

Module 1: Introduction to Self-Service BI Solutions

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Note: Lab Solution is present in Desktop\power-bi-quickstart\Labfiles\Lab01\Solution folder:

Lab: Exploring an Enterprise BI Solution

Exercise 1: Lab Environment Setup

Lab environment is already setup.

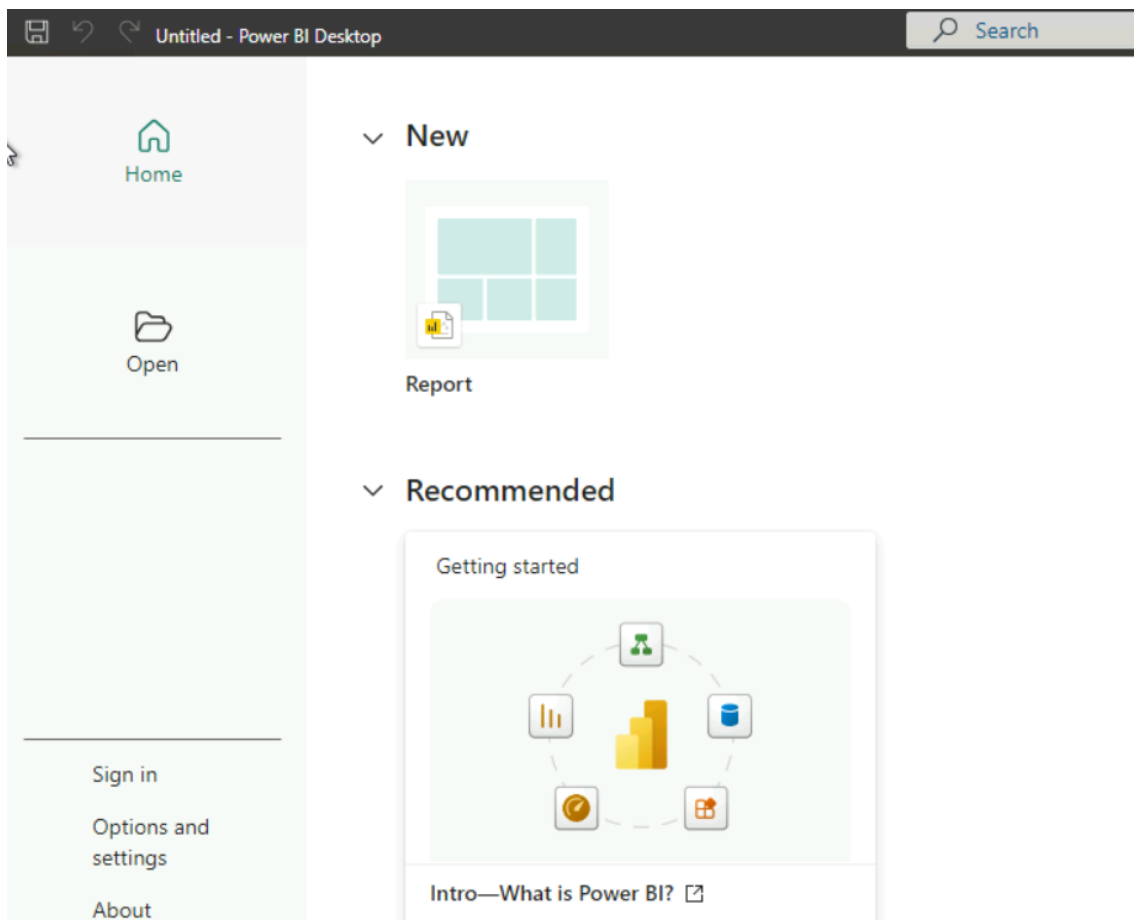
Exercise 2: Creating a Power BI Report

Task 1: Import Data into Power BI Desktop

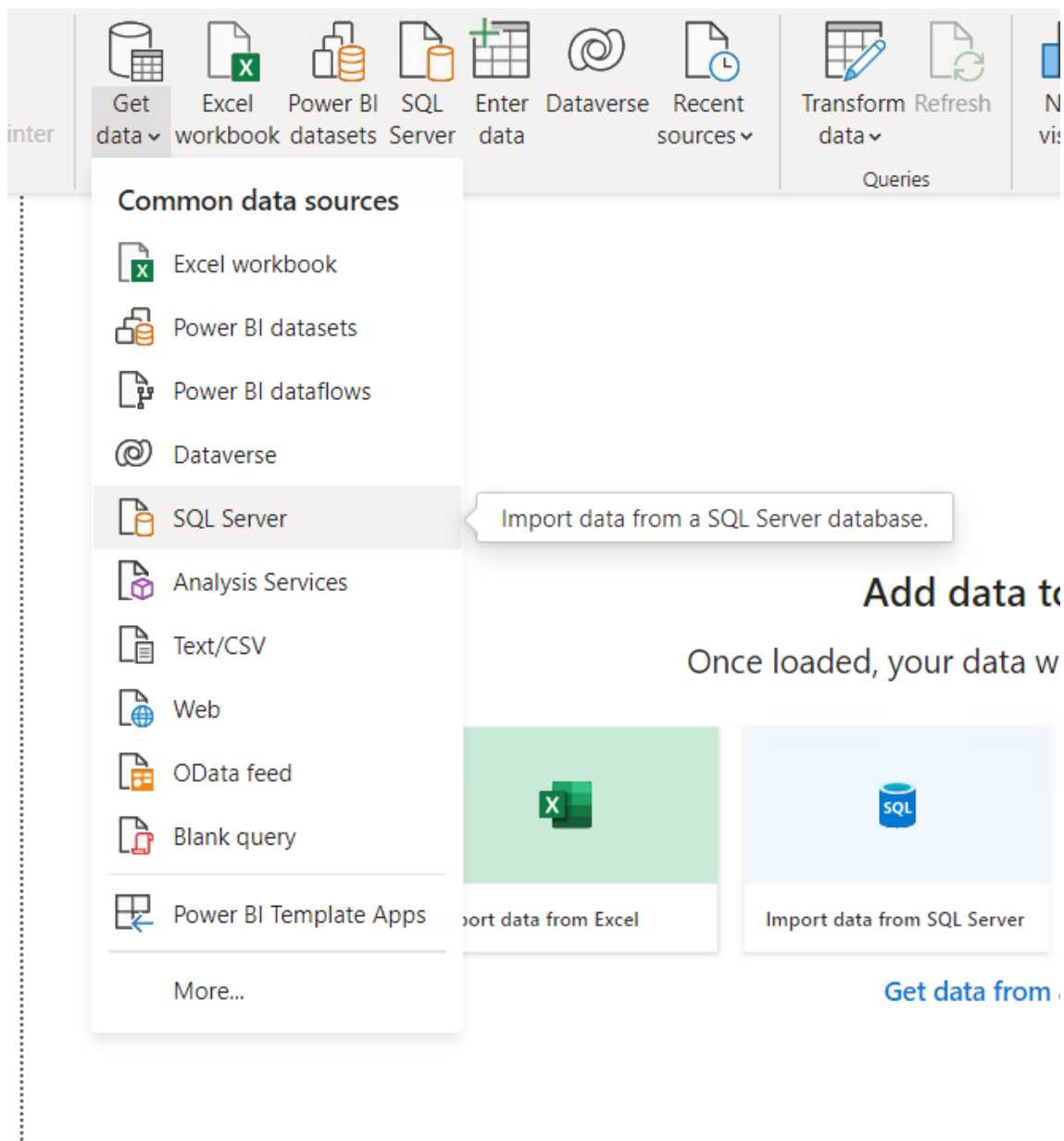
1. Make sure previous task was completed.
2. On the Taskbar, click **Power BI Desktop**.



3. Click **New > Report**:



4. On the **Power BI Desktop** screen appears, click **Get data**.



5. In the **Get Data** dialog box, click **SQL Server**, and then click **Connect**.
6. In the **SQL Server database** dialog box, in the **Server** box, type **localhost**.
7. In the **Database (optional)** box, type **AdventureWorksDW**, and then click **OK**.

SQL Server database

Server ⓘ

localhost

Database (optional)

AdventureWorksDW

Data Connectivity mode ⓘ

☒ Import
 ☐ DirectQuery

> Advanced options

OK

Cancel

8. If the **SQL Server database** dialog box appears, leave the default settings unchanged, and then click **Connect**.

Windows

Database

Microsoft account

SQL Server database

localhost;AdventureWorksDW

Use your Windows credentials to access this database.

