



Dashboard in a Day – Lab 2

Data Modeling and Exploration

by Power BI Team, Microsoft



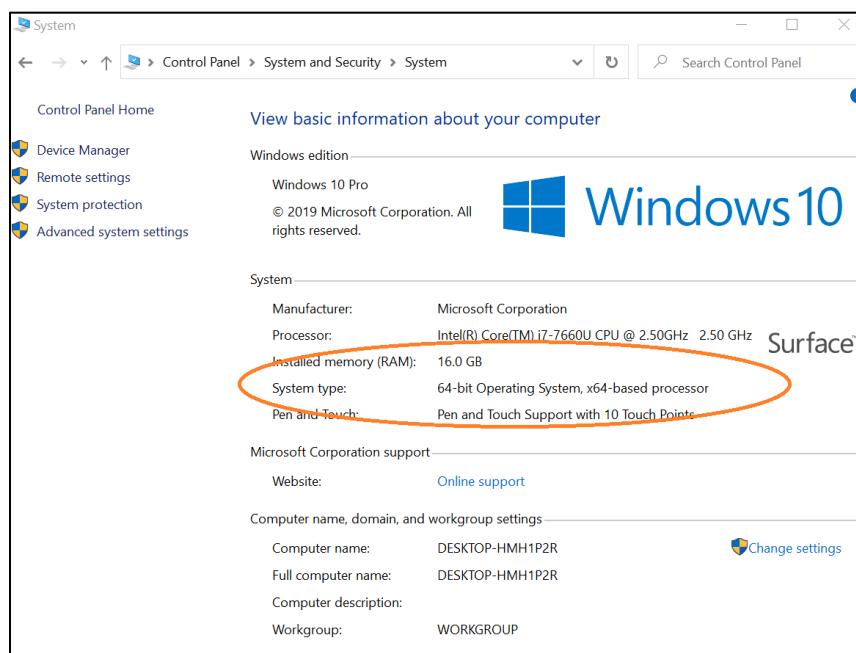
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Lab Prerequisites

The following prerequisites and setup must be done for successful completion of the lab:

- You must be connected to the internet.
- You must have Microsoft Office installed.
- You must be signed up for Power BI: Go to <http://aka.ms/pbidiadtraining> and sign up for Power BI with a business email address. If you cannot sign up for Power BI, let the instructor know. If you have an existing account, please use the same URL as above to log in.
- You must have, at minimum, a computer with 2-cores and 4GB RAM running Windows 8, Windows Server 2008 R2, or later.
- If you choose to use Internet Explorer, it will require version 10 or greater. You can also use Microsoft Edge or Google Chrome.
- You must verify if you have a 32-bit or a 64-bit operating system so you can install 32-bit or 64-bit applications. To check your operating system type:
 - Open Control Panel, click **System and Security**, and then click **System**.
 - You will be able to identify if your operating system is 32-bit or 64-bit based on **System type** as shown below.



- You must download the Power BI Content: Create a folder called **DIAD** on the C drive of your local computer. Copy all contents from the folder called **Dashboard in a Day Assets** to the **DIAD** folder you just created (C:\DIAD).
- You must download and install Power BI Desktop using any one of the options listed below:

- If you have Windows 10, use Microsoft App Store to download and install the Power BI Desktop app.
- Download and install the Microsoft Power BI Desktop from <http://www.microsoft.com/en-us/download/details.aspx?id=45331>.
- If you already have the Power BI Desktop installed, ensure you have the latest version of Power BI downloaded.
- You must download and install the Power BI Mobile App on your mobile device.
 - If you are using an Apple product, download and install the Microsoft Power BI Mobile app from the Apple store or visit this link: <https://apps.apple.com/us/app/microsoft-power-bi/id929738808>
 - If you are using an Android product, download and install the Microsoft Power BI Mobile app from the Google Play store or visit this link: <https://play.google.com/store/apps/details?id=com.microsoft.powerbim>

Document Structure

This is lab two out of five labs in total. Please continue to use your file after completing Lab 1, if you are joining the DIAD at this point or were unable to complete Lab 1, please start this lab with the “Lab 1 solution.pbix” file you can find in the **Reports** folder.

In this lab you will learn how to:

- create a range of different charts.
- highlight and cross-filter.
- create new groups and hierarchies.
- add new measures to the model to do additional analysis.

The lab includes steps for the user to follow along with associated screenshots that provide a visual aid. In the screenshots, sections are highlighted with red or orange boxes to indicate the area the user needs to focus on.

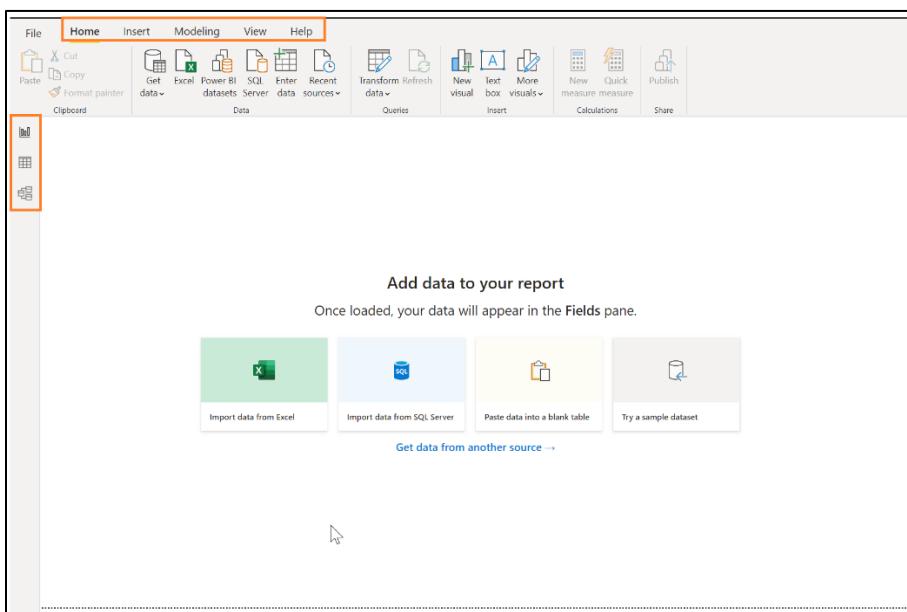
Note: This lab uses real, anonymized data provided by ObviEnce, LLC. Visit their site to learn about their services: www.obvience.com. This data is the property of ObviEnce, LLC and has been shared to demonstrate Power BI functionality with industry sample data. Any use of this data must include this attribution to ObviEnce, LLC.

Power BI Desktop – Data Modeling and Exploration

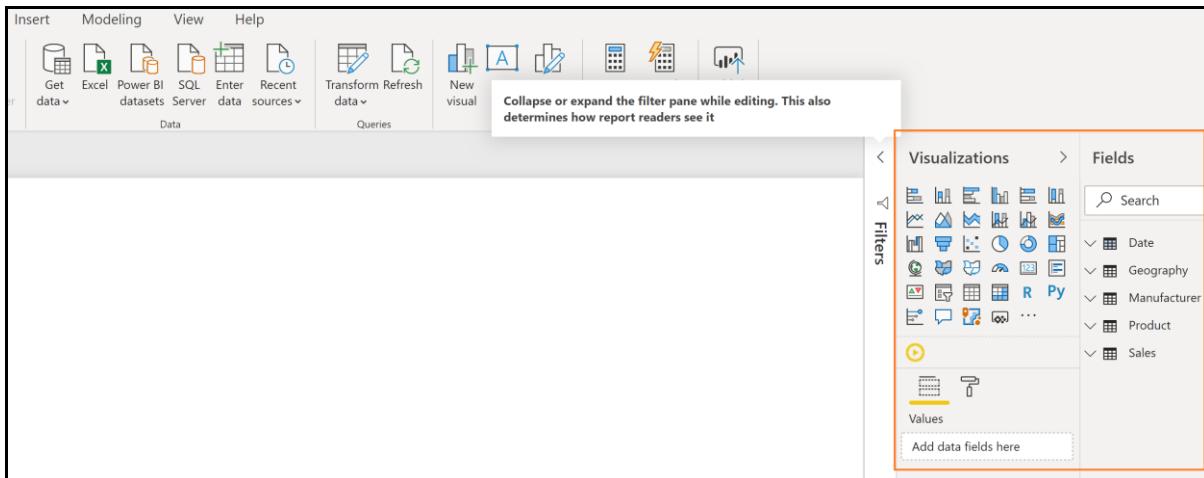
In this section, we will learn about the [key parts of the Power BI desktop](#). We will model and explore the data and build visuals.

Power BI Desktop - Layout

Let's start with the main **Power BI Desktop** window and become familiar with the distinct sections available.



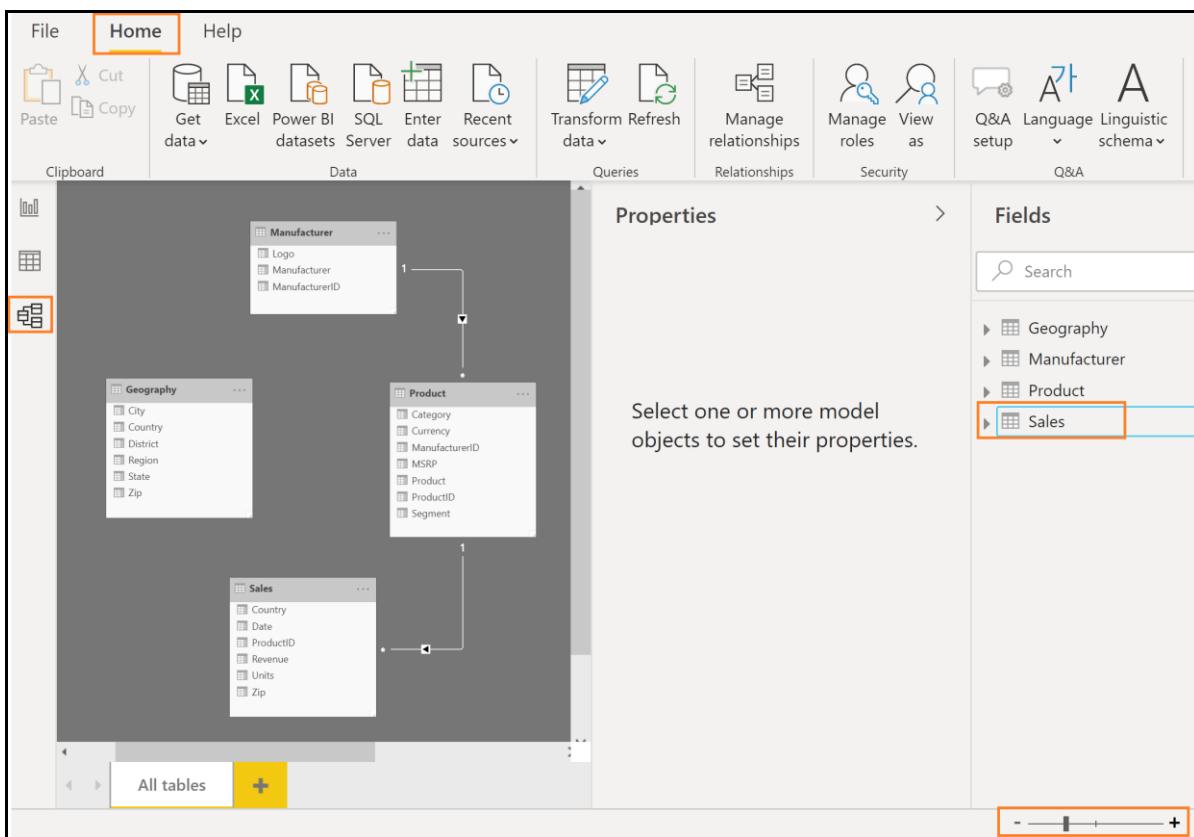
1. On the top of the window, you see the **Home** tab where the most common operations you perform are available.
2. The **Insert** tab in the ribbon allows you to insert shapes, a text box or new visuals
3. The **Modeling** tab in the ribbon enables additional data modelling capabilities like adding custom columns and calculating measures.
4. The **View** tab has options to format the page layout.
5. The **Help** tab provides self-help options like guided learning, training videos and links to online communities, partner showcase and consulting services.
6. On the left side of the window, you have three icons, **Report**, **Data** and **Model**. If you hover over the icons, you can see the tooltips. Switching between these allows you to see the data and the relationships between the tables.
7. The center **white space** is the canvas where you will be creating visuals.



8. The **Visualizations** panel on the right allows you to select visualizations, add values to the visuals, and add columns to the axis or filters.
9. The **Fields** window on the right panel is where you see the list of tables which were generated from the queries. Click the (downward facing triangle) next to a table name to expand the field list for that table.

The screenshot shows the Microsoft Power BI desktop application. The ribbon at the top has a "Table tools" tab highlighted. Below the ribbon, there are buttons for Name (Sales), Mark as date table (with a calendar icon), Manage relationships, and New (options for measure, measure column, table, and calculations). The main area shows a data grid with columns: ProductID, Date, Zip, Units, Revenue, and Country. The first few rows of data are: 2213, Wednesday, December 27, 2017, 02764, 1, \$89.1975, USA. To the left of the grid, there's a table structure icon with an orange border. On the right, there's a "Fields" pane with a search bar and a tree view of tables: Geography, Manufacturer, Product, and Sales. The "Sales" table is expanded, showing its columns: Country, Date, ProductID, Revenue, Units, and Zip. An orange box highlights the "Table tools" ribbon, the data grid, and the expanded "Sales" table in the "Fields" pane.

10. Click on the **Data** icon on the left side. Expand the **Sales** table in the **Fields** as shown in the figure above. Scroll up and down to notice how fast you can navigate through over three million rows.



