Power BI

Paginated Reports in a Day

Lab 05B - December 2022 release

Develop a Table Report – Part 2

Overview

The estimated time to complete this lab is 20 minutes.

In this lab, you will enhance the design of the **Sales Performance** report with data bars and indicators.

The final report will look like the following:

Exercise 1: Enhance the report design

In this exercise, you will enhance the design of the **Sales Performance** report with data bars and indicators.

Important: There are many repetitive tasks when developing reports. The labs in this course will progressively reduce the detailed step-by-step instructions when detailed steps have already been provided.

Task 1: Add data bars

In this task, you will enhance the design of the report with Data Bars to graphically present the relative distribution of country and salespeople sales values.

1. In Power BI Report Builder, for the **Sales Performance** report, switch to the report designer.

2. Insert a column to the right of the **Sales** column.

3. To add a Data Bar, right-click inside the detail text box [C3] of the new column, and then select **Insert | Data Bar**.

4. In the **Select Data Bar Type** window, notice that the first data bar template is selected.
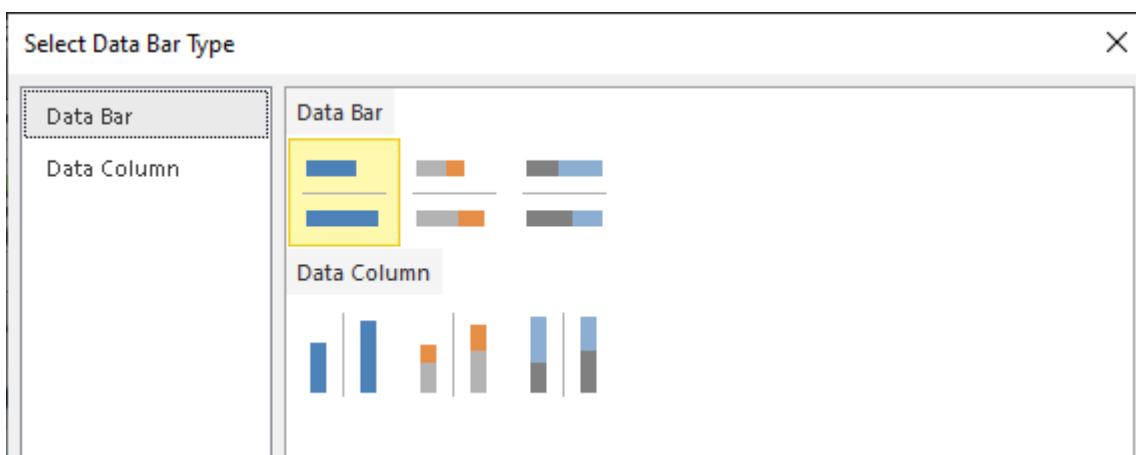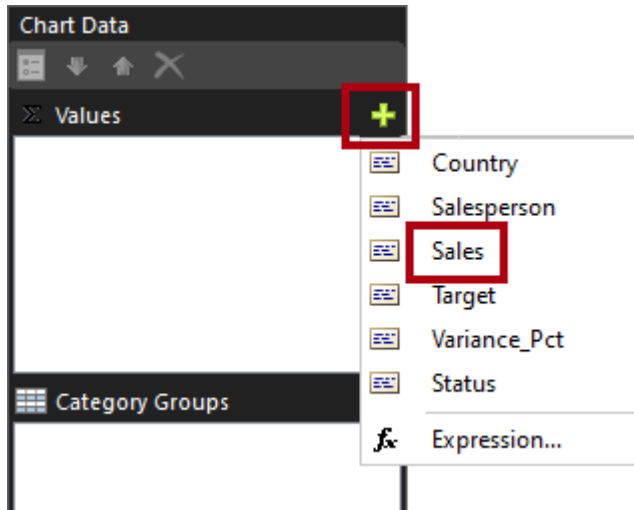

5. Click **OK**.

6. To configure the Data Bar, click the Data Bar to open the **Chart Data** pane (located at the right of the Data Bar).

   The Data Bar is an implementation of a chart data visualization.

