

Power BI – Creating Reports

Start a Report and Add Title

1. Open **Report. PBIX**
2. Click **insert**
3. Click **buttons** in the **elements** group, the buttons gallery opens
4. Click **Blank**, notice **Blank button** inserted
5. Resize **Blank button** by using diagonal double headed arrow, then **drag the corner down and to the right**
6. Click **button** then select **Format Visual**
7. Click **Button Style** to expand the style section
8. Click the **text heading** switch to **on**
9. Click **text**
10. Click **text**, and type **sales report**
11. Click **font** and then choose the **font type**
12. click **font size** then specify **font size**
13. Click **font colour** then click the **text column**
14. click **horizontal** alignment either **left, centre or right**
15. Click **vertical** alignment either **top middle or bottom**
16. click **the padding option** either, **top right bottom or left** and adjust the padding distance
17. Click **Save**
18. **Continue to next exercise with this visual**

Add visuals

1. Click **Build Visuals**
2. Click **Clustered Bar Chart**
3. Expand the **Transaction Table** and **Select Country**
 - a. Country field appears in the Y-axis Box
4. Click **Sales**,
 - a. Sales field appears in the **X-axis Box**
 - b. Note both Country and **Sales data** appear in the Visual
5. Click on the **Canvas (outside the Visual)** and then Click **Table chart**
 - a. Table chart appears on the canvas
6. Click **Segment**
 - a. Segment field appears in the **Column Box**
 - b. Segment appears in the **first Column** of the table
7. Click **Sales**
 - a. Sales field appears below the **segment field**
 - b. Sales data appears in the **second Column** of the table

8. Click on the canvas then select **table chart**
 - a. A second table visual appears
9. Click **Product**
 - a. Product field appears in **Column Box**
 - b. Product date appears in **first column** of the table
10. Click **Sales**
 - a. Sales field appears below **segment field in the Column Box**
 - b. Sales data appears in the **second Column** of the table
11. Drag the **product table** to the **upper right side** of the canvas
12. Drag the **segment table** and position to the **left of the product table**
13. With the **segment table** still selected, Click format **visual**
14. Set **title heading** switch to **on**
15. Click **title** to expand the **title section**
16. Click **text** and type the title text '**sales by segment**' and format as needed
17. Click the **product table** and apply a title "**Sales by Product**"
18. Click **outside the table to deselect** it
19. Click **Matrix Visual**
20. Click **County**
21. Click **Segment**
 - a. The Country field and **Segment field appear** in the **Rows box**
22. Click **Product**
 - a. The **Product field** appears in the **Columns box**
23. Click **Sales**
 - a. The **Sales field** appears in **the Values box**
 - b. The **data** appears in the **matrix visual**
24. Drag the **matrix** to below the **two Sales tables**, and then **resize it** to display most of its contents with some of the **Country rows expanded**
25. With the **matrix visual** still selected, apply a **title**. This example uses **Product Matrix (Sales)**
26. **Reposition, resize, and format** the clustered bar chart
27. Click **Save**
28. **Take a screenshot**
29. **Continue to next exercise with this visual**

Add a Slicer to a Report

1. Click Expand to the left of **TransactionTable** to expand the listing
2. Click **Build Visual**
3. Click **Slicer**
 - a. A slicer appears on the canvas
4. Click **Country**
 - a. The Country field **appears in the Field box**
 - b. The Country data **appears in the slicer**
5. Drag the slicer to **above the Sales by Segment table**

6. Click **Format Visual**
7. Click **Visual**
8. Click **Slicer settings**
9. Click **Style**, and then **click Dropdown**.
 - a. The slicer changes to a **drop-down list**.
10. **Resize the slicer** to suit the heading and drop-down list
11. Click **More options**.
 - a. The More Options menu opens
12. Click **Search**.
 - a. The slicer takes on search capabilities
13. Click a **blank area of the canvas**
14. Create a **second search-capable slicer** in drop-down format.
 - a. Assign the **Segment** field to this slicer
 - b. Position the slicer to the **right of the Country slicer**
15. Create a **third search-capable** slicer in drop-down format.
 - a. Assign the **Product** field to this slicer
 - b. Position the slicer to the **right of the Segment slicer**
16. Click **Save**
17. **Take a screenshot**
19. **Continue to next exercise**

