

Introduction to Power BI

Contents

Setup	2
1 Introduction to Power BI	6
1.1 Overview of Power BI	6
1.2 The parts of Power BI	6
1.3 Use of Power BI and roles	6
1.4 Power BI flow	7
1.5 Use Power BI	7
1.6 Building blocks of Power BI	8
1.7 Power BI Services	10
2 Importing Dataset and Modelling	12
2.1 Importing data into Power BI Desktop	12
2.2 Dealing with errors	14
2.3 ‘Applied steps’ in modelling data	16
3 Plotting	18
3.1 Visualization Panel	18
3.2 Plot modifications	26
3.3 Filters	28
3.4 Edit interactions	32
3.5 Explore Marketplace for other visualizations	33
4 Saving and Exporting	36
4.1 Saving as pbix files	36
4.2 Exporting and publishing report	37
5 Next steps	42
5.1 Deepen your understanding	42
5.2 Join the community	42

Setup



These are the course notes for the “Introduction to Power BI” course given by the Monash Bioinformatics Platform¹ for the Monash Data Fluency² initiative. Our teaching style is based on the style of The Carpentries³.

- PDF version for printing⁴
- ZIP of data files used in this workshop⁵

During this workshop we will be using Power BI Desktop installed on your computer. There are several ways to download Power BI Desktop, depending on which system you use.

1. Windows

- Windows Store

The first option is to visit Windows Store to get the Power BI Desktop app⁶ and install it. Note that the system requirements is Windows 10 version 14393.0 or higher.

¹<https://www.monash.edu/researchinfrastructure/bioinformatics>

²<https://monashdatafluency.github.io/>

³<https://carpentries.org/>

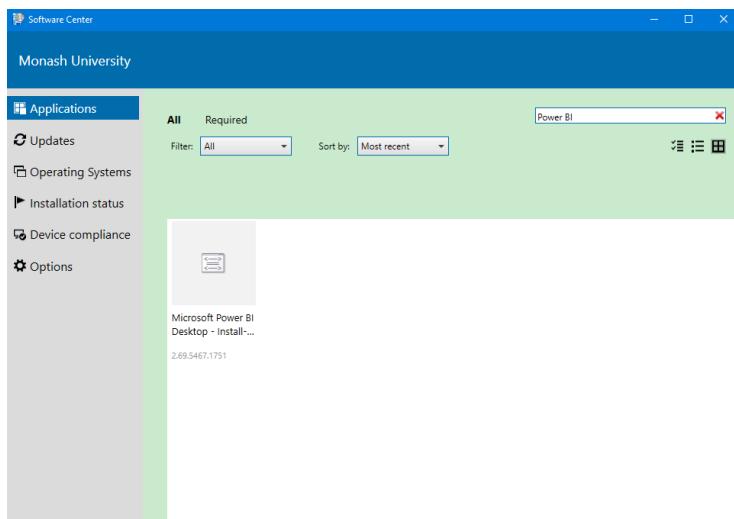
⁴https://github.com/MonashDataFluency/Power_BI/raw/master/docs/powerbi-intro.pdf

⁵https://github.com/MonashDataFluency/Power_BI/raw/master/docs/powerbi-files.zip

⁶<https://www.microsoft.com/en-au/p/power-bi-desktop/9ntxr16hnw1t?activetab=pivot-overviewtab>



If you are using a Monash machine, try searching “**Power BI**” in “Software Center⁷” and install it. For questions concerning installation on a Monash machine, you may contact eSolutions⁸ for help.



- **Power BI website**

You can also download Power BI Desktop from the Power BI website⁹ and install it as an application on your computer.

⁷<https://www.monash.edu/esolutions/software/install-software-on-monash-devices>

⁸<https://www.monash.edu/esolutions/contact>

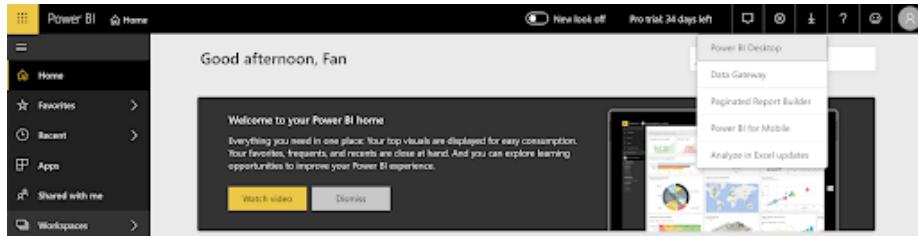
⁹<http://go.microsoft.com/fwlink/?LinkID=521662>

CONTENTS

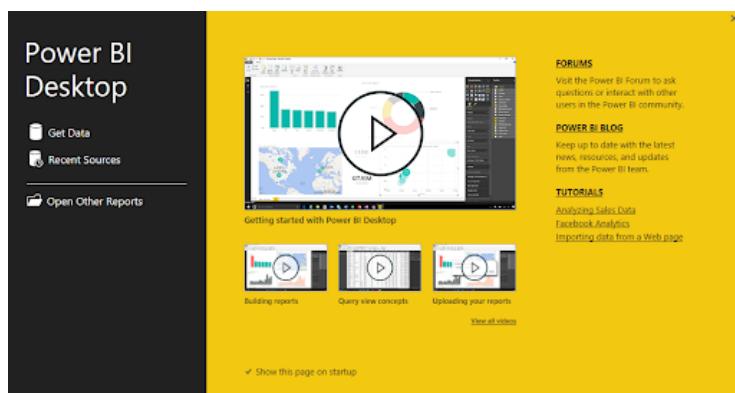


• Power BI service

Or if you prefer Power BI Service¹⁰, you can get it by clicking the “Download” button in the upper right and selecting “Power BI Desktop”. To use Power BI service, you may need to sign in¹¹ your Microsoft account.



After the setup process, you will be able to see the following Start Screen.



2. MacOS

Power BI Desktop is not available on Macs. However, you can run a Windows session on your Mac via BootCamp¹² or using a similar application.

¹⁰<https://app.powerbi.com/home>

¹¹<https://powerbi.microsoft.com/en-us/landing/signin/>

¹²<https://support.apple.com/en-au/HT201468>

3. Linux

Currently it is not possible to install Power BI desktop on Linux. You can choose to install it on a Windows Virtual Machine like VirtualBox¹³ or using a similar application.

After installing Power BI Desktop, you can sign up for Power BI using your Monash account here¹⁴. By signing in the Power BI Desktop, you will be able to save your work and later publish it to the Power BI service.

Data

Download the data file `gap-minder.csv`¹⁵ for the course.

Source code

This book was created in R using the `rmarkdown` and `bookdown` packages.

- GitHub page¹⁶

Authors and copyright

This course is developed for the Monash Data Fluency Team.



This work is licensed under a CC BY-4: Creative Commons Attribution 4.0 International License¹⁷. The attribution is “Monash Bioinformatics Platform” if copying or modifying these notes.

Data files are derived from Gapminder, which has a CC BY-4 license. The attribution is “Free data from www.gapminder.org”. Refer to the Gapminder site¹⁸ for the original form of the data if using it for other uses.

¹³<https://www.virtualbox.org/wiki/Downloads>

¹⁴https://signup.microsoft.com/signup?sku=a403ebcc-fae0-4ca2-8c8c-7a907fd6c235&email=&ru=https%3A%2F%2Fapp.powerbi.com%3Fpb1_source%3Dweb%26redirectedFromSignup%3D1%26noSignUpCheck%3D1

¹⁵https://github.com/MonashDataFluency/Power_BI/raw/master/docs/powerbi-files.zip

¹⁶https://github.com/MonashDataFluency/Power_BI

¹⁷<http://creativecommons.org/licenses/by/4.0/>

¹⁸<https://www.gapminder.org>

Chapter 1

Introduction to Power BI

1.1 Overview of Power BI

Microsoft Power BI is a collection of apps, software services and connectors that come together to turn unrelated data into visually impressive and interactive insights. Power BI can work with simple data sources like Microsoft Excel and complicated ones like cloud-based or on-premises hybrid Data warehouses. Power BI has the capabilities to easily connect to your data sources, visualise and share and publish your findings with anyone and everyone.

Power BI is simple and fast enough to connect to an Excel workbook or a local database. It can also be robust and enterprise-grade, ready for extensive modeling and real time analytics. This means it can be used in a variety of environments from a personal report and visualisation tool to the analytics and decision engine behind group projects, divisions, or entire corporations.

1.2 The parts of Power BI

Power BI constitutes of a Microsoft Windows desktop application called Power BI Desktop, an online SaaS (Software as a Service) called Power BI Service and a mobile Power BI apps that can be accessed from Windows phones and tablets, and also available on Apple iOS and Google Android devices.

These three elements— **Desktop**, the **Service**, and **Mobile** apps - are the backbone of the Power BI system and lets users create, share and consume the actionable insights in the most effective way.

1.3 Use of Power BI and roles

The use of Power BI could depend on the role that you are in. For example: if you are the stakeholder of a project, then you might want to use **Power BI Service** or the Mobile **app** to have a glance at how the business is performing. But on the other hand, if you are a developer, you would be using **Power BI**

Desktop extensively to publish Power BI desktop reports to the Power BI Service.

In the upcoming modules we would be discussing about these three components - **Desktop**, **Service** and **Mobile** apps - in more detail.

1.4 Power BI flow

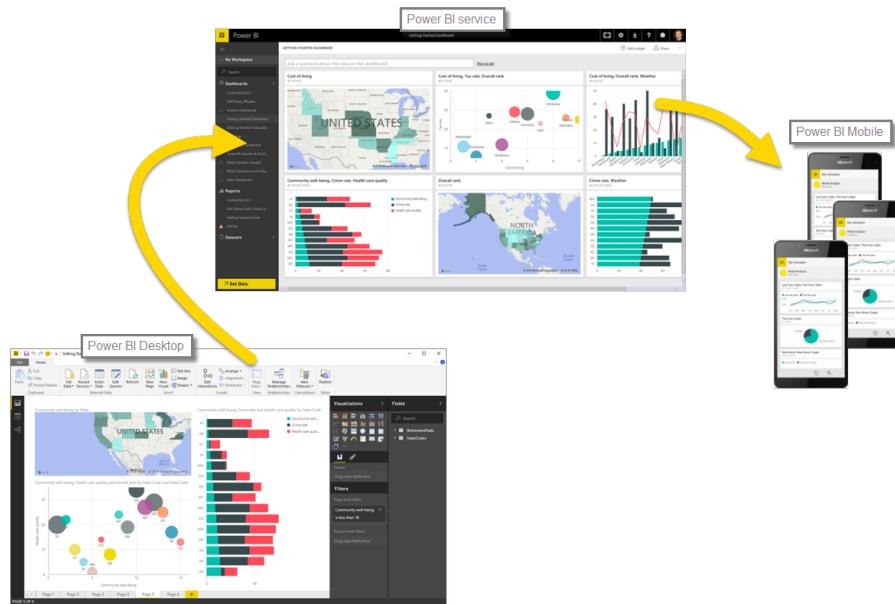
Generally, the flow starts at the Power BI Desktop, where a report is created. This created report can be published to the Power BI Service and finally shared so that the users can use it from the Mobile apps.

This is the most common approach for sharing reports. There are other approaches but we will stick to this flow for this entire tutorial to help learn the different aspects of Power BI.

1.5 Use Power BI

The **common** flow of activity in Power BI looks like this:

1. Bring data into Power BI Desktop, and create a report.
2. Publish to the Power BI service, where you can create new visualizations or build dashboards.
3. Share dashboards with others, especially people who are on the go.
4. View and interact with shared dashboards and reports in Power BI Mobile apps.