☒ Use my current credentials
 ☐ Use alternate credentials

User name

Password

Select which level to apply these settings to

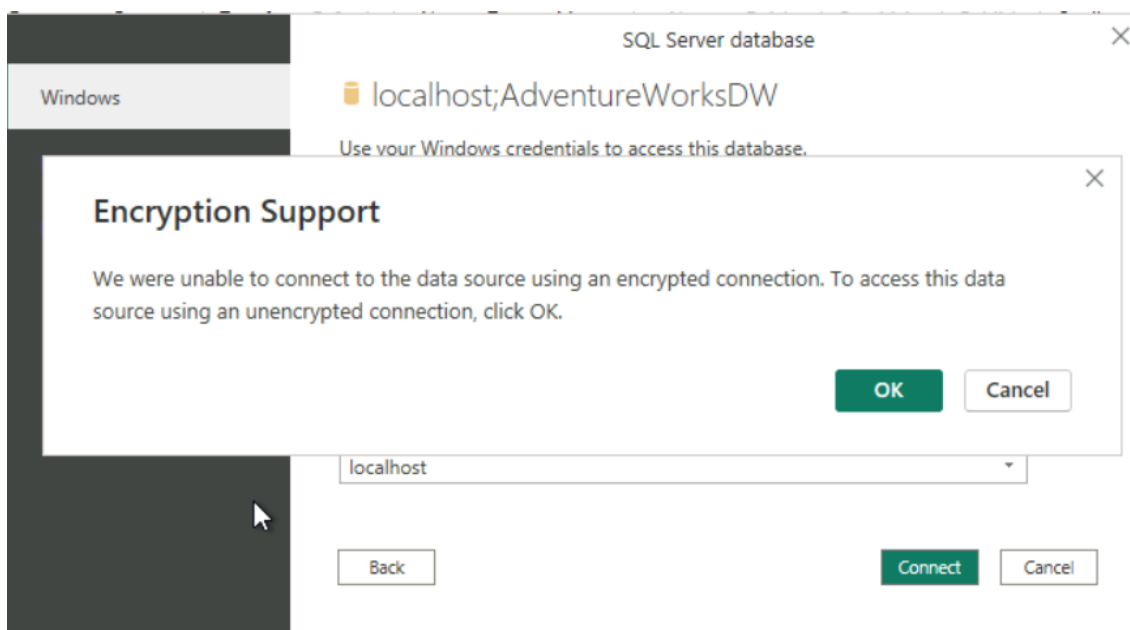
localhost

Back

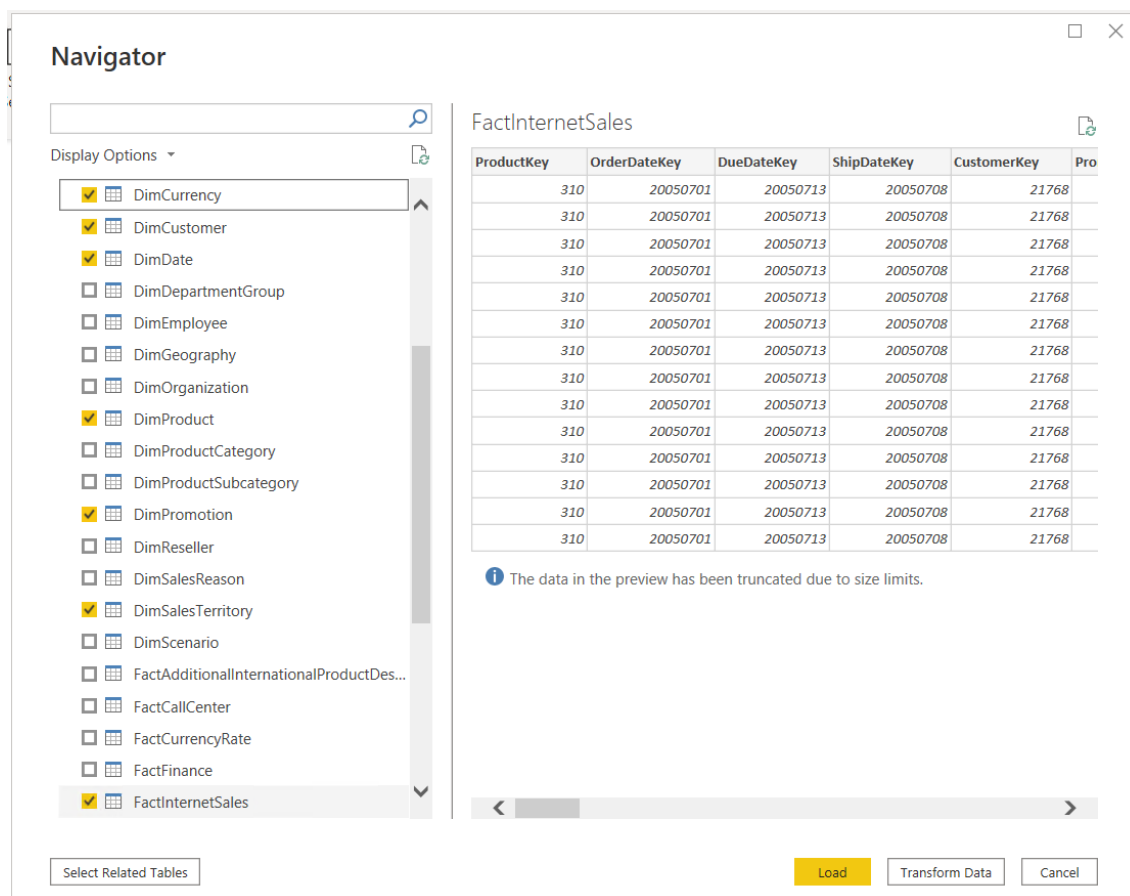
Connect

Cancel

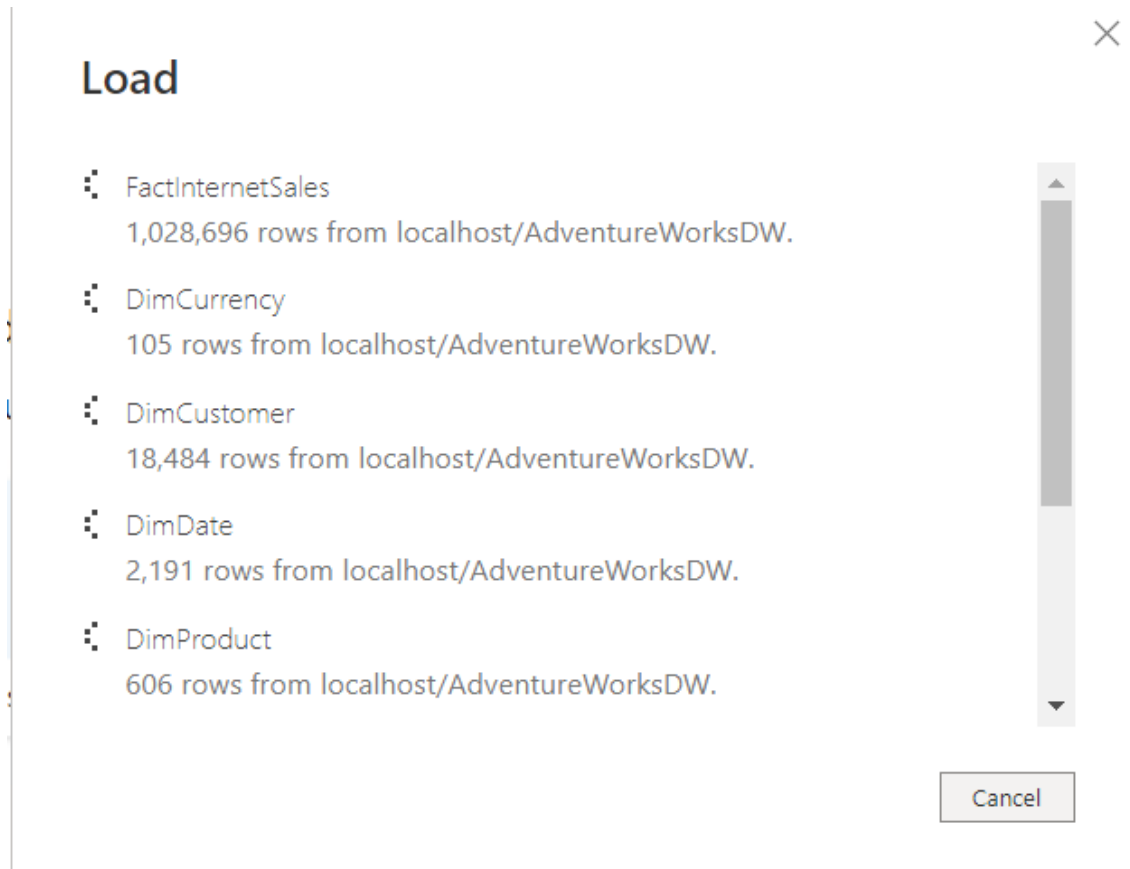
9. If the **Encryption Support** dialog box appears, click **OK**.



10. In the **Navigator** dialog box, select the **FactInternetSales** check box.
11. Click **Select Related Tables**, and then click **Load**.



Note: Wait for some time while tables are loaded.

