100 XP

Introduction

1 minute

Continue to use your file from the previous module. If you're joining the Dashboard in a Day at this point you can open the completed files to catch up.

In this Module, you still are the CMO of VanArsdel, Ltd., and you need to complete your report. You learn to import custom visuals and add bookmarks to your report to prepare your report to publish to the Power BI Service.

Next unit: Exercise - Import custom visuals

Continue

100 XP

Exercise - Import custom visuals

7 minutes

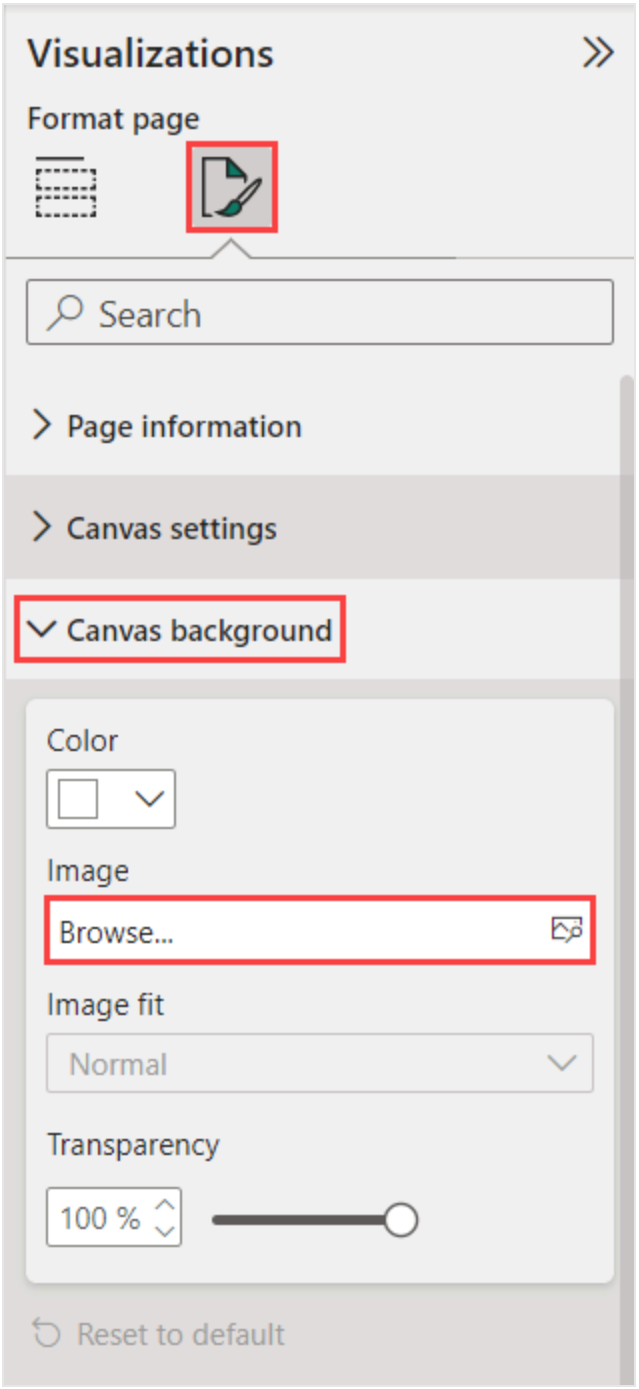
Power BI comes with many stylization options out of the box, but users are also given the opportunity to import their own visuals. Let's go over this process.

Make sure you're using the **MyFirstPowerBIModel** file you have been working on in the previous units. If you missed the previous modules, or are starting from this one, open the **Lab 4 solution.pbix** file located in the **Reports** folder of your student files.

Section 1: Add background images

We can use a background image to format the report. Let's try it.

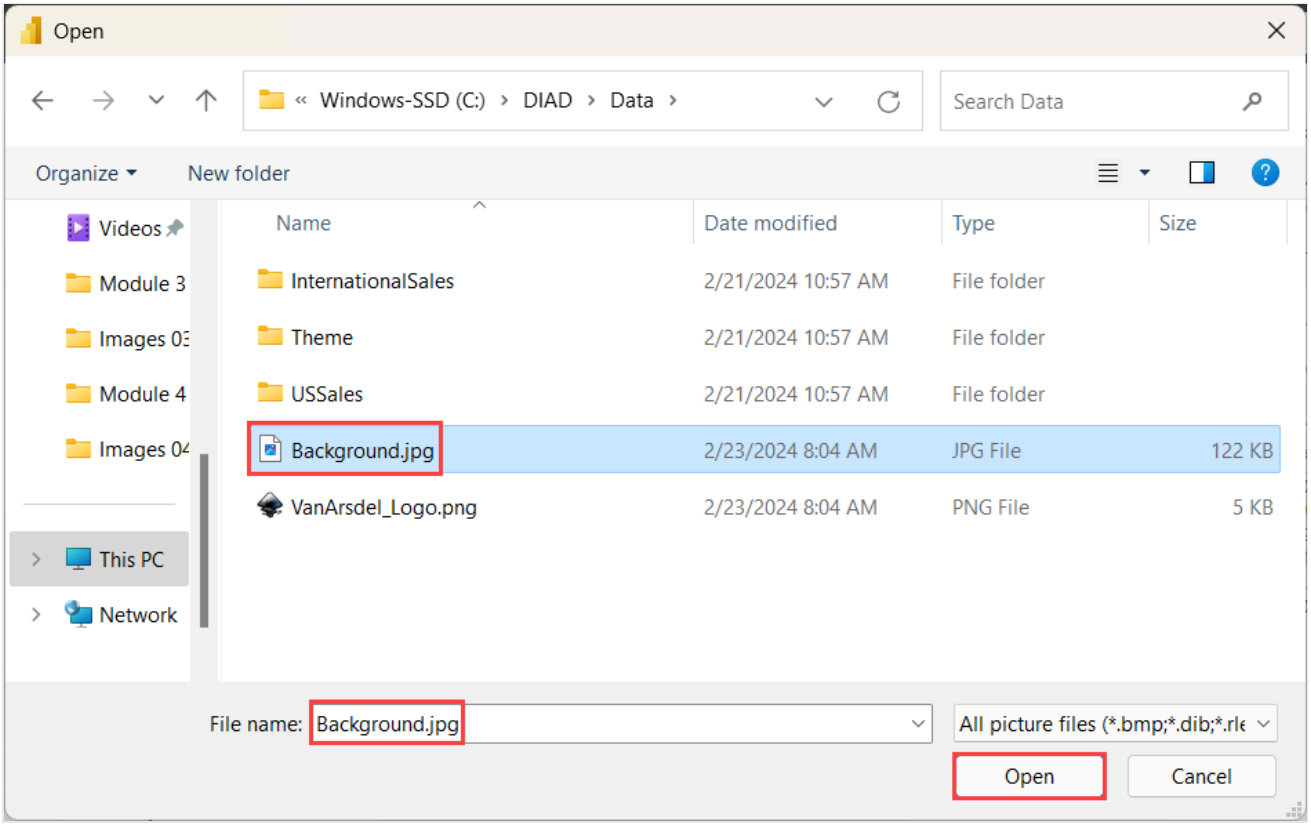
1. Select the white space in the canvas to deselect any selected visuals.
2. From the **Visualizations** pane, select the **Format page** tab (*the paint brush icon*).
3. Expand the **Canvas Background** section.
4. Select the **Browse Image** button.



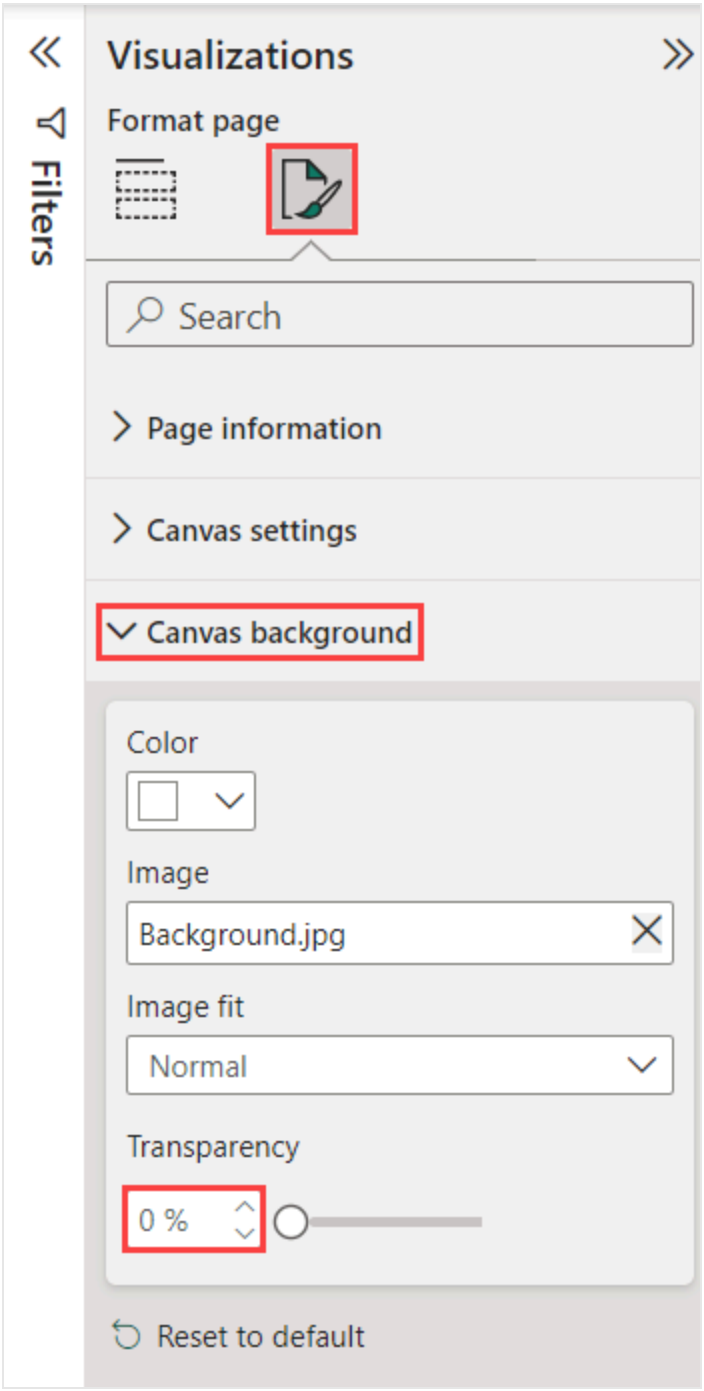
5. A **File** browser dialog box opens. Browse to the **DIAD** folder, then the **Data** folder (DIAD/Data).

