

Power BI

Paginated Reports

in a Day

Lab 07A - December 2022 release


Use the Paginated Report Visual


Overview

The estimated time to complete this lab is 10 minutes.

In this lab, you will use the paginated report visual to embed the **Sales Order** paginated report into the **Sales Analysis** Power BI report.

The final report layout will look like the following:



<h1>Sales Order Detail</h1>																																																							
<div><div>SO71783 Sales Order</div><div>Eastside Department ... Reseller</div><div>Warehouse Business Type</div><div>Linda Mitchell Salesperson</div><div>286 Quantity</div><div>\$65,683.37 Sales</div><div>\$76,016.73 Cost</div><div>(\$10,333.36) Profit</div><div>-15.73% Profit %</div></div> <div><div>Export ▾ 1 of ?</div><div><div><div>Sales Order</div><div>Number: SO71783 Reseller: Eastside Department Store Date: 06/03/2021</div></div></div><table><tr><th>Line</th><th>Product</th><th>Quantity</th><th>Price</th><th>Sales</th></tr><tr><td>1</td><td>LL Road Frame - Black, 52</td><td>4</td><td>\$202.33</td><td>\$809.33</td></tr><tr><td>2</td><td>ML Road Pedal</td><td>6</td><td>\$37.25</td><td>\$223.52</td></tr><tr><td>3</td><td>Road-250 Black, 44</td><td>3</td><td>\$1,466.01</td><td>\$4,398.03</td></tr><tr><td>4</td><td>Road-750 Black, 58</td><td>4</td><td>\$323.99</td><td>\$1,295.98</td></tr><tr><td>5</td><td>Hydration Pack - 70 oz.</td><td>9</td><td>\$32.99</td><td>\$296.95</td></tr><tr><td>6</td><td>Half-Finger Gloves, M</td><td>7</td><td>\$14.69</td><td>\$102.86</td></tr><tr><td>7</td><td>Road-350-W Yellow, 48</td><td>25</td><td>\$850.50</td><td>\$19,136.14</td></tr><tr><td>8</td><td>Long-Sleeve Logo Jersey, M</td><td>6</td><td>\$29.99</td><td>\$179.96</td></tr><tr><td>9</td><td>Bike Wash - Dissolver</td><td>8</td><td>\$4.77</td><td>\$38.16</td></tr><tr><td>10</td><td>HL Road Handlebars</td><td>1</td><td>\$72.16</td><td>\$72.16</td></tr></table></div>	Line	Product	Quantity	Price	Sales	1	LL Road Frame - Black, 52	4	\$202.33	\$809.33	2	ML Road Pedal	6	\$37.25	\$223.52	3	Road-250 Black, 44	3	\$1,466.01	\$4,398.03	4	Road-750 Black, 58	4	\$323.99	\$1,295.98	5	Hydration Pack - 70 oz.	9	\$32.99	\$296.95	6	Half-Finger Gloves, M	7	\$14.69	\$102.86	7	Road-350-W Yellow, 48	25	\$850.50	\$19,136.14	8	Long-Sleeve Logo Jersey, M	6	\$29.99	\$179.96	9	Bike Wash - Dissolver	8	\$4.77	\$38.16	10	HL Road Handlebars	1	\$72.16	\$72.16
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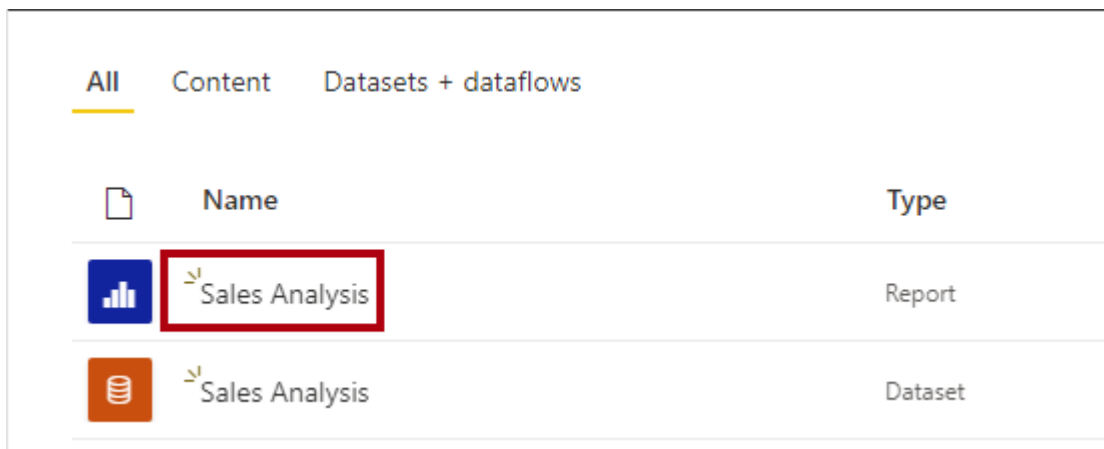
Exercise 1: Use the Paginated Report visual