11. Click on the **Model** icon on the left panel of Power BI Desktop. You see the tables you have imported along with Relationships. The Power BI Desktop automatically infers relationships between the tables.

- A relationship is created between the Sales and Product tables using the **ProductID** column.
- A relationship is created between the Product and Manufacturer tables using the **ManufacturerID** column.

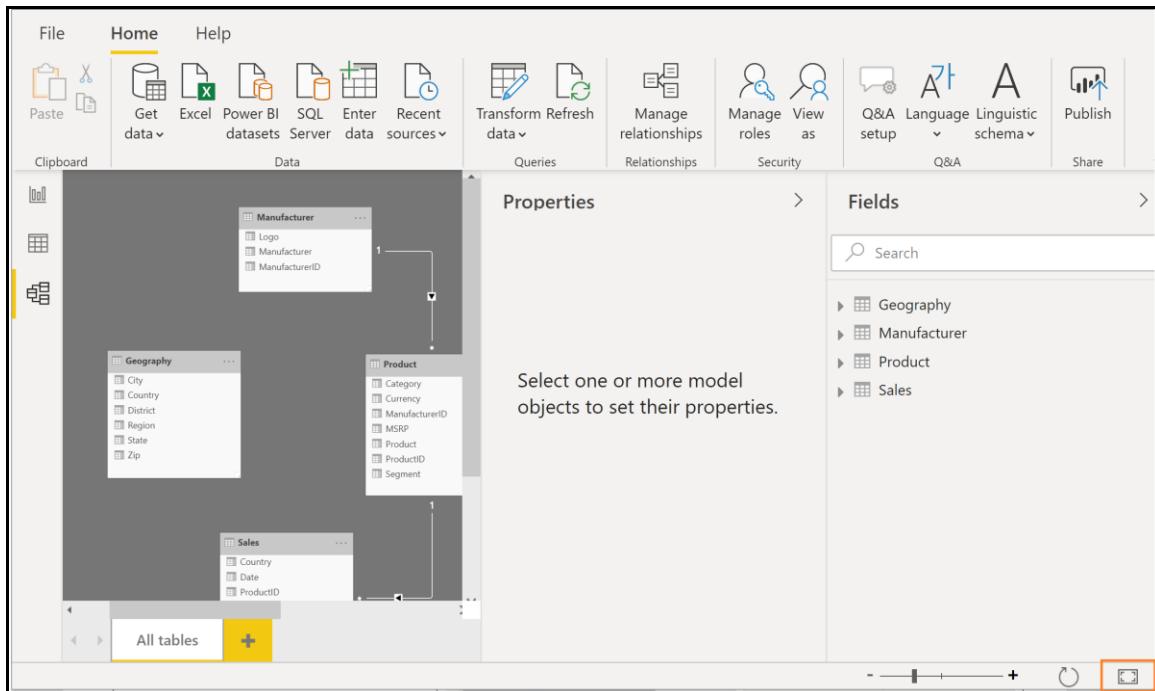
Power BI supports multiple types of relationships:

- 1 to many
- 1 to 1
- Many to many

In this lab, we will be using the 1 to many type of relationship, the most common type of relationship. This means one of the tables involved in the relationship should have a unique set of values. We will create additional relationships later in this lab.

Note: Tables may not appear as shown in the figure. You can zoom in and out of the **Relationships** page by dragging the zoom slider in the bottom right corner of the window. Also, if you want to ensure you are

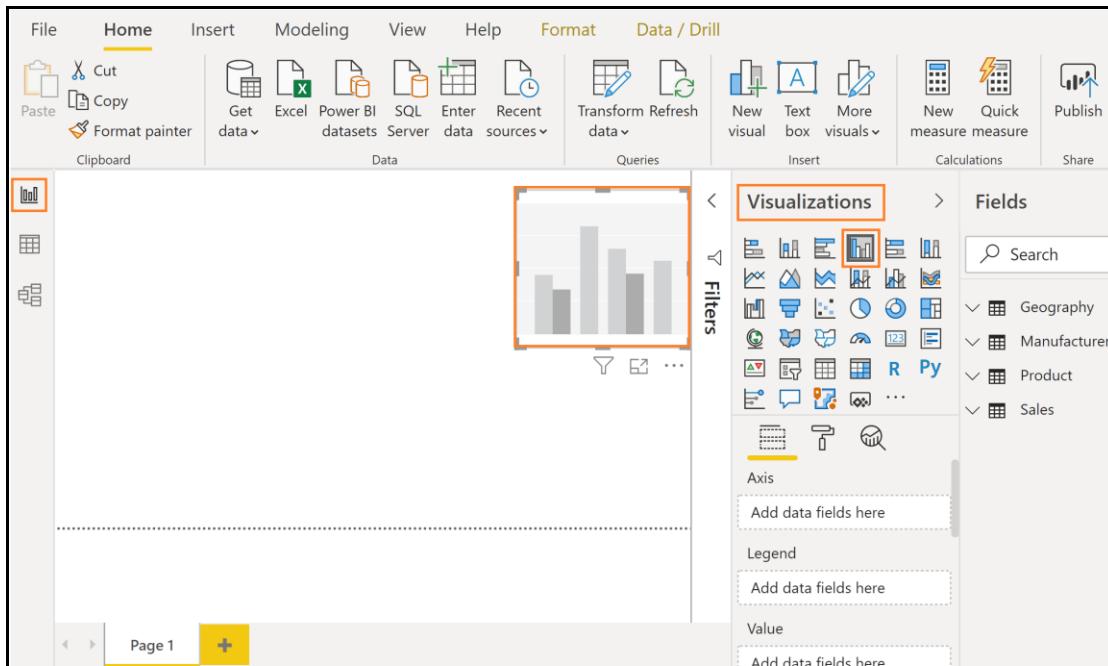
seeing all the tables, use the fit to screen icon: . Drag and move the tables to appear as shown in the figure:



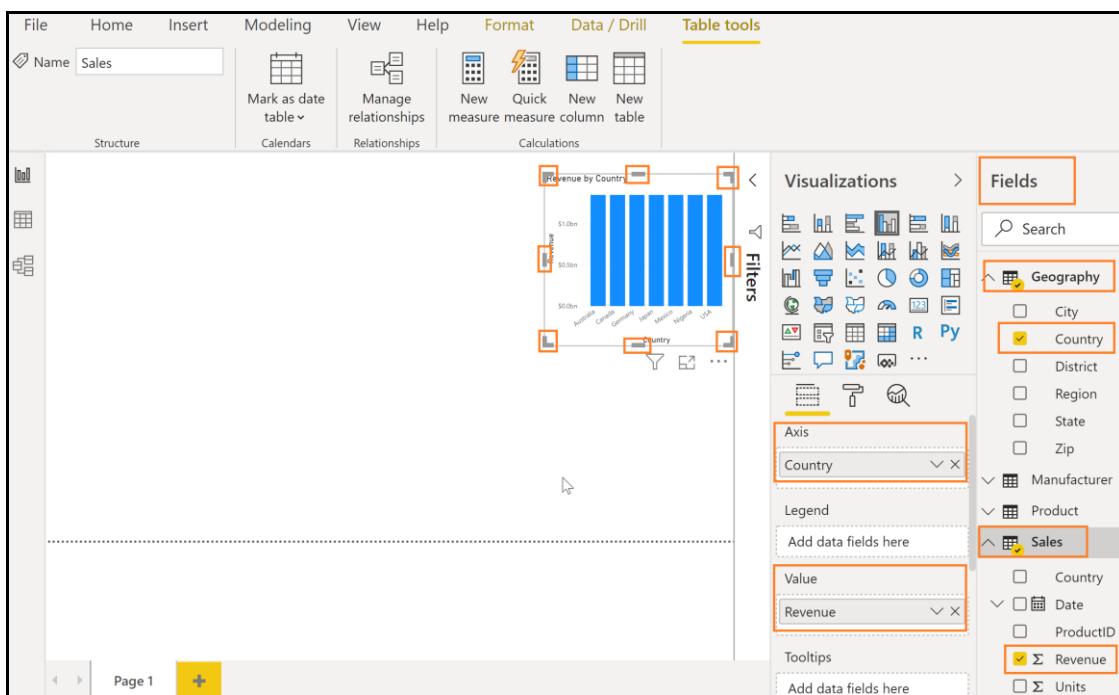
Power BI Desktop – Data Exploration

Now that we have loaded data, let's start with analyzing sales by country.

11. Click on the **Report** icon on the left panel to navigate to the Report view.
12. Click the **Clustered column chart** visual in **Visualizations** as shown in the screenshot.

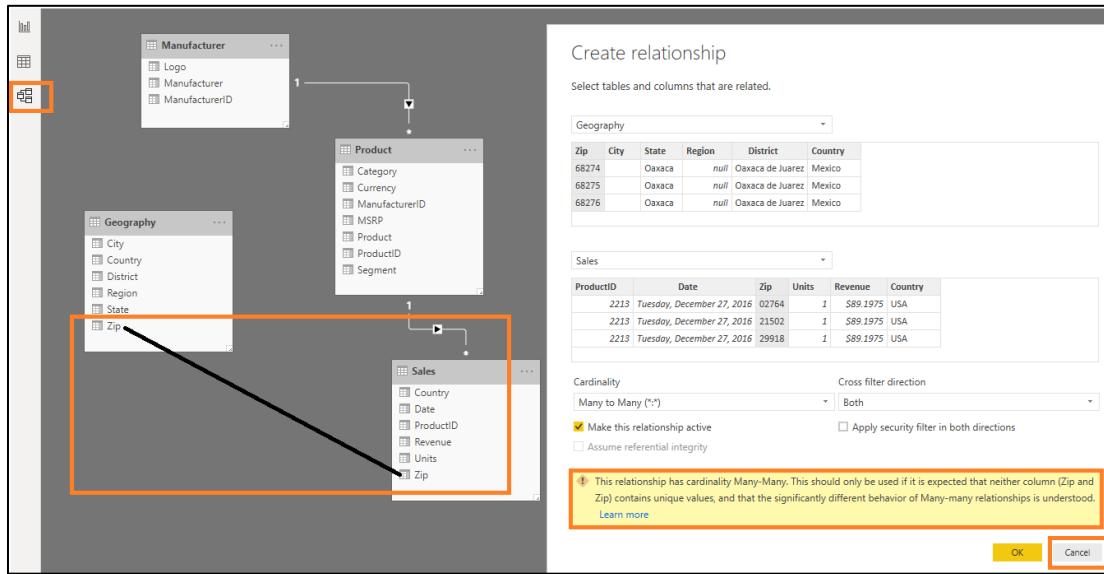


13. From the **Fields** section, expand the **Geography** table and then click the checkbox next to the **Country** field.
14. From the **Fields** section, expand the **Sales** table and then click the checkbox next to the **Revenue** field.
15. **Resize** the visual as needed by dragging the edges.



Notice that the revenue of each country is the same. Now we need to create a relationship between the Sales and Geography tables.

16. Click on the **Model** icon on the left panel to navigate to the Relationship view.
17. Our sales data is by Zip code, so we need to connect the **Zip** column from the **Sales** table with **Zip** column in the **Geography** table. You can do this by dragging the **Zip** field in the **Sales** table to connect the line with the **Zip** field in the **Geography** table.



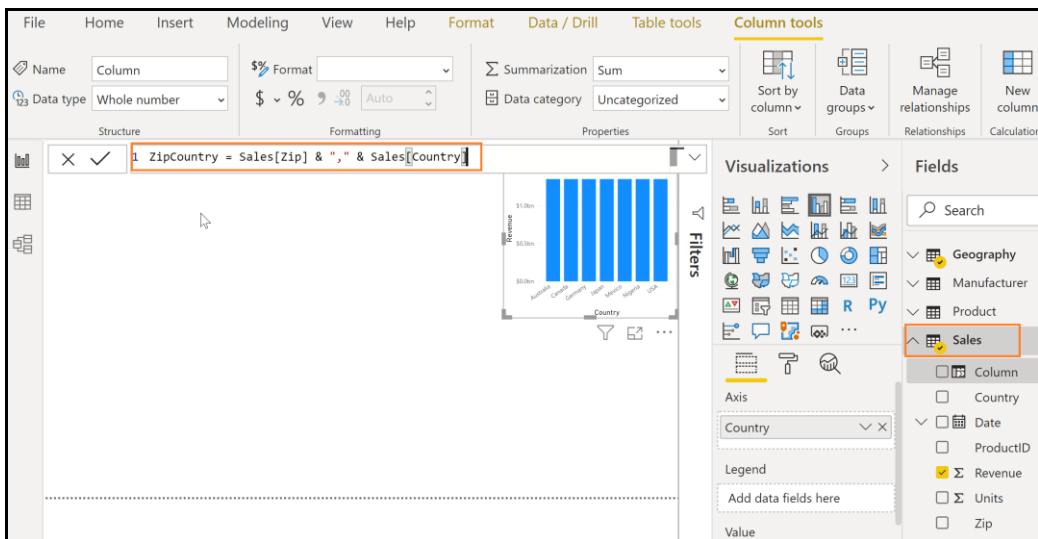
You will notice the **Create relationship** dialog opens with a warning message at the bottom stating the relationship has a many-many cardinality. The reason for the warning is that we don't have unique Zip values in the **Geography** table. This is because multiple countries could have the same Zip code. Let's concatenate the **Zip** and **Country** columns to create a unique value field.

18. Click Cancel in the Create relationship dialog box.

We need to create a new column in both the Geography table and the Sales table that combines the **Zip** and **Country** columns. Let's start by creating a new column in the Sales table.

