Module 1: Introduction to Self-Service BI Solutions

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

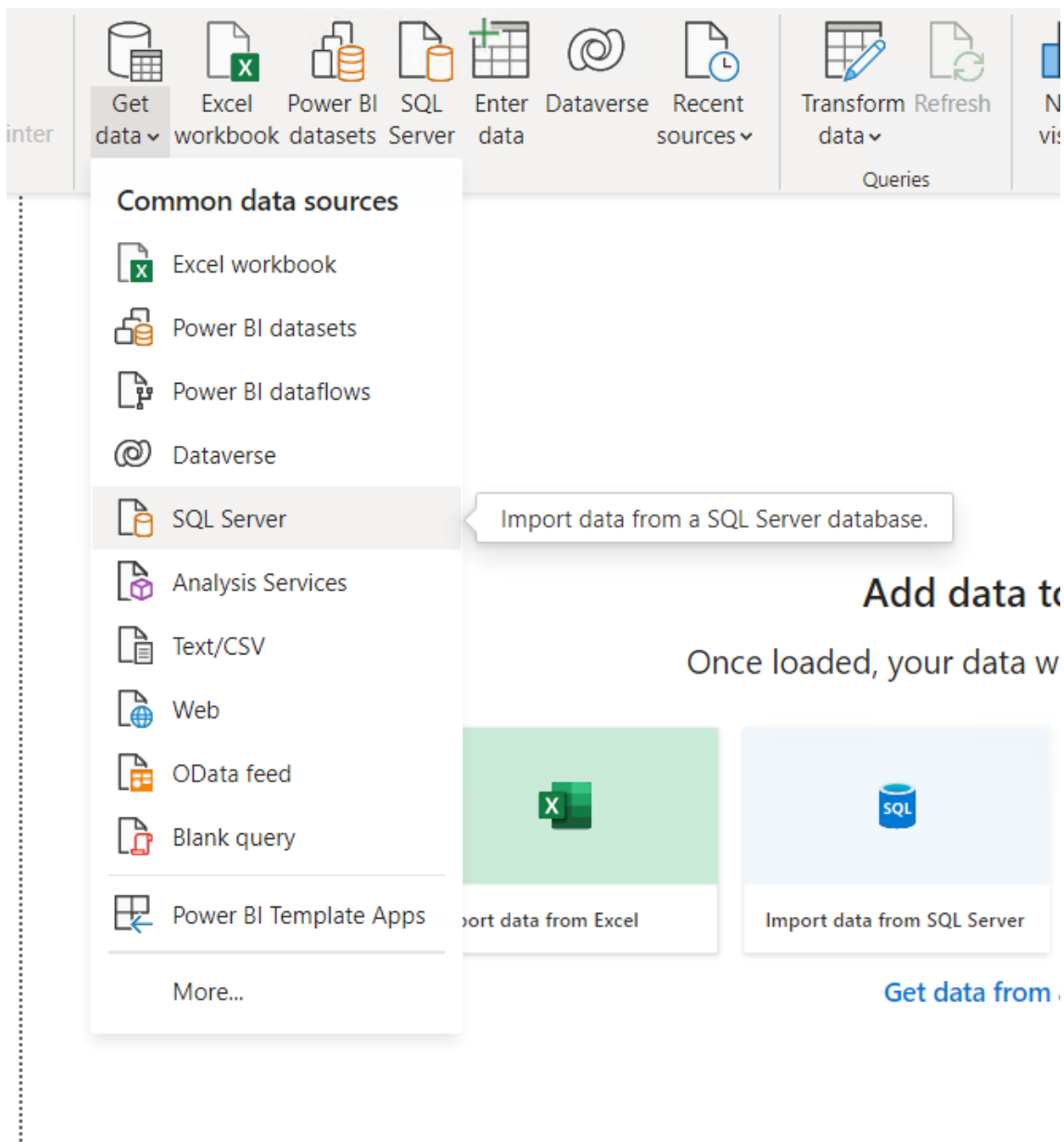Lab environment is already setup.

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. To close the getting started window, at the top-right of the window, click **X**.

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**.

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

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**.

