

Module 1: Introduction to Self-Service BI Solutions

- [Module 1: Introduction to Self-Service BI Solutions](#)
 - [Lab: Exploring an Enterprise BI Solution](#)
 - [Exercise 1: Lab Environment Setup](#)
 - [Task 1: Prepare the Lab Environment](#)
 - [Exercise 2: Creating a Power BI Report](#)
 - [Task 1: Import Data into Power BI Desktop](#)
 - [Task 2: Add Visualizations to the Report](#)

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.

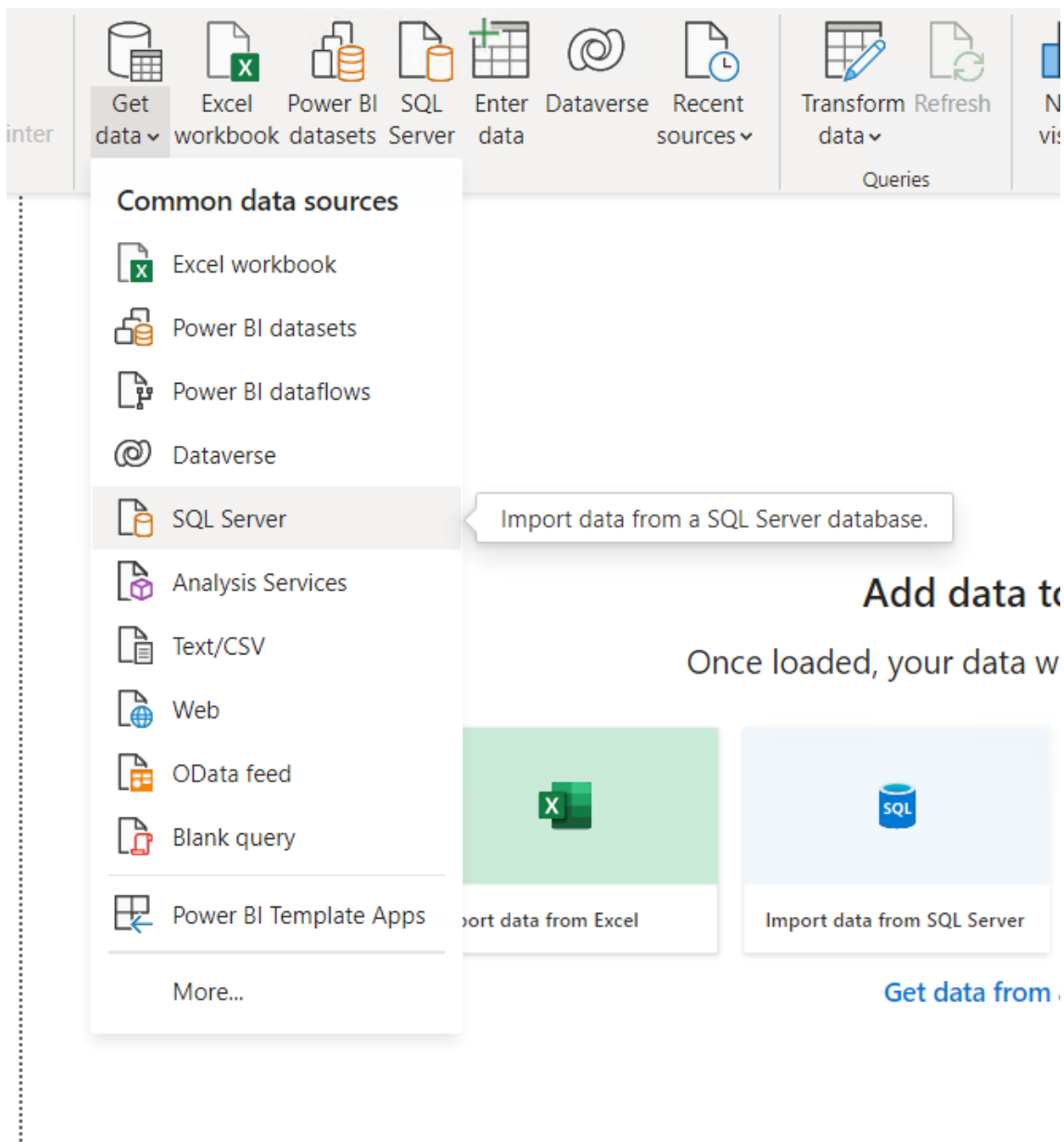
Exercise 2: Creating a Power BI Report

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**.

