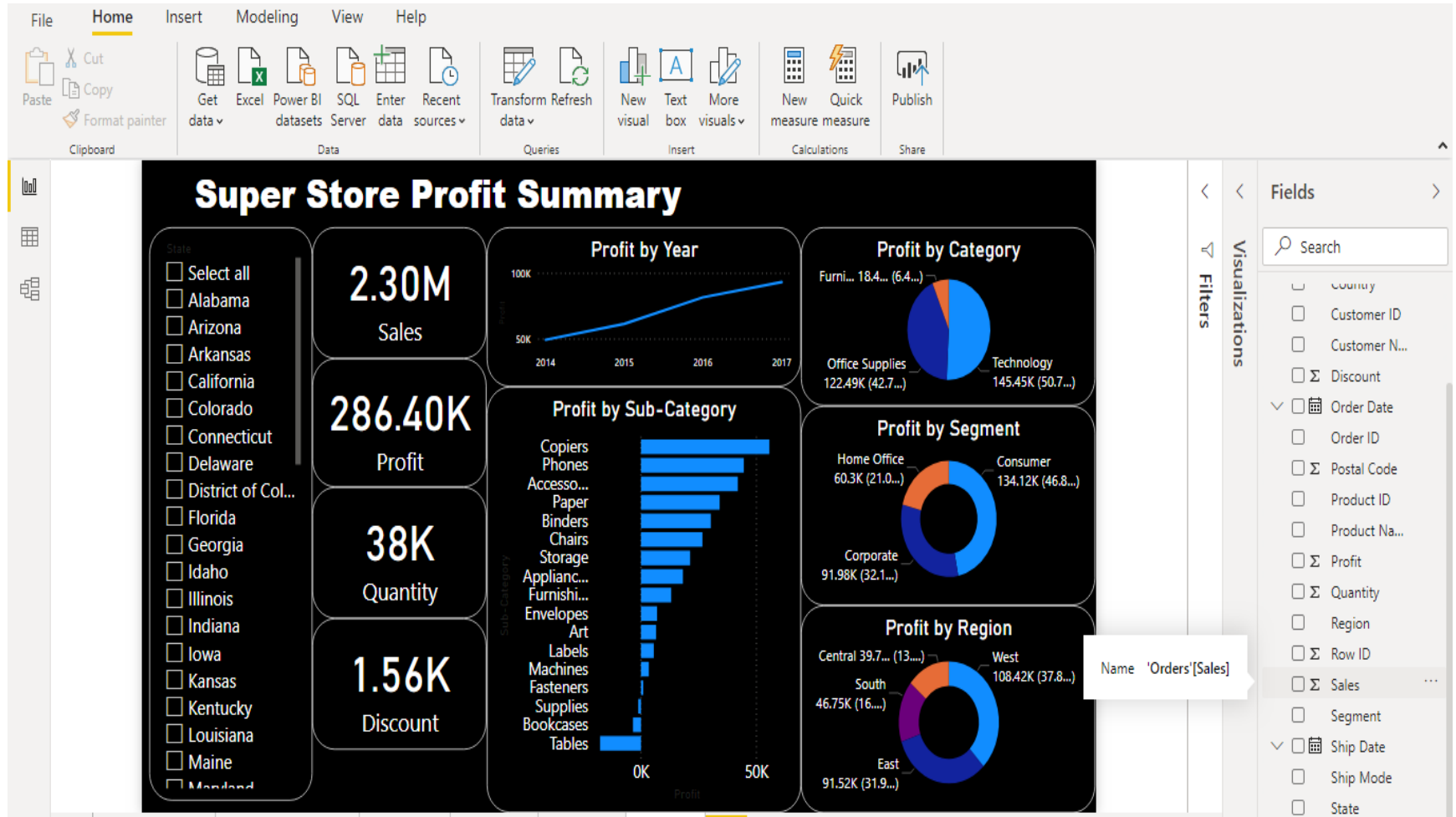


Creating Report in Power BI

A Report is a combination of multiple Visuals



Publishing On Power BI Service

Power BI Service is a sharing tool to share the visualization with other users. You need to create a Power BI Service account and publish your creation on it

