shading
- Ratio line
- New quick measure: weighted average
- Quick measures from the community: Star rating and concatenated list of values
- Bidirectional cross filtering for DirectQuery is now generally available
- Report level measures for live connections to Analysis Services tabular models and Power BI service datasets
- 2 new quick measures (preview): Total for category and Rolling average
- Bin by count

Data connectivity

- Vertica connector (beta)
- SAP BW connector: support for additional member properties
- Azure Consumption Insights connector
- Improvements to the Dynamics 365 for Financials connector
- Live connect to the Power BI service is generally available
- Google BigQuery connector (beta)
- Snowflake connector general availability
- Power BI service Live Connect to On-Premises and Push datasets
- Impala connector GA
- Amazon Redshift GA
- SAP BW connector—DQ support (beta)
- IBM Netezza connector (beta)
- New connector: Dynamics 365 for Customer Insights
- Combine files—ability to reference "First File" as example

Other

- Two new transforms:
- Extract text before/after/between delimiters
- Unpivot only selected columns
- "Add Column From Examples" enhancements
- Power BI Desktop in the Windows Store
- Improved access to help content

<https://powerbi.microsoft.com/en-us/blog/category/features/>

<https://ideas.powerbi.com/forums/265200-power-bi>

Self-service prep for big data

Prep your data using
the familiar Power
Query experience

Get started quickly with
a common data model

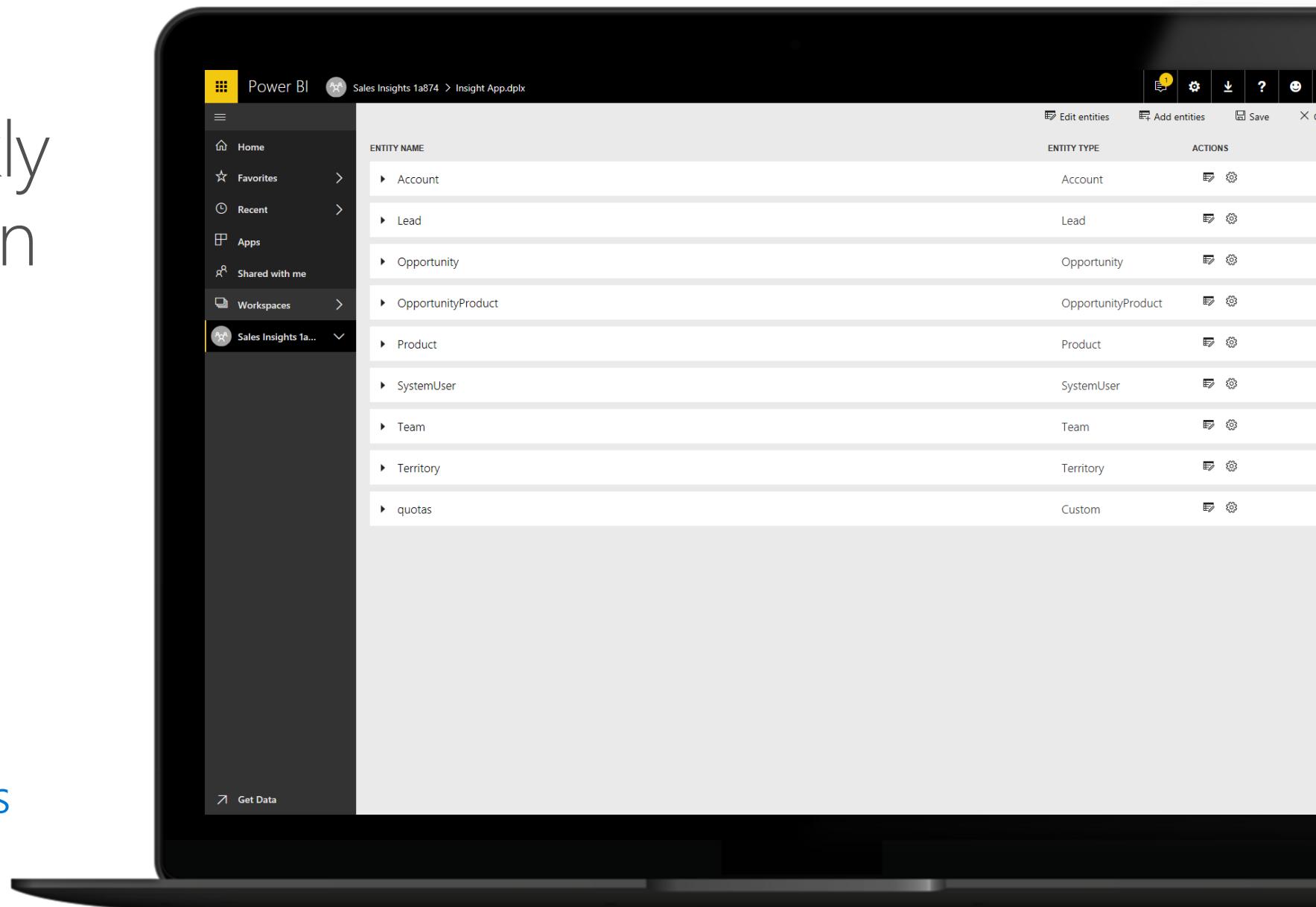
Unify access to data
between Power BI and
Azure Data Lake Storage

