

Step 1: Get data

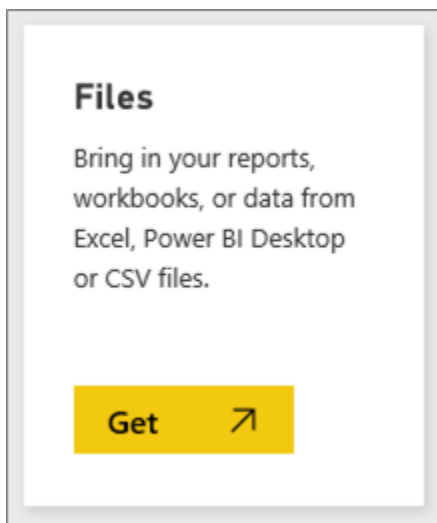
Often when you want to create a Power BI report, you start in Power BI Desktop. This time, we're going to start from scratch creating a report in the Power BI service.

In this tutorial, we get data from a CSV file. Want to follow along? [Download the Financial Sample CSV file](#).

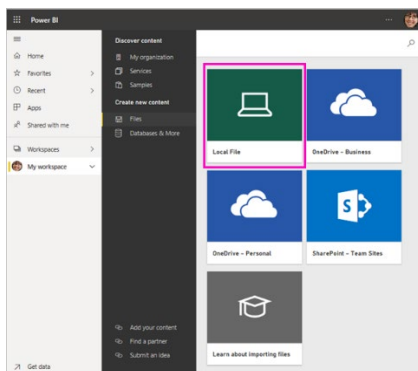
1. [Sign in to Power BI](#). Don't have an account? No worries, you can sign up for a free trial.
2. Power BI opens in your browser. Select **Get data** at the bottom of the nav pane.

The **Get Data** page opens.

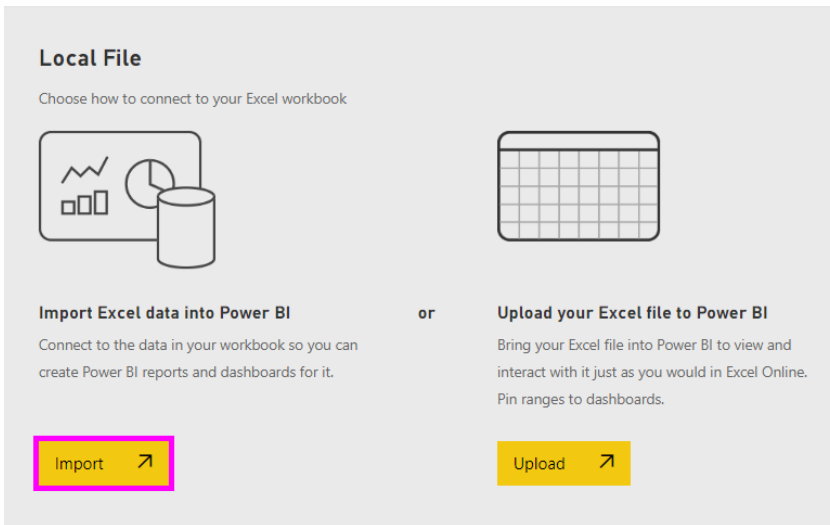
3. Under the **Create new content** section, select **Files**.



