

Finance Report Steps

1 – Download PowerBI:


Link: <https://www.microsoft.com/fr-fr/download/details.aspx?id=58494>

Choisissez le téléchargement voulu

<input type="checkbox"/> Nom du fichier	Taille
<input type="checkbox"/> PBIDesktopSetup.exe	446.4 MB
<input checked="" type="checkbox"/> PBIDesktopSetup_x64.exe	489.0 MB

[Télécharger](#)

Taille totale : 489.0 MB



Power BI Desktop

App

- **Then login with your academic email for free license**

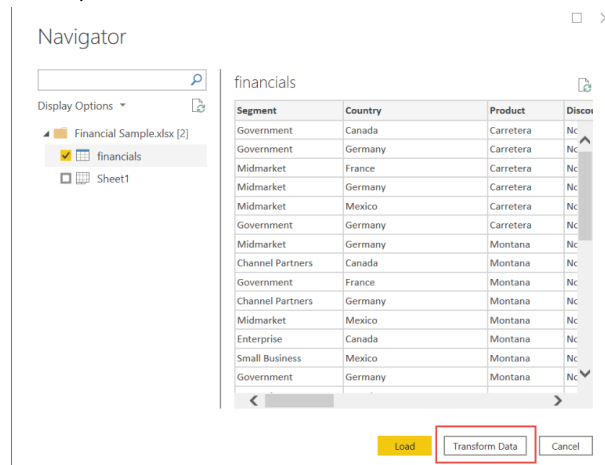
2 – Download the Database:

Microsoft Excel										Microsoft Excel - 2010										Microsoft Excel - 2010									
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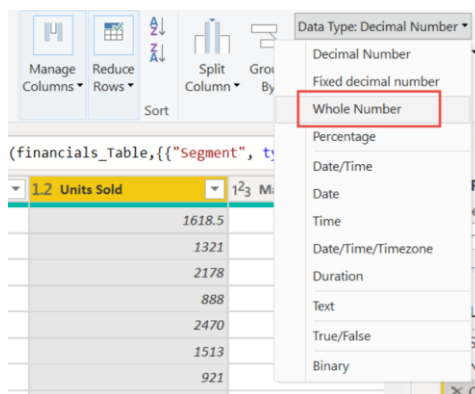
3 – Load & Prepare the Data:

Import it as Excel

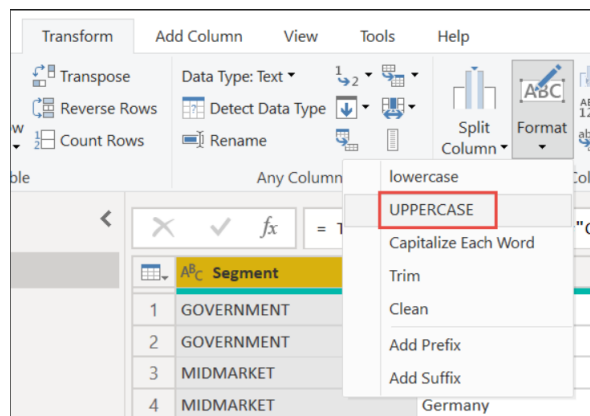
3-1 - Select The Financial table, and choose Transform Data:



Select the Units Sold column. On the Transform tab, select Data Type, then select Whole Number. Choose Replace current to change the column type.



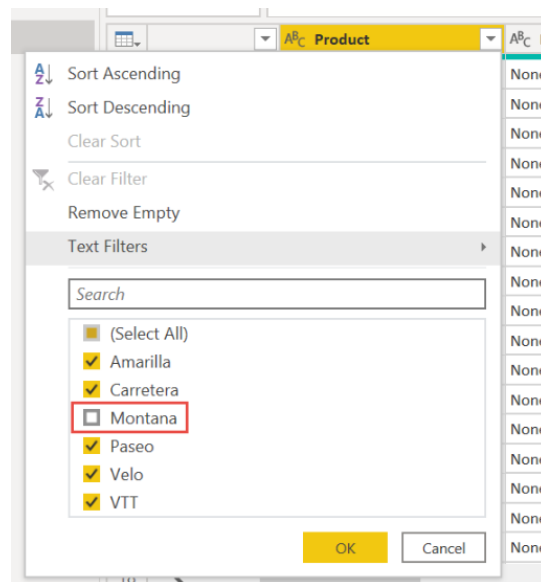
Select the Segment column. We want to make the segments easier to see in the chart later, so let's format the Segment column. On the Transform tab, select Format, then select UPPERCASE.



