



X



POWER BI DOMINATION

WORKSHOP

—

DAY 1 NOTES BY SKILL NATION



**Microsoft Certified
Trainer**



**Microsoft Certified
Expert**



**Google Certified
Data Analyst**



**Co-Founder & CEO
Skill Nation**

12,000+

Students trained in
Power BI Dashboards

1,70,000+

Students trained in
Data Analytical Tools
Like Tableau, Excel,
SQL, etc





Analyst at Google gets qualified for a promotion using the Masterclass !

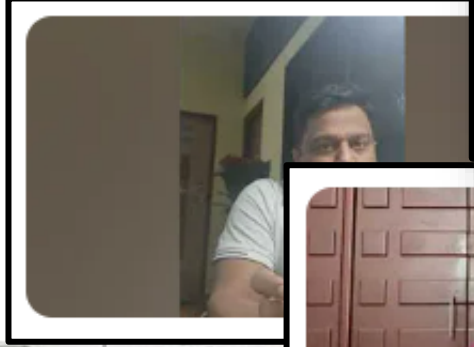


Job + Promotion

Masterclass B52 - Testimonial
views • 5 months ago
Masterclass B27 - Testimonial
views • 5 months ago



Capgemini program manager was able



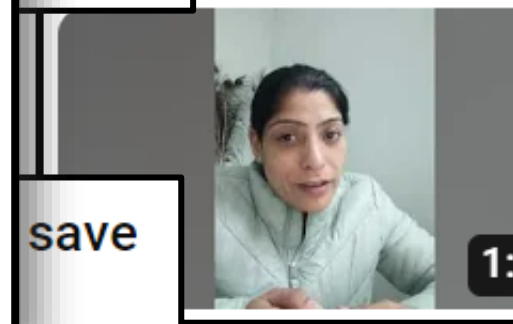
Jatan Shah

Reviews 299 • Excellent



4.7 ⓘ

Masterclass B83 - Testimonial
views • 5 months ago



save



Engineer in Accenture got an appraisal, promotion & salary hike of 30% using the Masterclass

Salary Hike



Important Meeting Alert!

Extract & present actionable insights for your company on Monday

As an employee of **SN Corporation,
You have an important meeting this Monday.**

Your promotion is 1 step away & this meeting can either get you a big raise & a bigger job title **OR keep you stuck in your current role for 2 more years.**

You need to impress everyone by...

- 1. Getting actionable insights**
- 2. Answers to complicated questions**
- 3. Be ready for any question you are going to be asked**
- 4. Present your company's performance in a stunning dashboard**