Depending on the user role, the user might spend most of the time in one of the three components than the other.

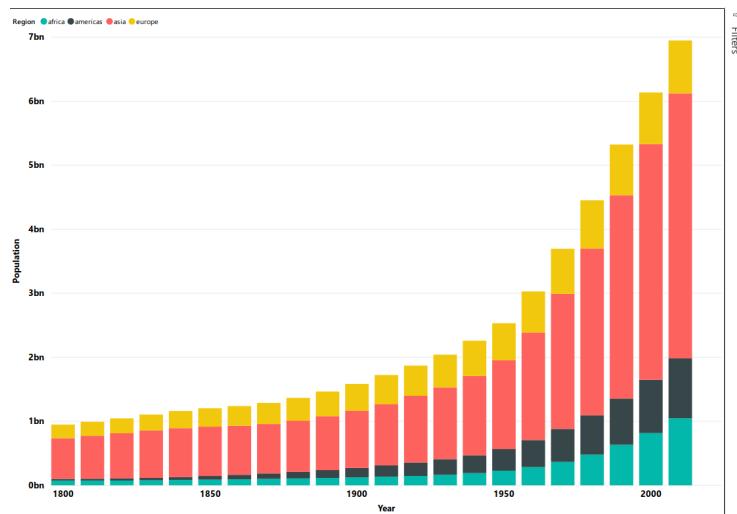
1.6 Building blocks of Power BI

The basic building blocks in Power BI are:

- Visualizations
- Datasets
- Reports
- Dashboards
- Tiles

1.6.1 Visualizations

A visualization is a representation of data in a visual format. It could be a line chart, a bar graph, a color coded map or any visual way to present the data.



Visualizations can be a simple number representing a significant calculation or it could be more complex like multiple charts showing the proportion of users participating in a survey. The main idea of visualisation is to show the data in a way that tells the story that is lying underneath it. Like the saying goes: a picture says a thousand words.

1.6.2 Datasets

A **dataset** is a collection of data that Power BI uses to create its visualizations. You can have a simple dataset that's based on a single table from a Microsoft Excel workbook, similar to what's shown in the following image.

name	year	population	gdp_per_capita	life_exp	region	oecd	g7	lat	long	income2012
Afghanistan	1800	3280000	603	28.21	asia	FALSE	FALSE	33	66	low
Albania	1800	4104493	687	35.4	europe	FALSE	FALSE	41	20	upper_mid
Algeria	1800	2500000	715	28.82	africa	FALSE	TRUE	38	3	upper_mid
Angola	1800	2600000	591	36.07	africa	FALSE	TRUE	42	50.77	1.52201
Angola	1800	2507029	618	36.98	africa	FALSE	TRUE	42.5	18.5	upper_mid
Anguilla and Barbuda	1800	37000	757	33.54	americas	FALSE	TRUE	17.05	-61.8	high
Argentina	1800	5340000	1507	33.2	americas	FALSE	TRUE	44	-44	upper_mid
Armenia	1800	413320	514	34	europe	FALSE	FALSE	40.25	-45	lower_mid
Australia	1800	351070	814	34.04	asia	TRUE	FALSE	-25	135	high
Austria	1800	820587	1847	34.4	europe	TRUE	FALSE	47.333333	13.333333	high
Azerbaijan	1800	87990	775	29.17	europe	FALSE	FALSE	40.5	47.5	upper_mid
Bahamas	1800	277059	1445	35.18	americas	FALSE	TRUE	25.04092	77.37722	high
Bahrain	1800	84471	1229	36.01	asia	FALSE	TRUE	26.033333	50.77	high
Bangladesh	1800	19327300	896	25.5	asia	FALSE	TRUE	24	90	lower_mid
Barbados	1800	81179	913	32.12	americas	FALSE	TRUE	18.166667	28.513333	high
Belarus	1800	2350027	908	36.2	europe	FALSE	FALSE	53	28	upper_mid
Belgium	1800	3131317	3411	40	europe	TRUE	FALSE	50.75	4.5	high
Belize	1800	25320	579	26.5	americas	FALSE	TRUE	17.49952	28.2976	upper_mid
Benin	1800	636559	597	31	africa	FALSE	TRUE	9.5	2.25	low
Bhutan	1800	89899	629	28.8	asia	FALSE	TRUE	27.5	90.5	lower_mid

Dataset can also be a combination of many different sources, which can be filtered using Power BI and combined into one to use.

For example: One data source contains countries and locations in the form of latitude and longitude. Another data source contains demographics of these countries like population and GDP. Power BI can combine these two data sources into one dataset which can be used for visualizations.

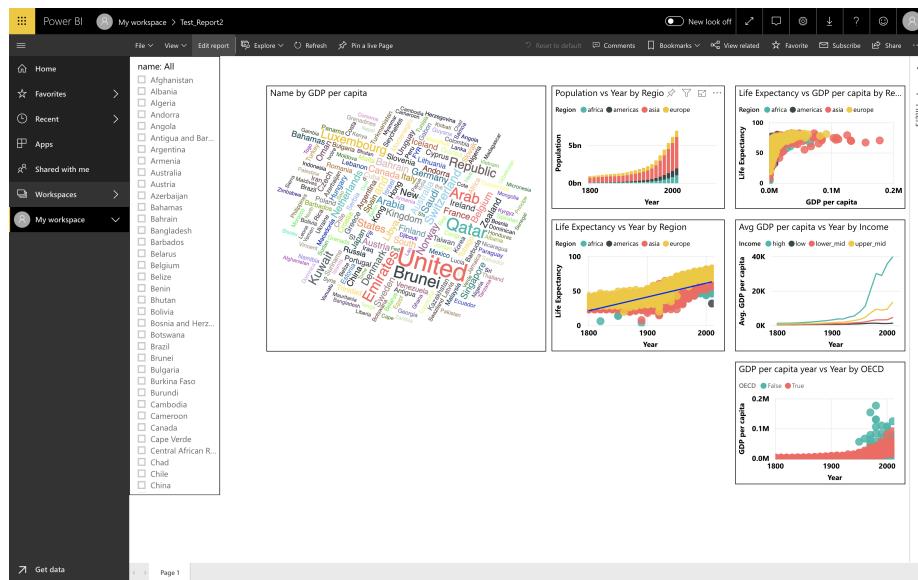
An important feature of Power BI is the ability to connect to various data sources using its connectors. Whether the data you want is in Excel or a Microsoft SQL Server database, in Azure or Oracle, or in a service like Facebook, Salesforce, or MailChimp, Power BI has built-in data connectors that let you easily connect to that data, filter it if necessary, and bring it into your dataset.

After you have a dataset, you can begin creating visualizations that show different portions of it in different ways, and gain insights based on what you see. That is where reports come in.

1.6.3 Reports

In Power BI, a **Report** is a collection of visualizations that appear together on one or more pages. A report in Power BI is a collection of items that are related to each other. The following image shows a report that you will be creating by the end of the session. You can also create reports in the Power BI service.

CHAPTER 1. INTRODUCTION TO POWER BI



Reports let us create and structure visualizations on pages based on the way the we want to tell the story.

1.6.4 Dashboards

A Power BI dashboard is a collection of visualizations from a single page that you can share with others. Often it is a selected group of visualizations that provide quick insight into the data or story you are trying to present.

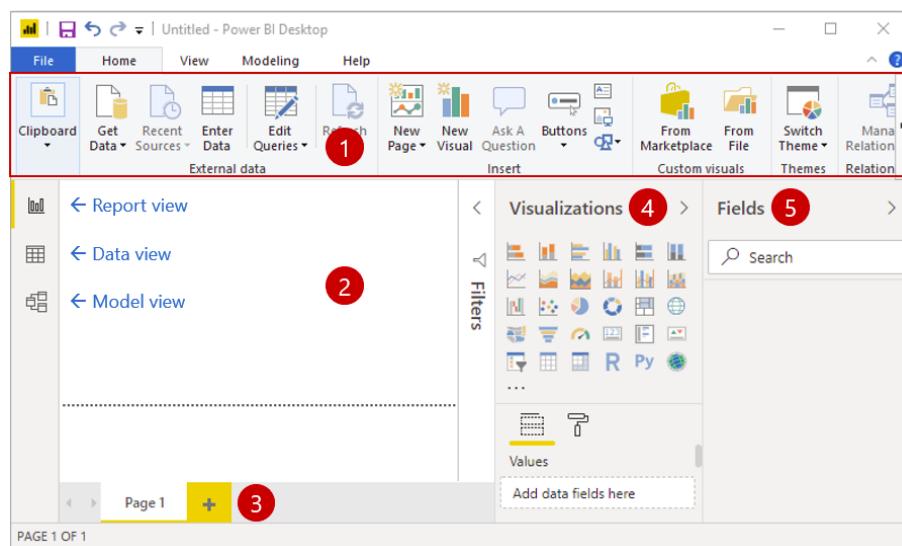
A dashboard must fit on a single page, often called a canvas (the canvas is the blank backdrop in Power BI Desktop or the service, where you put visualizations). Think of it like the canvas that an artist or painter uses — a workspace where you create, combine, and rework interesting and compelling visualizations. You can share dashboards with other users or groups, who can then interact with your dashboards when they're in the Power BI service or on their mobile device.

1.7 Power BI Services

1.7.1 Overview of Power BI Desktop

Power BI Desktop is a free application for PCs that lets you gather, transform, and visualize your data. In this module, you'll learn how to find and collect data from different sources and how to clean or transform it. You'll also learn tricks to make data-gathering easier. Power BI Desktop and the Power BI Service work together. You can create your reports and dashboards in Power BI Desktop, and then publish them to the Power BI Service for others to consume.

CHAPTER 1. INTRODUCTION TO POWER BI



1. **Ribbon** - Displays common tasks that are associated with reports and visualizations.
2. **Report view, or canvas** - Where visualizations are created and arranged. You can switch between **Report**, **Data**, and **Model** views by selecting the icons in the left column.
3. **Pages tab** - Located along the bottom of the page, this area is where you would select or add a report page.
4. **Visualizations pane** - Where you can change visualizations, customize colors or axes, apply filters, drag fields, and more.
5. **Fields pane** - Where query elements and filters can be dragged onto the **Report** view or dragged to the **Filters** area of the Visualizations pane.

Chapter 2

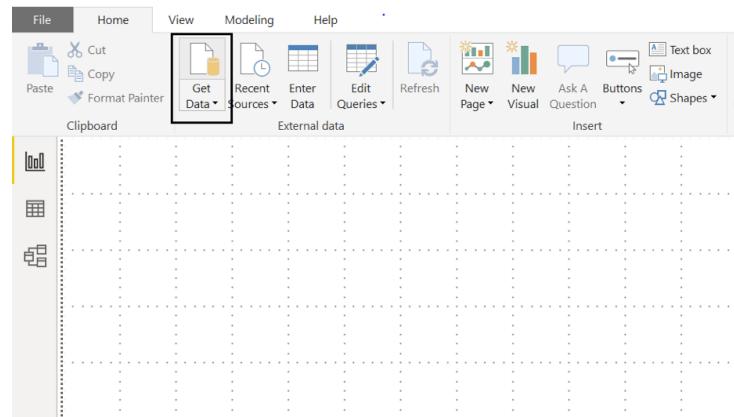
Importing Dataset and Modelling

Power BI can connect to a whole range of data sources from Excel sheets and local databases to several Cloud services. Currently, over 60 different cloud services have specific connectors to help you connect with generic sources through XML, CSV, text, and ODBC. Let us start connecting to one of the data sources. For today we will be working on the `gap_minder_map.csv` file.

