

Refreshing the budget workbook

Microsoft Power BI

Refreshing the budget workbook

- How he will refresh his data when new figures become available
- He began building the budget in October
- New data will be arriving over time
- Sales and the country/region managers will provide new forecasts
- David will need to add to his workbook
- How will he upload new data to refresh the existing data?

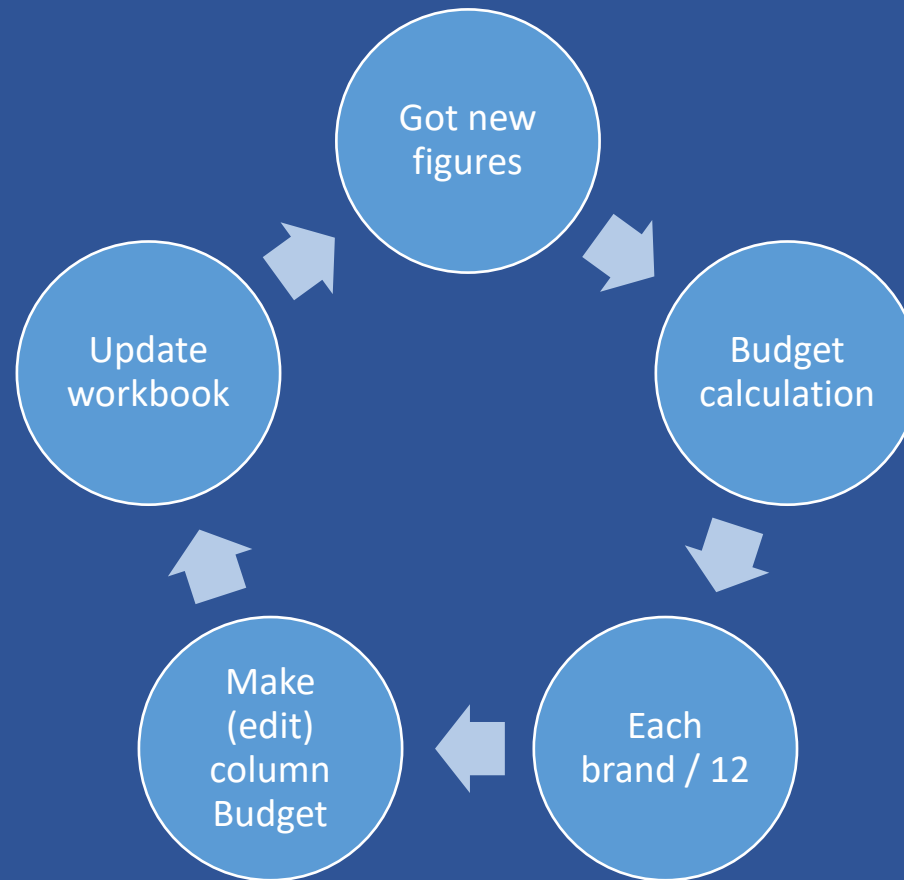
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- Country/region managers send update data
- Forecast base on the brand
- No monthly detail
- This forecast is at year level

CountryRegion	Brand	Budget
China	A. Datum	5,000.00
China	Adventure Works	36,500.00
China	Contoso	94,500.00
China	Fabrikam	90,800.00
China	Litware	65,000.00
China	Northwind Traders	12,000.00
China	Proseware	20,000.00
China	Southridge Video	22,500.00
China	Tailspin Toys	8,000.00
China	The Phone Company	30,000.00
China	Wide World Importers	45,000.00