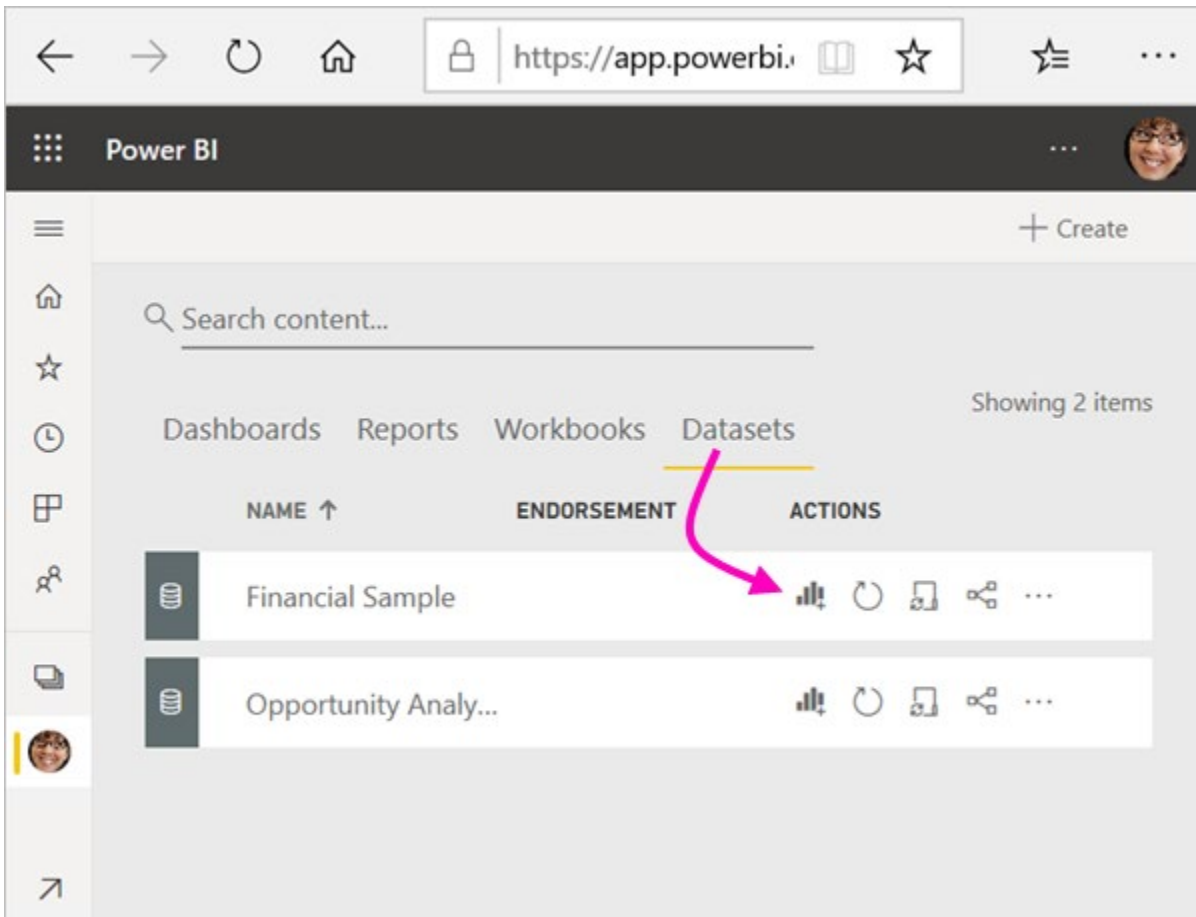
4. Select **Local file**.



5. Browse to the file on your computer, and choose **Open**.
6. For this tutorial, we select **Import** to add the Excel file as a dataset, which we can then use to create reports and dashboards. If you select **Upload**, the entire Excel workbook is uploaded to Power BI, where you can open and edit it in Excel online.



- When your dataset is ready, select **Datasets**, then select **Create report** next to the dataset **Financial sample** to open the report editor.