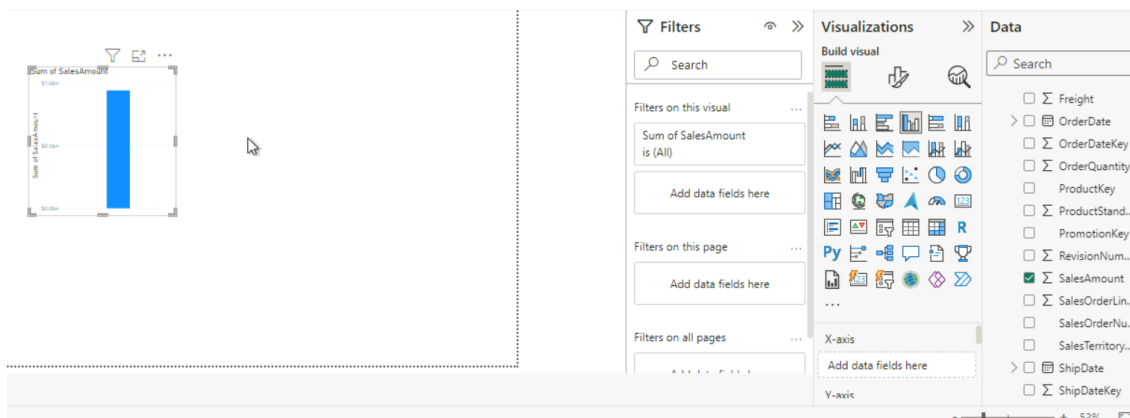


12. On the **File** menu, click **Save**.

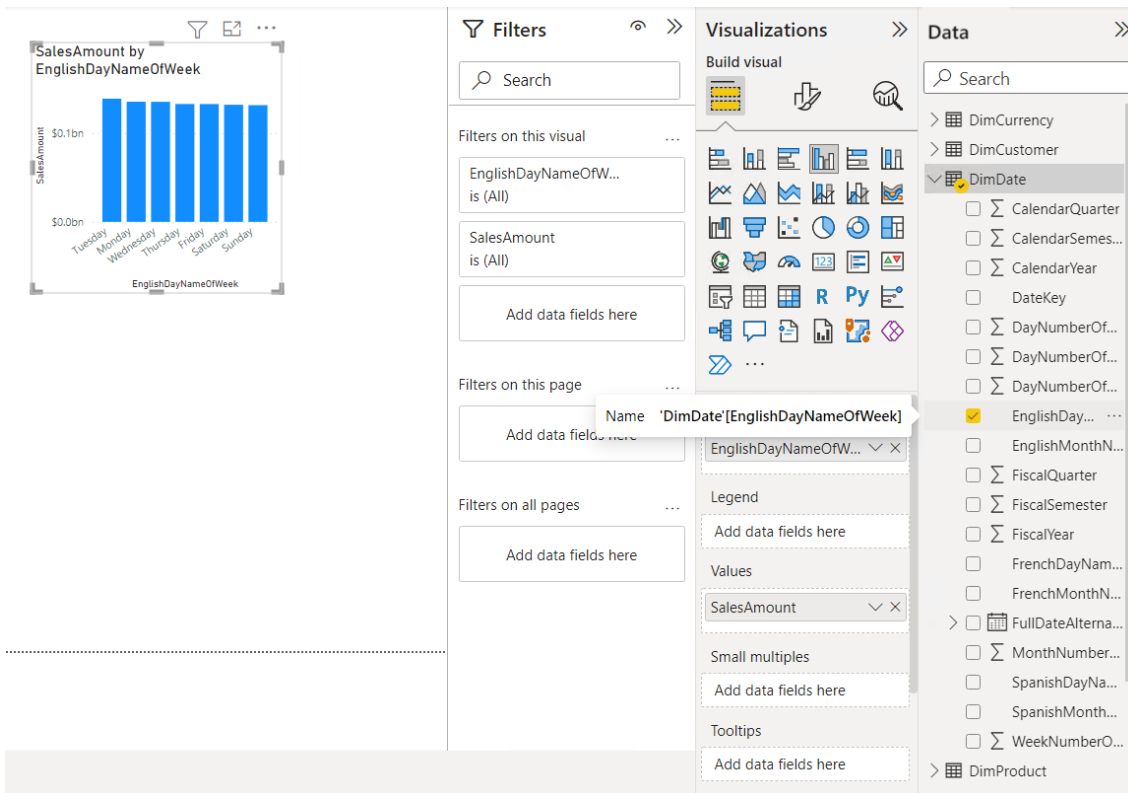
13. In the **Save As** dialog box, browse to the **Desktop\power-bi-quickstart\Labfiles\Lab01\Starter\Project** folder, and in the **File name** box, type **Adventure Works Sales 1**, and then click **Save**.

Task 2: Add Visualizations to the Report

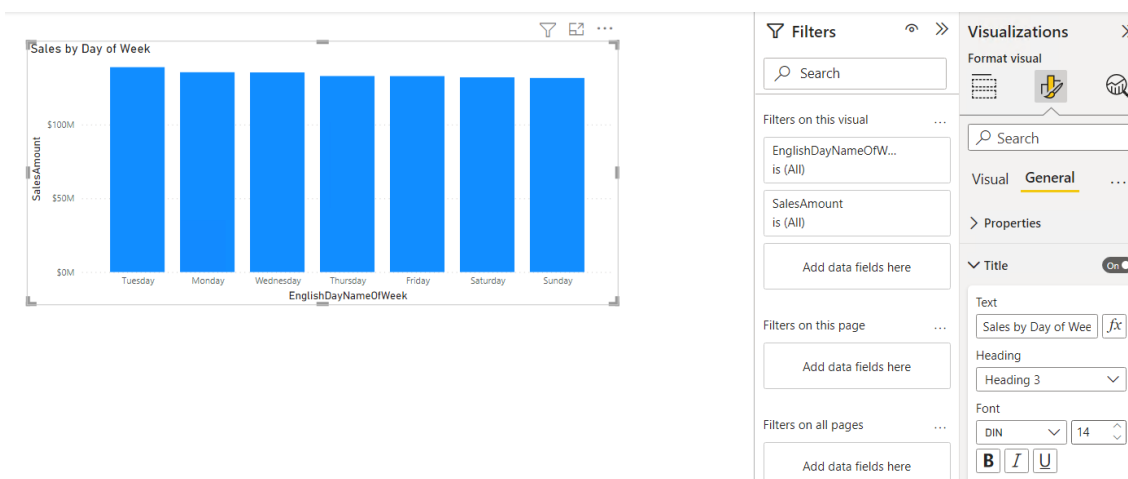
1. In the **Data** pane, expand **FactInternetSales**, and drag the **SalesAmount** field onto the report canvas to create a column chart.



