

Lab Exercise 1: Connecting to Power BI Data

Scenario

You are a business analyst for Adventure Works who will be creating reports in Power BI Desktop using the corporate database stored in SQL Server 2016. You have been given a set of business requirements for data and will now connect to the database from Power BI Desktop. You will publish your report to the Microsoft Power BI portal, and use the reports to create a dashboard.

The main tasks for this exercise are as follows:

- Prepare the Lab Environment
- Connect to SQL Server from the Power BI Desktop
- Add Charts to the Report
- Publish the Report to the Power BI Portal

Task 1: Prepare the Lab Environment

1. Ensure that the MSL-TMG1, 20778A-MIA-DC, and 20778A-MIA-SQL virtual machines are running, and then log on to 20778A-MIA-SQL as ADVENTUREWORKS\Student with the password Pa\$\$w0rd.
2. Run Setup.cmd in the D:\Labfiles\Lab02\Starter folder as Administrator. You may receive a prompt asking whether you want to close SQL SERVER LAUNCHPAD. If so enter Y.
3. If you do not already have a Power BI login, go to <https://powerbi.microsoft.com/en-us/documentation/powerbi-admin-signing-up-for-power-bi-with-a-new-office-365-trial>, and follow the steps to create an account.
4. Download and install the Microsoft Power BI Desktop from <https://www.microsoft.com/en-us/download/details.aspx?id=45331>.

Task 2: Connect to SQL Server from the Power BI Desktop

1. Open the Power BI Desktop application.
2. Connect to MIA-SQL using the Get Data tool in Power BI Desktop.
3. Add the Sales.vSalesPerson data.

4. Add the Sales.vStoreWithDemographics data.
5. Use a query to import data for the top 10 selling products.

Task 3: Add Charts to the Report

1. Add a bar chart to the report to display the year-to-date (YTD) sales for each sales person.
2. Resize the bar chart to display all salespersons.
3. Change the bar color for the three highest sales.
4. Add a pie chart to show the proportion of employees by specialty.
5. Add a bar chart to display the top 10 selling products.
6. Change the top 10 selling products bar to a donut chart.
7. Create a bar chart by dragging a field on to the report canvas.
8. Rename fields in the data sets.
9. Rename the report.
10. Save the report to the local machine.

Task 4: Publish the Report to the Power BI Portal

1. Connect to the Microsoft Power BI portal using your Microsoft account.
2. Publish the report.
3. View the report online to check that it has published correctly.

Results: After this exercise, a report will be published on the Power BI portal.