Home - > Publish

The screenshot displays the Power BI Desktop application interface. The top ribbon includes tabs for File, Home, Insert, Modeling, View, and Help. The Home tab is active, showing various icons for data sources, queries, visualizations, and calculations. A 'Publish' button is visible in the top right corner of the ribbon. In the background, a dashboard titled 'Super Store' is visible, featuring a list of states on the left and several data visualizations, including a bar chart and a donut chart. A 'Publish to Power BI' dialog box is open in the foreground, prompting the user to 'Select a destination'. The dialog box has a search bar and a list of destinations, with 'My workspace' currently selected. The 'Select' button is highlighted in yellow.

Super Store

State

- ☐ Select all
- ☐ Alabama
- ☐ Arizona
- ☐ Arkansas
- ☐ California
- ☐ Colorado
- ☐ Connecticut
- ☐ Delaware
- ☐ District of Col...
- ☐ Florida
- ☐ Georgia
- ☐ Idaho
- ☐ Illinois
- ☐ Indiana
- ☐ Iowa
- ☐ Kansas
- ☐ Kentucky
- ☐ Louisiana
- ☐ Maine
- ☐ Maryland

2.30 Sales

286.4 Profit

38 Quantity

1.56K Discount

Machines
Fasteners
Supplies
Bookcases
Tables

0K Profit

50K Profit

South 46.75K (16....)

East 91.52K (31.9...)

108.42K (37.8...)