7. In the **Chart Data** pane, located at the right of the **Values** list, click the green plus symbol, and then select the **Sales** field.


8. Add another Data Bar to the country group header text box [C2] in the new column.
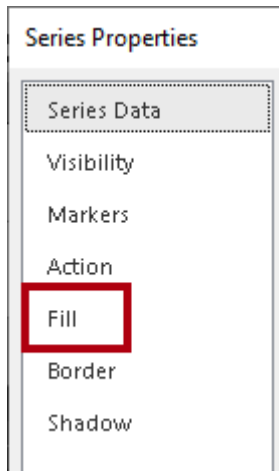
   The white background of the Data Bar (Chart) is overriding the light gray background color of the text box.

9. Configure the data bar to display the **Sales** field value.

10. To change the color of the country-level Data Bar, in the **Chart Data** pane, to edit the series properties of the **Sales** series, click the downarrow for the **Sales** series, and then select **Series Properties**.
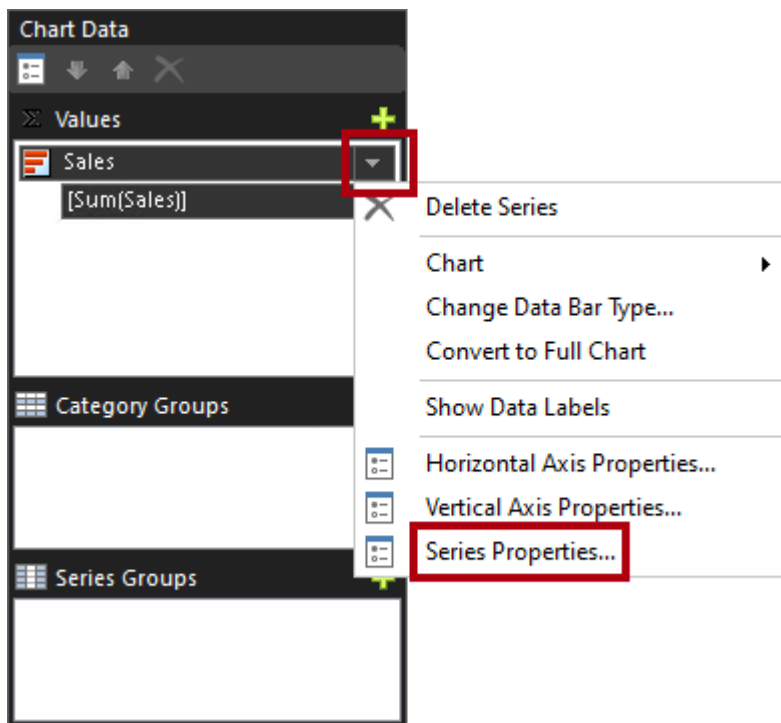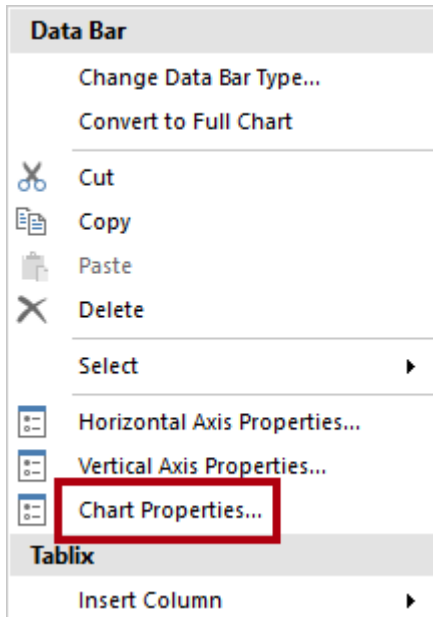

11. In the **Series Properties** window, select the **Fill** page.

12. Set the **Color** property to Green.

13. Click **OK**.

14. To modify the Data Bar (Chart) background color, right-click the white background of the country-level Data Bar, and then select **Chart Properties**.

