

# Hands-On Walkthrough 1

*Create a Power BI Report*

# Chapter 1. Get Started

1. Start Power BI
2. Select **Blank Report**

## 1.1. Load Sample Data

1. Select **Use sample data** (in the center of the screen)
2. Select **Load sample data**. Do not launch the tutorial.

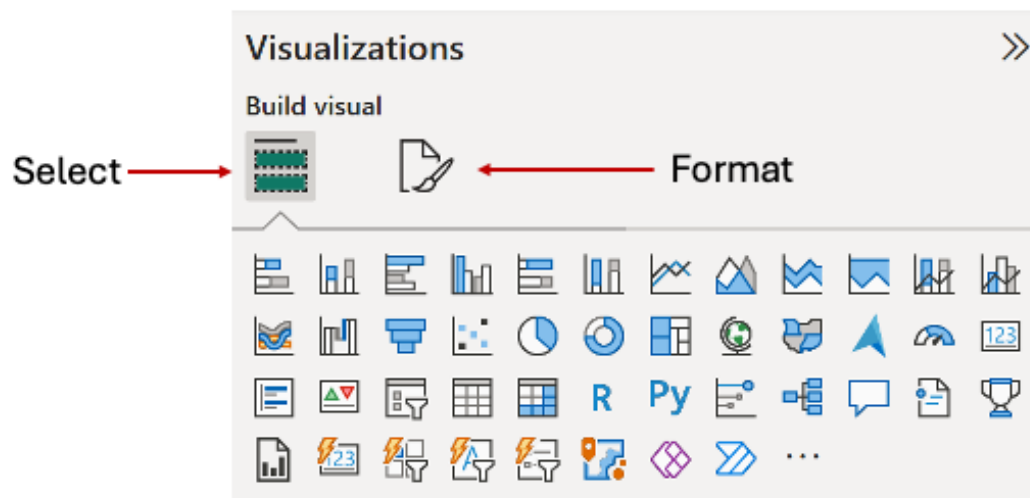
**NOTE** | The system may take a minute to 'find' the data.

3. In the **Navigator** window, place fill the checkbox next to financials.
4. Press **Load** at the bottom of the **Navigator** window.

**NOTE** | The system may take a minute to 'load' the data.

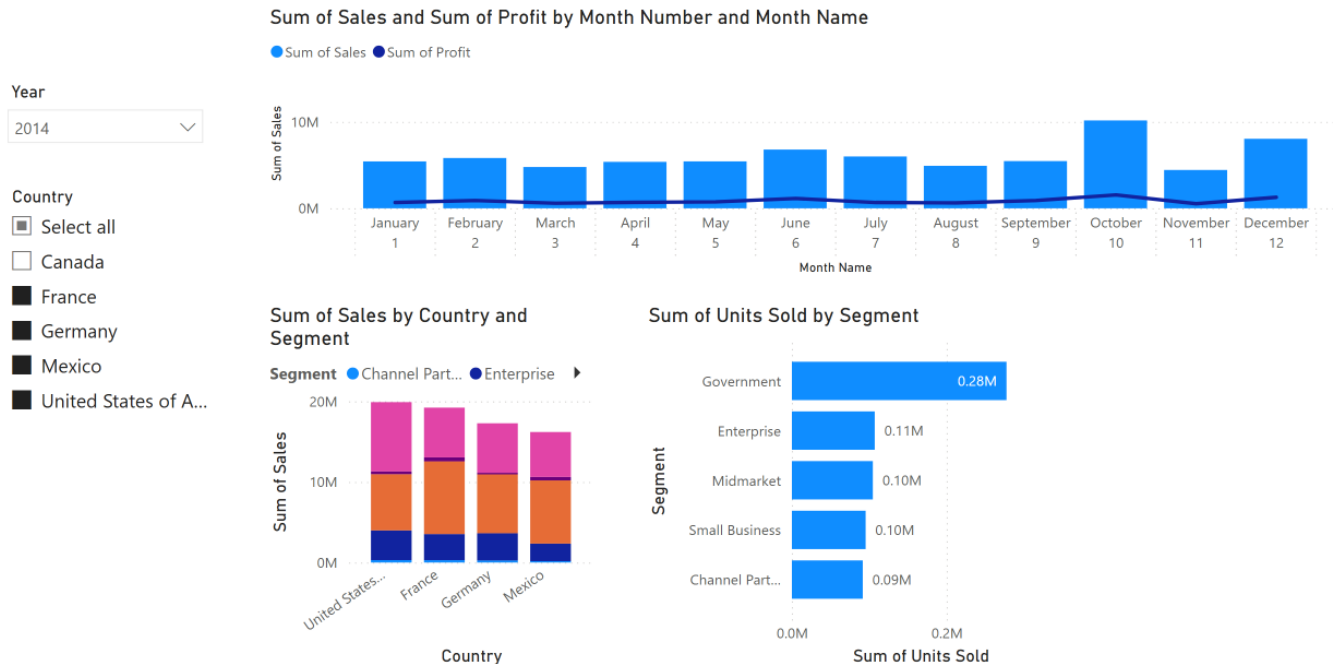
5. On the right-hand side of the Power BI window, in the **Data** panel is the financials data available for reports.