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**.

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

Windows

Database

Microsoft account

SQL Server database

localhost;AdventureWorksDW

Use your Windows credentials to access this database.

Back

Connect

Cancel

Encryption Support

We were unable to connect to the data source using an encrypted connection. To access this data source using an unencrypted connection, click OK.

OK

Cancel

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

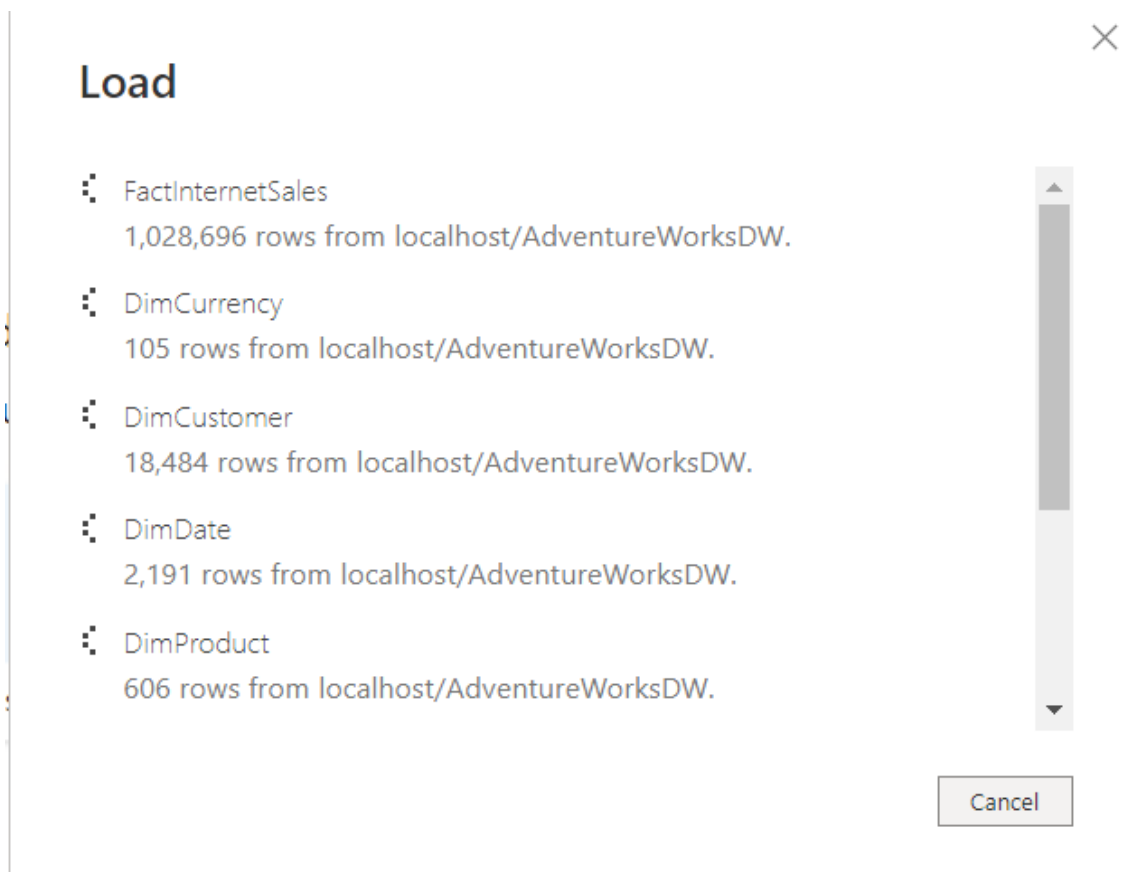
ProductKey	OrderDateKey	DueDateKey	ShipDateKey	CustomerKey	Pro
310	20050701	20050713	20050708	21768	
310	20050701	20050713	20050708	21768	
310	20050701	20050713	20050708	21768	
310	20050701	20050713	20050708	21768	
310	20050701	20050713	20050708	21768	
310	20050701	20050713	20050708	21768	
310	20050701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

(Data truncated due to size limits)

Select Related Tables

Load
Transform Data
Cancel

Note: Wait for some time while tables are loaded.