Let's shorten the column name from Month Name to just Month. Double-click the Month Name column and rename to just Month.

	Month Name	
1	January	
1	January	
6	June	
6	June	

In the Product column, select the dropdown and clear the box next to Montana.



Extra credit: Write two expressions in DAX:

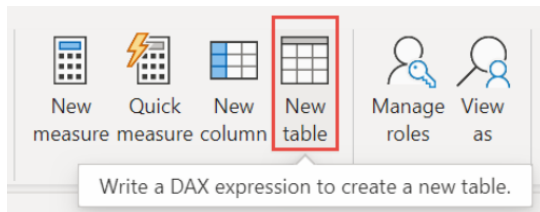
1 – New measure



Type this command : Total Units Sold = SUM(financials[Units Sold])

Then commit it.

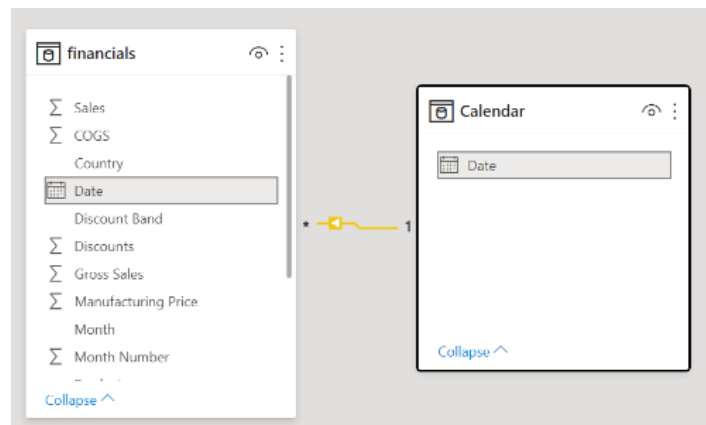
Create a new table:



Then type this:

```
Calendar = CALENDAR (DATE (2013,01,01),Date(2014,12,31))
```

Drag the Date field from the financials table to the Date field in the Calendar table to join the tables and create a relationship between them.



New relationship

Select tables and columns that are related.

From table

financials

Sales	COGS	Country	Date	Discount Band	Discounts	Gross Sale
529550	393380	Germany	Monday, Dec...	None	0	529550
352100	261560	Germany	Sunday, June ...	None	0	352100
603750	448500	Canada	Friday, Nove...	None	0	603750

To table

Calendar

Date
1/1/2013 12:0...
1/2/2013 12:0...
1/3/2013 12:0...

Cardinality

Many to one (*:1)

Cross-filter direction

Single

☒ Make this relationship active

☐ Apply security filter in both directions

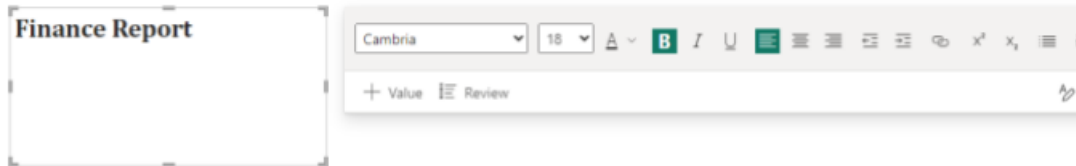
☐ Assume referential integrity

Save

Cancel

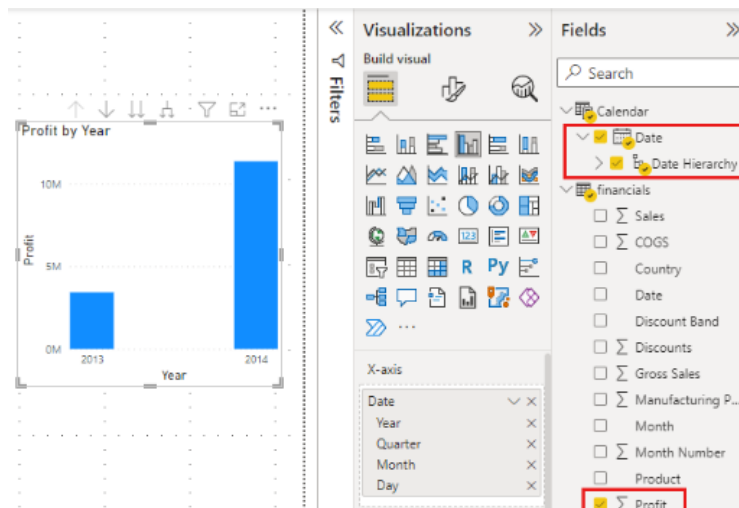
4 - Build your report:

Add Title:



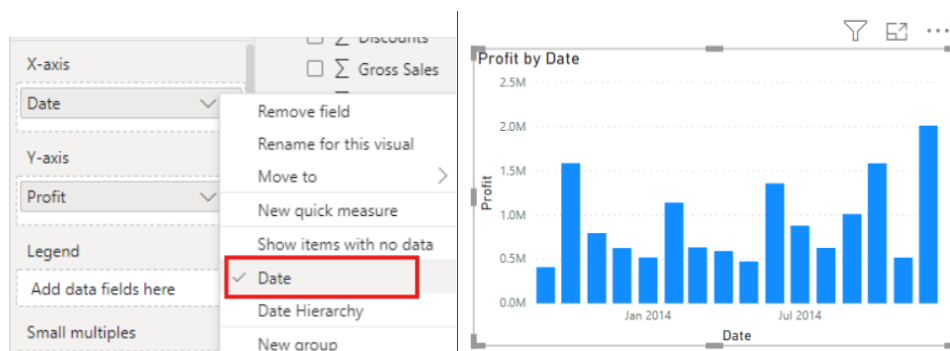
For Example

Profit by Date

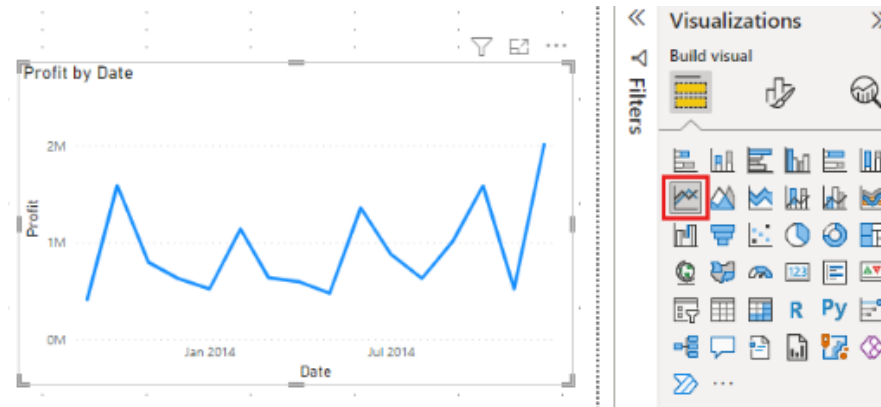


Change from Date Hierarchy to Date

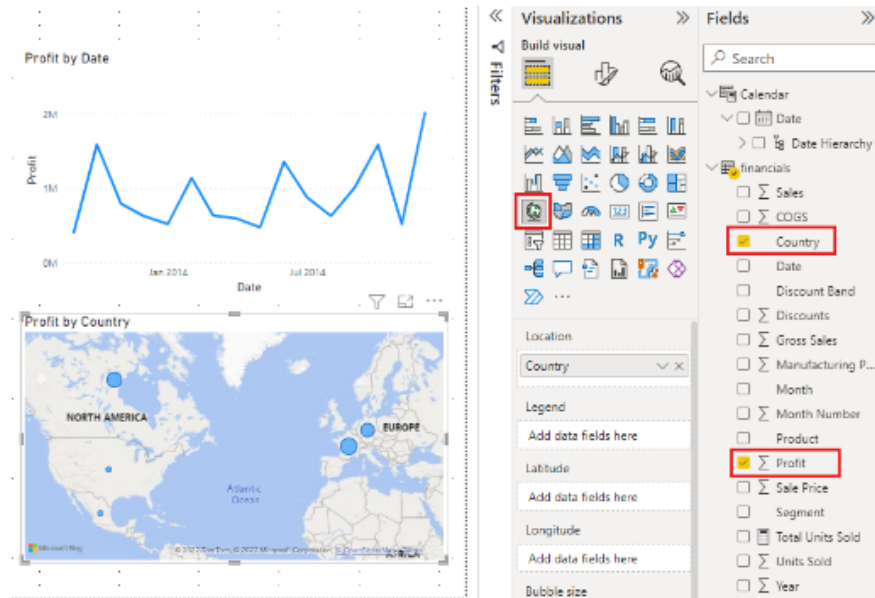
The updated columns



In the Visualizations pane, change the visualization type to Line chart.



Profit by Country/Region



Report