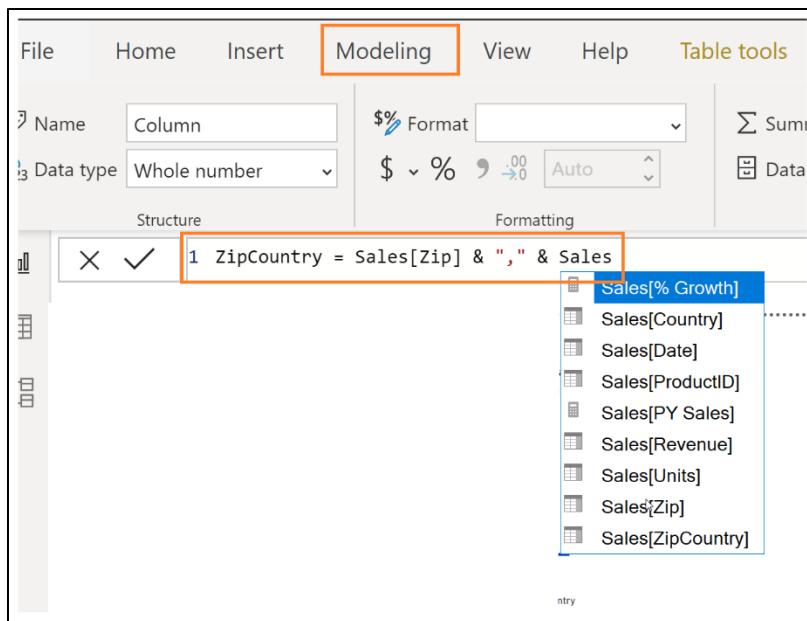
19. Click on the Report icon on the left panel to navigate to the Report view.

20. In the Fields section, click on the ellipse next to the Sales table. Click the New Column as shown in the figure. You will see a formula bar appear, as shown in the screenshot, to help create this new column.



21. Now we are ready to combine the Zip and Country columns into a new column called ZipCountry, separated by a comma. To create this column called **ZipCountry**, type the following calculation in the editor.

ZipCountry = Sales[Zip] & "," & Sales[Country]



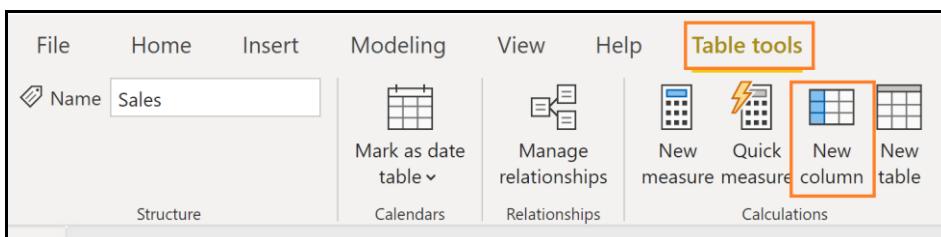
22. Once you are done entering the formula press **Enter** or click the checkmark on the left side of the formula bar.

You will notice that IntelliSense appears guiding you to choose the correct column. The language you used to create this new column is called Data Analysis Expression (DAX). We are connecting columns (Zip and Country) in each row by using the “&” symbol. The icon with an (fx), near the new column ZipCountry, indicates that you have a column containing an expression, also referred to as a calculated column.

IMPORTANT!

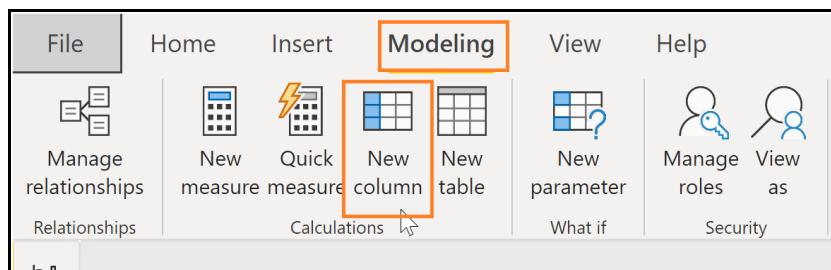
If you get an error creating a new column, make sure your Zip column is the Text Data Type.

Note: An alternative way to add a new column is by selecting the table, click **Table Tools**, click **New Column** or **Modeling**, and then click **New Column** from the ribbon.



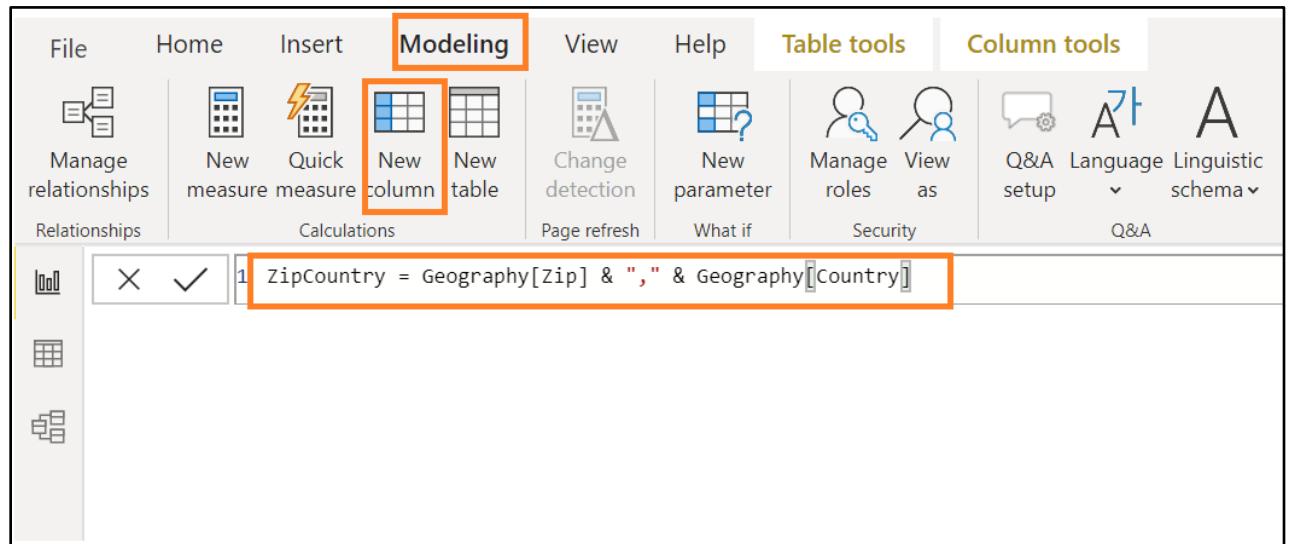
Let us use this method to create a **ZipCountry** column in the **Geography** table.

23. From the **Fields** section, click the **Geography** table, from the ribbon click **Modeling**, and then click **New Column** as shown in the figure.



24. A formula bar now appears. Enter the following DAX expression in the formula bar:

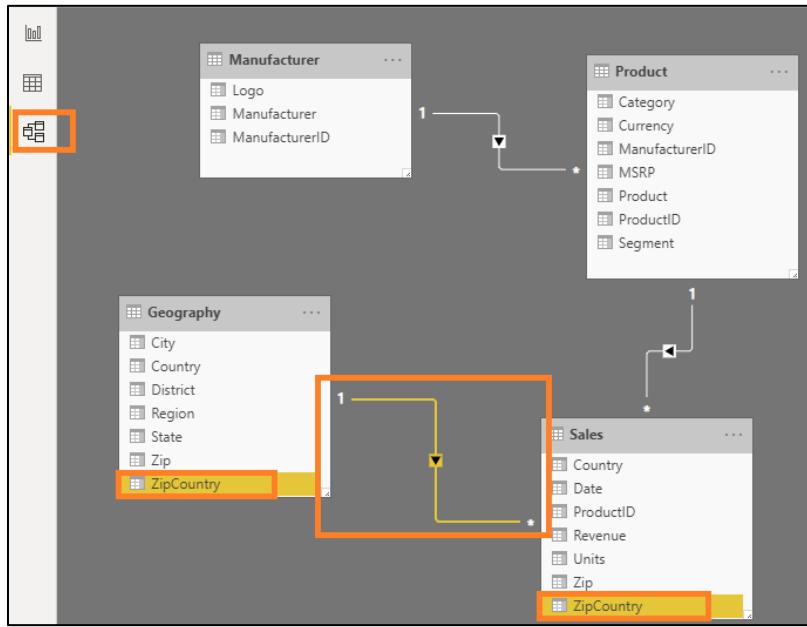
ZipCountry = Geography[Zip] & "," & Geography[Country]



You will see a new column, **ZipCountry**, in the **Geography** table. The final step is to set up the relationship between the two tables using the newly created **ZipCountry** columns in each of these tables.

25. Click on the **Model** icon on the left panel to navigate to the **Relationship** view.

26. Drag the **ZipCountry** field from the **Sales** table and connect it to the **ZipCountry** field in the **Geography** table.

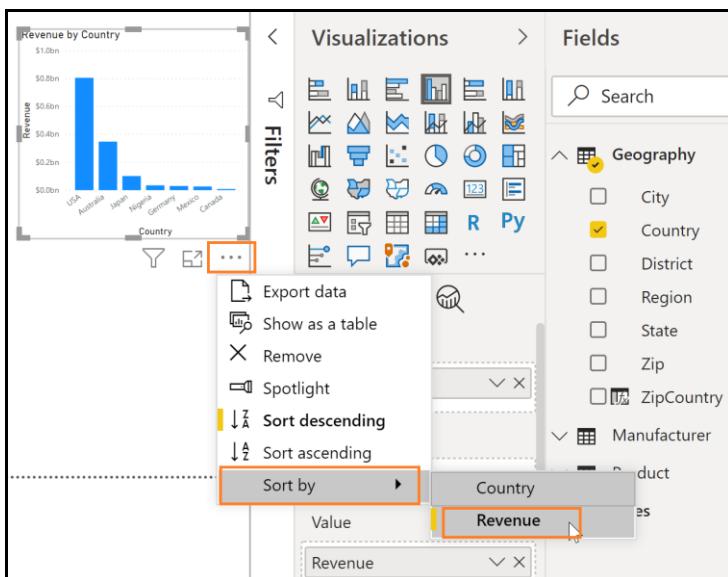


Now we have successfully created a relationship. The number “1” next to Geography indicates it is on the one side of the relationship and the “*” next to Sales indicates it is on the many side of the relationship.

27. Click on the **Report** icon on the left panel to navigate to the **Report** view.

Notice the clustered column chart that we created earlier. It shows different sales for each country or region. USA has the most sales, followed by Australia and Japan. By default, the chart is sorted by **Revenue**.

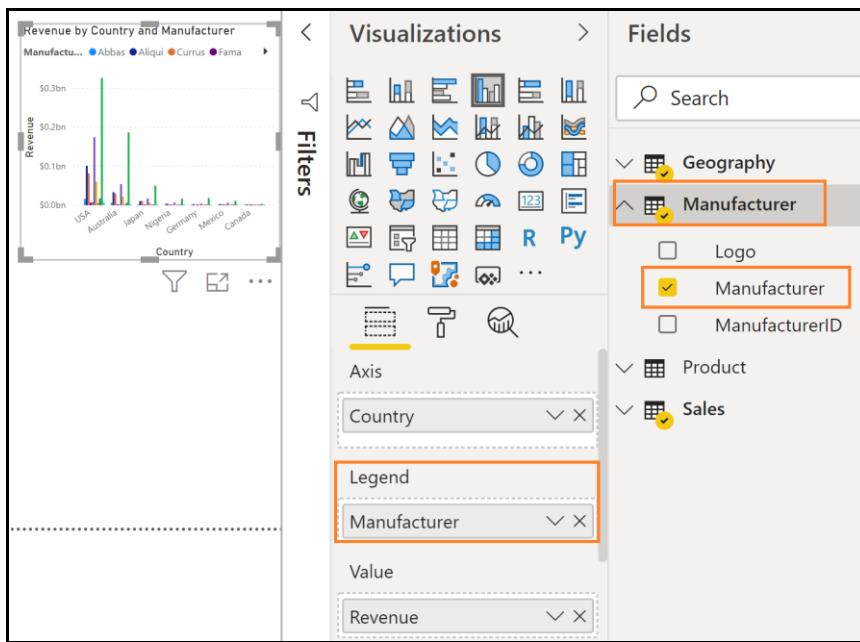
28. Click on the **ellipse** on the top right corner of the visual (alternatively, the ellipse may be at the bottom of the chart). Notice there is an option to Sort by **Country** as well.



29. From the **Fields** section, expand the **Manufacturer** table, and then drag the **Manufacturer** column to the **Legend** section under Visualizations.

30. While you have your chart selected, click the **Clustered column chart** from the **Visualizations** section, and then click the **Stacked column chart** visual.

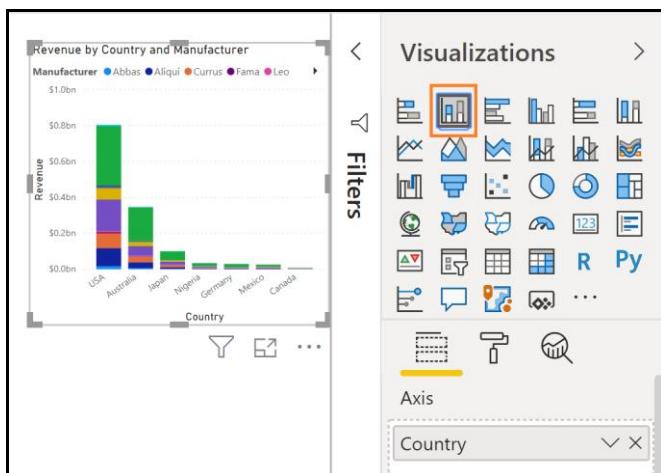
31. **Resize** the visual as needed.



Now we can see the top manufacturers by country.

Now let's try different visuals to see which chart represents the data the best.

