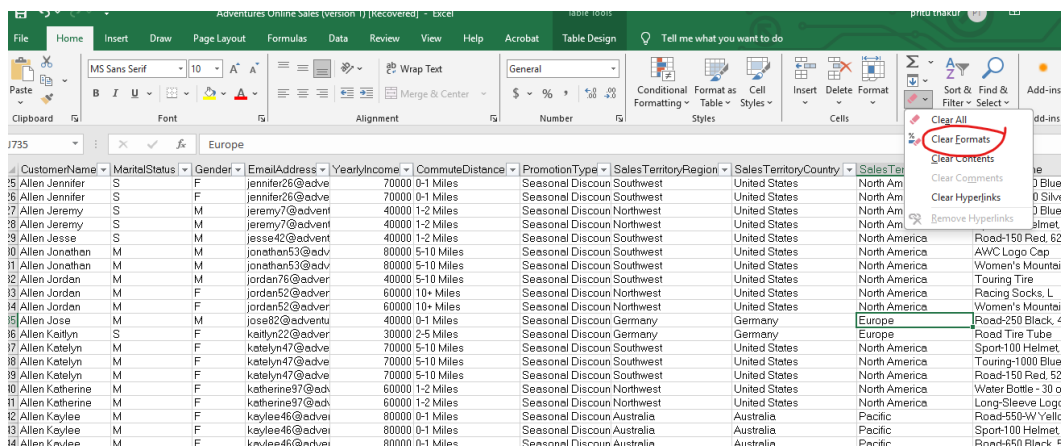


# CASE STUDY - Using Files as a Data Source

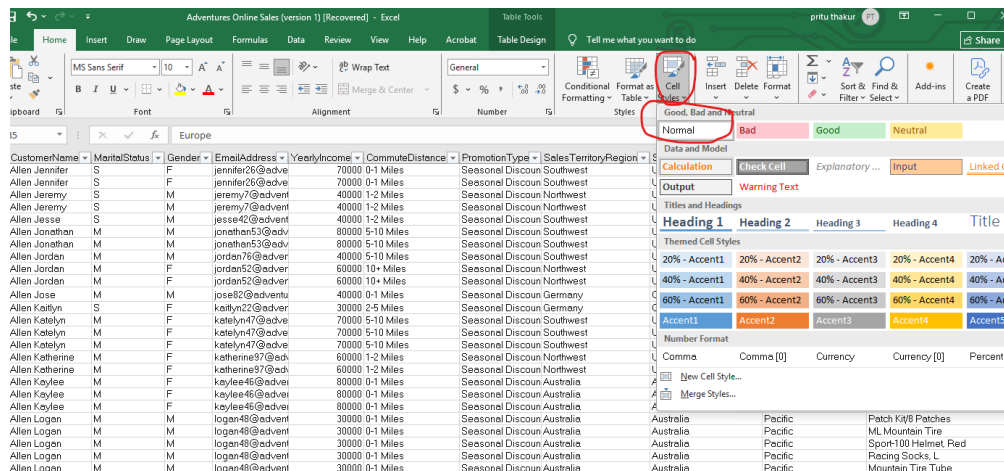
## The tasks to be completed:

### 1. Reduce the size of the Excel file by formatting it.

Solution: On home tab on excel ribbon → Editing → Clear → Clear Format.