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Make budget with forecast



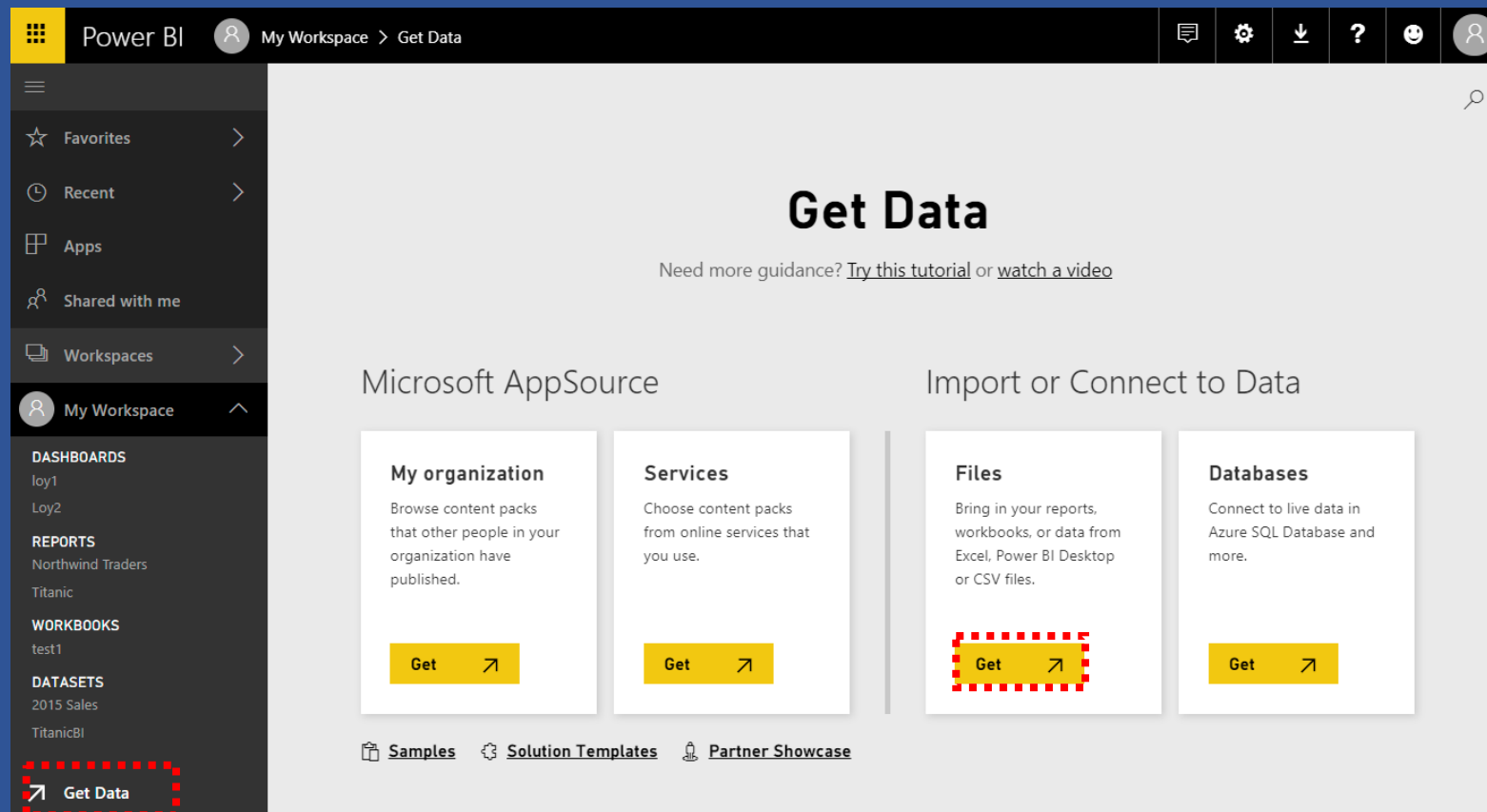
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- The workbook with the new Budget column
- Numbers do not reflect the seasonal nature of sales
- Number are not correct.
- We will fix this and use a better technique later

CountryRegion	Brand	Month	Sale 2013	Sale 2014	Sale 2015	Budget
China	A. Datum	January	3,234.00		1,935.00	416.67
China	A. Datum	February	6,270.00	7,059.00		416.67
China	A. Datum	March	4,352.00			416.67
China	A. Datum	April	3,814.00			416.67
China	A. Datum	May	6,234.00			416.67
China	A. Datum	June	5,571.00	3,216.00		416.67
China	A. Datum	July	7,424.00			416.67
China	A. Datum	August			800.00	416.67
China	A. Datum	September	1,254.00	1,617.00	396.00	416.67
China	A. Datum	October	1,881.00	3,042.00	936.00	416.67
China	A. Datum	November		3,653.00		416.67
China	A. Datum	December	6,135.00	2,810.00		416.67
China	Adventure Works	January	12,418.26	5,735.48	1,559.87	3,041.67
China	Adventure Works	February	31,770.26		2,937.90	3,041.67
China	Adventure Works	March	3,689.85	5,489.23	11,163.94	3,041.67