In this exercise, you will use the paginated report visual to embed the **Sales Order** paginated report into the **Sales Analysis** Power BI report.

Task 1: Explore the Power BI report

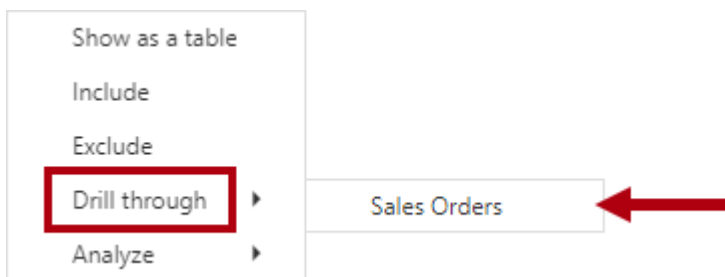
In this task, you will open and explore the **Sales Analysis** Power BI report.

0. In the Power BI service web browser session, open the **Sales Analysis** report.



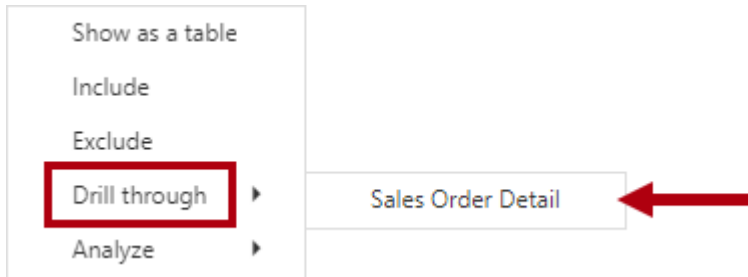
*This is the report you imported in **Lab 01A**.*

1. Notice that the report page shows monthly sales and target values.
2. Right-click either of the June columns, and then select **Drill through | Sales Orders**.