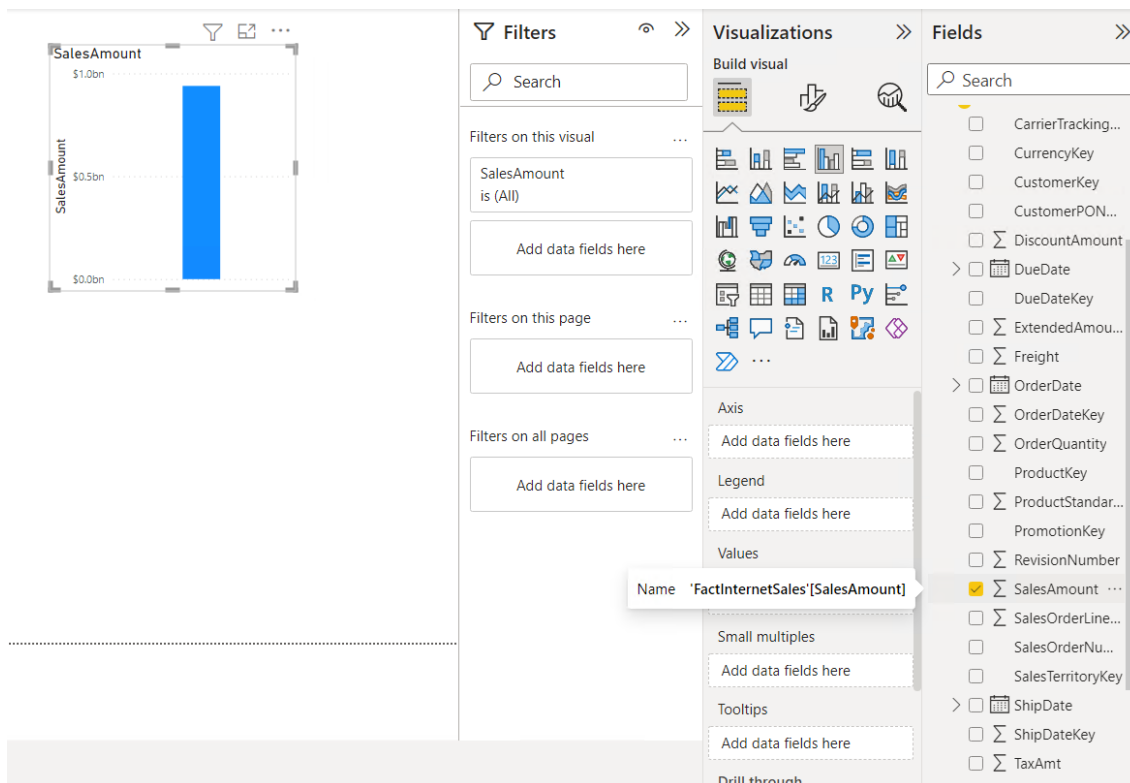


12. On the **File** menu, click **Save**.

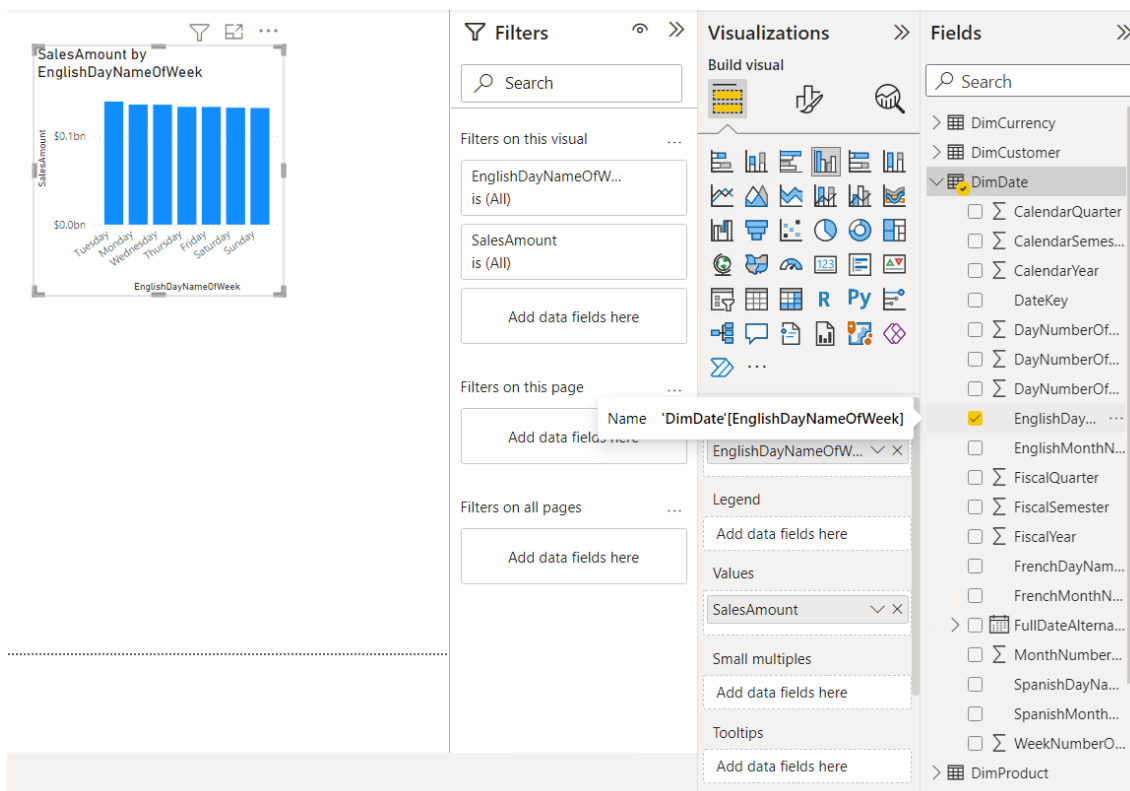
13. In the **Save As** dialog box, browse to the **Desktop\power-bi-quickstart\Labfiles\Lab01\Starter\Project** folder, and in the **File name** box, type **Adventure Works Sales 1**, and then click **Save**.

Task 2: Add Visualizations to the Report

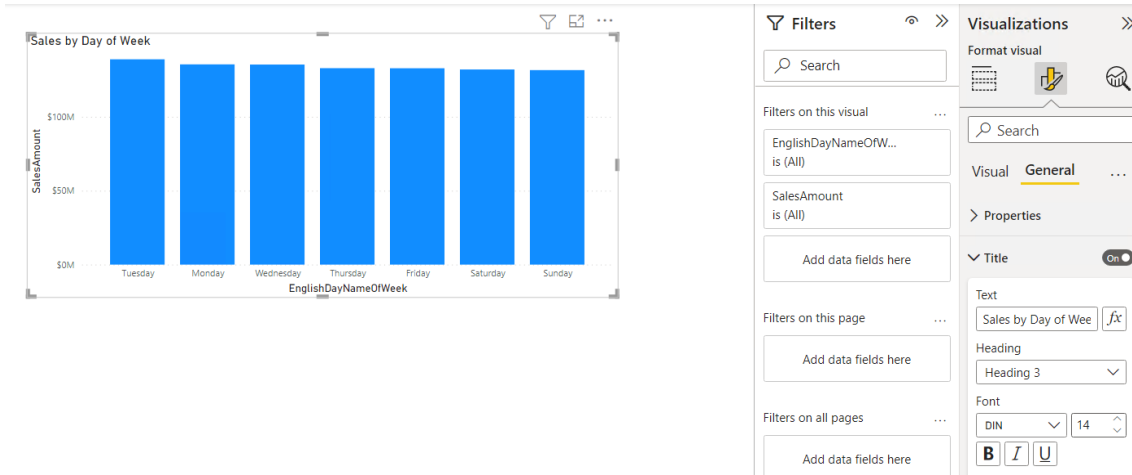
1. In the **FIELDS** pane, expand **FactInternetSales**, and drag the **SalesAmount** field onto the report canvas to create a column chart.