6. Select the **Background.jpg** file.

7. Select the **Open** button.

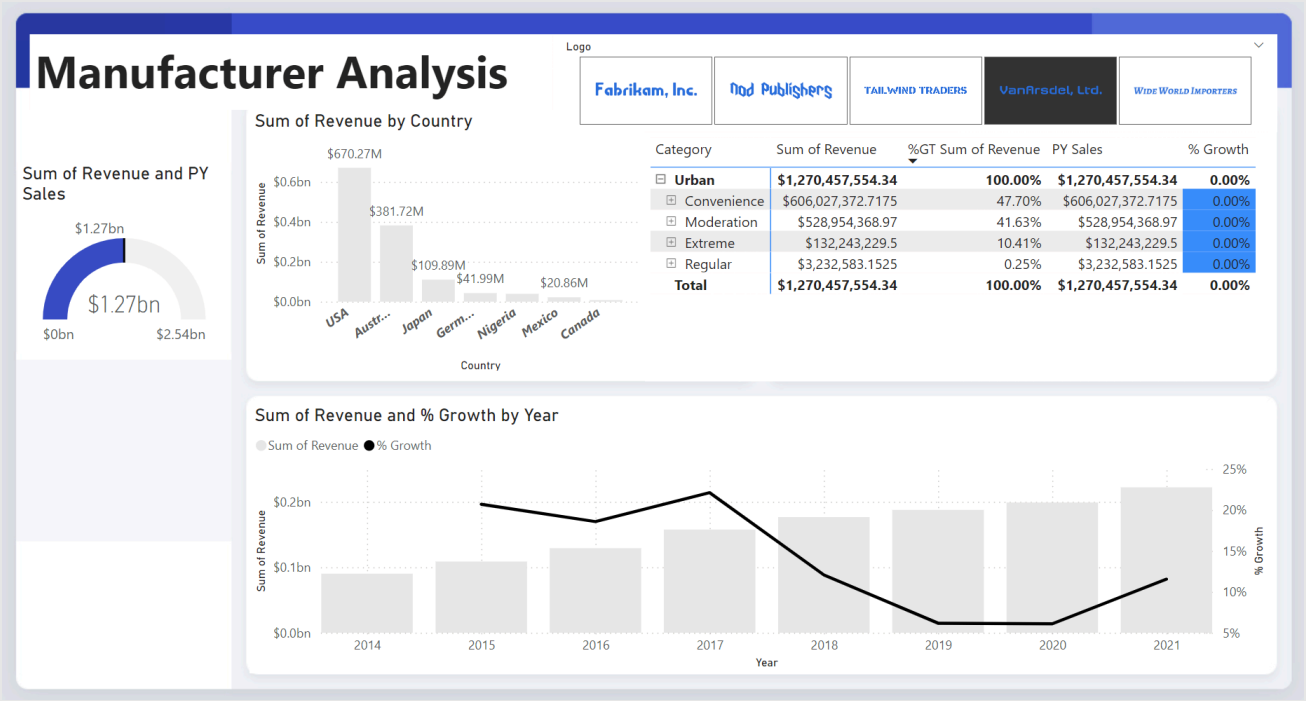


8. Within the **Canvas background** section of the **Visualizations** pane, change and set the **Transparency** slider to **0%**.



Notice our template has space for a **header** and **slots** for images.

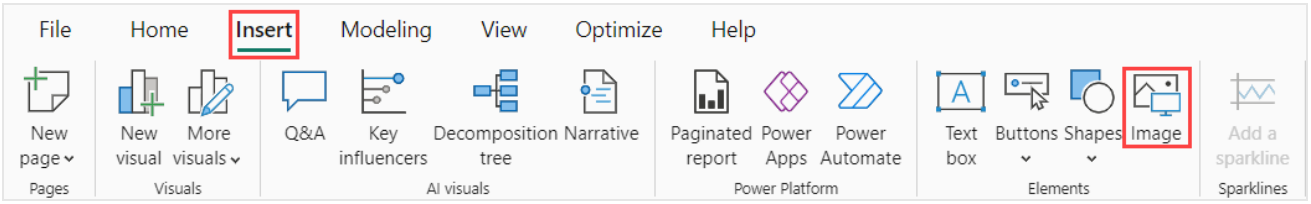
9. Resize and position the visuals as shown in the figure below:



Section 2: Add a logo

Now let's add a logo.

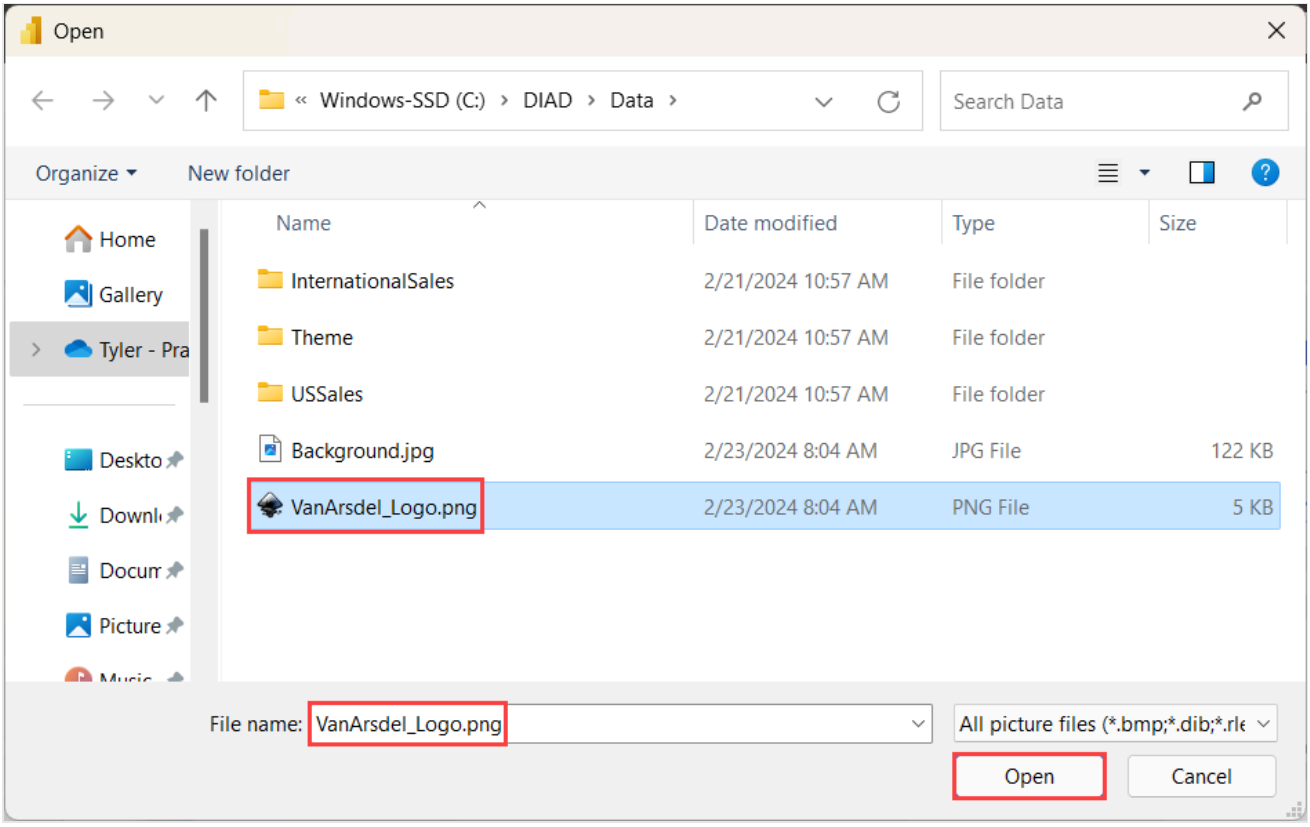
1. From the ribbon, select the **Insert** tab and then choose **Image**.



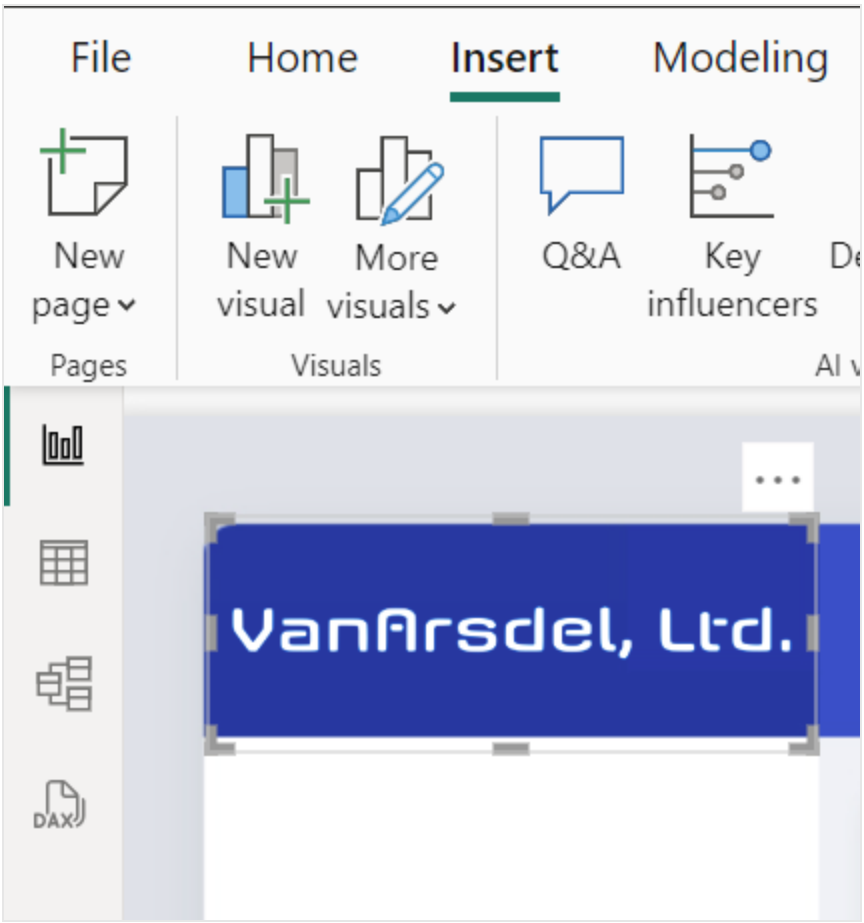
2. The **File** browser dialog opens. Browse to the **DIAD** folder then the **Data** folder (DIAD/Data).

