Microsoft Power Platform

Power BI Paginated Reports in a Day

Lab 02A - December 2022 release

Create Your First Report

Overview

The estimated time to complete this lab is 20 minutes.

In this lab, you will create your first report by using a Wizard.

The final report will look like the following:

Sales Order Line Number	English Product Name	Order Quantity	Unit Price	Sales Amount
1	Hydration Pack - 70 oz.	12	31.8942	375.0758
2	LL Mountain Pedal	6	24.2940	145.7640
3	Mountain-200 Black, 38	13	1331.0942	16958.1401
4	Long-Sleeve Logo Jersey, XL	3	29.9940	89.9820
5	LL Mountain Frame - Black, 48	1	149.8740	149.8740
6	LL Mountain Seat/Saddle	3	16.2720	48.8160
7	LL Bottom Bracket	7	32.3940	226.7580
8	Women's Mountain Shorts, L	7	41.9940	293.9580
9	Mountain-500 Black, 48	3	323.9940	971.9820
10	Mountain-500 Black, 42	1	323.9940	323.9940
11	Short-Sleeve Classic Jersey, S	13	31.3142	398.9429
12	Rear Brakes	3	63.9000	191.7000
13	Bike Wash - Dissolver	16	4.3725	66.4620
14	LL Mountain Frame - Black, 42	4	149.8740	599.4960
15	Women's Mountain Shorts, S	9	41.9940	377.9460
16	HL Mountain Frame - Silver, 46	1	818.7000	818.7000

Exercise 1: Create your first report

In this exercise, you will use a Wizard to create your first report.

The Wizards can be helpful to fast track a report design. Once the Wizard creates a report, it may not look especially good. Often, you will need to refine the report layout. In later labs in this course, you will learn how to style and configure the report layout to meet your precise design requirements.

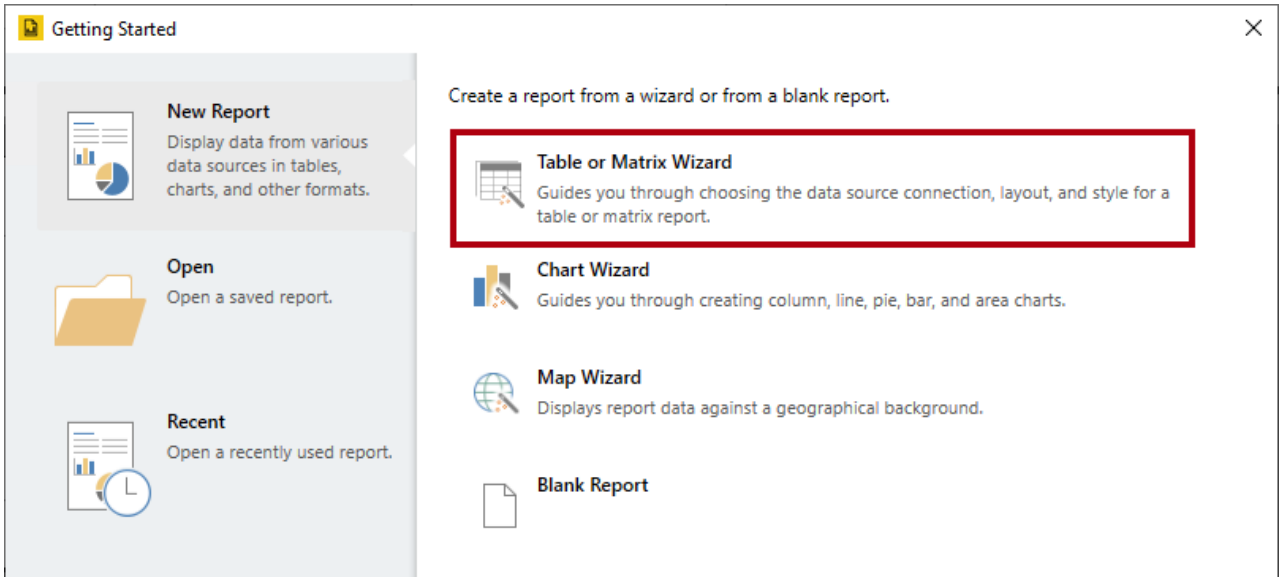
Task 1: Create the report

In this task, you will create a report.