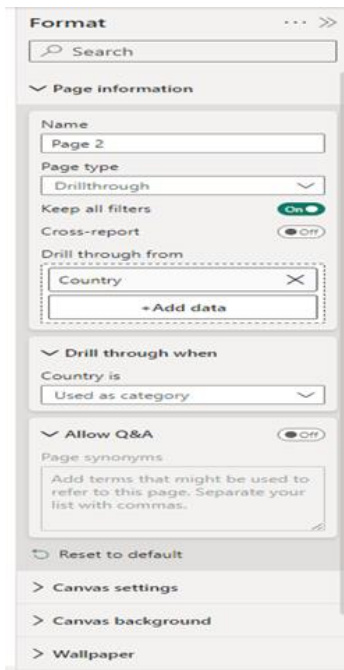
Control Which Visuals and Sliders Interact

1. Click the **Country slicer**
2. Click **Format**
3. Click **Edit interactions**
4. For the **Sales by Segment** visual, click **None**
 - a. When the **None icon becomes active**, the **Filter icon becomes inactive**
5. For the **Sales by Product** visual, click **None**
6. **Take a screenshot**
7. Click **Edit Interactions**
8. Click **Save**

Enable and Control Drill-Through Actions from Page 1 to Page 2(target page)

1. Click **New page**
 - a. A new page appears
2. Click **Build Visual**
3. Click **Table**

4. Click to **expand** the **TransactionTable** listing
5. Click **Segment**
 - a. The **Segment field** appears in the **Column box**
 - b. The Segment data appears as the **first column in the table**
6. Click **COGS**
 - a. The **COGS field** appears below the **Segment field**
 - b. The **COGS field** appears as the **second column** in the table
7. Click **Manufacturing Price**
8. Click **Gross Sales**
9. Click **Sales**
10. Click **Discounts**
 - a. The Manufacturing Price field, Gross Sales field, Sales field, and Discounts field **appear in the table**
11. Drag the lower-right **corner to resize** the table visual so that you can see all its columns
 - a. The **columns appear in the order** in which you added the fields
 - b. Click the **canvas to deselect the visual**
 - c. Click **Table**
12. Click **Product**
13. Click **COGS**
14. Click **Manufacturing Price**
15. Click **Gross Sales**
16. Click **Sales**
17. Click **Discounts**
 - a. The Product, COGS, Manufacturing Price, Gross Sales, Sales, and Discounts fields **appear in the Columns box in that order**
18. Click **a blank space on the canvas**. The **second table** visual becomes **deselected**
19. Click **Format Visual** and select **Page Information**



20. Set page type to **Drill Through**
21. Drag and drop **Country to Drill through from**
22. Click **Drill through when** – choose “**Used as category**”
23. Click **Page 1**. Page 1 appears
24. **Right-click France** in the **Sales by Country** visual.
 - a. The contextual menu appears.
25. Click **Drill through**.
 - a. The continuation menu opens. **Take a Screenshot of this**
26. Click **Page 2**. Page 2 appears.
 - a. **The visuals show data for France**, because that is the country from which you clicked through to Page 2
27. Click **Back**
28. Click **Save**

Split a Page into Sections

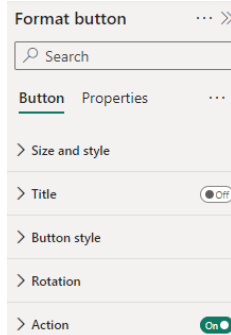
1. If Page 1 is not already displayed, **click Page 1 to display it**
2. Press **Ctrl+A** to select all the visuals on the page
3. Click **Home** to display Home tab
4. Click **Copy** to copy the visuals to the Clipboard
5. Click **New Page**
 - a. A new page appears and becomes the active page
6. Click **Format Page**
7. Click **Canvas settings** to expand the Canva Settings section
8. Click **Type**, and then click **Custom**
9. Click Height, and specify **1440**
10. Click Width, and specify **2560**
11. Click **Insert**.
 - a. The Insert tab of the ribbon appears
12. Click **Shapes**.
 - a. The Shapes gallery opens.
13. Click **Line**.
 - a. A horizontal line appears on the page,
14. **Drag the line to halfway down the page**
 - a. A midline guide appears when the line is halfway down
15. **Extend the line** all the way across the page
16. Repeat **steps 11 to 13** to insert another line
17. Click **Shape**.
 - a. The Shape tab of the **Format pane** appears.
18. Click **Rotation**.
 - a. The **Rotation section** expands.