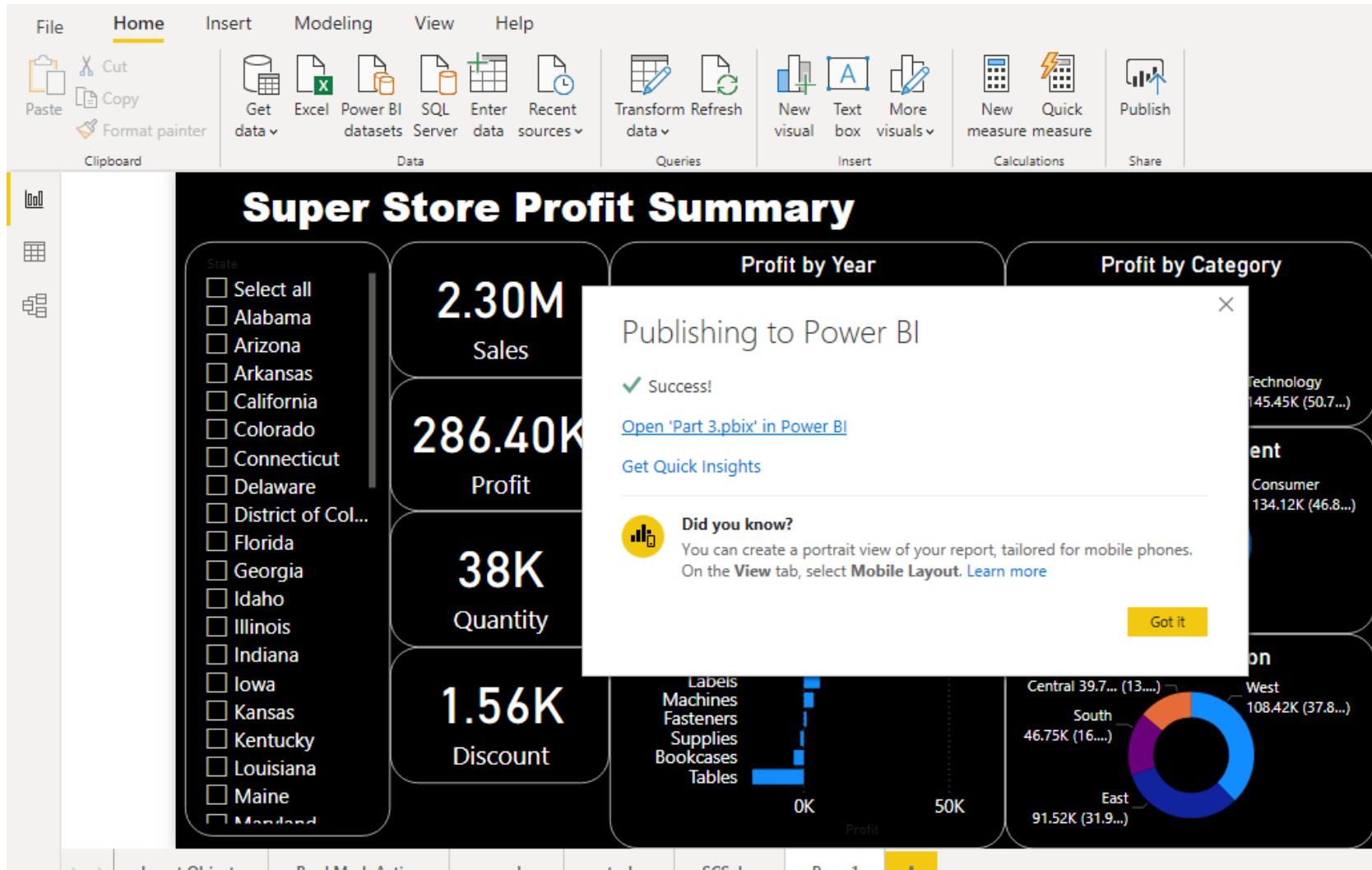
Publish to Power BI

Select a destination

My workspace

Select Cancel

Publishing On Power BI Service



Power BI Service

Comments, Subscribe, Share

<

Comments

PART 3

Previous | Next

Enter your comments here, and @mention people to grab their attention.

Post

rajeev garg

13 minutes ago

State Interactive Profit Summary

Close

Show all

×

Subscribe to emails

PART 3

+ Add new subscription

Page 1

Run Now

On

Subscribe

rajeev garg × rajeev@rcorpginie.com × Enter email addresses

Subject

SuperStore Summary

SuperStore Summary

Manage all subscriptions

Save and close

Cancel

Share report

PART 3

Share Access

Only users with Power BI Pro will have access to this report. Recipients will have the same access as you unless row-level security on the dataset further restricts them. [Learn more](#)

Grant access to

Enter email addresses

Include an optional message

☒ Allow recipients to share your report

☒ Allow recipients to build new content using the underlying datasets

☒ Send an email notification to recipients

☐ Include my changes

Report link ⓘ

<https://app.powerbi.com/groups/me/reports/4ba786a6-0c7c-42f1-9a3f-62de747>

Share

Cancel



Dashboard in Power BI

In Power BI dashboard can be created only in Power BI Service. To add a visual you just need to pin the Visual to the dashboard.

Pin to dashboard

Select an existing dashboard or create a new one.

Where would you like to pin to?

- ☐ Existing dashboard
- ☒ New dashboard

Dashboard name

Pin Cancel

Tile Theming

- ☒ Use destination theme
- ☐ Keep current theme

Profit BY CATEGORY

Discount

1.56K

Machines Fasteners Supplies Bookcases Tables

0K 50K

by Region

South 46.75K (16...)

East 91.52K (31.9...)

West 108.42K (37.8...)

by Segment

Consumer 134.12K (46.8...)

by Category

Technology 145.45K (50.7...)

