# **Power BI Tutorial Start Up**

* Create a Text Box called ***WWI Sales Data***
* Create a cluster Column Chart X-axis year and Y-axis Quantity
* Create a table where the column includes ***Description,*** **unit Price*, quantity,*** ***Total Excluding Price***, ***Profit***.
* Create a Card and add profit to the fields.

• Once the report opens, make sure you are viewing the ***Sales Data*** page.

**Q. What was the total profit for World Wide Importers?**

From the bottom left corner of the file, make sure the page you are viewing from ***Sales Data*** is on *Page 1*

Using the Get Data button, select *Text/CSV* from the list and load *DimDate.csv* from *Datasets/WWI.* Make sure to use the file in the *WWI* folder.

In the Model view, create a relationship between *FactSale 's* ***Invoice Date Key*** and *DimDate 's* ***Date.***

\* In the Report view, **select the existing bar chart** and then select *Calendar Year* from *DimDate* in the Data pane.

\* Make sure to use *Calendar Year* instead of *Calendar Year Label*. You can expand the *Data* pane by dragging its left-hand border.

\* In the Visualizations pane, drag Calendar Year to the *X-axis* rather than the *Y-axis*.

Q. **Based on your resulting visualization, which statement is true?**

1. Quantity of items sold per year has decreased every year.

2. Quantity of items sold per year has remained about the same through all years.

3. Quantity of items sold per year has only increased from 2013 to 2015.

4. Quantity of items sold per year has been increasing every year.

In the *Report view*, deselect any visuals you have selected by clicking a blank area of the canvas.

Q. **Select the year 2014 bar. How does the profit card change?**

- [ ] The card changes from 9.92M to 2.91M.

\* The card doesn't change and displays 9.92M.

\* The card changes from 9.92M to 3.16M.

Load the **Excel** file *DimEmployee.xlsx* from

*Datasets/WWI* using the *Excel workbook* button on the top menu. This is located next to the *Get data* option.

Create a relationship between *FactSale’s* *Salesperson Key* and *DimEmployee '*s *Employee Key*.

In the *Report view*, add a *slicer*.

Add the *Employee* field to the slicer, and change the slicer by going to Format section in the Visualizations pane, you can then navigate to Slicer Settings > Options › Style and switch from Vertical list to Dropdown.

Q. **Using the slicer you've just added, how much profit did salesperson "Taj Shand" generate for WWI in 2014? Round accordingly to the nearest $1,000. (answer format: $\_ \_K)**

Select the *Quan*tity of Items Sold column chart.

Select *Total Dry Items* and *Total Chiller Items* in the *Fields* pane.

Q. **Question: Based on the result, which statement is true about Wide World Importers?**

- [ ] Chilled items take up about 25% of the items sold every year.

- [ ] It seems like Wide World Importers only started selling chilled items in 2016.

- [ ] Most of the items Wide World Importers have sold are chilled.

De-select any selected visualization and add a table. If you don't have space, you can make the bar chart smaller, so you can add a table at the bottom of the page.

Add the dimension field *Employee* to the table.

Add the fact fields to the table: *Description, Quantity, Total Including Tax, and Profit.*

**Q. Using the table's total row, how much "Total Including Tax" did "Sophia Hinton" generate in 2016?**

\* Open the csv file *DimCustomer. csv* from *Datasets/WWI* folder on the desktop.

\* Select the Transform Data button to navigate to Power Query.

\* Remove the first row. It contains mostly blanks and does not provide any information.

\* Make the resulting first row the header row.

\* Delete the columns *Valid From* and *Valid To.*

\* Close and apply.

\* In the Fields pane, select the Edit Query menu option from *DimCustomer.*

**Q. In Power Query Editor window that has opened, how many steps are listed in the "Applied Steps" ' section?**

\* Click "Close & Apply" to close Power Query in case it is still open.

\* Check that Power BI recognized a relationship between *FactSale* and *DimCustomer.*

\* Add a new page tab in the Report view.

Make a Clustered Column Chart using *Buying Group* from *DimCustomer* and *Total Including Tax* from

*FactSale.*

Change it so that the value is the minimum of *Total Including Tax*.

**Q. According to total including tax, how much was the cheapest sale made to Tailspin Toys (answer format: 1.1?**

\* Make sure no bars are selected on the bar graph.

\* Create a Card visualization with the value *Credit Limit* from *DimCustomer.*

The card should show ? -, which is unexpected! Edit the query of *DimCustomer* to open up the Power Query Editor and fix the *Credit Limit* column.

\* Replace values so that ? s are replaced with blanks in *Credit Limit*.

\* Repeat so that - s are replaced with blanks for the *Credit Limit column*.

Change the data type of *Credit Limit* from Text to Decimal Number.

Close and apply and return to the Report view. In the card, change the value to be the average *Credit Limit.*

**Q. What is the average credit card limit of a Wide World Importers customer (answer format: $11.11K)?**

\* In the Data view of *FactSale,* select the

\* *Total Including Tax column.*

\* Using Column tools, change the format to Currency.

\* Change the number of decimal places shown to 2 instead of Auto.

\* Change the default aggregation from Sum to Average.

\* Repeat the same format and decimal place changes to the *Profit* column.

\* Add a card to your report and select *Total Including Tax*\* If applicable, clear any selections on the *Employee* slicer so that all employees are considered.

**Q. What does the "Total Including Tax" card now display? (answer format: $111.11)**

\* Load the dimension table *DimCity.csv* from the *Datasets/WWI* folder on the Desktop.

\* Go to the Model view and make sure a relationship is found between *DimCity* and *FactSale*.

\* In the Data view, change the Data category of *DimCity* 's *State Province* to "State or Province"

\* Make sure the default summarization for *Profit* from *FactSale* is "Average".

\* In the Report view, navigate to the second tab.

\* Create a Map visualization using *State Province* as Location and *Profit* as Bubble size.

\* Add a Slicer for the *Buying Group* field from the *DimCustomer* table. Arrange the report to your liking and add a title.

Q. **Using the map and the slicer, which state generates the highest average profit for the "Wingtip Toys"?**

- [ ] Washington

- [ ] Oregon

- [ ] Alaska

- [ ] California