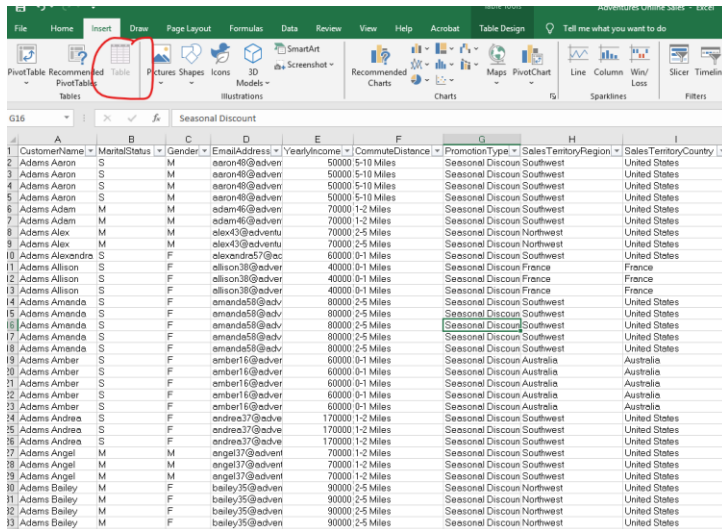


### 2. Change the cell style to normal.

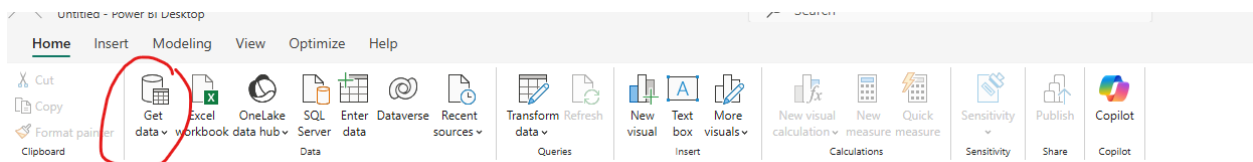


### 3.Convert the cells into table.

Since its already in table format option is greyed out in Insert ribbon.

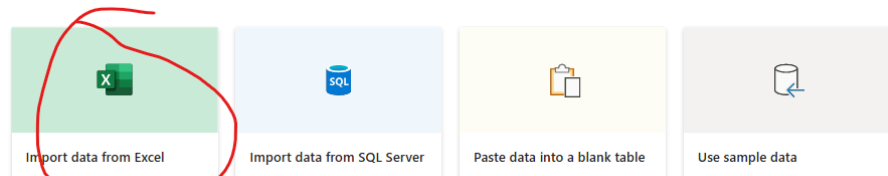


### Import Adventure Sales excel file into Power BI Desktop.



#### Add data to your report

Once loaded, your data will appear in the Data pane.



Get data from another source →

DataverseRecent sourcesTransform dataRefreshNew visualText boxMore visualsNew visual calculationNew measureQuick measureSensitivityPublishCopilot

QueriesInsertCalculationsSensitivityShareCopilot

Navigator

Display Options

Adventures Online Sales.xlsx [3]

☐ Table1

☒ Sales

☐ AWInternetSales

Sales

CustomerName	MaritalStatus	Gender	EmailAddress
Adams Aaron	S	M	aaron48@adventure-works.com
Adams Aaron	S	M	aaron48@adventure-works.com
Adams Aaron	S	M	aaron48@adventure-works.com
Adams Aaron	S	M	aaron48@adventure-works.com
Adams Adam	M	M	adam46@adventure-works.com
Adams Adam	M	M	adam46@adventure-works.com
Adams Alex	M	M	alex43@adventure-works.com
Adams Alex	M	M	alex43@adventure-works.com
Adams Alexandra	S	F	alexandra57@adventure-works.com
Adams Allison	S	F	allison38@adventure-works.com
Adams Allison	S	F	allison38@adventure-works.com
Adams Allison	S	F	allison38@adventure-works.com
Adams Amanda	S	F	amanda58@adventure-works.com
Adams Amanda	S	F	amanda58@adventure-works.com
Adams Amanda	S	F	amanda58@adventure-works.com
Adams Amanda	S	F	amanda58@adventure-works.com
Adams Amanda	S	F	amanda58@adventure-works.com
Adams Amber	S	F	amber16@adventure-works.com
Adams Amber	S	F	amber16@adventure-works.com
Adams Amber	S	F	amber16@adventure-works.com
Adams Amber	S	F	amber16@adventure-works.com
Adams Amber	S	F	amber16@adventure-works.com

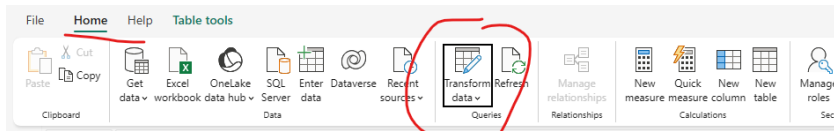
The data in the preview has been truncated due to size limits.