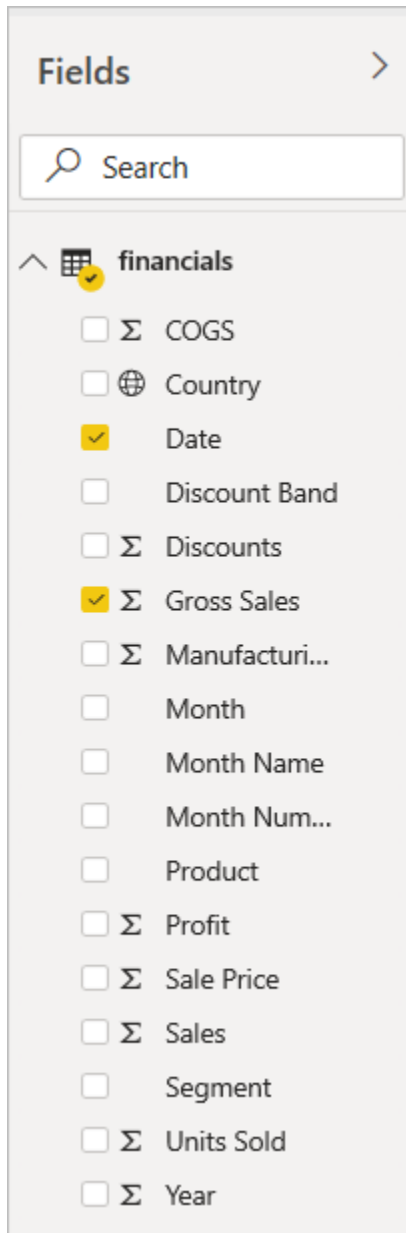


- Notice there's an option for **Reading view** on the top nav pane. Because you have this option, that means you're currently in Editing view.

Step 2: Create a chart in a report

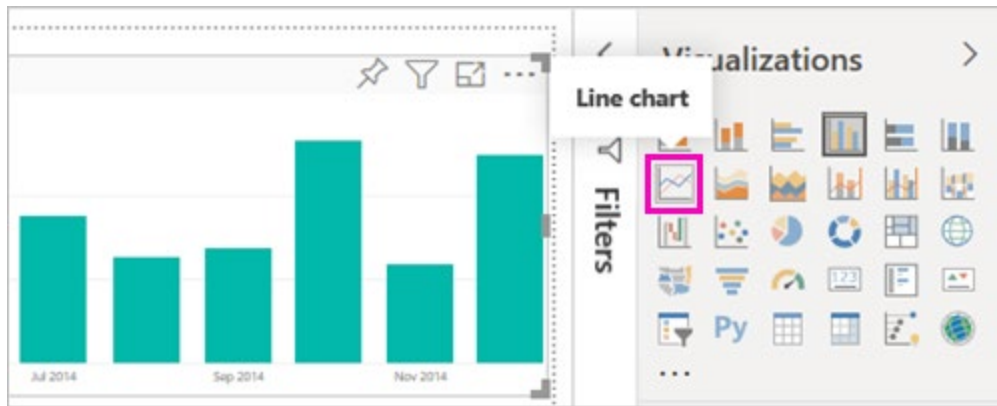
Now that you've connected to data, start exploring. When you've found something interesting, you can create a dashboard to monitor it and see how it changes over time. Let's see how that works.

1. In the report editor, we start in the **Fields** pane on the right side of the page to build a visualization. Select the **Gross Sales** and **Date** checkboxes.

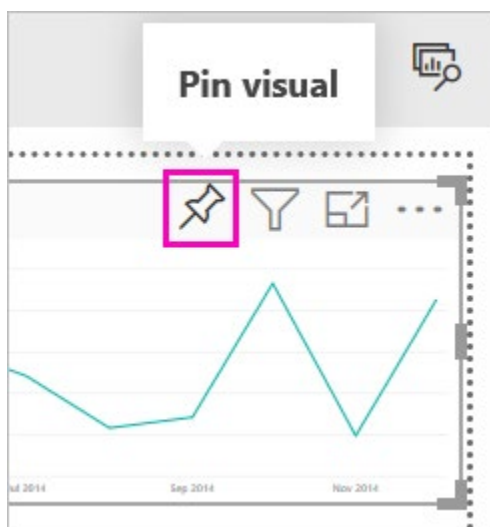


Power BI analyzes the data and creates a visualization. If you selected **Date** first, you see a table. If you selected **Gross Sales** first, you see a column chart.

