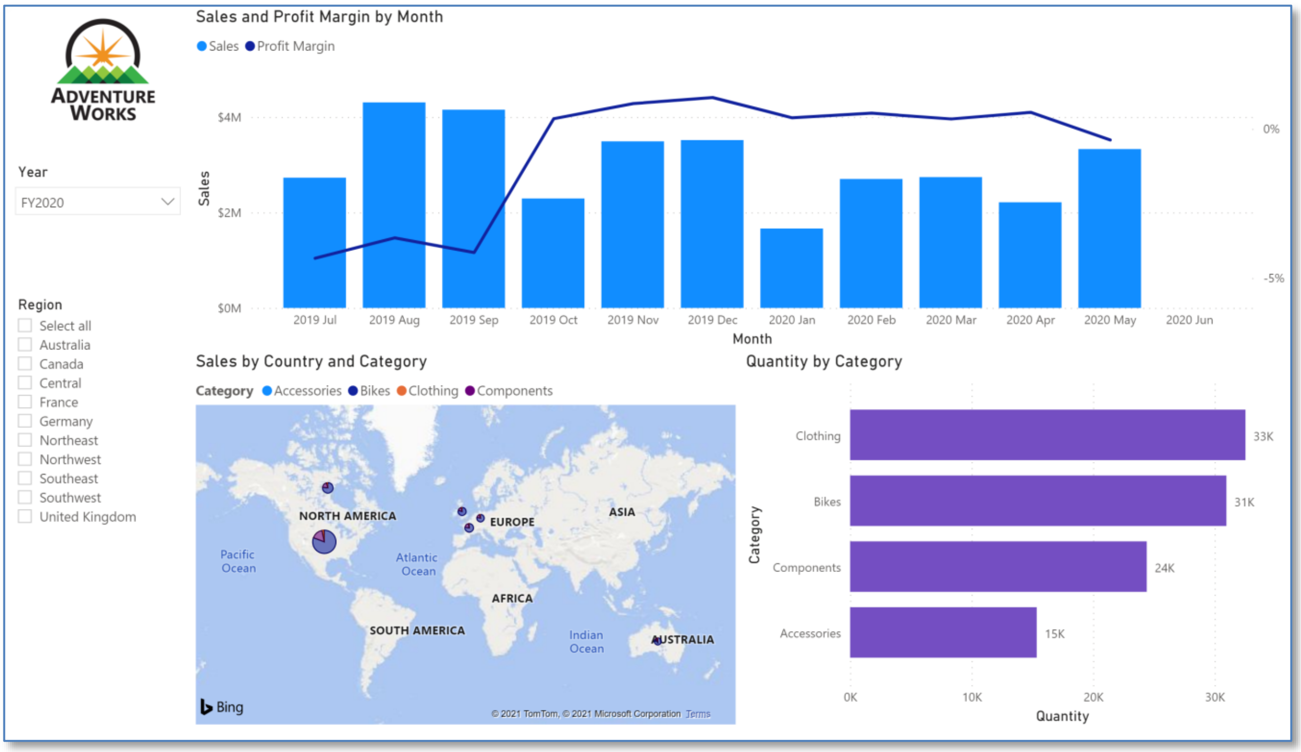
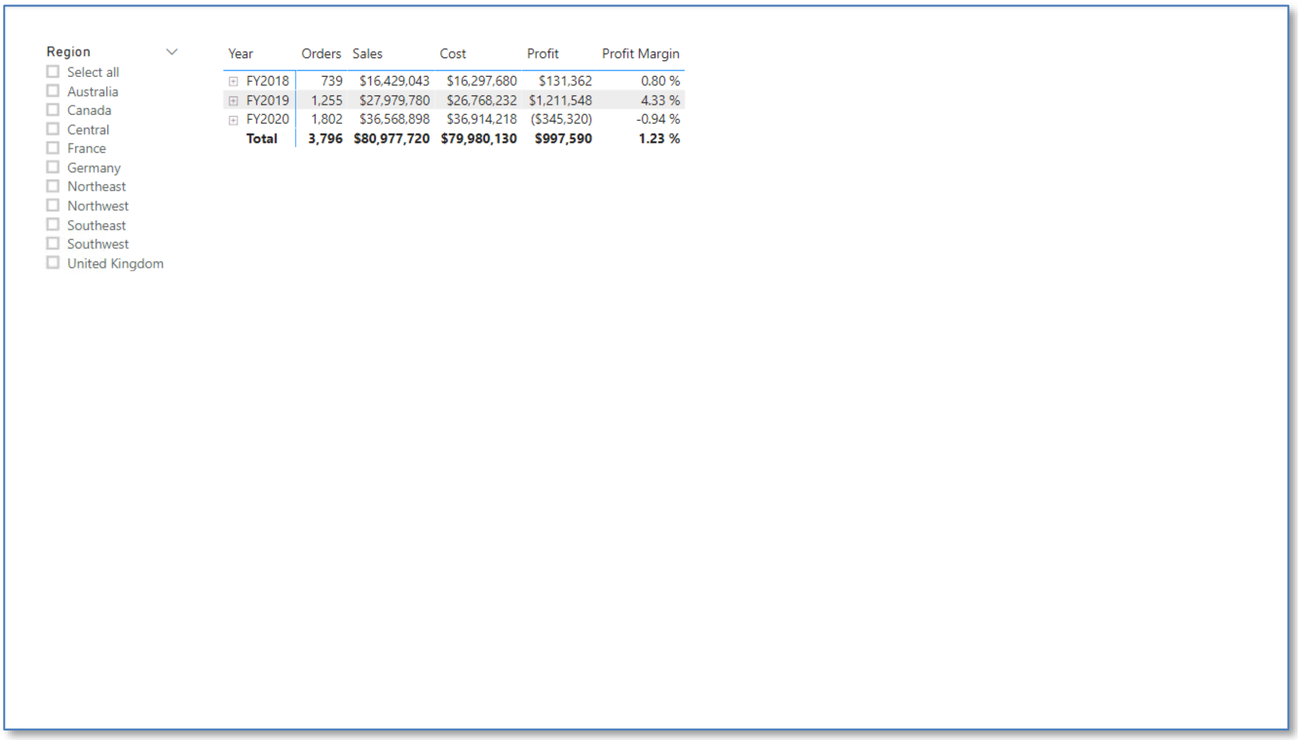
Exercise 1

In this exercise, you will create a sales report with three pages (Overview, Profit and My Performance) from Exercise 1.pbix. When you've completed the design, the page will look like the following





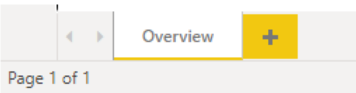
Year	Orders	Sales	Cost	Profit	Profit Margin
FY2018	739	$16,429,043	$16,297,680	$131,362	0.80 %
FY2019	1,255	$27,979,780	$26,768,232	$1,211,548	4.33 %
FY2020	1,802	$36,568,898	$36,914,218	($345,320)	-0.94 %
Total	**3,796**	**$80,977,720**	**$79,980,130**	**$997,590**	**1.23 %**


Year
FY2019
$8,658,484
Sales
$8,650,000
Target
$8,484
Variance
0.10 %
Variance Margin
Sales and Target by Month
Sales
Target
Month
Sales and Target
Sales and Target by Month
Sales
Target
Sales and Target
Month

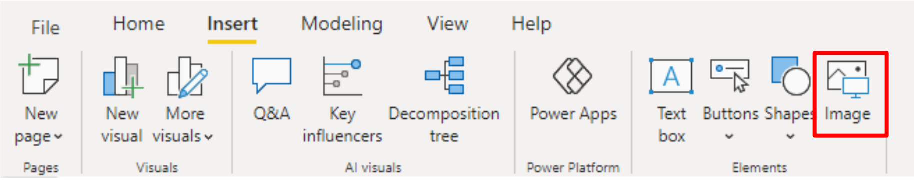
Answer

Page 1: Overview

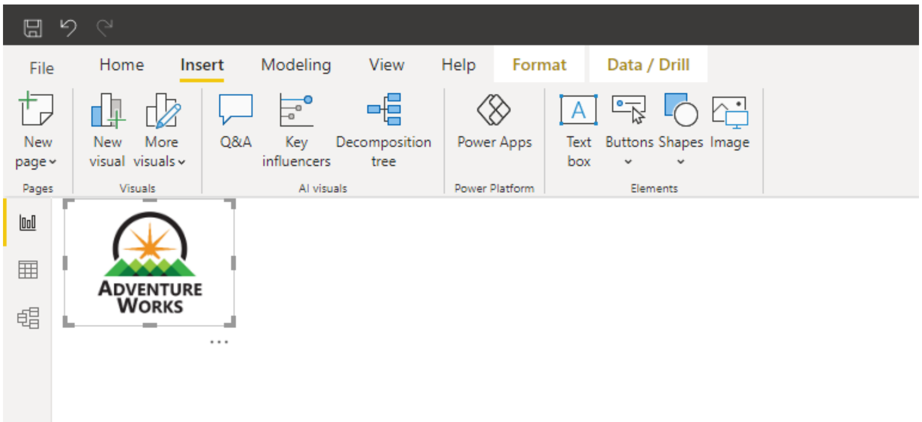
1. Select **File ➔ Open Report**, and open *Exercise 1.pbix*. Start on a blank report page and rename as **Overview**.



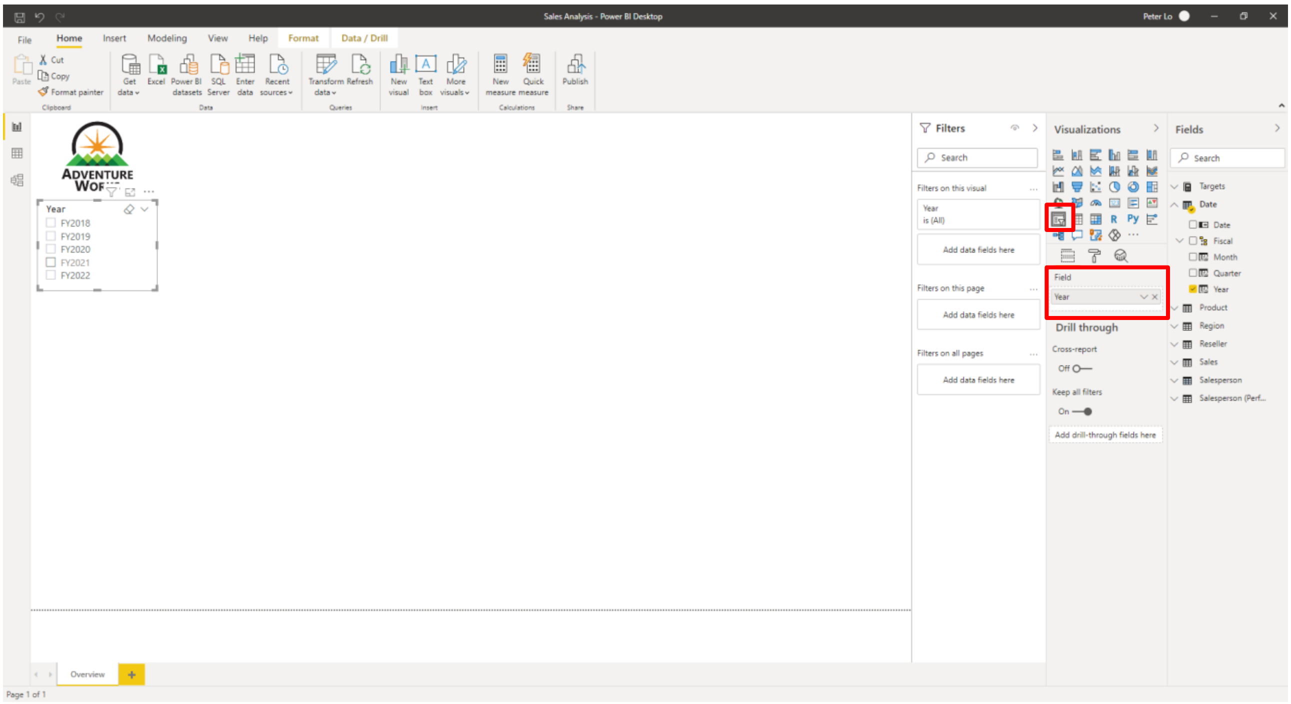
2. To add the logo, on the **Insert** tab, from **Elements** group, click **Image**.