LoadTransform DataCancel

Data Loaded.

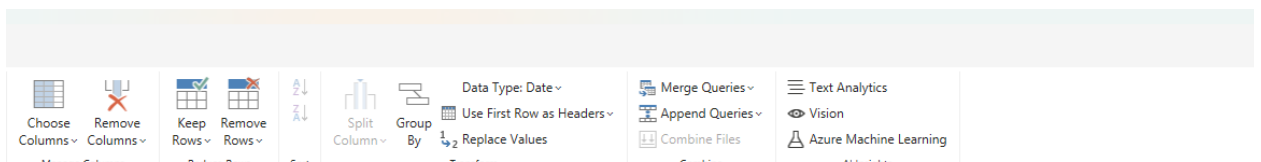
## 5.Convert the Order Date, Due Date and ShipDate to a Date type in Power BI Desktop.

Solution: Ctrl+Select 3 Columns → right click → Change type → Date



The screenshot shows the Power BI Desktop ribbon with the 'Transform data' button circled in red. Below the ribbon, a table of data is displayed with columns: SalesTerritoryRegion, SalesTerritoryCountry, SalesTerritoryGroup, ProductName, Color, ReorderPoint, ProductSubcategory, and ProductID. The table contains 20 rows of data.

SalesTerritoryRegion	SalesTerritoryCountry	SalesTerritoryGroup	ProductName	Color	ReorderPoint	ProductSubcategory	ProductID
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Ac
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Ac
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Ac
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Ac
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Ac
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Ac
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Ac
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Ac
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Ac
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Ac
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Ac
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Ac
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Ac
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Ac
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Ac
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Ac
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Ac
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Ac
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Ac
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Ac
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Ac



The screenshot shows the Power BI Desktop ribbon with the 'Change Type' button circled in red. Below the ribbon, a table of data is displayed with columns: ProductCategory, OrderDate, DueDate, ShipDate, and SalesAmount. The table contains 20 rows of data. A context menu is open over the 'OrderDate' column, showing the 'Change Type' option selected, with the 'Date' option highlighted in the submenu.

ProductCategory	OrderDate	DueDate	ShipDate	SalesAmount
Accessories	10/30/2007	11/11/2007		
Clothing	10/30/2007	11/11/2007		
Accessories	10/30/2007	11/11/2007		
Accessories	6/15/2008	6/27/2008		
Accessories	6/15/2008	6/27/2008		
Bikes	2/26/2008	3/9/2008		
Accessories	2/26/2008	3/9/2008		
Bikes	1/3/2006	1/15/2006		
Clothing	4/8/2008	4/20/2008		
Bikes	4/8/2008	4/20/2008		
Bikes	3/26/2007	4/7/2007		
Accessories	5/28/2008	6/9/2008		
Clothing	5/28/2008	6/9/2008		
Accessories	10/17/2007	10/29/2007	10/24/2007	
Accessories	10/17/2007	10/29/2007	10/24/2007	
Accessories	10/17/2007	10/29/2007	10/24/2007	
Accessories	4/11/2008	4/23/2008	4/18/2008	
Clothing	4/11/2008	4/23/2008	4/18/2008	
Clothing	4/11/2008	4/23/2008	4/18/2008	