☒ Kansas

☒ Kentucky

☒ Louisiana

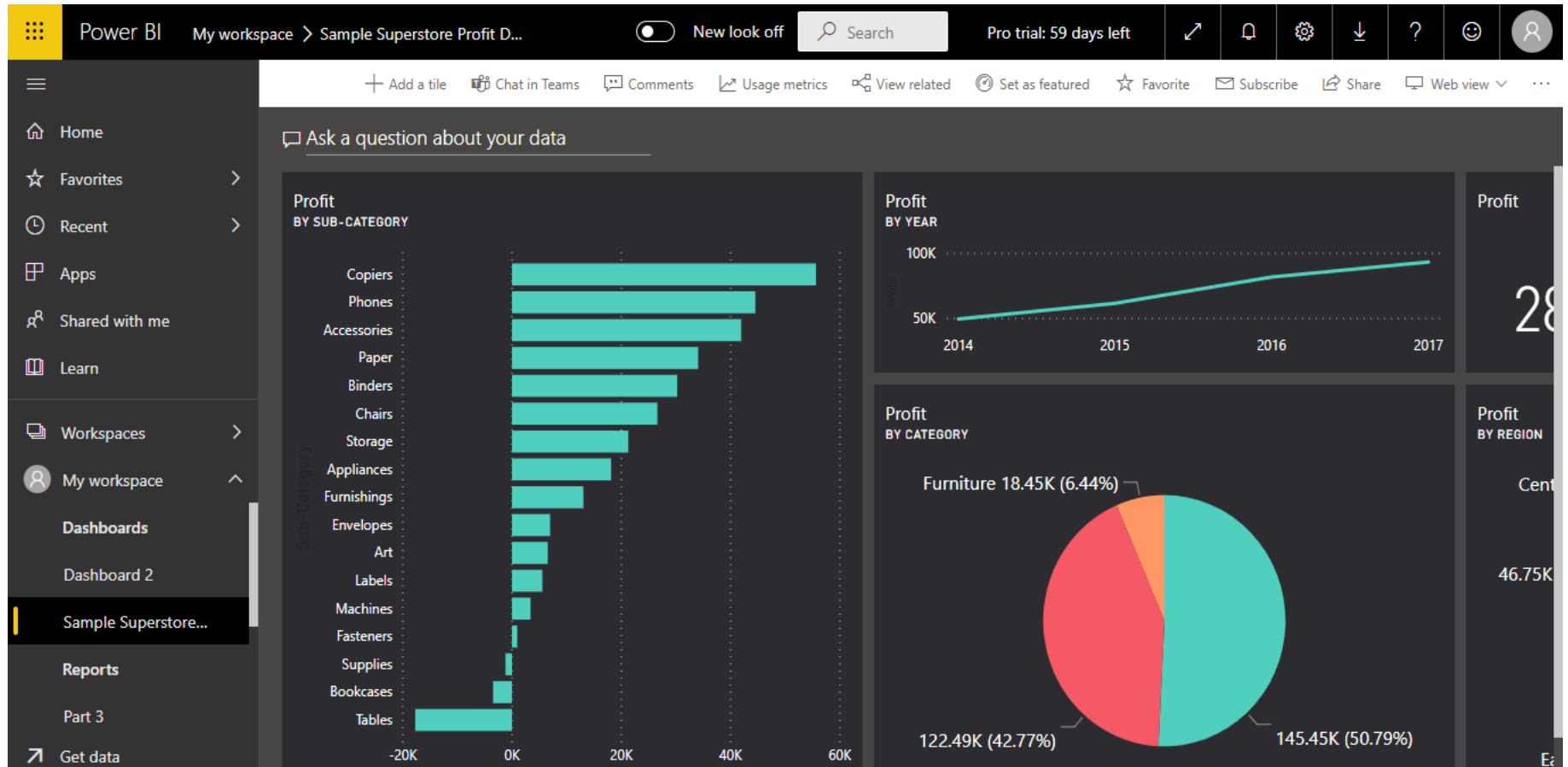
☒ Maine

☒ Maryland

Dashboard can also be created through My workplace.



Dashboard in Power BI



PowerBI Dashboard are not interactive by default. To make the dashboard interactive you need to pin the live page.

These are actually useful if you want to see the static view.



Dashboard in Power BI

- Power Bi dashboards are not interactive by default.
- To make the dashboard interactive you need to pin the live page.
- In the real time scenario Reports are majorly used.
- These are actually useful if you want to see the static view.