3. Select the **VanArsdel_Logo.png** file.

4. Then, select **Open**.



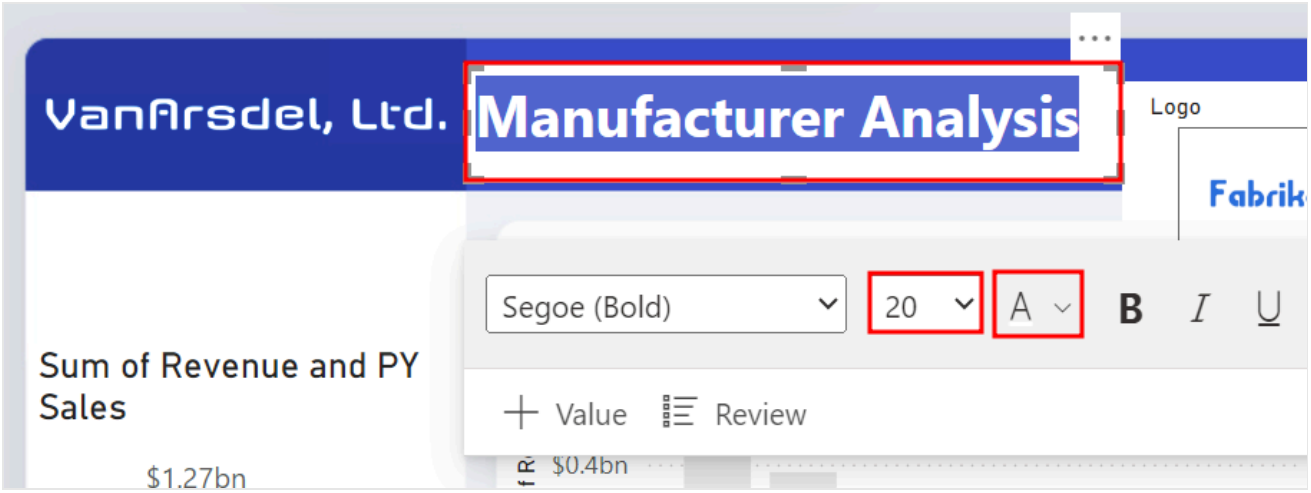
5. Resize and drag the image to the top left corner of the report.



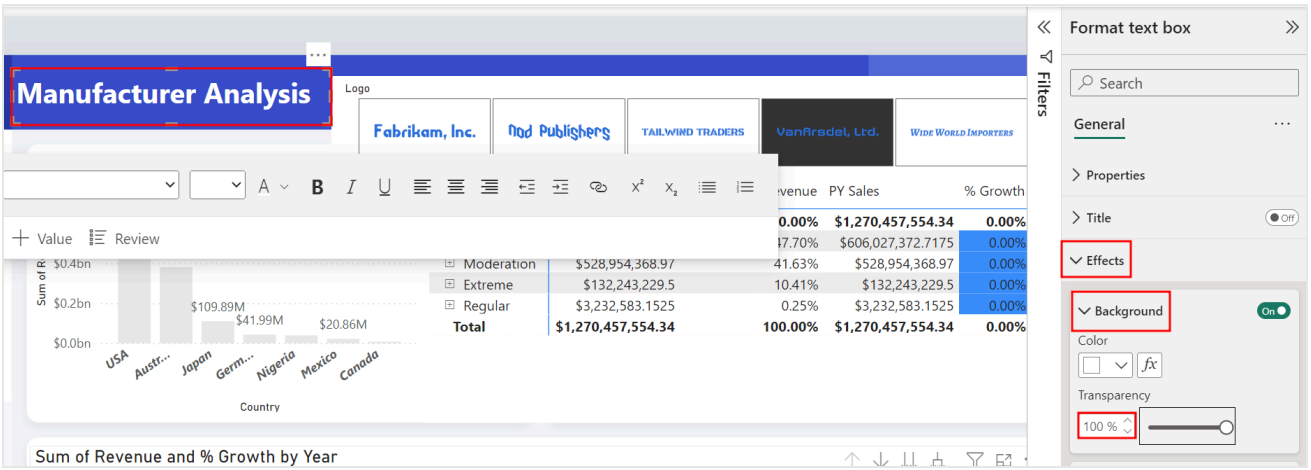
> **Note**
>
> The logo is white. You will need to place it over the blue background to see it.

Now let's change the font color of the report title.

6. Highlight **Manufacturer Analysis** within the text box.
7. Select the drop-down arrow next to the **A** to change the font color.
8. Select the color **white**.
9. Change the **font size** to **20**.



10. Expand the **Background** sub-section within the **Effects** section of the **Format text box** pane.
11. Set the **Transparency** to **100%**.
12. Resize and move the visuals around if needed, making sure they're still in the same locations as before.

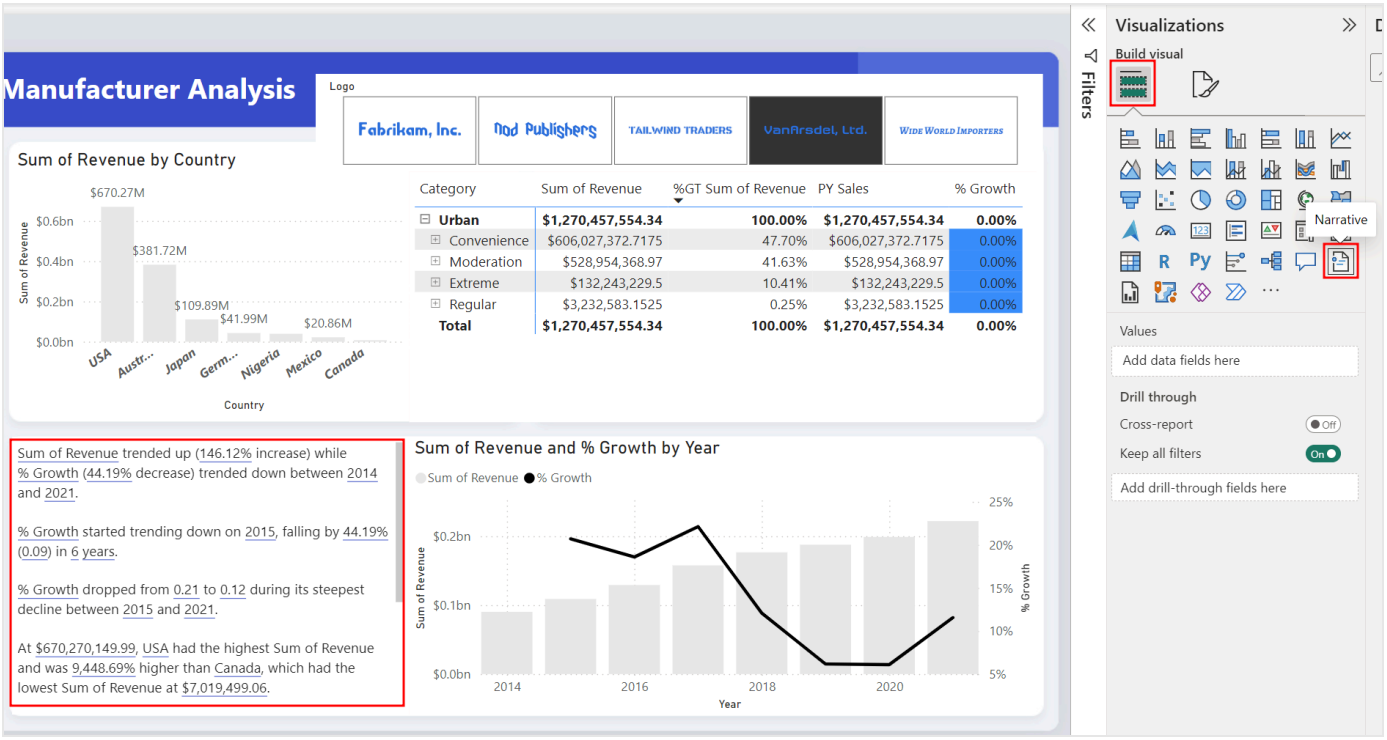


Now let's add a **smart narrative visual** to our report.

13. First, resize the **Sum of Revenue and % Growth by Year** visual to make space to the left of the visual at the bottom of the report.

14. Add a **Smart Narrative visual** to the canvas. Remember, you need to deselect any current visuals by selecting blank space on the canvas.

The Smart Narrative visualization helps you quickly summarize visuals and reports. It provides relevant innovative insights that you can customize.