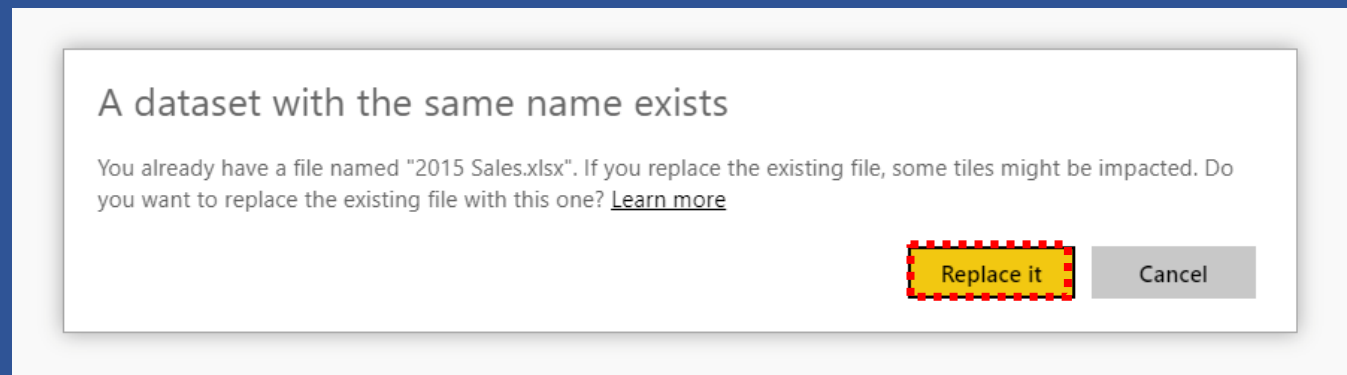
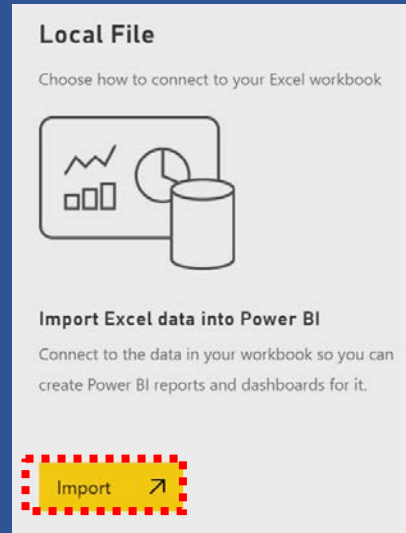
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- Download file : Sales and Budget Manually Combined.xlsx
- Change name to 2015 Sales.xlsx



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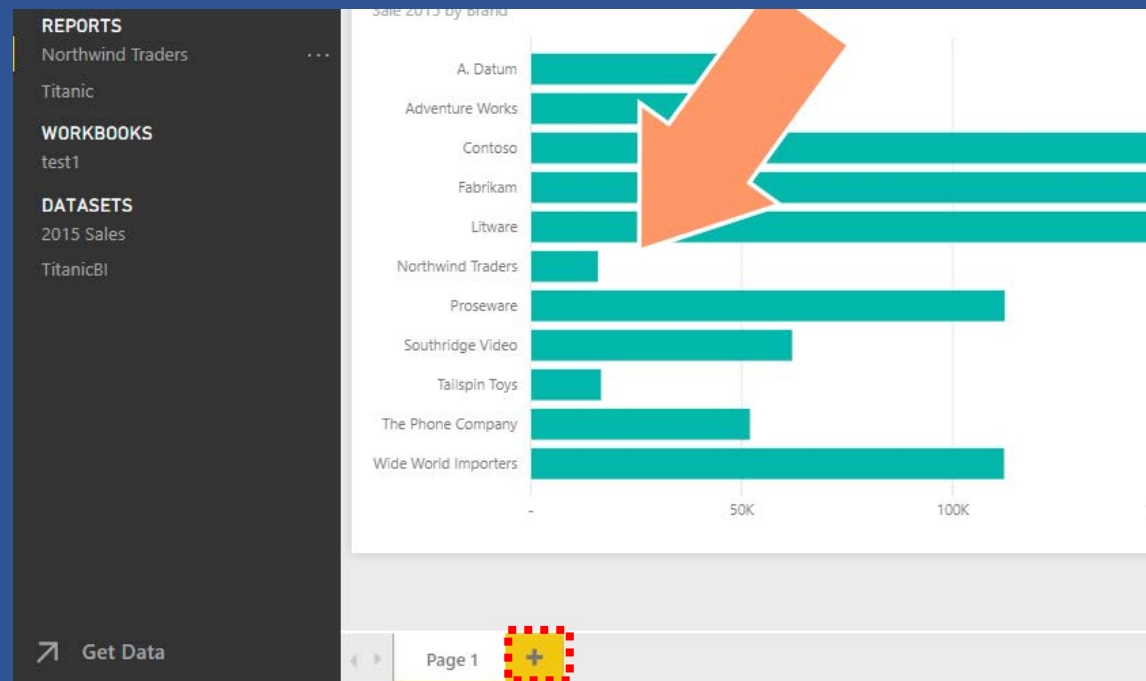
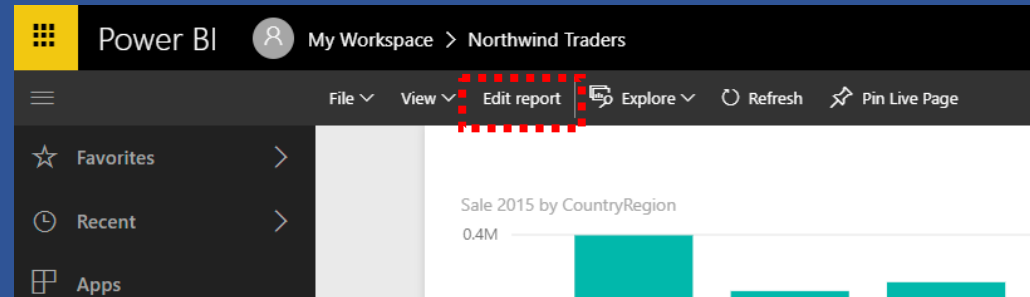
Local File, Import, Replace it



