

Lesson 6

Topic: Creating Basic Visualizations & Adding Interactivity to Visuals
Prerequisites: Download Sales_Interactive.xlsx file.

1. Name three types of visuals you can create in Power BI

- **Bar Chart (horizontal bars)**
 - **Column Chart (vertical bars)**
 - **Line Chart (trend over time)**
-

2. How do you add a slicer to a report?

- In the **Visualizations** pane, we select the **Slicer** icon.
 - Drag a field (e.g., Quarter) into the slicer.
 - The slicer will filter all visuals on the page.
-

3. What is the difference between a bar chart and a column chart?

- **Bar chart** → horizontal bars, better for long category names.
 - **Column chart** → vertical bars, better for time-series or sequential data.
-

4. How do you change the color of a visual background?

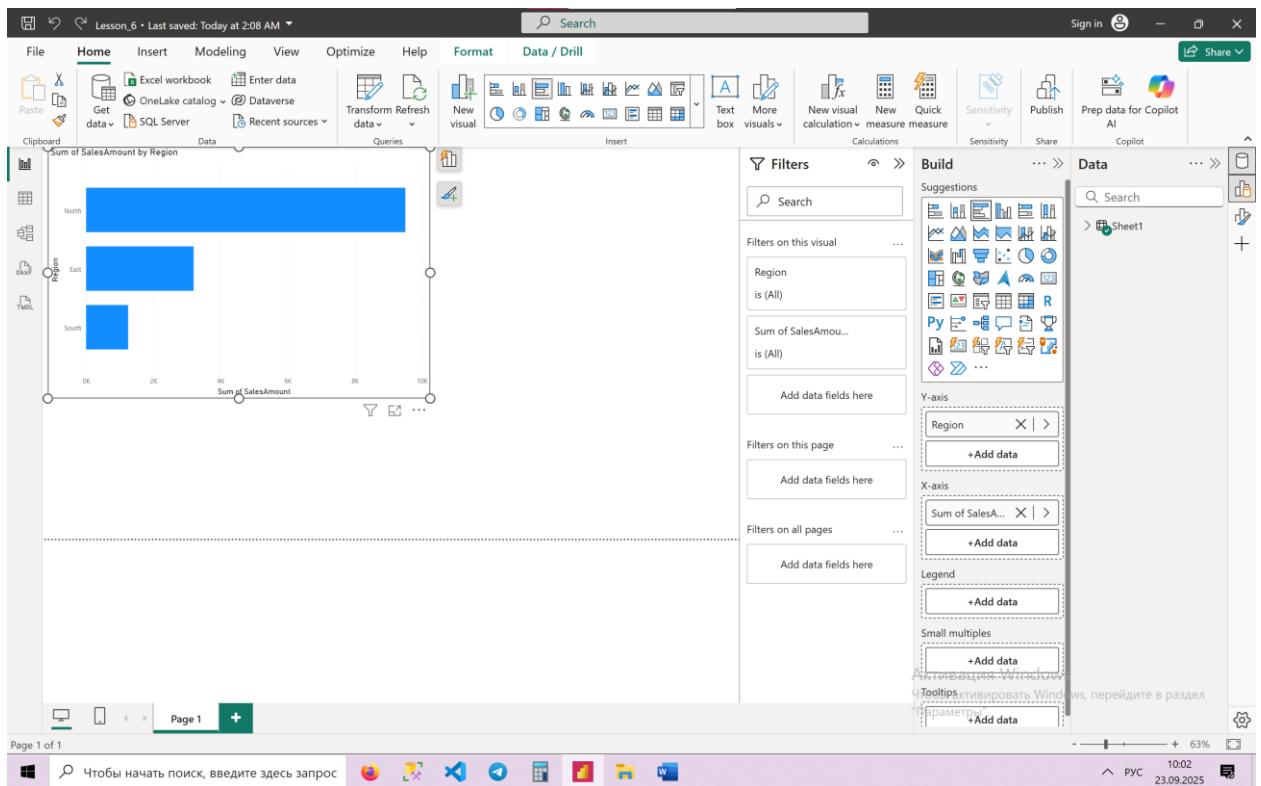
- Select the visual.
 - Go to the **Format (paint roller)** pane → **Background** → choose a color and adjust transparency.
 -
-

5. What does "drill-down" mean in a visual?

Drill-down means navigating deeper into the data hierarchy.
Example: First you see sales by **Region**, then by clicking you can “drill down” into **Product**, and then into **Quarter**.