Section 3: Import custom visuals

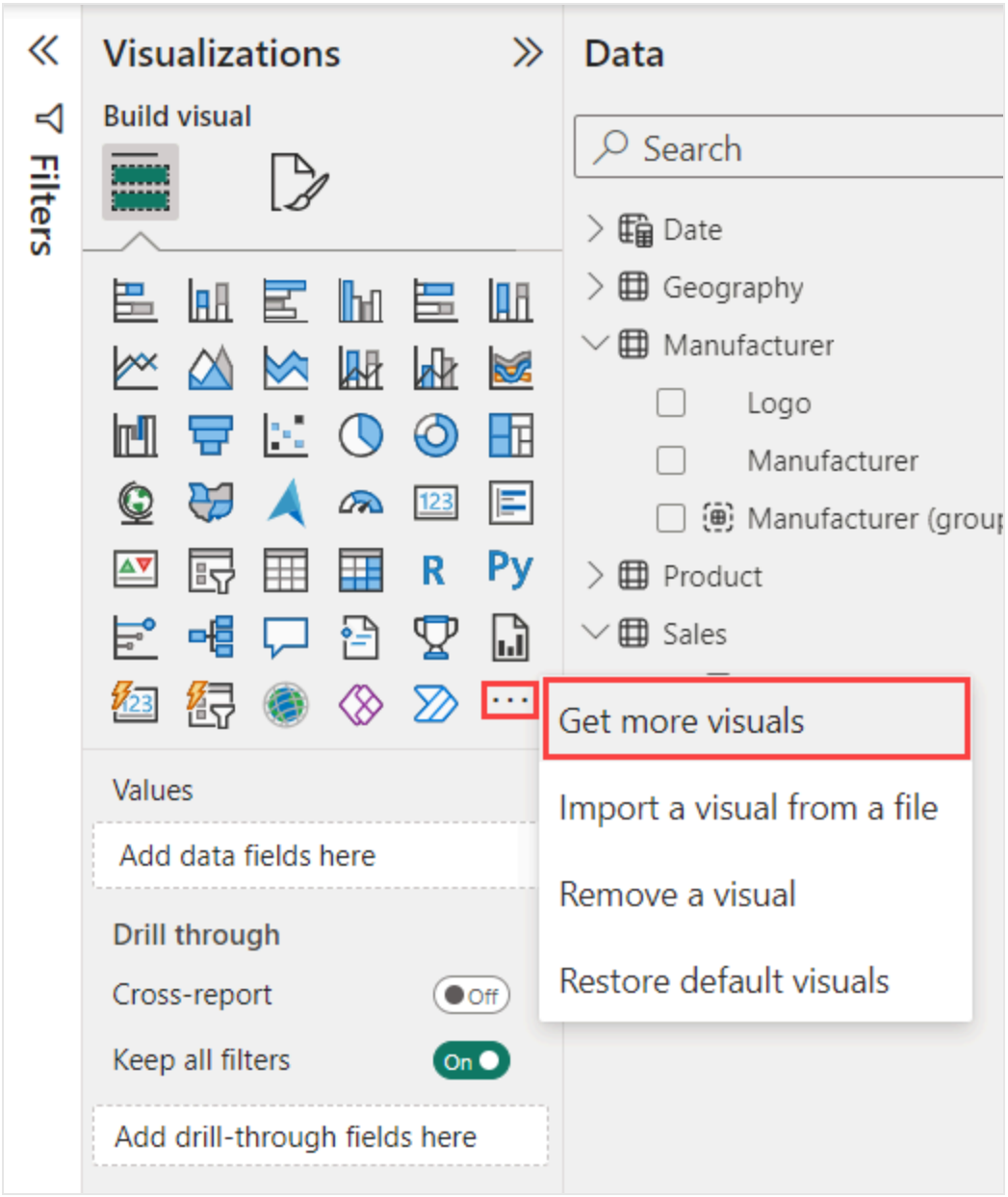
Out of the box, Power BI has a large selection of visuals. However, there might be a use-case when you need a custom visual. To meet this requirement, the visualization engine is open-sourced. The Power BI community contributes visuals in the marketplace. You can add and use these visuals in your reports.

There's also an option to create your own visual or import visuals in Power BI Desktop.

Now, let's add a **custom visual**.

1. From the **Visualizations** pane, select the **ellipses** (...) in the last row of visuals.

2. Select **Get more visuals**.

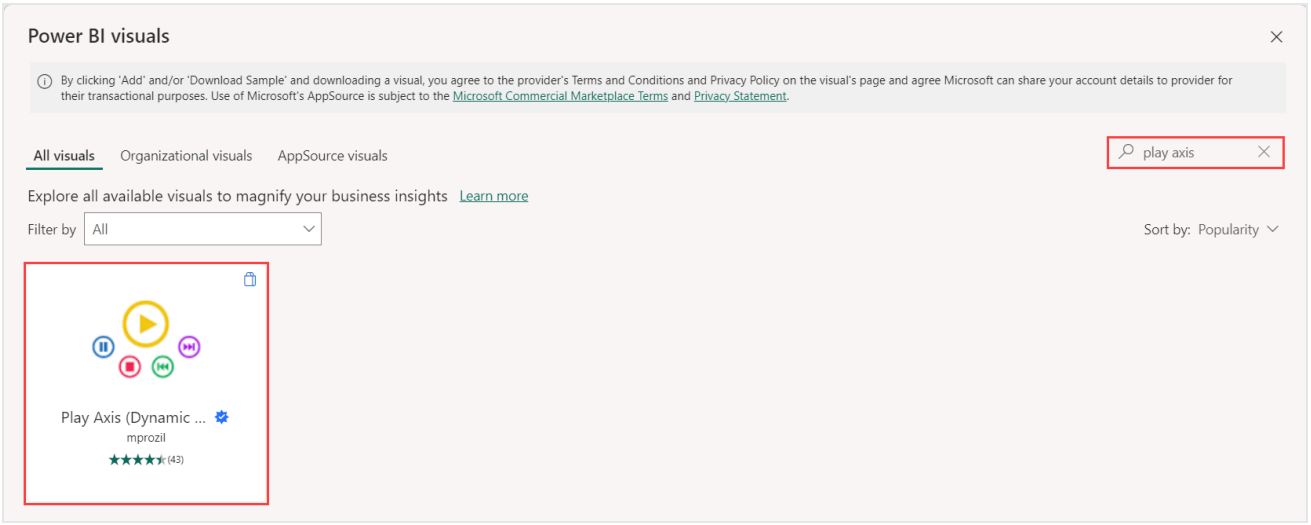


> **Note**
>
> You might be asked to sign into your Power BI account to access the custom visuals library. If you're unable to login, you can select **Import a visual from a file** and select the **Play Axis** visual that's found in the class files in the **Data** folder.

3. Type **play axis** in the **search box** in the top right-hand corner of the Power BI visuals dialog box.

4. Select the **Search** icon.

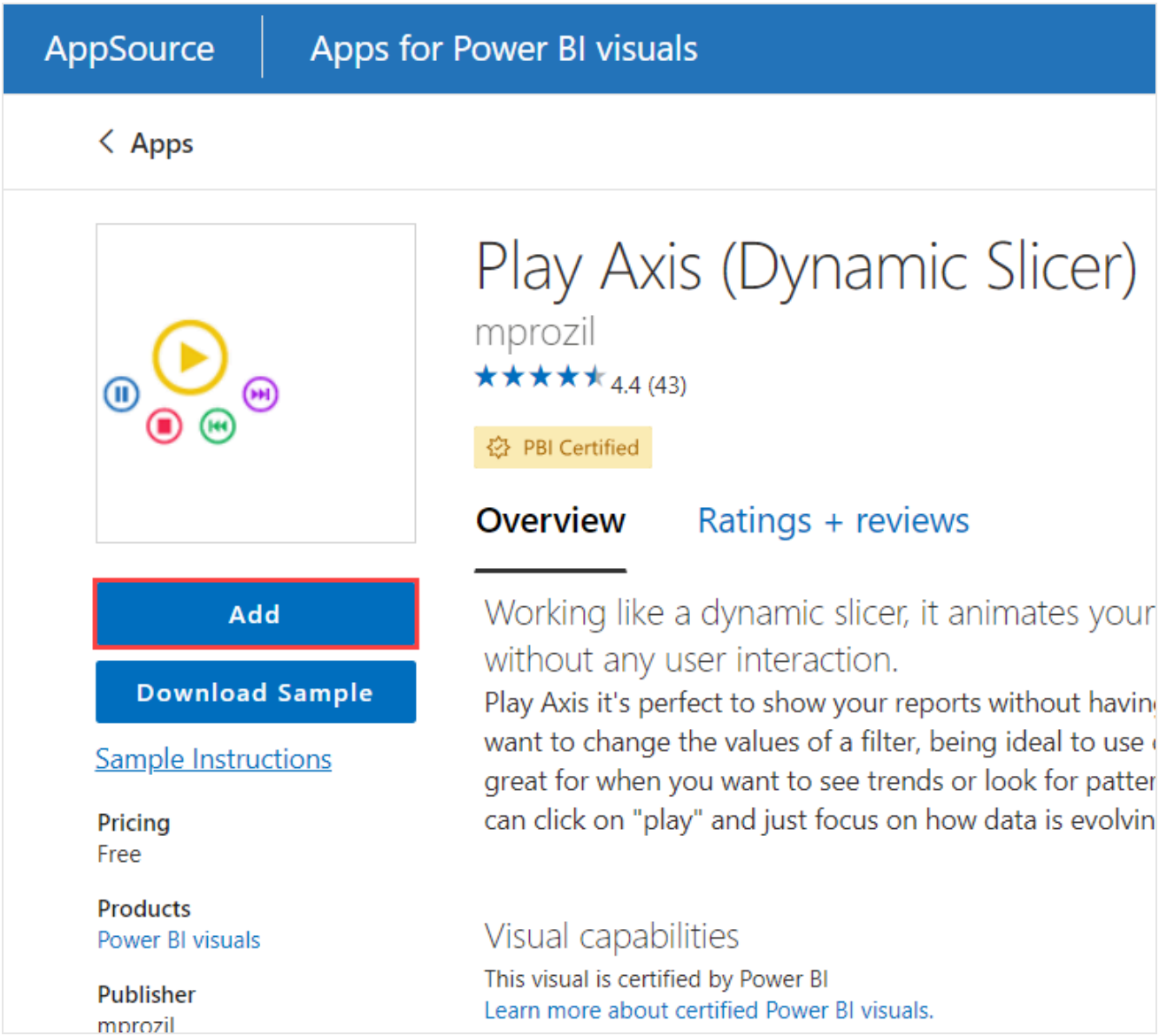
5. Select the **Play Axis (Dynamic Slicer)**.



