

Lab 7 Visualizing Data in Power BI Desktop

Time: 30 min

Objectives

The Vice President of Sales for Power Cycles has requested that you create a dashboard that summarizes the company's performance for 2019. It should also be intuitive with a focus on gaining insight into product sales in relation to location and product types.

Design elements required.

1. Multi-card headliner showing Total Sales, Sales Target, Variance, Variance%
2. Create a decomposition tree visual that will provide an analysis of key sales drivers with the following fields

Explain By

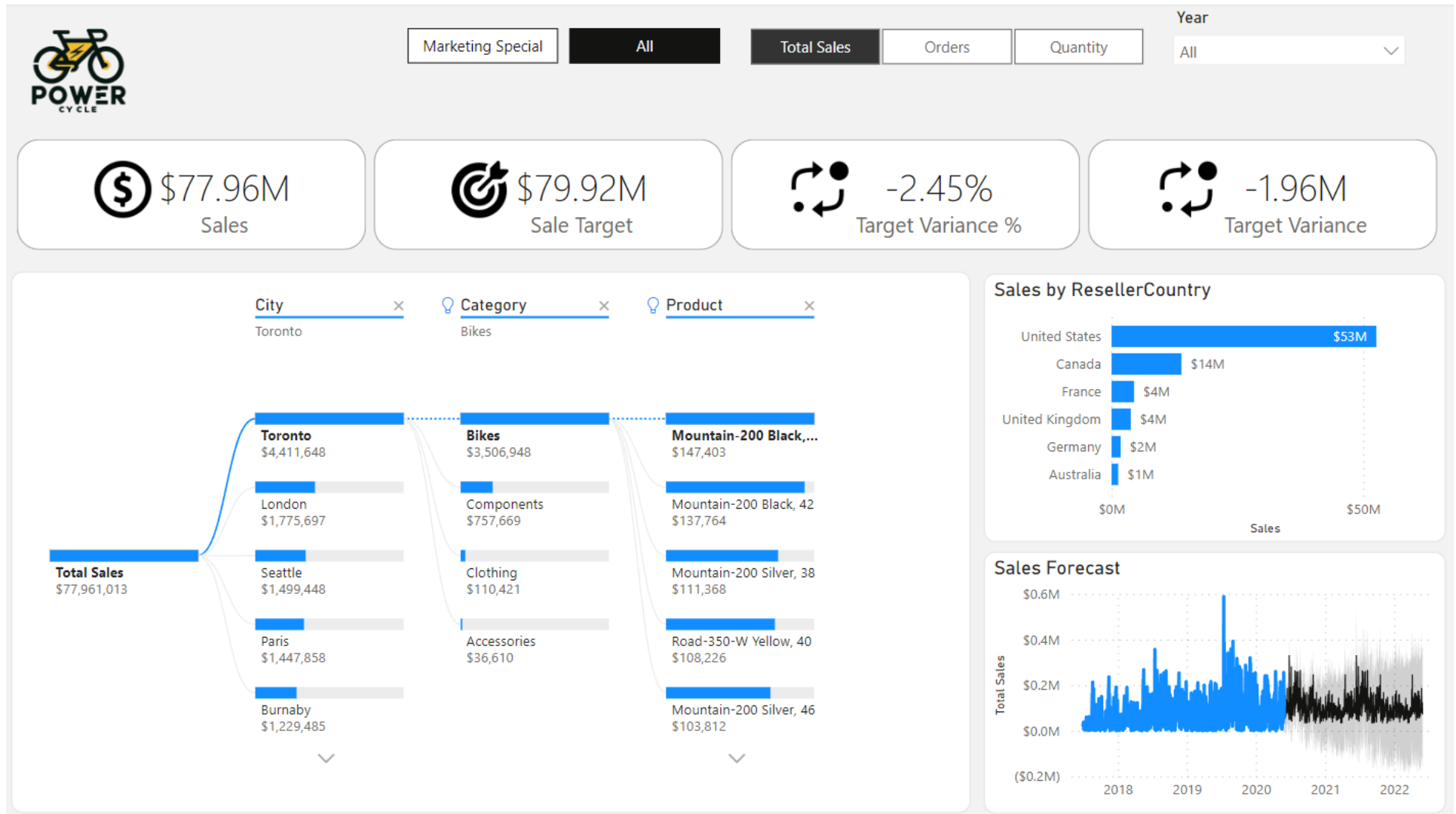
- a. City
- b. Category
- c. Product

Analyze By

Create a field parameter for Total Sales and Quantity so that the report users can toggle between the two measures