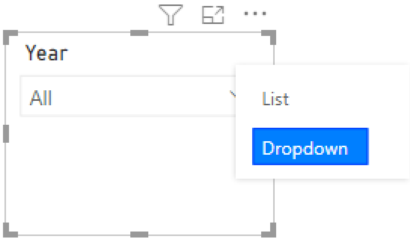
3. Select the *AdventureWorksLogo.jpg* file. Then reposition and resize it at the top-left corner.



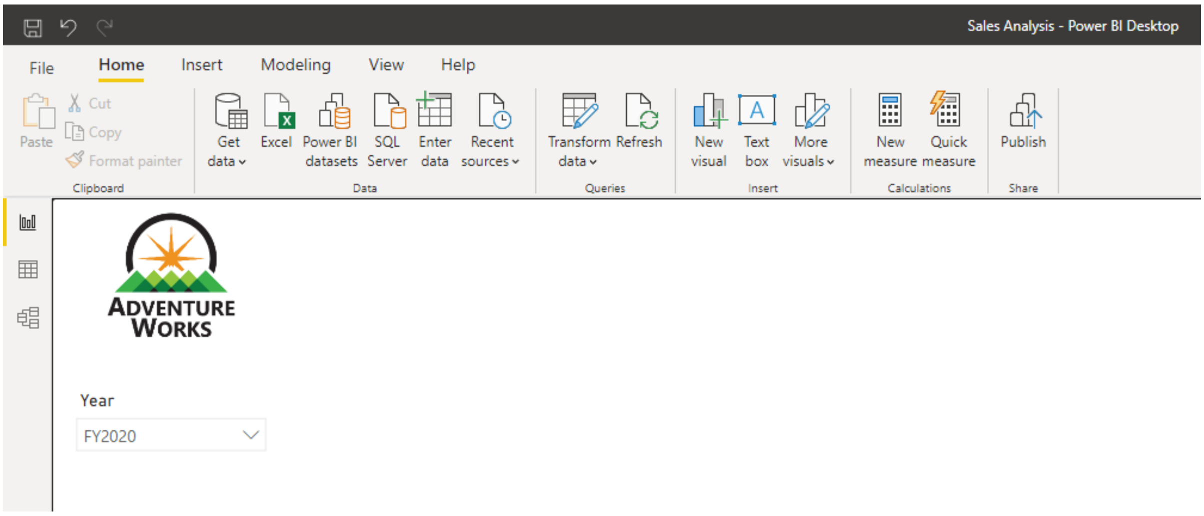
4. To add a slicer, select **Slicer** in the **Visualizations** pane, and select the *Date* ➔ *Year* in the **Fields** pane.



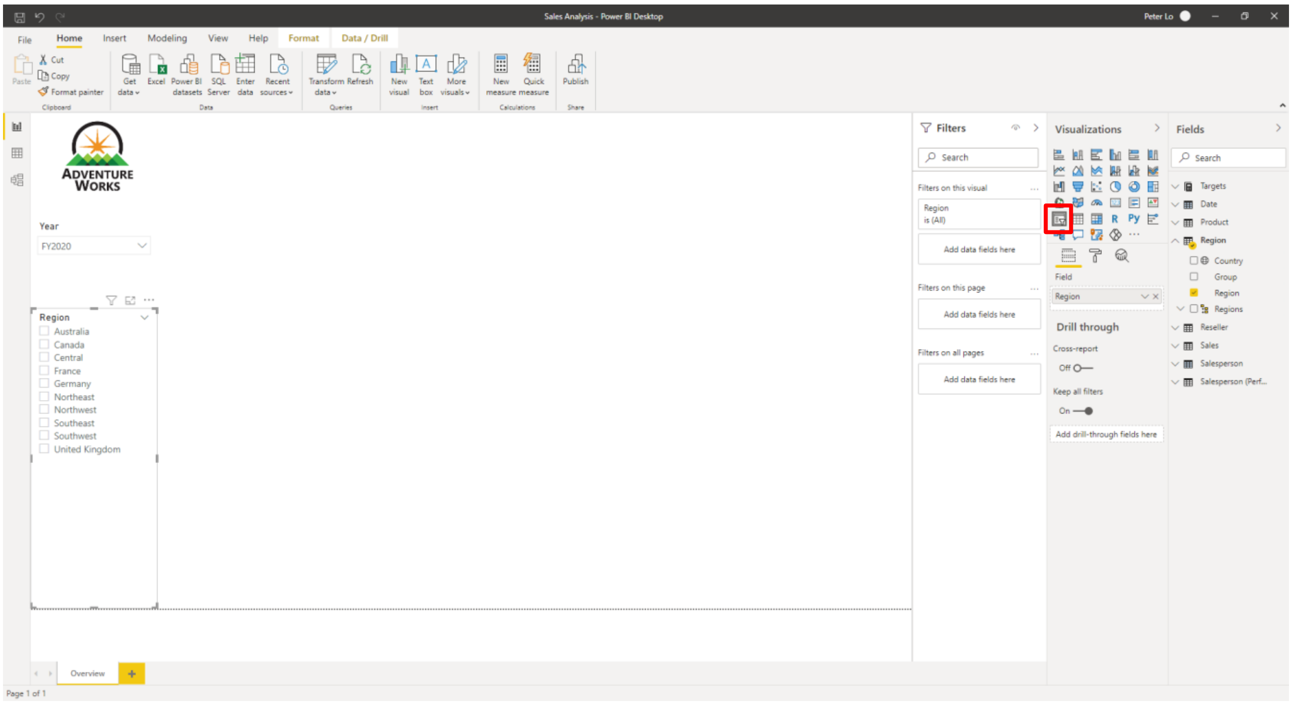
5. To convert the slicer from a list to a dropdown, at the top-right of the slicer, click the down-arrow, and then select **Dropdown**. Resize and reposition the slicer so it sits beneath the image, and so it is the same width as the image.



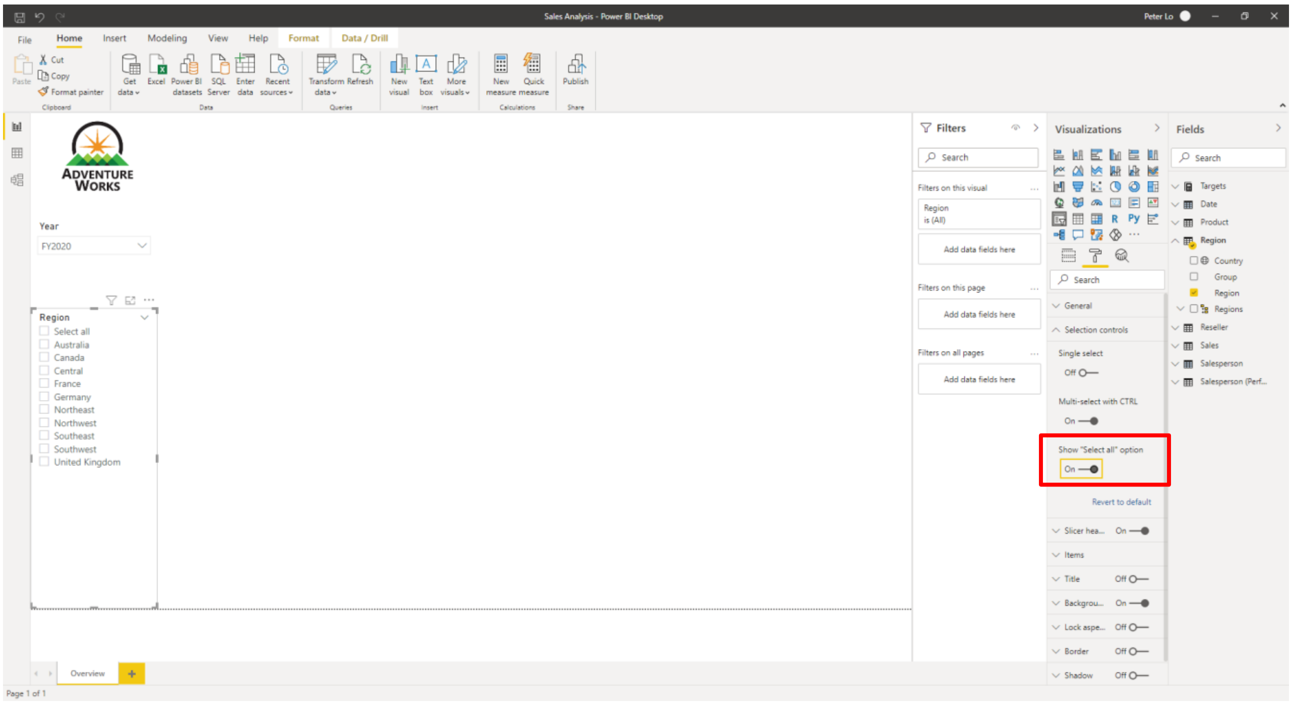
6. In the Year slicer, select "FY2020", and then collapse the dropdown list. The report page is now filtered by year FY2020.



7. Create a second slicer, based on the *Region* ➔ *Region* field. Leave the slicer as a list, and then resize and reposition the slicer beneath the Year slicer.

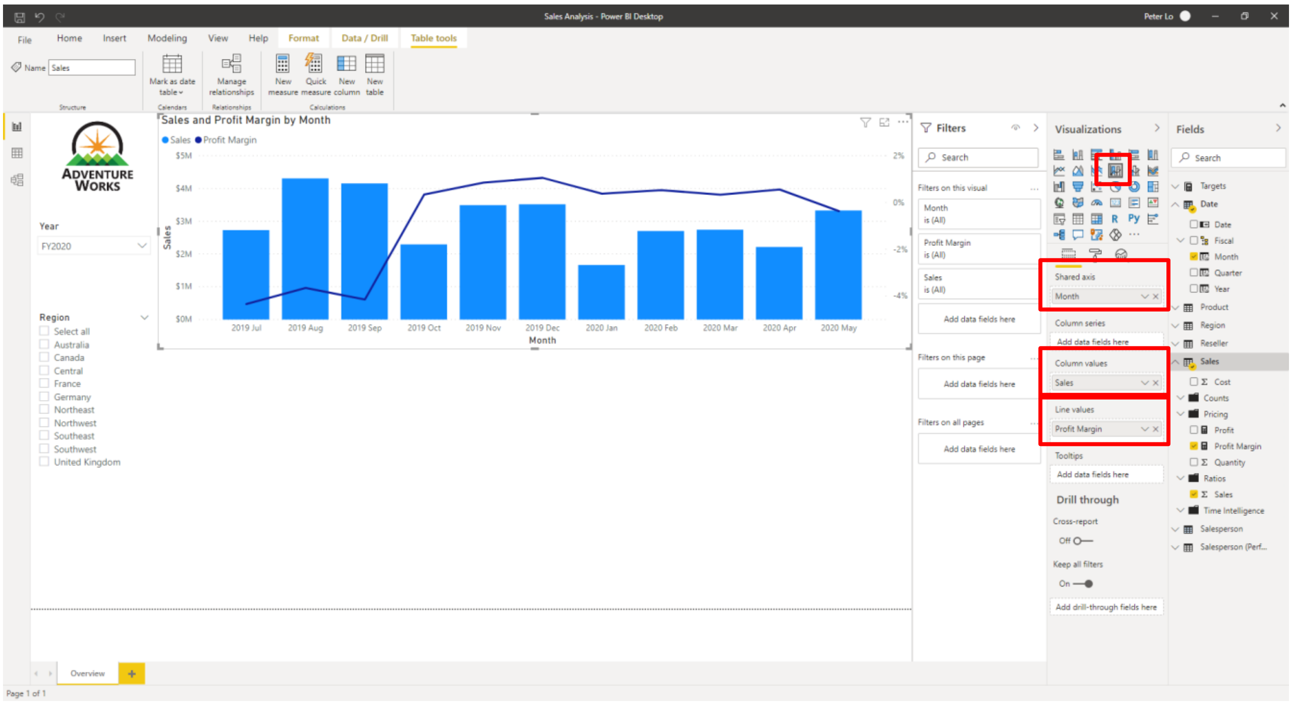


8. To format the slicer, beneath the **Visualizations** pane, open the **Format** pane. Expand the **Selection Controls** group. Set the Show "**Select All**" Option to **On**. In the **Region** slicer, notice that the first item is now "Select All".