> **Note**
>
> Notice the checkmark in the blue star. This image helps to identify certified custom visuals. Custom visuals that meet Power BI teams coding requirements are certified. Certified custom visuals support features like export to PowerPoint and the ability to display in subscription emails which aren't supported by non-certified custom visuals.

6. The **AppSource** dialog box appears.

7. Select the **Add** button below the **Play Axis (Dynamic Slicer)** cover image.

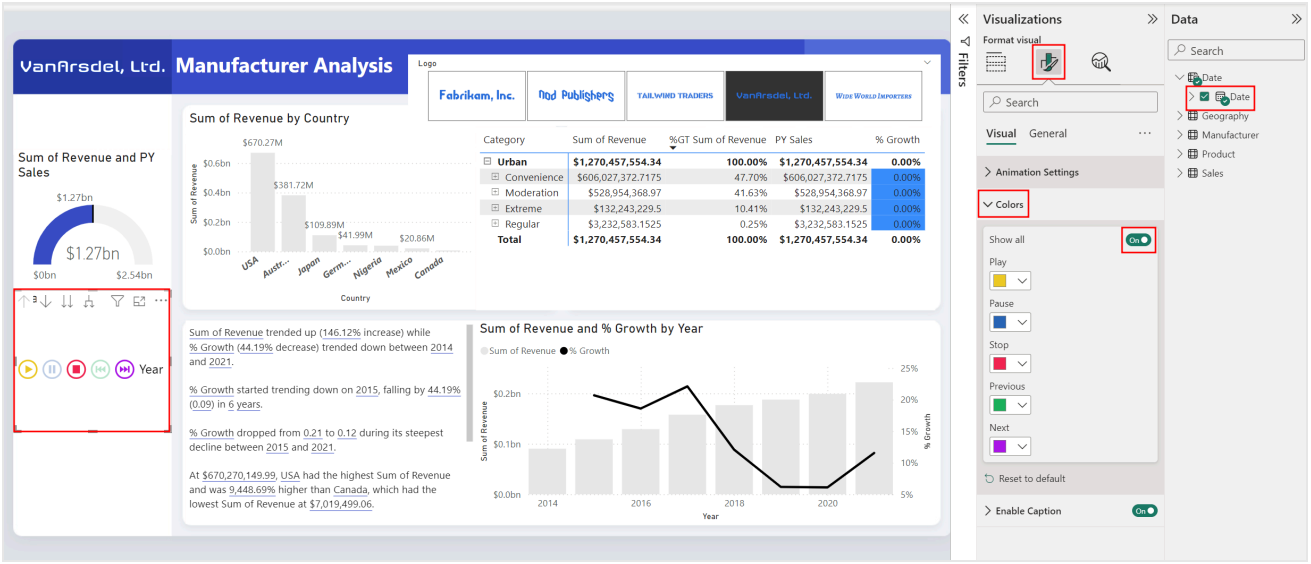


8. After a few moments, you should see a notification that the visual was successfully imported. Select **OK**.

   Notice a new visual is added to the list of available visuals.

9. Select the white space in the canvas to deselect anything that might be currently selected.
10. From the **Visualizations** pane, select the newly imported **Play Axis** visual.
11. From the **Data** pane, select the **checkbox** next to the **Date** field in the **Date** table.
12. From the **Visualizations** pane, select the **Format visual** tab.
13. Expand the **Colors** section.
14. Turn on the **Show all** option.

15. **Resize** and **position** the visual as shown in the figure below.



Next unit: Exercise - Add bookmarks to a report

Continue >

100 XP

Exercise - Add bookmarks to a report

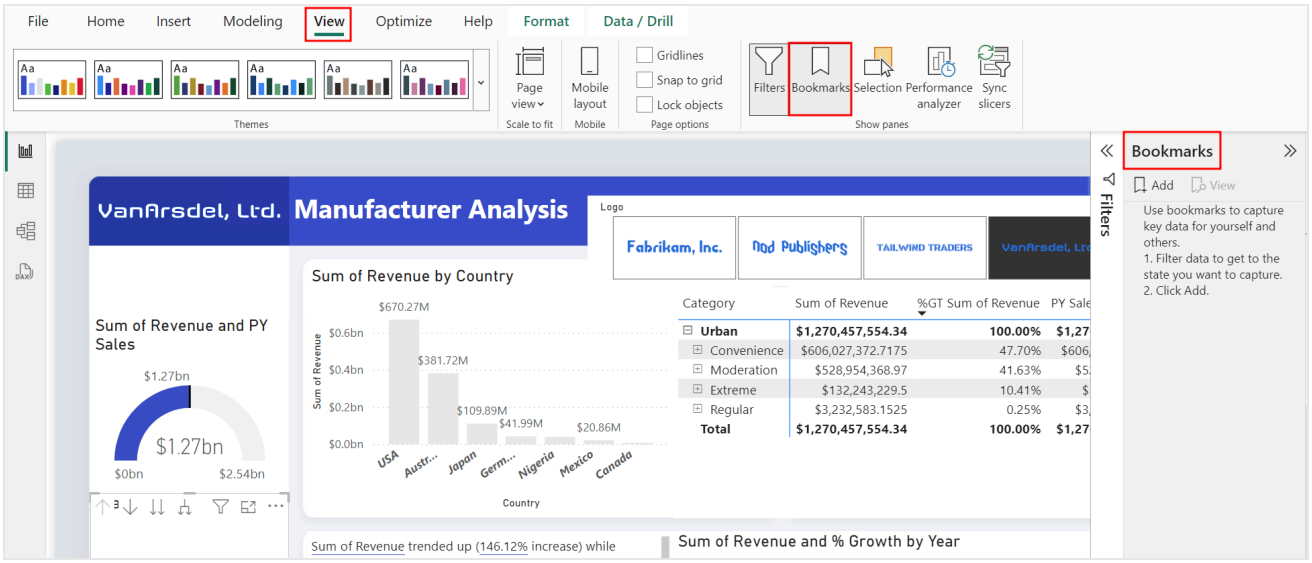
7 minutes

Now that we have a report ready, let's use **Bookmarks** to tell the story we discovered. Bookmarks capture the currently configured view of a report page, including filtering and the state of visuals, which helps to present the story.

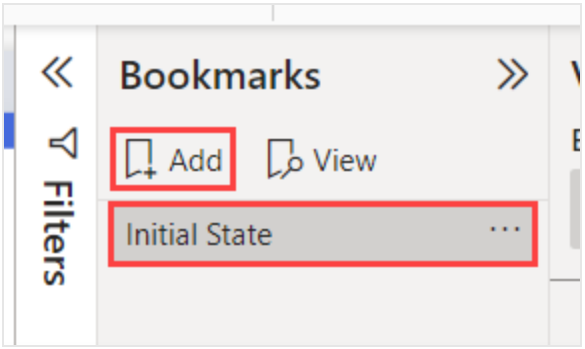
Section 1: Add bookmarks

Make sure you're using the **MyFirstPowerBIModel** file you've been working on in the previous units.

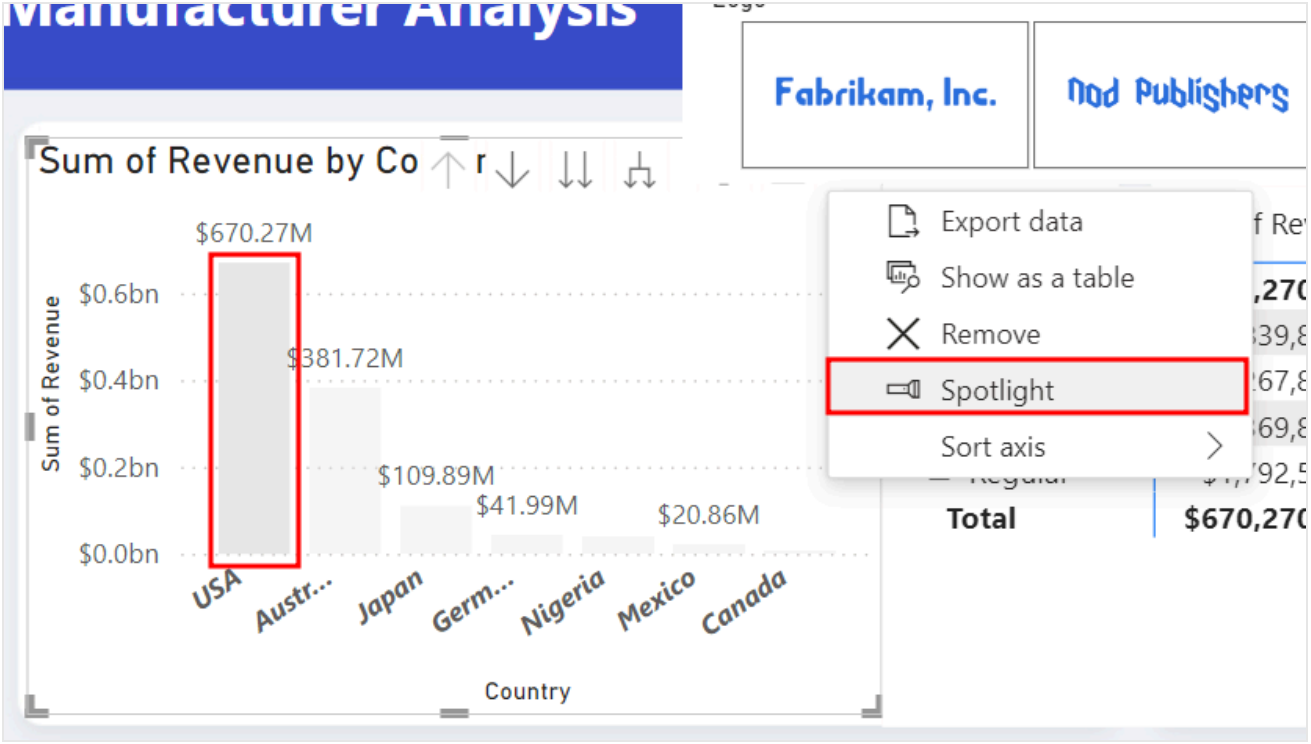
1. From the ribbon, select the **View** tab.
2. Select the **Bookmarks** button to turn on Bookmarks. The **Bookmarks** pane opens.