2.1 Importing data into Power BI Desktop

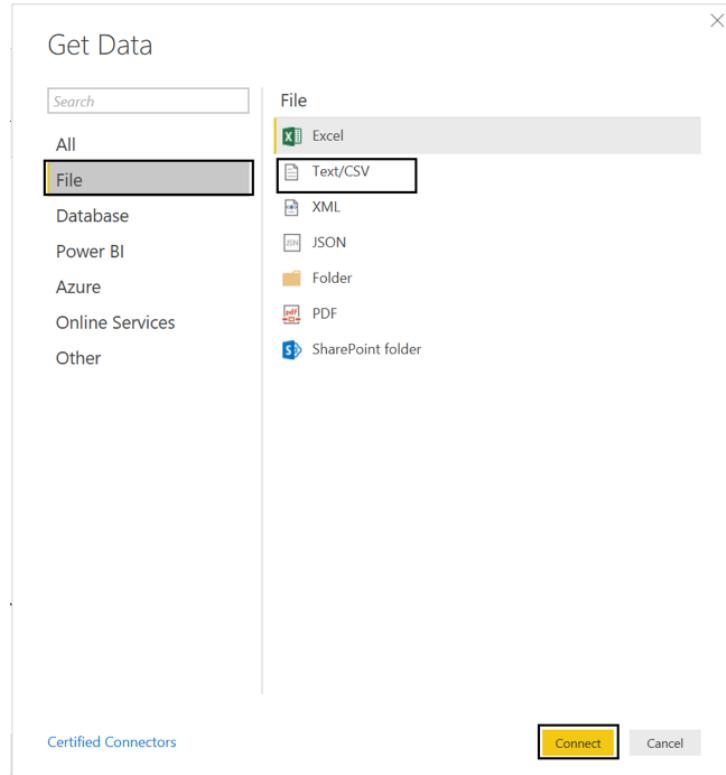
Power BI Desktop has a **Get Data** button from the ribbon on the **Home** tab. In Power BI, there are all sorts of different data sources available. Select a source to establish a connection. Depending on your selection, you will be asked to find the source on your computer or network, or be prompted to sign in to a service to authenticate your request.

As our first step to import the dataset/file into Power BI, we click on the Get Data icon on the ribbon of Home tab.



CHAPTER 2. IMPORTING DATASET AND MODELLING

Once we select this, we go ahead and select the **CSV option** under the **file** subheading.



Then browse the file and select the necessary CSV file. Press on **Connect** to have a quick preview of the file. Once we click on **Load**, Power BI will successfully import the file. Any errors will then pop up ready to be analysed and fixed.

The screenshot shows the Power BI Desktop application window. The ribbon at the top has tabs for Home, Insert, Modeling, and Help. The main area displays the 'gap_minder_map.csv' dataset in a preview pane. The preview shows the same columns as the previous screenshot: name, year, population, gdp_per_cap, life_exp, region, onesd, g77, lat, long, income2017. The Fields pane on the right lists fields like 'name', 'year', 'population', etc., with their respective data types. The status bar at the bottom shows the user's name as 'Ranjeet Singh'.

If there are any errors in the data load, select **View errors** to check any detected errors. Alternatively, close the pop up and click **Edit queries** to check for any errors. This will query and list the errors in the data.

2.2 Dealing with errors

2.2.1 Checking for automatically detected errors

Once queried, any detected errors will be displayed. Clicking on these errors will provide a brief description on what might have gone wrong. There will be some errors showing up in your data, click on the errors to see what has caused the issue.

2.2.2 Changing data type of column

One of the most common errors is the detection of the datatype of a particular column. While loading the data, Power BI automatically assigns a column type based on the first lines of data. This can cause errors or other problems if the automated data type is not suited for that column. You may need to change data types of the columns to a relevant type for your data model.

Any changes to the data needs to be done under the **Data file** listed under **Other Queries**.

The **life_exp** column is displaying as text data. This is a problem as we may want to do numerical calculations with this data. We should change this to a numerical data type.

- Select the **gap-minder** file.
- Right click on top of the column and select **Change type**.
- Change to **Decimal Number**.

You can replace a current step in the query with **Replace current step** or add a new step to the query with **Add new step**.

- Click **Add new step**.

Once necessary changes are made, it is important to refresh and check if the change was applied. We can do this by clicking on the **Refresh Preview** button on the ribbon.

You will notice that this has created errors due to several cells containing N/A.

2.2.3 Replacing values

Data can have erroneous and missing values for a number of reasons. Missing data is represented as `null` in the data. You will often need to deal with such values and fix or remove them.

You can view the data in the **Data** section on the left sidebar. By applying a filter to a particular column, the null values can be analysed. To replace any null values, go to the **Query Editor** and use the **Replace values** option in the **Transform** tab. You can also remove error values by right-clicking a column and selecting the **Remove errors** option.

Look in **Errors in gap-minder** in the Query Errors folder. You will notice that all the years for 1820 have a whitespace in it that is causing an error.

- Return to the gap-minder data .
- Right click the `year` column and select **Replace errors**.
- Replace this with 1820.

This will replace all errors with the value 1820. In this case this works as only one value is causing an issue. You can use **Replace values** to find and replace several values.

Challenge 1: Replace missing values

Use the **Replace values** option on the `oecd` column to replace the error values. Use the **Remove errors** option on the `life_exp` column to remove the error values caused by the blanks. Use the **Replace values** option on the `gdp_per_cap` column to replace the blank values.

2.2.4 Final notes on dealing with errors

Replacing error and missing values is not always a direct operation. Most of the time, these values must be carefully analyzed and replacement values need to be

computed based on several factors. While this can be done with in Power BI, this is not a key capability of Power BI. Furthermore these changes do not affect the source data set and are only represented in Power BI.

The best approach is to clean up and eliminate errors from your data before you import into Power BI. This may take several iterations as Power BI can help identify the problems with your data set.

Power BI does ignore blank and error values when it comes to analysis and visualisation but this may not always be the best approach.

Cancel the last two steps in the **Applied steps** by clicking on the red crossmark right next to **Removed Errors** and **Replaced Value**.

2.3 ‘Applied steps’ in modelling data

2.3.1 Renaming columns

Columns from raw data can be difficult to read or meaningless. Renaming the columns in your query to a meaningful name will make it easier for you and your audience to understand your data. This will often save you trouble in the future when it comes to working and presenting the data.

There are two ways to rename the columns in Power BI. Right-clicking on the header of the column gives you a menu of functions that you can do to the column. Select **Rename** to rename the column. You can also click on the column and then click on the **Transform** tab, from here you are presented a variety of transformation functions for the column. From here you can click on **Rename**.

- Right-click on the `name` column header, click on **Rename** and rename the column to **Country**.
- Click on the header for `life_exp`. Click on the **Transform** tab and click **rename**. Rename the column to **Life expectancy**.

2.3.2 Adding and removing columns

2.3.2.1 Removing columns

Often when dealing with raw data you will find columns that are meaningless or unsuitable for your analysis. You can remove these columns in Query to eliminate clutter and streamline the data set making it easier to work with.

There are two ways to remove columns in Power BI. As in renaming a column, you can right-click the header, which will present a menu with the option to **Remove**. You can also click on the column, click on the **Home** tab and then click **Remove Columns**.

You may not need the `g77` and `oecd` information.

- Right-click on the `g77` column header, click on **Remove**
- Left-click on `oecd` column header, click on **Home** tab, click **Remove Column**

2.3.2.2 Adding columns

Just as you would remove unsuitable data from your queries, you may need to add new columns to your data. There are a variety of options in Power BI to add different columns. Click on the **Add Column** tab to see the ways you can add a column.

- Click on `gdp_percap`, click on the **Add Column** tab, click **duplicate** to create a separate column to run calculations on.

Challenge 2: Add

Perform a simple mathematical operation and add this as a new column. Let's say you want to calculate Total Gross Domestic Products (GDP) per country. As $\text{Total GDP} = \text{Population} \times \text{GDP per capita}$, using the new `gdp_percap` column you created in the previous example, use **Custom Column** to create a new column with Total GDP per country.

2.3.3 Navigating ‘applied steps’ and undoing

It is important to know what sort of transformations the data has gone through to understand the current state of your data. These steps are listed on the **Applied Steps** section on the **Query Editor**. Sometimes these steps might need to be moved up or down based on the required application. These steps can also be removed by clicking on the red crossmark next to the step. This will undo the action it performs and returns the data to the previous stage.

2.3.4 Refreshing data ready for analysis

Always refresh your data when you are ready to do your analysis and visualisation. Clicking the Refresh option will refresh the data and rerun all your queries. This will show any issues or errors with your data or your queries and ensure that all the data is up to date and ready for analysis.

Once all the required changes are done, select **Close & Apply** going back to the main Power BI Desktop interface.

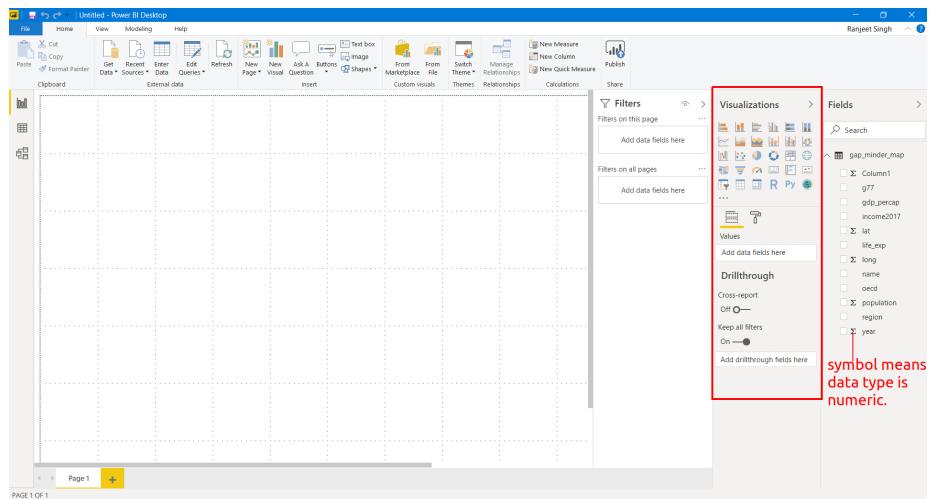
Chapter 3

Plotting

In the previous chapter, we saw how to import data into Power BI. We also did some basic pre-processing of data like cleaning the data, changing the type of data, and dealing with null and error values. In this section, we are going to work with our already processed data.

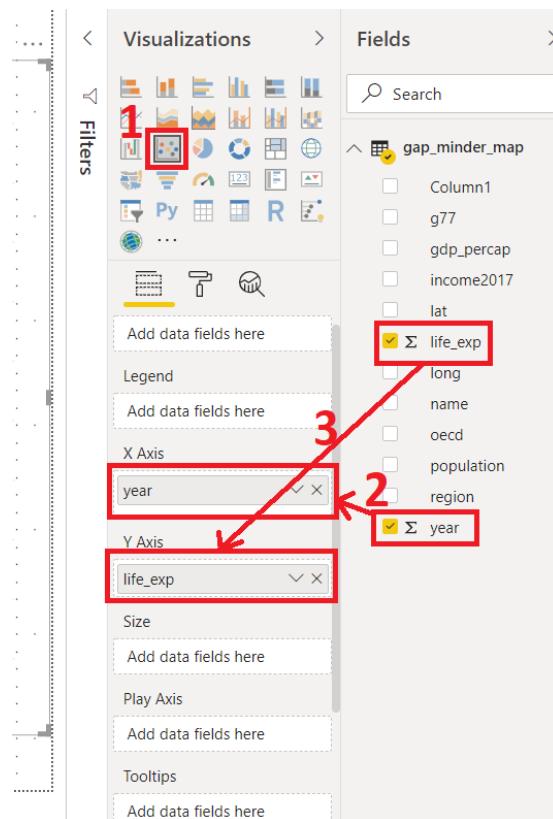
3.1 Visualization Panel

We touched upon the different panels present in the Power BI interface. We will now explore the different panels dedicated to creating and formatting charts in detail. One of the panels is the **Visualization panel** highlighted in the Red box. It contains various types of charts that you can create to visualize your data. Some of the available chart types are - Stacked bar chart, Line chart, Area chart, Scatter plot, Pie chart, etc. You can also import a custom visual from a file or the marketplace if you click on the ... icon. We will explore that in the later section.