15. In the **Chart Properties** window, select the **Fill** page, and then set the **Color** property to Light Gray (the same color as the text box background).

16. Click **OK**.

17. Preview the report.

18. Notice that the data bars within their groups, graphically and intuitively display the relative distribution of values.

19. Notice also the pattern of data bars for the salespeople in the United States.

    When data bars are sorted in descending order, they're can be described as a tornado chart.

Task 2: Add indicators

In this task, you will enhance the design of the report with an Indicator to graphically convey status.

1. Switch to the report designer.

2. Insert a column to the right of the **Variance %** column.

3. Change the width of the column to **0.4**.

4. To add an Indicator, right-click inside the detail row text box [H3] of the new column, and then select **Insert | Indicator**.

5. In the **Select Indicator Type** window, in the **Shapes** group, select **3 Signs** (diamond, triangle, circle shapes).
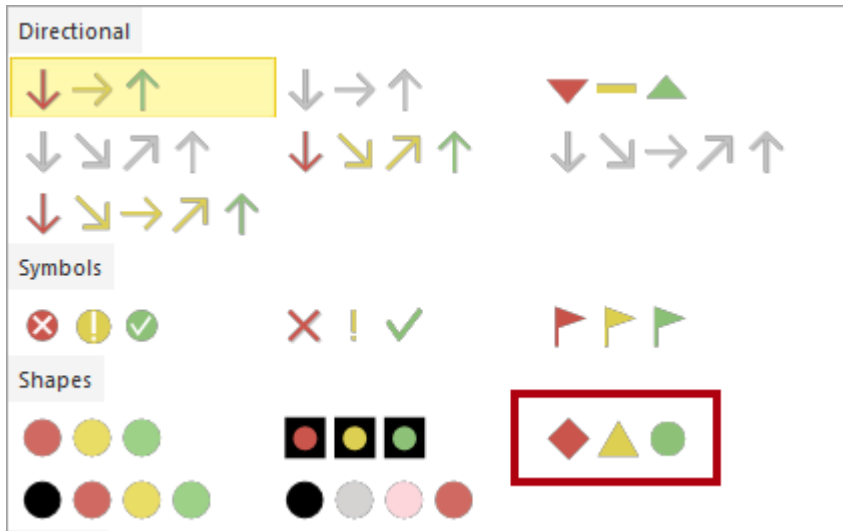
6. Click **OK**.

7. To configure the Indicator value, click the Indicator to open the **Gauge Data** pane (located at the right of the Indicator).

   *The Indicator is an implementation of a Gauge data visualization.*

8. Click the second downarrow for the **(Unspecified)** field, and then select **Status**.
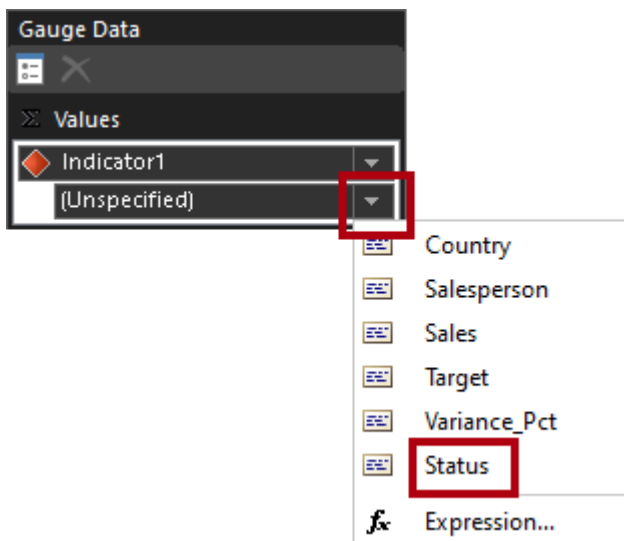
9. Recall that the **Status** field of the **dsMain** dataset returns the values 1, 0, or -1.