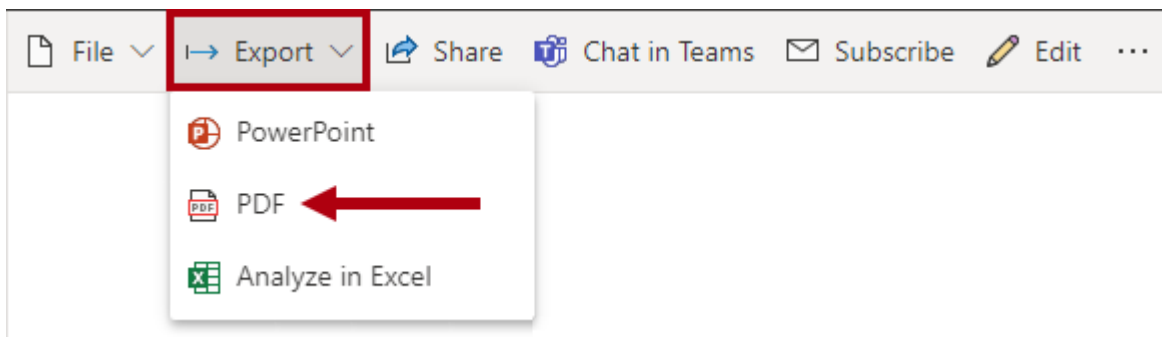


3. On the drill through page, review the table of June sales orders.

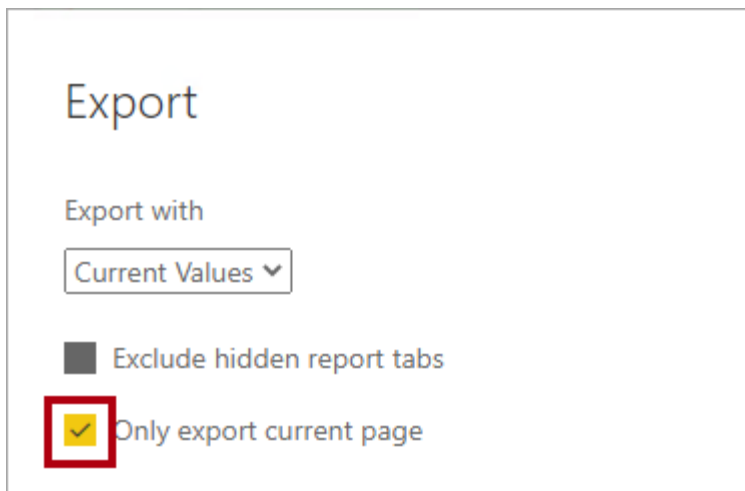
- Right-click sales order **SO71783** (located about half way down), and the drill through to the sales order detail.



- On this second drill through page, review the detail of the sales order.
- Notice that the table visual that presents a list of the order line details, and that a vertical scroll bar is required to browse all details.
- Optionally, on the menu bar, select **Export | PDF**.



- In the Export window, check the **Only Export Current Page** checkbox.



- Click **Export**.

10. When the PDF document downloads, open it, and then review the report page.

Because the PDF document represents a static image of the page, it's not possible to scroll through the list of sales order lines. You will improve the design of this report by using a paginated report instead, which can be exported in many formats.

11. Close the PDF document.

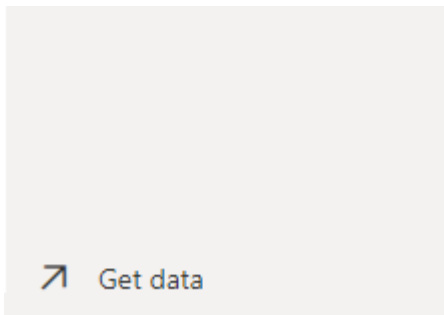
Task 2: Import a paginated report

In this task, you will import the **Sales Order** paginated report.

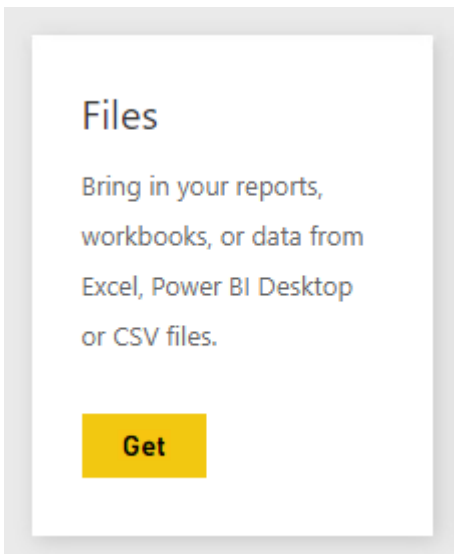
0. Open a new web session for the Power BI service.