32. Begin with the **Stacked column chart** selected.



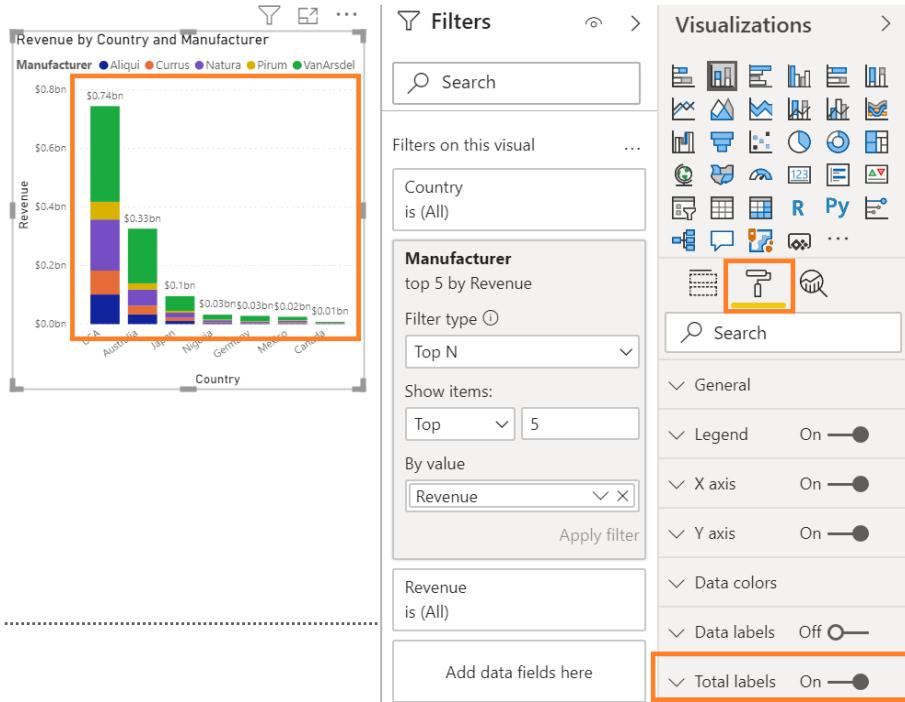
33. In the **Filters** pane, expand **Manufacturer**.
34. From the **Filter Type** dropdown menu, click **Top N**.
35. Enter **5** in the text box next to **Top**.
36. From the **Sales** table, drag and drop the **Revenue** field into the **By value** section.
37. Click on **Apply filter**.

The screenshot shows the Power BI 'Filters' pane on the left and the 'Fields' pane on the right. In the 'Filters' pane, under 'Manufacturer', it says 'top 5 by Revenue'. The 'Filter type' is set to 'Top N', 'Show items' is set to 'Top 5', and 'By value' is set to 'Revenue'. An 'Apply filter' button is at the bottom. In the 'Fields' pane, the 'Sales' table is expanded, and the 'Revenue' field is selected with a checked checkbox. Other fields like 'Country', 'Date', 'ProductID', 'Σ Revenue', 'Σ Units', 'Zip', and 'ZipCountry' are also listed but not selected.

Notice that the visual is filtered to display the top five manufacturers by Revenue. We see that the manufacturer VanArsdel has a higher percentage of sales in Australia compared to other countries or regions.

We can now add total labels to the stacked visuals

38. Click on the **paint roller** icon
39. Click Total labels to **On**



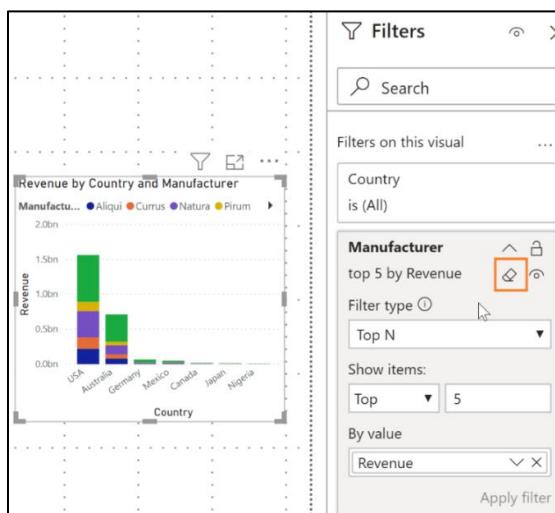
Let's remove the total labels

40. Click Total labels to the **Off** position

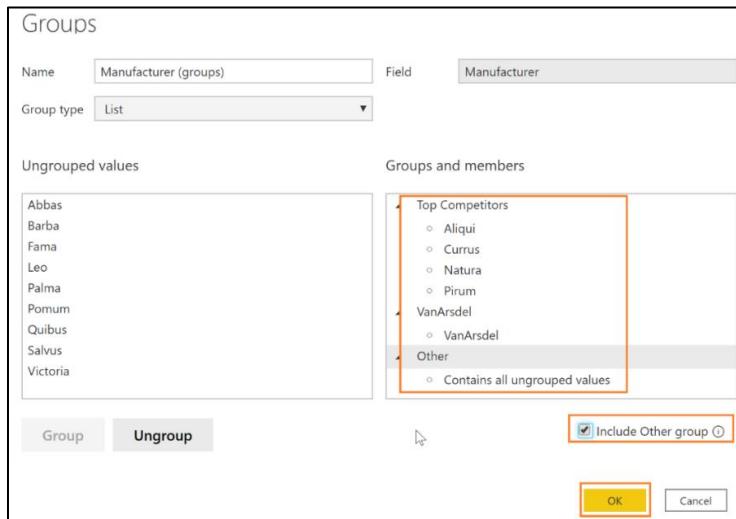
We are interested in the top five competitors by revenue. Let's group them so we don't have to add a filter to every visual. Before we do that, we'll remove the **Top 5** visual level filter.

41. Begin with **Clustered column chart** selected.

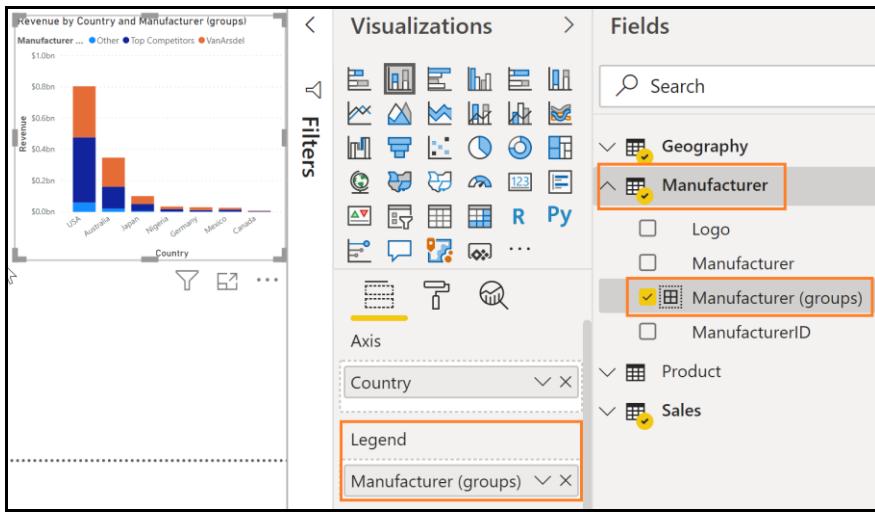
42. Hover over and click the **Clear filter** icon (erase) next to **Manufacturer** field in the **Filters** Pane.



43. From the **Fields** section, right-click on the **Manufacturer** field name from **Manufacturer** table. Note: do not check the checkbox.
44. Click **New Group**.
45. In the **Ungrouped values** section, using **Ctrl** key, click **Aliqui**, **Currus**, **Natura**, and **Pirum**.
46. Click the **Group** button. Notice a new group is added in the **Groups and members** section.
47. Double-click the newly created group and rename it **Top Competitors**.
48. Click **VanArsdel** from the **Ungrouped values** section and click the **Group** button to create the **VanArsdel** group.
49. Click the checkbox **Include Other group**. This will create another **Other** group that includes all the other manufacturers.
50. Click **OK** to close the **Groups** dialog.



51. With the **Stacked column chart** selected, click on the X next to **Manufacturer** in the **Legend** section. This will remove the Manufacturer.
52. From the **Fields** section, drag the newly created **Manufacturer (groups)** to the **Legend** section. Now we can see that VanArsdel has nearly 50% share in Australia.

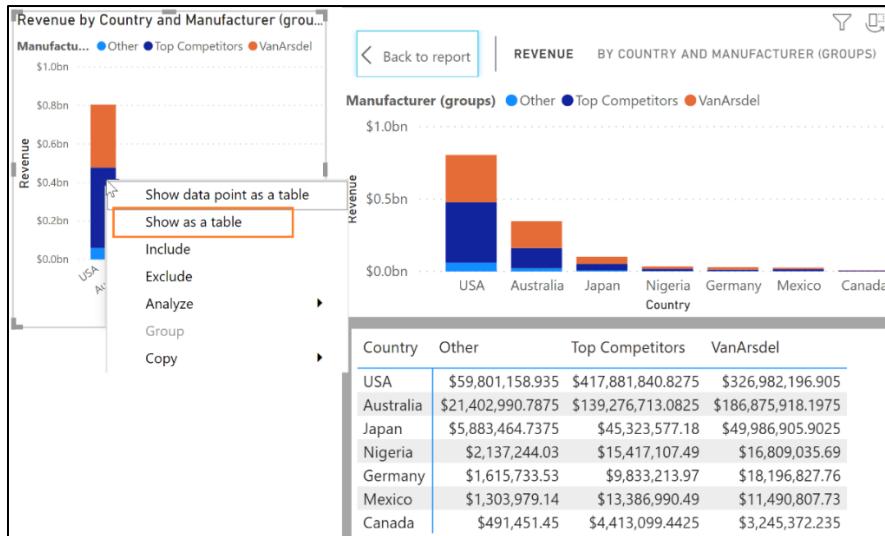


53. Hover over one of the columns and right-click.

54. Click **Show as a table**. You will now be in **Focus** mode with the chart displayed on top and the data displayed below. Notice that VanArsdel has a large percent of the Australian market.

55. Use the icon in the top right corner to switch to the vertical layout. In this layout, you view the chart on the left panel and the data on the right panel.

56. Click **Back to Report** to go back to the **Report** canvas.



Note: You can use similar steps to **Show data point as a table** to see records for a specific data point.

Now let's create a Revenue by Manufacturer visual.

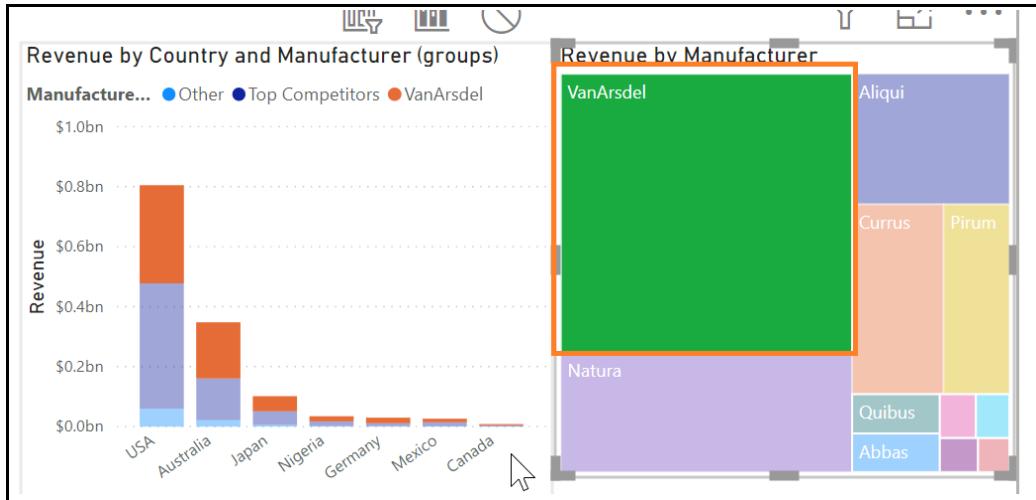
57. Click on the white space in the canvas. From the **Fields** section, click the checkbox next to the **Revenue** field in the **Sales** table.

58. From the **Fields** section, click the checkbox next to the **Manufacturer** field in the **Manufacturer** table.
59. From the **Visualizations** section, click the **Treemap** visual.

The screenshot shows the Power BI Studio interface. On the right, the **Fields** pane is open, displaying the **Manufacturer** table. Under the **Sales** group, the **Revenue** field has a checked checkbox. On the left, the **Visualizations** pane shows a **Treemap** visual titled "Revenue by Manufacturer". The treemap is divided into several colored segments representing different manufacturers: VanArdel (green), Aliqui (blue), Curus (orange), Pirum (yellow), Quibus (teal), Abbas (light blue), and Natura (purple). The segments are labeled with their respective manufacturer names.

We now have Revenue by Manufacturer. Now let's turn our attention to the interaction between the Stacked column chart and the Treemap visuals.

60. In the **Treemap**, click **VanArdel** and notice that the Stacked column chart is filtered. This confirms that VanArdel has a large percentage of the Australian market.