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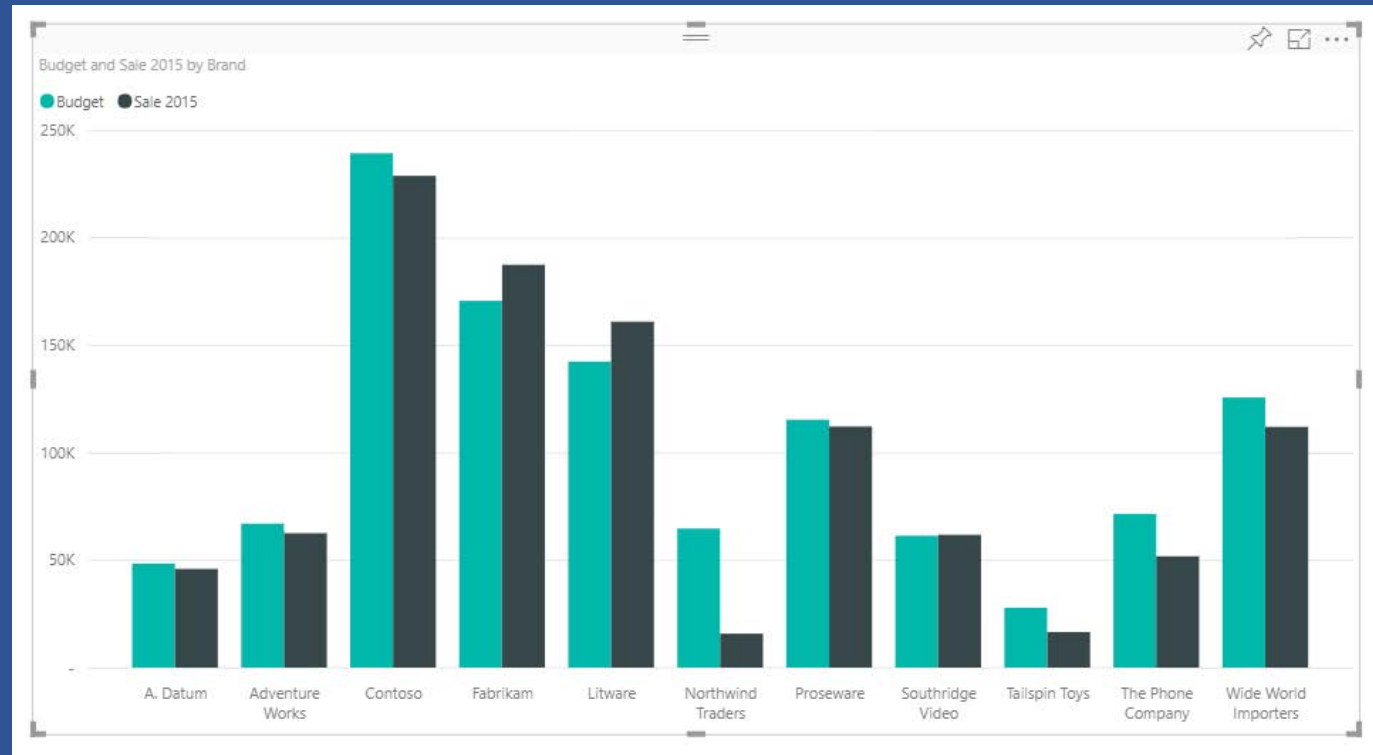
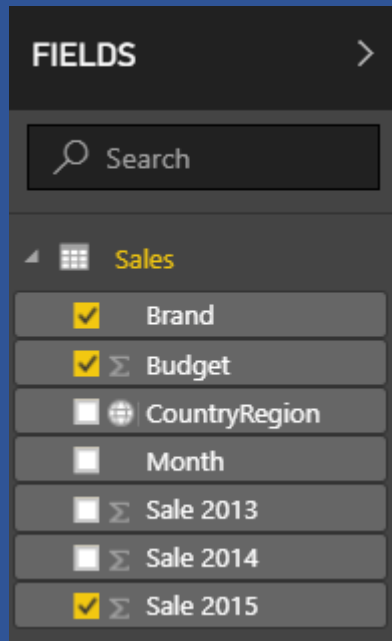
Add new page to report

