

* Loading Excel data to
Power BI *

Open Power BI



Home : Get Data click here



From Excel workbook



select your excel file



open



enable all the tables



Load

Transform
Data

directly load as
it as data

select it if
your data needs
clean up

Power Query

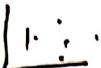
★ Power Query window :-

- manipulate the data
- change the data portion of your input
- combine multiple tables into one

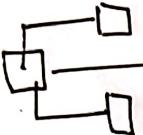
Here, we'll load

Note:- if you are bringing multiple tables you need to perform an important step
↓
Data modeling
↓
To see how these tables are connected to each other
(relationship b/w them)

At the left corner of your screen

(i)  :> Visual / Canvas Area

(ii)  :> Table View

(iii)  :> Model View

Note,

Go to Model View



You can see 4 tables



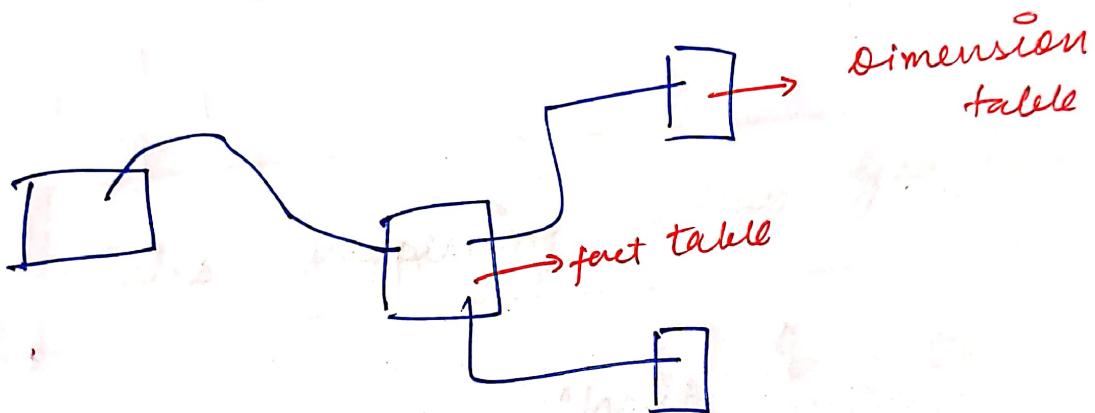
* By default, Power BI makes connection b/w 2 table based on same column name

* if some connections are missing,

make it by dragging column from 1 table to another column of another table

→ This will make connection b/w 2 tables on that basis of Column

* Star Schema Modelling *



1 Table is connected to other tables with + in the center

fact table \Rightarrow central table
 \rightarrow it contains all facts or numbers

dimension table \Rightarrow outer table
 \rightarrow they provide the information in a specific dimension

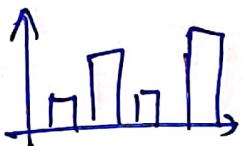
e.g.: People table \Rightarrow People Dimensions

↓
Go back to Visuals

↓
You'll see all 4 table in
"Field Panel"

Sales happening within geography

Insert column chart



Add: Geo to axis

Add: Amount to Values
(By dragging them)



Select the graph ↴

↓
Visual Panel

↓
Zoom at

↓

9 size

→ increase text size of
x-y label

Amount - Team Graph

To have same font size of prev. graph

↓
just copy the graph

↓

(ctrl + v)

↓

we'll get duplicate graph

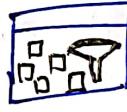
↓

Remove : Geography on Axis

Add : Teams on Axis

- Note :- → everything is interactive
- By default the visuals are interactive
 - if you touch something, other visual will respond by automatically filtering down to the selected position, then highlight the filtered values.