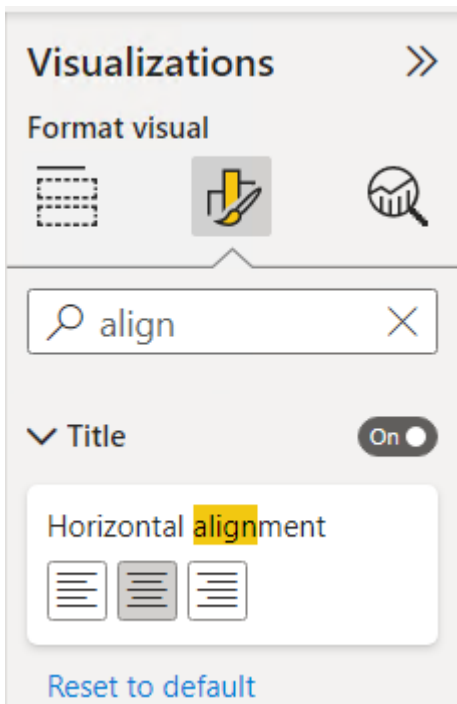
2. Expand **DimDate**, and drag the **EnglishDayNameOfWeek** field to the **Axis** property.



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**.

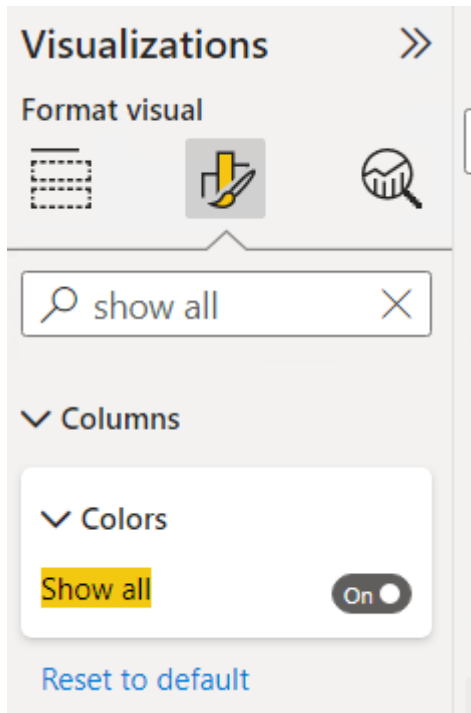


6. Next to **Alignment**, click the **Center** icon.

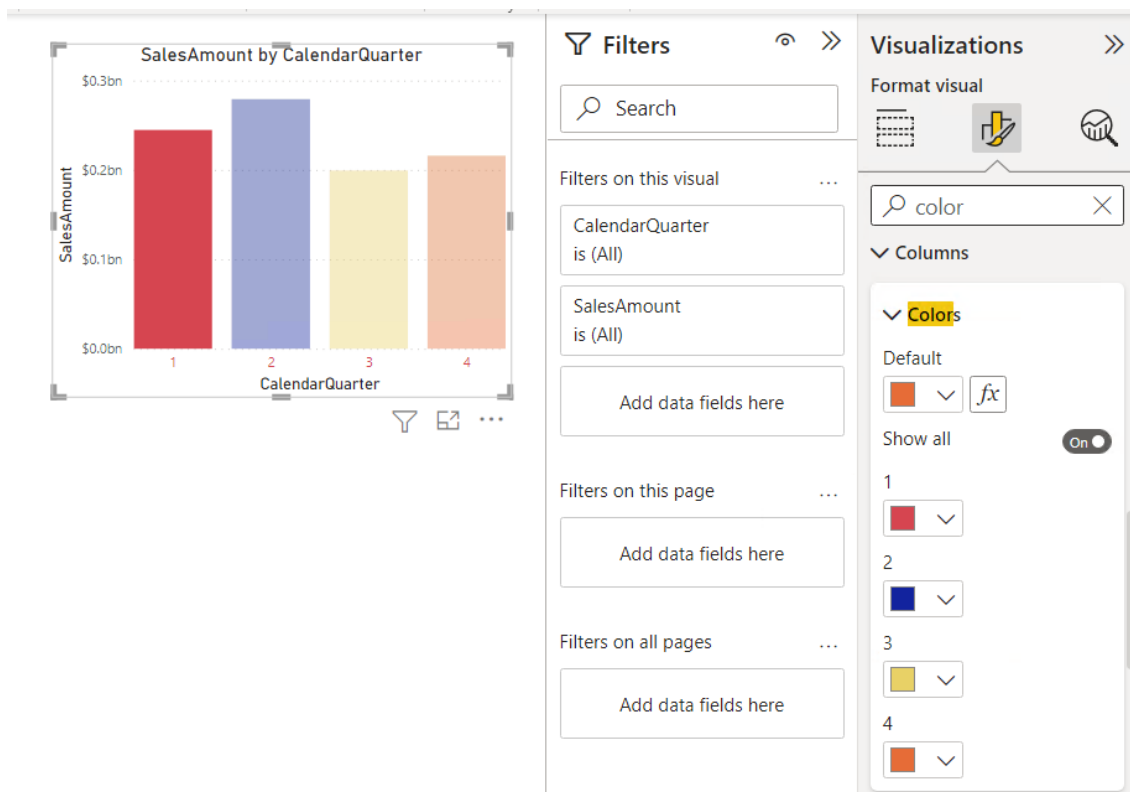


7. In the **FIELDS** pane, under **FactInternetSales**, drag the **SalesAmount** field onto the report canvas to create a column chart.
8. Under **DimDate**, drag the **CalendarQuarter** field onto the chart. Notice that there is only one column.
9. In the **VISUALIZATIONS** pane, click **Fields**. Drag 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**:

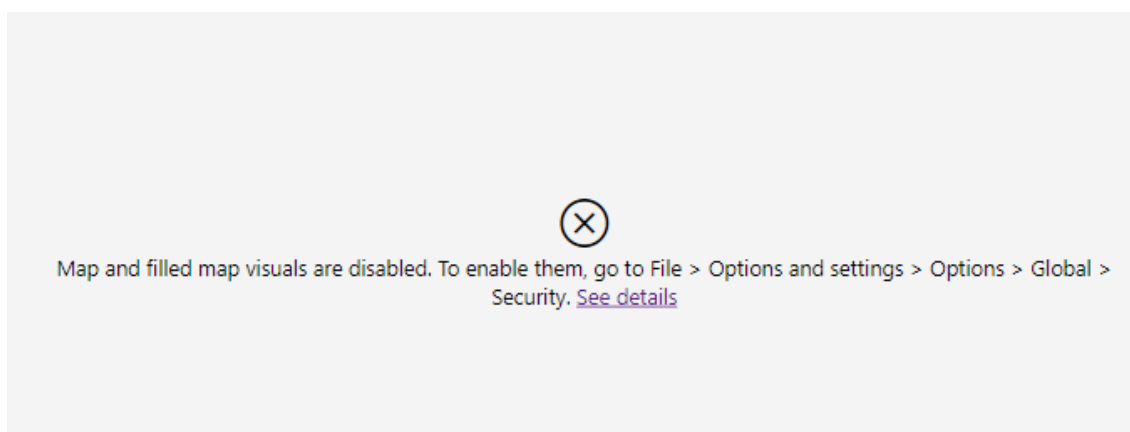


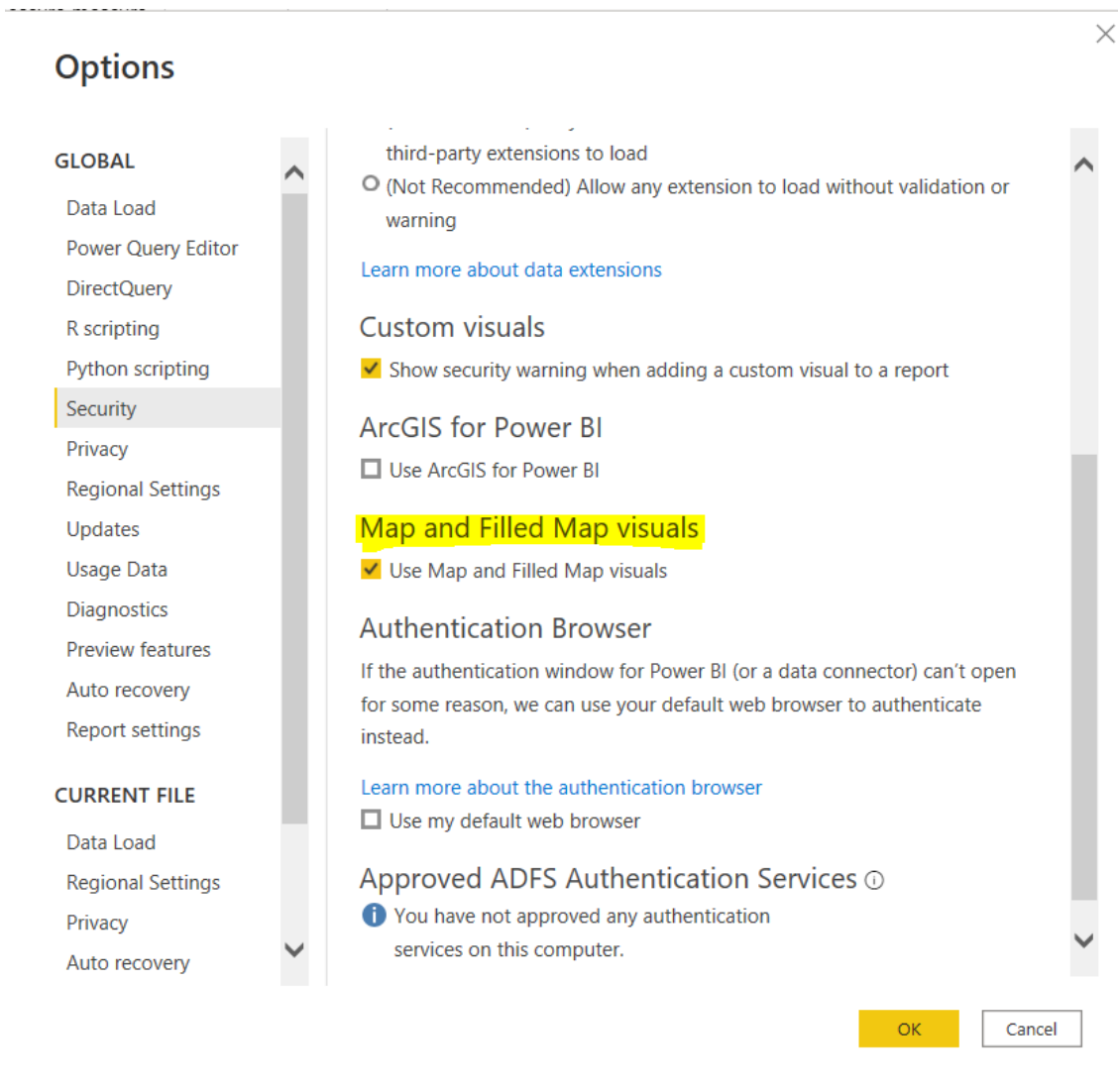
After that change colors, for **1**, select **red**, for **2**, select **blue**, and for **3**, select **yellow**.



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 enable it first.