## 6. Convert the Standard Cost, Sales Amount, Tax Amt to the US Dollar Currency type.

Solution: Following same steps as above fir currency as well

Table: TransformColumnTypes(#"Promoted Headers",{"CustomerName", type text}, {"MaritalStatus", type text}, {"Gender", type text}, {"EmailAddress", type text}, {"YearlyIncome", type text}, {"StandardCost", type text}, {"SalesAmount", type text}, {"TaxAmt", type text})

ProductSubcategory	ProductCategory	OrderDate	DueDate	ShipDate	StandardCost	SalesAmount	TaxAmt
1s and Tubes	Accessories	39385	39397	39392	1.49	3.99	0.32
2eys	Clothing	39385	39397	39392	41.57	53.99	4.32
3mets	Accessories	39385	39397	39392	13.09	34.99	2.80
4s and Tubes	Accessories	39385	39397	39392	9.35	24.99	2.00
5iders	Accessories	39614	39626	39621	8.22	21.98	1.76
6e Racks	Accessories	39614	39626	39621	44.88	120.00	9.60
7jd Bikes	Bikes	39504	39516	39511	1,082.51	1,700.99	136.08
8mets	Accessories	39504	39516	39511	13.09	34.99	2.80
9jd Bikes	Bikes	38720	38732	38727	2,171.29	3,578.27	286.26
10eys	Clothing	39546	39558	39553	38.49	49.99	4.00
11untain Bikes	Bikes	39546	39558	39553	419.78	769.49	61.56
12jd Bikes	Bikes	39167	39179	39174	486.71	782.99	62.64
13mets	Accessories	39596	39608	39603	13.09	34.99	2.80
14ves	Clothing	39596	39608	39603	9.16	24.49	1.96
15s and Tubes	Accessories	39372	39384	39379	13.09	35.00	2.80
16s and Tubes	Accessories	39372	39384	39379	1.87	4.99	0.40
17mets	Accessories	39372	39384	39379	13.09	34.99	2.80
18mets	Accessories	39549	39561	39556	13.09	34.99	2.80

## 7. Load Sales table into Power BI Desktop

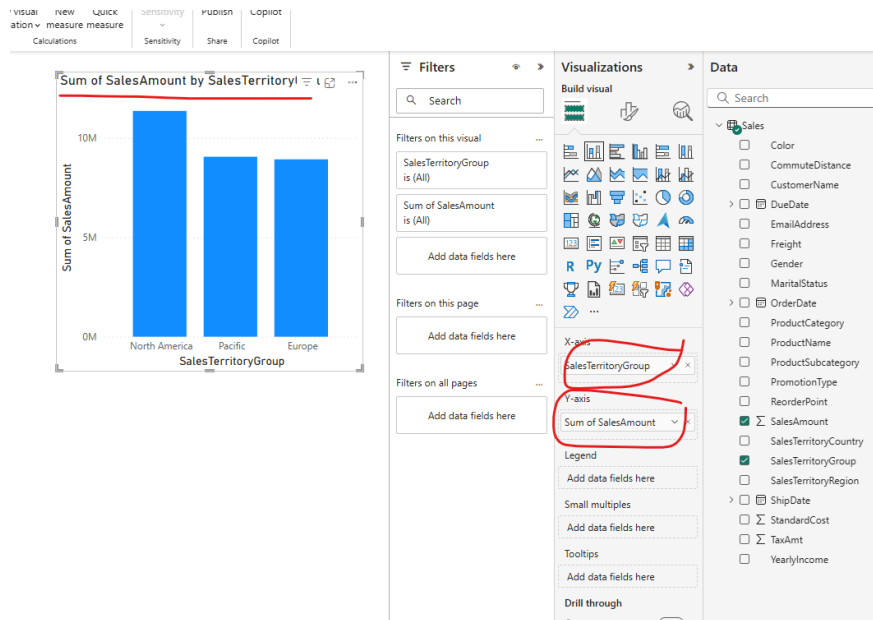
Solution: Already performed in Task 4 import Adventure Sales excel file into Power BI Desktop