The screenshot shows the Power BI interface with a report titled 'Part 3 PAGE 1' in the background. The report contains a 'Super Store Profit Summary' dashboard with various charts and tables. A 'Pin to dashboard' dialog box is open in the foreground, allowing the user to pin the current report to an existing dashboard or create a new one. The dialog box includes a preview of the report, a selection of existing dashboards (currently showing 'SuperStore DB2'), and a 'Pin live' button.

Power BI Take a tour, and we'll show you how to get around.

Pin to dashboard

Select an existing dashboard or create a new one.

Where would you like to pin to?

- ☒ Existing dashboard
- ☐ New dashboard

Select existing dashboard

SuperStore DB2

i Pin live page enables changes to reports to appear in the dashboard tile when the page is refreshed.

Pin live Cancel

Preview: Last saved state

Part 3
PAGE 1

Super Store Profit Summary

Metric	Value
Total Sales	2.30M
Profit	286.40K
Quantity	38K
Revenue	1.54K

by Category

Category	Value
Technology	145.45K (50.7...)

by Segment

Segment	Value
Consumer	134.12K (46.8...)

by Region

Region	Value
West	108.42K (37.8...)



Refreshing Data in Power BI

To refresh the data you need to go to : My workspace -> Datasets -> Refresh

General Alerts Subscriptions Dashboards **Datasets** Workbooks

Settings for Part 3

Part 3

Refresh failed due to gateway configuration issues.

This dataset requires a properly configured gateway in order to refresh.

If you're using personal mode, please make sure your gateway is online.

If you're using enterprise mode, please make sure you've added the following data sources in the [Gateway Management Portal](#)

- File { path : "D:\SAS& SQLClasses\PBI DATA\orders.xls" }

Please try again later or contact support. If you contact support, please provide these details.
[Show technical details](#)

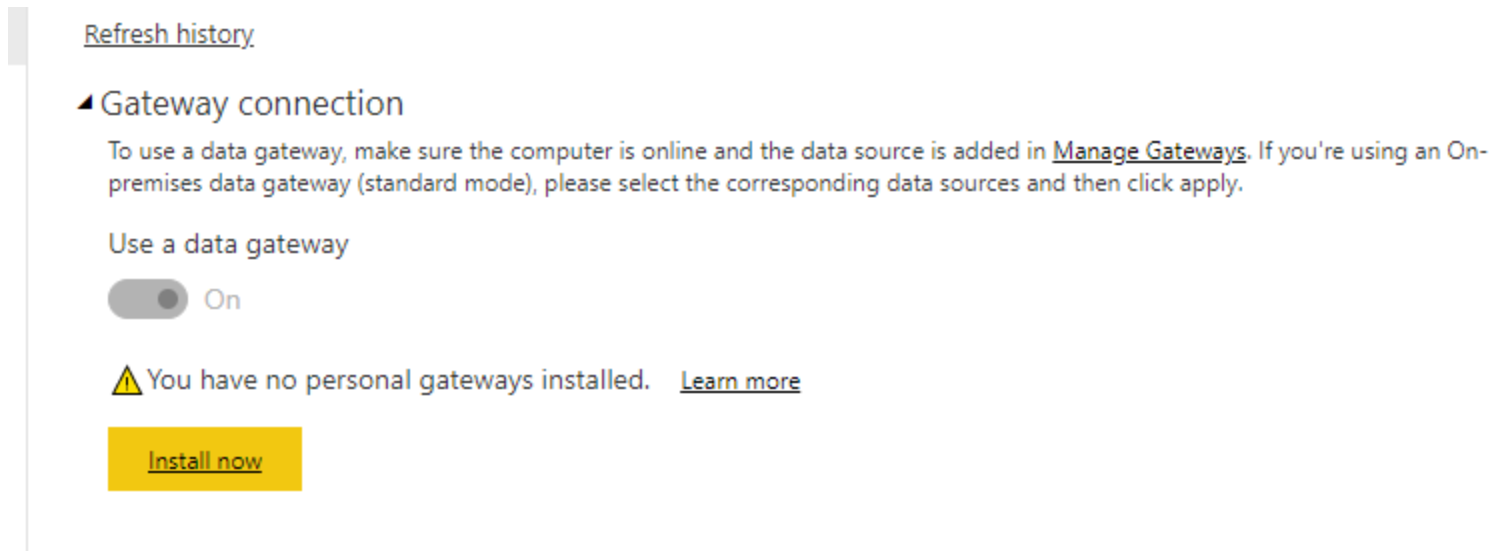
[Get help](#) [Copy](#)

Close



Refreshing Data in Power BI

The Refresh failed message is displayed as the Data Gateway is not configured. To resolve this : Download & Install Data Gateway.