Navigator

Display Options ▾

☑ ▦	DimCurrency
☑ ▦	DimCustomer
☑ ▦	DimDate
☐ ▦	DimDepartmentGroup
☐ ▦	DimEmployee
☐ ▦	DimGeography
☐ ▦	DimOrganization
☑ ▦	DimProduct
☐ ▦	DimProductCategory
☐ ▦	DimProductSubcategory
☑ ▦	DimPromotion
☐ ▦	DimReseller
☐ ▦	DimSalesReason
☑ ▦	DimSalesTerritory
☐ ▦	DimScenario
☐ ▦	FactAdditionalInternationalProductDes...
☐ ▦	FactCallCenter
☐ ▦	FactCurrencyRate
☐ ▦	FactFinance
☑ ▦	FactInternetSales

FactInternetSales

ProductKey	OrderDateKey	DueDateKey	ShipDateKey	CustomerKey	Pro
310	20050701	20050713	20050708	21768	
310	20050701	20050713	20050708	21768	
310	20050701	20050713	20050708	21768	
310	20050701	20050713	20050708	21768	
310	20050701	20050713	20050708	21768	
310	20050701	20050713	20050708	21768	
310	20050701	20050713	20050708	21768	
310	20050701	20050713	20050708	21768	
310	20050701	20050713	20050708	21768	
310	20050701	20050713	20050708	21768	
310	20050701	20050713	20050708	21768	
310	20050701	20050713	20050708	21768	
310	20050701	20050713	20050708	21768	
310	20050701	20050713	20050708	21768	

ℹ The data in the preview has been truncated due to size limits.

Select Related Tables   Load   Transform Data   Cancel

Note: Wait for some time while tables are loaded.

Load

×

:: FactInternetSales
   1,028,696 rows from localhost/AdventureWorksDW.

:: DimCurrency
   105 rows from localhost/AdventureWorksDW.

:: DimCustomer
   18,484 rows from localhost/AdventureWorksDW.

:: DimDate
   2,191 rows from localhost/AdventureWorksDW.

:: DimProduct
   606 rows from localhost/AdventureWorksDW.

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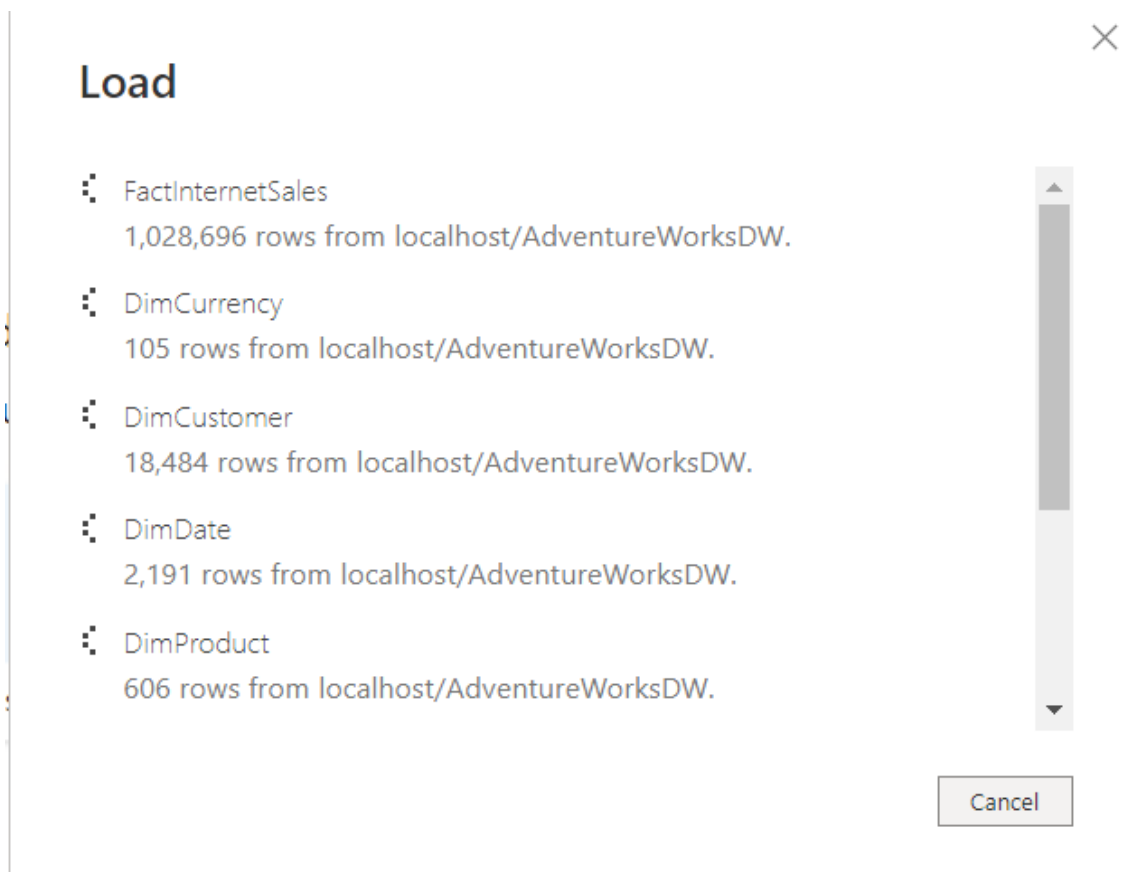
12. On the **File** menu, click **Save**.

