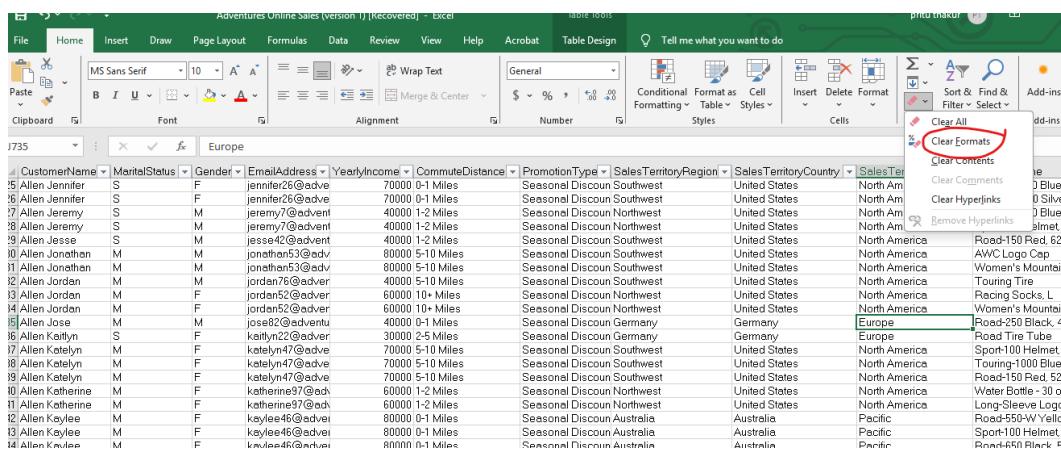


CASE STUDY - Using Files as a Data Source

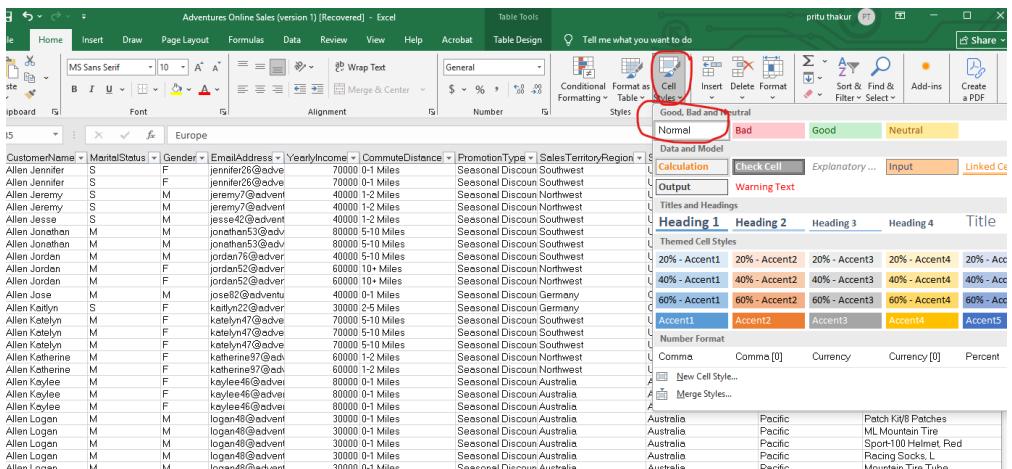
The tasks to be completed:

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.

The screenshot shows the Power BI Desktop ribbon with the 'Data' tab highlighted. The 'Get data' icon (a cylinder with an 'X') is circled in red. Below the ribbon, a callout box points to the 'Import data from Excel' option, which is also circled in red.

Untitled - Power BI Desktop

Home Insert Modeling View Optimize Help

Cut Copy Format painter Clipboard

Get data from Excel workbook Data hub OneLake SQL Server Enter Dataverse Recent sources Transform data Refresh data New visual Text box More visuals New visual calculation New Quick measure Sensitivity Calculations Share Copilot

Add data to your report

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

Import data from Excel Import data from SQL Server Paste data into a blank table Use sample data

Get data from another source →

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.