## Chapter 2. Visualization Icons



# Chapter 3. Design the Main Page

When finished, the **Main Page** will resemble the following:



1. In Power BI Desktop, rename **Page 1** to **Main**.
2. Add a **Slicer** visual and drag **Financials** | **Year** (the field, not the year in date hierarchy) to the slicer's **Field** well.
3. In **Format visual** » **Slicer settings**, set **Option** → **Style** to **Dropdown**. Resize it beneath the logo.
4. Set **Selection** → set **Show "Select All" option** to **On**.
5. Resize the slicer to fit.
6. Open the **Year** dropdown and select **FY2014**; collapse it.
7. Add a **Line and Stacked Column Chart** to the right; stretch across the page.
  - a. X-axis: **Month Number** and **Month Name**
  - b. Column y-axis: **Sales**. Notice the slight name change in the well.
  - c. Line y-axis: **Profit**
  - d. In the **Data** pane, highlight (click) on **Month Name**. The **Column tools** will be displayed above the report. Use the **Sort by column** dropdown. Select **Month Number**. This will sort the name by the number.
8. Enable empty-month display: in the X-axis field well menu for **Month**, Right-mouse → select

**Show items with no data.**

9. Add a **Stacked Column Chart** beneath the combo chart, left half.

a. X-axis: **Country**

b. Y-axis: **Sales**

c. Legend: **Segment**

10. Add a **Stacked Bar Chart** (Horizontal) on the right.

a. Y-axis: **Segment**

b. X-axis: **Units Sold**

c. Format: turn **Data labels** = **On**.

11. Save the file as Walkthrough-1 Create a Report.

**TIP**

Dropdown slicers conserve canvas space and pair well with synced slicers across pages.

“Show items with no data” surfaces structural gaps like zero-sales months that would otherwise disappear.

**NOTE**

This example uses **Month Number** to sort **Month Name** in chronological order. If **Month Number** was not part of the dataset, it can be created with DAX or Power Query. These options will be discussed later.

# Chapter 4. Design Page 2 (Profit)

When finished, the page will resemble:

Country	Year	Sum of Gross Sales	Sum of Discounts	Sum of Sales	Sum of Profit	Sum of Units Sold
<input checked="" type="checkbox"/> Select all	2014	77,994,034	5,394,705	72,599,328.65	10,289,681	675,994.50
<input type="checkbox"/> Canada	Qtr 1	17,297,942	1,285,344	16,012,597.97	2,159,306	141,936.00
<input checked="" type="checkbox"/> France	Qtr 2	18,820,567	1,230,171	17,590,395.93	2,579,251	185,729.00
<input checked="" type="checkbox"/> Germany	Qtr 3	17,684,890	1,318,890	16,365,999.91	2,196,029	151,880.50
<input checked="" type="checkbox"/> Mexico	Qtr 4	24,190,636	1,560,301	22,630,334.84	3,355,094	196,449.00
<input checked="" type="checkbox"/> United States of America	Total	77,994,034	5,394,705	72,599,328.65	10,289,681	675,994.50