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**.

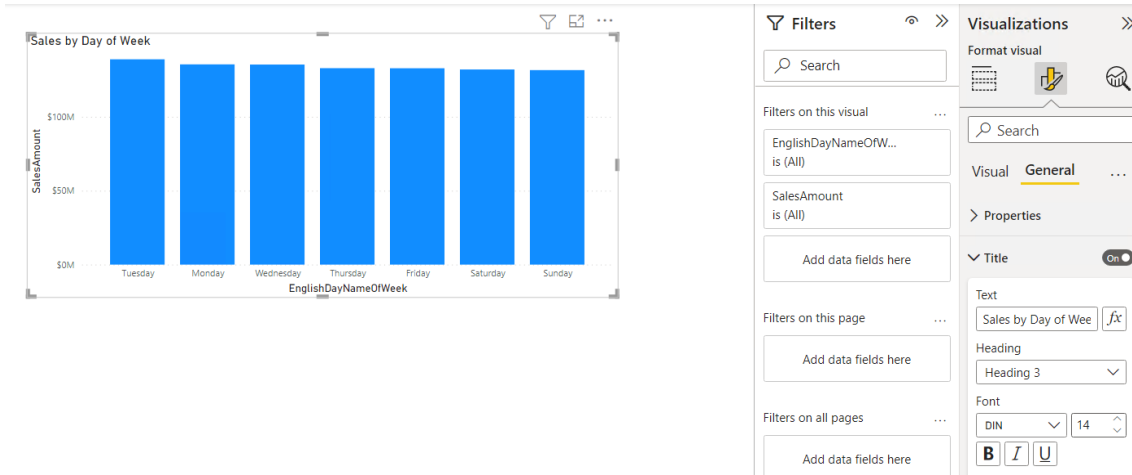**Task 2: Add Visualizations to the Report**