Load Transform Data Cancel

Import data from:

Display Options

Adventures Online Sales.xlsx [3]

Table1

Sales

AWInternetSales

Navigator

A screenshot of the Power BI Navigator dialog box. On the left, there's a tree view showing 'Adventures Online Sales.xlsx [3]' with 'Table1' expanded, and 'Sales' is selected with a checkmark. Below the tree view is a preview of the 'Sales' table with columns: CustomerName, MaritalStatus, Gender, and EmailAddress. The preview shows multiple rows of data. A red circle highlights the 'Sales' table selection in the tree view. Another red circle highlights the 'Load' button at the bottom right of the dialog box. A third red circle highlights the 'Import data from:' section on the left. A fourth red circle highlights the 'Display Options' dropdown at the top left.

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 interface with the 'Transform data' context menu open over three selected columns: OrderDate, DueDate, and ShipDate. The menu is titled 'Change Type' and includes options like Date, Time, Date/Time, Duration, Text, True/False, Binary, and Using Locale... The 'Date' option is highlighted with a red circle. The main Power BI window displays a table with various columns like SalesTerritoryRegion, SalesTerritoryCountry, SalesTerritoryGroup, ProductName, Color, ReorderPoint, ProductSubcategory, and SalesAmount. The 'Transform data' button in the ribbon is also circled in red.

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

Solution: Following same steps as above for currency as well

The screenshot shows the Power Query Editor interface with the 'Transform' tab selected. The 'Sales' query is open, displaying a table with various columns. The 'StandardCost', 'SalesAmount', and 'TaxAmt' columns are highlighted with red boxes, indicating they are being converted to US Dollar Currency type. The 'Data Type' dropdown for these columns is set to 'Fixed decimal number'.

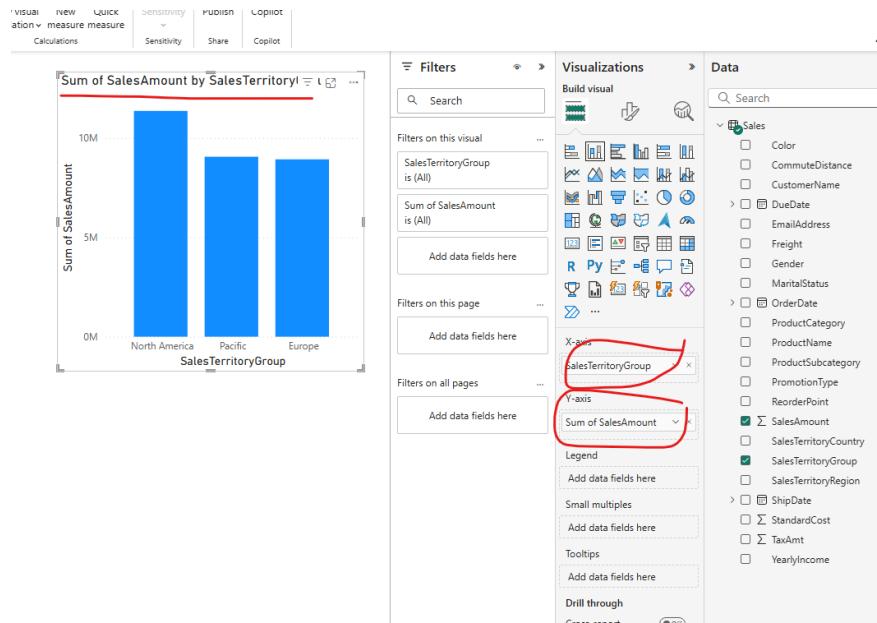
7. Load Sales table into Power BI Desktop