*Tip: You can do that by right-clicking the web session tab, and selecting **Duplicate**.*

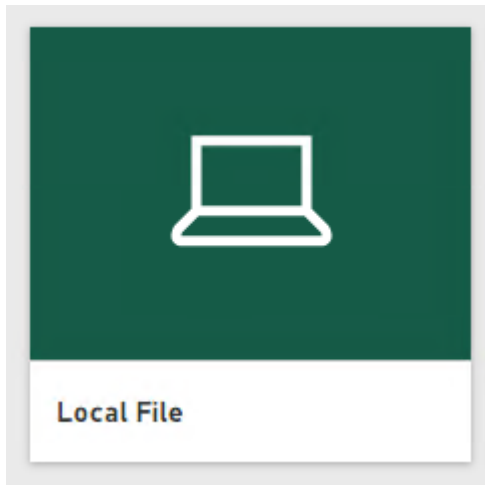
1. To upload a paginated report file, at the bottom of the **Navigation** pane, click **Get Data**.



2. Click the **Files** tile.



- Click the **Local File** tile.



- In the **Open** window, select the **<CourseFolder>\PowerBIPRIAD\Lab07A\Assets\Sales Order.rdl** file.

*This file will be used as a data source in **Lab 05A**. In **Lab 07A**, you will modify the report to embed a paginated report.*

- Open the **Sales Order** report.



- In the **Sales Order** parameter box, enter **SO71783**.



- At the top-right, click **View Report**.



- Use the page navigation control to review the sales order comprising 43 order lines over two pages.

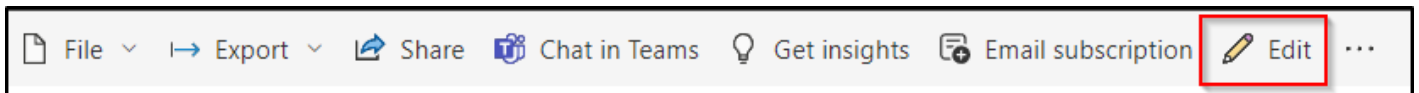
In the next task, you will embed this report into the Power BI report.

9. Close the current web session.

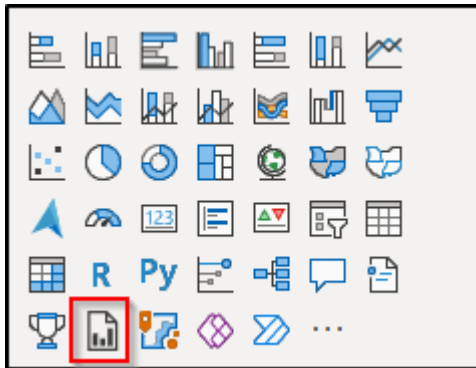
Task 3: Update the Power BI report

In this task, you will update the **Sales Analysis** report by adding a paginated report visual.