Add Category as slice

Insert slice :- 

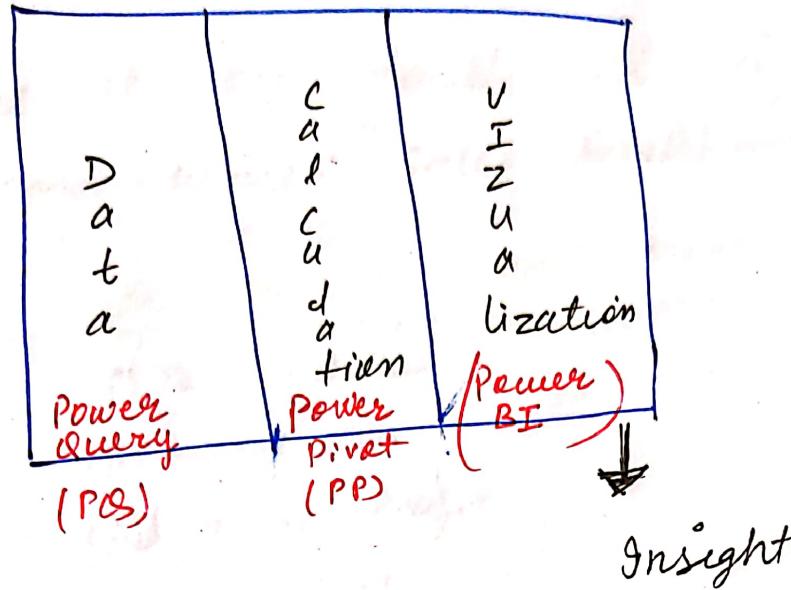
Add Category to fields

g.size

↓
increase the text size

Note:-

My
Data →
flows
through



- # To Unselect : Tap there once again
- # we can select any graph from canvas area and make it switch to other chart present on visual Panel by just clicking on it .
- # You can also format colour as suggested prev . just select graph ↓ visual panel : front so as per your choice

Now, add a new page and rename it by double clicking on it and write : "Sales Dashboard".

Here, we have to add measures

(i) Total Sales

(ii) Total Cost

(iii) Total Profit

(iv) Profit %

(v) Total Customers

(vi) Sales per Customer

Add Measures (DAX)

How to add measure

Go to Field Panel

↓

right click : sales table

↓
New Measure

↓

measures box appears on

the top of canvas

area.

measure
appears as ↗

tiny little
calculator
symbol
next to
measure name

1. Total Amount = sum(sales [Amount])

Format : Ribbons

↓
set : currency, ,00 separator ...

Calculating Total Cost

{ Inserting cost column in our sales table } open data Table Tools View
Sales Table : click & open
Tables Tools : Ribbons
↓
New Column
↓
 1. Cost = [Boxes] * Related (products [cost per box])

Now, calculating our total Cost :=>
↓
Go to field panel

↓
Right click : Sales table

↓
new measure

↓
 1. Total Cost = sum (Sales [Cost])

↓
Format :> currency . . .

* Note:- we can insert measure in
any table →
the way we write the measure
they're fairly naked

↓
so it doesn't really matter
where the measure is present
it will still calculate the
same value.

* Add Another Measure :-

Total Profit = [Total Amount] - [Total Cost]
↓
set formatting

* Add Another Measure :-

Profit % = Divide ([Total Profit],
[Total Amount])
↓

format : → Percentage
(measure tools)

Note,

Insert a table in canvas area



Add : → Category

→ Total Amount

→ Total Cost

→ Total Profit

→ Profit %.



Increase the text size
[Visual : font : (size)]

Add a fictional profit indicator

→ if $\text{Profit \%} > 50 \rightarrow \text{thumbs up}$
else $\rightarrow \text{thumbs down}$

Add new measure



✓ Profit Target met? = if ($[\text{Profit \%}] > 0.5$,
"B", "E")

* To bring emoji



Press : Windows
Key + ○

Add New Page

as "DashBoard"



name it

Dash-Board



Insert a Card :>

(to show single No.)



Resiz it



Select : Total Amount by clicking
on it after selecting the
card (or) Put Total Amount
in field

Now, Apply formatting :

Select the card

↓
visual Panel

↓
Font

↓

i) Background colour → colour

ii) Data level :> font size,
bold

iii) Change colour of text

Once your card visual is ready

↓
(ctrl + C) & then (ctrl + V)

↓
move them ; Power BI will
show proper alignment

↓
copy it 4 times & arrange
one under another.

e.g:

- 1.
- 2.
- 3.
- 4.

① Add : → to field section

1. Total Amount
2. Total Cost
3. Total Profit
4. Profit %

Now, we can add 1 decimal point for
more accuracy.