Power BI Interface - Explained

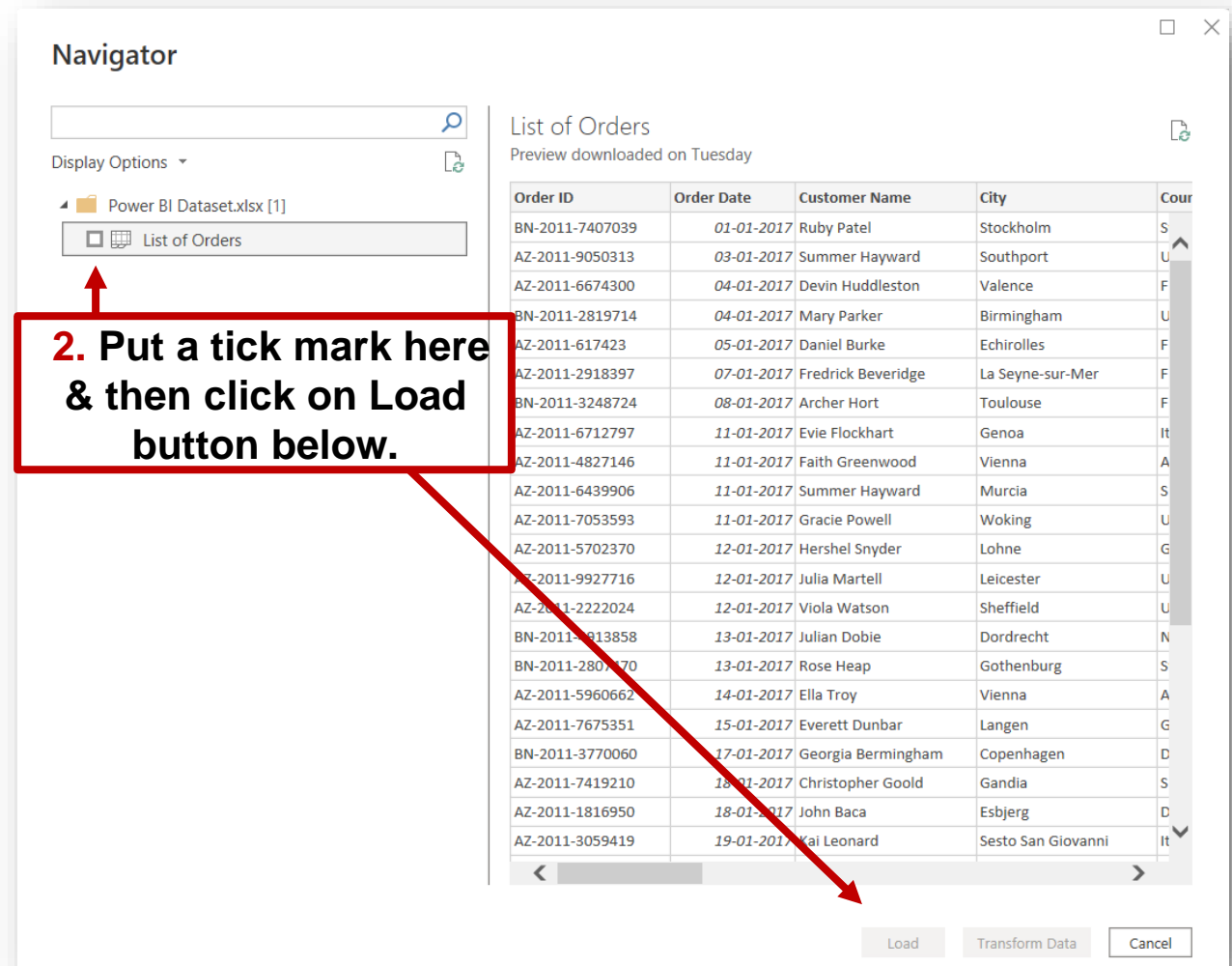
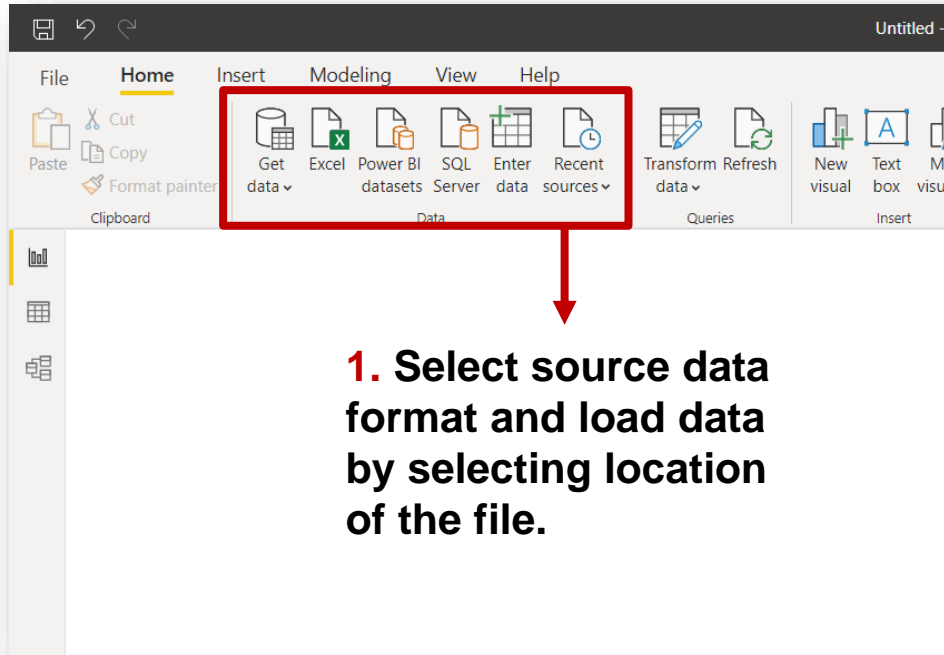
The screenshot shows the Power BI Desktop interface with several key components highlighted and labeled:

- Ribbon:** Located at the top, it contains tabs for File, Home, Insert, Modeling, View, and Help. The Home tab is currently selected, showing options like Paste, Cut, Copy, Format painter, and various data and visualization tools.
- Workspace | Canvas:** The central area where you build your report. It displays "Add data to your report" and "Once loaded, your data will appear in the Fields pane." Below this are buttons for "Import data from Excel", "Import data from SQL Server", "Paste data into a blank table", and "Try a sample dataset".
- Filters Pane:** Located on the left side of the right-hand pane, it helps you add filters to your visual. It includes a search bar and sections for "Filters on this page" and "Filters on all pages".
- Visuals Pane:** Located in the middle of the right-hand pane, it helps you add visuals to your dashboard & format it. It includes a search bar, a "Build visual" section with various chart and table icons, and sections for "Values", "Drill through", and "Keep all filters".
- Field Pane:** Located on the right side of the right-hand pane, it shows all fields from your data. It includes a search bar and a message: "You haven't loaded any data yet. [Get data](#)".
- Page Navigation:** At the bottom left, there is a "Page 1" button and a "+" button to add new pages.

What Page of Dashboard are you on?

