

Module 1: Introduction to Self-Service BI Solutions

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Lesson 2: Introduction to Data Analysis

Demo 1: Importing Data with Power BI Desktop

1. Ensure that you have copied all folders from `Desktop/power-bi-quickstart` folder into `*D:*` drive before starting the lab.
2. In the `D:\Demofiles\Mod01` folder, run **Setup.cmd** as **Administrator**.
3. In the **User Account Control** dialog box, click **Yes**.
4. If prompted to continue this operation, type **Y**, and then press Enter.
5. When the script completes, press any key to close the window.
6. On the desktop, double-click **Power BI Desktop**.
7. To close the getting started window, at the top-right of the window, click **X**.
8. On the **Power BI Desktop** screen, click **Get data**.
9. In the **Get Data** dialog box, click **SQL Server database**, and then click **Connect**.
10. In the **SQL Server database** dialog box, in the **Server** box, type **localhost**.
11. In the **Database (optional)** box, type **AdventureWorksDW**, and then click **OK**.
12. In the **SQL Server database** dialog box, leave the default settings unchanged, and then click **Connect**.
13. In the **Encryption Support** dialog box, click **OK**.
14. In the **Navigator** dialog box, select the **FactInternetSales** check box.
15. Click **Select Related Tables**, and then click **Transform Data**.
16. If the **Connection Settings** dialog box appears, leave **Import** selected, and then click **OK**.
17. In the **Untitled - Power Query Editor** window, in the **Queries** pane, click **FactInternetSales**.
18. Right-click the **CarrierTrackingNumber** column, and click **Remove**.
19. Right-click the **CustomerPONumber** column, and click **Remove**.
20. In the **Queries** pane, click **DimCustomer**.
21. Right-click the **Title** column, and click **Remove**.
22. Right-click the **NameStyle** column, and click **Remove**.
23. Right-click the **Suffix** column, and click **Remove**.

24. Right-click the **MaritalStatus** column, and click **Replace Values**.
 25. In the **Replace Values** dialog box, in the **Value To Find** box, type **M**.
 26. In the **Replace With** box, type **Married**, and then click **OK**.
 27. Right-click the **MaritalStatus** column, and click **Replace Values**.
 28. In the **Replace Values** dialog box, in the **Value To Find** box, type **S**.
 29. In the **Replace With** box, type **Single**, and then click **OK**.
 30. Right-click the **Gender** column, and click **Replace Values**.
 31. In the **Replace Values** dialog box, in the **Value To Find** box, type **F**.
 32. In the **Replace With** box, type **Female**, and then click **OK**.
 33. Right-click the **Gender** column, and click **Replace Values**.
 34. In the **Replace Values** dialog box, in the **Value To Find** box, type **M**.
 35. In the **Replace With** box, type **Male**, and then click **OK**.
 36. On the **Home** menu, click **Close & Apply**.
 37. Wait until the data has successfully loaded.
 38. In the **FIELDS** pane, expand **FactInternetSales**, and then click **SalesAmount**.
 39. On the **Modeling** tab, in the **Formatting** group, click **Format: Currency general**, point to **Currency**, and then click **\$ English (United States)**.
 40. In the **FIELDS** pane, right-click **DimCustomer**, and then click **New column**.
 41. In the formula bar, type **FullName = DimCustomer[FirstName] & " " & DimCustomer[LastName]**, and then press Enter.
 42. On the **File** menu, click **Save**. Name the file **Adventure Works Sales**, and save the file to **D:\Demofiles\Mod01**.
 43. Leave Power BI Desktop open for the next demonstration.
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Lesson 3: Introduction to Data Visualization

Demo 1: Visualizing Data with Power BI Desktop

1. In Power BI Desktop, in the **FIELDS** pane, under **DimCustomer**, select **Gender**, and **MaritalStatus**.
2. Under **FactInternetSales**, select **SalesAmount**.
3. In the **VISUALIZATIONS** pane, click **Clustered column chart**.
4. Click **Format**, expand **Title**, and then change the **Title text** to **Sales by Gender and Marital Status**.
5. Change **Alignment** to **Center**.
6. In the **FIELDS** pane, expand **DimProduct**, and drag the **Color** field onto the report canvas to create a new table.

7. Under **FactInternetSales**, drag the **OrderQuantity** field onto the new table.
8. In the **VISUALIZATIONS** pane, click **Donut chart**.
9. Click **Format**, and then expand **Title**.
10. Change the **Title text** to **Orders by Color**.
11. Change **Alignment** to **Center**.
12. In the **FIELDS** pane, under **FactInternetSales**, drag the **SalesAmount** field onto the report canvas to create a new column chart.
13. In the **VISUALIZATIONS** pane, click **Fields**.
14. In the **FIELDS** pane, expand **DimDate**, and drag the **EnglishMonthName** to the **Axis** property.
15. Grab the resizer on the column chart to widen the chart so that the month names display clearly.
16. In the **VISUALIZATIONS** pane, click **Format**, and then expand **Title**.
17. Change the **Title text** to **Sales by Month**.
18. Change **Alignment** to **Center**.
19. On the **File** menu, click **Save**.