61. To remove the filter, click **VanArdel** again.

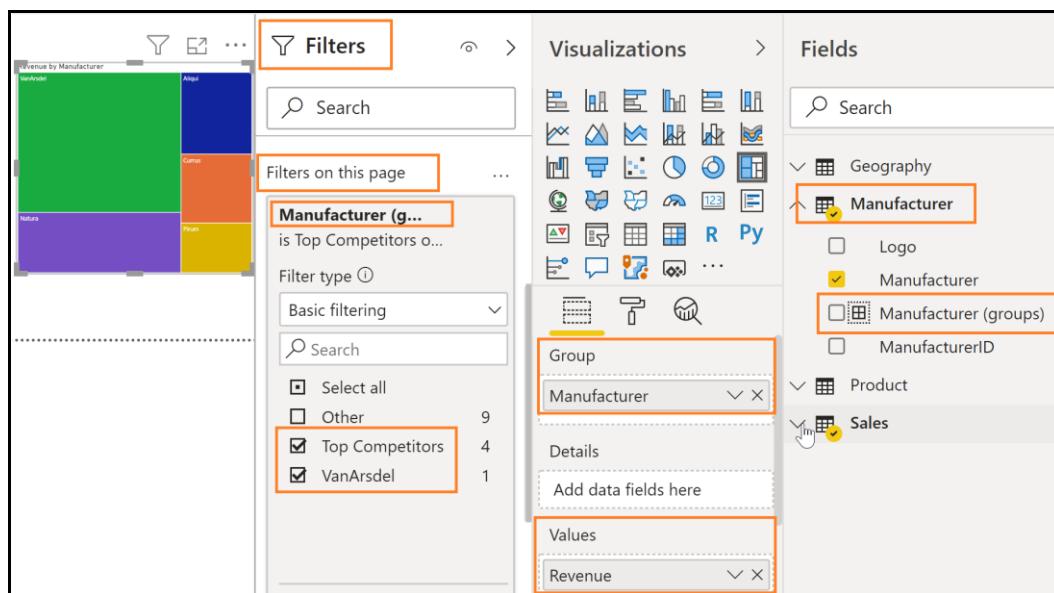
This interaction between visuals is called cross-filtering.

Previously, we added a Top 5 Visual level filter. Now let's add a filter to the Page level, so we are working with the Top Competitors and VanArsdel and filter out the other manufacturers.

Page-level filters apply to all visuals on the page. Visual-level filters apply only to a visual. Ensure the Filters pane is expanded/open.

62. From the **Fields** section, drag **Manufacturer (groups)** from the **Manufacturer** table to the **Filters on this page** box in the **Filters Pane**.

63. Click **Top Competitors** and **VanArsdel**.

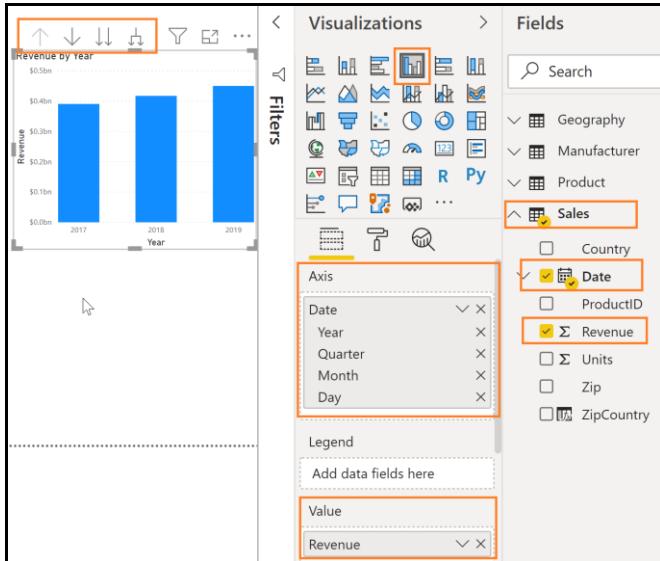


Now, let's add a visual that provides sales information over time

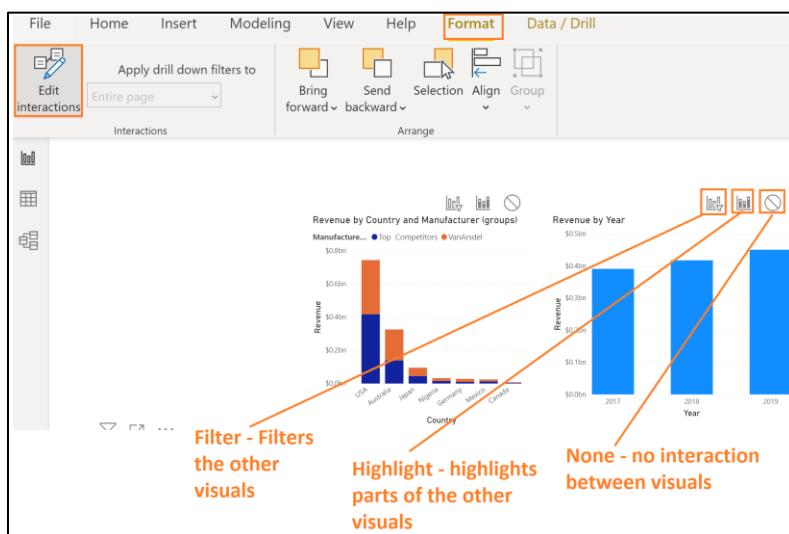
64. Begin by clicking on the white space in the canvas.

65. Click the checkbox next to the **Date** field in the **Sales** table. Notice that a Date Hierarchy is created.

66. Click the checkbox next to the **Revenue** in the **Sales** table field. Notice that a Clustered column chart is created. Also notice in the **Axis** section, a date hierarchy is created. There are arrows on the top bar of the chart which are used to navigate through the hierarchy.



67. Click on the **Australia** column in the **Revenue by Country** visual.
68. With the **Revenue by Country** visual selected, from the ribbon click on **Format**, and then click **Edit Interactions**. Notice on the top right of the other two visuals new icons with the highlight icon selected.
69. Click the **filter icon** for both visuals.



Notice now in both Revenue by Year and Revenue by Manufacturer, data is filtered for Australia

70. Now click the **Revenue by Year** visual.
71. Next, click the **filter icon** on the other two visuals.

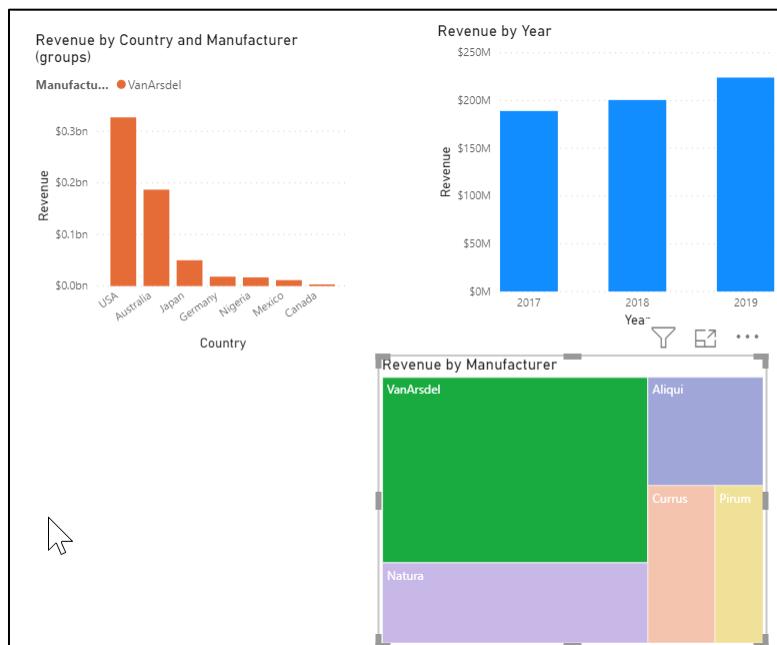


72. Similarly, click on the **Revenue by Manufacturer** visual and click the **filter icon** on the other **two visuals**. Once you are done, all the visuals should be in filter mode.

73. With the **Revenue by Manufacturer** visual selected, from the ribbon click **Format** then **Edit Interactions** to remove the icons.

74. Click on VanArsdel in the Revenue by Manufacturer visual

Note: If your screen doesn't look like the one below please edit your interactions.



We have already noticed that VanArsdel has a large share of the market in Australia. Let's see how VanArsdel has done over time in Australia.

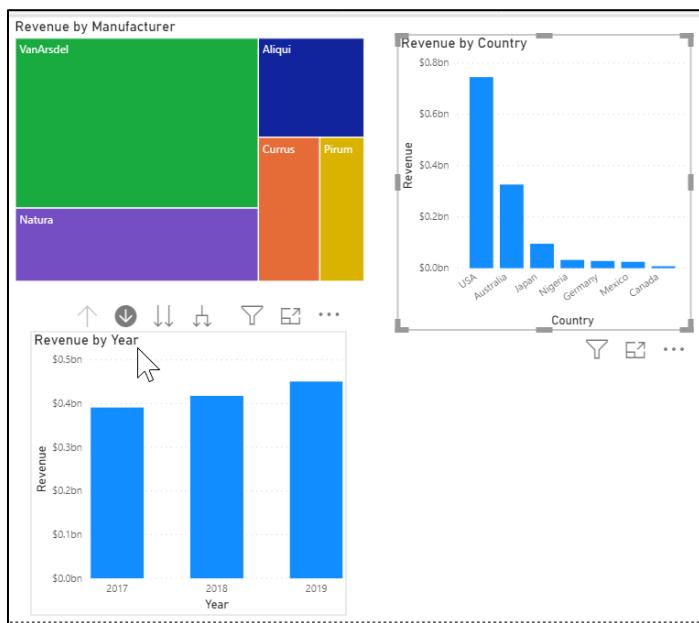
75. Click on the **Revenue by Country and Manufacturer (groups)** chart and remove **Manufacturer (groups)** from the legend.

76. Click on **VanArsdel** in the **Revenue by Manufacturer** visual.

77. **Ctrl+Click** the **Australia** column in the **Revenue by Country** visual.

Now we have filtered the charts by both VanArsdel and Australia. Looking at the results, we can see a spike in 2019 sales for VanArsdel in Australia. This spike in sales is intriguing, so let's investigate further.

78. Click the down arrow on the top of the **Revenue by Year** visual. This enables drill-down capability.



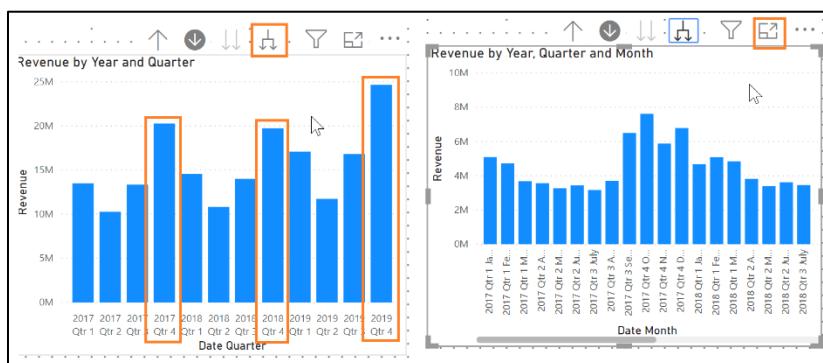
79. Click the **2019** column in the **Revenue by Year** visual.

Notice that you have drilled down to the quarter level of 2019. There was a big spike in the fourth quarter. Let's dig further.

80. Click on the double arrow icon on the top of the **Revenue by Year** visual. This drills down to the next level of the hierarchy, which is the month.



81. Click on the up-arrow icon on the top of the **Revenue by Year** visual to drill up to the **Quarter** level.
 82. Click on the drill up icon again to go up to the **Year** level
 83. Click on the split arrow icon on the top right of the **Revenue by Year** visual. This expands down to the next level of the hierarchy, which is quarters for all the years.
- Notice that the fourth-quarter sales have always been high, but in 2019 there was a larger sales spike in the fourth quarter than usual.
84. Now let's expand down to the month level. Click on the split arrow icon on the top right of the **Revenue by Year** visual. This expands down to the next level of the hierarchy, which is months for all the years.



There is a lot of information in the visual and we must scroll left and right to compare.

Power BI Desktop – Data Exploration Continued

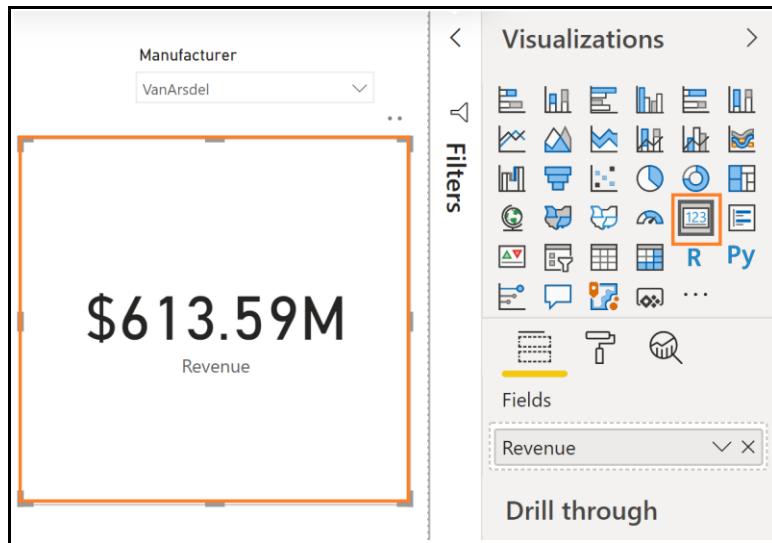
Now that we've explored the data, let's add a slicer so we can filter by the manufacturers.

85. Click on the white space in the canvas. From the **Fields** section, click the checkbox next to the **Manufacturer** field in the **Manufacturer** table.
86. From the **Visualizations** section, click on the **Slicer** visual.
87. Here you will see a list of Manufacturers. Click **VanArsdel** and notice that all the visuals are filtered based on your selection.
88. Hover over the top right corner of the visual and click on the down arrow. Notice you have the option to change the slicer from a list to a dropdown.
89. Click **Dropdown**.
90. Click **VanArsdel** from the dropdown.