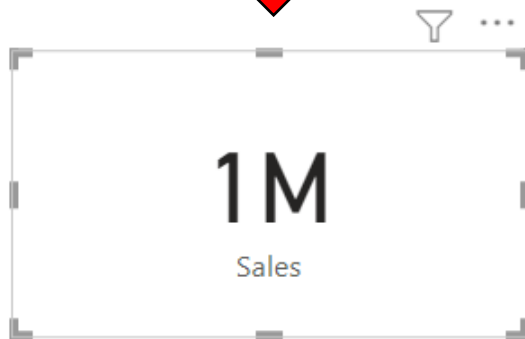
Helps you add visuals to your dashboard & format it.

Loading your data



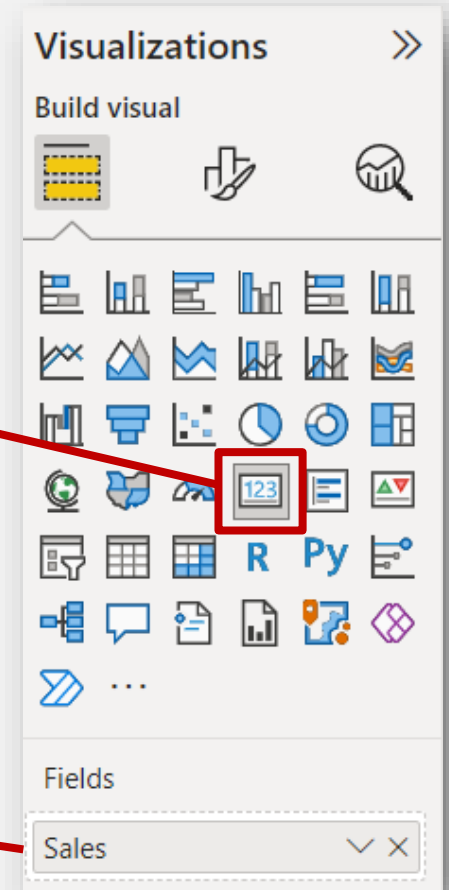
Creating a Card

Click on the card visual to add it on your canvas.
Once added, drag a numerical field you want to visualize in the fields box.



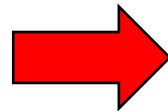
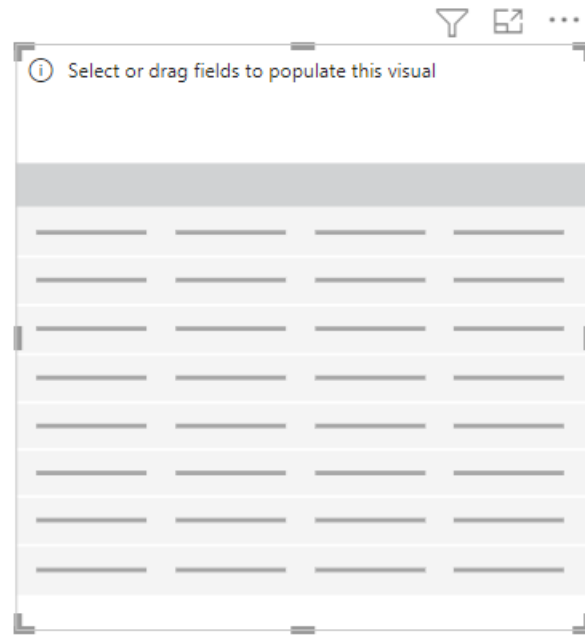
After adding Sales to card

Add numerical field in fields as shown below.



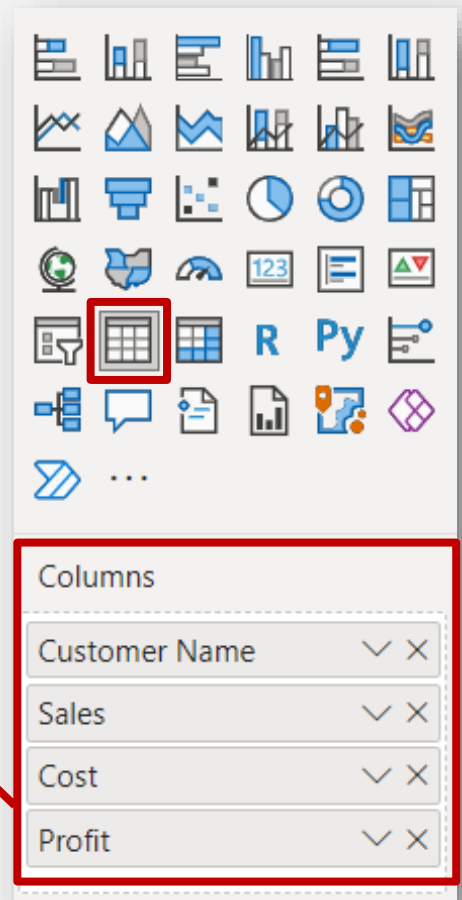
Creating a Table

Click on the table visual to add it on your canvas.
Once added, drag any field you want to visualize in the
columns box.