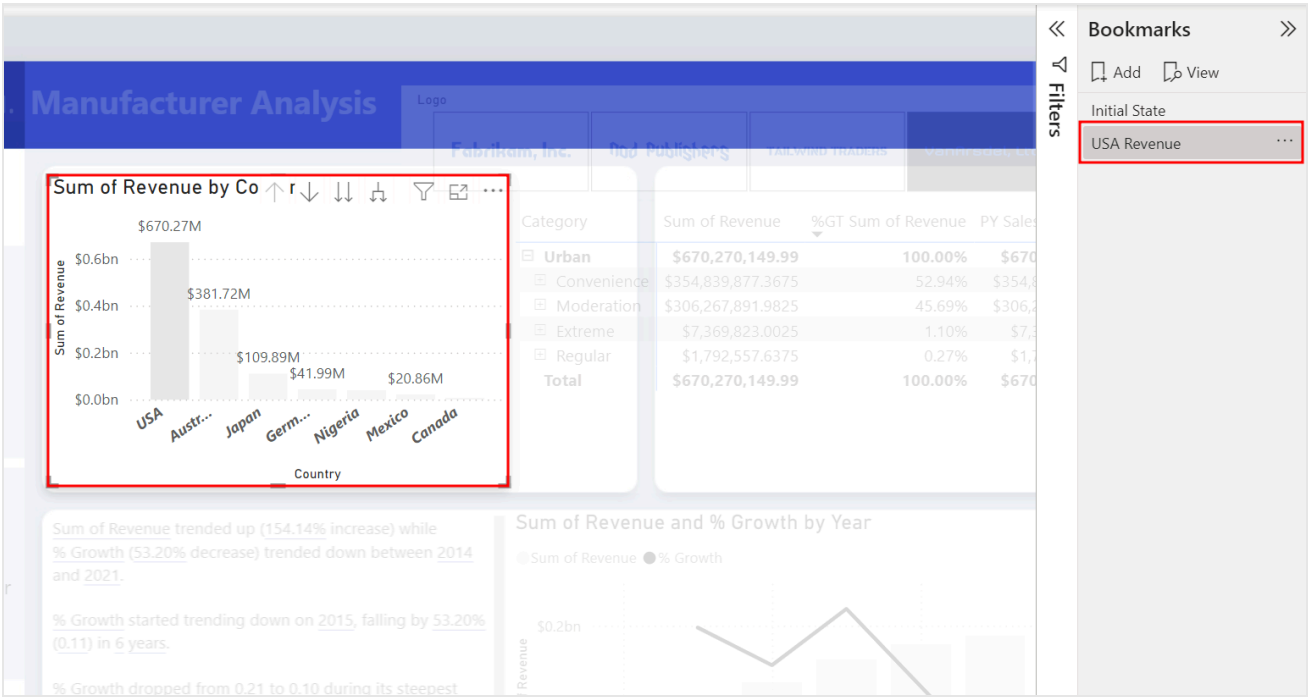
3. Select **Add** in the **Bookmarks** pane. This adds the current state of the visual to the bookmark.
4. Select the **ellipses** (...) to the right of the newly created **Bookmark 1**.
5. Choose **Rename** and change the name to **Initial State**.



6. In the **Sum of Revenue by Country** visual, select the **USA** column.
7. Hover over the **Sum of Revenue by Country** visual and select the **ellipses** (...) on the top right corner.
8. Select **Spotlight**.



9. In the **Bookmarks** pane, select **Add**. This adds a new bookmark with the current state of the report.
10. Change the bookmark name to **USA Revenue**.

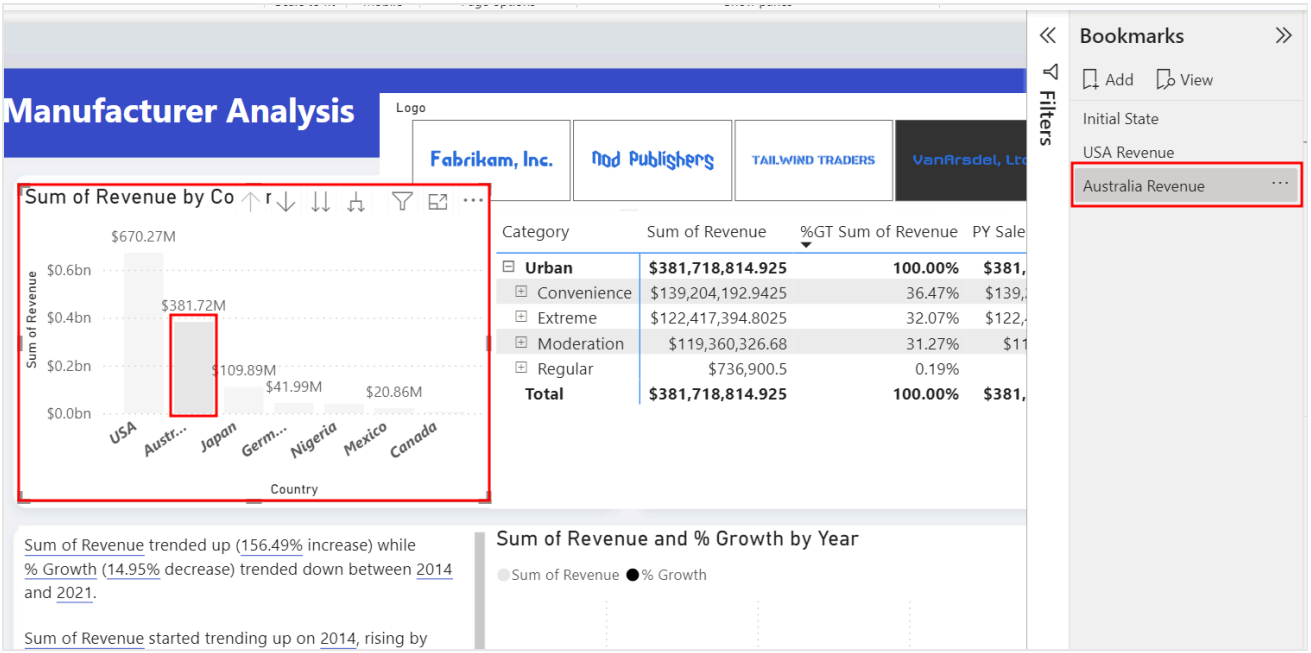


11. Select the canvas to ensure that nothing is currently selected.

12. Select **Australia** within the **Sum of Revenue by Country** visual.

13. In the **Bookmarks** pane, select **Add**. This adds a new bookmark with the current state of the report.

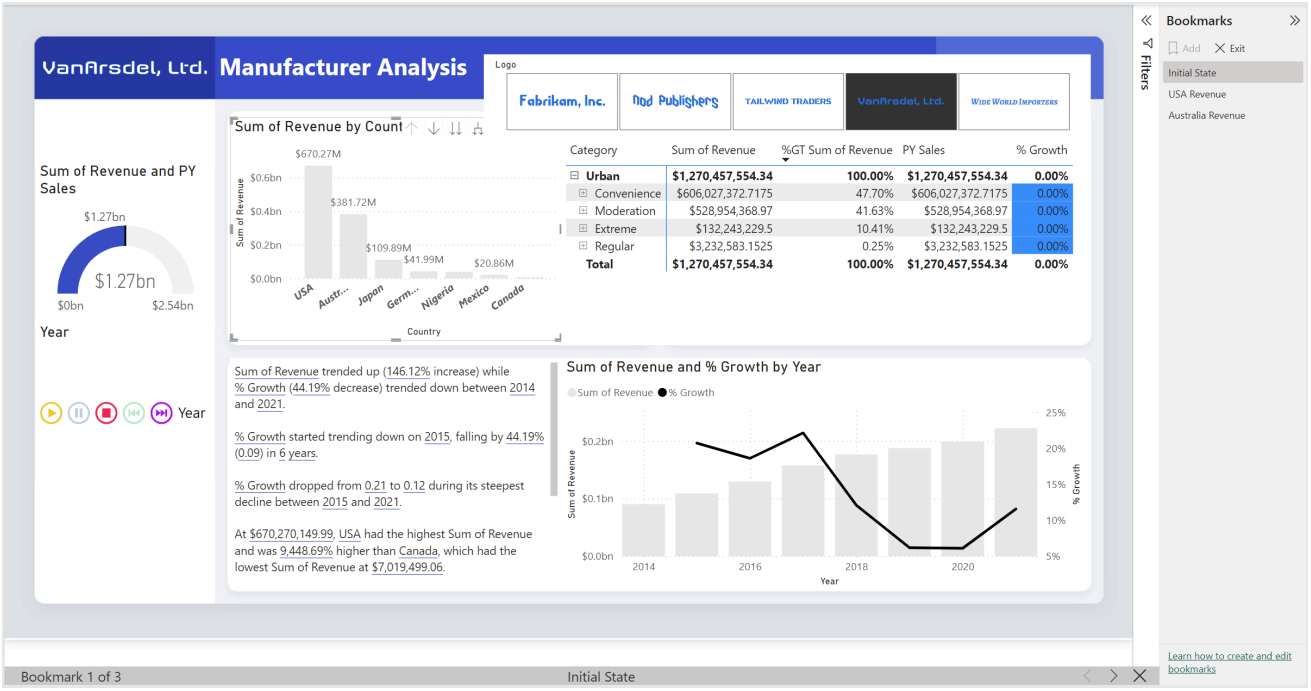
14. Change the bookmark name to **Australia Revenue**.



15. From the **Bookmarks** pane, select **View**. You're now in Bookmarks slide show mode. You're in the first bookmark, which we named **Initial State**. Notice on the bottom of the report

pane there's an option to navigate between bookmarks.