1. Add a new page; rename it **Profit**.
2. Add a **Slicer** for **Country**; enable **Select all** in **Slicer settings » Selection**.
3. Add a **Slicer** for **Year**; enable **Select all**.
4. Place the slicers on the left, ~half page height.
5. Add a **Matrix** visual to fill the remaining space.
6. Add **Year, Quarter, Month, Day** from Date hierarchy to **Rows**.
7. Add the following data to **Values: Gross Sales, Discounts, Sales, Profit, Units Sold**.
8. Save the file.

Use a matrix when totals, drill, and hierarchical time (fiscal) are important to your story.

The Matrix visualization can also be used more traditionally to show time on the rows and the unique values of a column (e.g., Country) as columns.

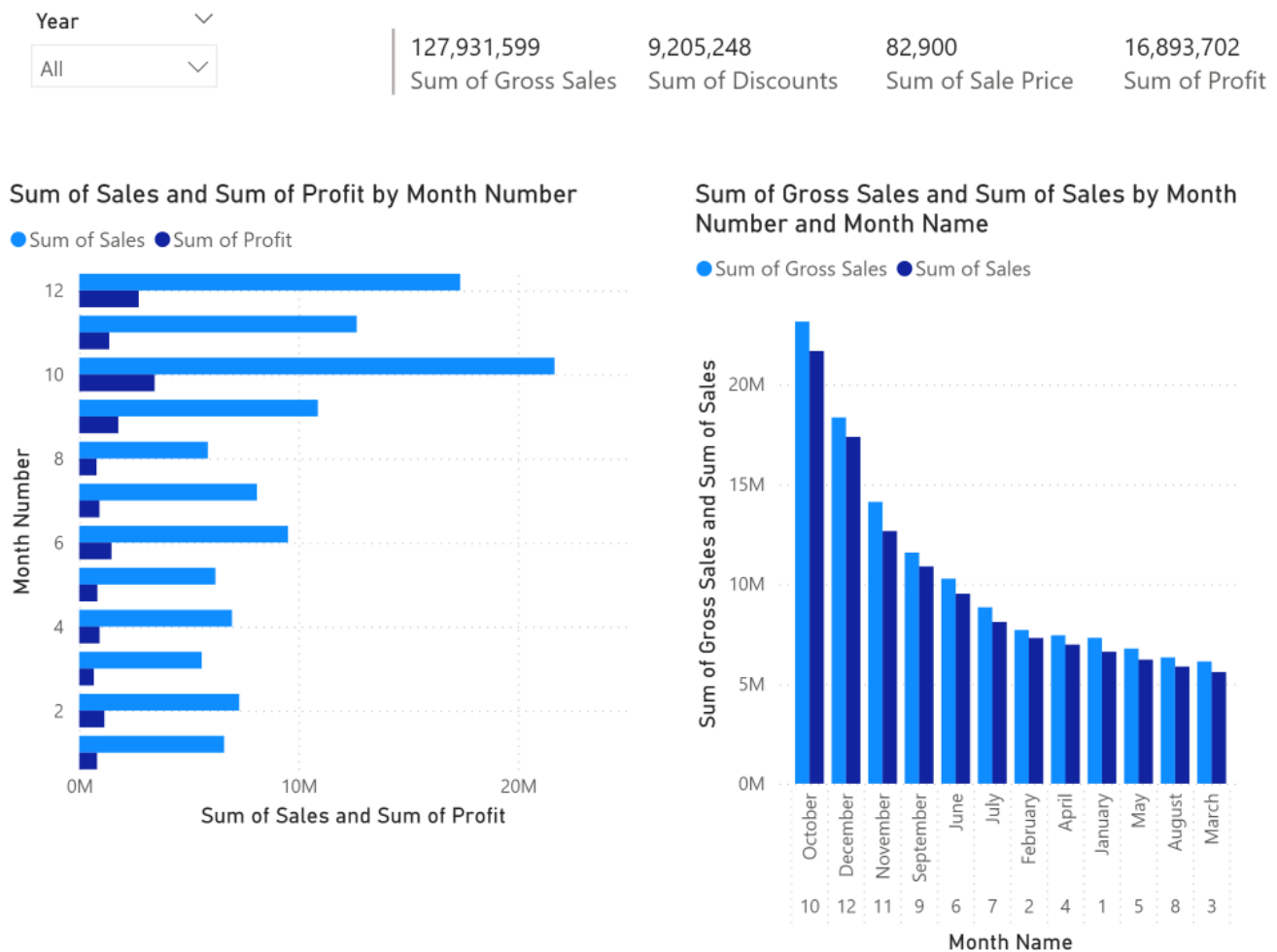
## NOTE

Year	Canada	France	Germany	Mexico	United States of America	Total
2013	5,175,888.78	5,132,795.17	6,227,735.47	4,754,421.26	5,124,414.83	26,415,255.51
2014	19,711,766.10	19,221,377.11	17,277,605.35	16,194,930.85	19,905,415.34	92,311,094.75
Total	24,887,654.89	24,354,172.28	23,505,340.82	20,949,352.11	25,029,830.17	118,726,350.26

Moving slicer-like options to the Filters pane frees canvas space and enables more advanced criteria than slicers provide.

## Chapter 5. Design Page 3 (Performance)

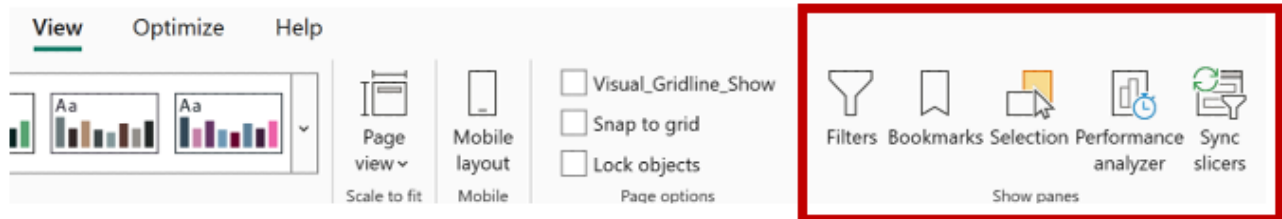
When finished, the page will resemble:



1. Add a new page; rename it **Performance**.
2. Add a **Slicer** for **Year**; enable **Select all**.
3. Add a **Multi-row Card** to the top of the page. Add: **Sales | Sales, Targets | Target, Targets | Variance, Targets | Variance Margin**.
4. Format the card: callout size ~28 pt; apply a light background.
5. Add a **Clustered Bar Chart** beneath the card, left half. Y-axis: **Date | Month**; X-axis: **Sales | Sales, Targets | Target**.
6. Copy the visual; type to the right; switch to **Clustered Column Chart**.

## Chapter 6. Sync Slicers

1. On **Main**, set the **Year** slicer to **FY2014**.
2. On **Performance**, notice the **Year** slicer does not match.
3. Return to **Main**, select the **Year** slicer, open **Sync Slicers** (View » Show Panes).



4. In **Sync Slicers**, under **sync**, check **Main** and **My Performance**.
5. Test by changing values and confirming synced slicers match across pages; close the pane.

### NOTE

Unsynced slicers create conflicting contexts across pages and can mislead readers.

### TIP

Only sync truly global filters (Year, Region). Keep study-specific filters local to reduce noise.



## Chapter 7. Using a Bookmark

1. On **Main**, set the **Year** slicer to **FY2014**.
2. From the menu bar, select **View** → **Bookmarks**.
  - a. This will permit returning to the 'Bookmarked' status even if filters change.