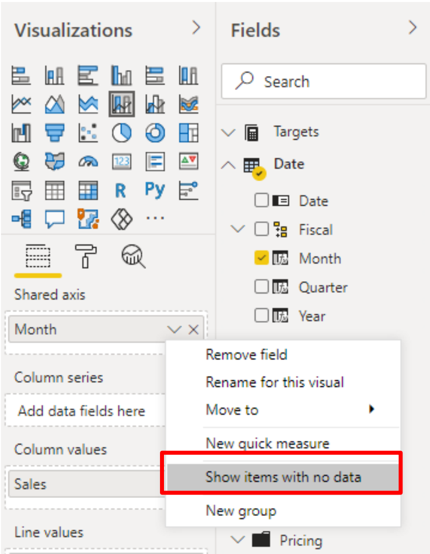


9. Click the **Line and Stacked Column Chart** visual type in the **Visualizations** pane. Drag the following fields from **Field** pane into the visual:

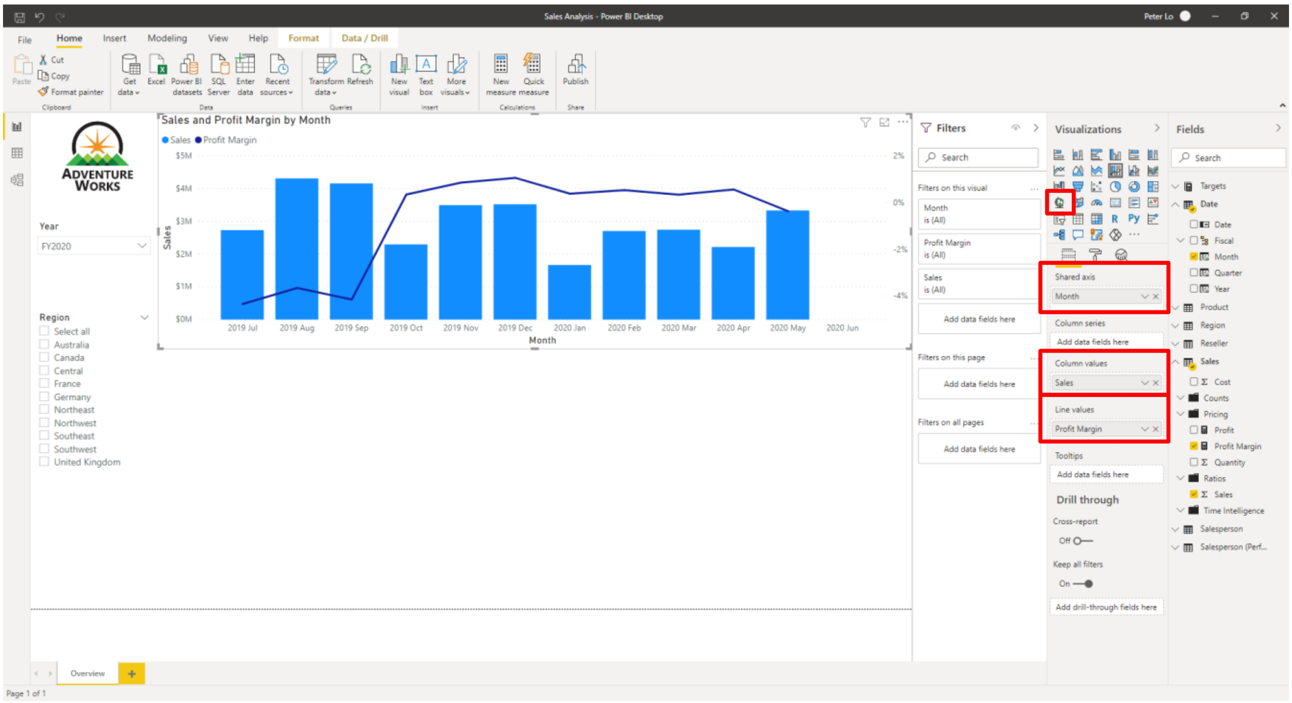
- Assign *Date* ➔ *Month* into **Shared Axis**
- Assign *Sales* ➔ *Sales* into **Column Value**
- Assign *Sales* ➔ *Profit Margin* into **Line Values**



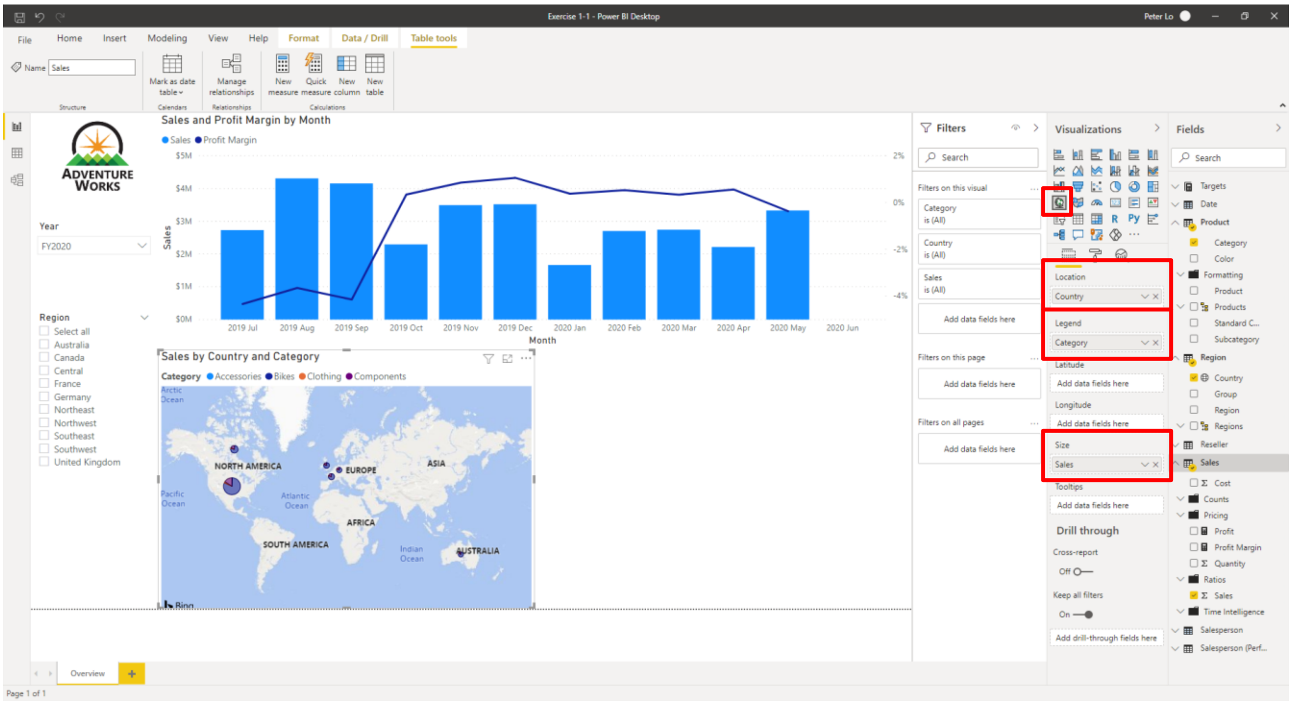
10. Notice that the visual has 11 months only. The last month of the year, 2020 June, does not have any sales. By default, the visual has eliminated months with blank sales. In the **visual** fields pane, in the **Shared Axis** well, for the Month field, click the down-arrow, and then select **Show Items With No Data**.



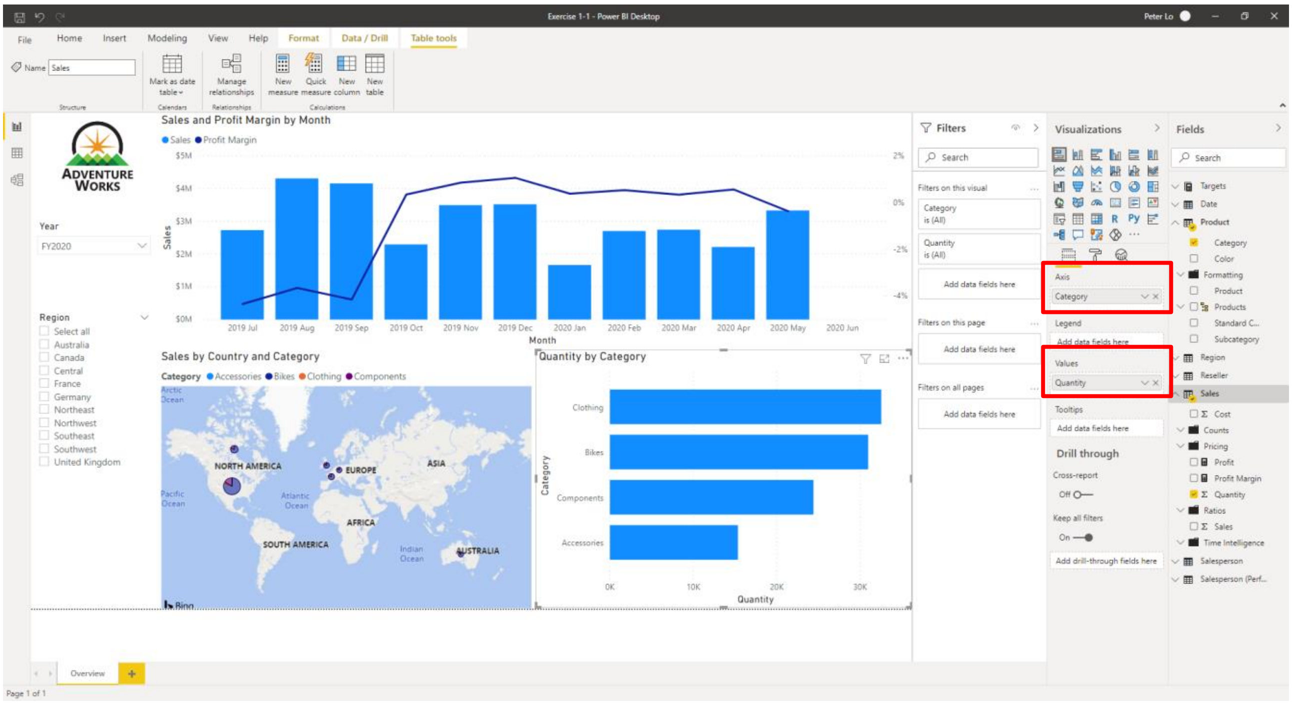
11. Notice that the month 2020 June now appears.



