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**Visualising the Customer/Orders/Products Data in PBI - Demonstration**

Page 1 is blank for trainer to work in. The next page is an example of the visuals, unformatted. The next page after that shows an example of a formatted revenue report and the last page, linked to the revenue report by a button is a formatted product report. All this can be published online on Power BI Service. *Note: In the morning (Day 4 – AM) you will use the formatted pages to demonstrate key dashboarding principles.*

# Visualization 1: Bar Chart - Total Orders by Country

1. **Navigate to Report View**:
   * Click on the Report icon on the left-hand side.
2. **Create a Bar Chart**:
   * Click on the Clustered bar chart icon in the Visualizations pane.
3. **Add Data to the Bar Chart**:
   * Select the Country field from the Customers table.
   * Select the Quantity field from the Orders table.
   * Ensure the Quantity is set to Sum.

# Visualization 2: Donut Chart - Product Distribution

1. **Create a Donut Chart**:
   * Click on the Donut chart icon in the Visualizations pane.
2. **Add Data to the Donut Chart**:
   * Select the ProductName field from the Products table.
   * Select the Quantity field from the Orders table.
   * Ensure the Quantity is set to Sum.

# Visualization 3: Line Chart - Orders Over Time

1. **Create a Line Chart**:
   * Click on the Line chart icon in the Visualizations pane.
2. **Add Data to the Line Chart**:
   * Select the OrderDate field from the Orders table.
   * Select the Quantity field from the Orders table.
   * Ensure the Quantity is set to Sum.
   * Change the date aggregation to show months or days as needed.

# Visualization 4: Map - Revenue by Country

1. **Create a Map Visualization**:
   * Click on the Map icon in the Visualizations pane.
2. **Add Data to the Map**:
   * Drag the Country field from the Customers table to the Location field well.
   * Drag the Quantity field from the Orders table to the Size field well.

For better representation, create a calculated field for revenue (Quantity \* Price).

1. **Create Calculated Column**:
   * Switch to the Data view.
   * Select the Orders table.
   * Click on Table Tools > New Column.
   * Enter the following formula, Revenue = Orders[Quantity] \* RELATED(Products[Price]).
2. **Use Revenue Column in Visualisations.**
   * Go to the Report view.
   * Select the Line Chart.
   * Uncheck quantity from the **Orders Table** in the **Data pane** and select the newly created Revenue column instead to show this in your visualization.
   * Repeat for the bar chart and map.

# Visualization 5: Table - Detailed Order Information

1. **Create a Table Visualization**:
   * Click on the Table icon in the Visualizations pane.
2. **Add Data to the Table**:
   * Drag fields such as OrderID, CustomerName, ProductName, Quantity, OrderDate, and Revenue to the Values field well.

# Visualisation 6: Card - Total Revenue

1. **Create a Card Visualization**:
   * Click on the Card icon in the Visualizations pane.
2. **Add Data to the Card**:
   * Select the Revenue field (calculated as described in the map visualization) in the Orders table of the data pane.
3. Under the Add Data to Your Visual section of the Visualisations Pane (this is the top left icon), Double Click Fields to change this from Sum of Revenue to read Total Revenue.

# Visualisation 7: Slicers

1. Demonstrate how to add slicers to filter data on the report page.
2. Click on the Slicer icon in the Visualisations pane and add fields such as Country, ProductName, or OrderDate.

# Show how the Visuals Interact with Each Other:

1. Demonstrate how the visuals interact with each other, filtering the visuals when you click on part of one visual to show just the data relevant to that area. E.g. if you click on data for March in the line chart then all the charts will only show data for March.

# Formatting:

1. Show how to format visualizations for better readability (e.g., changing titles, colors, fonts, adding data labels, removing titles from axes when repetitious, etc.).
2. Use the Format Visual section of the Visualisations pane to adjust these settings, looking at setting options in both general and visual tabs of pane.