Table: Sales

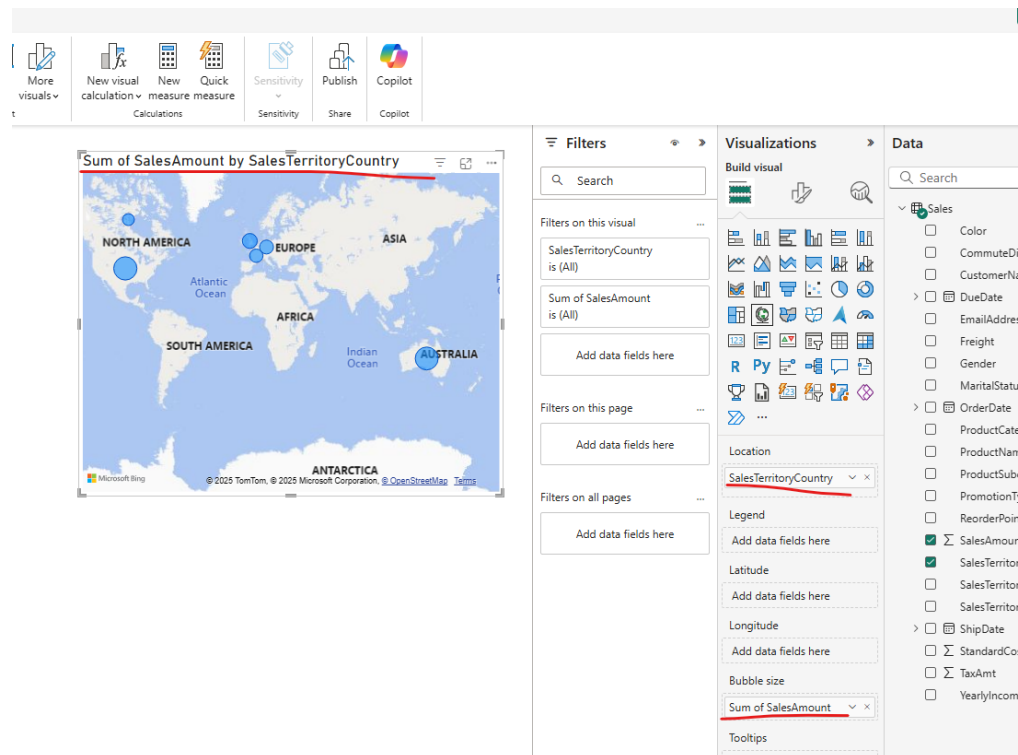
SalesTerritoryRegion	SalesTerritoryCountry	SalesTerritoryGroup	ProductName	Color	ReorderPoint	ProductSubcategory	ProductCategory	OrderDate	DueDate	ShipDate	StandardCost	SalesAmount
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Accessories	39573	39585	39580	1.8663	
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Accessories	39396	39408	39403	1.8663	
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Accessories	39478	39490	39485	1.8663	
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Accessories	39649	39661	39656	1.8663	
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Accessories	39514	39526	39521	1.8663	
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Accessories	39348	39360	39355	1.8663	
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Accessories	39533	39545	39540	1.8663	
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Accessories	39574	39586	39581	1.8663	
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Accessories	39494	39506	39501	1.8663	
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Accessories	39465	39477	39472	1.8663	
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Accessories	39451	39463	39458	1.8663	
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Accessories	39413	39425	39420	1.8663	
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Accessories	39603	39615	39610	1.8663	
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Accessories	39472	39484	39479	1.8663	
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Accessories	39398	39410	39405	1.8663	
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Accessories	39425	39437	39432	1.8663	
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Accessories	39572	39584	39579	1.8663	
Southwest	United States	North America	Mountain Tire Tube	NA	375	Tires and Tubes	Accessories	39418	39430	39425	1.8663	