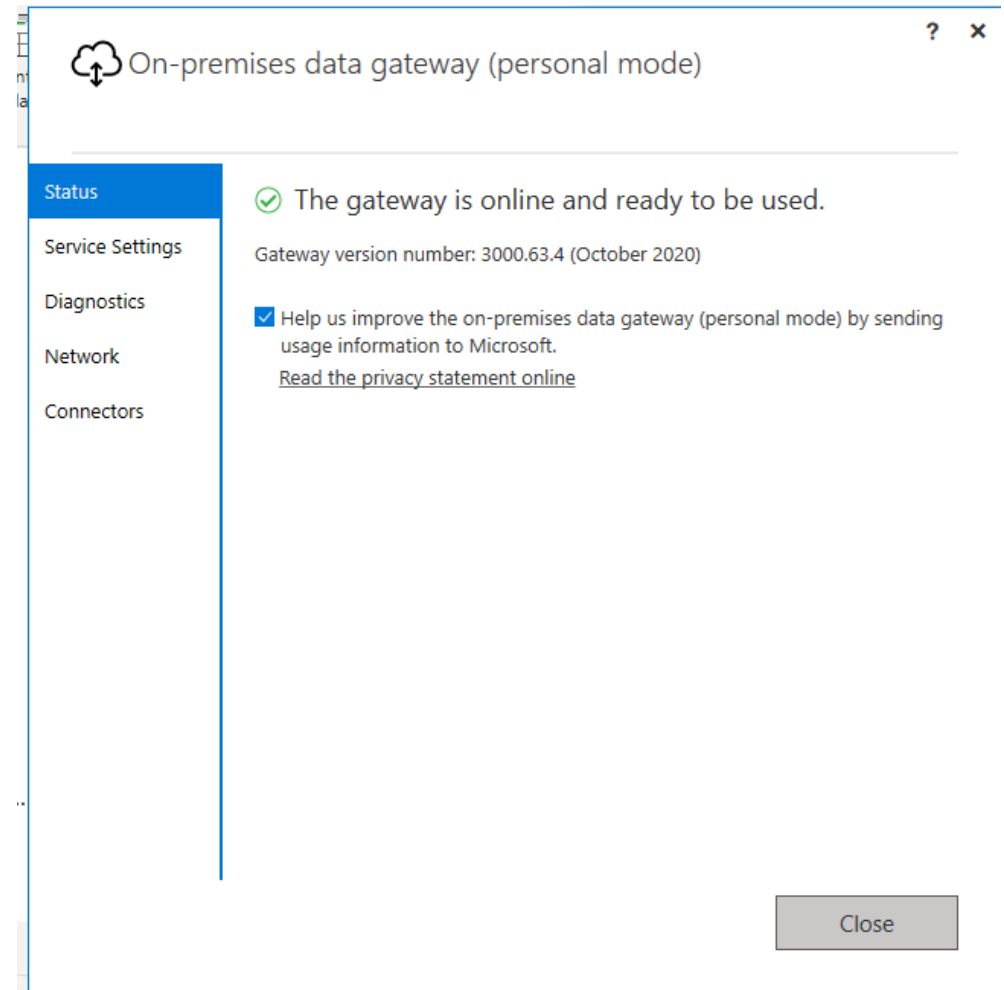


- Refresh the dataset
- Check for Username & password under
My workspace -> Datasets -> Settings -> Data Source Credentials
- Scheduled refresh (8 Schedules in Pro & 48 in Premium Account)



Refreshing Data in Power BI

Once the Gateway is installed and configured successfully, below confirmation will be displayed.