- Click report
- Click **Edit report**
- Click + to add Page 2



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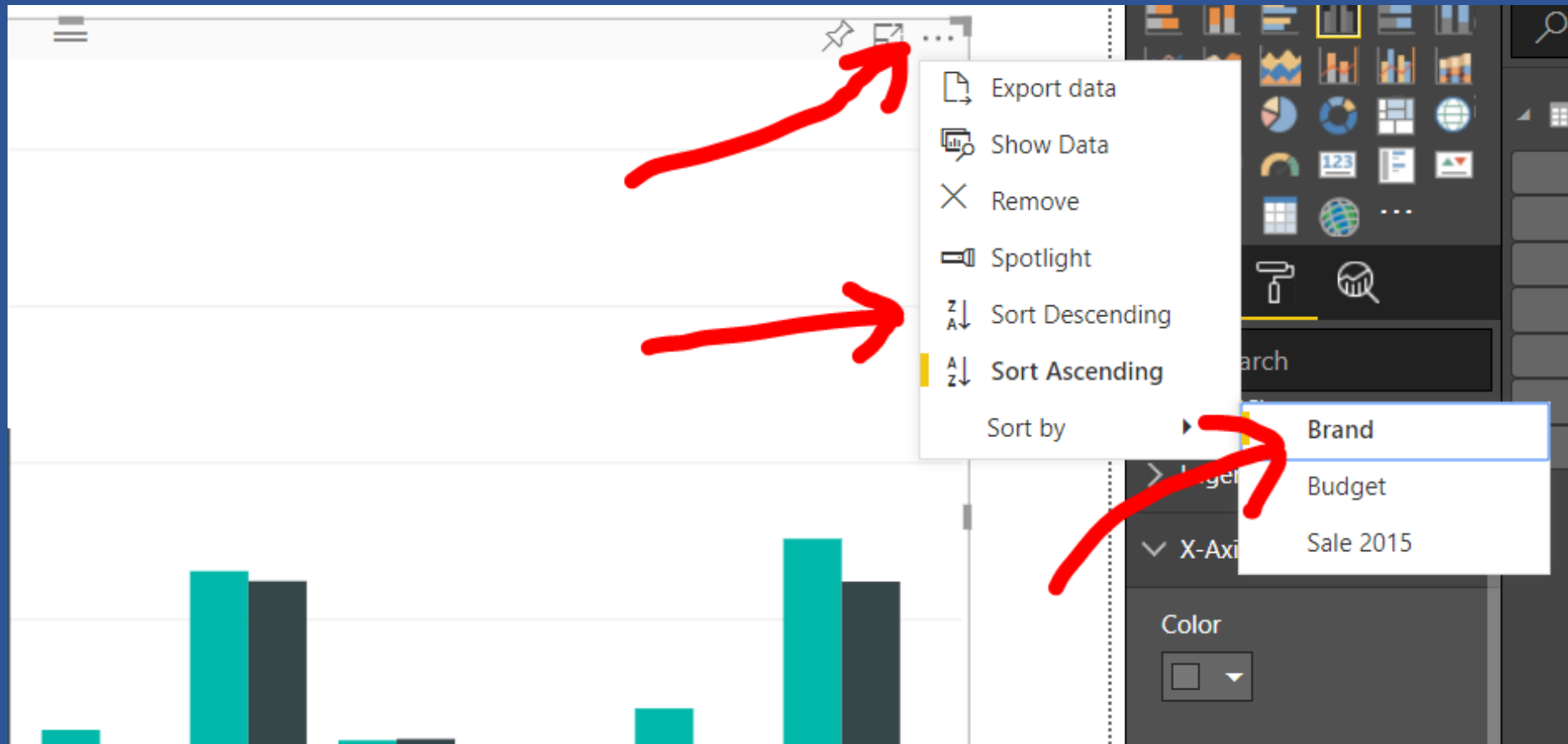
Budget and Sale 2015 by Brand