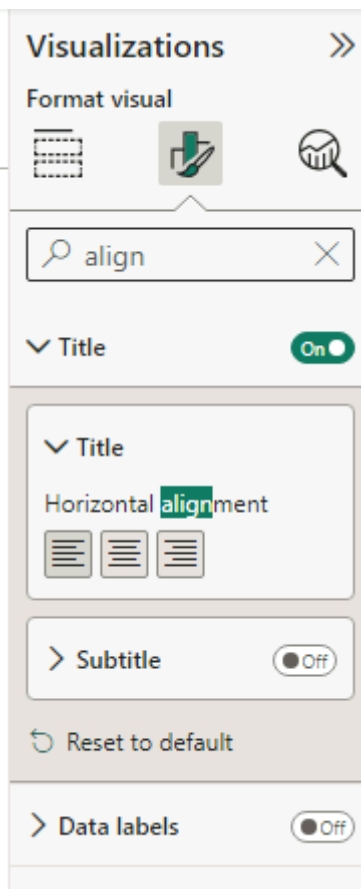
- Expand **DimDate**, and drag the **EnglishDayNameOfWeek** field to the **X-axis** property.



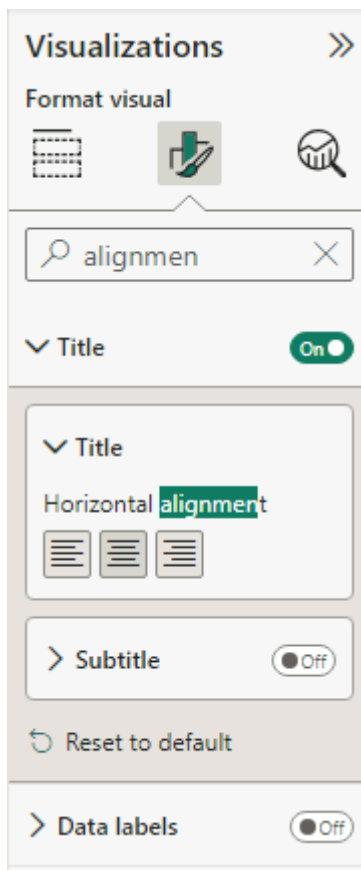
- Move the chart to the top left-hand corner of the canvas, and expand the chart width so the days of the week display in full.
- In the **VISUALIZATIONS** pane, click **Format**, and expand **Title**.
- In the **Title text** box, type **Sales by Day of Week**.



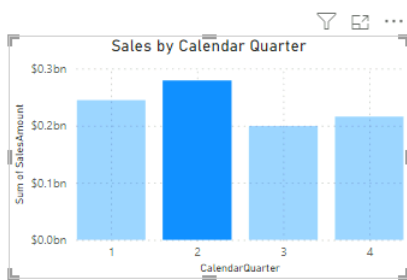
- Next to **Alignment**, click the **Center** icon.



7. In the **Data** pane, under **FactInternetSales**, drag the **SalesAmount** field onto the report canvas to create a column chart.
8. Under **DimDate**, drag the **CalendarQuarter** field onto the chart. Notice that there is only one column.
9. In the **VISUALIZATIONS** pane, click **Data**. Drag the **CalendarQuarter** field from **Y-axis** to **X-axis**.
10. Click **Format**, and expand **Title**.
11. In the **Title text** box, type **Sales by Calendar Quarter**.
12. Next to **Alignment**, click the **Center** icon.



13. Go to **Columns** > **Color** in the **Format** tab and apply conditional formatting by changing default color for lowest value and click **OK** :



Filters

Search

Filters on this visual

CalendarQuarter is (All)

Sum of SalesAmount is (All)

Add data fields here

Filters on this page

Add data fields here

Filters on all pages

Add data fields here

Visualizations

Format visual

Search

Visual General

Apply settings to

Categories

All

Conditional formatting

Make this property change under different conditions that you define.

Color

Blue

▼

Hand icon

Transparency

0 %

↕

○

> Border

Off

> Layout

Reset to default

> Data labels

Off

Data

Color - Categories

Format style

Gradient ▼

What field should we base this on?