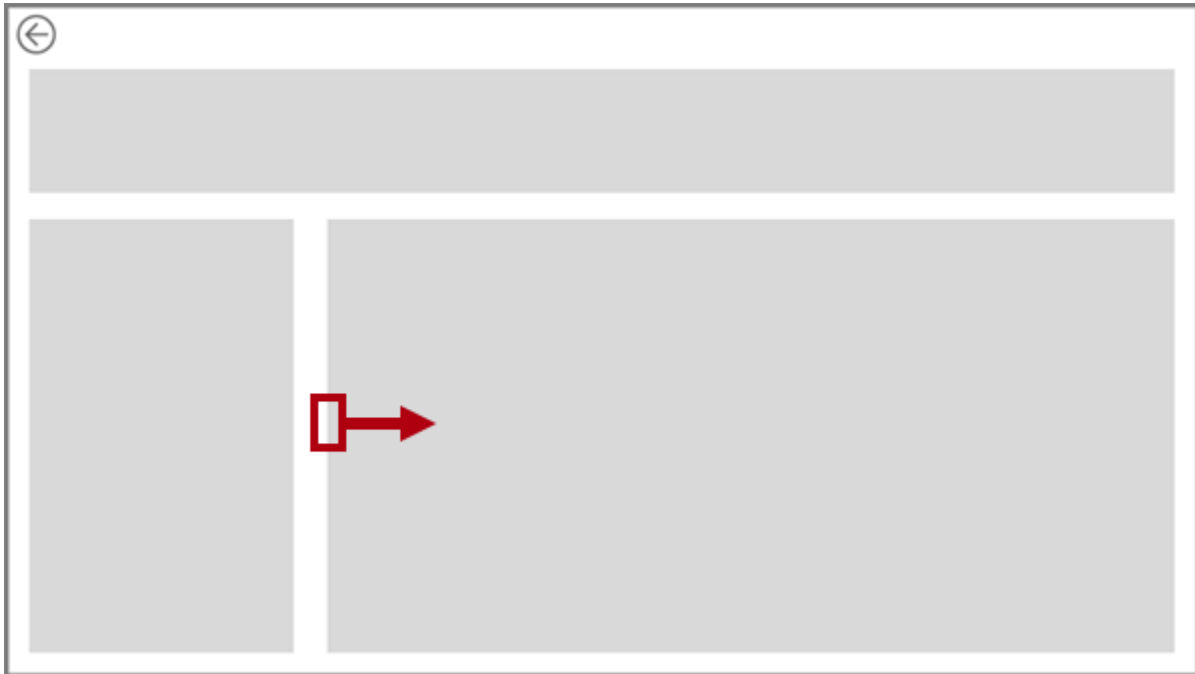
0. In the Power BI report (opened in **Task 1**), on the menu bar, click **Edit**.



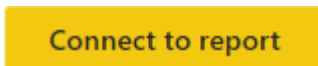
1. To remove the table visual, first select it, and then press the **Delete** key.
2. To add a paginated report visual, in the **Visualizations** pane, select the Paginated report visual icon.



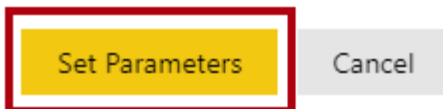
3. Resize the visual by reducing the width, providing space between the multi-row card visual and the paginated report visual.



4. Inside the paginated report visual, click **Connect to Report**.

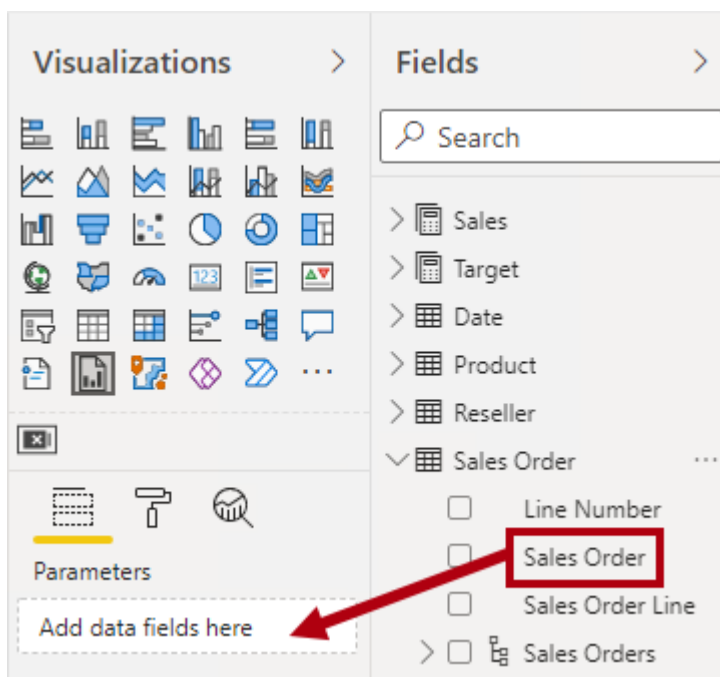


5. Select the **Sales Order** report.
6. Click **Set Parameters**.



7. In the **Fields** pane (located at the right), expand the **Sales Order** table.

8. From the **Sales Order** table, drag the **Sales Order** field into the **Parameter** well.



9. Inside the paginated report visual, in the **Power BI Field** dropdown list, select the **Sales Order** field.

Parameter	Use default	Power BI field	Value
ab SalesOrderNumber	<input type="checkbox"/> Off	<div><div>Sales Order</div><div>▼</div></div>	SO71783