   The values are 1, 0, or -1. 1 means "on track", 0 means "slightly off track", and -1 means "off track".

10. To configure the Indicator, in the **Gauge Data** pane, right-click **Indicator1**, and then select **Indicator Properties**.
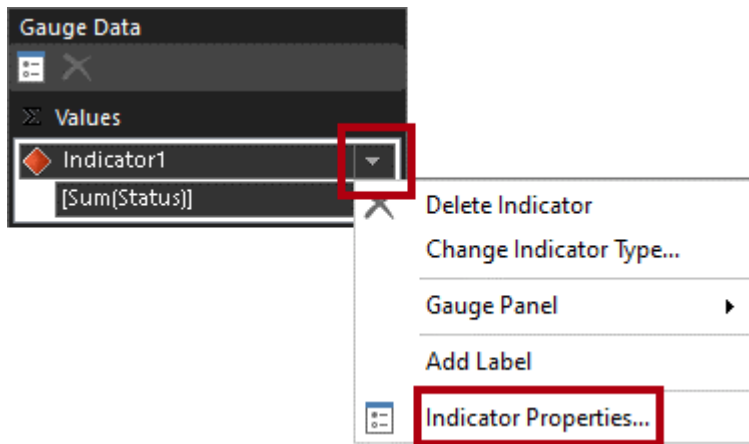
11. In the **Indicator Properties** window, select the **Value and States** page.
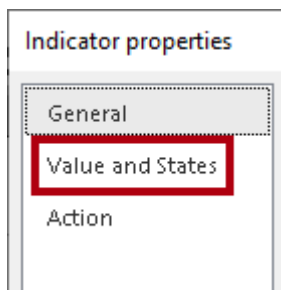
12. In the **States Measurement Unit** dropdown list, select **Numeric**.
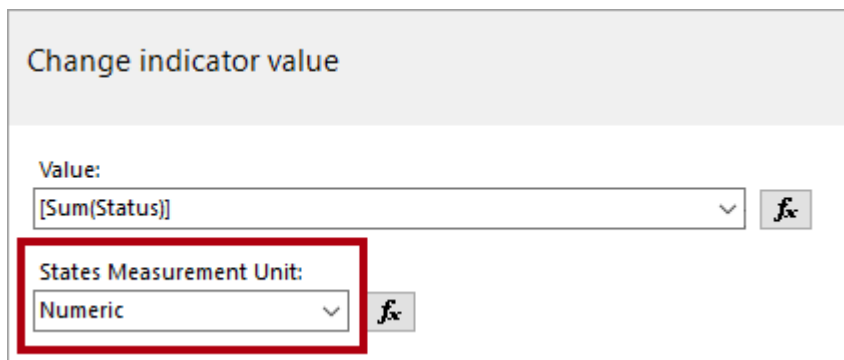
13. Set the following indicator states:

- Red diamond icon: start -1, end -1

- Yellow triangle icon: Start 0, end 0
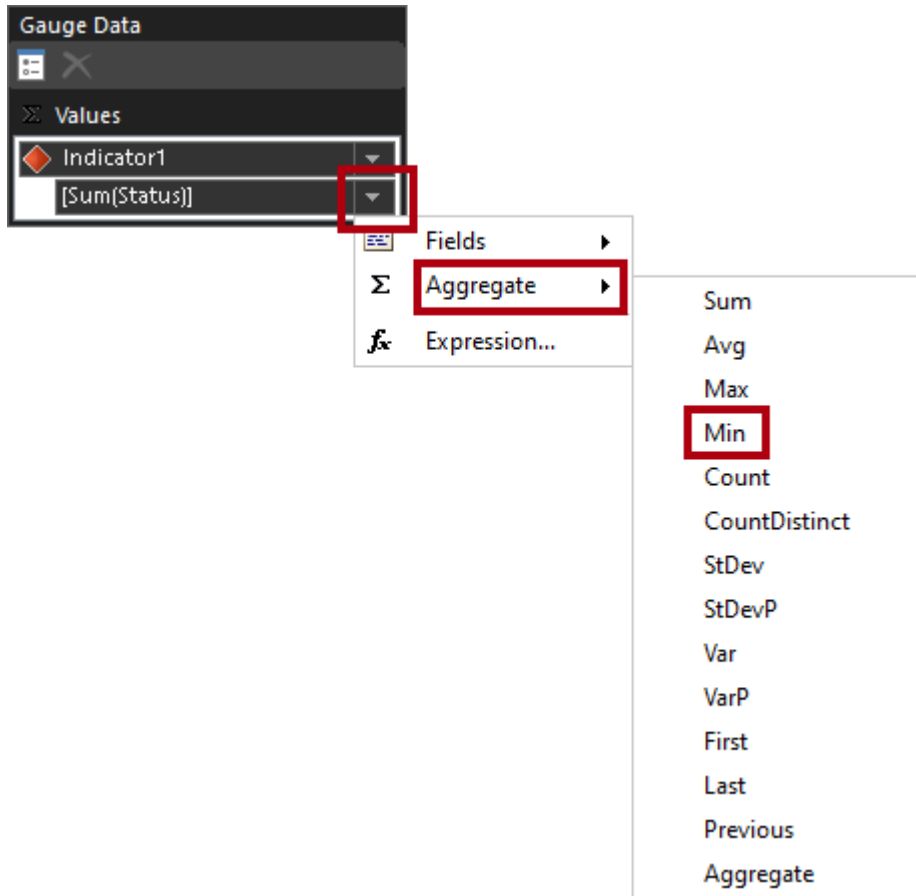
- Green circle icon: Start 1, end 1

The indicator states map directly to the values retrieved from the dataset.
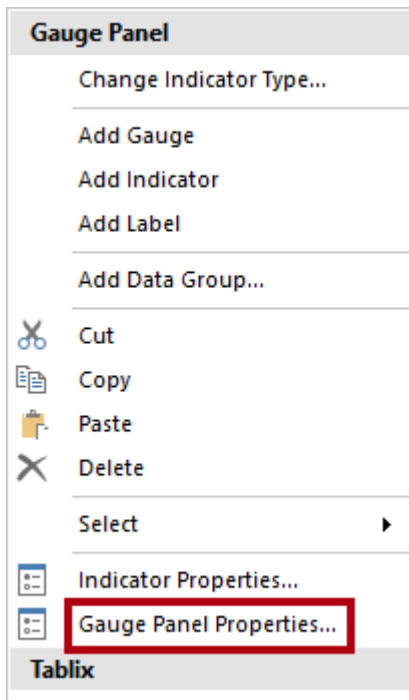
14. Click **OK**.

15. To add an Indicator to the **Country** group row, copy the detail row indicator, and then paste it into the **Country** group row text box [H2].

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16. To modify the gauge data field mapping, click the down-arrow for the **Sum(Status)**, and then select **Aggregate | Min**.

Using the minimum function ensures that the country indicator displays the lowest status achieved by a salesperson. This way, when a salesperson's performance is off track (-1), the country will also be off track.

17. To modify the Indicator (Gauge) background color, right-click the white background of the Indicator, and then select **Gauge Panel Properties**.

18. In the **Gauge Panel Properties** window, select the **Fill** page, and then set the **Color** property to Light Gray.

19. Click **OK**.

20. To add an Indicator to the total row, use the steps in this task to copy the **Country** group row indicator [H2], and then paste it into the total row text box [H4].

21. Modify the background color to Silver.

22. Remove any excess width from the report body, and trailing space beneath the Table.

23. Preview the report, and then review the data bars and indicators.

24. Leave the report open.

    *In the next lab, you will continue the development of the **Sales Performance** report by adding interactivity features.*

Summary

In this lab, you enhanced the design of the **Sales Performance** report with data bars and indicators.

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