3.1.1 Scatter plot

Let's create our first chart, a Scatter plot. The first step to plot any kind of plot in Power BI is to select the plot template/type from the **Visualization panel**. Click on the scatter chart icon in the visualization panel and drag the columns to the respective -Axis field as shown in the below figure.



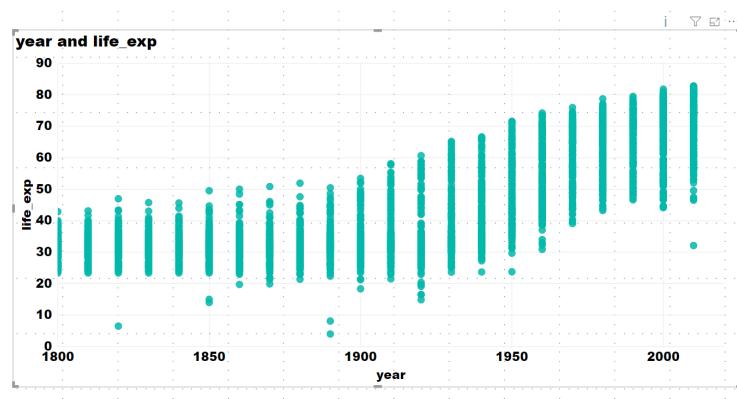
We want to see how life expectancy `life_exp` varies with time `year` in years. After dragging the columns to their respective fields, we get our first scatter plot.

This plot does not seem entirely correct.

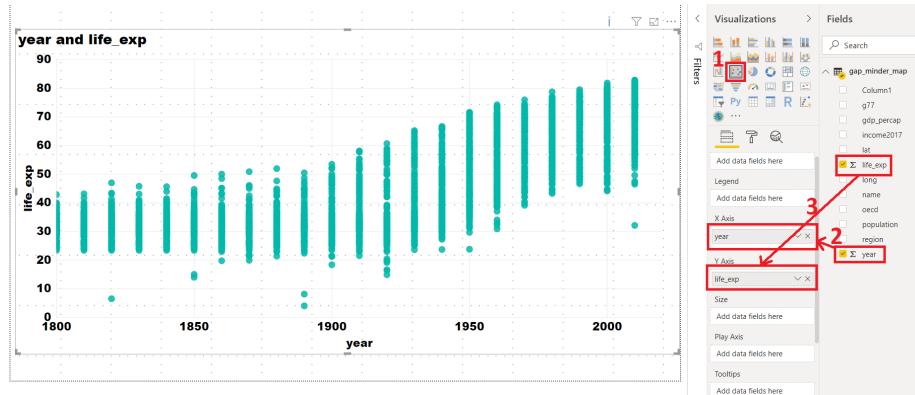
- Click the drop down on both `life_exp` and `year` fields. These fields are being automatically summarized.
- Click don't summarize.

PowerBI automatically summarizes numerical data. Be aware and check this when you add new numerical data to visualization fields.

An overall increasing trend can now be seen after year 1900.



The final interface will look like the image below. The plot will be at the left of the **Visualization panel**.



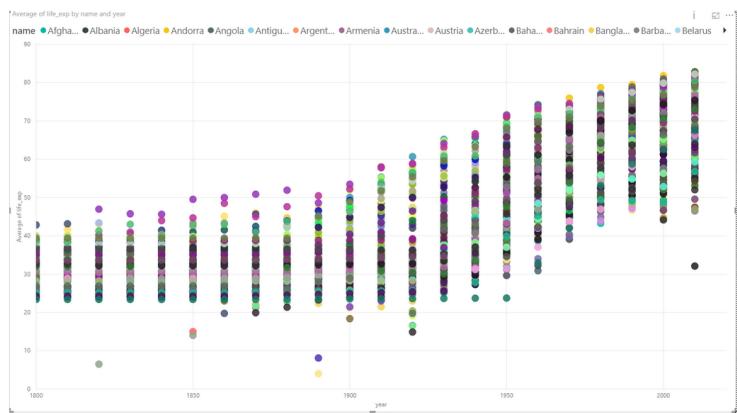
In general, this will be the procedure to create any type of plot in Power BI i.e. select the chart type from the **Visualization panel** and then drag data to the relevant fields.

The above scatter plot is not informative. Let's explore what else we can do with this plot.

X-Axis: year

Y-Axis: life_exp

Legend: country

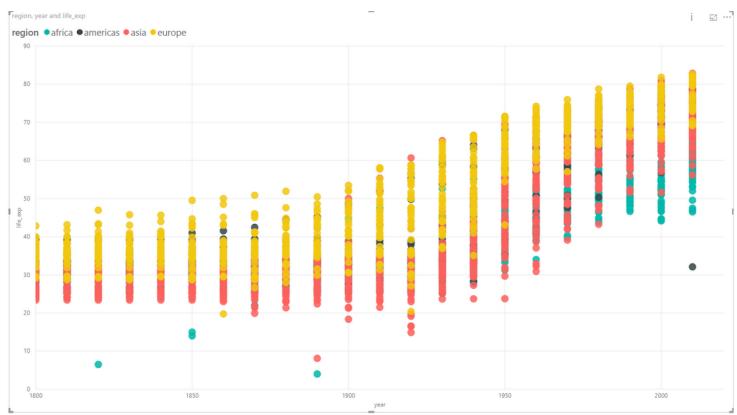


We have colored each dot by the country. This plot shows the trend of life expectancy for **each country** with years. Since there are so many countries in our data, this plot looks messy, unclear and our plot legend “explodes”.

Let's make this better.

Use the following parameters to create your chart:

X-Axis: `year`
 Y-Axis: `life_exp`
 Legend: `region`



This plot colors each data point by the region where the country is located. The `summarize` option summarizes the life expectancy `life_exp` for each region.

In the same chart, try the following:

- Size: By population
- Report what follows.

Challenge 1 Scatter plot

Create a chart with the following options:

X-Axis: year

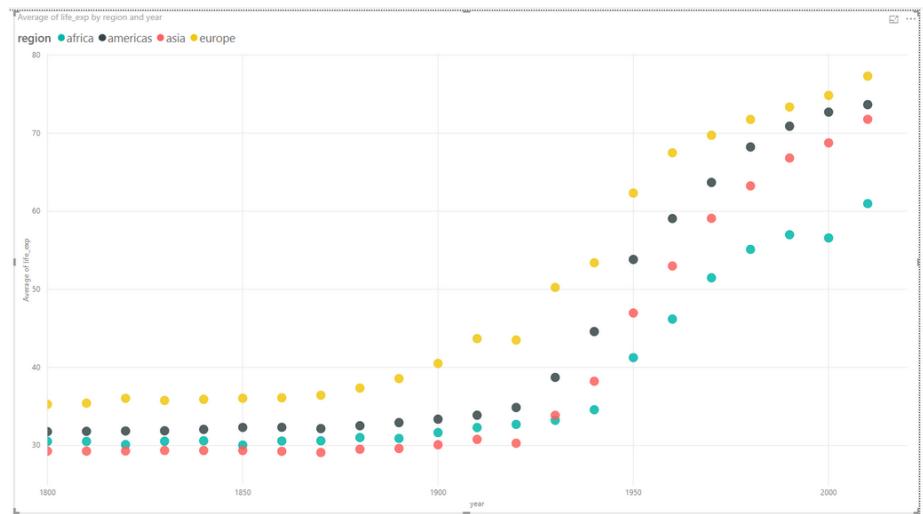
Y-Axis: life_exp

Legend: By region

Find the **Average** life expectancy of each region by year.

Challenge 1: Solution

This shows the average of `life_Exp` in all countries in a given region, and plots it.



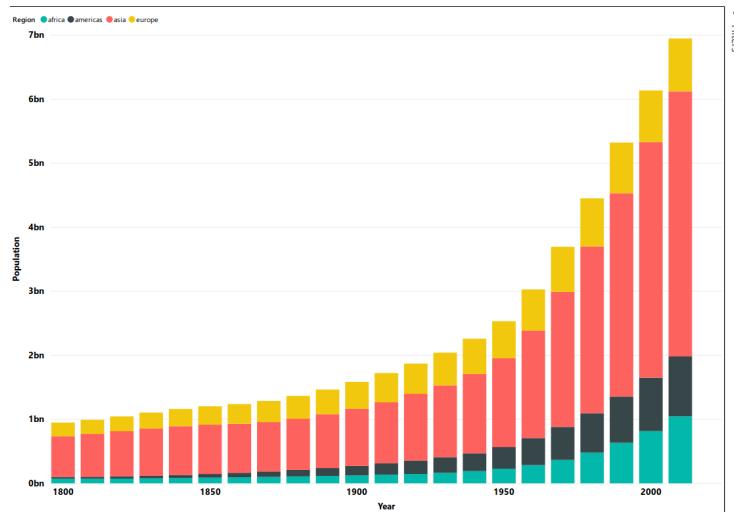
3.1.2 Bar plot

Select the bar chart from the **Visualization panel** and drag the following columns:

Axis: Year

Value: Population

Legend: By region

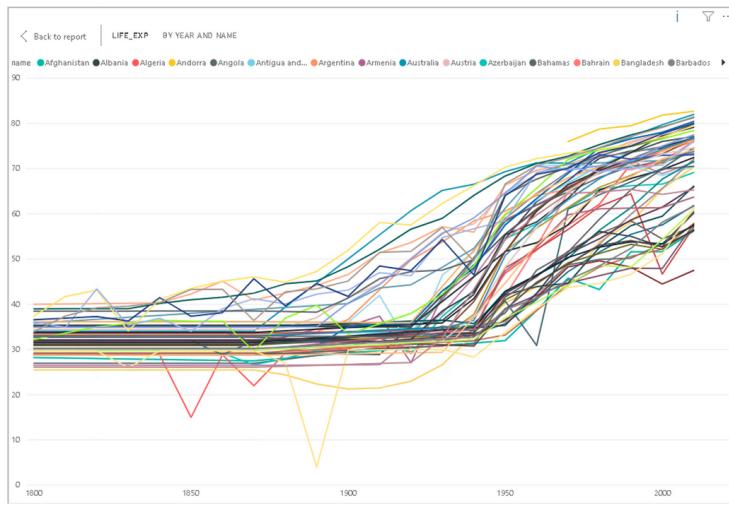


This bar plot shows population variation over time (in years) for all 4 regions.