1. In the **FIELDS** pane, expand **FactInternetSales**, and drag the **SalesAmount** field onto the report canvas to create a column chart.
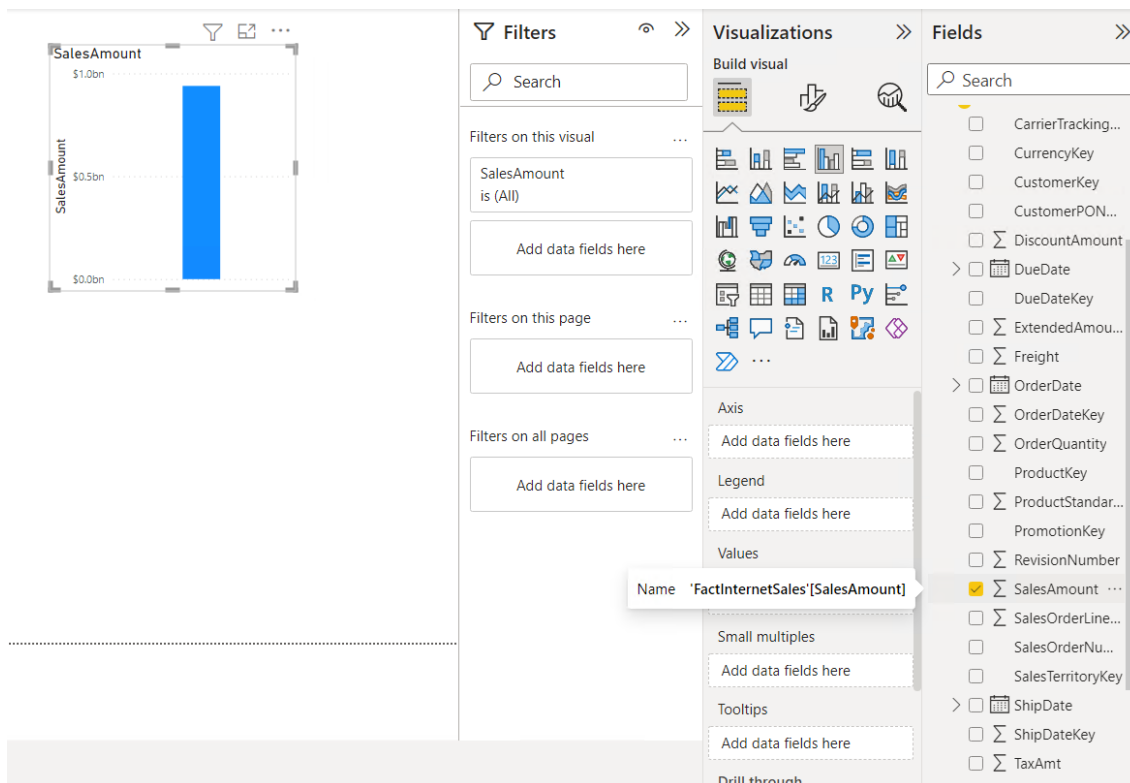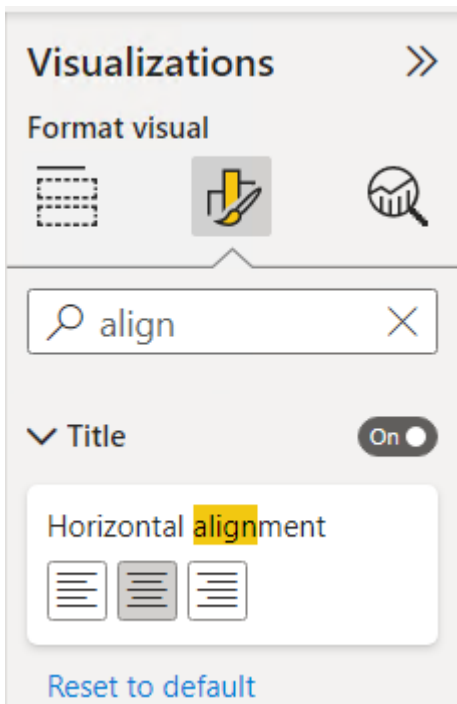
2. Expand **DimDate**, and drag the **EnglishDayNameOfWeek** field to the **Axis** property.
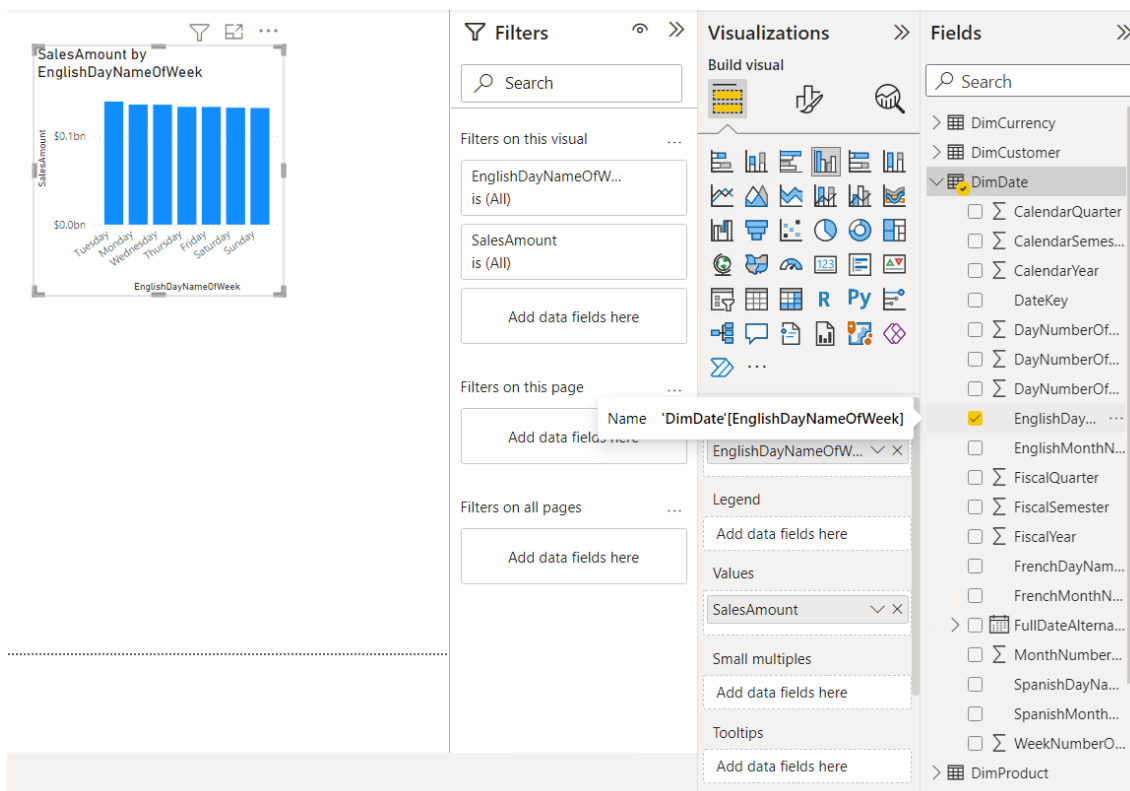
3. Move the chart to the top left-hand corner of the canvas, and expand the chart width so the days of the week display in full.