Clustered column chart

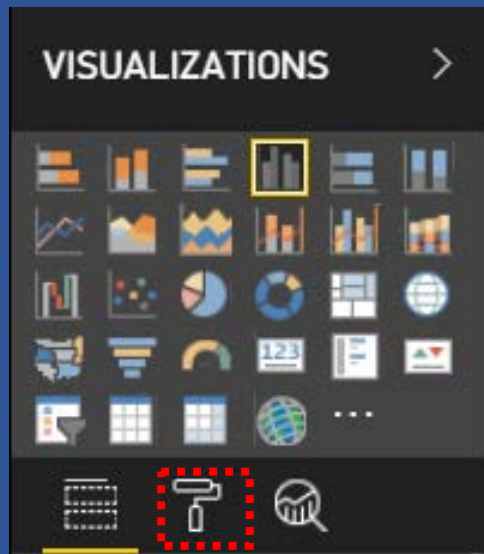
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Sorting

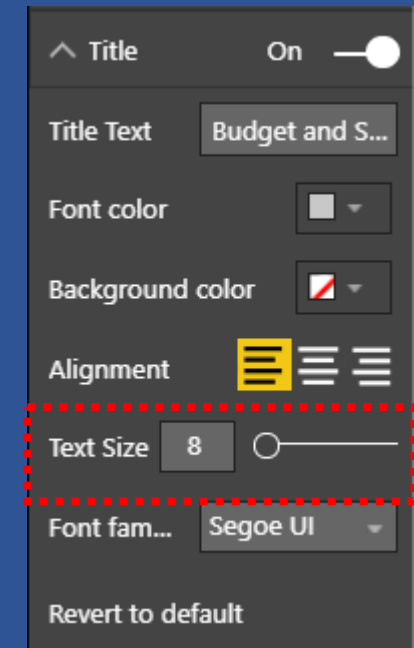
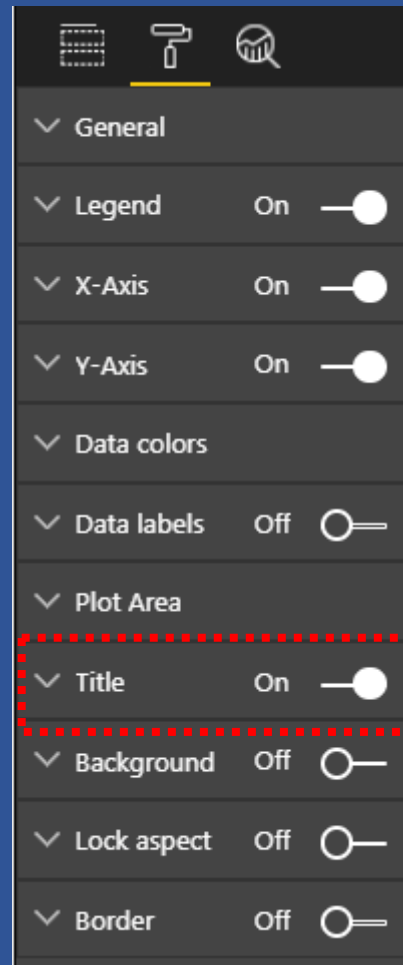