Select & do individually for
all 4 card visuals.

select card



visual : Font



Data label



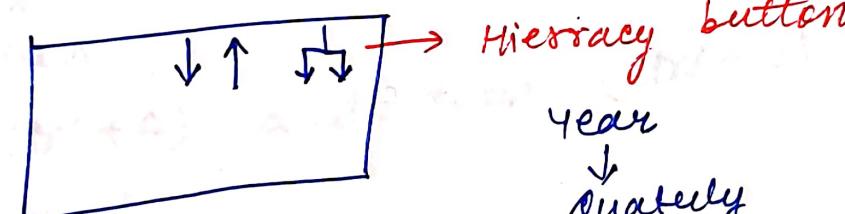
value decimal point

(20) Inserting Area chart for Card Visuals

Insert Area chart : 

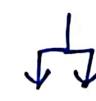


Put : Date on "Axis"
Put : Total Amount on "Values"



By default it will show date at year level & small slot is shown in your Area chart



click :  (2 times)



we have : Monthly breakdown report

Resize it small and place
in front of its card visuals



do I formatting:



Turn off title of area chart

Now,

once your area chart is ready

then

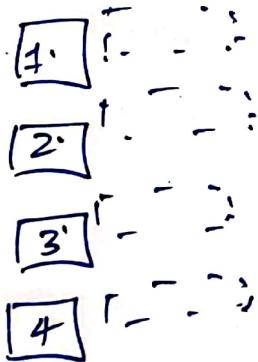
(ctrl + c) and then (ctrl + v)



move them & resize and make
or place in front of each 4 cards



Align it
properly



2. drop total Amount &
select Total Cost

3. drop total Amount &
select profit

4. drop Total Amount &
select Profit %.

{30} Insert a Table

Insert a Table (Visual Panel)



Add :> Sales Person

→ Picture

→ Total Profit

→ Profit %

→ Profit Target met?

Note:-

In Picture column, you'll see necessity

To place ↓ picture here

Go to Data View (left - mid)

↓
click : People table

↓
select : Picture column

↓
Column Tools : Ribbon

↓
Data category : Image URL

↓

This will now show the image
of the people in table present
in canvas Area

Adjust formatting to Table :

Select the table from canvas Area

↓
visual Panel

↓

Font

↓

- i) Total : Total off
- ii) Grid : Image height (set)
- iii) Resize Text size
- iv) Add colour & background to
headers & columns
- v) Apply sort order (desc.)

Add Team as Slicer

Insert Slicer :- 

↓
Add: Team to "field"

↓
Resize it & place it on
the top

Ques)
Can you select more than one item &
move them all together?

sol) (i) hold (ctrl) key
↓
select the items (multiple)
↓
drag them (move them)

(ii) select all items
↓
right click
↓
group → as 1 object

They are still individual charts
but they come in 1 group

↓
And we can move them all
together freely. (at + go)

④ we can also do combine formatting
by selecting them, and doing
formatting.

New,

insert 1 more visual card
↓
Add customers
↓
select prev. card
↓
Home : Format Painter
↓
click on new wala card
↓
it will apply the same
formatting Rule

But, it won't match the size

{40} Formattings

Select table in canvas Area

(a)

↓
Select table

↓
visual panel

↓
Total Profit

↑ click here

↓
conditional formatting

↓
Data Bars

↓
set up colour as your needs

↓
OK

(b) make your Table small

↓
✓ Resize it as a whole

↓
✓ Resize the column (like regular table)

↓
we can reduce the size of
heading

e.g. \Rightarrow column \Rightarrow Profit Target met?

is too long

↓
Replace it by small name

↓
Select table

↓
Visual Panel

↓
visual fields bucket

↓
double click : Profit Target met?

↓
Type a small heading \Rightarrow "?"

Add Another New Table in
Same Page

Add Table :

↓

Add : \rightarrow Products

\rightarrow Total Amount

\rightarrow Profit Target met

Now,

Apply conditional format to total Amount

select table

↓
visual Panel

↓
Total amount 

click here

Conditional format

↓
Background colour

↓
select your colour

↓
OK

Turn off the totals in the
table

Add Title to Page

Insert : Ribbon



click : Text BOX



Type : " YTD Sales Dashboard "



move it at the top



increase the text size +
make it Bold



Add Background Colour



select this text BOX

YTD Sales Dashboard



Format : Ribbon



Send Backward



click anywhere in canvas
area

Now:

Insert a Rectangle shape
: Insert :- Shapes



Place it on the top of
Visual Card & Area chart



Fill :- whitish grey colour



Add : Shadow Effect



Select rectangle Box



Format : Send Backward



Place this rectangle white box
with same format everywhere



Note :- Within Power BI all table
visuals have white background
by default



so, select them



Visual : Font



Disable : Background.

Note :-

Do editing & formating



See final Result for Reference .