3.1.3 Line chart

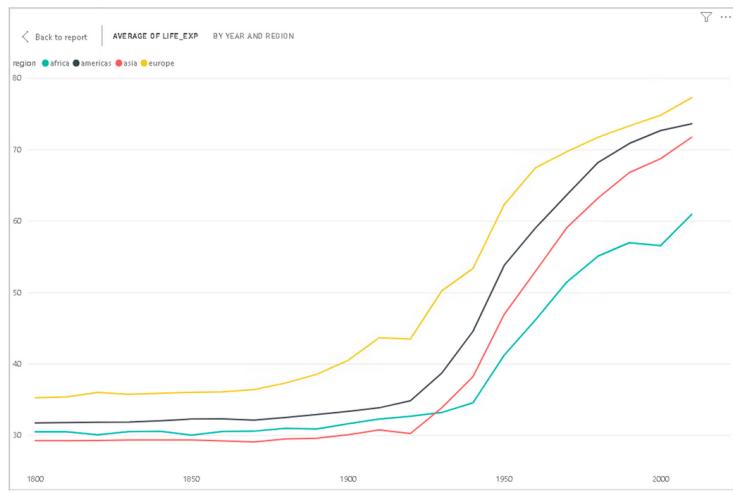
Select a line chart from the **Visualization panel**. Drag and drop the following columns:

Axis: Year
Values: Life_exp
Legend: By name



We get differently colored lines for each country. Now try changing the Legend to by `region`.

Axis: Year
Values: Average of Life_exp. Select Average
Legend: By region



Power BI computes average of Life expectancy for countries in each region and shows four average lines corresponding to four regions.

3.1.4 Changing visualizations

As you can see from your line chart, this uses the same data as your scatter plot but presented in a different visual format. Instead of making a new separate visualization to do a different visual style, you can edit and change existing visualizations easily with Power BI.

For the current line chart, select the visual and try selecting different visualizations on the **Visualization panel**. Visualizations with similar structures to your existing visual, like bar charts, will change over seamlessly. A slightly different visualization like a scatter plot might require some testing with the **Fields** in the **Fields** tab.

- Change your line chart to a scatter plot.
- Drag **life_exp** to the y-axis and **Year** to the x-axis

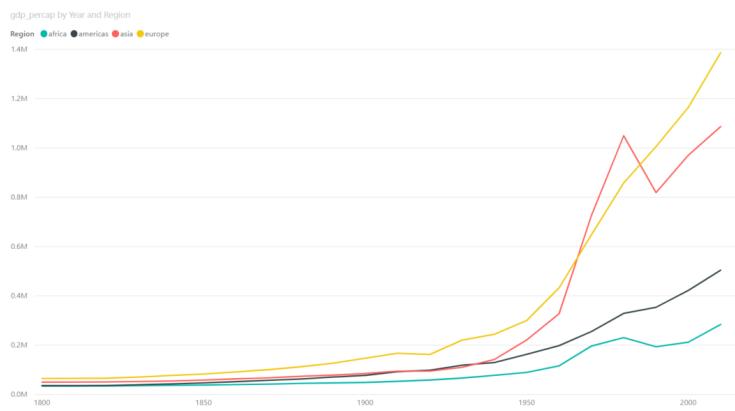
This should now be identical to your first scatter plot.

As you may have noticed, dragging and dropping **Fields** into the **Fields** tab will automatically change the data visualization. You can easily swap or add new fields using the drag and drop to change and discover new ways to visualize your data. You can remove fields by clicking the x next to the name.

Challenge 2: Line chart

As the line chart is showing the same information as an existing visualization, change the chart to show average GDP per capita instead of average life expectancy.

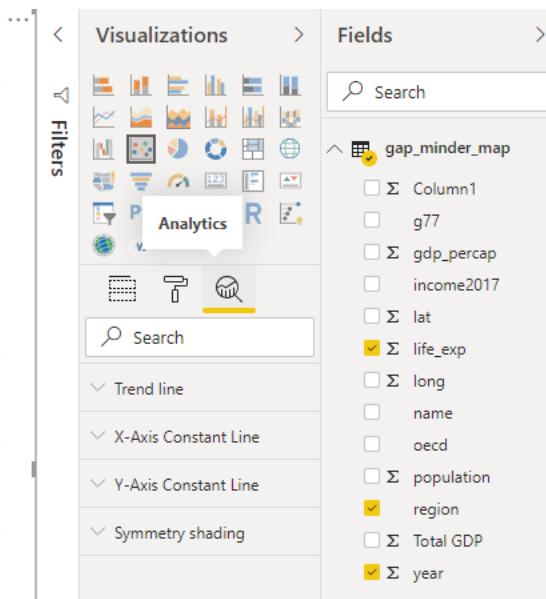
Challenge 2: Solution



3.1.5 Trends and analytics in plots

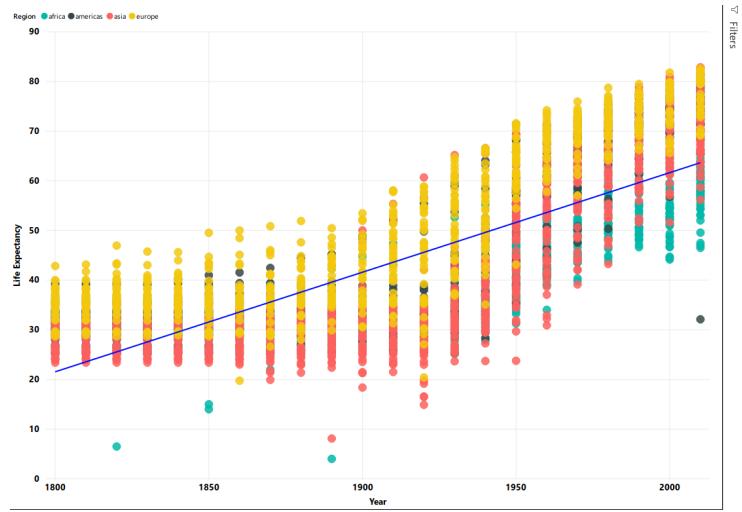
Up till now we have been working in the **Fields** tab of the **Visualizations panel**. There are two other useful tabs, **Format** and **Analytics**. Let's have a look at **Analytics**.

This tab allows you to add different reference lines to your visualization which can help the user determine trends and insights in the data. Click on the scatter plot that you have created. Select the **Analytics** tab.



Here you can add reference lines for various measures. Add a trend line to your chart.

These options will vary depending on the chart that you use.



3.2 Plot modifications

An important aspect of visualizing and telling the story of your data is the design and format of your visualizations. This is where we will use the **Format** tab.

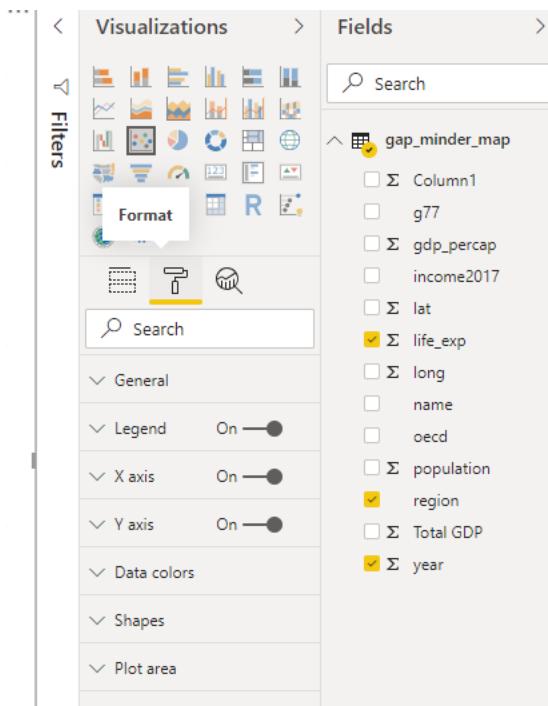
Click on your scatter chart you created for Challenge 2. Click the **Format** tab to see the variety of options available to make your visualization more readable and understandable.

A common issue is the default titles of charts. This will usually use the names of the data columns which is often meaningless to the average user.

- Click on **Title** and change it to a clearer name like ‘Regional average life expectancy since 1800’.

You can also edit the legend or axis labels. Let’s make the axis labels more clear.

- Change the font for the x and y axis to Segoe(Bold), increase the font size to 12 and color to black.



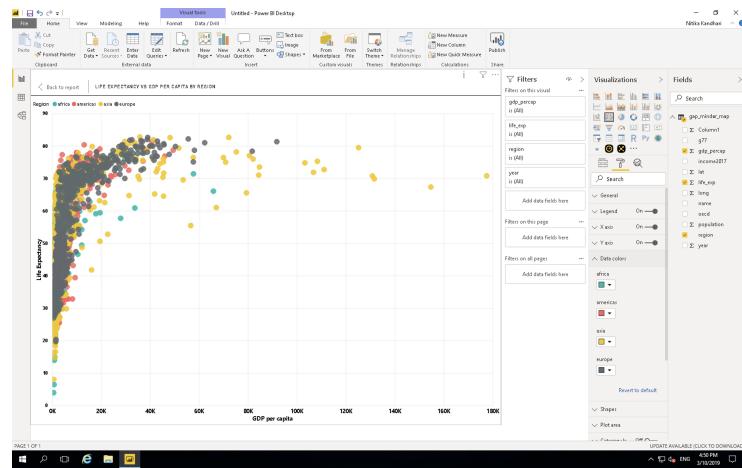
The options available will be different for each visualization. Using these options will greatly increase the engagement and understanding of your visuals.

Challenge 3: Scatter Plot

Let's say you think there might be a correlation between GDP per capita and life expectancy. Try creating a scatter plot showing the comparison between these two values split by region.

Challenge 3: Solution

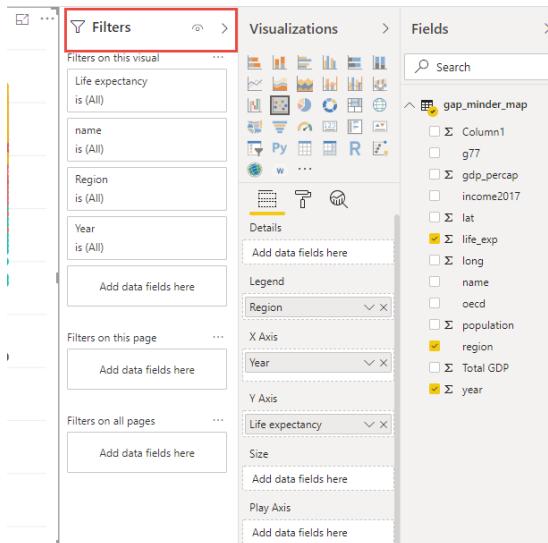
- `gdp_per_cap` as x.
- `life_exp` as y.
- `region` as the legend.



As you can see, this visualization is messy and confusing. In the next section we will show ways to make this visualization clearer.

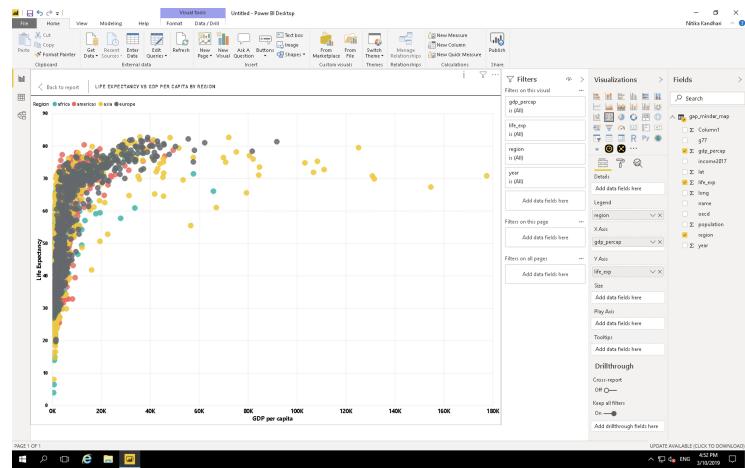
3.3 Filters

Filters are a powerful way to break down and show specific parts of the data. You can access the **Filters** panel through clicking **Filters**.