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Change Title font size

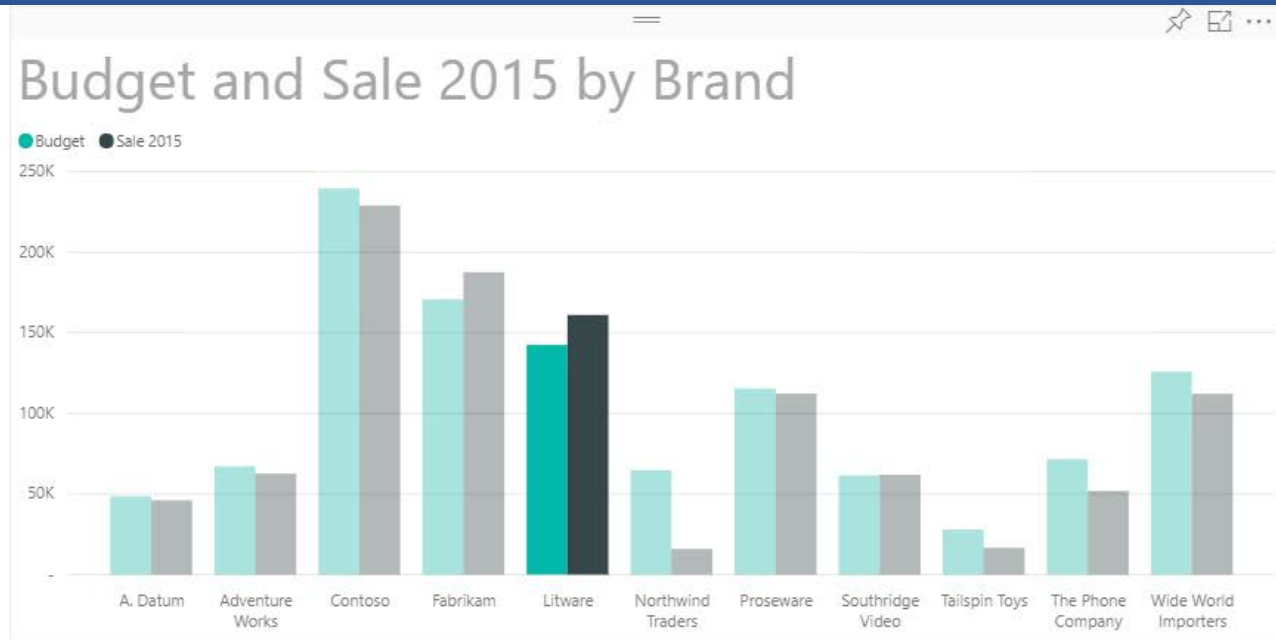


Click format



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Add Budget and Sale 2015 by CountryRegion