2. Switch to a different way of displaying your data. Let's see this data as a line chart. Select the line chart icon from the **Visualizations** pane.



3. This chart looks interesting, so let's *pin* it to a dashboard. Hover over the visualization and select the pin icon. When you pin this visualization, it's stored on your dashboard and kept up-to-date so you can track the latest value at a glance.

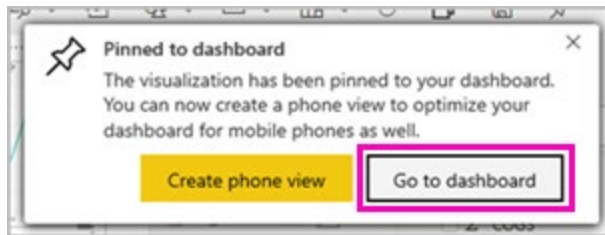


4. Because this report is new, you're prompted to save it before you can pin a visualization to a dashboard. Give your report a name (for example, *Sales over time*), and then select **Save**.
5. Select **New dashboard** and name it *Financial sample for tutorial*.

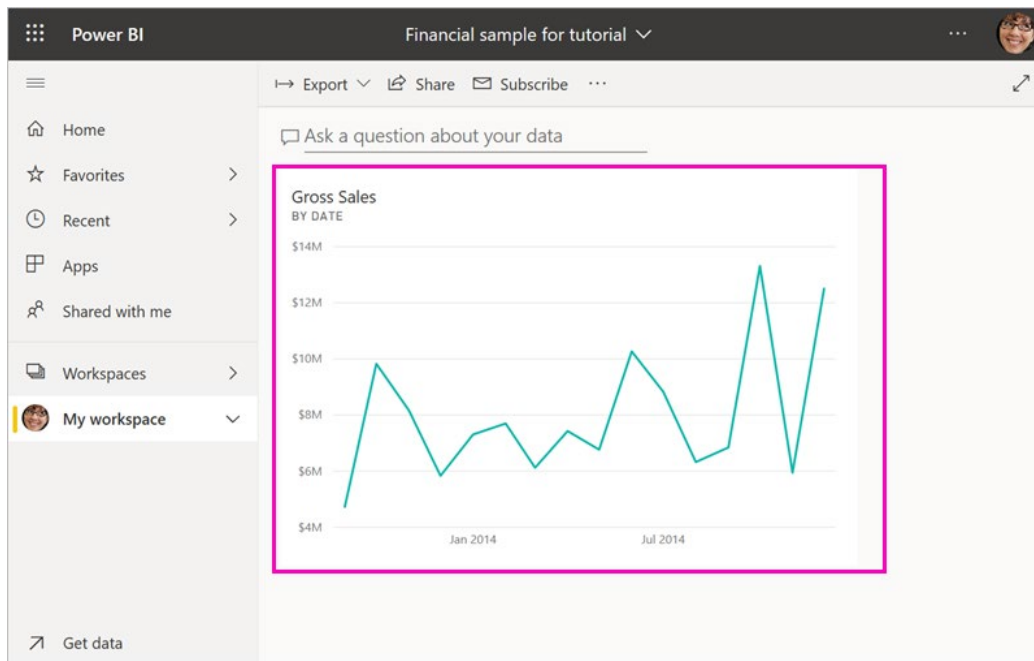
The screenshot shows a 'Pin to dashboard' dialog box. On the left, a preview of a line chart titled 'Gross Sales BY DATE' is shown, with data for January 2014 and July 2014. On the right, the dialog box contains the following text: 'Pin to dashboard', 'Select an existing dashboard or create a new one.', 'Where would you like to pin to?', and two radio buttons: 'Existing dashboard' and 'New dashboard'. The 'New dashboard' radio button is selected. Below the radio buttons, there is a text input field containing the text 'Financial sample for tutorial'. At the bottom right, there are two buttons: 'Pin' and 'Cancel'.