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

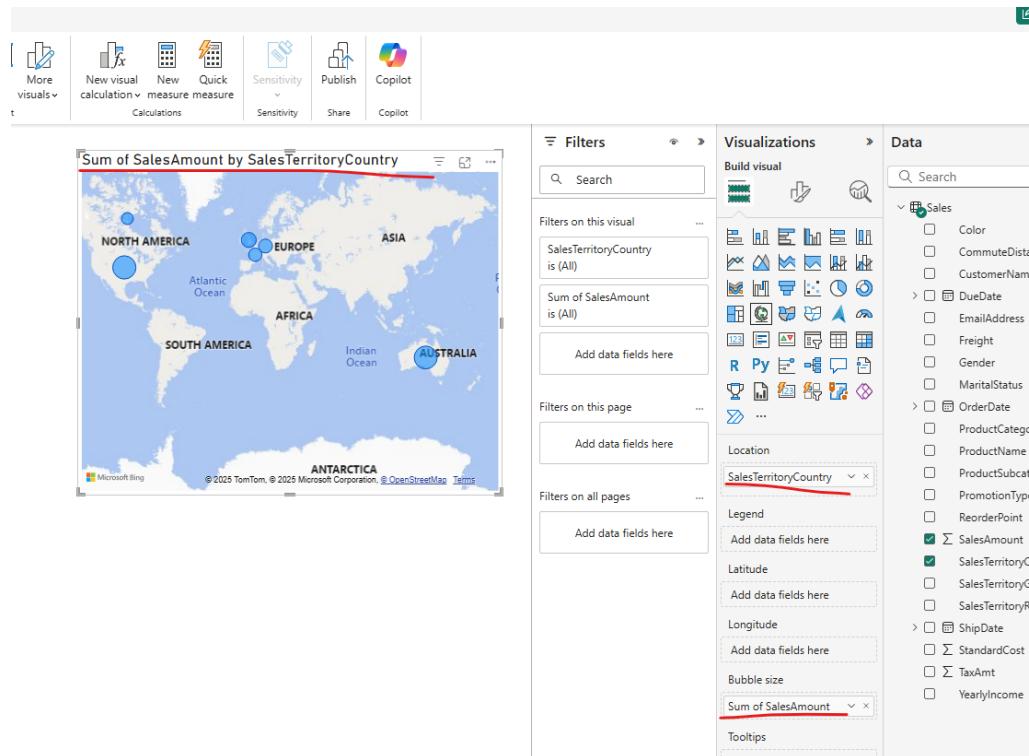
The screenshot shows the Power BI Desktop interface with the 'Home' tab selected. The 'Sales' table is loaded into the workspace. The table structure includes columns like SalesTerritoryRegion, SalesTerritoryCountry, SalesTerritoryGroup, ProductName, Color, ReorderPoint, ProductSubcategory, ProductCategory, OrderDate, DueDate, ShipDate, StandardCost, and SalesAmount.

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 shows the Power BI desktop interface with a table visual and its filter pane open.

Table Visual Data:

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
Total	12,473,878.14

Filter Pane:

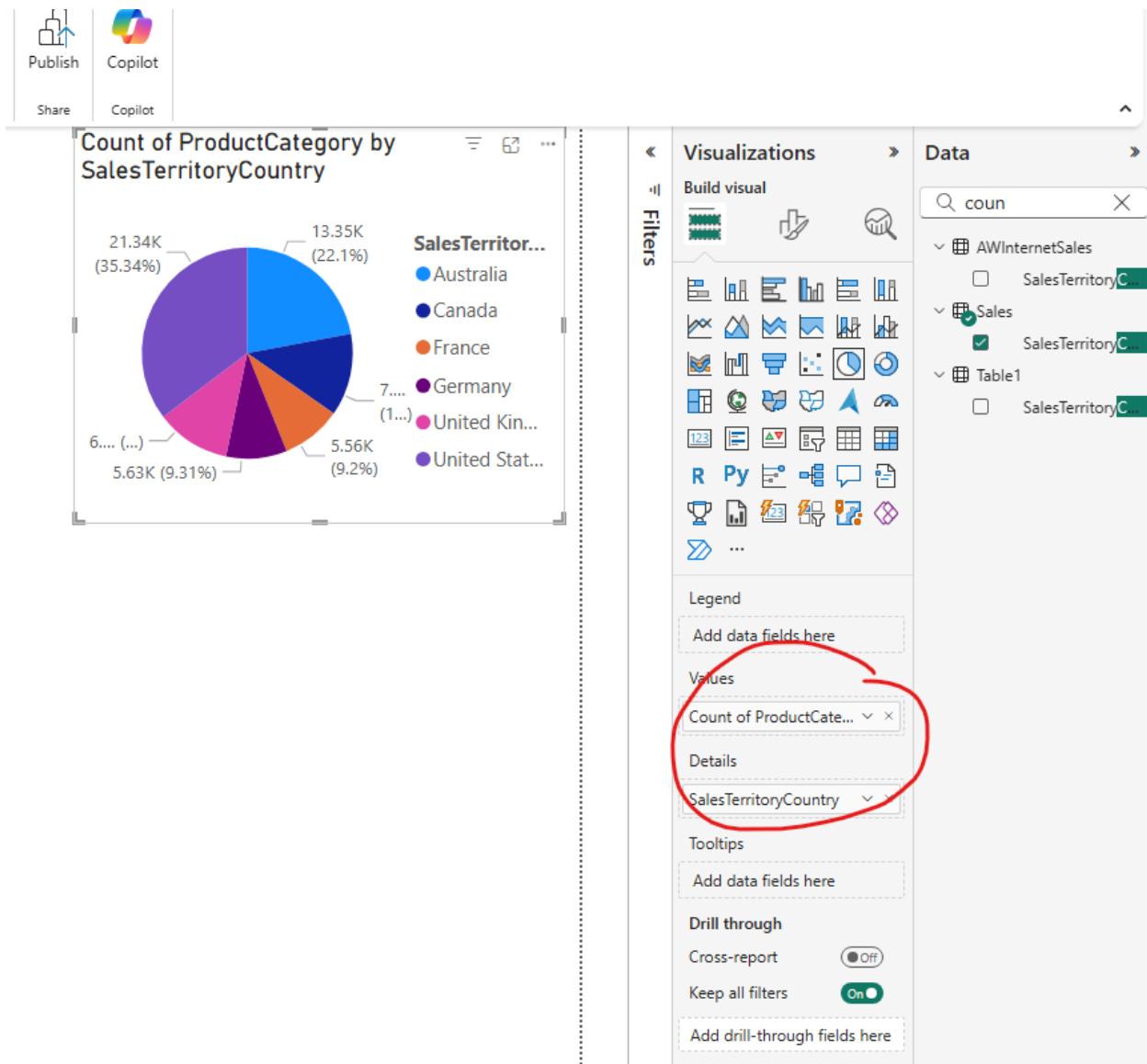
- Filters on this visual:**
 - ProductName top 10 by Sum of Sale...** (highlighted with a red box)
 - Filter type:** Top N (highlighted with a red box)
 - Show items:** Top 10 (highlighted with a red box)
 - By value:** Sum of SalesAmount (highlighted with a red box)
- Sum of SalesAmount is (All)**
- Add data fields here**
- Filters on this page:**
 - Add data fields here**
- Filters on all pages:**
 - Add data fields here**

Visualizations: A grid of visualization icons.

Data:

- Sales:** \sum SalesAmount
- Table1:** \sum SalesAmount

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



12. Save the Report as Adventure Works Excel.

The screenshot shows a Microsoft Power BI report titled "Adventure Works" with a red oval highlighting the top-left corner of the title bar. The title bar also displays the text "Last saved: Today at 12:10 PM".

The report interface includes the following components:

- Home ribbon tab:** Selected tab.
- Clipboard section:** Includes Paste, Cut, Copy, Format painter, and Clipboard buttons.
- Data section:** Includes Get data, Excel workbook, OneLake data hub, SQL Server data, Enter Dataverse, and Recent sources buttons.
- Queries section:** Includes Transform data, Refresh data, New visual, Text box, More visuals, Insert, and Queries buttons.
- Calculations section:** Includes New visual calculation, New measure, Quick measure, and Calculations buttons.
- Sensitivity section:** Includes Sensitivity buttons.

The report contains four visualizations:

- Sum of SalesAmount by SalesTerritoryGroup:** A bar chart showing sales volume across three regions: North America (~10M), Pacific (~8.5M), and Europe (~8.5M).
- Sum of SalesAmount by SalesTerritoryCountry:** A world map showing sales distribution by continent. Major cities like New York, London, and Paris are highlighted with blue dots.
- Count of ProductCategory by SalesTerritoryCountry:** A pie chart showing the distribution of product categories by country. The largest segment is Australia (35.34%), followed by Canada (22.1%), Germany (9.31%), United States (9.2%), France (7.1%), and United Kingdom (5.63%).
- Product Name and Sales Amount:** A table listing products and their total sales amount. The total sales amount is highlighted in bold as **12,473,878.14**.

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
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