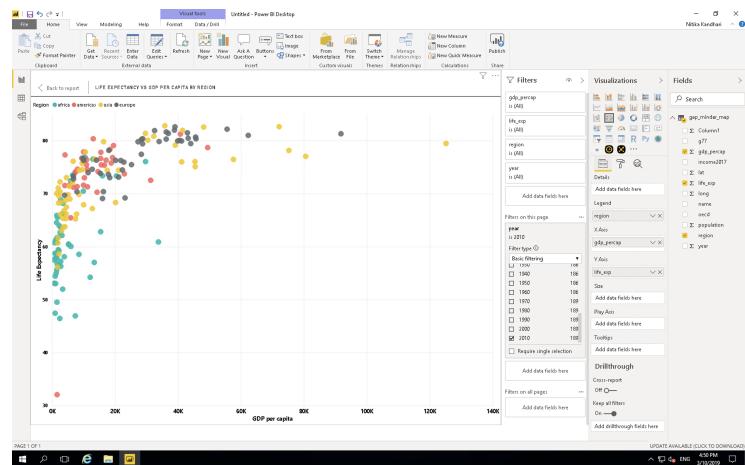


You can filter data for individual visualizations, pages and for the entire report.

Select the scatter plot you created for challenge 3. Click on the **Filter panel** which is adjacent to the **Visualization panel**. Drag the **year** field and place it in “**Filter on this page**” bar.



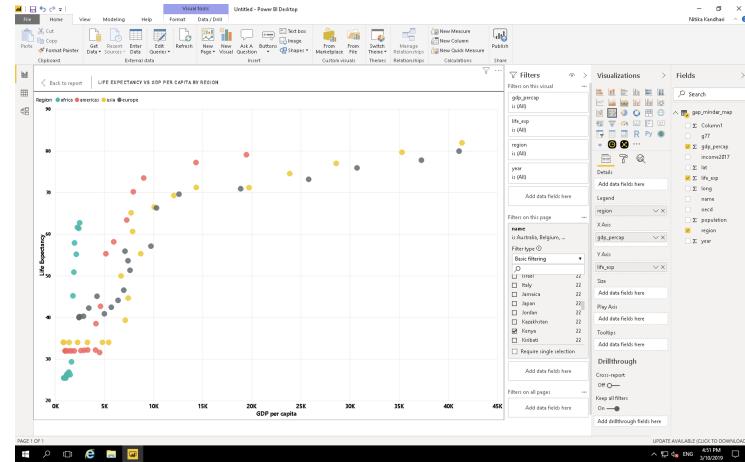
Change the filter type to **Basic Filtering**. Now you have all the years as a scrolling list. Select any one year and you can see the data for that particular year. For example, if we want to look at this data from year 2010, select 2010 in the filter panel.



Challenge 4: Filtering

- A. On the previous plot, create a filter for country names.
- B. Visualize `gdp_per_capita` vs `life_exp` for these countries: Kenya, Australia, Chile and Belgium

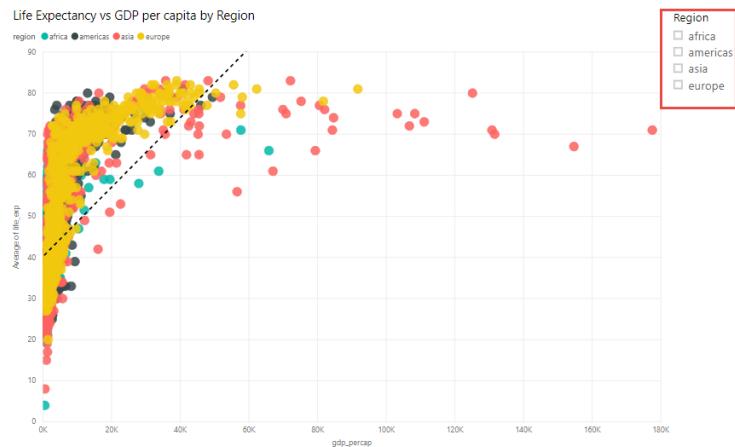
Challenge 4: Solution



3.3.1 Slicer:

In the chart types, locate **Slicer**. Create a new blank Slicer chart. Drag and drop the **region** column in the data field. We have created a slicer and can visualize data for each region separately. Since Power BI is highly interactive, this slicer is applied to all the charts that we have created and will show the results for selection in the slicer. You can chose to apply slicer to specific charts by turning it off for other charts. We will cover this in the next section.

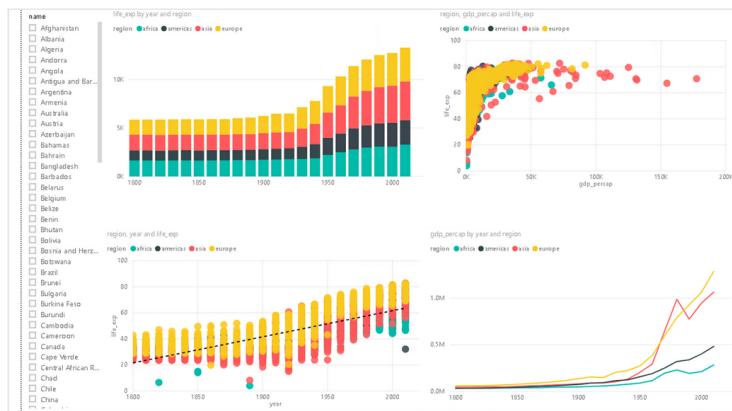
Note: Hold the CTRL button to select more than one option.



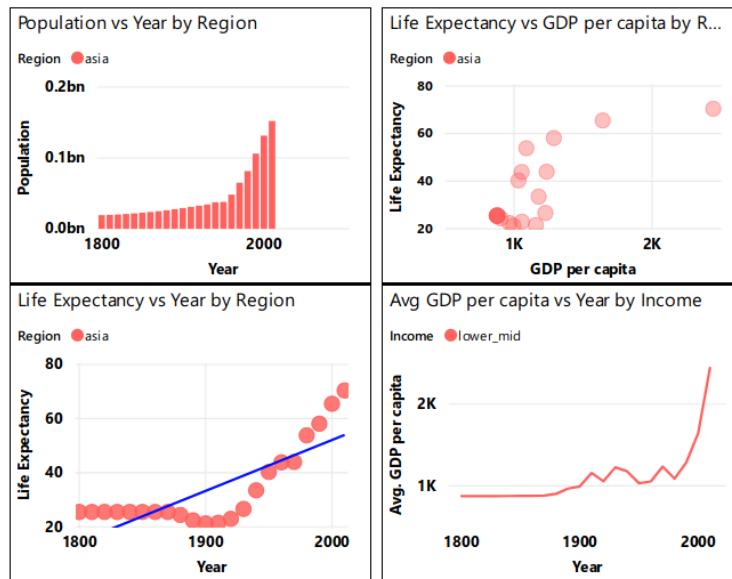
Challenge 5: Slicer

- A. Create a slicer for country names.
- B. First visualize for Bangladesh. Then visualize for Bangladesh and Brazil.

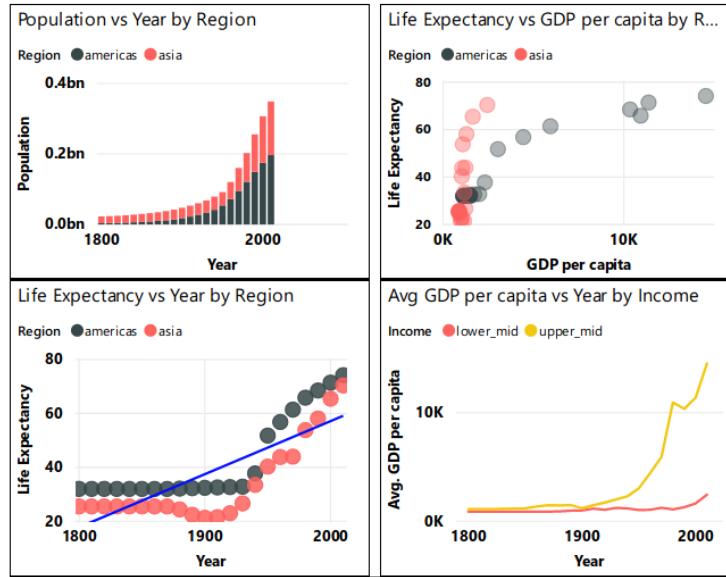
Challenge 5: Solution



For Bangladesh



For Bangladesh and Brazil



3.4 Edit interactions

You may have noticed that clicking on a data point in a visualization will affect other visualizations in the same way as a slicer. Click on a segment in your bar chart to see the effect on other visuals.

While this interaction is useful in exploring the connections between the relationships shown in one visual to another, there will be cases where you do not want a visualization to change depending on the slicer or what you have selected on a visual. You can edit how these interactions affect your visualisations through **Edit interactions** on the **Format** tab.

- Select the **Avg GDP per capita vs Year by Income** line chart.
- Select **Asia** on the chart legend.
- Select the **Format** menu and select **Edit interactions**.

Several icons will pop up near the other visualizations. These control how the visual will look depending on your interaction with the selected visual.

Selecting **None** will mean that the related visual will not change depending on interactions with the selected visual. Change one of the scatter plots to **None** and select a different data point on the line chart to see the effect. Select **Asia** on the line chart again. Currently the bar chart highlights the relevant section. Select the filter icon to change and select another data point on the line chart to see the effect.

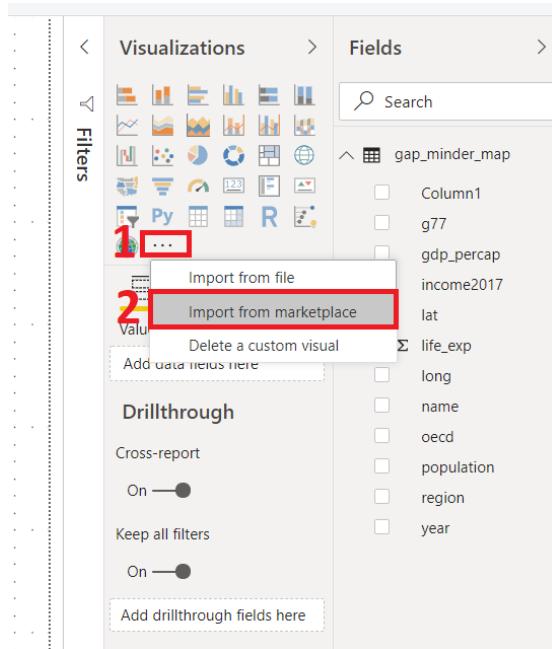
Note: existing elements on the page may interfere with the **Edit interactions** icons. Resize and move your visuals to avoid this.