Refreshing Data in Power BI

Now try to refresh the Dataset. You may be prompted with the below message.

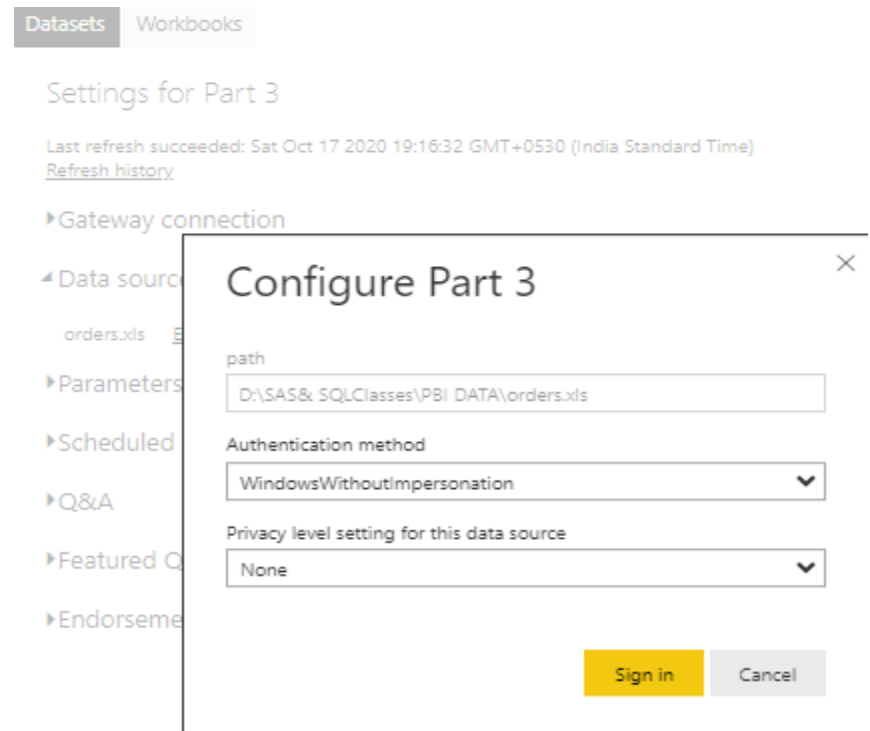
Can't refresh your data

The credentials you provided for the data source are invalid. Please check the credentials for all the data sources. Please try again later or contact support. If you contact support, please provide these details.

[Show technical details](#)

[Get help](#) [Copy](#)

To resolve this you need to specify the Data source credentials



The screenshot shows the 'Configure Part 3' dialog box in Power BI. The dialog has a close button (X) in the top right corner. It contains the following fields and options:

- path:** A text box containing 'D:\SAS& SQLClasses\Power BI DATA\orders.xls'.
- Authentication method:** A dropdown menu with 'WindowsWithoutImpersonation' selected.
- Privacy level setting for this data source:** A dropdown menu with 'None' selected.
- Buttons:** 'Sign in' (yellow) and 'Cancel' (grey) buttons at the bottom right.

In the background, the 'Datasets' tab is selected, showing 'Settings for Part 3'. It includes a status message: 'Last refresh succeeded: Sat Oct 17 2020 19:16:32 GMT+0530 (India Standard Time)' and a link to 'Refresh history'. A list of datasets is visible, with 'orders.xls' selected.



Scheduled Refresh in Power BI

You can automate the refresh by scheduling a refresh.

Turn on the Scheduled Refresh

Specify the frequency (Daily / Weekly)

Set the time

Specify a refresh failure email recipient

Apply

Scheduled refresh

Keep your data up to date

☒ On

Refresh frequency Daily

Time zone (UTC+05:30) Chennai, Kolkata, Mumbai, New Delhi

Time

7 30 PM ×

[Add another time](#)

☒ Send refresh failure notifications to the dataset owner

Email these users when the refresh fails

Apply

Discard



Note : Refresh can be done 8 times a day in Pro Account
In Premium account it can be done 48 times

ASSIGNMENT



Visualize the data in any meaningful way to help the institute to analyse the data.