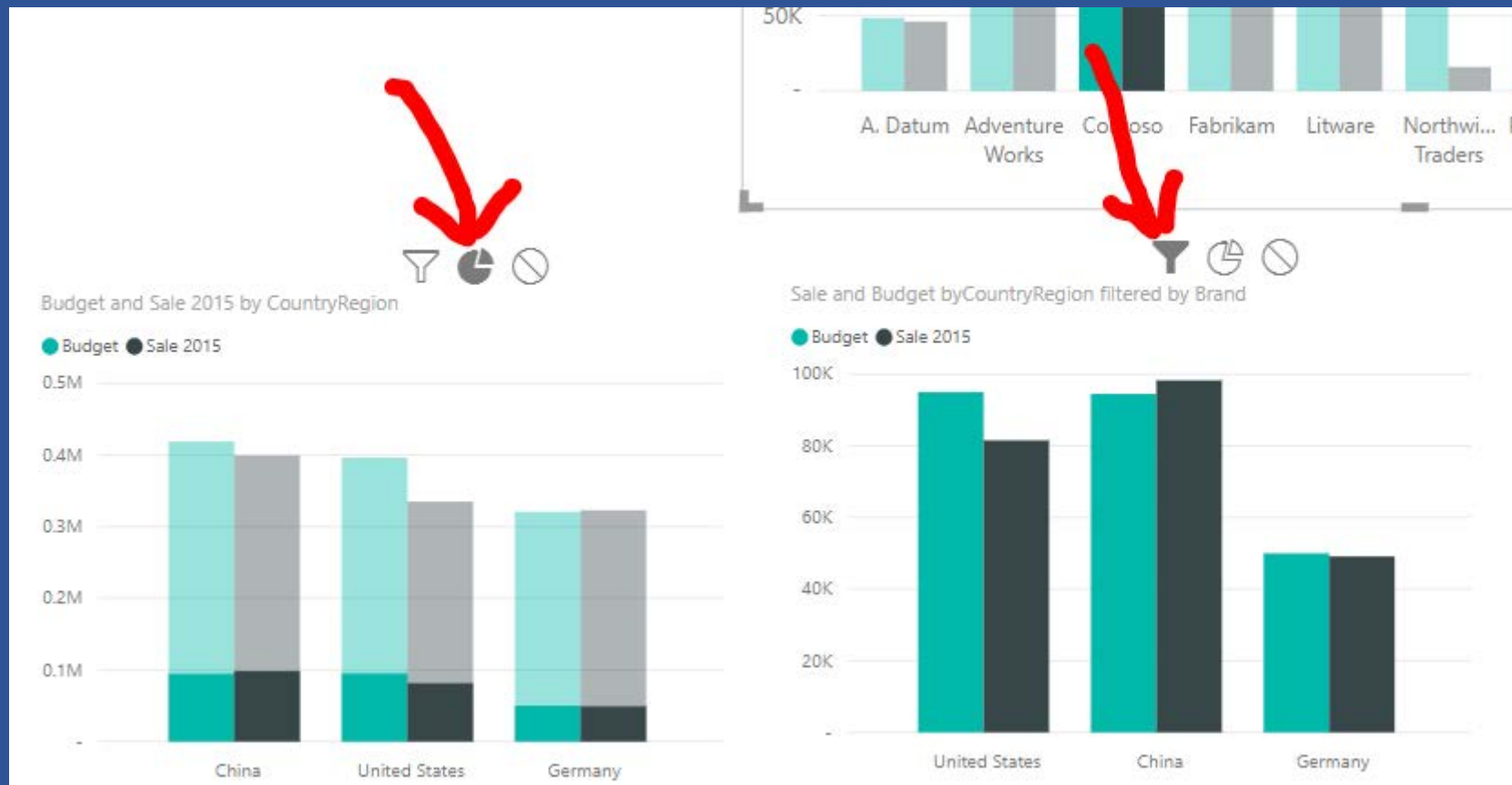
Budget and Sale 2015 by CountryRegion



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Add filter by brand

- Copy and paste to create new chart
- Change title to **Sale and Budget byCountryRegion filtered by Brand**
- Change **Visual Interaction** to **Filter**



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Filtering a report

Visual interactions:

- The filter is not saved as part of the report
- The filter is always visible

Standard filters:

- **Visual-level filters:** work on only an individual visualization
- **Page-level filters:** work at the report-page level
- **Report-level filters:** works on the entire report

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Add **page level filter** to show only China and Germany

FILTERS

Page level filters

CountryRegion
is China or Germany

Filter Type

Basic filtering

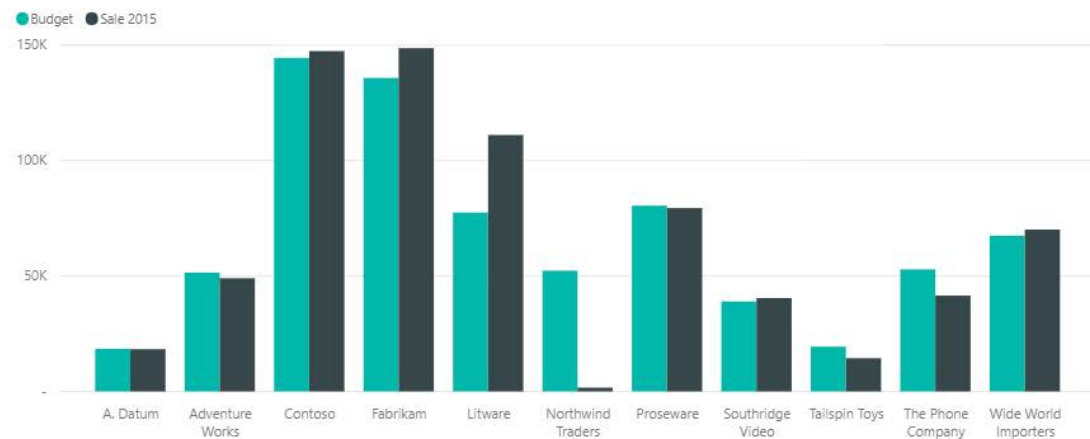
☐ Select All

☒ China 127

☒ Germany 126

☐ United States 129

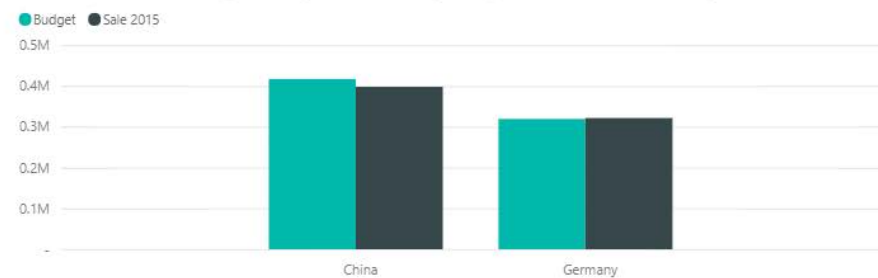
Budget and Sale 2015 by Brand



Budget and Sale 2015 by CountryRegion



Sale and Budget by CountryRegion filtered by Brand



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Add **Visual-level filters** to show only Sale greater than 50,000

FILTERS

Visual level filters

Brand(All)

Budget(All)

Sale 2015
is greater than 50,000...
Show items when the value:

is greater than ▼

50000

☒ And ☐ Or

▼

▼

Apply filter



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Exercise

Add Donut charts to the report