Customer Name	Sales	Cost	Profit
Aaron Bootman	1635	818	817
Aaron Cunningham	820	150	670
Aaron Davey	1862	1119	743
Aaron Macrossan	81	56	25
Abbie Perry	619	128	491
Abby Colebe	676	500	176
Abby Mei	1924	393	1531
Abby Muramats	1010	381	629
Abigail Humffray	744	461	283
Ada Dalton	773	565	208
Adam Bentley	3458	1807	1651
Adam Gibbs	815	625	190
Adam Harte	2540	1216	1324
Adam Peacock	589	492	97
Total	1267564	640597	626967

Add any field in
columns as
shown below.

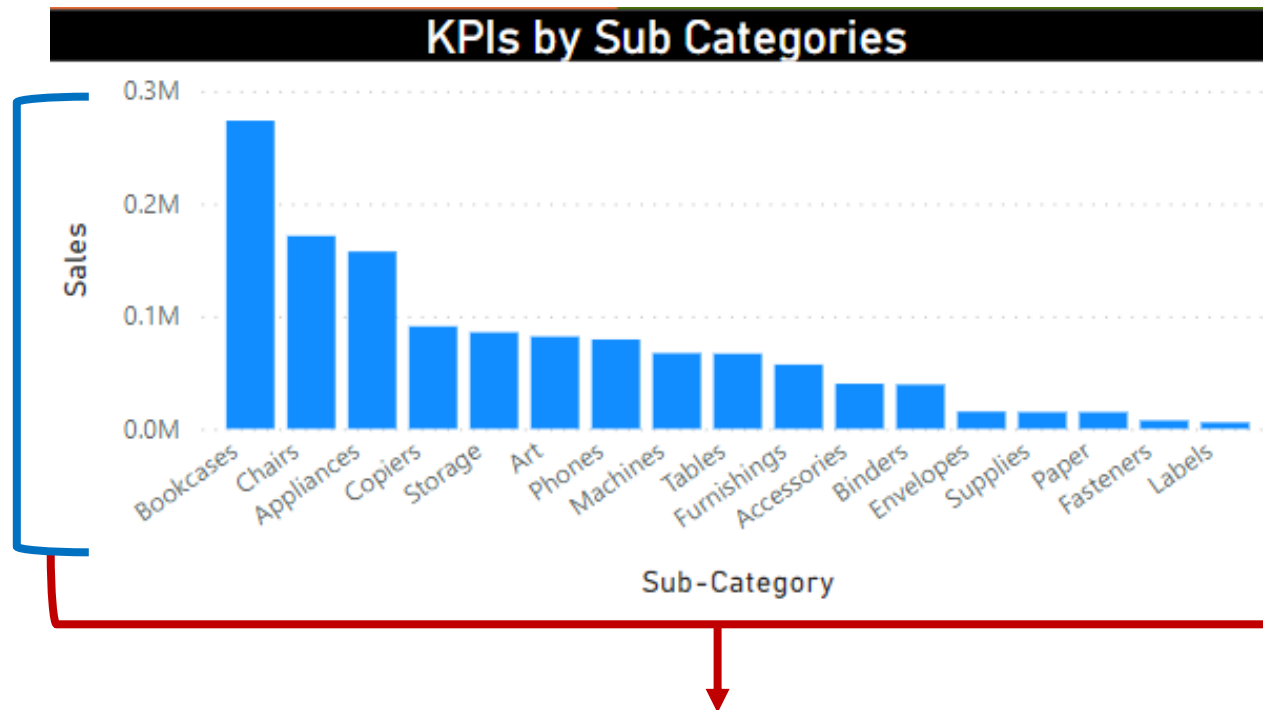
A screenshot of the Power BI interface showing the Visuals gallery and the Columns pane. In the Visuals gallery, the table icon is highlighted with a red box. A red arrow points from this icon to the Columns pane. The Columns pane is also highlighted with a red box and contains the following fields: Customer Name, Sales, Cost, and Profit. Each field has a dropdown arrow and a close button (X) to its right.

Columns	
Customer Name	▼ ×
Sales	▼ ×
Cost	▼ ×
Profit	▼ ×

Creating a Column Chart – X-axis & Y-axis

**Sales is
your Y-axis**

Adding numerical
metric as Y-axis helps
the user understand
the extent of it by the
column height.



Sub-Category is your X-axis

Add the text based field that you want to see in the X-axis. As we are using a column chart, numerical metrics like sales, profit etc will become Y-axis as we want the column HEIGHT to show the extent of that metric.

Add fields in X & Y Axis as shown below.

The configuration panel shows the following settings:

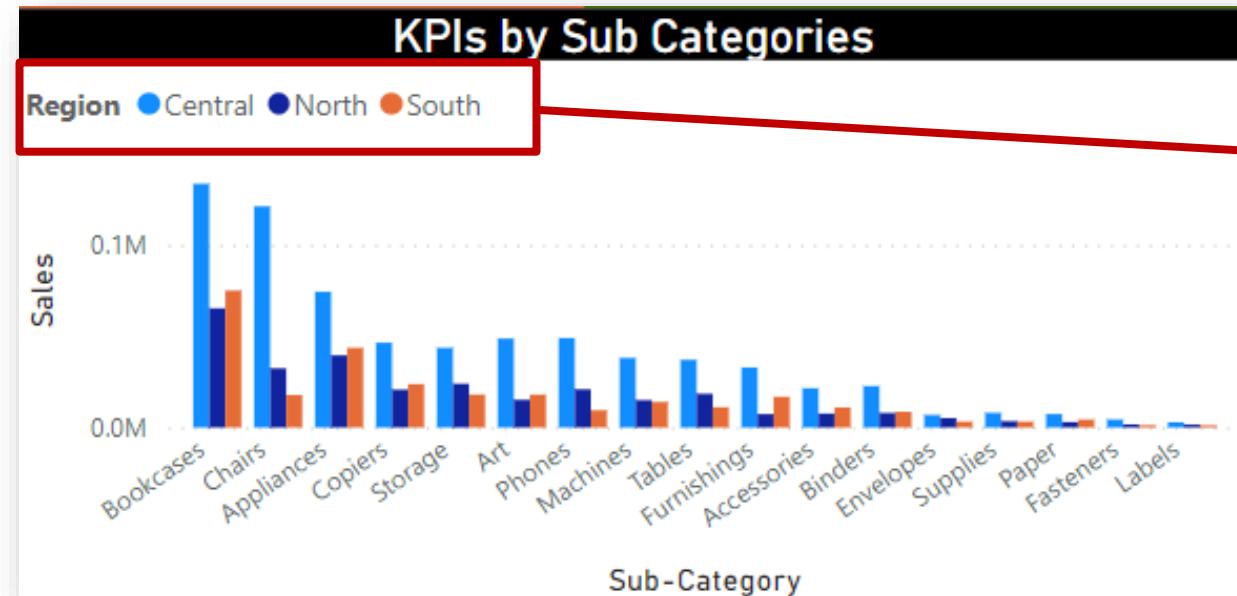
- X-axis:** Sub-Category
- Y-axis:** Sales
- Legend:** Add data fields here
- Small multiples:** Add data fields here
- Tooltips:** Profit

Creating a Column Chart – Legend

Legend further divides your visual into different colors by adding a second level of breakdown.

Adding Region to legend breaks all our subcategories from 1 column for each subcategory to 3 columns for each sub-category, all having different colors.

For ex – 1 Column of bookcases becomes 3 columns of Bookcases from Central, Bookcases from North & Bookcases from South.



Add fields in Legend as shown below.

X-axis

Sub-Category

Y-axis

Sales

Legend

Region

Small multiples

Add data fields here

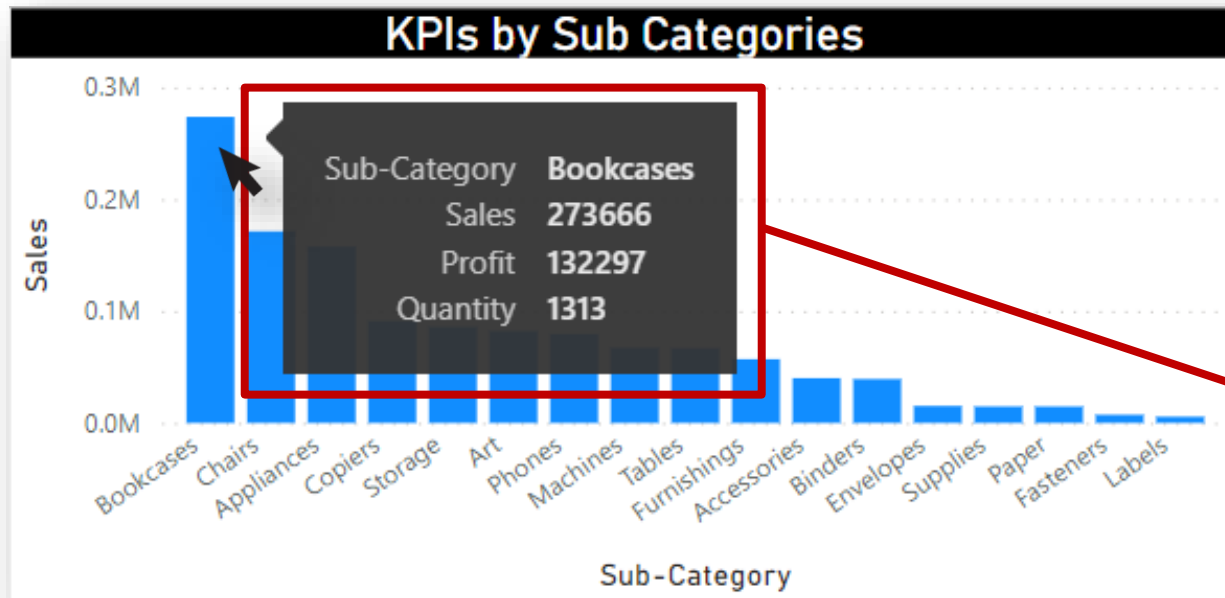
Tooltips

Profit

Creating a Column Chart – Tooltips

Any metric (numerical field) that you add in Tooltips will be visible to you when you hover over different elements of the visual.