Design a report for the planning data based on country, institute, department, year, quarter, and qualification.

KPI

- No of Students per Country
- No of Students per Institute
- No of Students per Department
- No of Students per Qualification
- Percentage of Withdrawn cases
- Time series analysis of active and withdrawn classes





Power Query

A ETL tool



Using Functions in Power Query

Power Query is a ETL tool (Extract Transform Load) which provide many function (Text Functions / Date Functions/ Number Functions)

Merge

Split

Change Case

Extract (left, right, substring, Delimiter)

The best part of Power Query is you do not have to write any formula.

To get the Power Query editor select the data source and click on Transform



Using Text Functions in Power Query

The screenshot displays the Power Query Editor interface. The 'Transform' tab is active, and the 'Text Column' group is highlighted with a red box. The 'Split Column' option is selected. The data table below shows columns for EID, NAME, FULL NAME, ADDRESS.1, ADDRESS.2, and CITY. The 'Query Settings' pane on the right shows the 'APPLIED STEPS' list, with 'Capitalized Each Word' selected.

EID	NAME	FULL NAME	ADDRESS.1	ADDRESS.2	CITY	
1	1001	RAMESH GUPTA	Ramesh Gupta	SECTOR 7	Rohini	Gurgaon
2	1002	Sandeep Sharma	Sandeep Sharma	SECTOR 2	PALAM	GURGAON
3	1003	Rajesh Sharma	Rajesh Sharma	Sector 11	Dwarka	Delhi
4	1004	Yogeshwar Sharma	Yogeshwar Sharma	Sector 11	Dwarka	Delhi
5	1005	Manoj Kumar	Manoj Kumar	B320	Janakpuri	Delhi
6	1006	Rohit Gupta	Rohit Gupta	A32/620 Main Road	Sector 56	Noida
7	1007	Kapil Sharma	Kapil Sharma	Jay Maa Apartments Flat 32	Sector 72	Gurgaon
8	1008	Archna Sharma	Archna Sharma	5C Karanpur	NP Road	Dehradun
9	1009	Ranjeeta Goyal	Ranjeeta Goyal	Flat No 6A	Rajpur Road	Dehradun
10	1010	Komal Singh	Komal Singh	Sector 64	Old Gurgaon Road	Gurgaon
11	1011	AMIT KAPOOR	Amit Kapoor	B2/45 DDA FLATS	JANAKPURI	DELHI
12	1012	MONIKA ARORA	Monika Arora	B1/45	JANAKPURI	DELHI
13	1013	ROHAN KUMAR	Rohan Kumar	B305	RAJOURI GARDEN	DELHI
14	1014	RAJAT KUMAR	Rajat Kumar	HNO-B205	SECTOR 62	NOIDA
15	1015	ABHISHEK SHARMA	Abhishek Sharma	C2-101	JANAKPURI	DELHI
16	1019	RAJAT KAPOOR	Rajat Kapoor	B501/1 POCKET 1	JANAKPURI	DELHI
17	1020	Rohan Kumar	Rohan Kumar	B-256	RAJOURIGARDEN	DELHI
18	1021	Lalit Sharma	Lalit Sharma	C2-401	Janak Puri	DELHI
19	1022	Monika Bajaj	Monika Bajaj	DLF	Phase 5	GURGAON
20	1023	Devender Kapoor	Devender Kapoor	E102/3 Pocket 1 Sector 3	Dwarka	Delhi
21	1024	Ravinder Kumar	Ravinder Kumar	B302-Jay Maa Apt	Dwarka	Delhi
22	1025	GAURAV GUPTA	Gaurav Gupta	D41-Jay Maa Apt	Dwarka	Delhi
23	1026	David	David	M121/4	Vatika Tower	Gurgaon
24	1027	KONIKA KAPOOR	Konika Kapoor	C2-431	SUPERTECH	NOIDA
25						

To get the Power Query editor select the data source and click on Transform