The screenshot shows the Power BI desktop interface with three main panes:

- Visualizations pane:** Shows a Slicer visual with a dropdown filter set to "Manufacturer". The dropdown menu is open, showing options: List and Dropdown. The "Dropdown" option is highlighted with a red box.
- Fields pane:** Shows the "Manufacturer" table structure. Under the "Manufacturer" column, the "Manufacturer" field is selected and checked, indicated by a yellow box around the checkbox and the field name.
- Filters pane:** Shows filters applied across all pages. It includes a section for "Manufacturer (groups)" where "TopCompetitors" and "VanArsdel" are selected. A red box highlights the "Filters on all pages" section.

91. Confirm **Top Competitors** and **VanArsdel** are selected in the **Manufacturer (groups)** filter in the **Filters** pane.
92. In the drop down filter select **VanArsdel**
- Note that there is a box for **Filters on all pages** in the **Filters** pane. If you have duplicate pages, this is how you sync a filter for the whole file.
- Now let's use the **Manufacturer** slicer to analyze one manufacturer at a time.
93. Begin by clicking on the **Revenue by Manufacturer Treemap** visual.
94. From the **Visualizations** section, click on the **Card** visual.



The card visual gives us the Revenue as we filter and cross-filter the visuals.

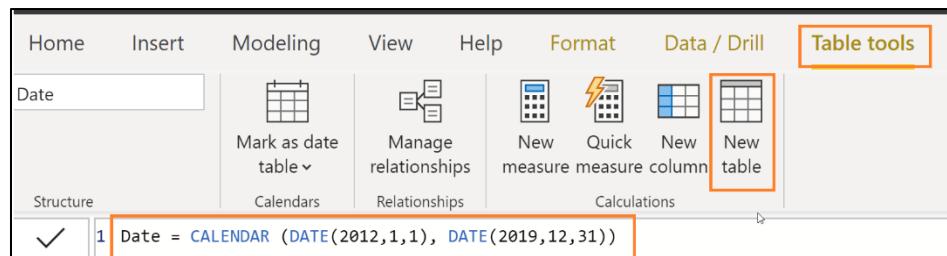
Notice that all key dimensions are in their table with related attributes, except the date. For example, **Product** attributes are in the **Product** table. Now let's create a **Date** table.

95. Navigate to the **Data** view by clicking on the **Data** icon in the left panel.

96. From the ribbon, click on **Table Tools**, then click on **New Table**.

Notice that a new table is created in the **Fields** section on the right and that the formula bar opens.

97. Enter **Date =CALENDAR (DATE(2012,1,1), DATE(2019,12,31))** in the formula bar and click on the checkmark. A **Date** table with a **Date** column is created.



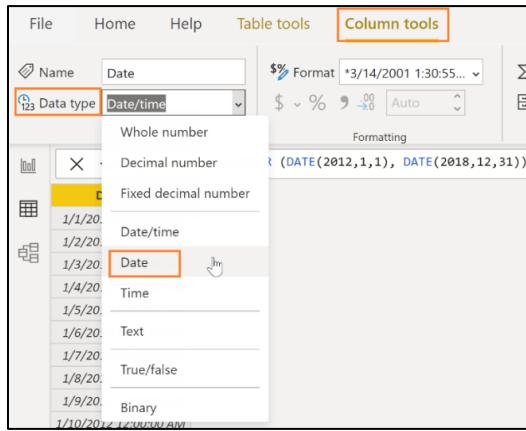
We are using two DAX functions: the **CALENDAR** function, which takes the start and end data, and the **DATE** function, which takes the **year**, **month**, and **date** Fields.

For this lab, we will create Dates from 2012 to 2019, since we have data for those years. We can also add more Fields, like **Year**, **Month**, **Week**, etc., to this table by using DAX functions.

Notice that the **Date** field is of the type **Date/Time**. Let's change it to the **Date** data type.

98. Click on the **Date** field in the **Date** table.

99. From the ribbon, click **Column Tools**, click **Data type**, and then click **Date**.



Next, we need to create a relationship between the newly created **Date** table and the **Sales** table.

100. From the ribbon, click **Column Tools**, and then click **Manage Relationships**.

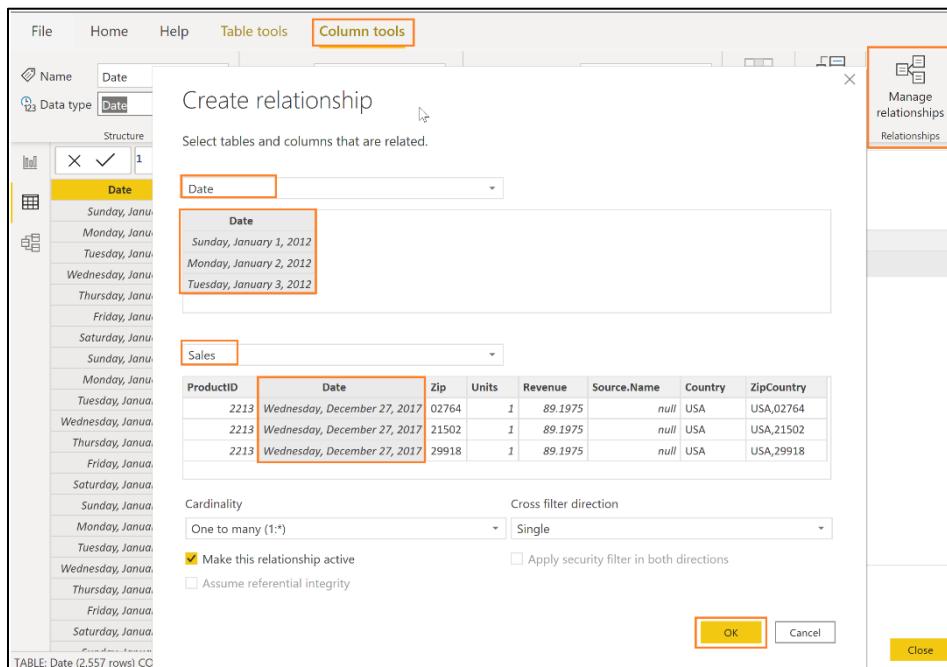
101. A **Manage Relationships** dialog box opens. Click the **New** button.

102. A **Create Relationship** dialog box opens. Click **Date** from the top dropdown menu.

103. Click **Sales** from the second dropdown menu.

104. Highlight the **Date** Field in both tables.

105. Click **OK** to close the **Create relationship** dialog box.



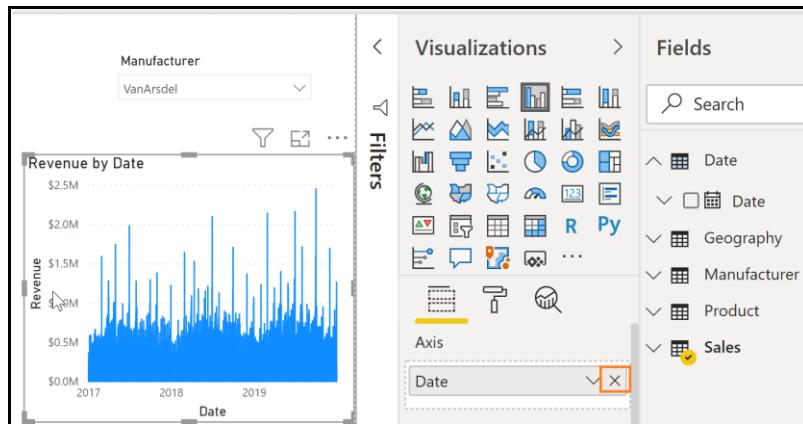
106. Click **Close** to close the **Manage relationships** dialog box.

107. Navigate to the Report view by clicking on the **Report** icon in the left panel.

Notice that the Revenue by Date chart looks different. Let's fix it.

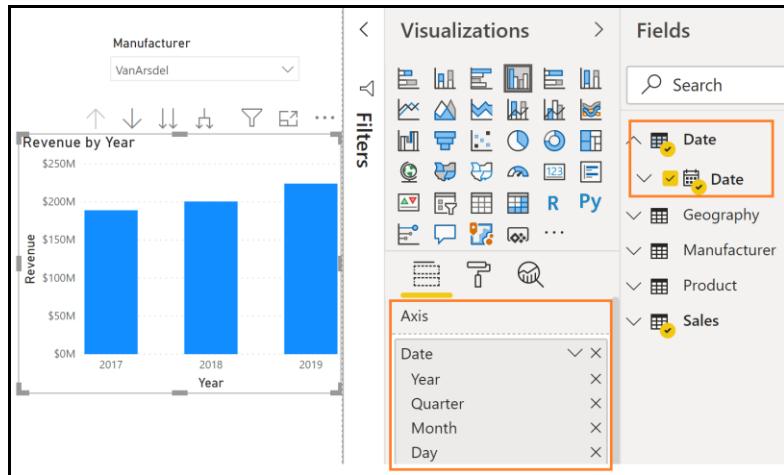
108. Click the **Revenue by Date** visual.

109. From the **Axis**, click on the "X" to remove the **Date** field.



110. From the **Fields** section, expand the **Date** table.

111. Now drag the **Date** field to the **Axis** section.

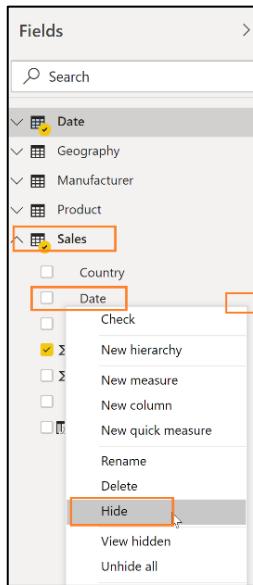


Notice that the new **Date** field behavior is like it was previously.

Since there are now two Date Fields, it may be confusing to know which one to use. To accommodate this, let's hide the **Date** field in the **Sales** table.

112. From the **Fields** section, click on the **ellipsis** next to the **Date** field in the **Sales** table.

113. Click **Hide** to hide the **Date** field in the reports view. We have the option to view hidden fields and unhide fields as needed.



114. In the same way, hide **Country**, **ProductID**, **Zip**, and **ZipCountry** in the **Sales** table as well.

115. Now hide **ZipCountry** from the **Geography** table.

116. Hide **ManufacturerID** from **Manufacturer** table.

117. Hide **ProductID** and **ManufacturerID** from **Product** table.

Tip: It is a best practice to hide unused Fields in reports.

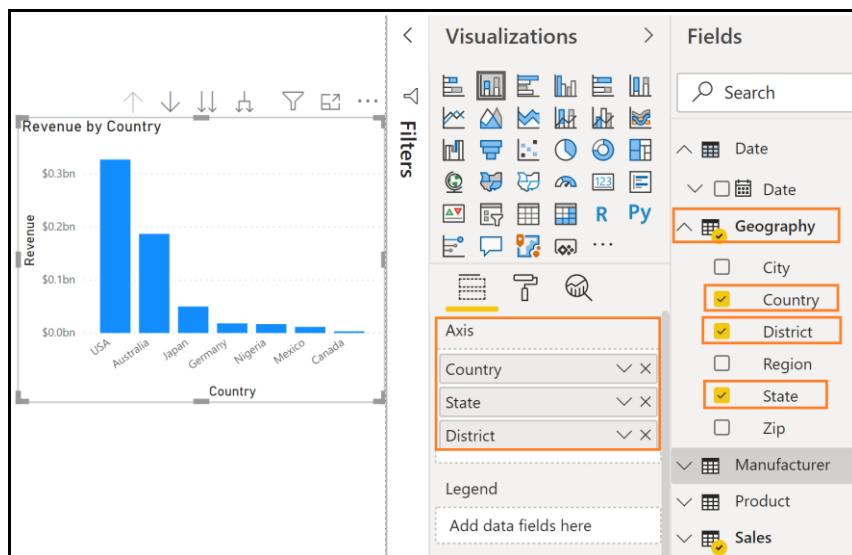
Now let's get back to our data story, Australia, VanArsdel and 2019. Let's check if the spike occurred in a specific region in Australia.

118. Click the **Revenue by Country** visual.

119. From the **Fields** section, drag the **State** field from the **Geography** table to below the **Country** field in the **Axis** section.

120. Drag the **District** field to below the **State** field in the **Axis** section.

We have just created a hierarchy.



121. Make sure that **VanArsdel** is selected in the **Manufacturer** slicer.

122. Enable **Drill mode** by clicking the down arrow of the **Revenue by Country** visual.



123. Click **Australia** to drill down to the **State** level.

124. From the **Revenue by Year** visual click **2019** and notice what happens to the **Revenue by Country** and the **State** visual.

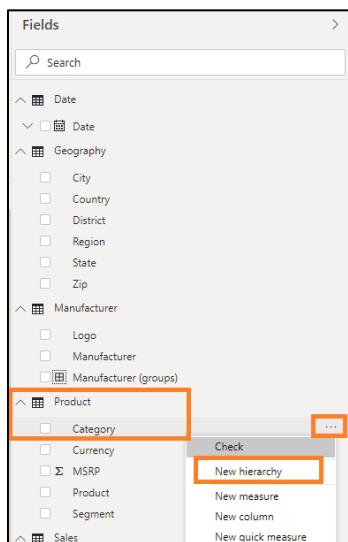
125. Now, **Drill up** to the **country** level.

126. Disable drill mode by clicking the down arrow again.

Now let's analyze the data by product. We'll start by creating a product hierarchy.

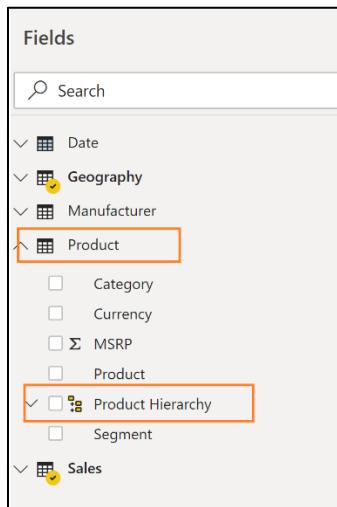
127. From the **Fields** section, click on the **ellipsis** next to the **Category** field in the **Product** table.