For ex – After adding Profit to tooltips, whenever user hovers over ANY column of the column chart, they will see profit of that subcategory along with the Sales amount as well. Profit amount will only be visible as a value in the hover box and not as an additional column in the chart.



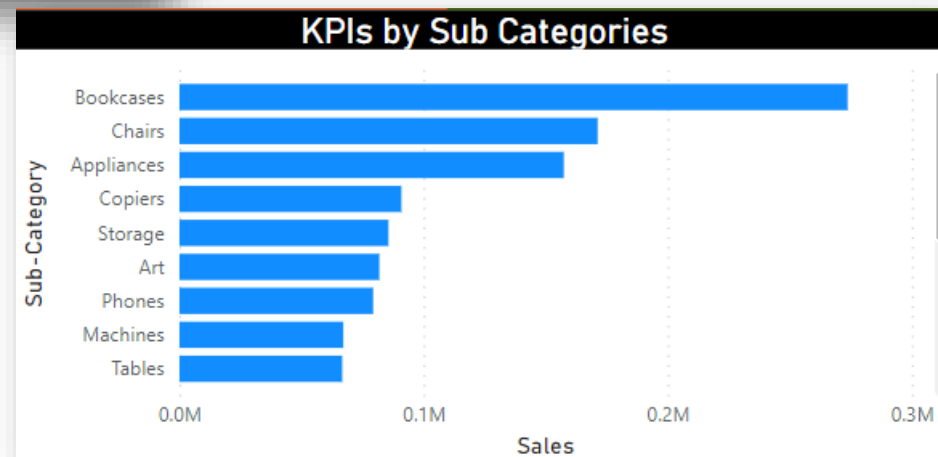
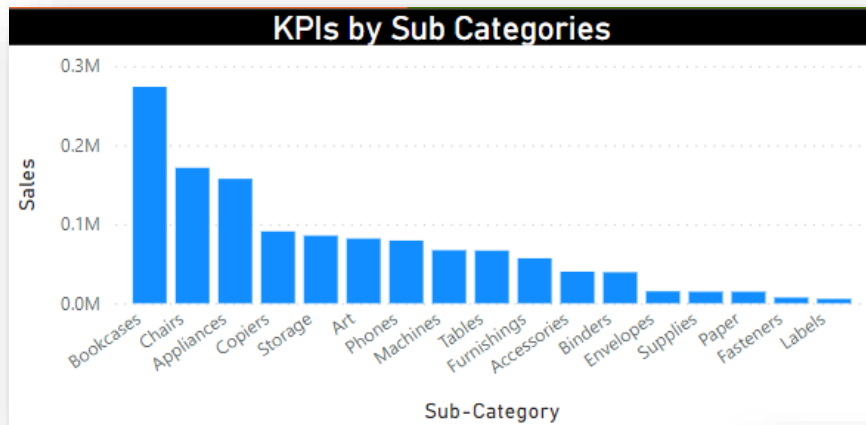
Add fields in Tooltips as shown below.

The configuration panel shows the following settings:

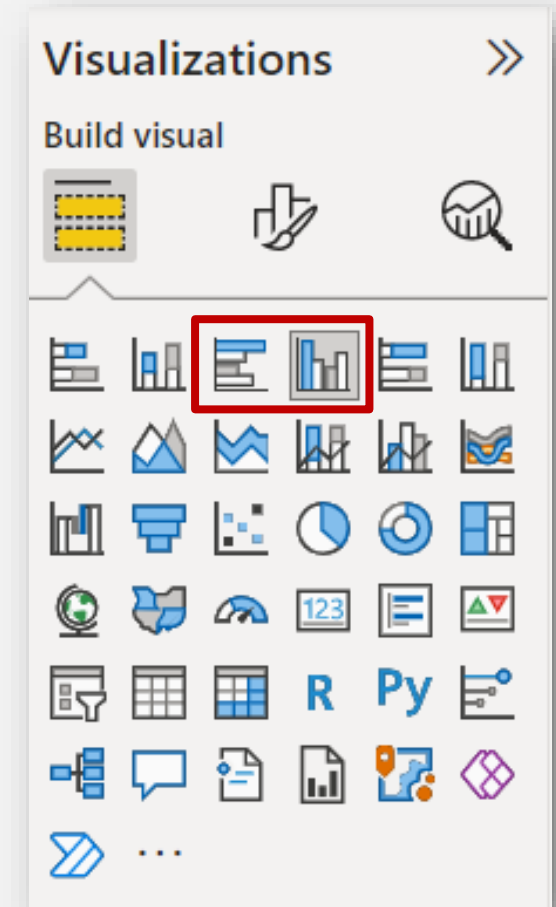
- X-axis:** Sub-Category
- Y-axis:** Sales
- Legend:** Add data fields here
- Small multiples:** Add data fields here
- Tooltips:** Profit

Creating a Bar Chart from a Column Chart

To create a Bar Chart, all you have to do is create a Column Chart & then click on Bar Chart icon in Visualization Pane to convert it to a Bar Chart.