6. Select **Pin**.

A success message (near the top-right corner) lets you know the visualization was added as a tile to your dashboard.



7. Select **Go to dashboard** to see your new dashboard with the line chart that you pinned to it as a tile.



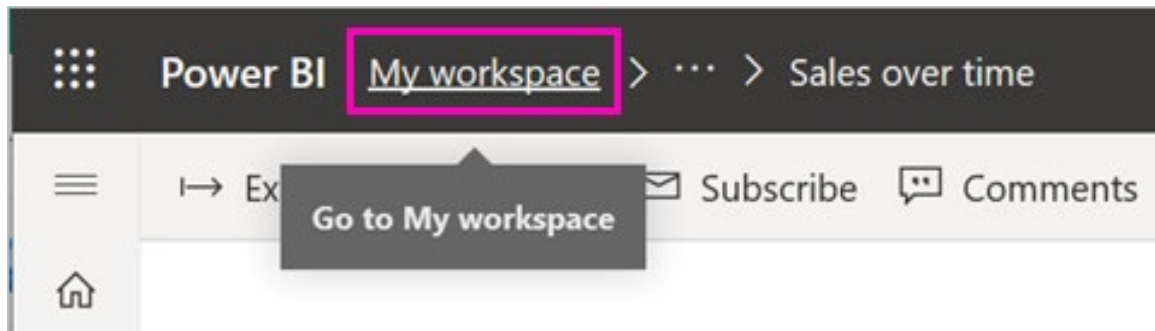
8. Select the new tile on your dashboard to return to the report. Power BI returns you to the report in Reading view.
9. To switch back to Editing view, select **More options** (...) in the top nav pane > **Edit**. Back in Editing view, you can continue to explore and pin tiles.