4. In the **VISUALIZATIONS** pane, click **Format**, and expand **Title**.

5. In the **Title text** box, type **Sales by Day of Week**.

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

7. In the **FIELDS** 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 **Fields**. Drag the **CalendarQuarter** field from **Value** to **Axis**.

10. Click **Format**, and expand **Title**.

11. In the **Title text** box, type **Sales by Calendar Quarter**.

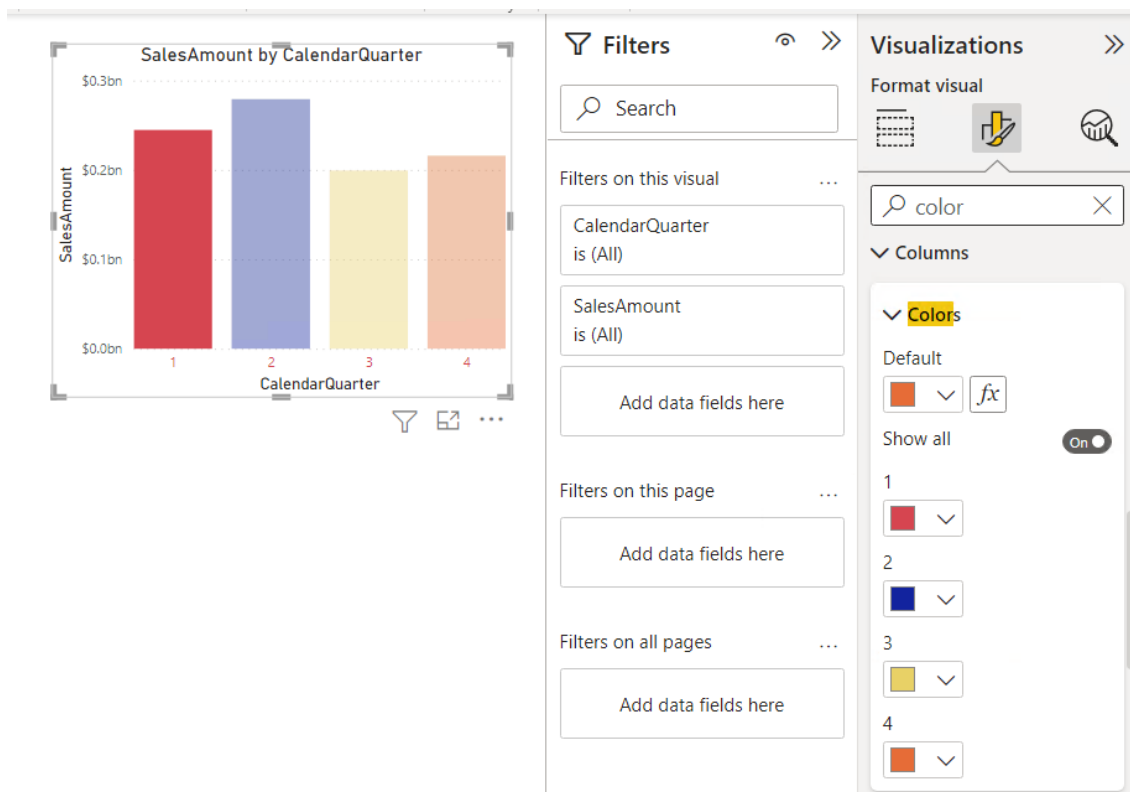12. Next to **Alignment**, click the **Center** icon.