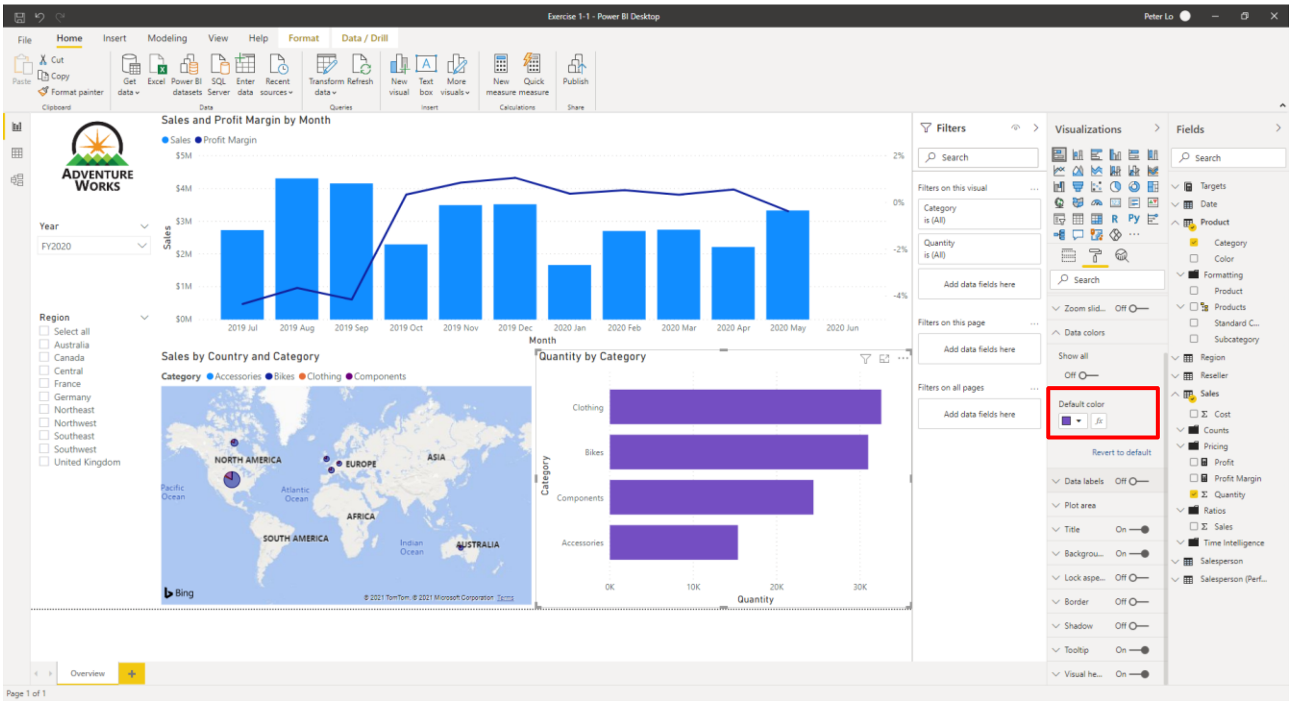
12. Click the **Map** visual type in the **Visualizations** pane. Resize and reposition the visual so it sits beneath the column/line chart, and so it fills half the width of the report page. Add the following fields to the visual wells:
    - Assign *Region* ➔ *Country* into **Location**
    - Assign *Product* ➔ *Category* into **Legend**
    - Assign *Sales* ➔ *Sales* into **Size**



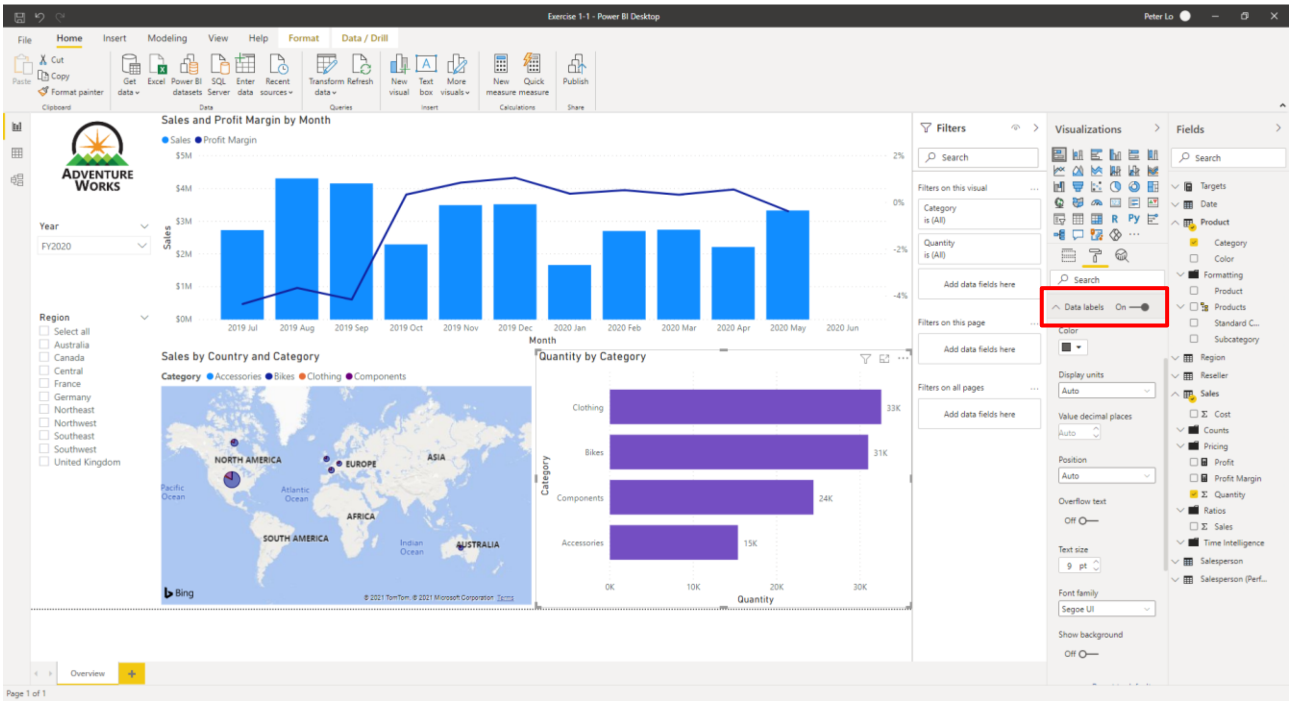
13. Click the **Stacked Bar Chart** visual type in the **Visualizations** pane. Resize and reposition the visual so it fills the remaining report page space. Add the following fields to the visual wells:
    - Assign *Product* ➔ *Category* to **Axis**
    - Assign *Sales* ➔ *Quantity* to **Value**



14. Open the **Format** pane, expand the **Data Colors** group, and then set the **Default Color** property to **Purple** (#744EC2).

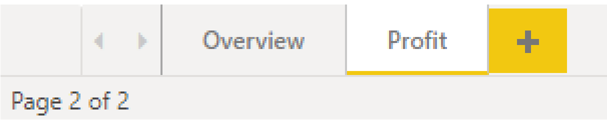


15. Set the **Data Labels** property to On.

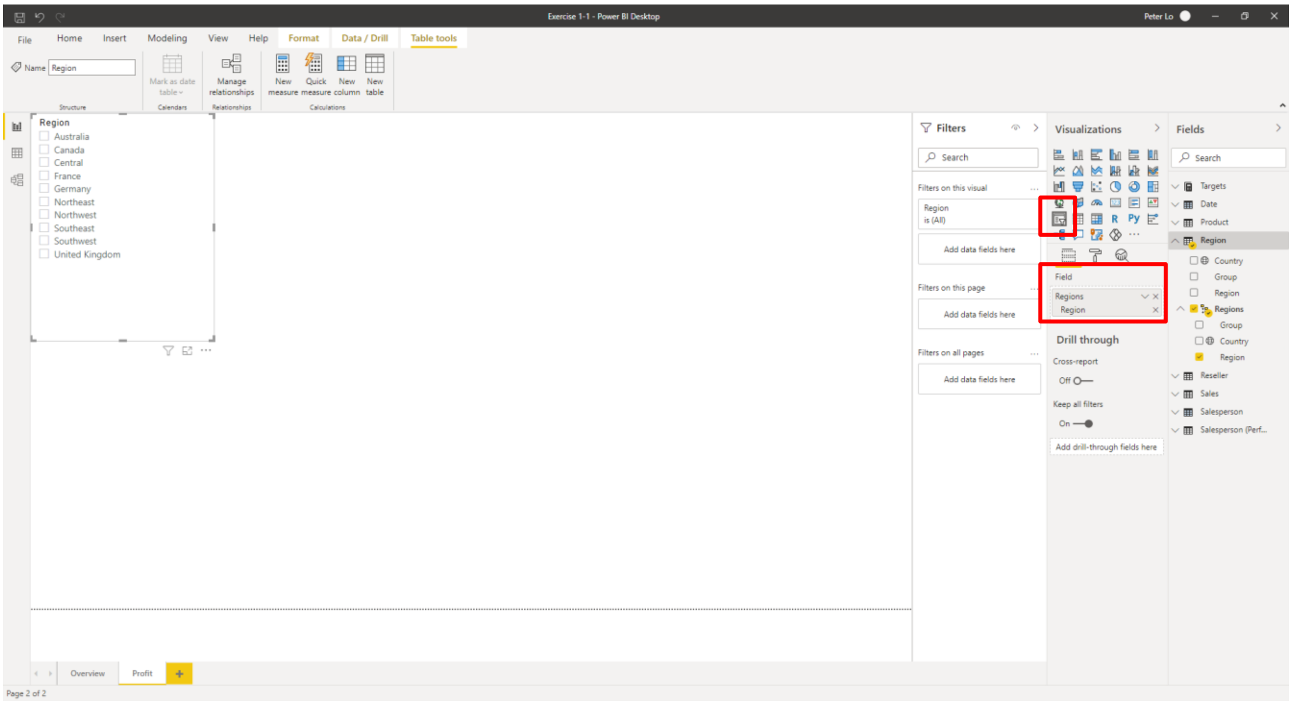


Page 2: Profit

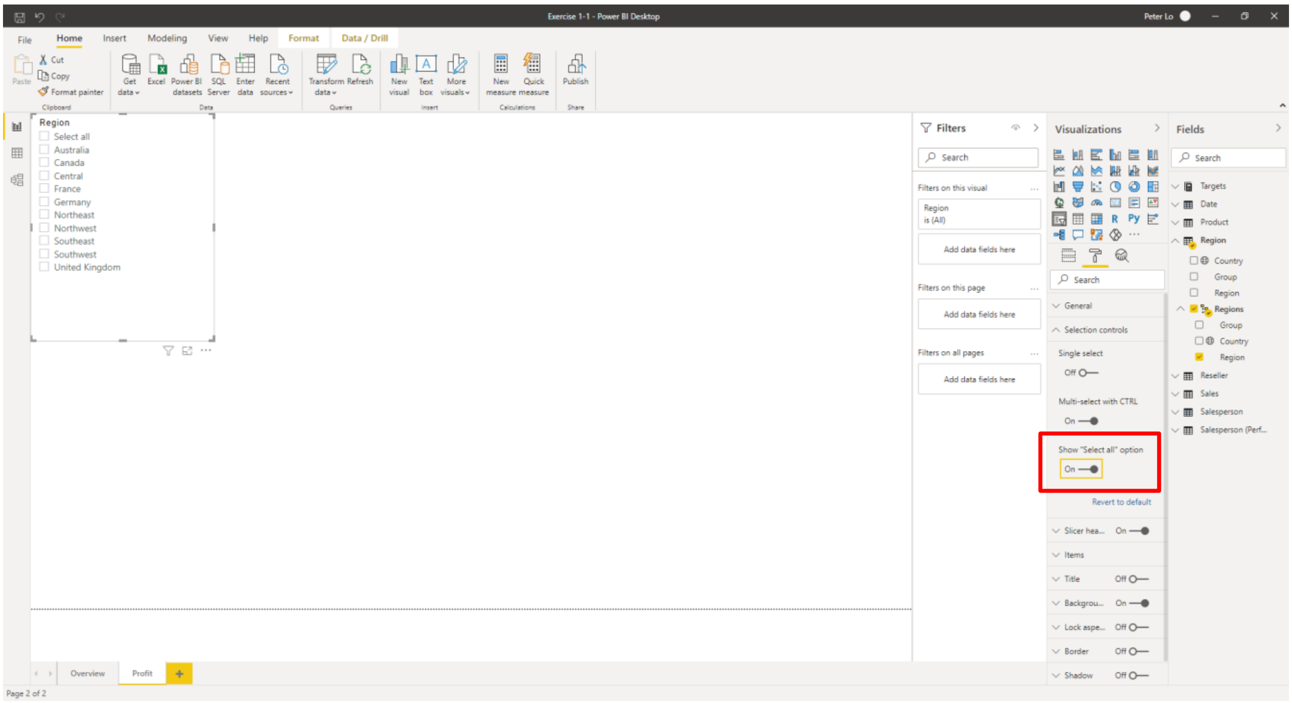
1. Click the **[+]** icon at the bottom-left to create a new page, and rename the page to "**Profit**".



