Instructions to Extract Transform and Build Charts using POWER BI
****

Open Power BI.

1) Get Data from Ribbon -> Import Text/CSV -> Select File -> Invoicedata.txt

2) Click on Transform Data => which will open the Power Query Editor

a) Here you can make changes to data and manipulate columns

b) To view statistics of your data use the view options and select Column
Distribution / Column Profile / Column Quality

3) Let us now Merge 3 columns - Day, month and year and make it a Single new column
Date

a) Select the 3 columns in the above order (by pressing the CTRL key)
b) Right click and Merge columns, choose custom seperator and specify / and give a
new name 'Date' for the column
c) Change the data type of new column to date

4) Change the data type of Sales column - Click on the column and change the type
fixed decimal nbr

5) Explain Applied Steps pane - Source, promoted headers ....

6) Open the other file via - Open New Query (Right click on the query pane) ->
Excel Workbook -> CustomerMaster.xlsx

7) Load the CustomMaster.xlsx file and choose MasterCustomer table by Clicking on
the Check box => Click Ok

7a) Now the table will be loaded a new Query builder window.

8) Now select and split the columns CityProvince -> Select the col and Split column
by delimiter, use (put space in front of (and select leftmost delimiter => Click
OK

8a) Now the column name of CityProvince has changed to CityProvince.1 and we have
also created a new column CityProvince.2

9) Rename the columns by by double clicking the column => CityProvince.1 as City &
CityProvince.2 as Providence

9a) Still we have an extra) in the Province column data => we need to fix that

10) Select the Province column and right click and select -> Replace values =>)
with a space and click OK => this removes the)

11) Now goto Home -> select Close and Apply to apply the data transformations - > this will open the report pane and show the tables on the right ==> this will load the transformed data.

12) Now click on Model Pane (left side last icon) to explore the relationships - see the automatic relationship created based on the Customer id.

12a) The InvoiceData and MasterCustomer will show under Fields on the extreme right of the interface window

13) Now go to the report Pane and click on the (Left side top icon)

Select Clustered Column Chart =>then

Invoice data ->   Select Column => Sales
Master Customer -> Select Customer => Customer Category name

Click outside the New report created above and

Now add Slicer -> Click Date => Date Hierarchy => select Year from date hierarchy (date hierarchy has been automatically created by Power BI when we merged the date column and made it a Date field).

14) Insert table
Select Month from -> Date Hierarchy
Select Sales -> Invoice Data

Select Quick measure from Menu ribbon
Select Time intelligence -> Year-to-date total and then select Sales on to base value & date from merged column -> this creates a new column Sales YTD
Now drag the Sales YTD to the table on the report pane.

Do the same for Sales YoY%
Select Time intelligence -> Year-over-year change and then select Sales on to base value & date from merged column -> this creates a new column Sales YOY%, drop it into the table

15) Now Insert Filled map => by clicking on => Filled Map from Visualizations
Select Sales from Invoice data
Select Province from Customer master

16) Now insert Line chart => by clicking on => Line Chart from Visualizations
Select fields ==> Quantity & month - date hierarchy from Invoice data.

17) Add a text box and put the title

18) Click on add KPI and select Quantity & year -> Save and publish the dashboard