16. You can use the arrows to navigate between bookmarks and tell your story.



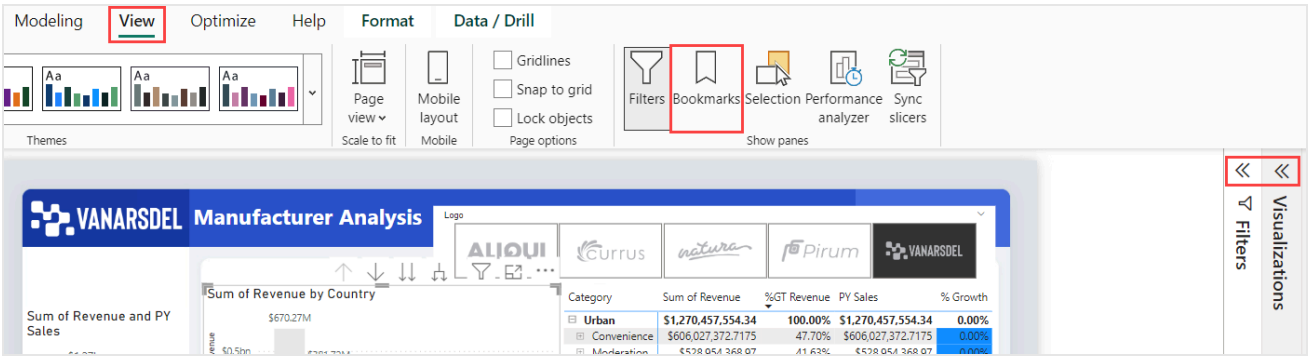
17. From the **Bookmarks** pane, select **Exit** to exit the Bookmarks slide show mode.

    If time permits, feel free to explore other options available with Bookmarks, such as **Selected Visuals**, as you continue to build your story.

18. From the ribbon, select the **View** tab.

19. *Unselect* the **Bookmarks Pane** button.

20. Collapse the **Visualizations** and **Filters** panes by selecting the arrows to the top left corner of each pane.



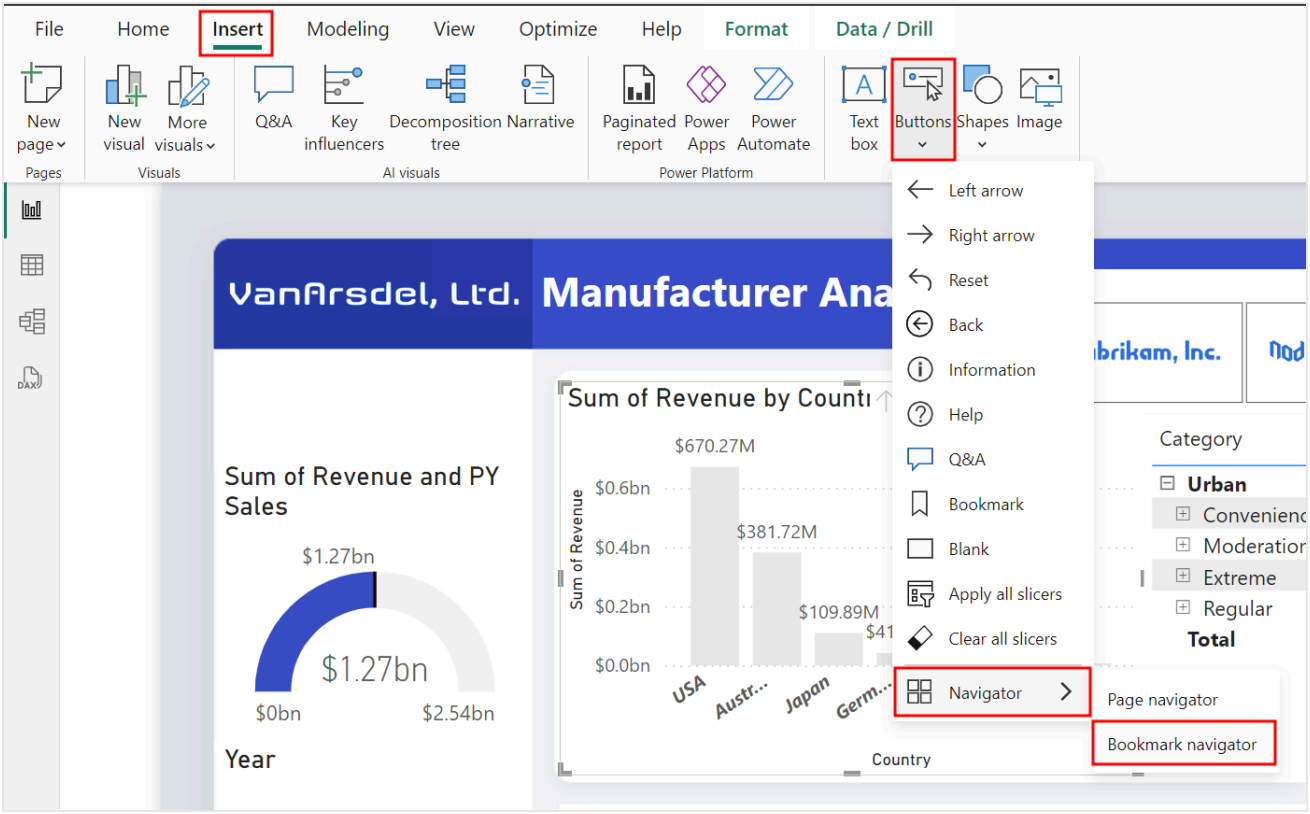
Now we move on to adding a **Bookmark navigator** to move freely between bookmarks.

Section 2: Add a bookmark navigator

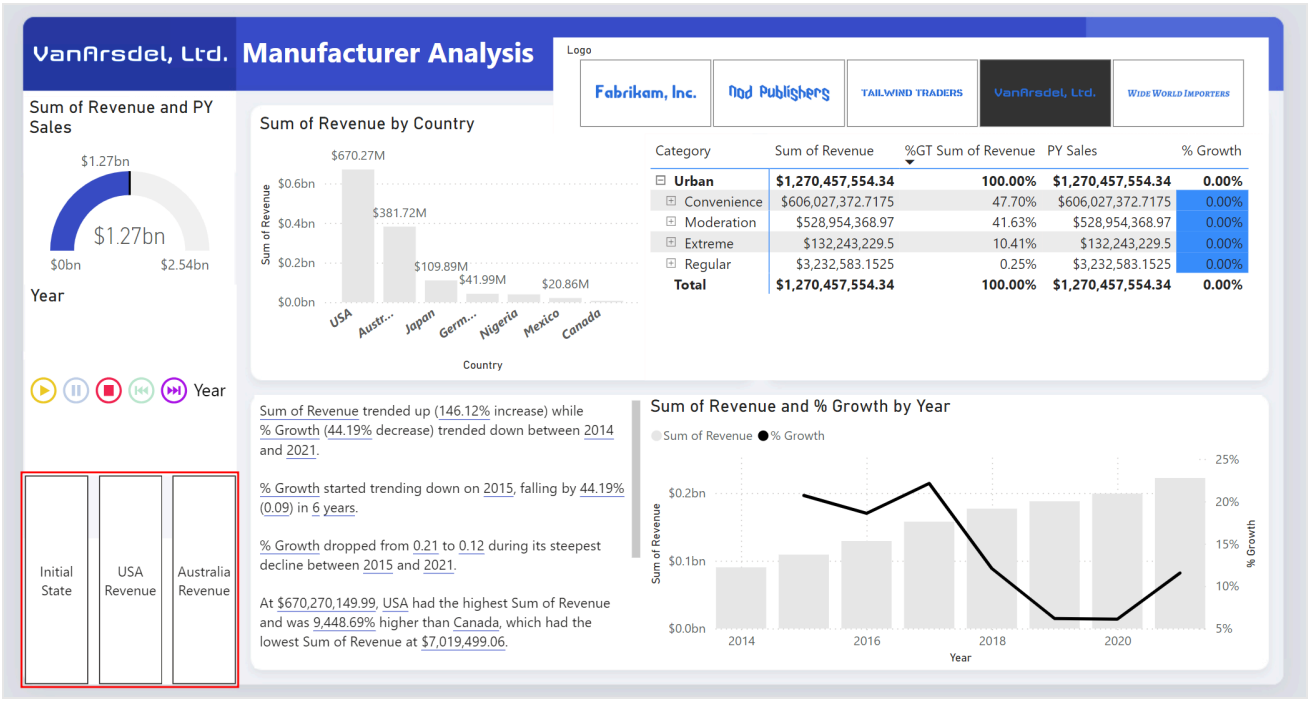
Let's add bookmark navigator buttons to the canvas.

1. From the ribbon, select the **Insert** tab.

2. Select **Buttons** and choose **Navigator** > **Bookmark navigator**.

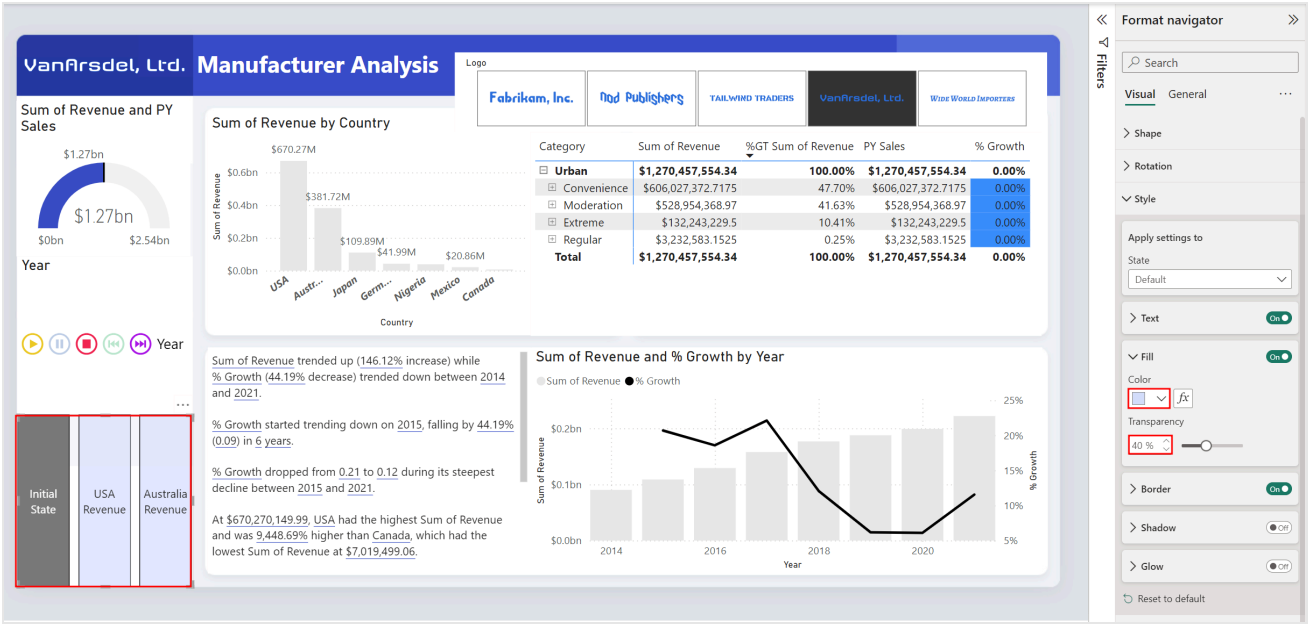


3. Arrange the Bookmark navigator to fit on the page as shown in the figure below:



4. With the buttons visual still selected, navigate to the **Format navigator** pane, expand the **Style** section, then expand the **Fill** section.