0. Open Power BI Report Builder.

1. In the **Getting Started** pane, select **Table or Matrix Wizard**.

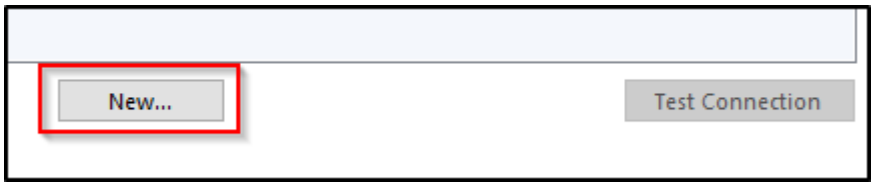
   *If the **Getting Started** pane doesn't open (because it has been disabled), on the **File** ribbon tab, select **Open**.*



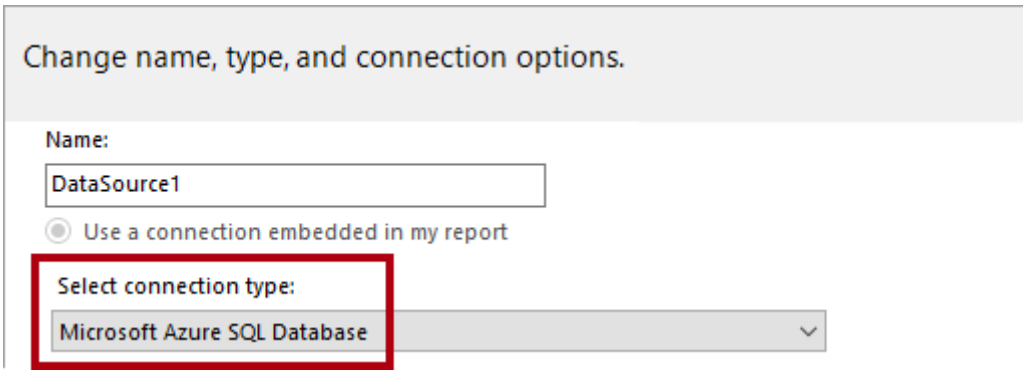
2. In the **New Table or Matrix** window, at the **Choose a Dataset** step, click **Next**.

   The report doesn't yet have a dataset—you will create one during a later Wizard step.

3. At the **Choose a Connection to a Data Source** step, click **New**.



4. In the **Data Source Properties** window, in the **Select Connection Type** dropdown list, select **Microsoft Azure SQL Database**.



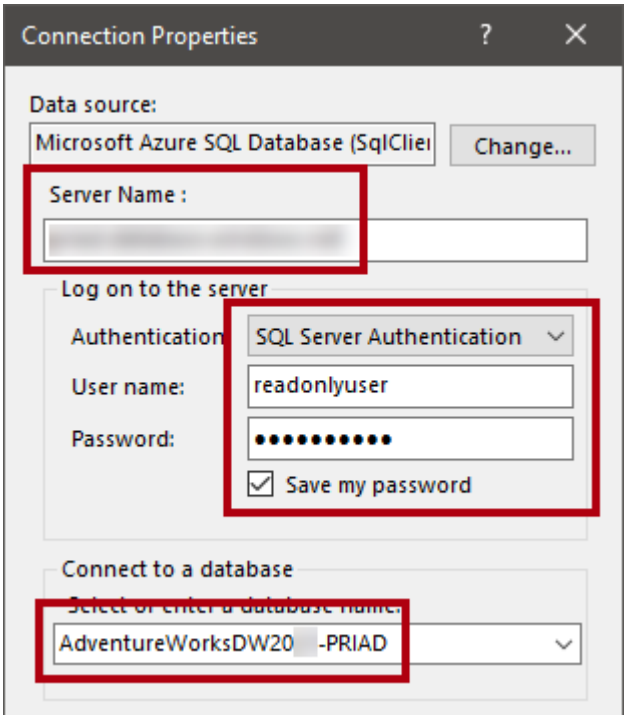
5. To create the connection string, click **Build**.

