

## Filtering Lab

All data files are here: <https://github.com/fenago/cts245X/tree/main/CTS2451IntroToPowerBI/Exercises>

### PART 1: Looking at the data

Close any open reports and open the

`4_1_looking_at_the_data.pbix` report from the Exercises folder on the desktop.

- Select the clustered column chart.
- Display the underlying data.

Export the data as a `.csv` file and save it on the desktop.

Open the `.csv` file with Notepad to look at the data.

**What is the last character in the csv file?**

### PART 2: Creating a hierarchy

Navigate to the `DimDate` table in the *Data View*.

Create a hierarchy that starts with `Year`, goes on to the `QuarterFull`, then the `MonthName`, and ends with the `DateKey`.

If the drag functionality isn't working, you can right-click `DimDate`'s `Year` in the *Fields* pane and select "Create hierarchy". From there, you can right-click the necessary fields and select "Add to hierarchy".

Create a hierarchy that starts with `Year`, goes on to the `QuarterFull`, then the `MonthName`, and ends with the `DateKey`.

If the drag functionality isn't working, you can right-click `DimDate`'s `Year` in the *Fields* pane and select "Create hierarchy". From there, you can right-click the necessary fields and select "Add to hierarchy".

Rename the hierarchy to `Date Hierarchy` .

In the column chart on the *Report* view, replace the `ShortMonth` *Axis value* of the column chart by the `Date Hierarchy` .

Use the drill controls in the top right corner of the visual to explore the different levels. Click the single down arrow to enable drill mode.

Which quarter across all years had the highest amount (format example: Y2020 Q1)?

### PART 3: Adding a filter

Close any open reports and open the `4_3_adding_a_filter.pbix` report from the `Exercises` folder on the desktop.

- Open the *Filters* pane.
- Add a filter to the "Actual" card visual that filters on rows where `ScenarioName` is equal to `Actual` .

Add a filter to the "Forecast" card visual that filters on rows where `ScenarioName` is equal to `Forecast` .

Add a filter to the "Budget" card visual that filters on rows where `ScenarioName` is equal to `Budget` .

**Question: What was the total forecasted amount?**

- ☐ 53.64bn
- ☐ 18.34bn
- ☐ 18.13bn
- ☐ 17.17bn

## PART 4: Turning off interactions

Select the "Budget Product Sold" visual.

Go into the interaction editing mode in the *Format* tab at the top of the screen.

Turn off interactions with each of the three cards.

Exit the interaction editing mode.

Select the "TV and Video" bar in the "Budget Product Sold" chart. What is the value of the Budget card?  
(format example: 11.11bn)

## PART 5: Applying advanced filtering

Remove the "Budgeted Monthly Amount" chart to make room.

Add a clustered bar chart to the report, with the `EntityName` on the *Y-axis* and the `Amount` as *X-axis*.

- Go to the filter pane and add a *Top N* filter on `EntityName`.
- Show only the top five stores.

**What is the name of the 5th best performing Contoso store?**

- ☐ Contoso Catalog Store
  - ☐ Contoso North America Online Store
  - ☐ Contoso Asia Online Store
  - ☐ Contoso North America Reseller
- Change the title of the visual to `Top 5 Stores by Sales`.
  - Try to sort the columns in ascending order. Does it make sense visually?