Sum of CalendarQuarter ▼

Summarization

Sum ▼

How should we format empty values?

As zero ▼

Minimum

Lowest value ▼ Red ▼

Enter a value

Maximum

Highest value ▼ Blue ▼

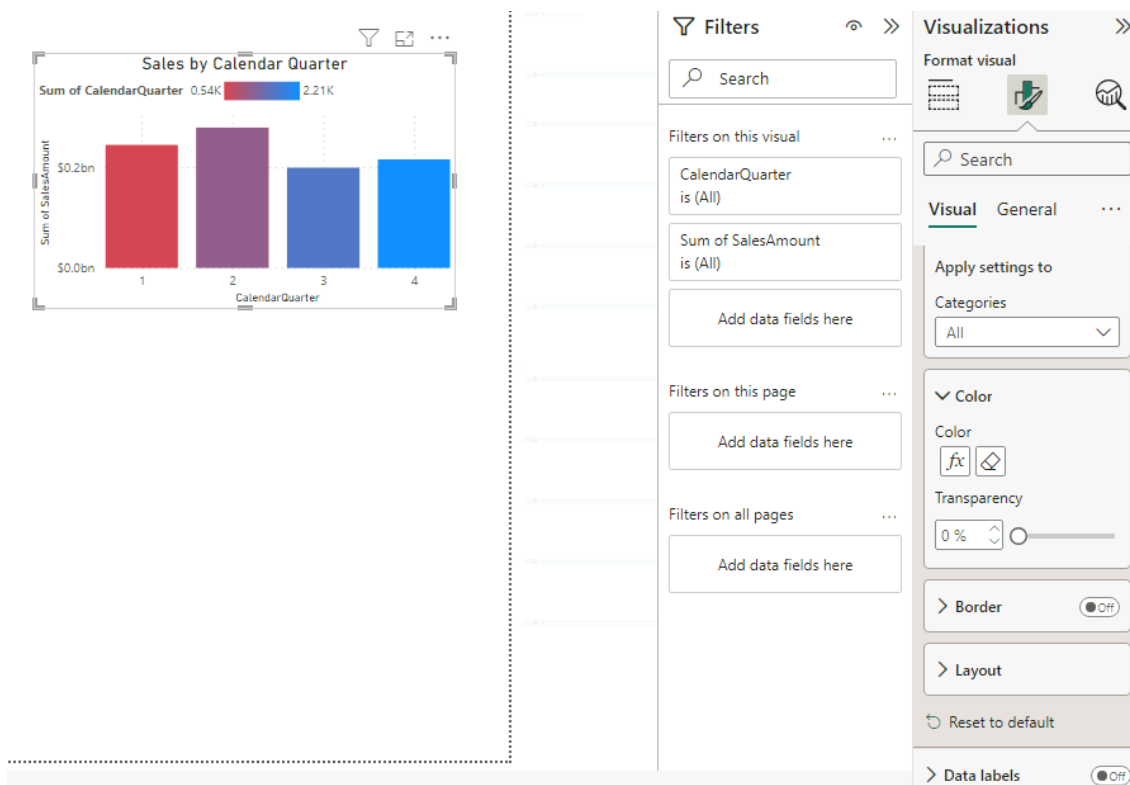
Enter a value

☐ Add a middle color

[Learn more about conditional formatting](#)

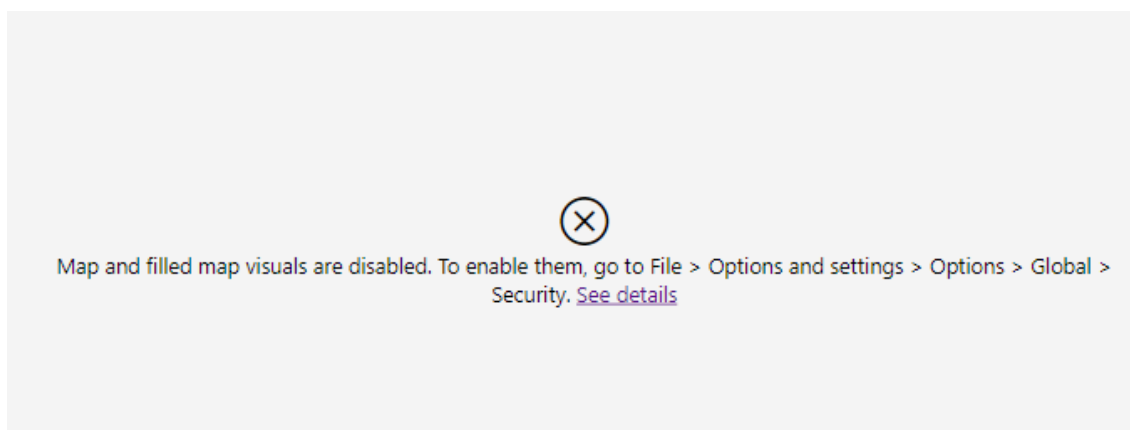
OK

Cancel



14. Move the chart to the right of the **Sales by Day of Week** chart, and expand the chart as well so both charts are the same height.
15. In the **Data** pane, expand **DimSalesTerritory**, and drag the **SalesTerritoryCountry** column onto the report canvas under the **Sales by Day of Week** chart.