128. Click **New Hierarchy**.



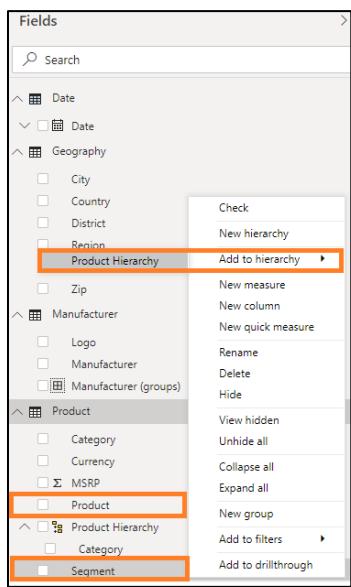
Notice that a new field called **Category Hierarchy** is created in the **Product** table.

129. Double-click **Category Hierarchy** and rename it to **Product Hierarchy**.



130. Click the ellipse next to **Segment**.

131. Click **Add to Hierarchy**, and then click **Product Hierarchy**.

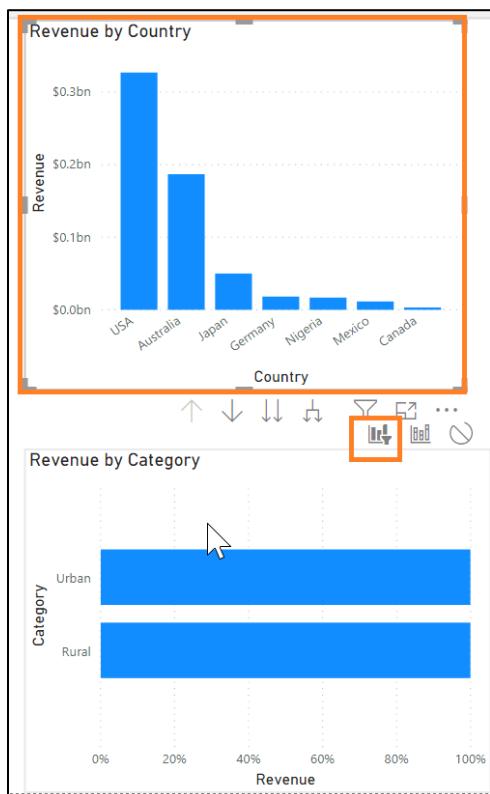


132. Click the ellipse next to **Product**.

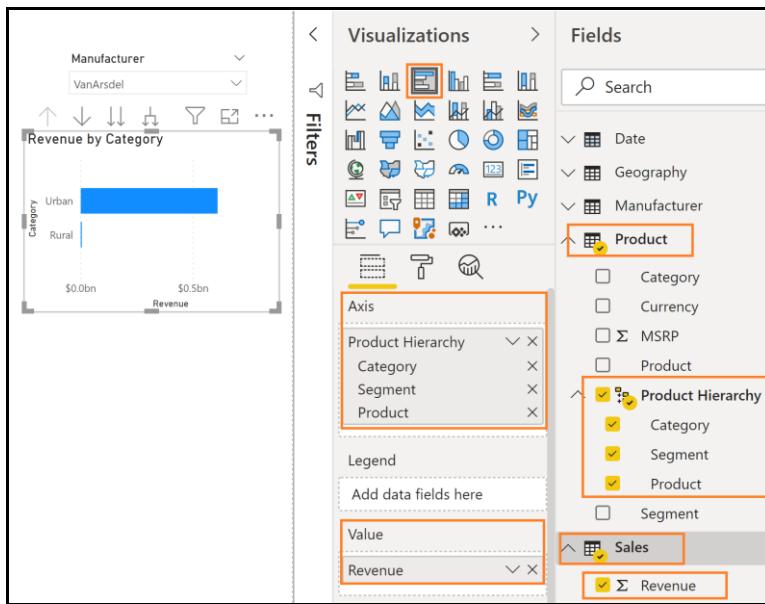
133. Click **Add to Hierarchy**, and then click **Product Hierarchy**.

We have now created a Product Hierarchy with the priority of Category, Segment, and then Product.

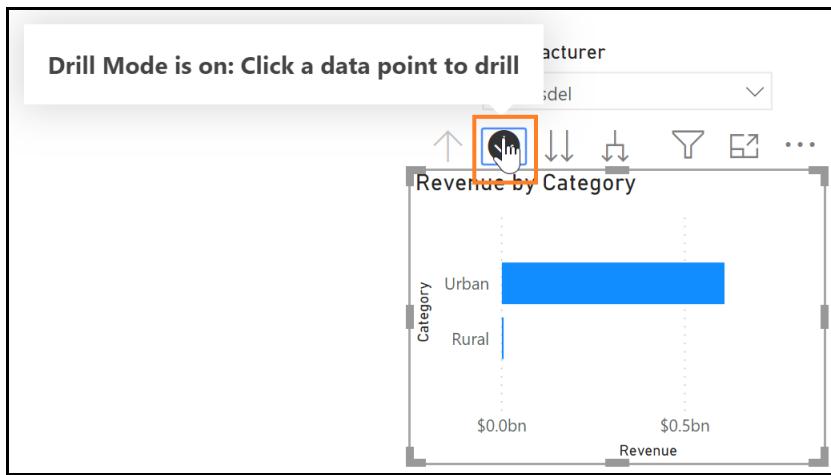
134. Click on the white space in the canvas. From the **Visualizations** section, click **Clustered bar chart**.
135. From the **Fields** section, expand the **Product** table.
136. Click the checkbox next to the **Product Hierarchy**. Notice the complete hierarchy is selected.
137. From the **Fields** section, expand the **Sales** table.
138. Click the checkbox next to the **Revenue** field.
139. Ensure **Australia** and **2019** are selected.
140. Let's edit interactions for the new chart.
141. Click the Format tab and click edit interactions
142. Click on the **Revenue by Country** visual and change the **Revenue by Country** visual to **filter**



143. Do the same thing with the **Revenue by Year** visual, change the interaction of the **Revenue by Category** to **filter**
144. We also need to change the interactions of the other charts. Click on the Revenue by **Category** visual and change the **Revenue by Year** visual to a **filter** action.
145. Click the **filter** interaction on the **Revenue by Country** visual as well
146. Click the **format** tab and click **Edit interactions** to turn it off
147. Let's get back to the **Revenue by Category** visual

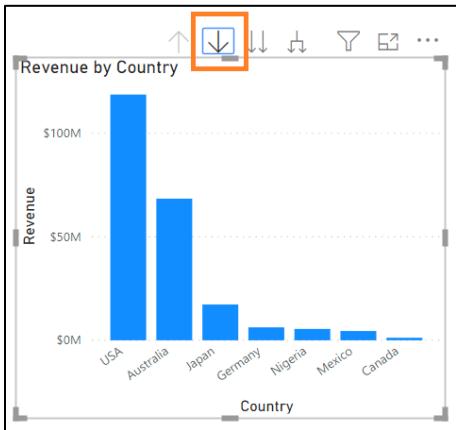


148. Enable drill-down mode in the **Revenue by Category** chart by clicking on the down arrow.



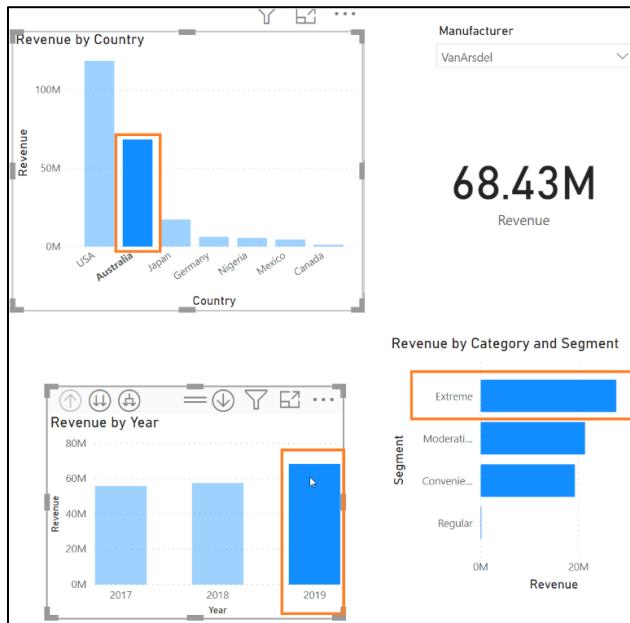
149. Click on **Urban**.

150. In the **Revenue by Country** visual, drill up to Country level **Australia** and disable drill down



151. Click **Australia** in the **Revenue by Country** visual

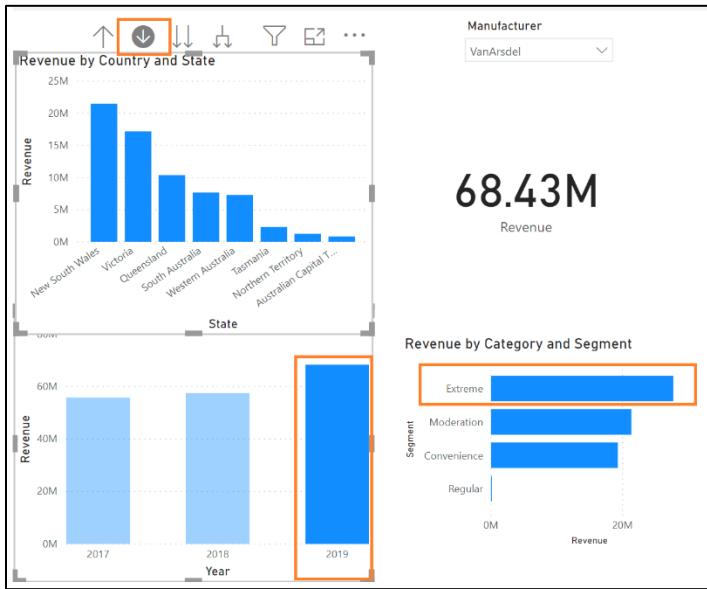
152. **Ctrl+Click 2019** from the Revenue by Year visual. Notice that the sales in the **Extreme** category are higher than the **Convenience** and **Moderation** segments.



Let's investigate further...

153. Click the down arrow at the top of **Revenue by Country** visual to enable the drill model.

154. Click **Australia** to drill down to the **State** level.



155. Click **2019** in the Revenue by Year visual.

156. **Ctrl+Click** the **Extreme** Segment in the Revenue by Category and Segment visual.

Notice that there is no significant spike by State.

157. Click **Extreme** again to remove cross-filtering between the visuals.

158. **Drill up** to the **Category level** in the Revenue by Category visual.

159. Disable drill mode by clicking the down arrow again.

160. **Drill up** to **Country** in the Revenue by Country and State visual

161. Disable drill mode in the Revenue by Country visual

Now let's add a Matrix visual so we can view the data in rows and columns. We can apply conditional formatting to the matrix visual to highlight the outliers.

162. Click on the **Revenue by Category** clustered bar chart and change it to a **Matrix** visual.

The screenshot shows the Power BI desktop interface. On the left, there is a table visualization titled "Manufacturer" with a dropdown filter set to "VanArdsel". The table has columns "Category" and "Revenue". It shows three rows: "Urban" with \$608,280,419.375, "Rural" with \$5,306,645.045, and a "Total" row with \$613,587,064.42. The "Urban" row is highlighted with an orange border. On the right, the "Visualizations" pane is open, displaying various chart and report icons. Below it, the "Rows" section shows a hierarchy named "Product Hierarchy" with levels "Category", "Segment", and "Product", each with a delete icon.

163. Click the + (plus sign) next to the **Urban** row to drill down.

This screenshot shows the same table visualization as above, but the "Urban" row now has a plus sign (+) to its left, indicating it has been expanded. The other rows ("Rural" and "Total") remain unchanged.

Category	Revenue
+ Urban	\$608,280,419.375
+ Rural	\$5,306,645.045
Total	\$613,587,064.42

Let's add a percent of the total field. This will give us a better perspective.

164. Navigate away from the **Format** section to the **Fields** pane.

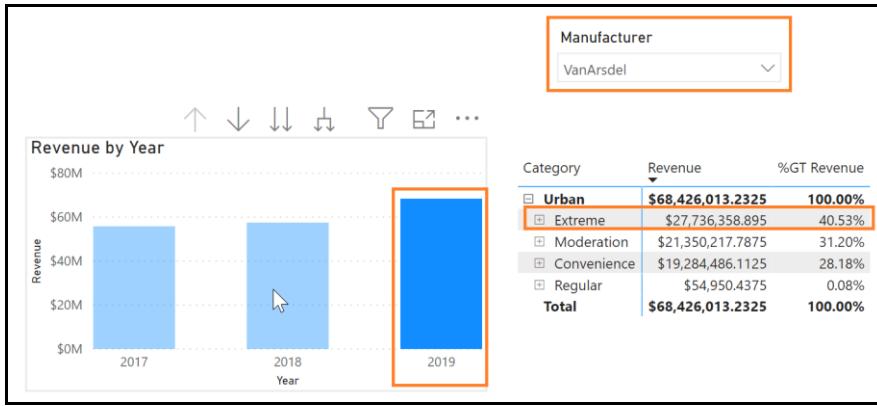
165. From the **Fields** section, drag the **Revenue** field from the **Sales** table to below the existing **Revenue** field in the **Values** section. It will look like you have Revenue twice in the fields pane

The screenshot shows the Power BI Data View interface. On the left is a table visual titled "Manufacturer" with a dropdown filter set to "VanArsdel". The table has columns "Category" and "Revenue". The data includes categories like Urban, Convenience, Moderation, Extreme, Regular, and Rural, along with a Total row. The Revenue values are identical for all rows: \$608,280,419.375. On the right is the "Fields" pane. Under "Visualizations", there's a grid of icons. Under "Fields", there's a search bar and a tree view of fields categorized by Date, Geography, Manufacturer, Product, and Sales. The "Sales" node is expanded, showing "Revenue" and "Units". The "Revenue" field under "Sales" has a checked checkbox next to it. Below the tree view are sections for "Rows", "Columns", and "Values", each containing "Revenue" with a dropdown arrow.