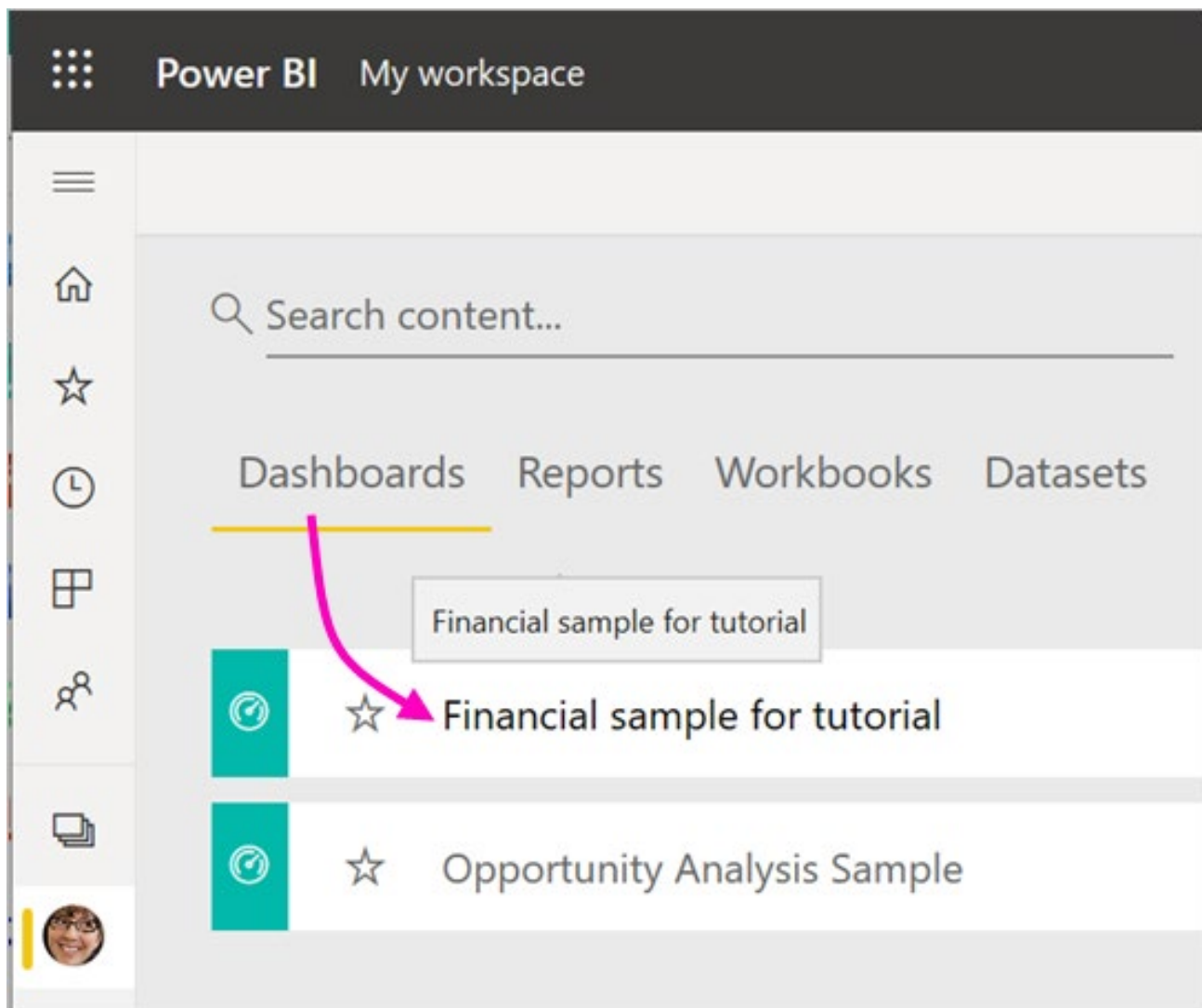
Step 3: Explore with Q&A

For a quick exploration of your data, try asking a question in the Q&A question box. Q&A creates natural-language queries about your data. In a dashboard, the Q&A box is at the top (**Ask a question about your data**). In a report, it's in the top nav pane (**Ask a question**).

