

Exercise: Create an executive dashboard

Introduction

During your Power BI journey, you explored the impact of analytics. In this exercise, you'll practice your analytics knowledge by curating data.

By completing this exercise, you'll demonstrate your ability to:

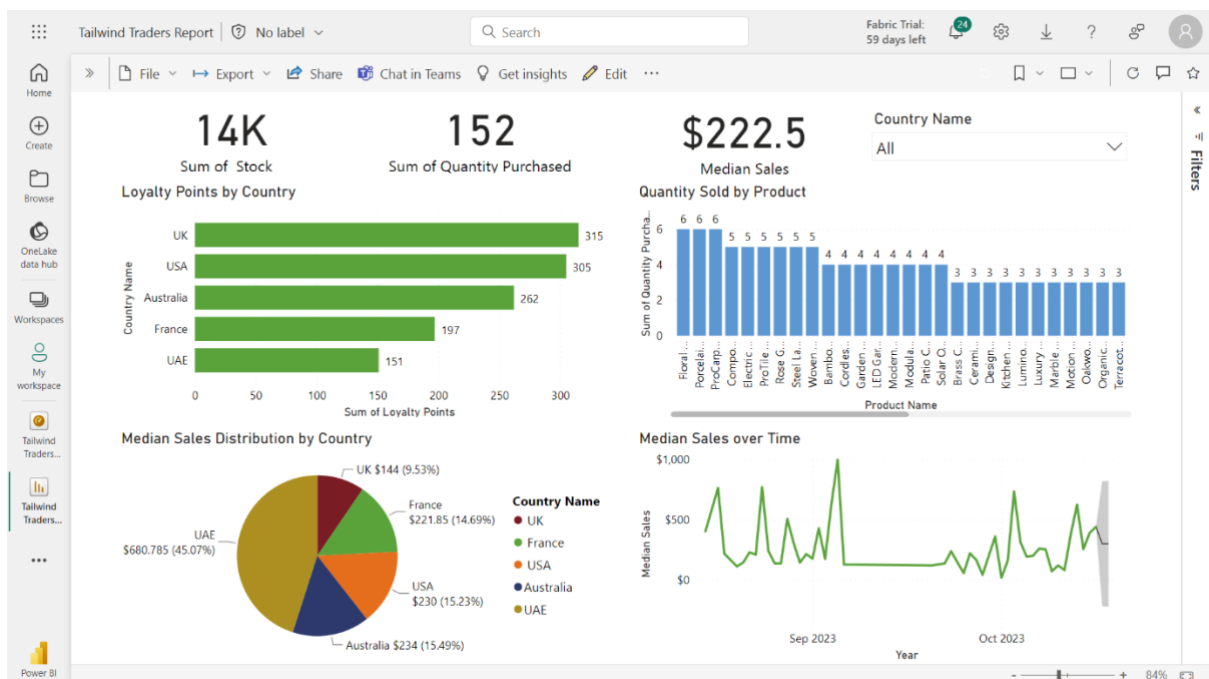
- Create an executive dashboard in Power BI to curate data efficiently.
- Display sales summaries focusing on product quantities and median sales trends.
- Highlight profit metrics, emphasizing net revenue and Yearly Profit Margin by country.
- Use card visualizations for quick insights.
- Ensure the dashboard is mobile-friendly, making important data accessible.

Case study

Tailwind Traders requires your help creating an executive Power BI dashboard that the company can use to generate insights into its global performance. The dashboard needs to present global sales and profit data efficiently. It must also be accessible on mobile devices.

Instructions

Locate and open the **Tailwind Traders Report.pbix** Power BI file you have created in the previous exercise and follow the prompts below to complete the exercise.



Step 1: Create a new dashboard

1. Navigate to your workspace and create a new dashboard called **Tailwind Traders Executive Dashboard**.

Step 2: Pin the Sales Overview core visualizations

1. Navigate to your Workspace and access the **Sales Overview** tab of the **Tailwind Traders Report**.

2. Pin the following visuals to the **Tailwind Traders Executive Dashboard**:

- **Loyalty Points by Country** bar chart
- **Quantity Sold by Product** column chart
- **Median Sales Distribution by Country** pie chart
- **Media Sales Over Time** line chart

Step 3: Pin the Sales Overview card visualizations

1. Locate and pin the following **Sales Overview** card visualizations to the **Tailwind Traders** dashboard:

- **Sum of Stock** card
- **Sum of Quantity Purchased** card
- **Median sales** card

Step 4: Pin the Profit Overview core visualizations

1. Select the **Profit Overview** tab.

2. Locate and pin the following **Profit Overview** core visualization to the **Tailwind Traders Executive Dashboard**:

- **Net Revenue by Product** bar chart
- **Yearly Profit Margin by Country** donut chart
- **Year Profit Margin over Time** area chart

3. Note the product with the highest value in the **Net Revenue by Product** bar chart.

Step 5: Pin the Profit Overview card and KPI visualizations

1. Locate and pin the following items to the **Tailwind Traders Executive Dashboard**:

- **YTD Profit** card
- **Sum of Net Revenue USD** card
- **Sum of Gross Revenue USD** KPI

Step 6: Configure the Mobile View for the cards and the KP Ivisuals

1. Locate and select the **Tailwind Traders Executive Dashboard** from the **Dashboards** list.

2. Select **Mobile Layout** from the **Edit** menu and pin your card visuals to the dashboard in the following order:

- **Sum of Net Revenue USD** to the left and **Sum of Quantity Purchased** cards to the right.
- **Median Sales** to the left and **YTD Profit** cards to the right.
- **Sum of Gross Revenue USD** KPI across the full width of the layout

Step 7: Configure the Mobile View for the core visualizations

1. Configure the mobile view for the core visualizations by pinning the **Sales Overview** visualizations in the following order:

- **Loyalty Points by Country** bar chart
- **Quantity Sold by Product** column chart
- **Median Sales Distribution by Country** pie chart
- **Median Sales over Time** line chart

2. Pin the following **Profit Overview** visualizations in the following order:

- **Net Revenue by Product** bar chart
- **Yearly Profit Margin by Country** donut chart
- **Yearly Profit Margin over Time** area chart

Conclusion

Having completed the assigned tasks, you have demonstrated that you possess the skills to curate visuals for an executive dashboard.