13. Search **Show all** as shown below and set to **On**:
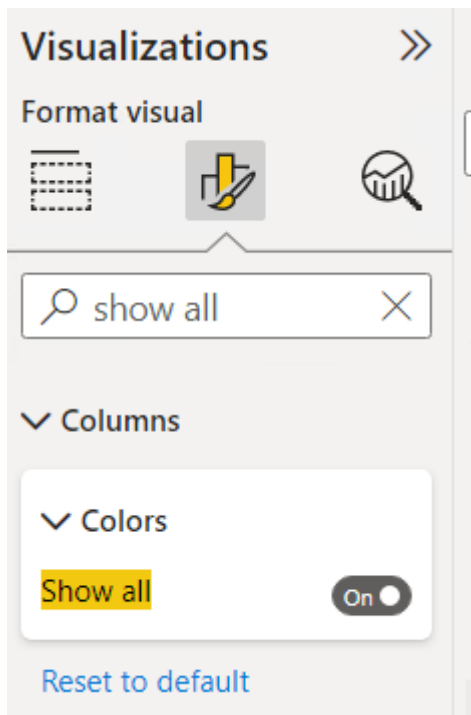
After that change colors, for **1**, select **red**, for **2**, select **blue**, and for **3**, select **yellow**.

14. Move the chart to the right of the **Sales by Day of Week** chart, and expand it so both charts are the same height.

15. In the **FIELDS** 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 enabled it first.

Map and filled map visuals are disabled. To enable them, go to File > Options and settings > Options > Global > Security. See details