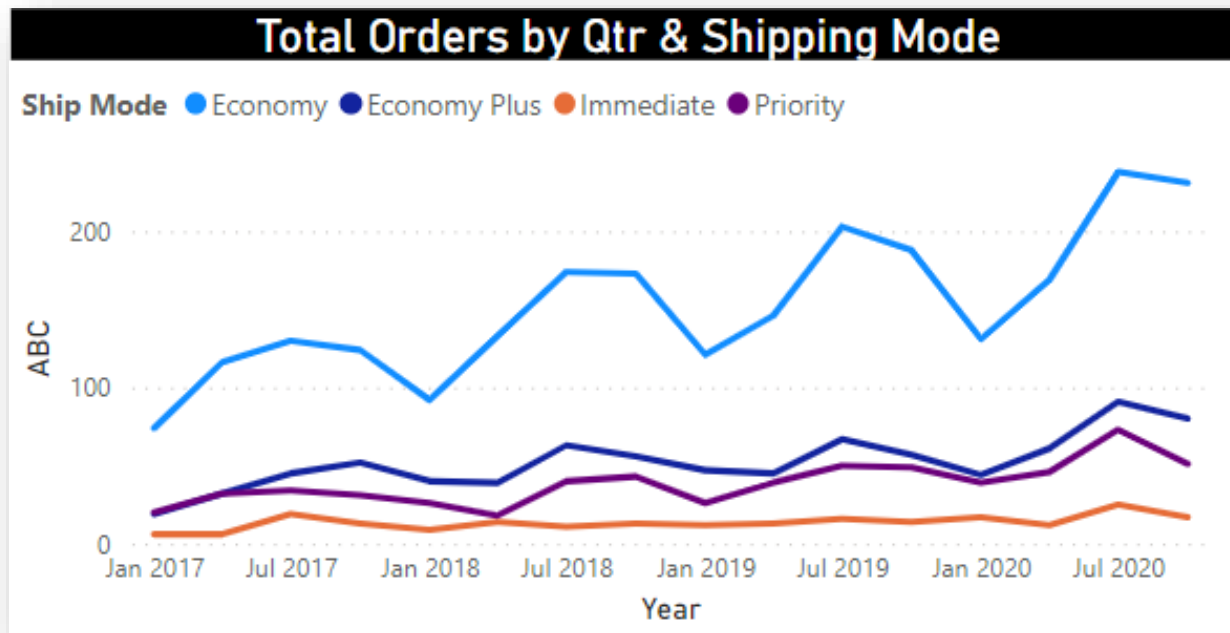
Switch from right icon to left icon.



Creating a Line Chart

To create a Line Chart, all you have to do is add your date field in X-axis & the numerical field you want to see the trend of in Y-axis.

By doing the above you will get one line showing trend of the numerical field over your date range. If you want to break it into multiple lines based on another field, such as Shipping Mode, add it to the legend as shown below.



Once completed, this is how your inputs will look like.

X-axis	
Order Date	✓ ✕
Year	✕
Quarter	✕
Y-axis	
Total Orders	✓ ✕
Secondary y-axis	
Add data fields here	
Legend	
Ship Mode	✓ ✕

Creating a Pie Chart

To create a Pie Chart, add your numerical field in **values** & the field by which you want to see a breakdown of your values in **legend**.

By doing the above you will get one line showing trend of the numerical field over your date range. If you want to break it into multiple lines based on another field, such as Shipping Mode, add it to the legend as shown below.

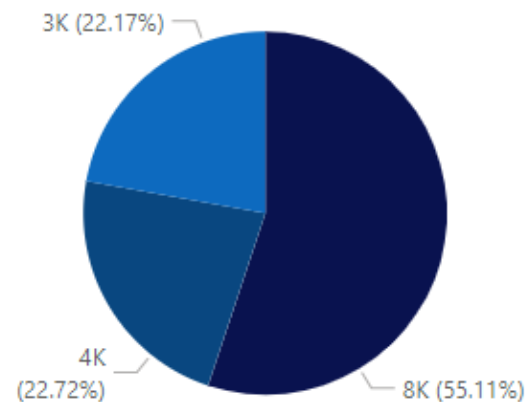
Step 1: Added Qty as Values

Quantity Sold by Region



Step 2: Added Region as Legend

Quantity Sold by Region



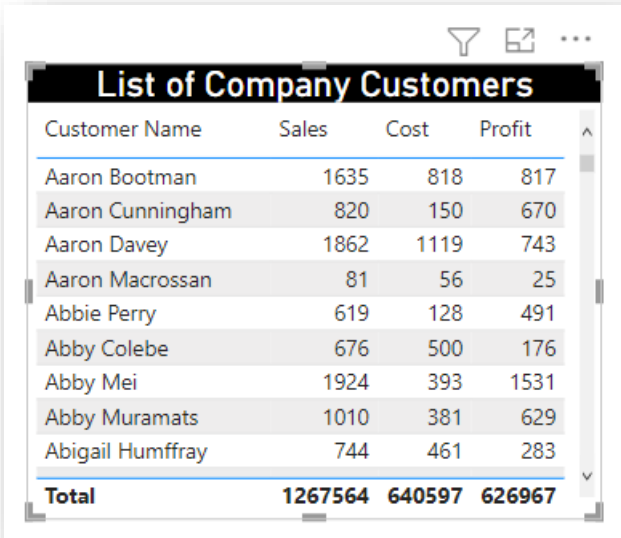
Once completed, this is how your inputs will look like.