166. Click the **arrow** next to the newly added **Revenue** field.
167. From the menu, hover over **Show value as** and then click **Percent of grand total**.
168. Drill up to **Category** levelEnable drill mode on the **Revenue by Category** visual
169. Now click on **Urban** (the word, not the + sign)

The screenshot shows the Power BI Data View interface with a table visual. The table has the same structure as the previous screenshot, with "Revenue" values of \$608,280,419.375 for all categories. A context menu is open over the "Revenue" value in the "Extreme" category row. The menu is titled "Show value as" and contains options: "No calculation", "Percent of grand total" (which is checked), "Percent of column total", and "Percent of row total". The "Percent of grand total" option is highlighted with an orange box. To the left of the table, the "Fields" pane is visible, showing the "Sales" node expanded with "Revenue" selected.

170. Make sure you have **Australia** and **2019** selected on the other charts.
- Now let's look at the **Extreme** category for Australia over time.



171. In the **Revenue by Year** visual click the **2019** column and click **Australia** in the **Revenue by Country** visual. Notice that the **Extreme** segment has around 40% of the grand total.

172. In the **Revenue by Year** visual click the **2019** column to remove the filter.

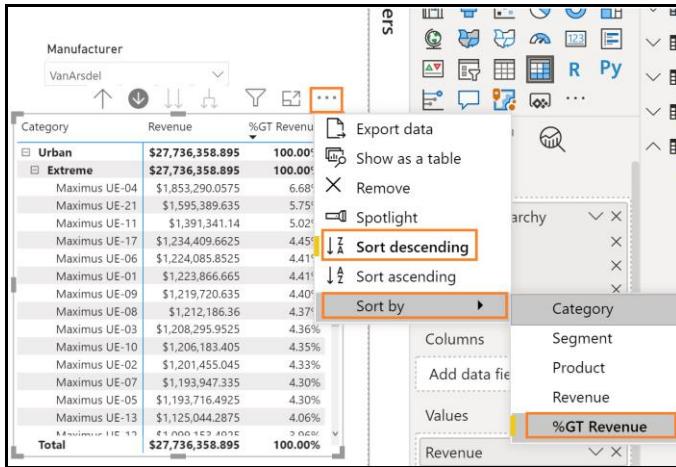
Now let's drill down into the **Extreme Segment** and figure out if a Product stands out.

173. In the **matrix** visual, click the **Extreme** row to drill down to the Product level.

174. Resize the visual as needed.

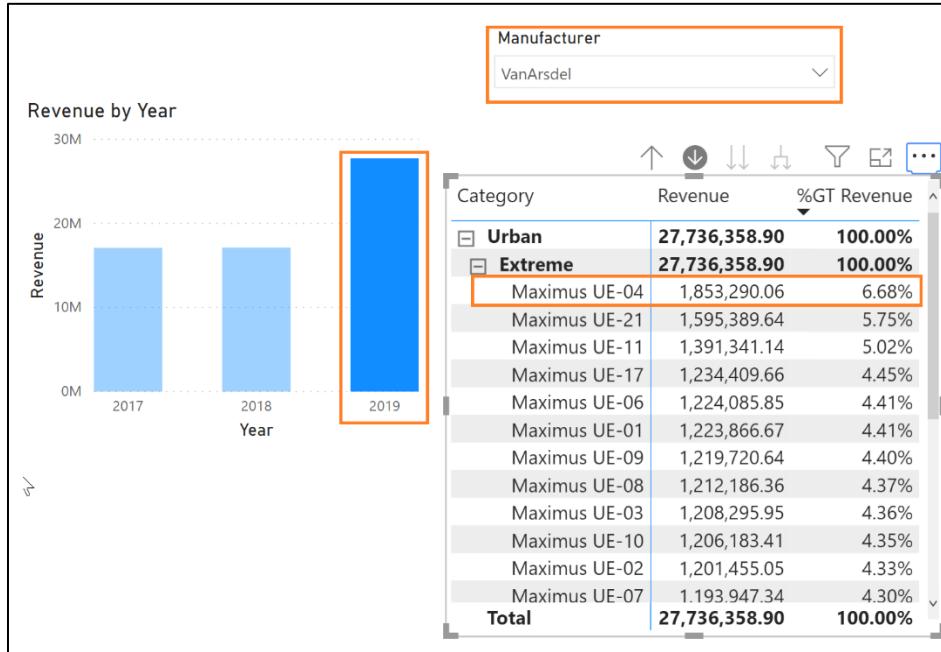
175. Hover over the matrix visual and then click the ellipse in the top right corner.

176. Click **Sort By %GT Revenue** and then click **Sort Descending**.



We can now see the top Products.

177. In the **Revenue by Year** visual, click the **2019** column and click **Australia** in the **Revenue by Country** visual.. Notice that Maximus UE-04 and 21 are the top products. Also, notice that Product 04 has nearly 7% of the grand total and has a big spike.



178. In the **Revenue by Year** visual, click the **2019** column to remove the filter.

Earlier we created a calculated column named **ZipCountry**. Now let's create a **Percent Growth** measure so we can compare sales over time. We are going to do this in two steps.

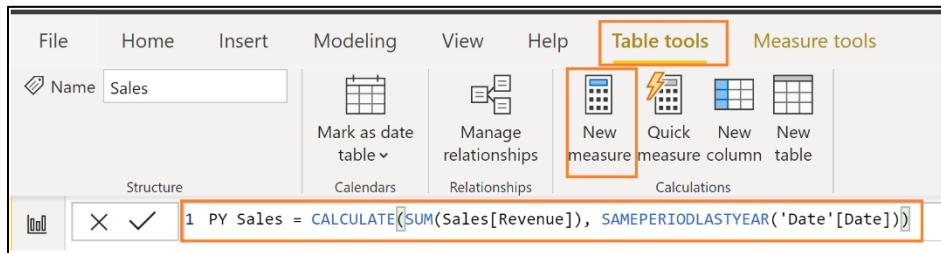
But first, what's the difference between a measure and a calculated column?

- A **Calculated column** is evaluated row by row. We extend a table by adding calculated columns.
- A **Measure** is used when we want to aggregate values from many rows in a table.

179. In the **Fields** section, click the **Sales** table.

180. From the ribbon, click **Table Tools**, then click **New Measure**. A formula bar opens.

181. Enter **PY Sales = CALCULATE(SUM(Sales[Revenue]), SAMEPERIODLASTYEAR('Date'[Date]))**



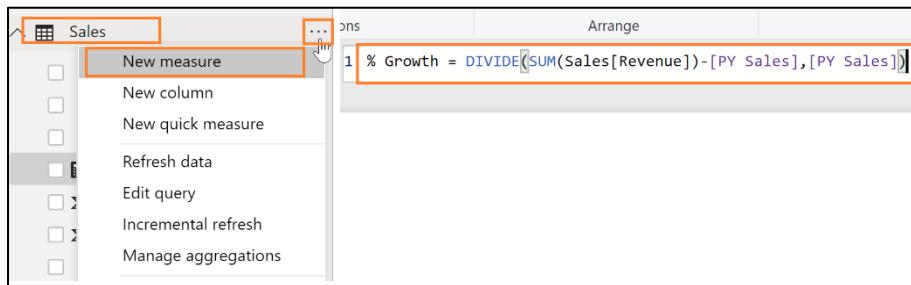
182. Click the checkmark next to the formula bar. You will see the **PY Sales** measure in the **Sales** table.

Let's create another measure.

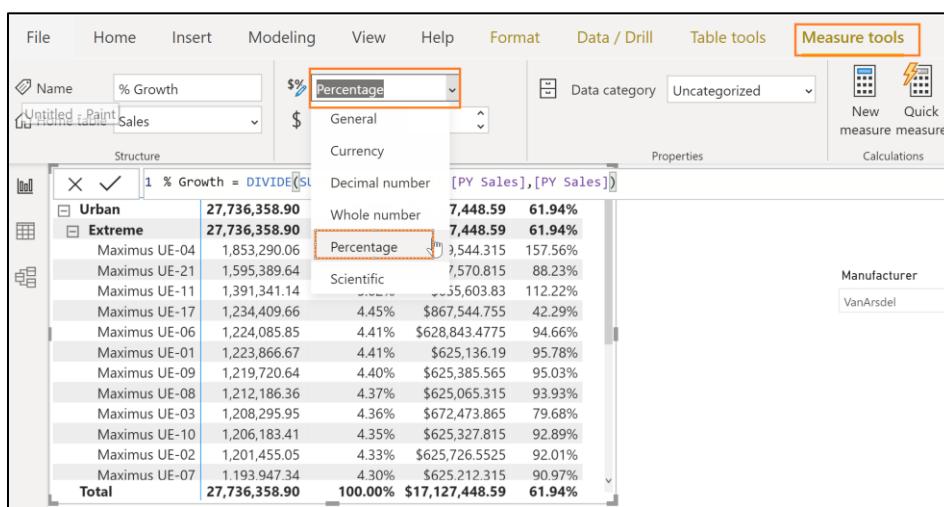
183. In the **Fields** section, hover over the **Sales** table.

184. Click on the **ellipse** in the right corner.

185. Click **New Measure** from the dialog box. A formula bar opens.
186. Enter **% Growth = DIVIDE(SUM(Sales[Revenue])-[PY Sales],[PY Sales])**



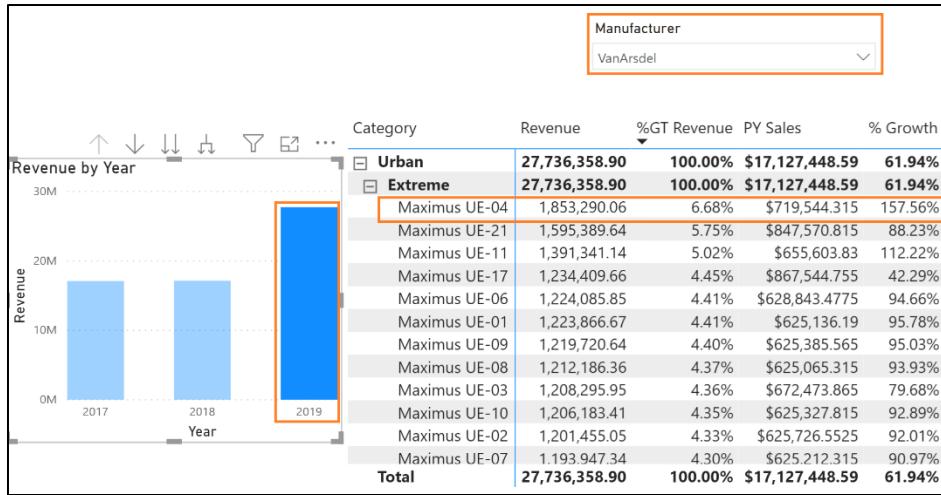
187. Click the checkmark next to the formula bar. You will see **% Growth** measure in the **Sales** table.
188. Click the **matrix** visual.
189. In the **Fields** section, click the checkbox next to the newly created **PY Sales** and **% Growth** measures in the **Sales** table.
- Notice that the Fields need to be formatted.
190. From the **Fields** section, click the **% Growth** field.
191. From the ribbon, click **Measure Tools**, click **Format**, and then click **Percentage**.



192. Similarly, from the **Fields** section, and then click the **PY Sales** field.
193. From the ribbon, click **Measure Tools**, click **Format**, and then click **Currency**, if it isn't already formatted Currency .
194. Similarly, from the **Fields** section, and then click the **Revenue** field.

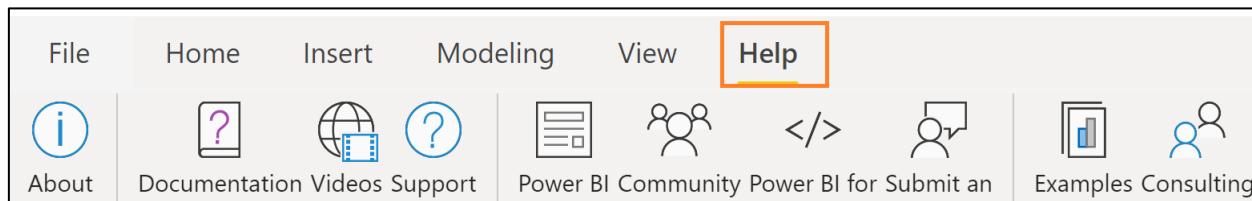
195. From the ribbon, click **Measure Tools**, click **Format**, and then click **Currency** if it isn't already formatted to Currency

196. Ensure that **Australia** is selected and In the **Revenue by Year** visual, Ctrl + click the **2019** column. Notice that Maximus UE-04 has nearly 158% growth compared to last year.



References

Dashboard in a Day introduces you to some of the key functions available in Power BI. In the ribbon of the Power BI Desktop, the Help section has links to some great resources.



Here are a few more resources that will help you with your next steps with Power BI.

- Getting started: <http://powerbi.com>
- Power BI Desktop: <https://powerbi.microsoft.com/desktop>
- Power BI Mobile: <https://powerbi.microsoft.com/mobile>
- Community site <https://community.powerbi.com/>
- Power BI Getting started support page:
<https://support.powerbi.com/knowledgebase/articles/430814-get-started-with-power-bi>
- Support site <https://support.powerbi.com/>
- Feature requests <https://ideas.powerbi.com/forums/265200-power-bi-ideas>
- New ideas for using Power BI https://aka.ms/PBI_Comm_Ideas
- Power BI Courses <http://aka.ms/pbi-create-reports>

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