The screenshot illustrates the Power BI desktop application's self-service data preparation capabilities. It shows a 'Choose Data' dialog box open, allowing users to select datasets from an Azure SQL database. The 'quotas' dataset is selected, and its data is displayed in a table view. The table contains columns for Owner Name, Fiscal Quarter, Year, and Quota, showing various user quotas for the first quarter of 2018. The overall interface is designed to be familiar to Power Query users, providing a central hub for managing data from multiple sources.

Get started quickly with the Common Data Model

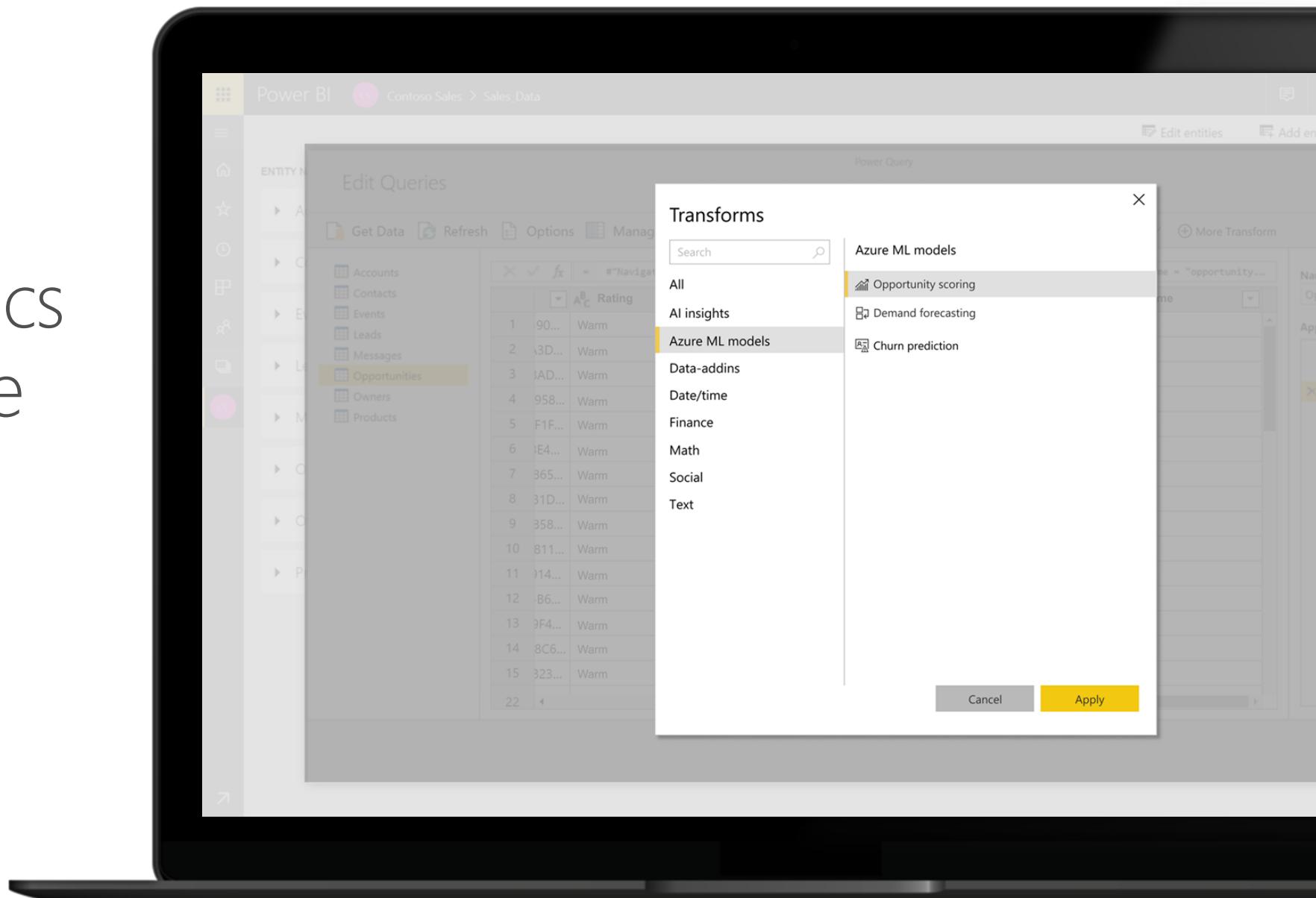
Take advantage of a
standardized and
extensible collection
of data schemas