19. Click **shape, and specify 90 degrees**. The line becomes vertical.
20. **Extend the line all the way to the bottom of the page**, so that the canvas contains four equally sized rectangular sections
21. Click **Home**
22. Click **Paste**
23. With the visuals still selected from you pasting them, press **Ctrl+click** the **Sales Report title to deselect it**
24. Press **Ctrl+click** the **label** at the top of **each of the three Slicers to deselect them**
25. With the remaining visuals still selected, click **Copy**
26. Click **Paste**
 - a. The pasted visuals appear on top of the existing visuals. They remain selected.
27. **Drag and Drop visual** to other sections of the Canvas
28. Repeat **steps 26 to 27** to populate the two remaining sections
29. Click **Expand**
30. In the **upper-right section**, click the Sales by **Country clustered bar chart**.
 - a. The chart becomes selected.
31. Drag Country from the Fields pane to the **Filters on This Visual box**
32. Click **Country** in the **Filters on This Visual box**.
 - a. The Country filter expands.
33. Click **Canada**
34. Click **each visual** in the upper-right section in turn, and then **repeat steps 31 to 32** to make each visual show data for **Canada**
35. Repeat **steps 31 to 32**, but this time work in the **lower-left** section and set the country to a difference country, such as **Germany**
36. Repeat **steps 31 to 32** a **second time**, but this time work in the **lower-right** section and **set the country** to a third country, such as **United State of America**
37. Click **Save**
38. **Take a screenshot**

Add Bookmarks to a Report

1. Click **View**.
 - a. The View tab ribbon appears.
2. Click **Bookmarks**
 - a. The Bookmarks pane opens between the Filters pane and the Visualizations pane
3. Click **Add**
4. Double-click **Bookmark 1**
5. Type **Default** and press **Enter**
6. Repeat **steps 2 to 4** to create a bookmark named **“Change View”**
7. **Right-click** the **Change View** bookmark
8. Click **Selected Visuals**
9. Click **Selection**

- a. The Selection pane opens between the Filters Pane and the Bookmarks pane
- 10. Click **Hide Visual** next to **Sales by Country**, next to **Sales by Segment**, next to **Sales by Product**, and next to **Product Matrix (Sales)**
- 11. In the **Selection pane**, click **Sales by Country**. The **Sales Country Button** becomes selected.
- 12. **Shift+click** Product Matrix (Sales)
 - a. The buttons for the four visuals become selected.
- 13. **Right-click** the **Change View bookmark**.
 - a. The contextual menu opens.
- 14. Click **Update**
- 15. Click the **Default** bookmark
- 16. **Take a screenshot**
- 17. Click **Collapse** to collapse the **Selection pane**
- 18. Click **Collapse** to collapse the **Bookmarks pane**
- 19. Click **Expand** to expand the **Visualization pane**
- 20. Click **Insert**
- 21. Click **Buttons**
- 22. Click **Bookmark**.
 - a. A bookmark button appears
- 23. Reposition and resize the bookmark button
- 24. Click **Format Visual – Format Button** pane appears