5. Change the **Fill color** to a **light blue** and set the **Transparency** to **40%**.

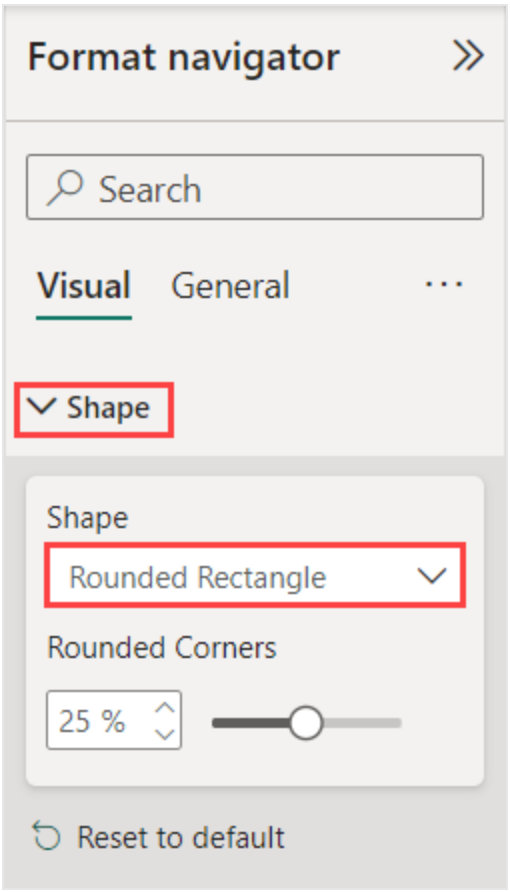


6. While still in the **Format navigator** pane, expand the **Shape** section.

7. From the **Shape** drop-down menu, select **Rounded Rectangle**.

> **Note**

You may need to adjust the size of the buttons within the report after changing the shape.

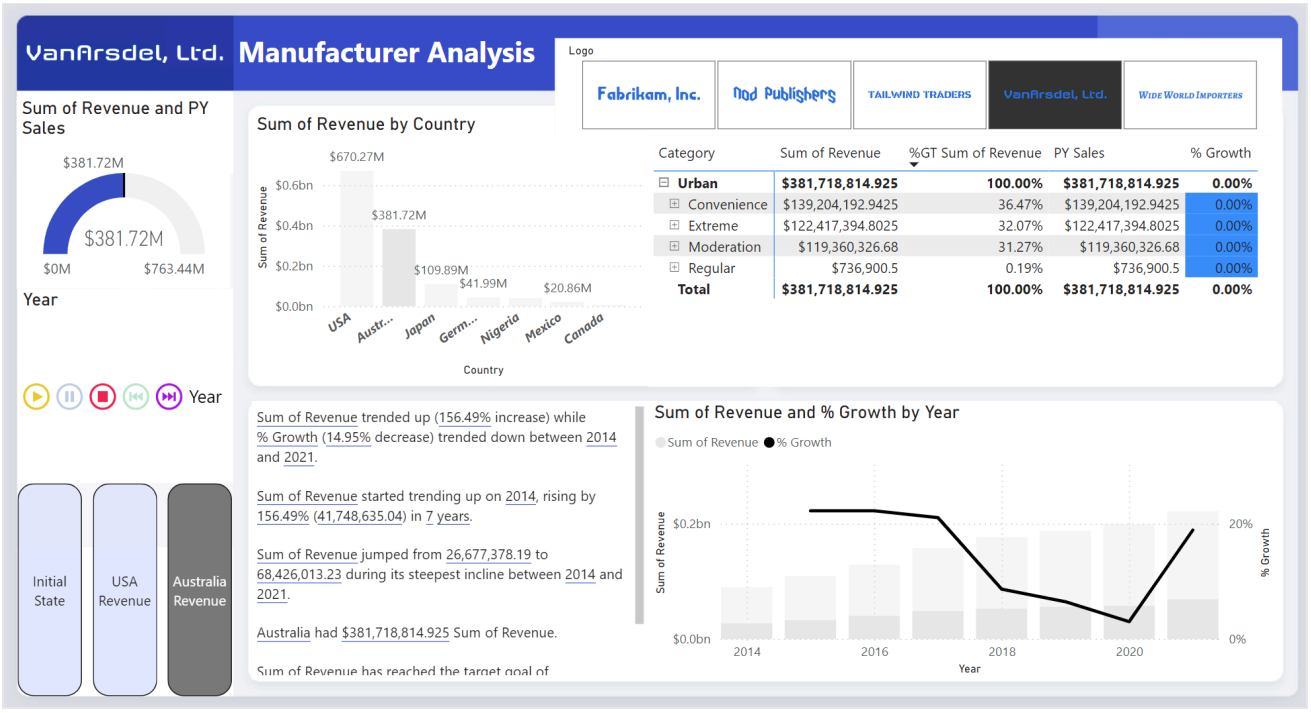


Feel free to test out the new functionality.

8. Using the **Ctrl** key on your keyboard, select the **Australia Revenue** bookmark from the visual. Notice how the data changes within the visuals in the report.

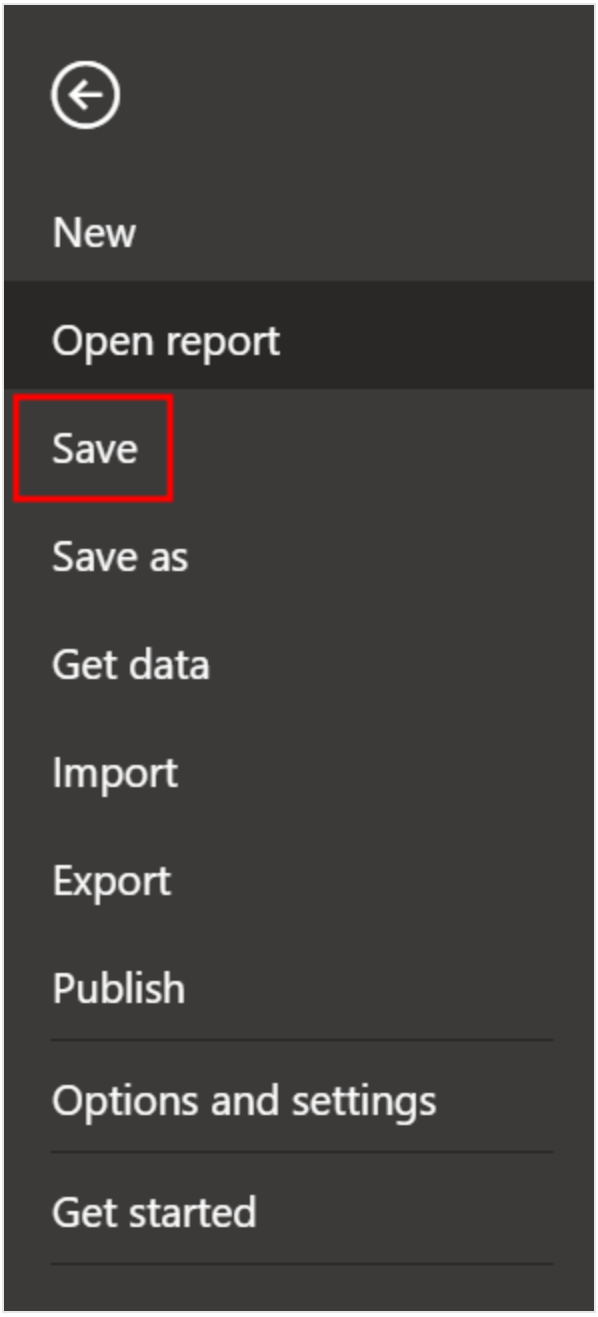
> **Note**
>
> To use the new buttons, you must use CTRL + Select while inside the Power BI Desktop. After publishing the report your end users will simply select the buttons without needing to hold CTRL.

Your report should look like the figure shown below. Now let's finish up by saving the file.



> **Note**
>
> Interacting with the report can significantly change the report's appearance. For example, selecting a year from the **Sum of Revenue and % Growth by Year** will activate the conditional formatting in the matrix.

9. From the ribbon, select the **File** tab.
10. From the menu to the left, select **Save**.



You successfully created a report you can share with your team. The next Module covers creating a dashboard from this report to share with your team. You saw an overview of the functionality in Power BI Desktop. There are many more features for you to explore with your data in the next Modules.

Next unit: Check your knowledge

Continue >

100 XP

Summary

1 minute

During this Module, you completed the report you began in Module 5, and it's ready for publishing on the Power BI Service. In the report, you learned how to import custom visuals and add bookmarks to a report.

Learned concepts:

- Adding a background from a custom image
- How to use Bookmarks and their general forms:
  - Initial state
  - Altered state
  - Spotlights
- Adding a Bookmark Navigator

Module incomplete:

Go back to finish