3. Create a Clustered Bar chart visual that shows sales by reseller country with a hierarchy of country and state
4. Create a custom tooltip page using a table and card visual showing the total sales and the top 10 resellers and their sales
5. Create a bookmark that highlights the key marketing months of June, July and August.
6. Create a 2-year sales forecast projection using previous years data

7. Add the Power Cycle Logo to the report page

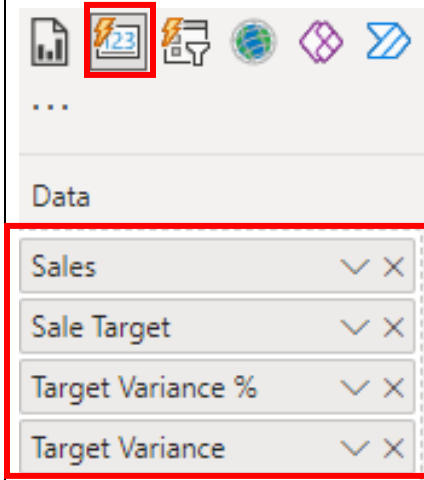
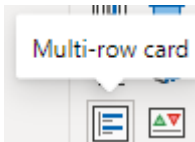


Lab Steps

1. Multi-card Headliner

- Select the card visual from the visualization panel and place the following measures into the field section

****Please note that if your current version of Power BI desktop does not have the updated card visual you can use the Multi-row visual instead however icons will not work in this visual.**



- Add the icons to the cards and format them accordingly

- Navigate to the format your visual option and select the series that you would like to apply the icon before selecting the image