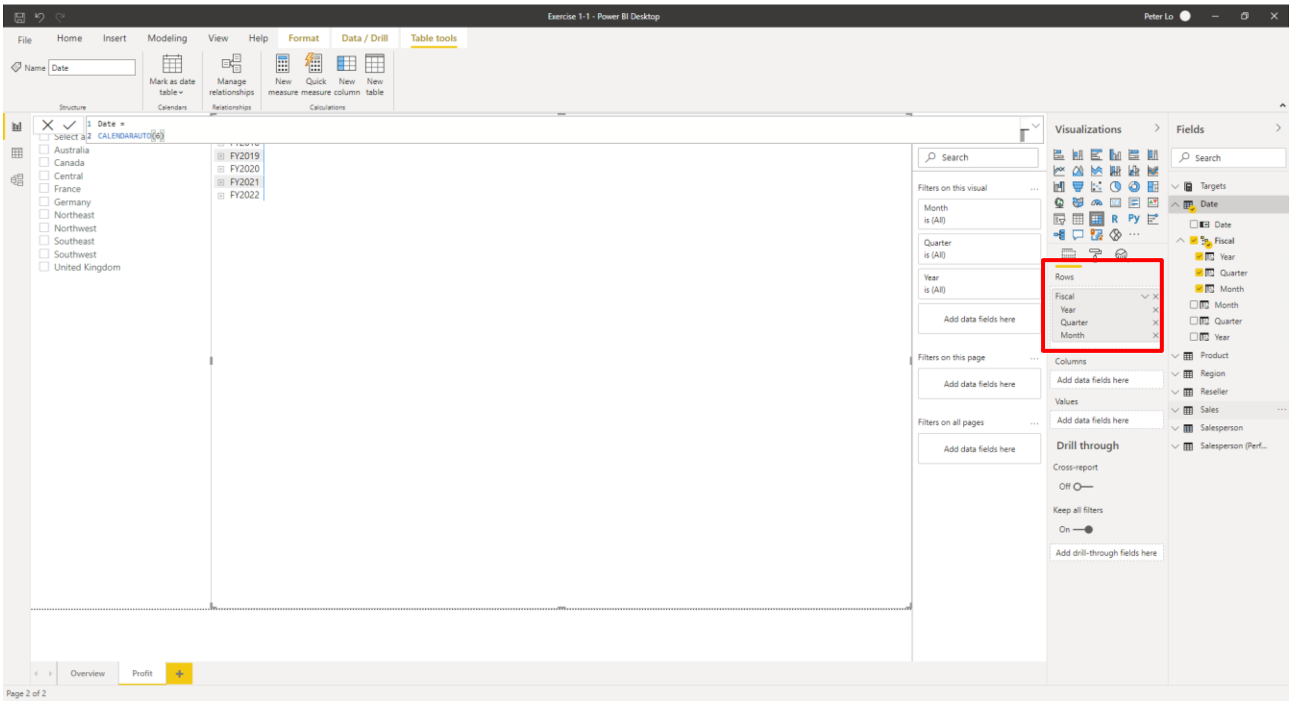
2. Add a slicer based on the *Region* ➔ *Regions* ➔ *Region* field. Resize and reposition the slicer so it sits at the left side of the report page, and so it is about half the page height.



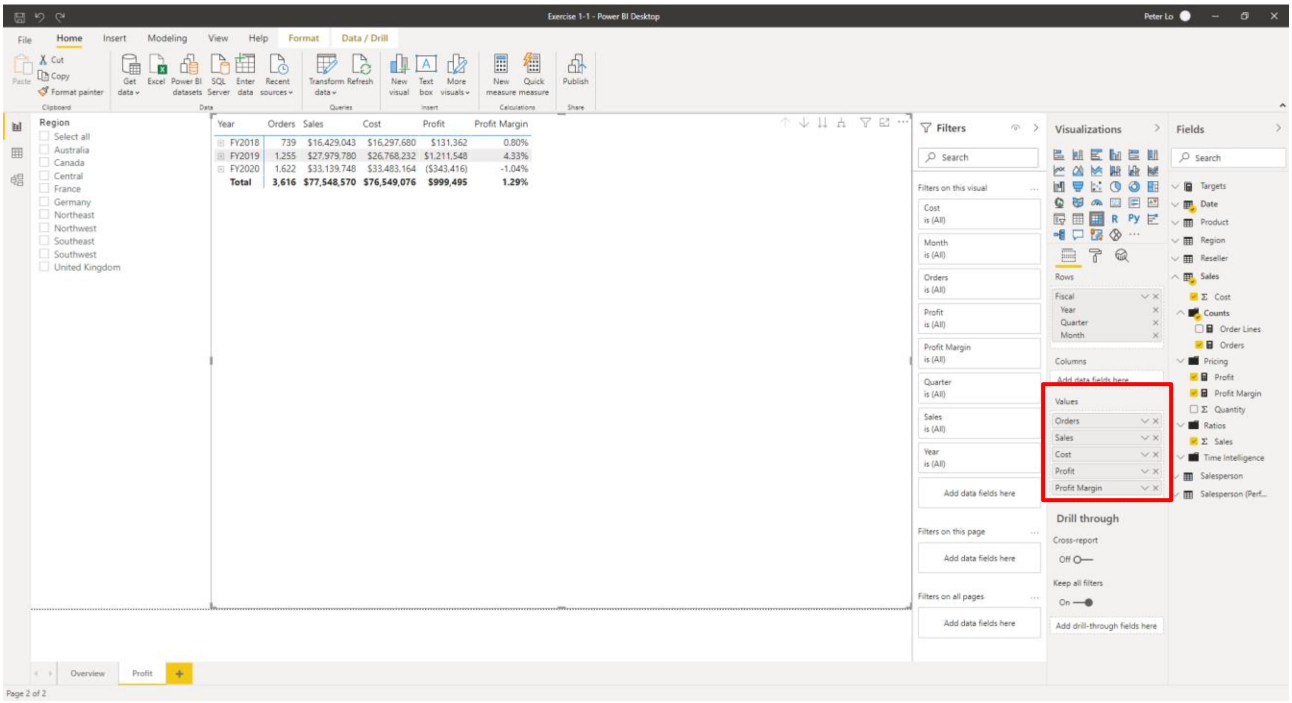
3. Use the **Format** pane to enable the "**Select All**" option (in the **Selection Controls** group).



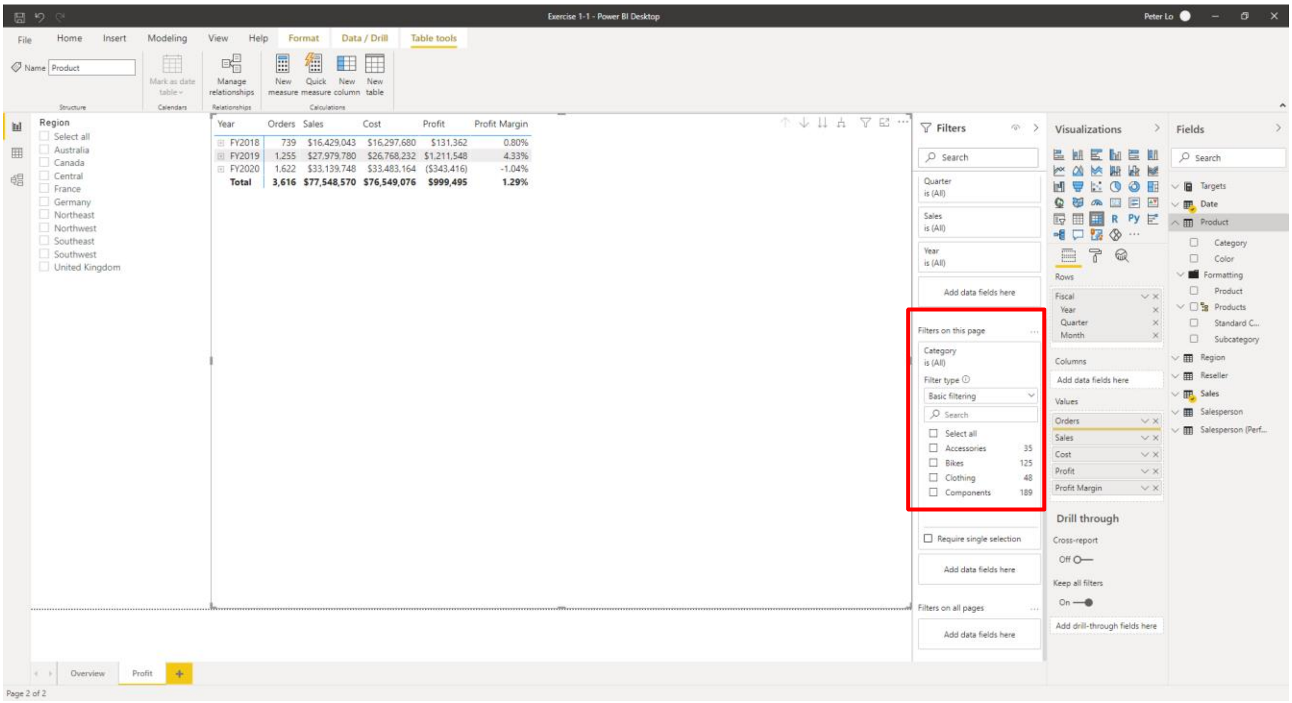
4. Add a matrix visual, and resize and reposition it so it fills the remaining space of the report page. Then add the *Date* ➔ *Fiscal* hierarchy to the matrix **Rows** well.



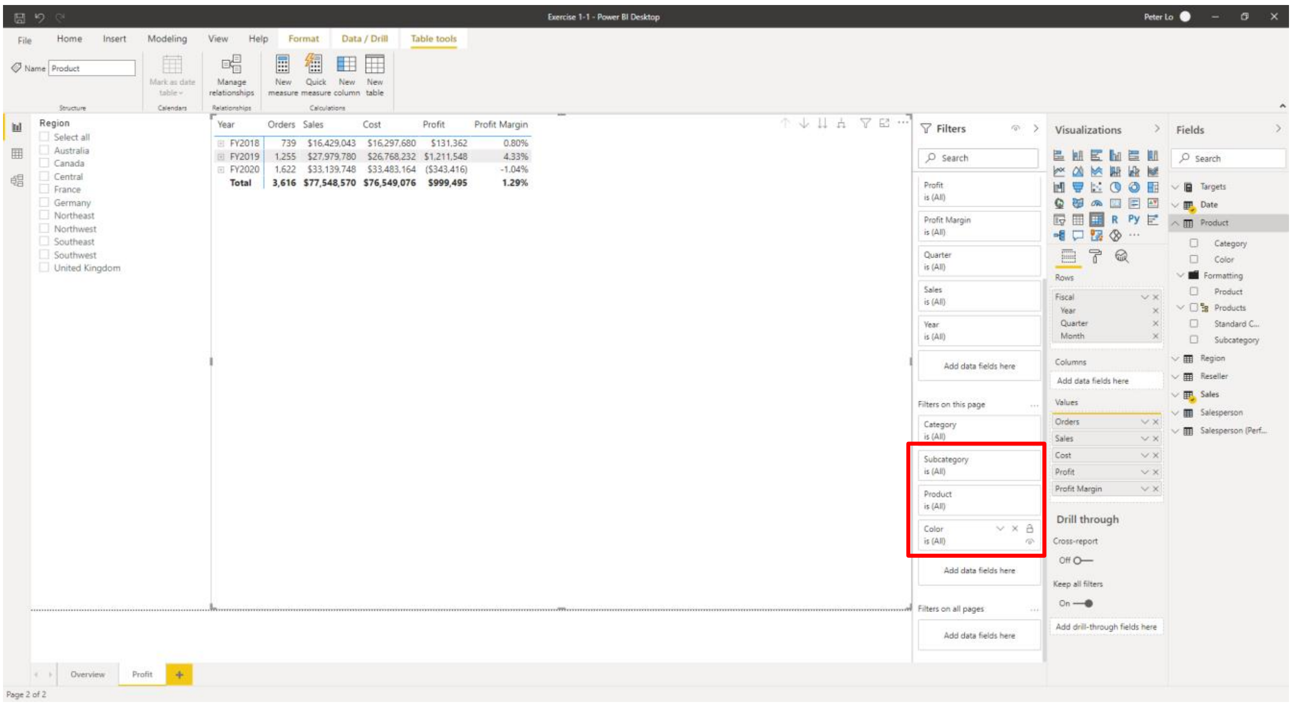
5. Add the following five Sales table fields to the **Values** well:
   - Assign *Sales* ➔ *Counts* ➔ *Orders* to **Value**
   - Assign *Sales* ➔ *Sales* to **Value**
   - Assign *Sales* ➔ *Cost* to **Value**
   - Assign *Sales* ➔ *Profit* to **Value**
   - Assign *Sales* ➔ *Profit Margin* to **Value**



6. From the **Fields** pane, drag the *Product* ➔ *Category* field into the **Filters on this Page** well in the **Filters** pane.