10. Click **See Report**.

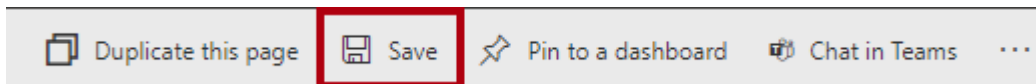


11. Verify that the paginated report loads.
12. At the bottom-left, select the **Sales Analysis** page.



Selecting this page ensures that it is the first page a report user sees.

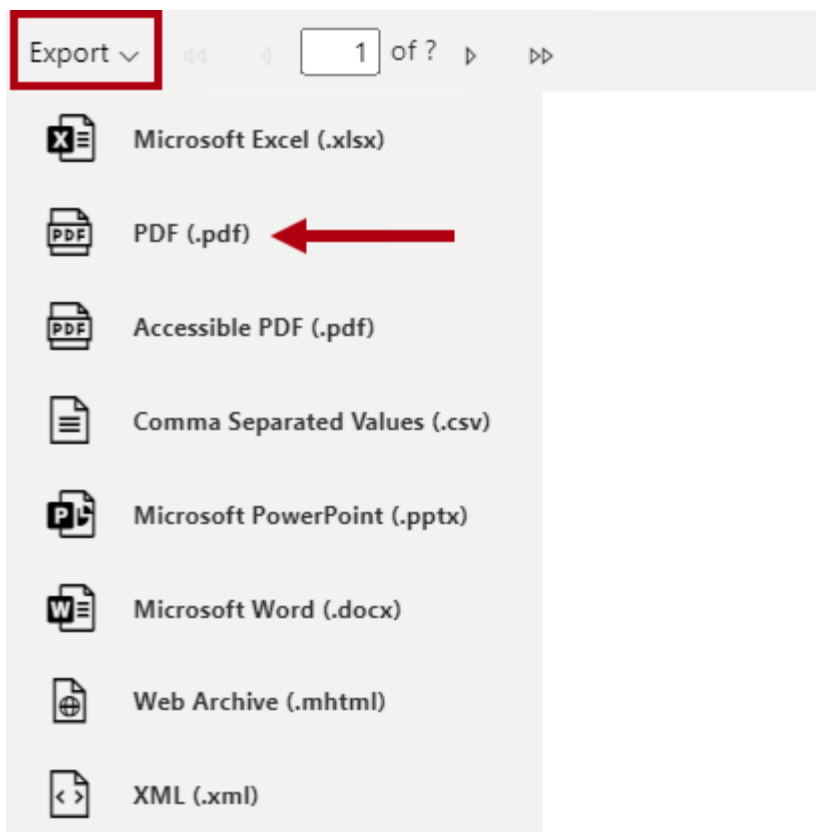
13. To save the report, on the menu bar, click **Save**.



Task 4: Review the Power BI report

In this task, you will use the paginated report visual to export the sales order as a PDF document.

0. Drill through to the **Sales Orders** page from either of the June columns.
1. Drill through to the **Sales Order Detail** page from the **SO71783** sales order.
2. When the paginated report loads, in the **Export** menu, select **PDF**.



3. When the PDF document downloads, open it, and then review the report page.

Because the PDF document represents a well-designed, multi-page layout of the sales order and its order lines.

Summary

In this lab, you used the paginated report visual to embed the **Sales Order** paginated report into the **Sales Analysis** Power BI report.

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