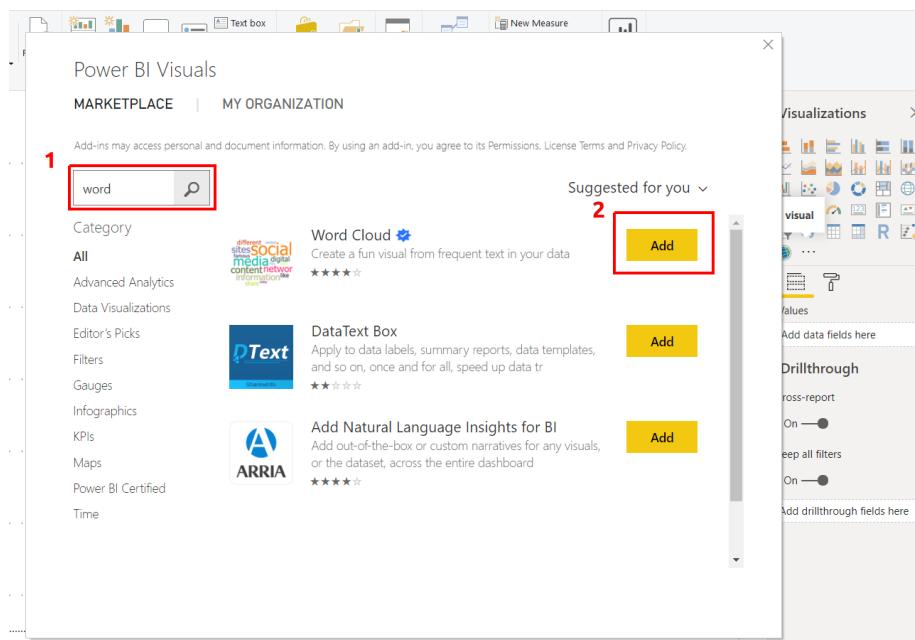
Every visual interacts with all other visuals individually. Check the **Edit interactions** to make sure all your interactions work as expected.

3.5 Explore Marketplace for other visualizations

The visualizations we have been using are part of the default offerings in Power BI. There are more visualisations available in the marketplace. To import a new visualisation template from the marketplace, click on the icon (...), i.e. three horizontal dots in the visualization panel then click on import from the marketplace.



This will pop a new window, where you can search for various types of templates. We are looking for the Word Cloud template. Type Word Cloud in the search box, once you find the template click on the **Add icon**. This will add it to the **Visualization panel**.



Challenge 6: Create a Word Cloud for countries by GDP per capita

- Create a plot that compares GDP per capita for each country
 - Category: name
 - Values: GDP per capita
- Use a slicer with years.
- Filter to 2010.

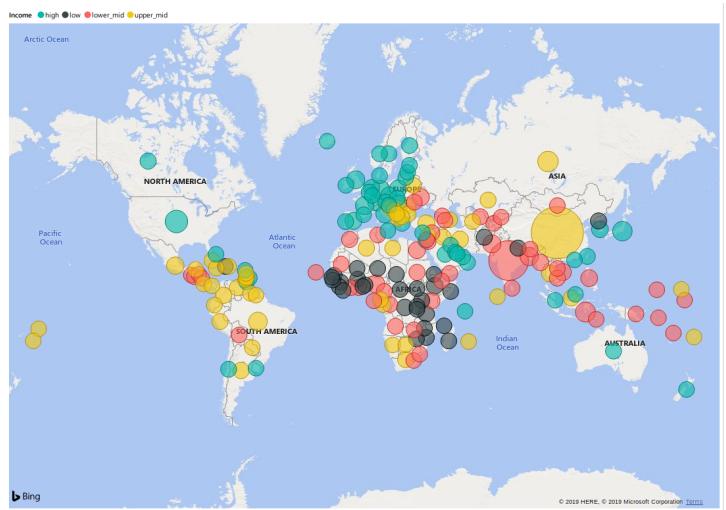
Challenge 6: Solution



3.5.1 Map chart

We need Latitude `lat` and Longitude `long` values to create a Map chart. For this, we use the following parameters:

`Longitude: long`
`Latitude: lat`
`Size: Population`
`Colour: Income level`



This plot tells us a country's income level in 2017 - high income, upper-middle income, lower-middle income or low income by the color of the bubbles. These categories can be seen in the legend at the top of the chart. It also indicates the population size of each country by the size of bubble.

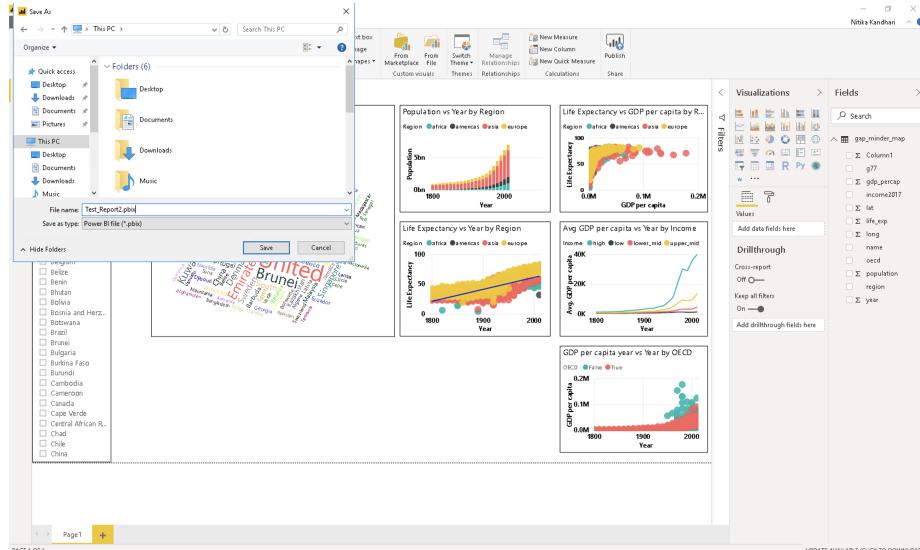
Chapter 4

Saving and Exporting

Now that we have visualised the data and created various types of plots we need to save our visuals.

4.1 Saving as pbix files

Go to **File > Save**, then choose an appropriate file name and the folder to save it. Click on **Save**.



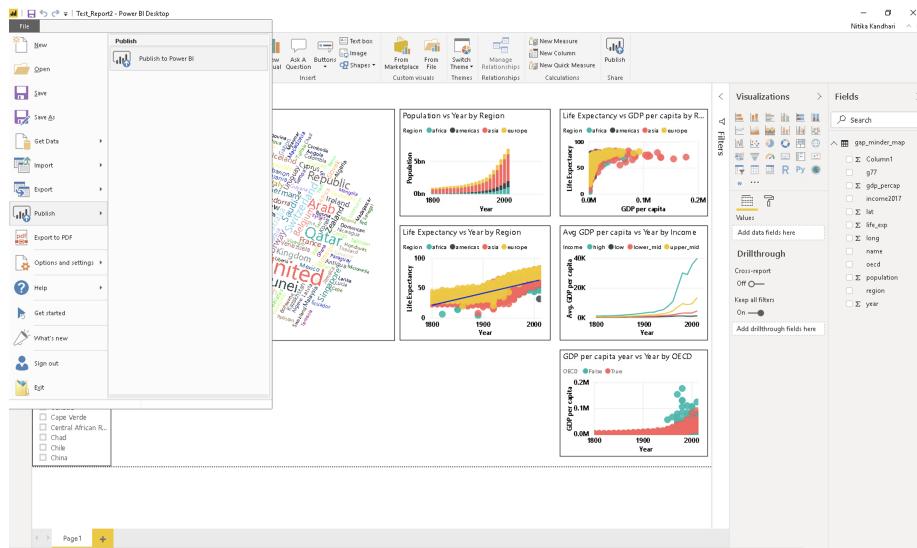
The file extension for Power BI files is “.pbix”. The .pbix files are highly compressed file types that contains all the graphics along with the actual data.

Note: If you share your .pbix file with others, your actual data gets shared as well.

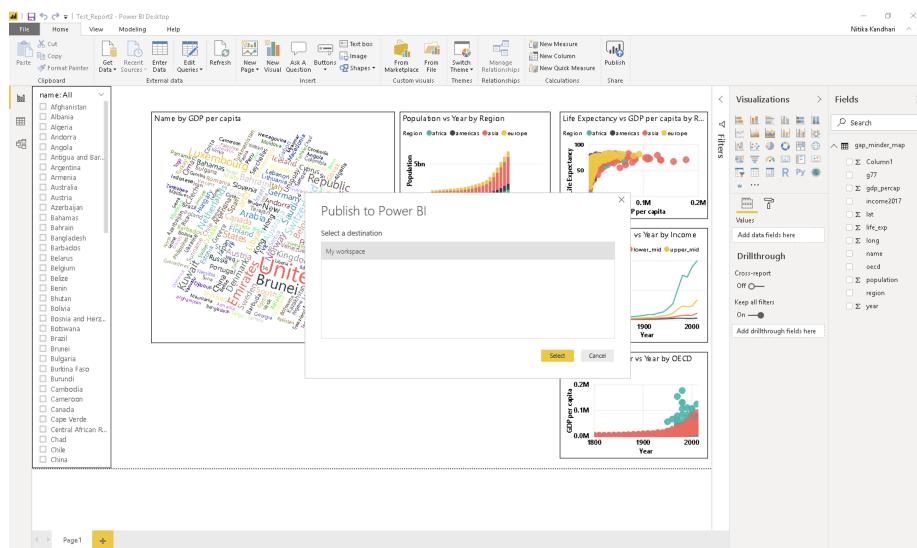
4.2 Exporting and publishing report

Now we want to create a report of our analysis and share it with others. We use Power BI to publish the report on the Power BI server.

To do this, go to **File > Publish > Publish to Power BI**.

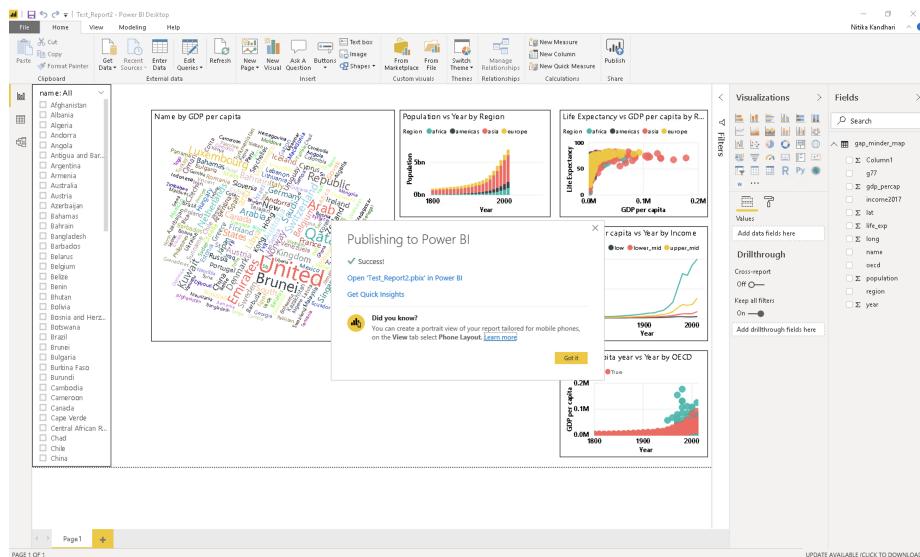


After clicking on **Publish to Power BI**, you will be prompted to select a destination on the Power BI server where you want to publish your report. The default setting is **My workspace**. You can create different workspaces dedicated to different projects on the server. Let's use the default option, and click **Select**.