The configuration panel is divided into four sections: Legend, Values, Details, and Tooltips. Each section has a dashed border and a close button (X) in the top right corner.

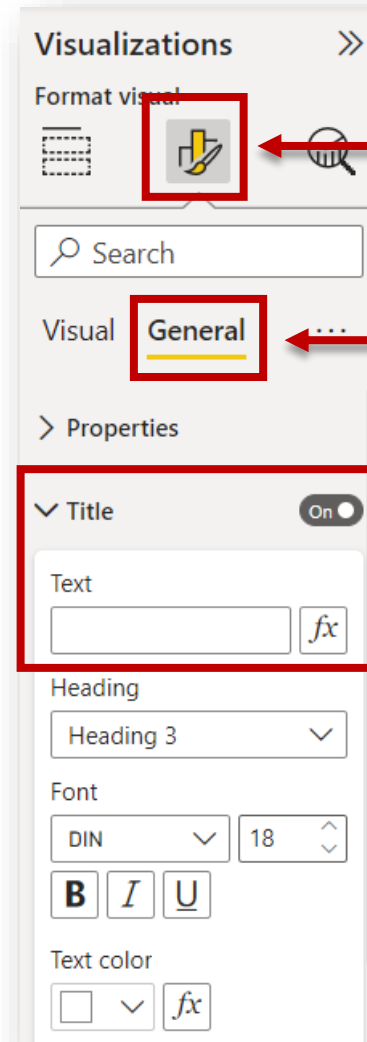
- Legend:** Contains a dropdown menu with the text 'Region'.
- Values:** Contains a dropdown menu with the text 'Quantity'.
- Details:** Contains a text input field with the placeholder text 'Add data fields here'.
- Tooltips:** Contains a text input field with the placeholder text 'Add data fields here'.

FAQ: How to add / change title of a visual

1. Select the visual by clicking on it.



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Aaron Davey	1862	1119	743
Aaron Macrossan	81	56	25
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Abby Mei	1924	393	1531
Abby Muramats	1010	381	629
Abigail Humffray	744	461	283
Total	1267564	640597	626967



2. Click on the Format Visual icon under the Visualizations Pane.

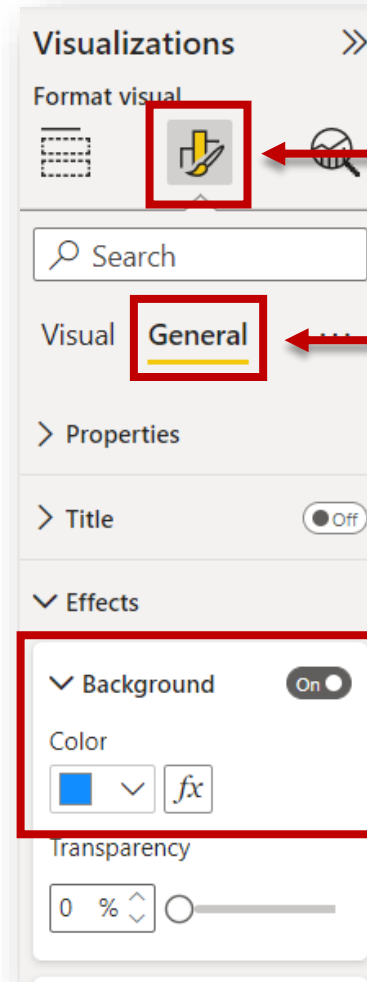
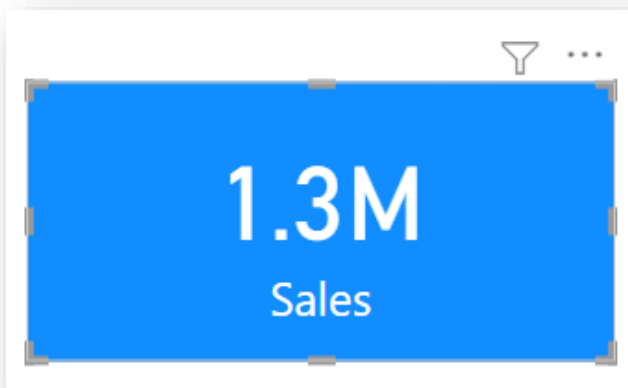
3. Click on the General Tab

4. Enable title & add your title under "Text"

Tip: You can further format title by adding background, changing font style, etc by using the options below "text".

FAQ: How to change background of a scorecard (or any other visual)

1. Select the visual by clicking on it.



2. Click on the Format Visual icon under the Visualizations Pane.

3. Click on the General Tab

4. Go to “Background” under the Effects Section & Change the color by clicking on **color icon.**