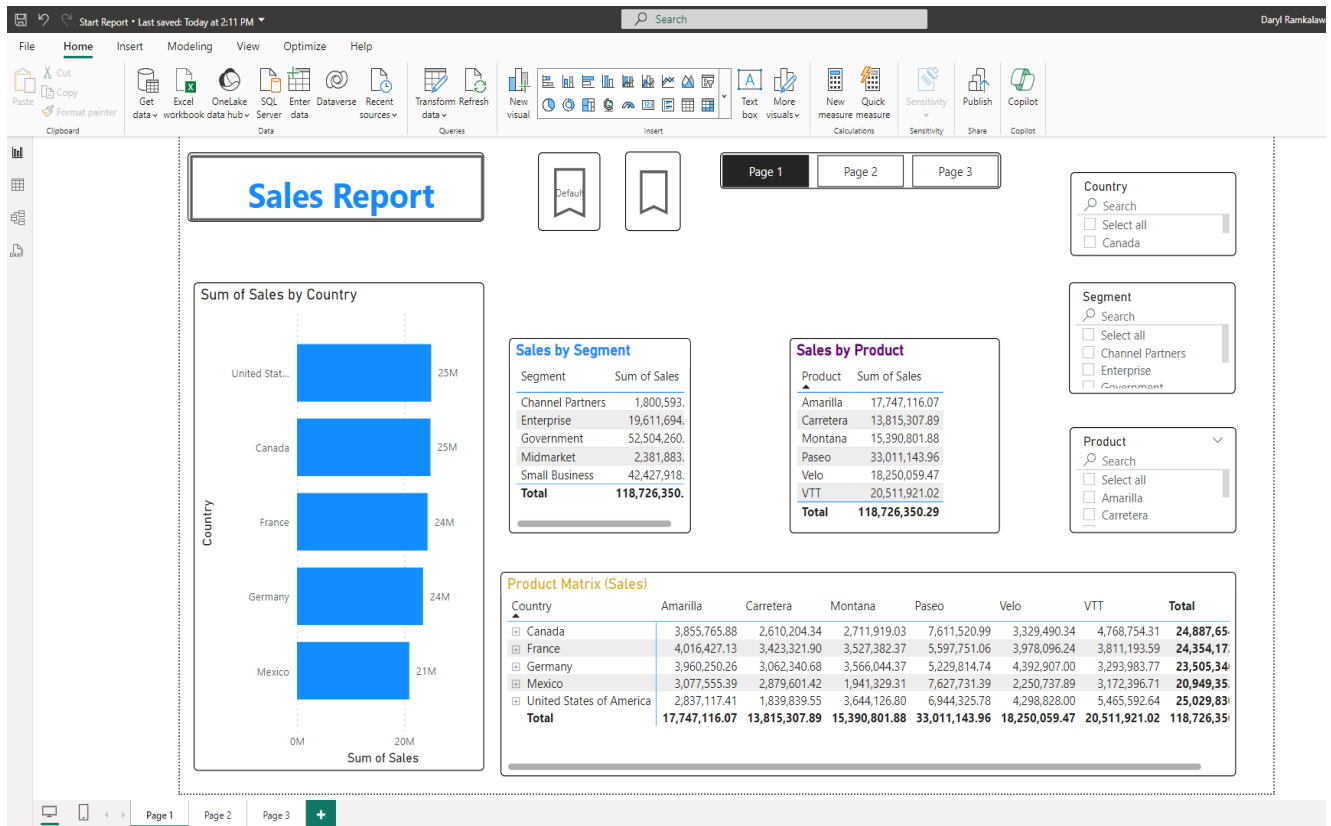
- 25. Click **Button**
- 26. Click **Action** to expand the **Action section**
- 27. Click **Bookmark**, and then click **Default**
- 28. Repeat **steps 20 to 26** to create a second bookmark, this time clicking **Change View** in the **Bookmark drop-down list**
- 29. Add **Tooltips** to the label
- 30. **Take a screenshot**

Add Page Navigation to a Report

- 1. Click **Insert**
 - a. The Insert tab of the ribbon appears
- 2. Click **Buttons**
 - a. The Buttons gallery opens

3. Click **Navigator**
 - a. The Navigator gallery opens
4. Click **Page navigator**
5. Drag the **page navigator** control to where you want it
6. Click **Save**
7. **Take a screenshot**
8. Click **Close**

Sample – Page 1



Start Report • Last saved: Today at 2:11 PM

File Home Insert Modeling View Optimize Help

Paste Cut Copy Format painter Clipboard

Get data Excel workbook data hub SQL Server Enter data Data Lake Recent sources Transform data Refresh data Queries New visual

Product	Sum of COGS	Sum of Manufacturing Price	Sum of Gross Sales	Sum of Sales	Sum of Discounts
Amarilla	3,348,113.00	4,680	4,123,204.50	3,960,250.26	162,954.24
Carretera	2,692,666.00	60	3,306,376.00	3,062,340.68	244,035.32
Montana	3,006,606.00	90	3,798,355.00	3,566,044.37	232,310.63
Paseo	4,485,398.00	400	5,555,838.00	5,229,814.74	326,023.26
Velo	3,604,118.00	2,640	4,637,903.00	4,392,907.00	244,996.00
VTT	2,688,051.00	5,500	3,499,791.00	3,293,983.77	205,807.23
Total	19,824,952.00	13,370	24,921,467.50	23,505,340.82	1,416,126.68

Segment	Sum of COGS	Sum of Manufacturing Price	Sum of Gross Sales	Sum of Sales	Sum of Discounts
Channel Partners	89,067.00	2,319	356,268.00	336,425.88	19,842.12
Enterprise	4,188,300.00	1,979	4,362,812.50	4,086,826.25	275,986.25
Government	8,775,720.00	5,399	12,011,352.00	11,452,895.94	558,456.06
Midmarket	215,990.00	2,076	323,985.00	301,344.75	22,640.25
Small Business	6,555,875.00	1,597	7,867,050.00	7,327,848.00	539,202.00
Total	19,824,952.00	13,370	24,921,467.50	23,505,340.82	1,416,126.68

Sample – Page 3