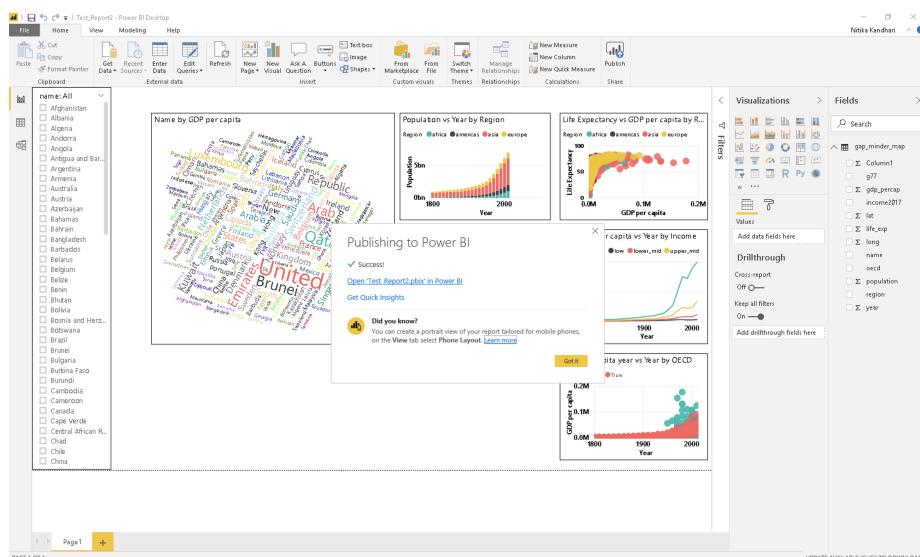


It takes about 2-3 mins to finalise the report and you will see the following success message on your screen.

CHAPTER 4. SAVING AND EXPORTING

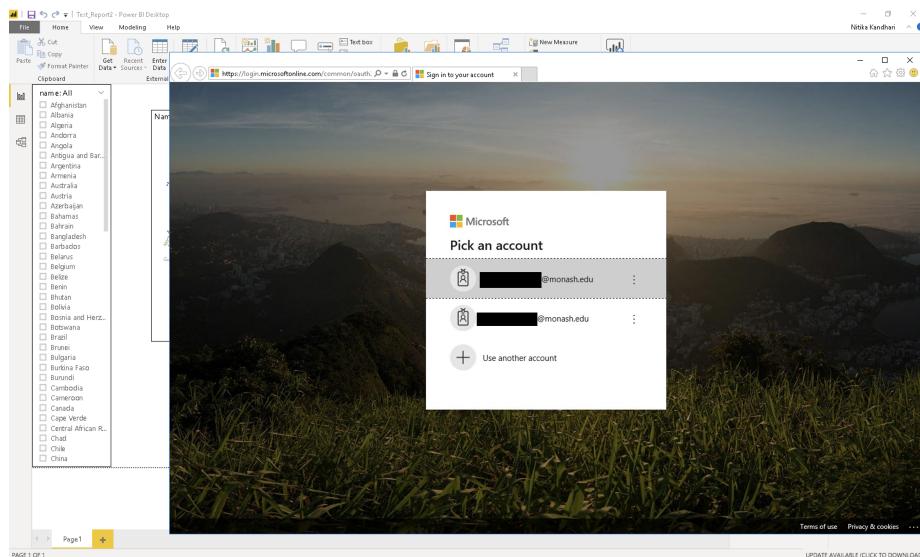


Congratulations! The report has been published to your workspace on PowerBI. To access it, click on **Open <YOUR_FILENAME.pbix>** in Power BI.

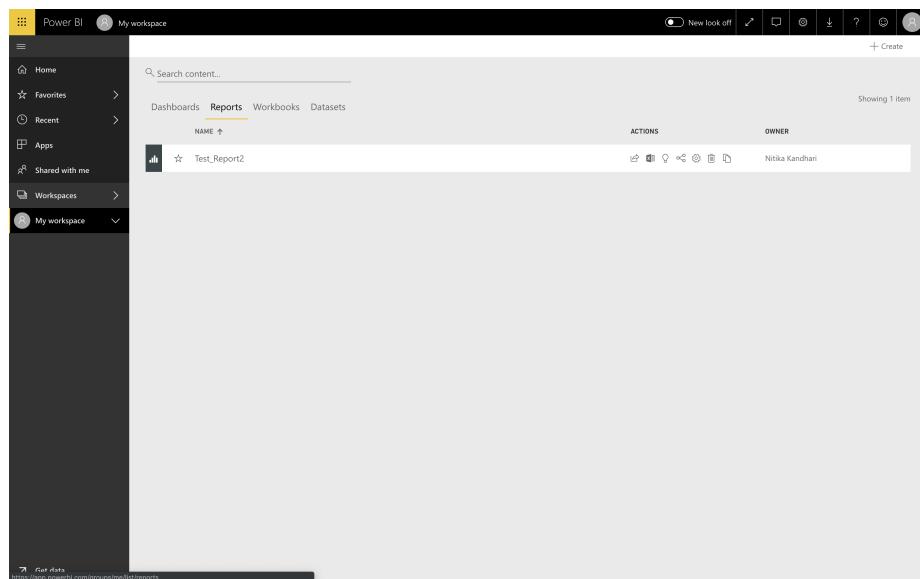


After you click on the link, you will be taken to Power BI's login through Microsoft. You need to fill in your login credentials.

CHAPTER 4. SAVING AND EXPORTING

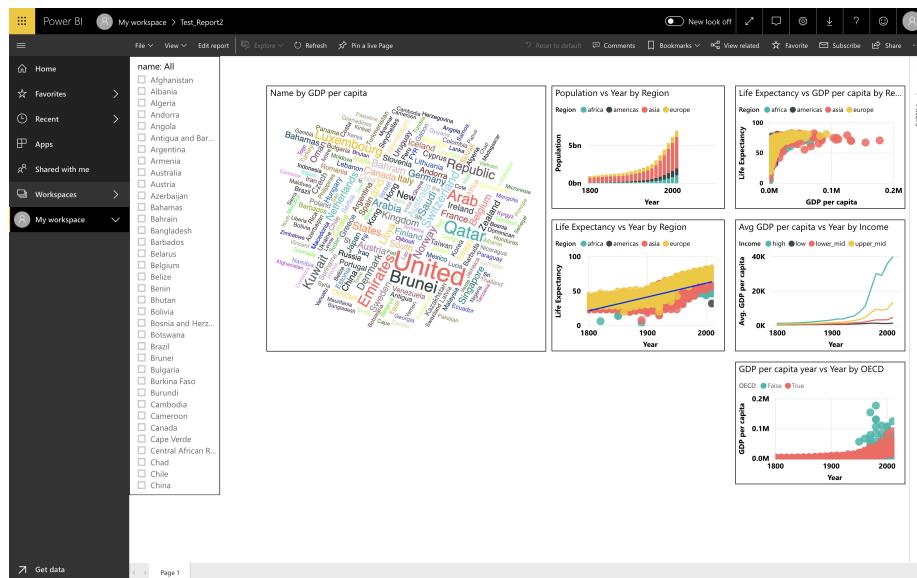


Once you sign in, you will see the Power BI dashboard. Scroll through the tabs on the top - Dashboards, Reports, Workbooks and Datasets. We are interested in the **Reports** tab because that is where you can find your published report. The different types of actions can be seen under the **Actions** tab. These actions include - share, analyze in Excel, quick insights etc. Hover over the different symbols to find out what they do and select the appropriate action.

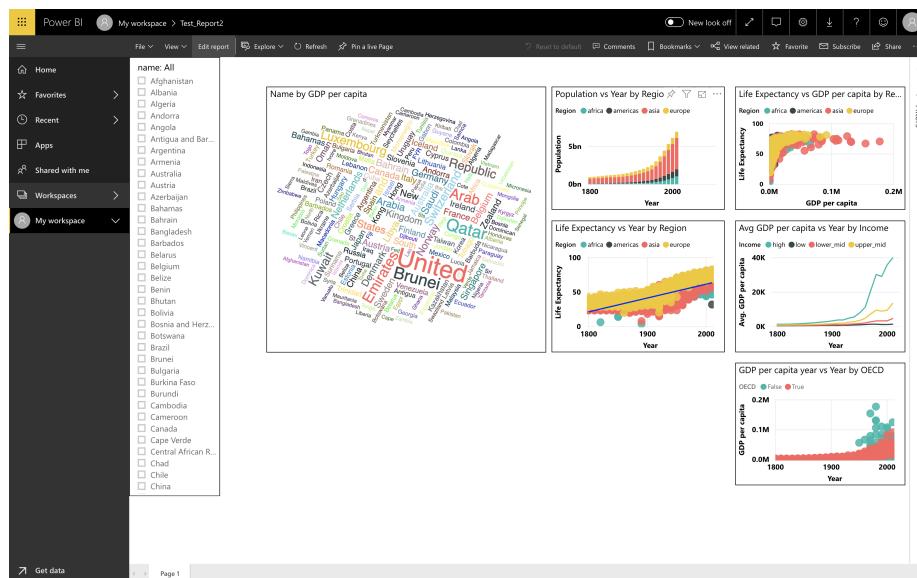


We want to take a look at our report and share it with others. Let's click on the report itself. You will see a similar screen showing your report:

CHAPTER 4. SAVING AND EXPORTING

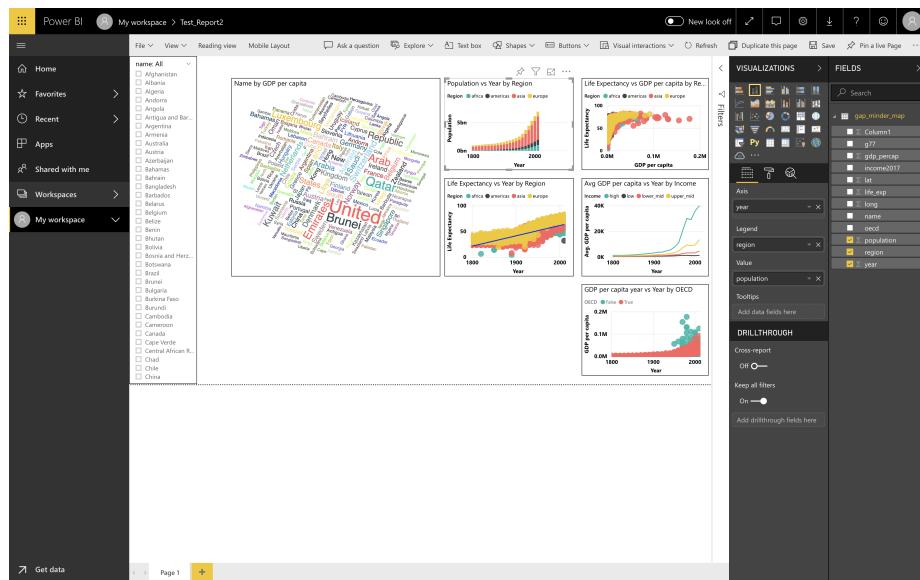


If you click on **Edit** on the top, you will be able to edit mode and perform nearly everything you can in the Power BI desktop.



You can see all the Visualization options and fields in the Power BI server. Click on the **Share** button in the top left corner. This allows you to share your report with others.

CHAPTER 4. SAVING AND EXPORTING



Chapter 5

Next steps

5.1 Deepen your understanding

Microsoft has in-depth guides and tutorials on their Power BI Guided Learning¹ website.

You can visit the Microsoft Power BI Blog² for the latest updates on performance improvements, more visualization options and so on. There is a community of forums and blogs for you to discuss with others.

5.2 Join the community

Join the Data Fluency community at Monash³.

- Mailing list for workshop and event announcements.
- Slack for discussion.
- Monthly seminars on Data Science topics.
- Drop-in sessions on Friday afternoon.

The Carpentries⁴ run intensive two day workshops on scientific computing and data science topics worldwide. The style of this present workshop is very much based on theirs.

¹https://docs.microsoft.com/en-us/power-bi/guided-learning/?WT.mc_id=PBIService_GettingStarted

²<https://powerbi.microsoft.com/en-us/blog/>

³<https://www.monash.edu/data-fluency>

⁴<https://carpentries.org/>