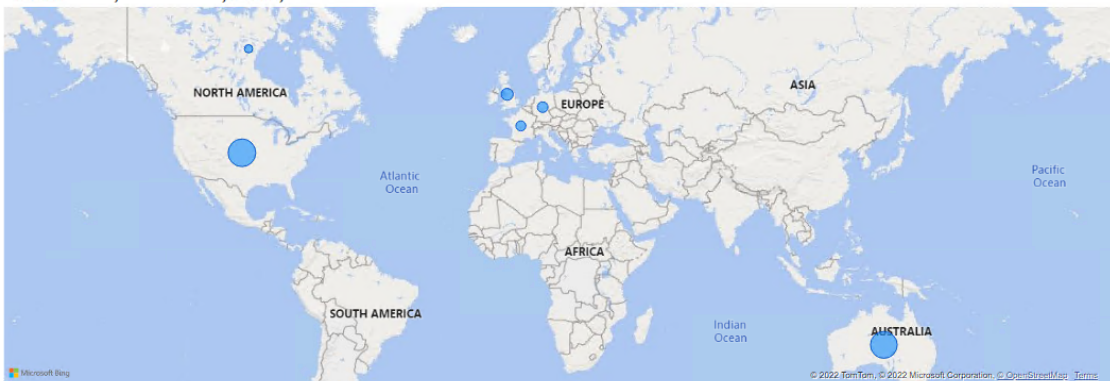




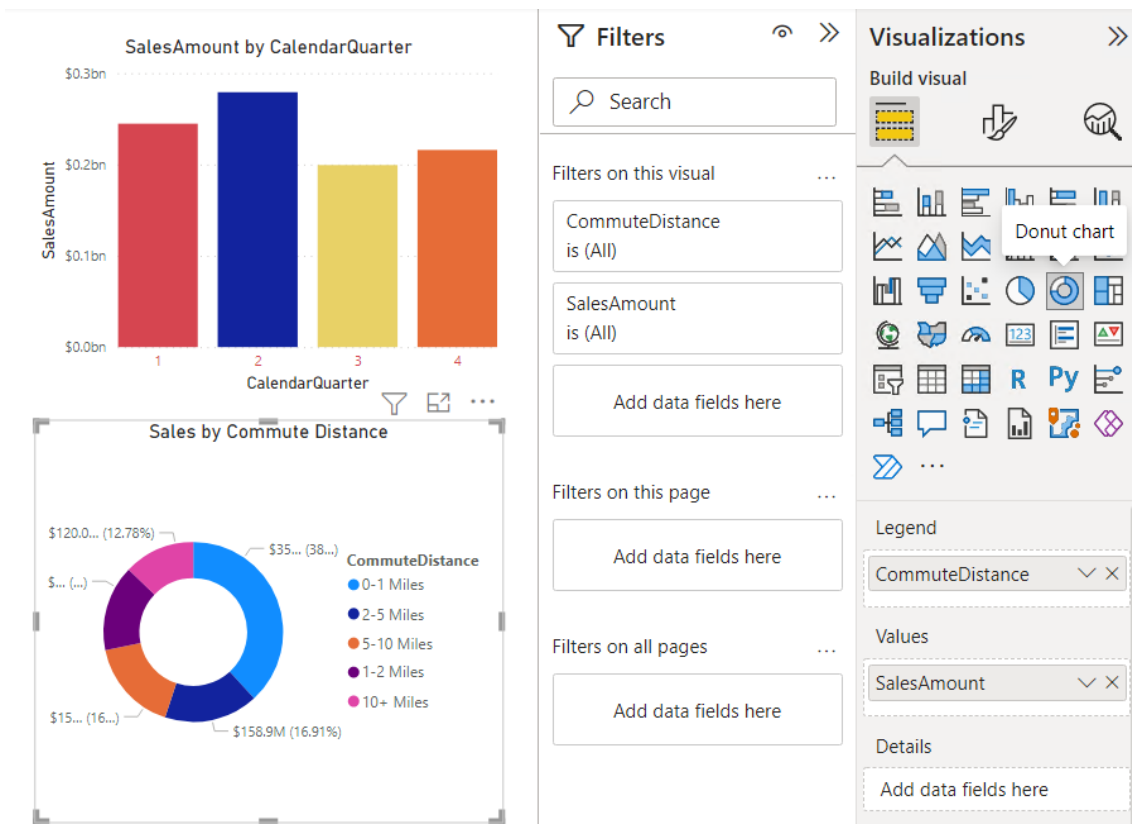
16. Under **FactInternetSales**, drag the **SalesAmount** field onto the map.

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**.