6. Copy the following connection properties from the **<CourseFolder>\PowerBIPRIAD\MySolution\MyEnvironment.txt** file.

   - Server name: **priad.database.windows.net**
   - Authentication: **SQL Server Authentication**
   - User name: **readonlyuser**
   - Password: **Pass@word1**

7. Check the **Save My Password** checkbox.

8. In the **Connect To a Database** section, in the **Select or Enter a Database Name** dropdown list, **paste in the database name**: **AdventureWorksDW2021-PRIAD**



9. Click **Test Connection**, and verify that the connection succeeds, then click **OK**.

   Important: If the connection doesn't succeed, it could be because you've entered incorrect connection details, or a firewall doesn't permit you to connect to the Azure SQL Database. If you suspect it's the latter case, you could open the firewall port, or try another network (for example, you could tether to your mobile device). For more information, see Azure SQL Database and Azure SQL Data Warehouse IP firewall rules.

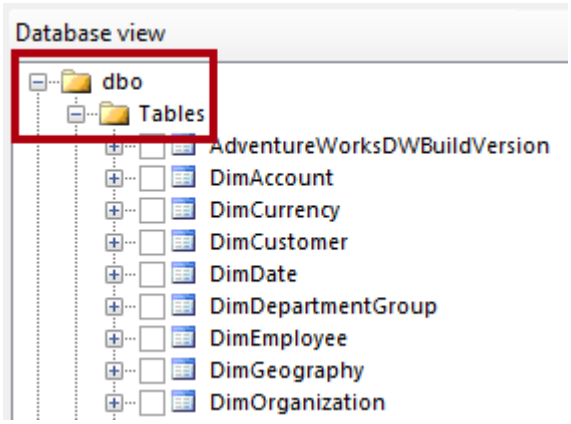
10. In the **Connection Properties** window, click **OK**.

11. In the **Data Source Properties** window, in the **Connection String** box, notice that the connection string has been inserted.

12. Click **OK**.

13. In the Wizard, click **Next**.

14. At the **Design a Query** step, in the **Database View** pane (located at the left), expand the **dbo** schema, and then expand the **Tables** folder.



15. Expand the **FactResellerSales** table, and then check the following four columns:

    - SalesOrderLineNumber
    - OrderQuantity
    - UnitPrice
    - SalesAmount

16. Expand the **DimProduct** table, and then check the **EnglishProductName** column.

17. In the **Selected Fields** pane (located at the top-right), review—but do not change—the list of fields.

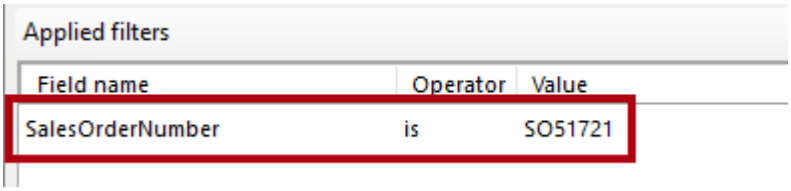
    All selected columns have become fields.