1. To go back to the dashboard, select **My workspace** in the black **Power BI** bar.



2. On the **Dashboards** tab, select your dashboard.




3. Select **Ask a question about your data**. Q&A automatically offers a number of suggestions.

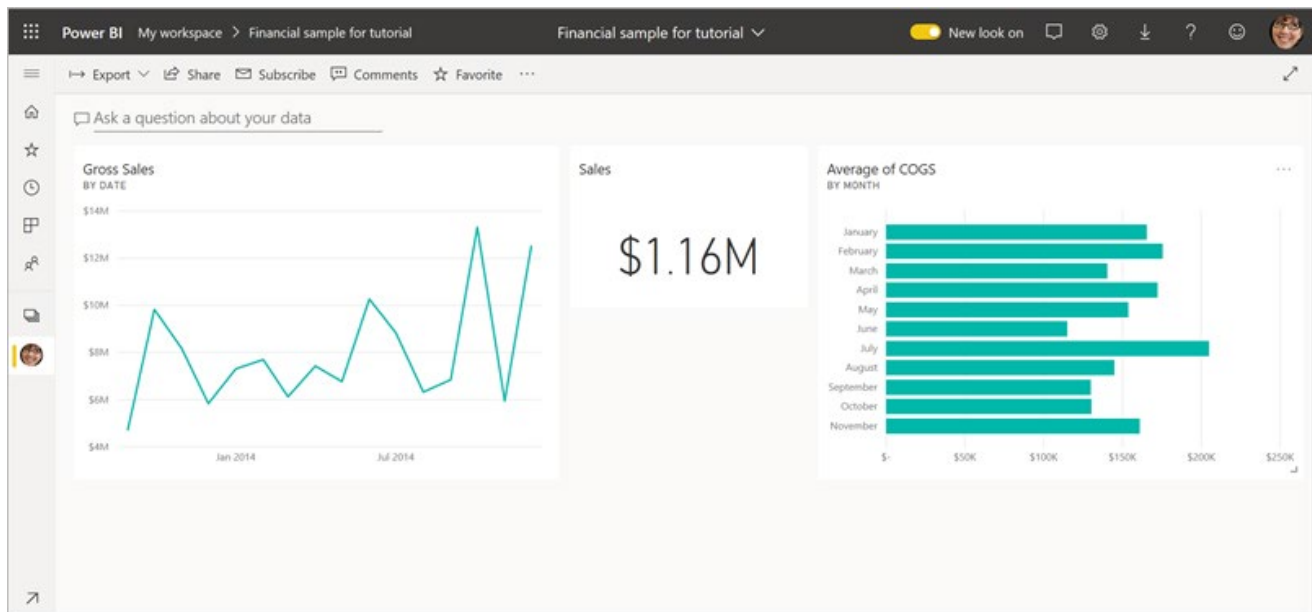
Note

If you don't see the suggestions, turn on **New Q&A experience**.

4. Some of the suggestions return a single value. For example, select **maximum sale**.

Q&A searches for an answer and presents it in the form of a *card* visualization.

5. Select the pin icon  to show this visualization on the Financial sample for tutorial dashboard.
6. Scroll down in the **Questions to get you started** list and select **average cog for each month**.
7. Pin the bar chart to the **Financial Sample for tutorial** dashboard, too.
8. Place the cursor after *by month* in the Q&A box and type *as line*. Select **line (Visualization Type)**.
9. Select **Exit Q&A** to return to your dashboard, where you see the new tiles you created.

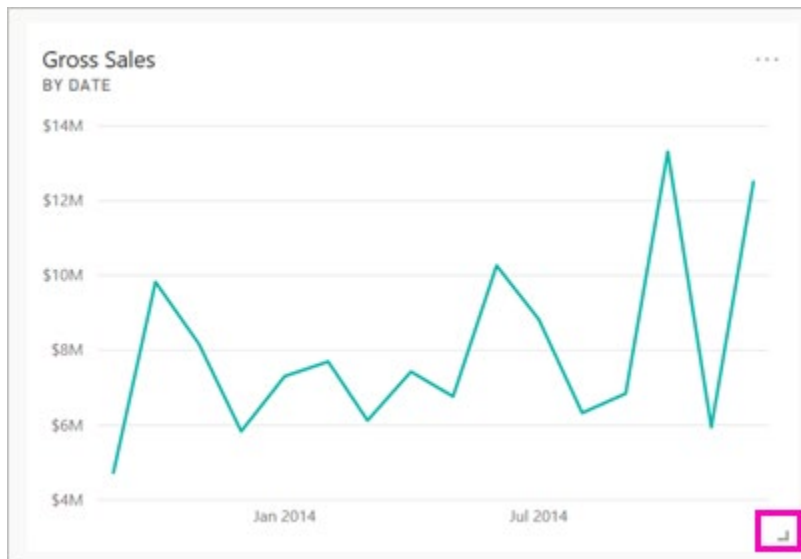


You see that even though you changed the chart to a line chart, the tile remained a bar chart because that's what it was when you pinned it.

Step 4: Reposition tiles

The dashboard is wide. We can rearrange the tiles to make better use of the dashboard space.

1. Drag the lower-right corner of the *Gross Sales* line chart tile upward, until it snaps at the same height as the Sales tile, then release it.