Note: Map and filled map visuals option are disabled by default. You will need to enable it first.



Options

GLOBAL

Data Load

Power Query Editor

DirectQuery

R scripting

Python scripting

Security

Privacy

Regional Settings

Updates

Usage Data

Diagnostics

Preview features

Save and Recover

Report settings

Copilot (preview)

Moderate

Data Extensions

☒ (Recommended) Only allow Microsoft certified and other trusted third-party extensions to load
 ☐ (Not Recommended) Allow any extension to load without validation or warning

[Learn more about data extensions](#)

Custom visuals

☒ Show security warning when adding a custom visual to a report

ArcGIS for Power BI

☐ Use ArcGIS for Power BI

Map and Filled Map visuals

☒ Use Map and Filled Map visuals

Authentication Browser

If the authentication window for Power BI (or a data connector) can't open for some reason, we can use your default web browser to authenticate instead.

[Learn more about the authentication browser](#)

☐ Use my default web browser

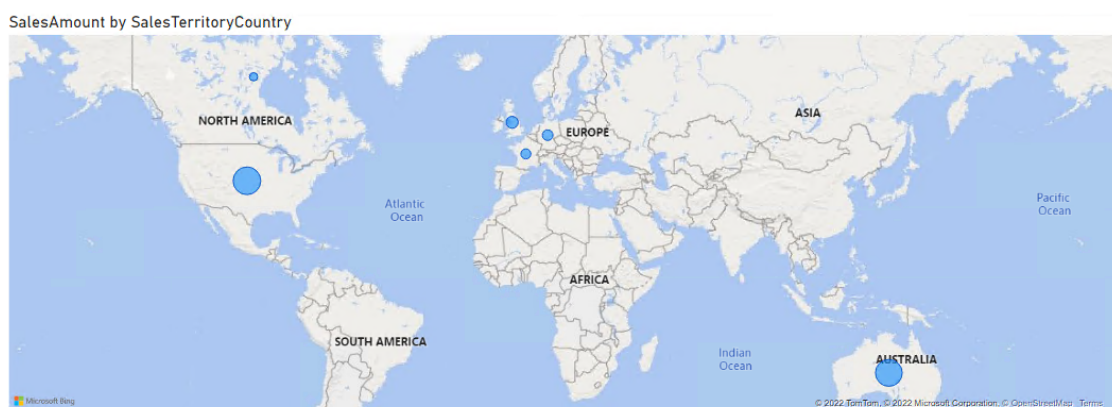
Approved ADFS Authentication Services ⓘ

i You have not approved any authentication services on this computer.

OKCancel

16. Under **FactInternetSales**, drag the **SalesAmount** field onto the map.

17. Expand the map to show all the values.



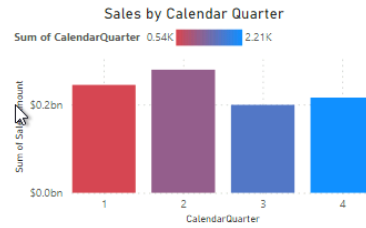
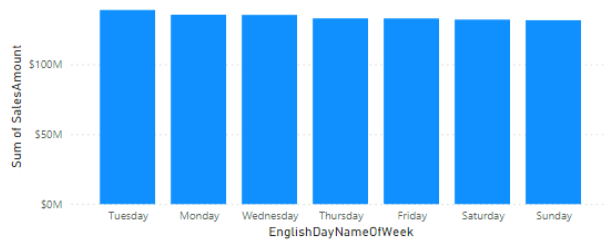
18. In the **Title text** box, type **Sales by Country**.

19. Next to **Alignment**, click the **Center** icon.

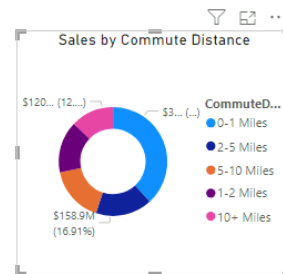
20. In the **Data** pane, expand **DimCustomer**, and drag the **CommuteDistance** field onto the report canvas under the **Sales by Calendar Quarter** chart.

21. Under **FactInternetSales**, drag the **SalesAmount** field onto the chart.
22. In the **VISUALIZATIONS** pane, click **Donut chart**.
23. In the **Title text** box, type **Sales by Commute Distance**.
24. Next to **Alignment**, click the **Center** icon.

Sales by Day of Week



Sales by Country



25. On the **File** menu, click **Save**.