Enrich your models with
other data sources from
Microsoft and third parties



Advanced analytics and AI with Azure

Business analysts can
benefit from the work of
data scientists who build
ML models in Azure



Custom formatting and more

More advanced controls
for report authors to
dynamically change
formatting based on t
data in their model

Line style

Format by

Expression ▾

[Learn more](#)

Default formatting ⓘ

Specific color ▾



```
= SWITCH (
    SELECTEDVALUE([Type]),
    "Standard", "#ABABAB",
    "#DDDDDD"
)
```

Data color

Format data points based on

Expression ▾

[Learn more](#)

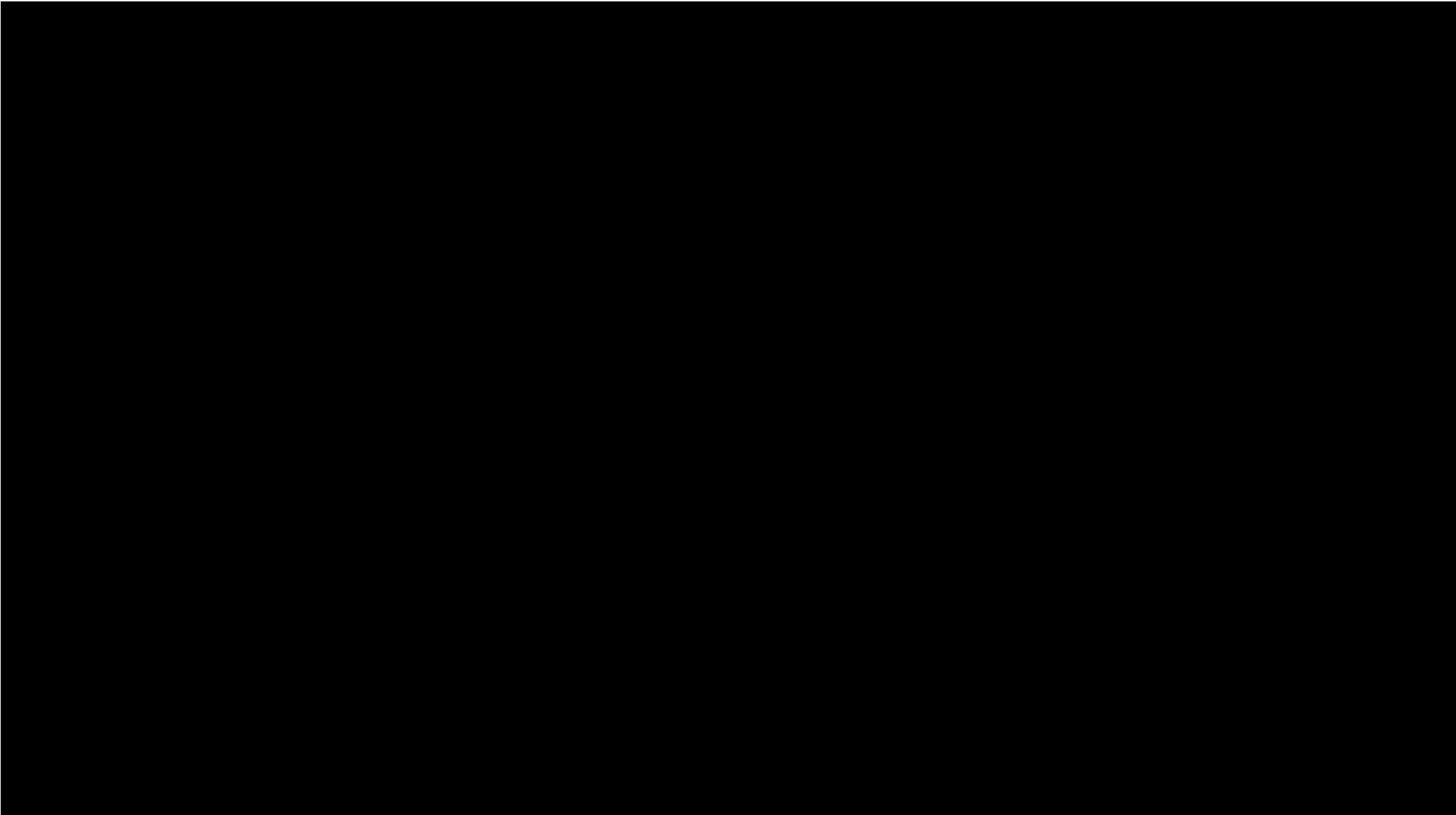
Default data color ⓘ

Specific color ▾



```
= IF([Total Sales] > [Sales Target]),
    "#BB3333",
    "#DDDDDD"
)
```

Power BI and HoloLens mixed reality vision



Summary



Try working in Power BI Desktop



[Download Power BI Mobile app with demos](#)

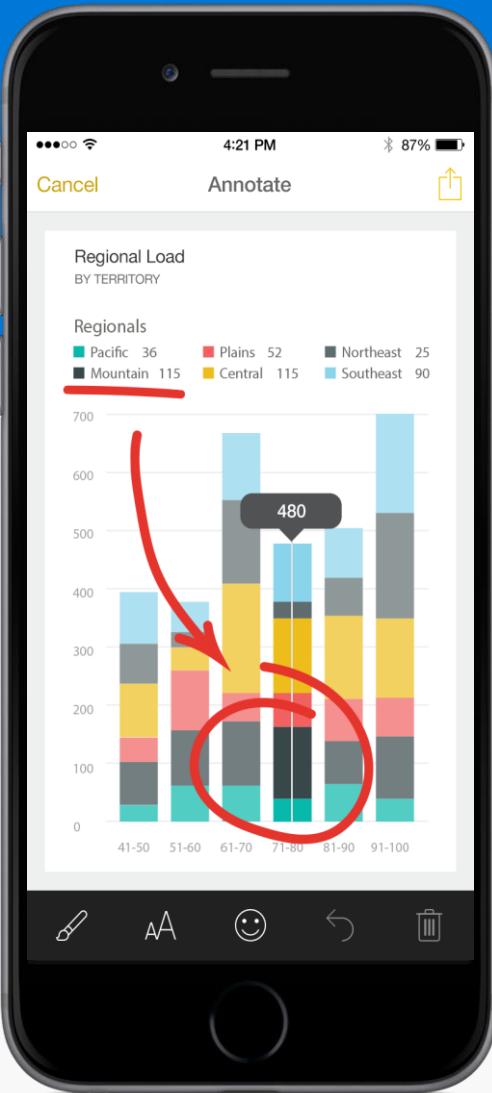


For sharing reports, [get Power BI Pro trial](#)

Мобильный PowerBI



Скачать для iOS



Скачать для Android

Resources

[Скачать Power BI Desktop](#)

[Документация](#)

[Материалы для обучения, курс по Power BI на Edx](#)

[Русскоязычная группа в fb](#)

[Видео](#)

[Блог](#)

Q & A