- Repeat this step to add other icons after changing the series accordingly


\$32.51M
Sales


\$34M
Sale Target


-1.49M
Variance

-0.04
Variance %

 \$32.51M
Sales

 \$34M
Sale Target

 -1.49M
Variance

 -0.04
Variance %

▼ Cards

Apply settings to

Series
Sales ▼

> Padding

> Fill On ●

> Border On ●

> Shadow Off ●

> Glow Off ●

▼ Image On ●

Image type
Image ▼

Sales.png ✕

Image fit
Fit ▼

2. Create a Decomposition tree to analyze key product sales drivers.

Select the decomposition visual in the visualization panel

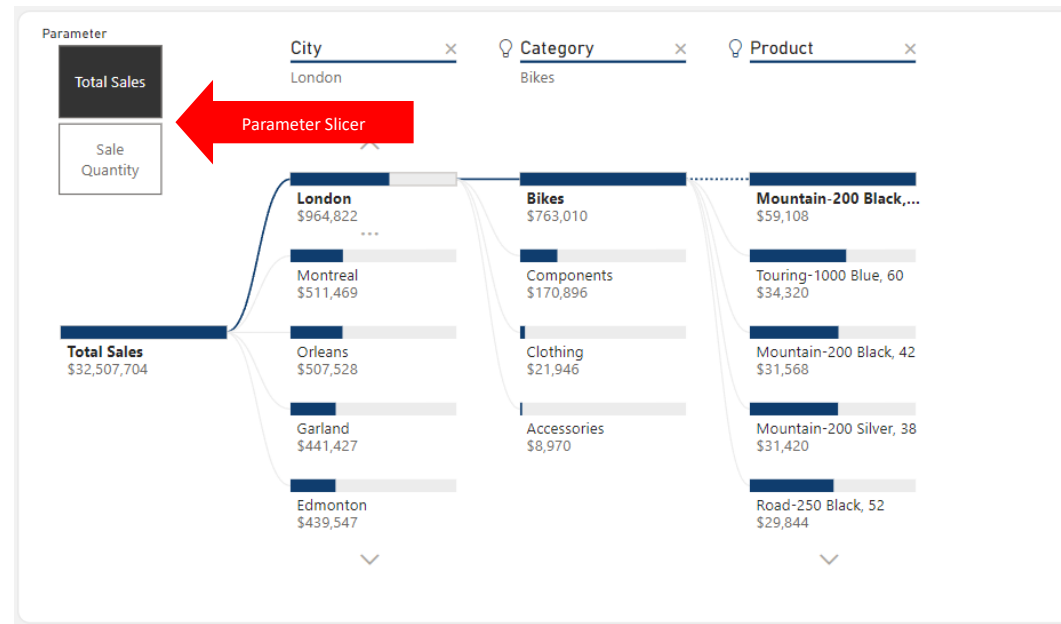


Explain By Input

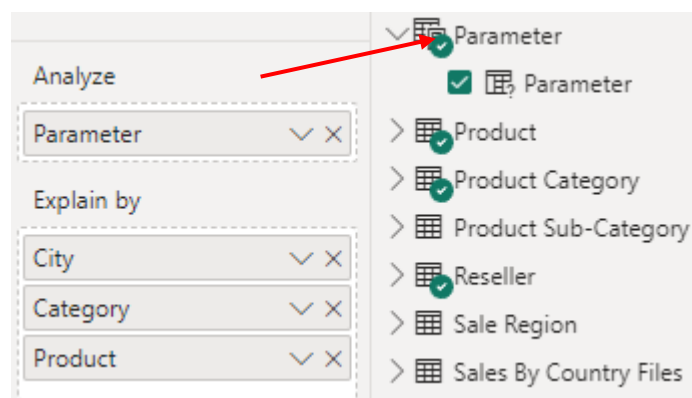
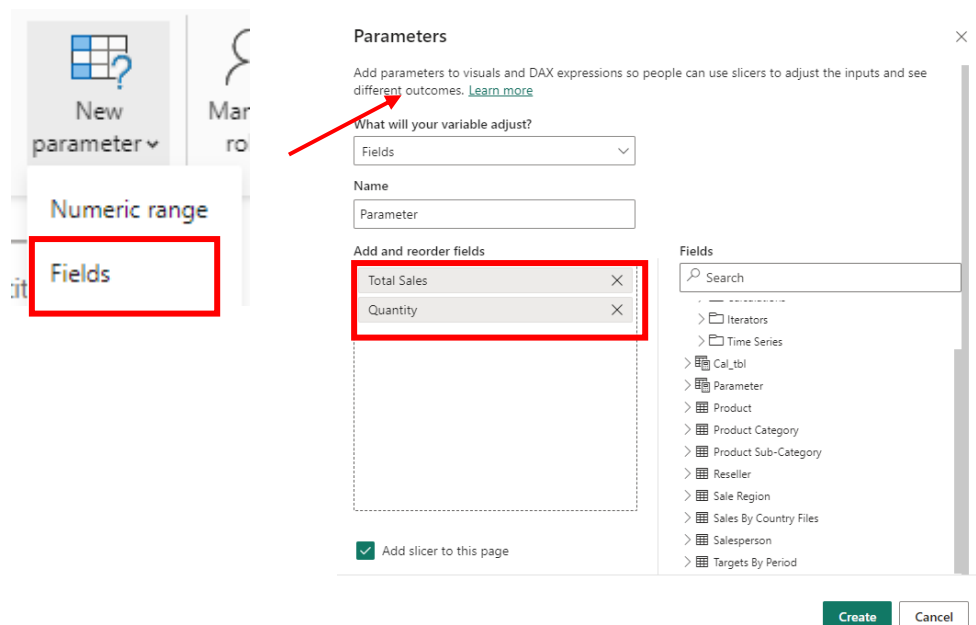
- City
- Category
- Product

Analyze By Input

- Use the Total Sales and Quantity parameters created in the next step



- Create a Field Parameter to include the Total Sales and Sales Quantity
- From the modelling tab select New parameter -> Fields
- Add the Total sales and Quantity measure to the field list
- Add the slice to the report
- Add the new parameter field from the data view into the Analyze input of the decomposition tree visual