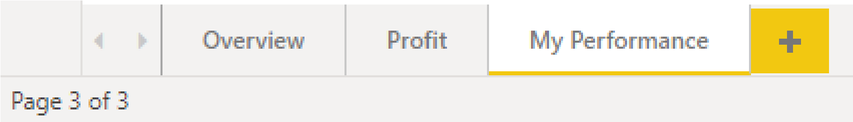


7. Add each of the following Product table fields to the **Filters on this Page** well, collapsing each, directly beneath the Category card:
   - Product ➔ Subcategory
   - Product ➔ Product
   - Product ➔ Color

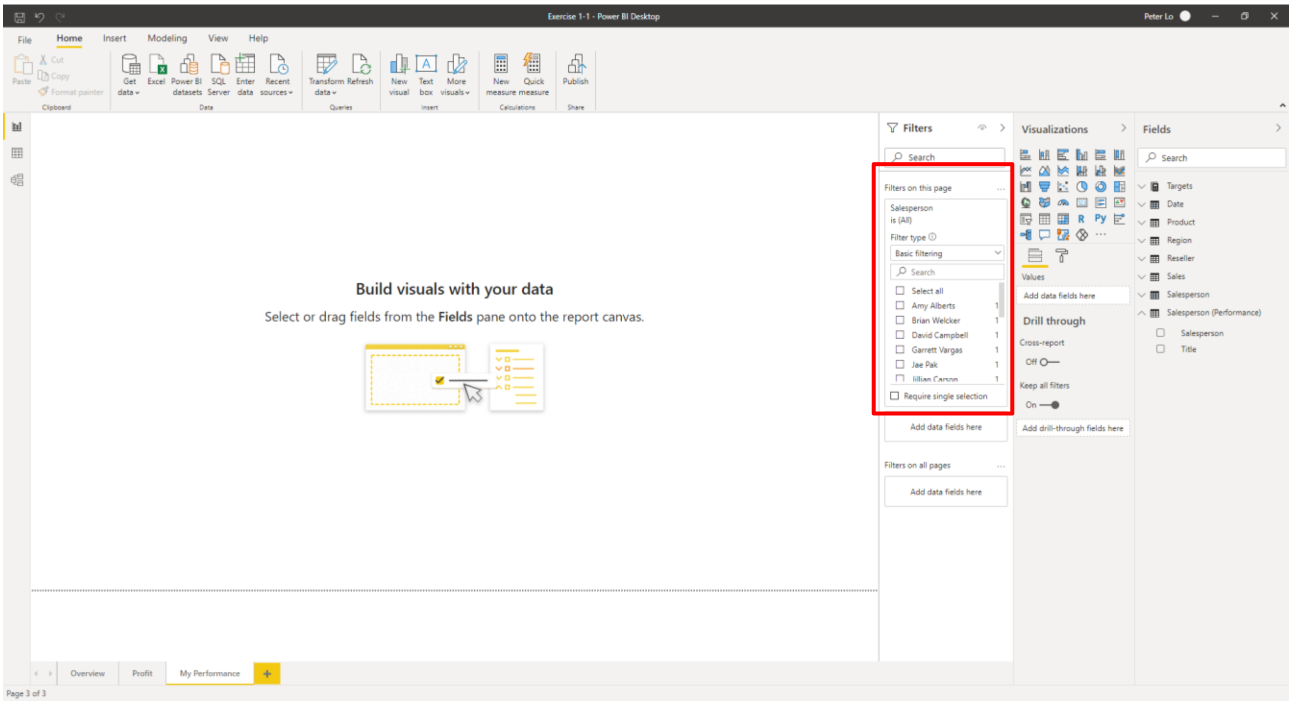


Page 3: My Performance

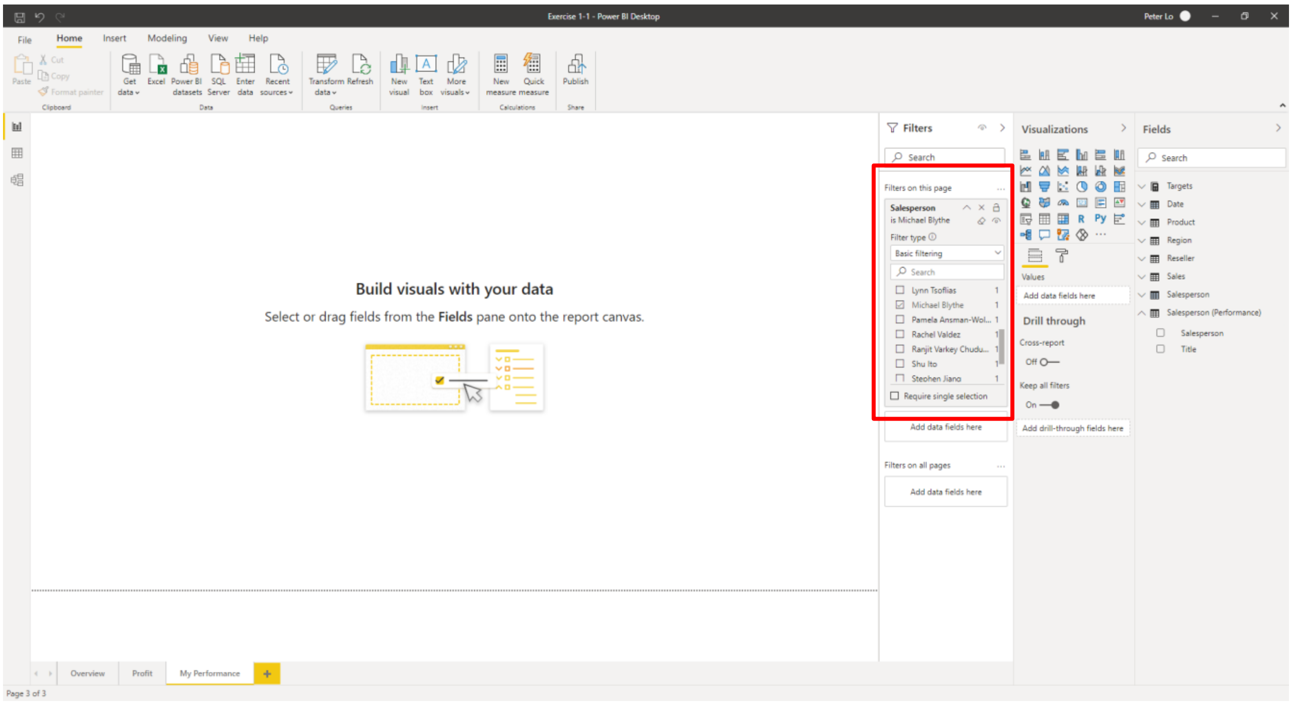
1. Click the **[+]** icon at the bottom-left to create a new page, and rename the page to "**My Performance**".



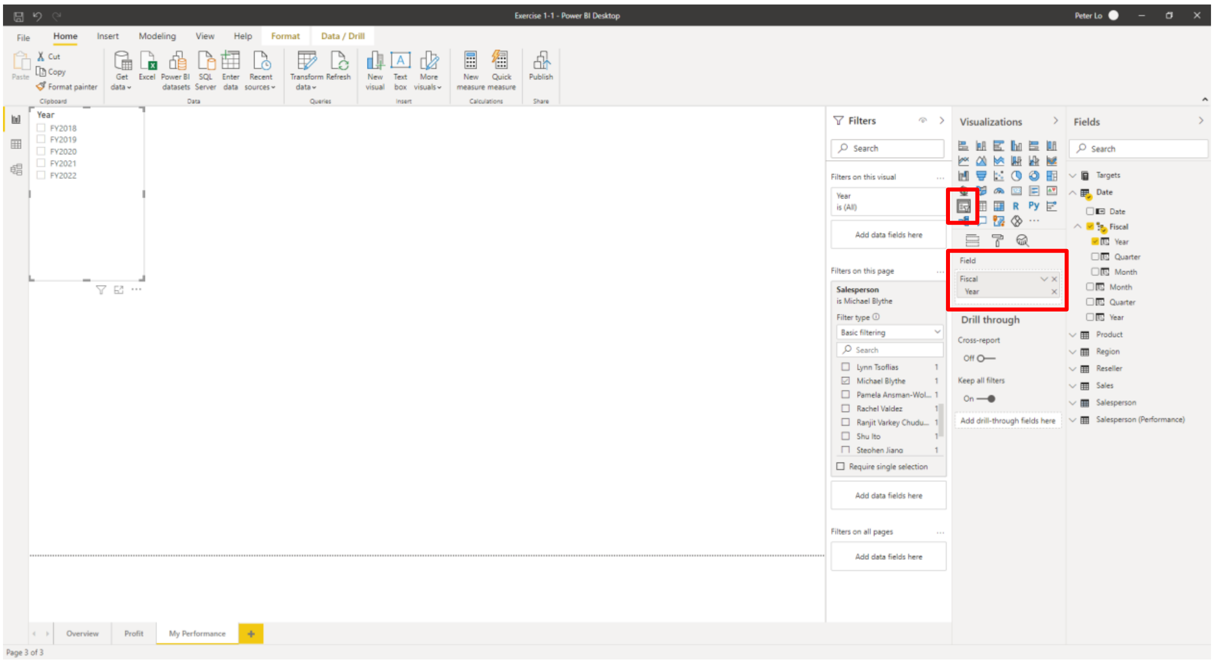
2. To simulate the row-level security filters during report design and testing, drag *the Salesperson (Performance)* ➔ *Salesperson* from the **Fields** pane to the **Filters** pane, inside the **Filters on this Page** well.



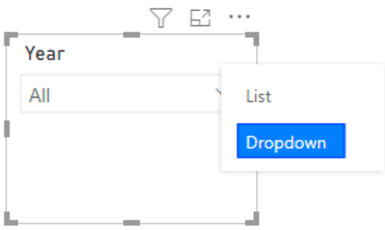
3. In the **filter** card, scroll down the list of salespeople, and then check *Michael Blythe*.