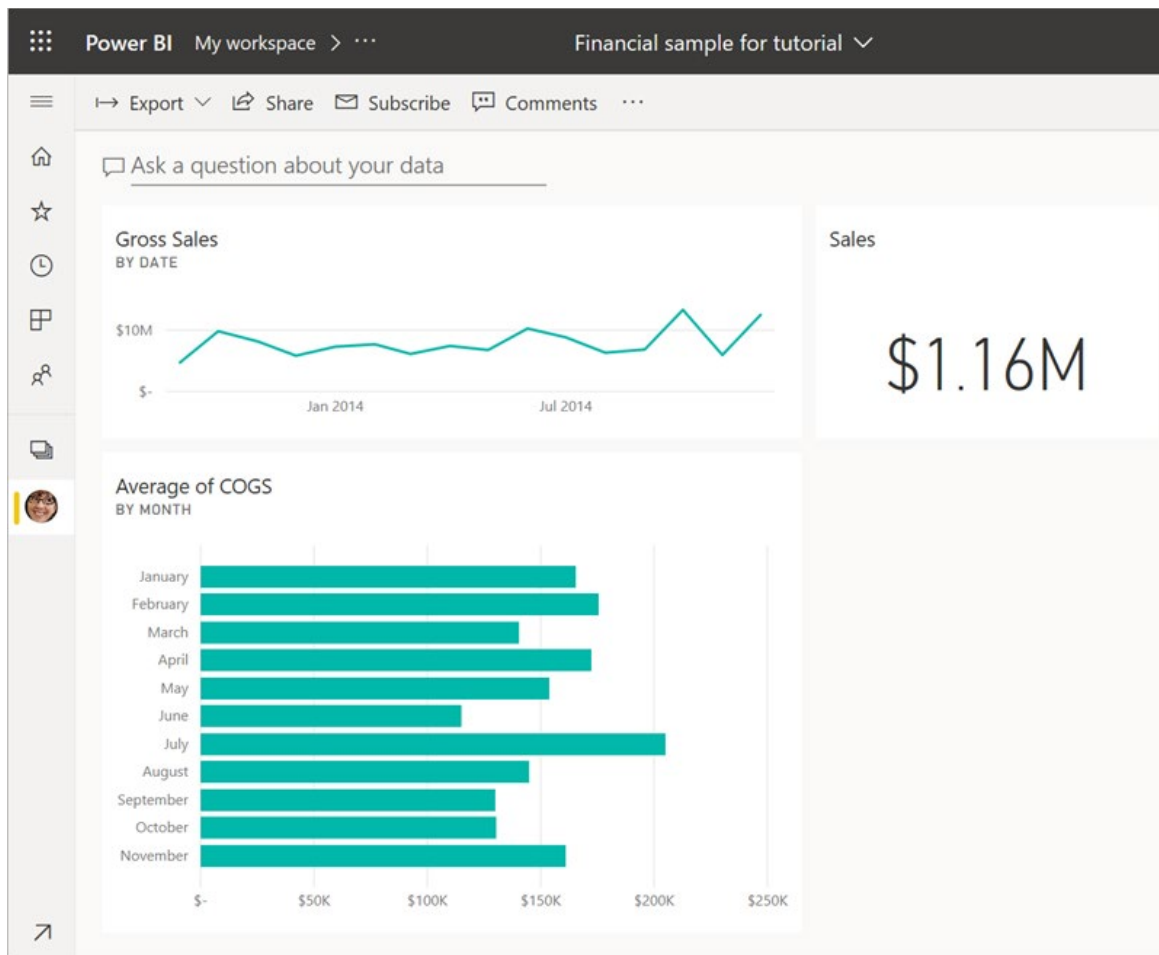


Now the two tiles are the same height.



2. Drag the *Average of COGS* bar chart tile until it fits under the *Gross Sales* line chart.

That looks better.



Step 5: Interact with tiles

Here's one last interaction to observe, before you start making your own dashboards and reports. Selecting the different tiles delivers different results.

1. First select the *Gross Sales* line chart tile you pinned from the report.

Power BI opens the report in Reading view.

2. Select the browser back button.
3. Now select the *Average of COGS* bar chart tile you created in Q&A.

Power BI doesn't open the report. Q&A opens instead, because you created this chart there.