3. Create a Clustered Bar chart visual that shows sales by reseller country with a hierarchy of country and state

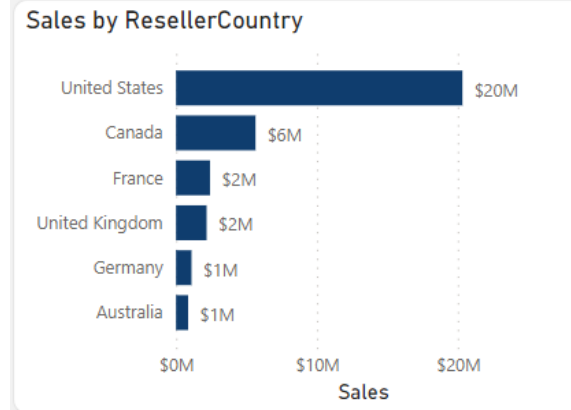
Y-axis

ResellerCountry

State

X-axis

Sales



4. Create a Sales line chart with forecast analysis

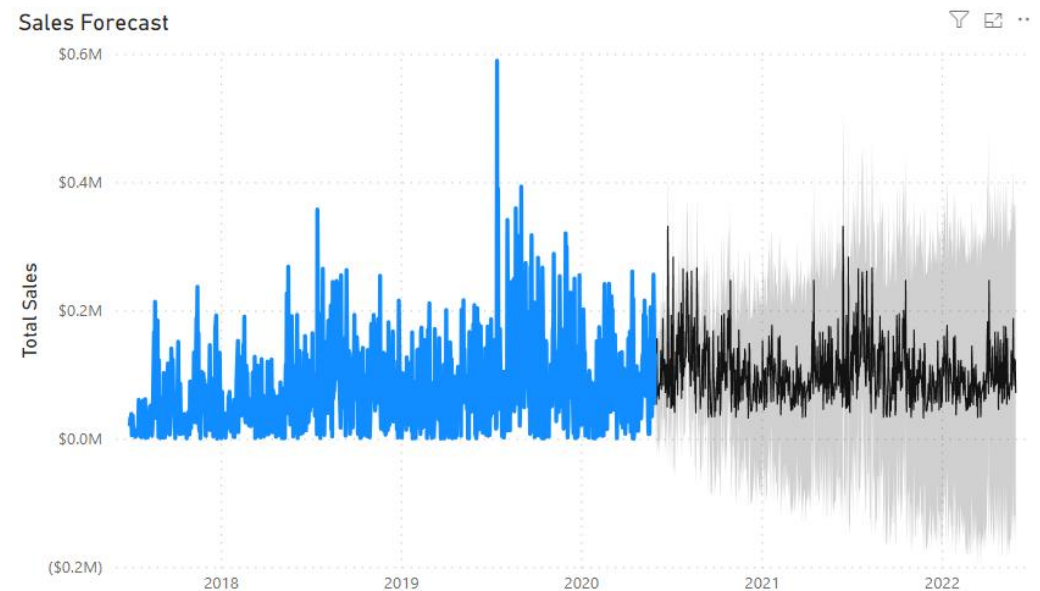
- Place a line chart visual on the canvas with the Date field from the Cal_tbl into the X-axis input and the Total sales into the Y-axis

X-axis

Date

Y-axis

Total Sales



Visualizations

Build visual

Visual icons: Bar chart, Line chart, Pie chart

- To add the forecast feature select the analysis option from the visualization panel
- You will need to set the forecast units to Year with a forecast length of 2.

- The confidence interval should be set to a conservative 80%

Forecast On

Options

Units ⓘ
Years

Forecast length
2

Ignore the last
0

Seasonality
Auto Points

Confidence interval
80%

Apply

5. Create a custom tooltip showcasing the top 10 resellers and their sales.

- Create a new page titled Tooltip
- You will need to use a table visual with the Reseller and Total Sales measure added
- Add a Multi Row card visual and add the total sales measure
- From the visualization section in the page information toggle the “Allow use as tooltip” to on
- Change the canvas setting type to custom with the height set to 315px and the Width to 400px

Top 10 Resellers	
Reseller	Total Sales
Brakes and Gears	\$894,483
Corner Bicycle Supply	\$733,567
Excellent Riding Supplies	\$770,290
Fitness Toy Store	\$731,473
Friendly Bike Shop	\$1,126,700
Health Spa, Limited	\$733,410
Retail Mall	\$804,631
Thorough Parts and Repair Services	\$740,871
Totes & Baskets Company	\$813,553
Vigorous Exercise Company	\$860,054
Total	\$8,209,032

Textbox

Multi Row Card Visual (Total Sales Measure)