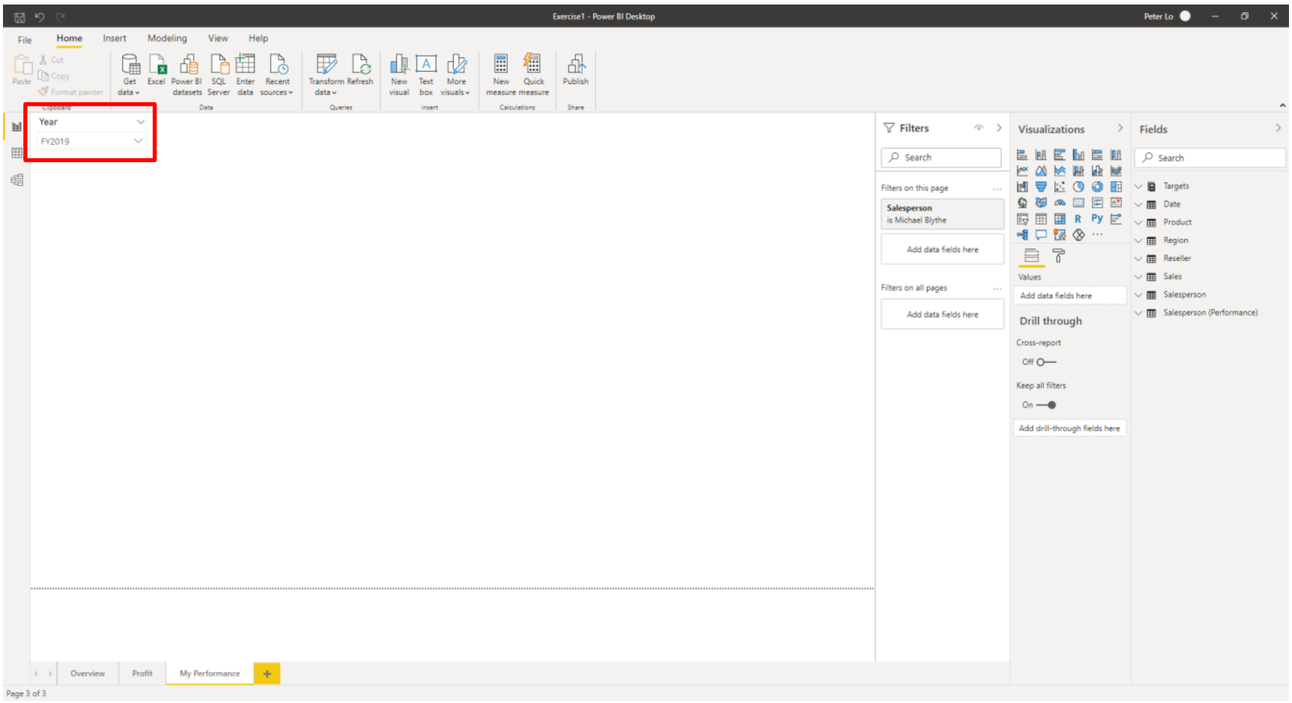
4. To add a slicer, select **Slicer** in the **Visualizations** pane, and select the *Date* ➔ *Year* in the **Fields** pane. Then resize and reposition it so it sits at the top-left corner of the page.



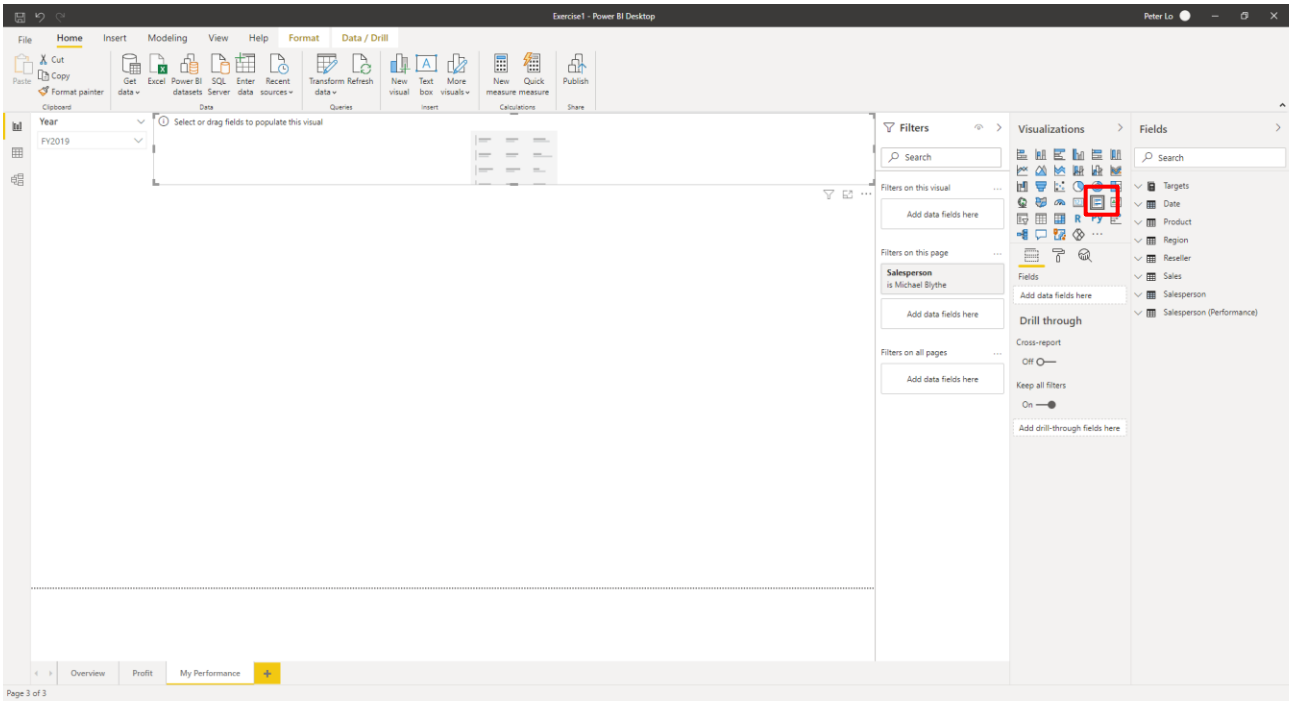
5. To convert the slicer from a list to a dropdown, at the top-right of the slicer, click the down-arrow, and then select **Dropdown**. Resize and reposition the slicer so it sits beneath the image, and so it is the same width as the image.



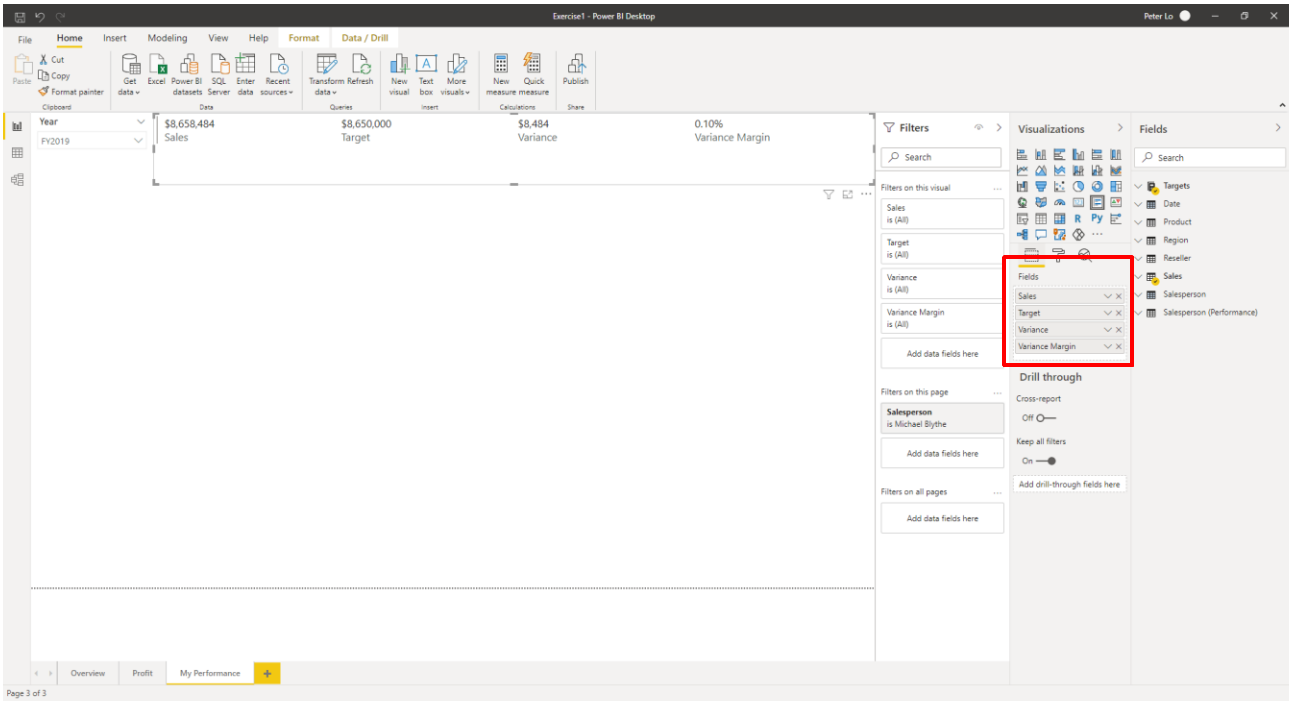
6. In the slicer, select *FY2019*.



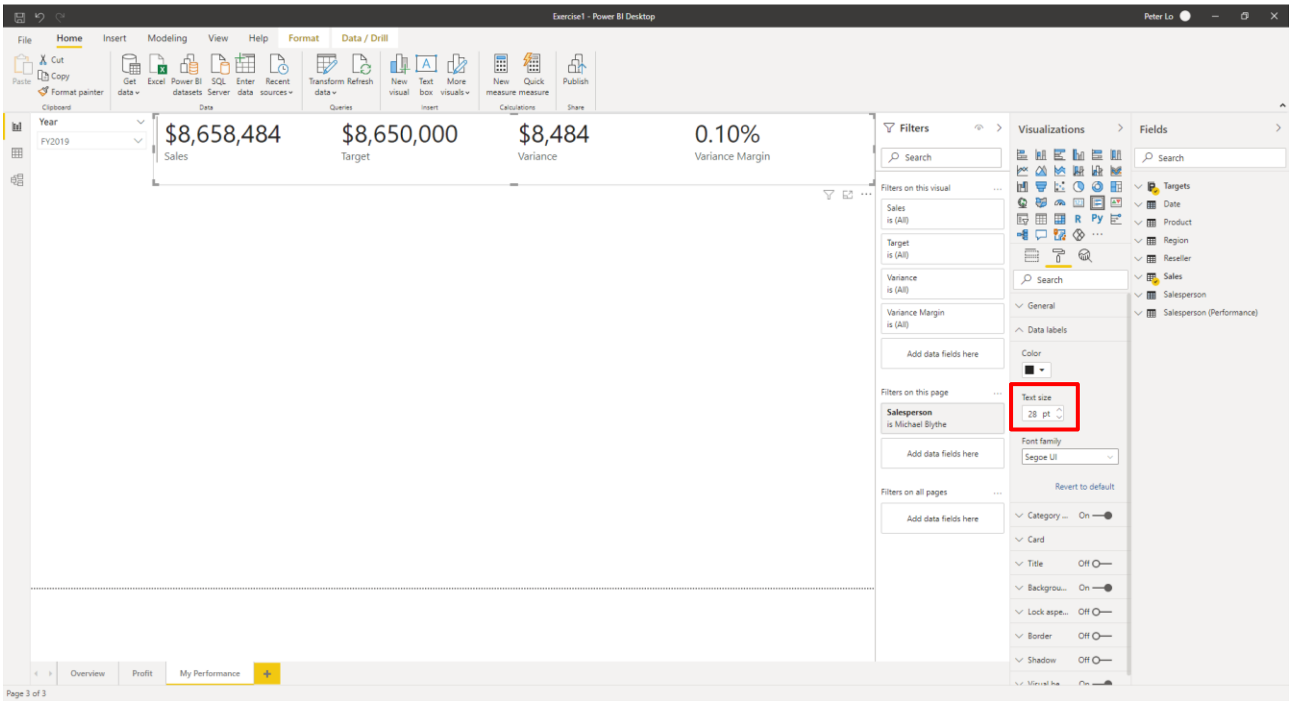
7. Add a **Multi-row Card** visual, and then resize and reposition it so it sits to the right of the slicer and fills the remaining width of the page.