## 8. Create a Column chart of Sales Amount vs Sales Territory Group.

### Solution



## 9. Create a Map Visual with Sales Territory Country and Sales Amount.



## 10. Display the Top 10 products based on the sales Amount.

The screenshot displays the Microsoft Power BI interface. On the left, a table shows the top 10 products by sales amount. The table has two columns: 'ProductName' and 'Sum of SalesAmount'. The data is as follows:

ProductName	Sum of SalesAmount
Mountain-200 Black, 38	1,294,866.14
Mountain-200 Black, 42	1,363,142.09
Mountain-200 Black, 46	1,373,469.55
Mountain-200 Silver, 38	1,339,462.79
Mountain-200 Silver, 42	1,257,434.57
Mountain-200 Silver, 46	1,301,100.10
Road-150 Red, 48	1,205,876.99
Road-150 Red, 52	1,080,637.54
Road-150 Red, 56	1,055,589.65
Road-150 Red, 62	1,202,298.72
<b>Total</b>	<b>12,473,878.14</b>

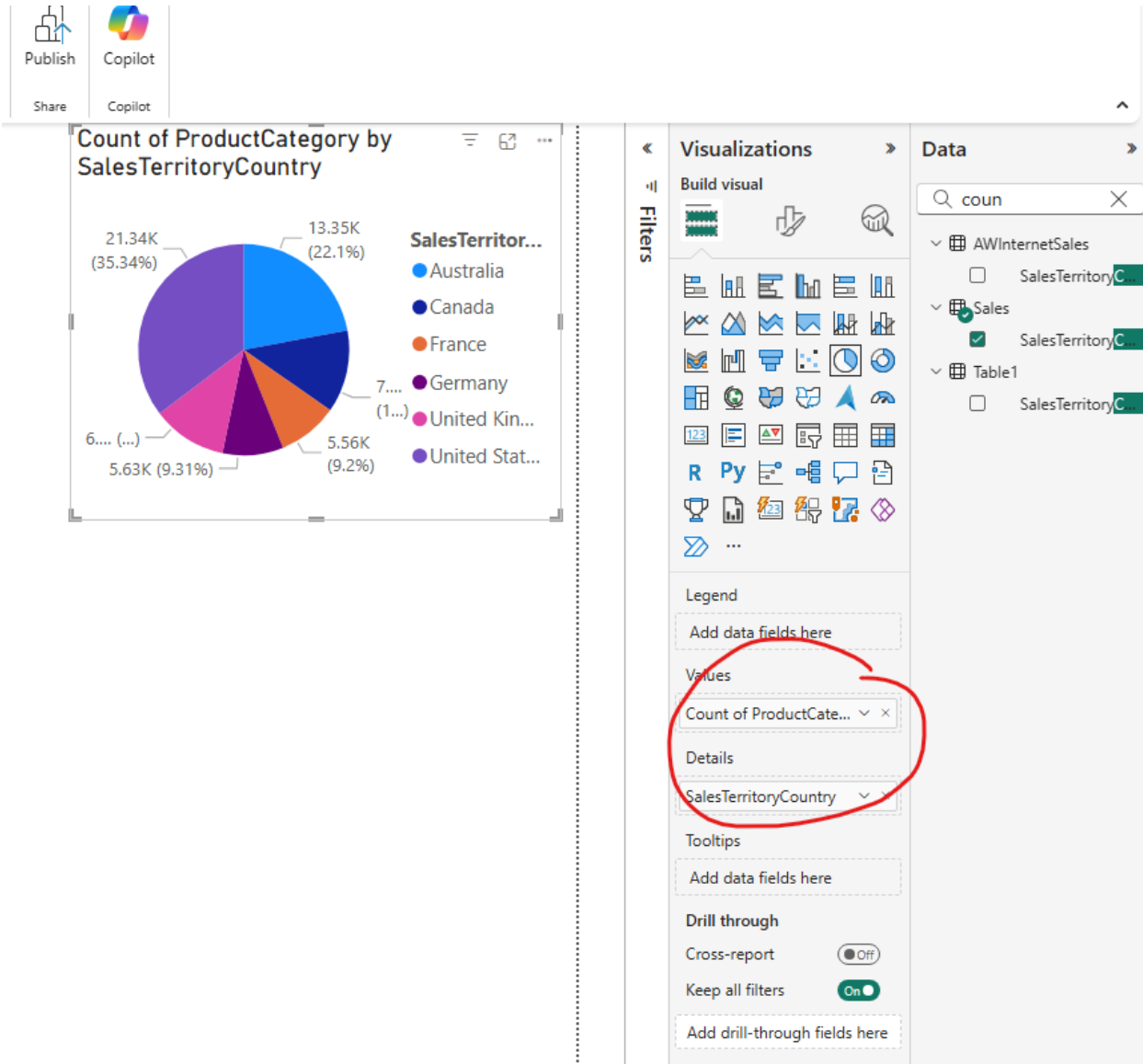
The 'Filters' pane on the right shows the following configuration:

- Filters on this visual:** 'ProductName' is selected with the filter 'top 10 by Sum of Sale...'. The filter type is 'Top N', and the number of items to show is '10'. The filter is applied by the value 'Sum of SalesAmount'.
- Filters on this page:** 'Sum of SalesAmount is (All)'.
- Filters on all pages:** (Empty)

The 'Visualizations' pane shows the 'Columns' section with 'ProductName' and 'Sum of SalesAmount' selected. The 'Drill through' section shows 'Cross-report' set to 'Off' and 'Keep all filters' set to 'On'.

The 'Data' pane on the right shows the 'Sales' table with 'SalesAmount' selected.

## 11. Show the product distribution based on category using a pie chart.





## 12. Save the Report as Adventure Works Excel.

Adventure Works • Last saved: Today at 12:10 PM

File Home Insert Modeling View Optimize Help

Paste Cut Copy Format painter Clipboard

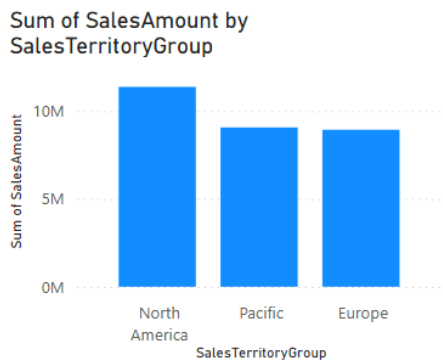
Get data Excel OneLake SQL Server Enter data Data Warehouse Recent sources

Transform Refresh data Queries

New visual Text box More visuals Insert

New visual calculation New Quick measure Sensit

Sum of SalesAmount by SalesTerritoryCountry




Sum of SalesAmount

10M 5M 0M

North America Pacific Europe

SalesTerritoryGroup

Sum of SalesAmount by SalesTerritoryCountry

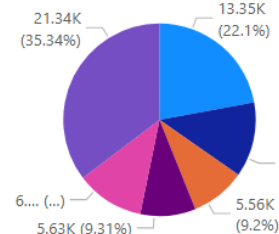


NORTH AMERICA EUROPE ASIA SOUTH AMERICA AFRICA Atlantic Ocean Indian Ocean

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ProductName	Sum of SalesAmount
Mountain-200 Black, 38	1,294,866.14
Mountain-200 Black, 42	1,363,142.09
Mountain-200 Black, 46	1,373,469.55
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Road-150 Red, 52	1,080,637.54
Road-150 Red, 56	1,055,589.65
Road-150 Red, 62	1,202,298.72
<b>Total</b>	<b>12,473,878.14</b>

Count of ProductCategory by SalesTerritoryCountry



21.34K (35.34%) 13.35K (22.1%) 7,000 (1.0%) 5.56K (9.2%) 5.63K (9.31%) 6,000 (1.0%)

SalesTerritoryCountry

- Australia
- Canada
- France
- Germany
- United Kingdom
- United States