18. In the **Applied Filters** pane (located at the bottom-right), at the far right, click the **Add Filter** button.

19. Notice that the **SalesOrderLineNumber** was added to the **Applied Filters** pane.

20. Modify the item to filter by the **SalesOrderNumber** column of the **FactResellerSales** table instead.

21. In the corresponding **Value** box, enter **SO51721** (SO is an acronym for *Sales Order*, the O is the letter O).

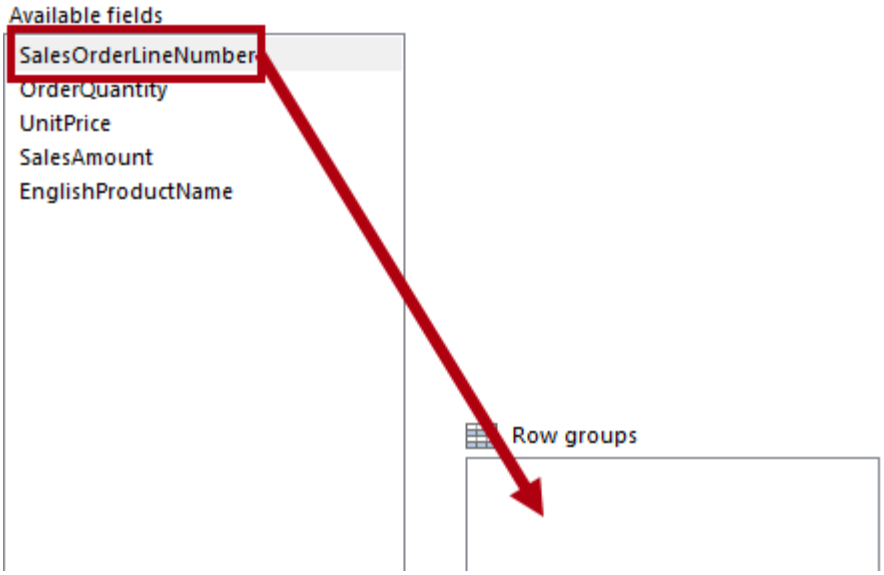


22. On the toolbar, click **Run Query**.

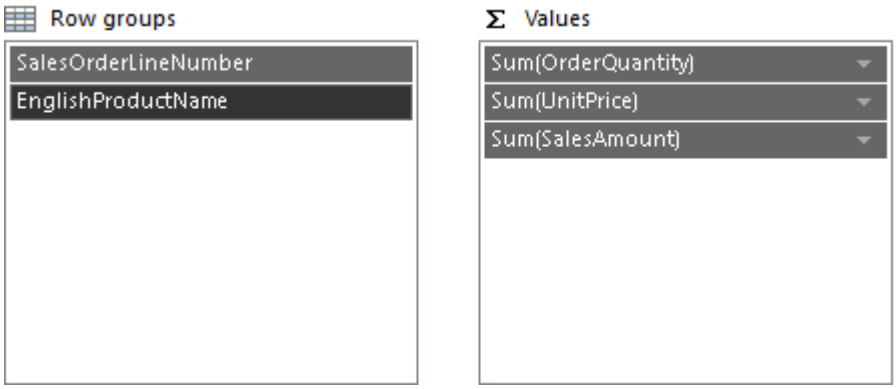
23. Review the query result.

24. In the Wizard, click **Next**.

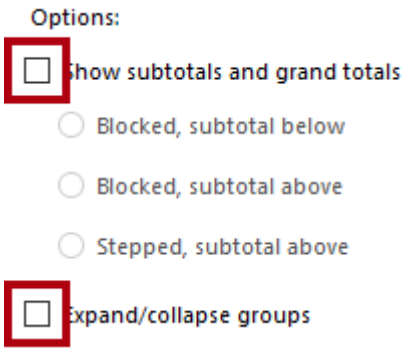
25. At the **Arrange Fields** step, from the **Available Fields** list, drag the **SalesOrderLineNumber** field into the **Row Groups** box.



26. Drag the following available fields to the specific wells:
    - OrderQuantity to **Values**
    - UnitPrice to **Values**
    - SalesAmount to **Values**
    - EnglishProductName to **Row Groups**
27. Verify that the layout looks like the following:

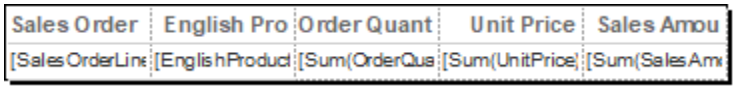


28. In the Wizard, click **Next**.
29. At the **Choose the Layout** step, uncheck both layout options.



*The intention of the report design is to list sales order line numbers. There's no need for subtotals or expanding/collapsing groups. You will work with these capabilities in **Lab 05A** and **Lab 06A**.*

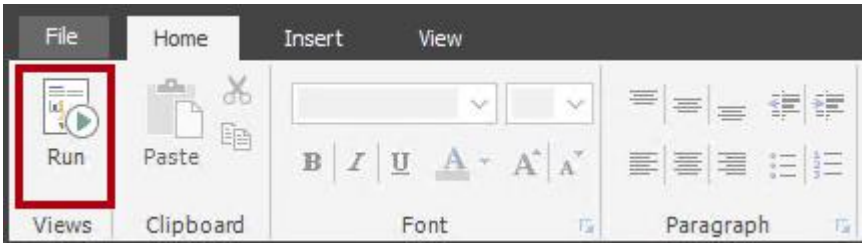
30. In the Wizard, click **Next**.
31. At the **Preview** step, review the layout, consisting of five columns.