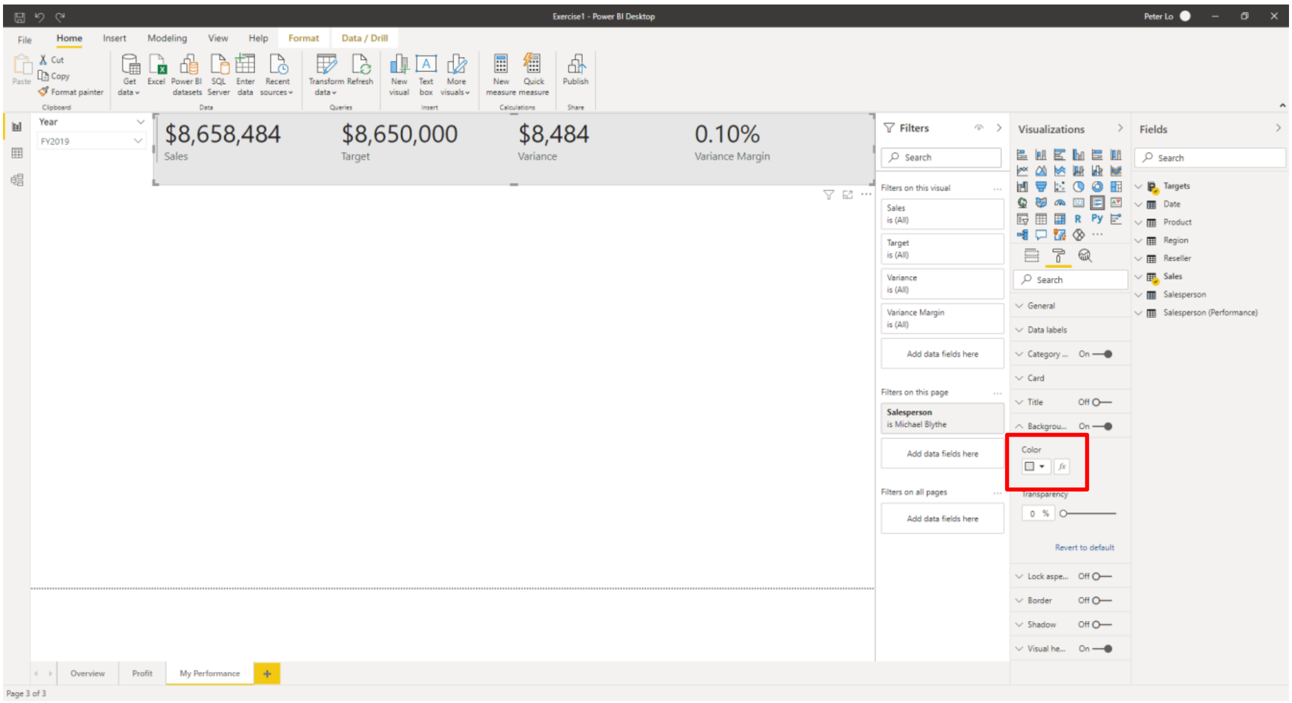
8. Add the following four fields to the visual:
   - Assign *Sales* ➔ *Sales* to **Field**
   - Assign *Targets* ➔ *Target* to **Field**
   - Assign *Targets* ➔ *Variance* to **Field**
   - Assign *Targets* ➔ *Variance Margin* to **Field**



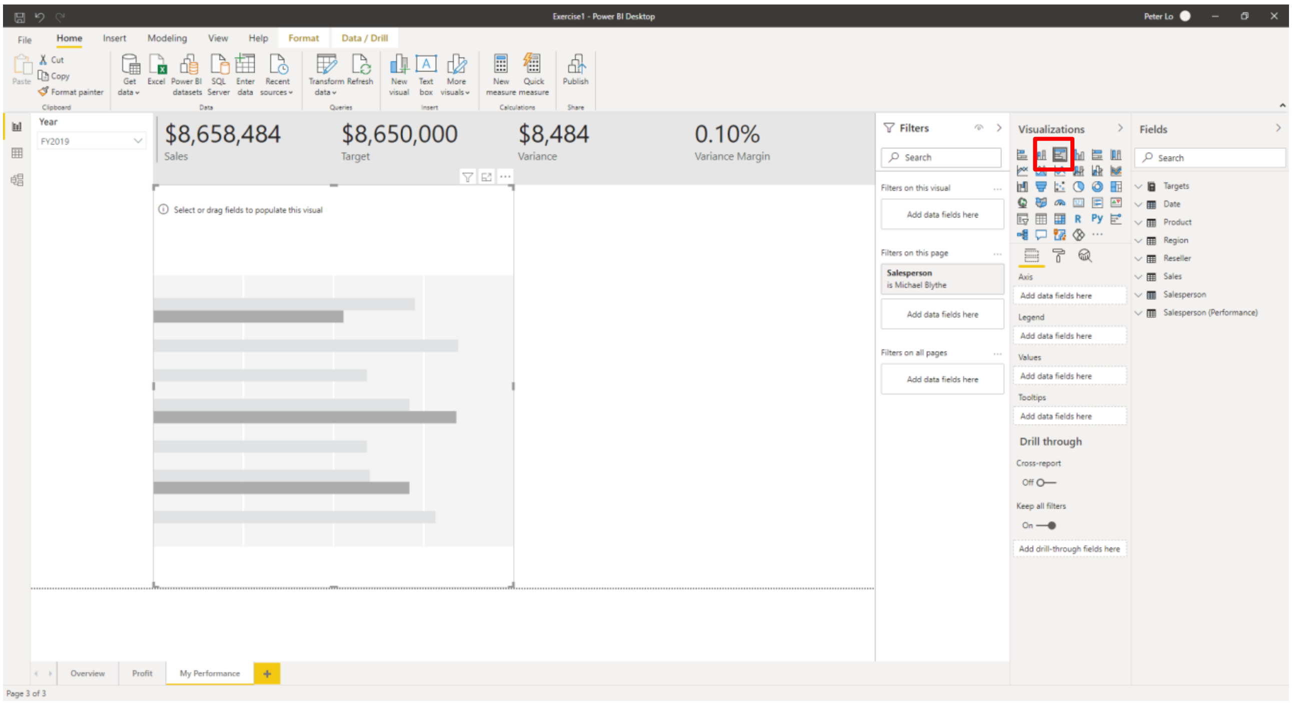
9. In the **Data Labels** group, increase the **Text size** property to **28pt**.



10. In the **Background** group, set the **Color** to a light gray color (#E6E6E6).

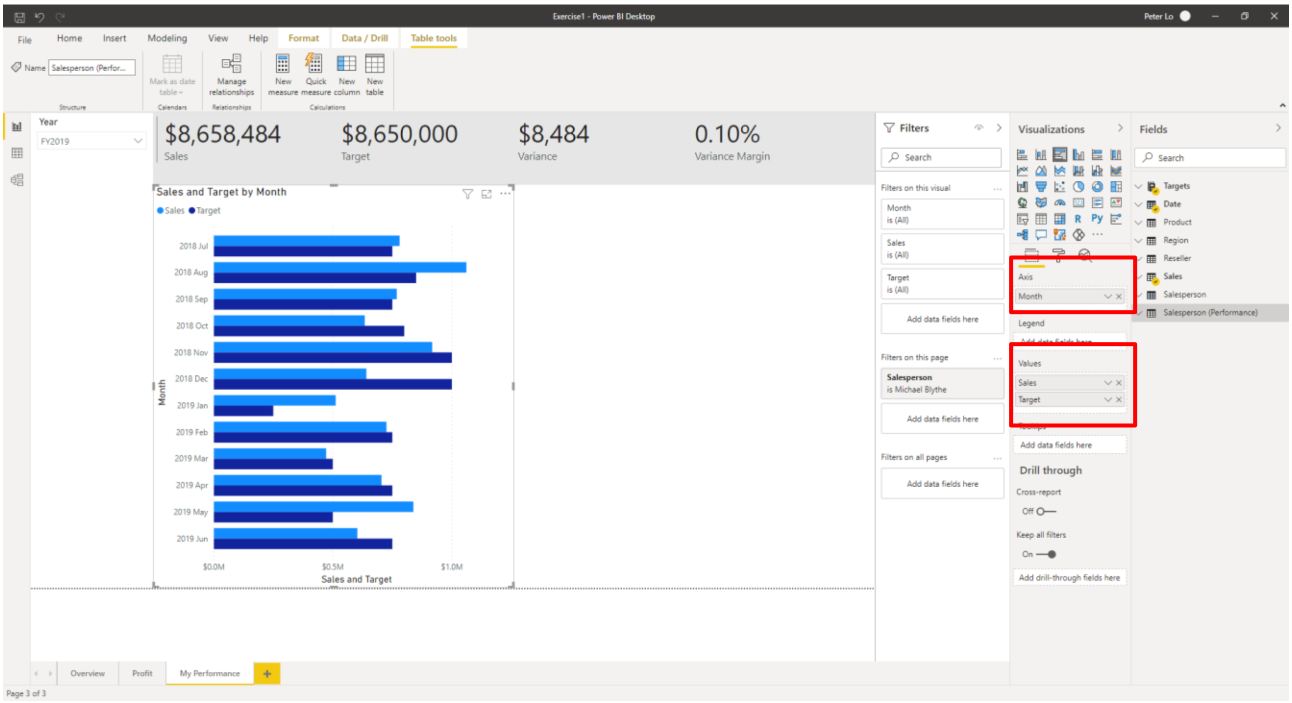


11. Add a **Clustered Bar Chart** visual, and then resize and reposition it so it sits beneath the multi-row card visual and fills the remaining height of the page, and half the width of the multi-row card visual.

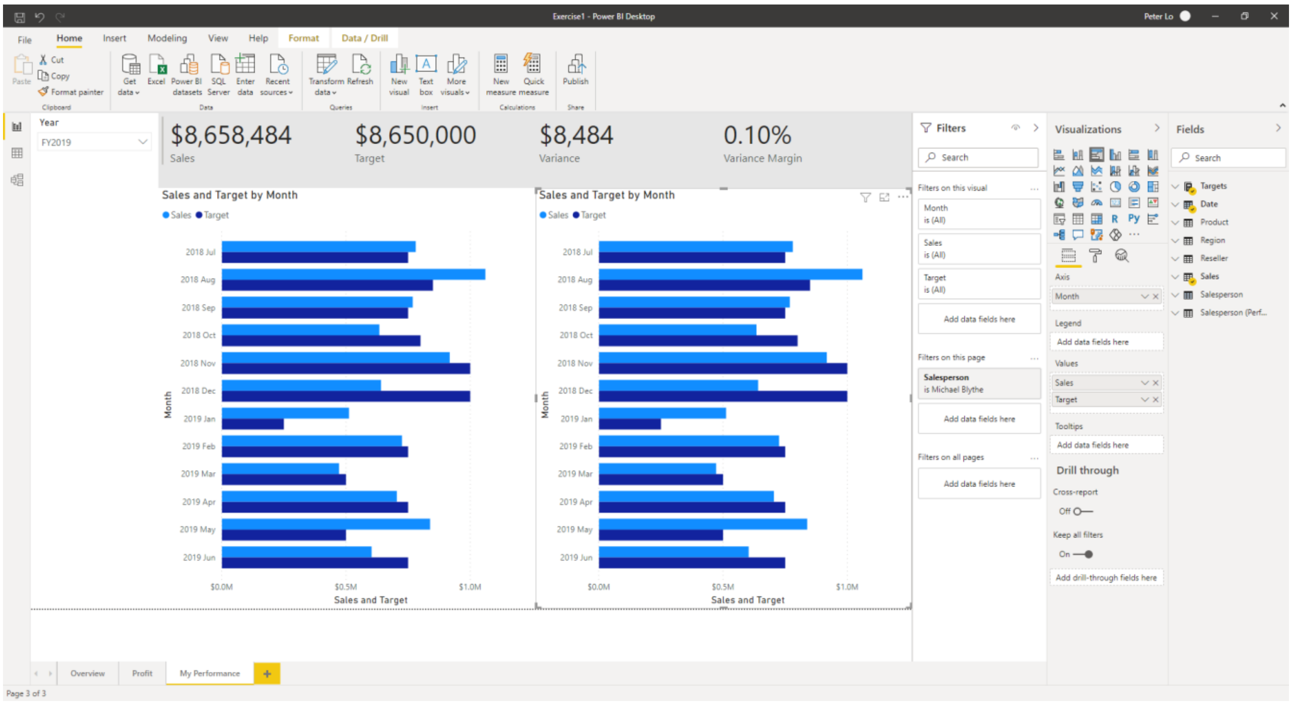


12. Add the following fields to the visual wells:

- Assign *Date* ➔ *Month* to **Axis**
- Assign *Sales* ➔ *Sales* to **Value**
- Assign *Targets* ➔ *Target* to **Value**



13. To create a copy of the visual, press **[Ctrl]** + **[C]**, and then press **[Ctrl]** + **[V]**. Position the copied visual to the right of the original visual.



14. To modify the visualization type, in the **Visualizations** pane, select **Clustered Column Chart**.