Options

×

GLOBAL

Data Load

Power Query Editor

DirectQuery

R scripting

Python scripting

Security

Privacy

Regional Settings

Updates

Usage Data

Diagnostics

Preview features

Auto recovery

Report settings

CURRENT FILE

Data Load

Regional Settings

Privacy

Auto recovery

third-party extensions to load

O (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 ⓘ

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

OK   Cancel

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

17. Expand the map to show all the values.

SalesAmount by SalesTerritoryCountry

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

19. Next to **Alignment**, click the **Center** icon.
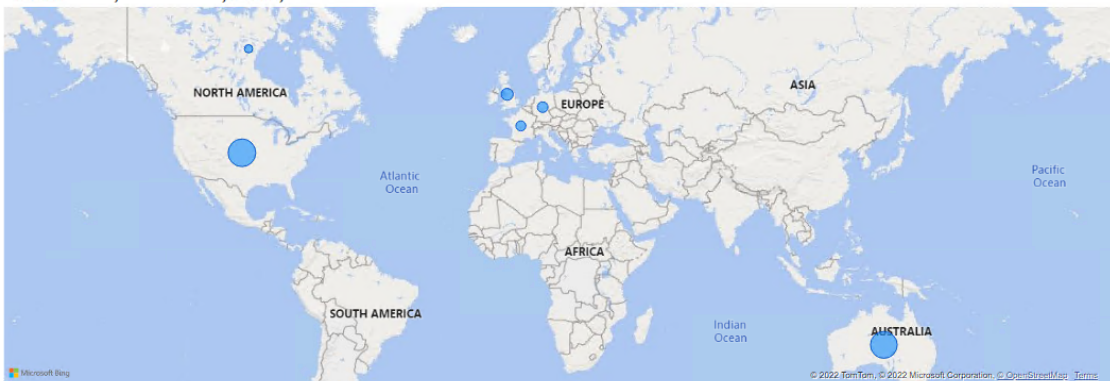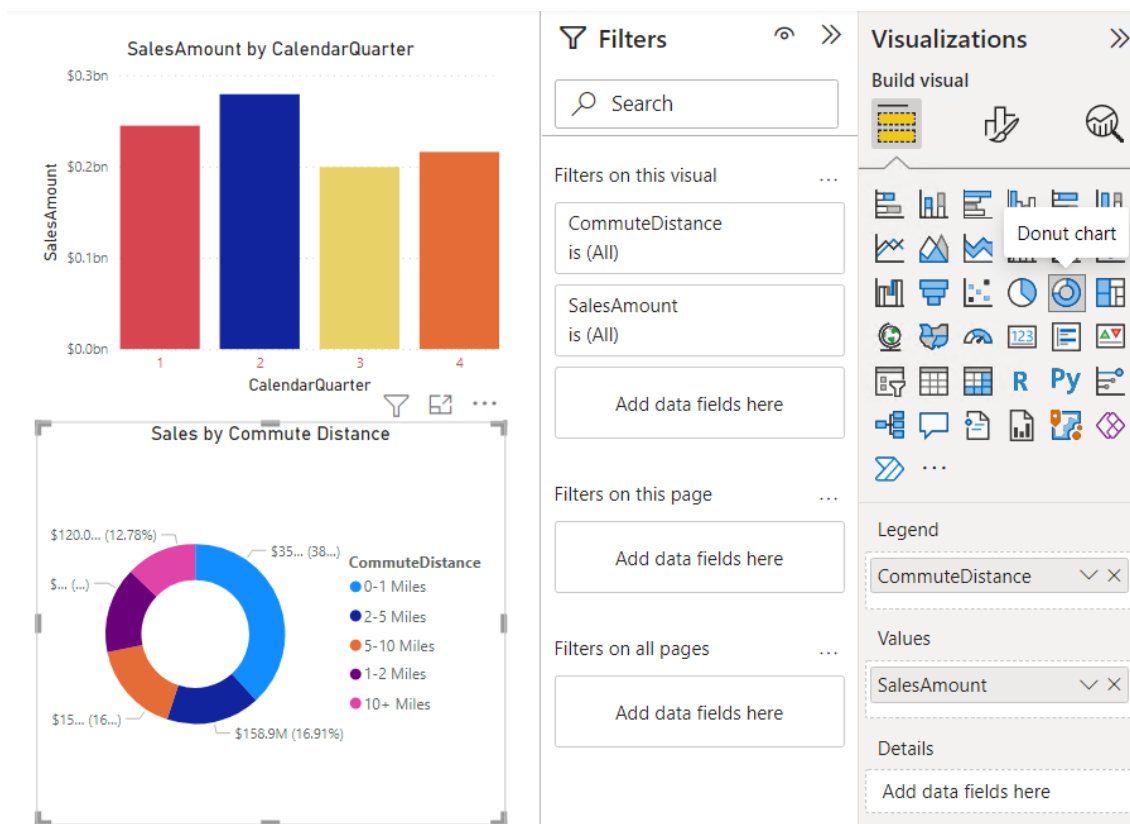
20. In the **FIELDS** pane, expand **DimCustomer**, and drag the **CommuteDistance** field onto the report canvas under the **Sales by Calendar Quarter** chart.

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.

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