32. In the Wizard, click **Finish**.

33. Notice that the Wizard has created a report and has added a data region to the report canvas.

34. To preview the report, on the **Home** ribbon tab (or at the bottom-right), from inside the **Views** group, click **Run**.



35. In the report preview, notice a grid displaying sales order details.

    The Wizard has created a simple report, but much work needs to be done to complete the report design. In this course, however, you won't continue the design of this report. In later labs, you will learn how to complete a report design to meet your precise design requirements.

36. To close Report Builder, at the top-right, click **X**.

37. If prompted to save changes, click **No**. This report will not be used in future labs so it is not required to save this report, but you can if you would like.

Summary

In this lab, you created your first report by using a Wizard.

Terms of use

By using this hands-on lab, you agree to the following terms:

The technology/functionality described in this hands-on lab is provided by Microsoft Corporation in a "sandbox" testing environment for purposes of obtaining your feedback and to provide you with a learning experience. You may only use the hands-on lab to evaluate such technology features and functionality and provide feedback to Microsoft. You may not use it for any other purpose. Without written permission, you may not modify, copy, distribute, transmit, display, perform, reproduce, publish, license, create derivative works from, transfer, or sell this hands-on lab or any portion thereof.

COPYING OR REPRODUCTION OF THE HANDS-ON LAB (OR ANY PORTION OF IT) TO ANY OTHER SERVER OR LOCATION FOR FURTHER REPRODUCTION OR REDISTRIBUTION WITHOUT WRITTEN PERMISSION IS EXPRESSLY PROHIBITED.

THIS HANDS-ON LAB PROVIDES CERTAIN SOFTWARE TECHNOLOGY/PRODUCT FEATURES AND FUNCTIONALITY, INCLUDING POTENTIAL NEW FEATURES AND CONCEPTS, IN A SIMULATED ENVIRONMENT WITHOUT COMPLEX SET-UP OR INSTALLATION FOR THE PURPOSE DESCRIBED ABOVE. THE TECHNOLOGY/CONCEPTS REPRESENTED IN THIS HANDS-ON LAB MAY NOT REPRESENT FULL FEATURE FUNCTIONALITY AND MAY NOT WORK THE WAY A FINAL VERSION MAY WORK. WE ALSO MAY NOT RELEASE A FINAL VERSION OF SUCH FEATURES OR CONCEPTS. YOUR EXPERIENCE WITH USING SUCH FEATURES AND FUNCITONALITY IN A PHYSICAL ENVIRONMENT MAY ALSO BE DIFFERENT.

FEEDBACK If you give feedback about the technology features, functionality and/or concepts described in this hands-on lab to Microsoft, you give to Microsoft, without charge, the right to use, share and commercialize your feedback in any way and for any purpose. You also give to third parties, without charge, any patent rights needed for their products, technologies and services to use or interface with any specific parts of a Microsoft software or service that includes the feedback. You will not give feedback that is subject to a license that requires Microsoft to license its software or documentation to third parties because we include your feedback in them. These rights survive this agreement.

MICROSOFT CORPORATION HEREBY DISCLAIMS ALL WARRANTIES AND CONDITIONS WITH REGARD TO THE HANDS-ON LAB, INCLUDING ALL WARRANTIES AND CONDITIONS OF MERCHANTABILITY, WHETHER EXPRESS, IMPLIED OR STATUTORY, FITNESS FOR A PARTICULAR PURPOSE, TITLE AND NON-INFRINGEMENT. MICROSOFT DOES NOT MAKE ANY ASSURANCES OR REPRESENTATIONS WITH REGARD TO THE ACCURACY OF THE RESULTS, OUTPUT THAT DERIVES FROM USE OF THE VIRTUAL LAB, OR SUITABILITY OF THE INFORMATION CONTAINED IN THE VIRTUAL LAB FOR ANY PURPOSE.

DISCLAIMER This lab contains only a portion of new features and enhancements in Microsoft Power BI. Some of the features might change in future releases of the product.