Table visual with
top 10 filter
applied

Page information

Name
Tooltip

Allow use as tooltip ☒

Allow Q&A ☐

Reset to default

Canvas settings

Type
Custom

Height
315 px

Width
400 px

Vertical alignment
Top

Filters

Search

Filters on this visual

Reseller
top 10 by Total Sales

Filter type
Top N

Show items
Top 10

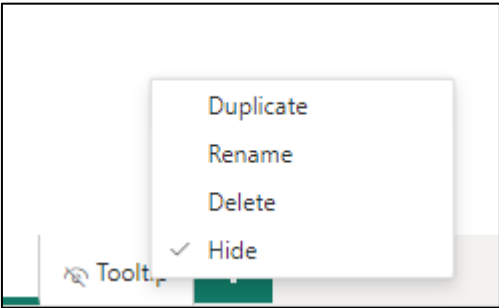
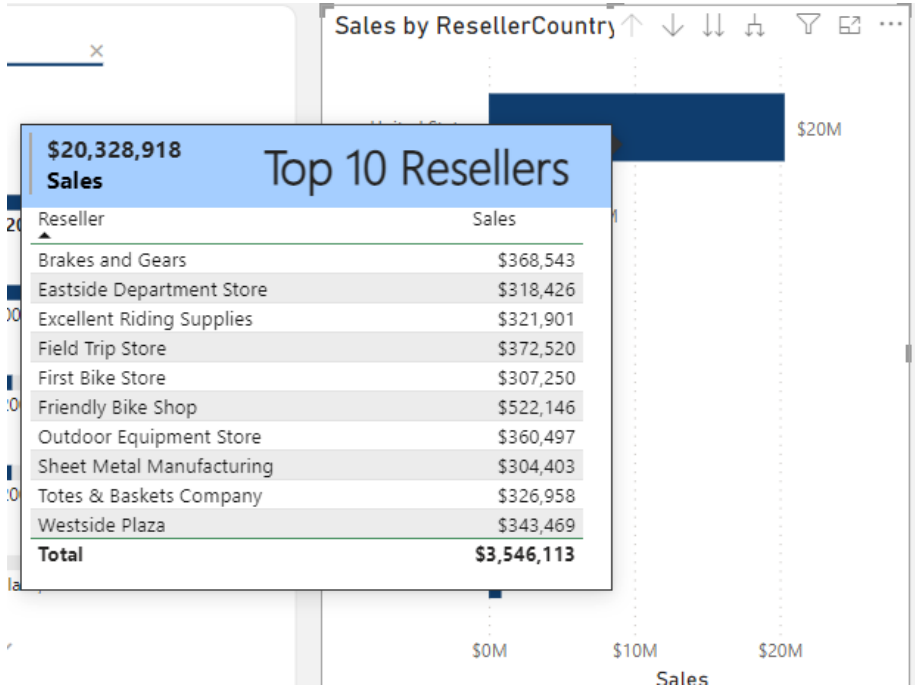
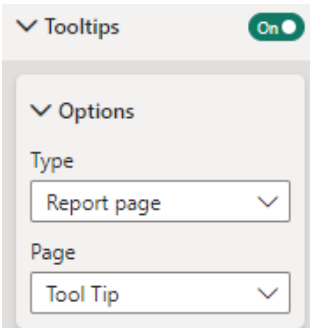
By value
Total Sales

Apply filter

From the main report page select the Sales by Reseller Country bar chart visual and in the format your visual section change the tooltip options from the default type to Report page selecting the Tool tip report page

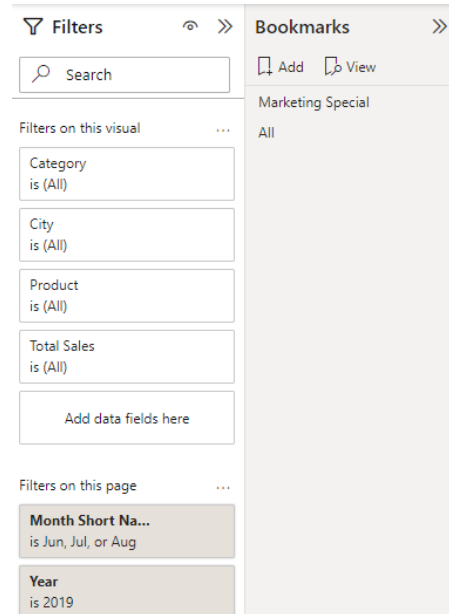
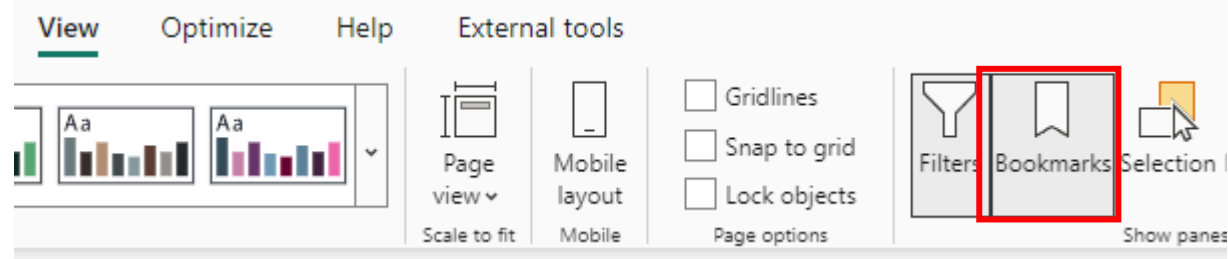
When you hover on the Reseller Country you will now see the custom tooltip in context to the bar

It is recommended that custom tooltip pages be hidden. To do this simply right-click on the page tab and select Hide



1. Create a bookmark for Special buy Months

- From the view tab enable the bookmark pane
- Set a page-level filter for the “Marketing Special” months of June, July, August of 2019
- Add a new bookmark and label it “Marketing Special” Then create another bookmark to return to the normal unfiltered view labeling it “All”.



- From the insert menu tab select insert and add a bookmark navigator and place it at the top of the report page