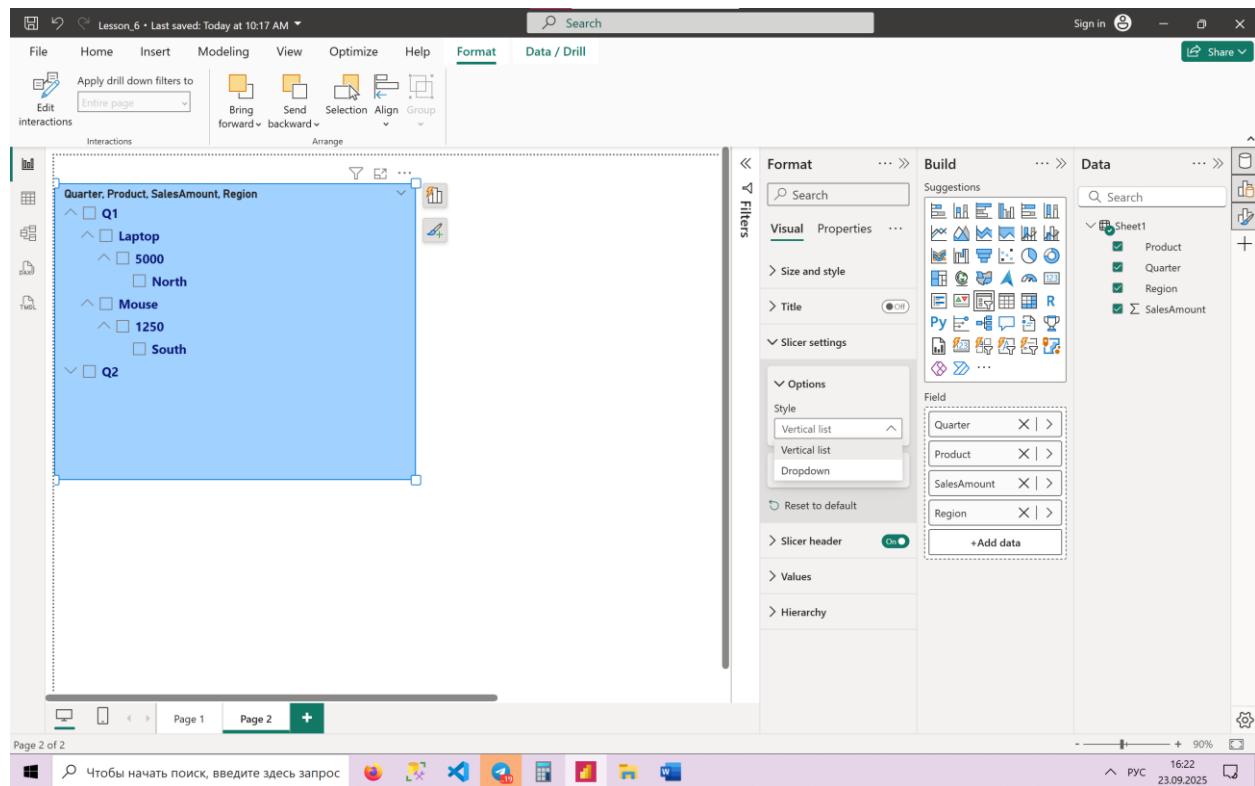
6. Create a bar chart showing SalesAmount by Region

- Drag Region to Axis.
- Drag SalesAmount to Values.
- Choose **Bar Chart** from Visualizations.



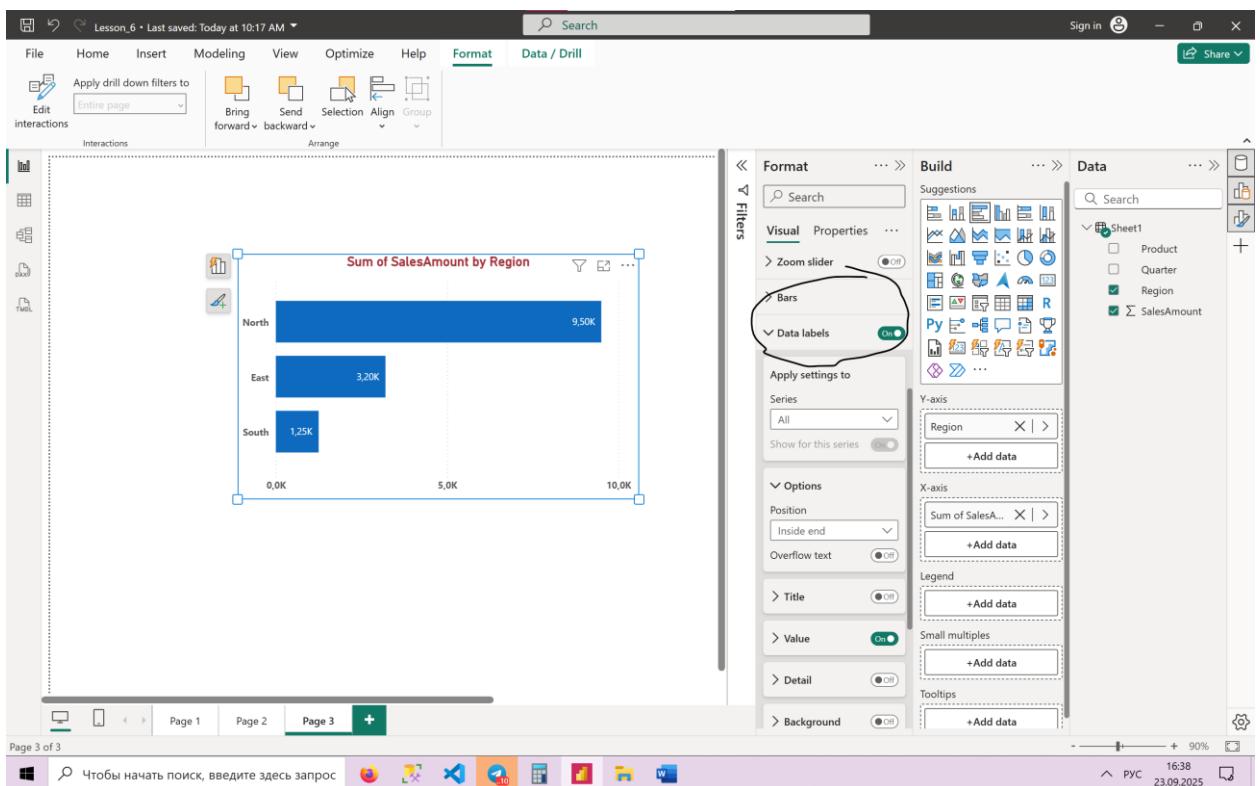
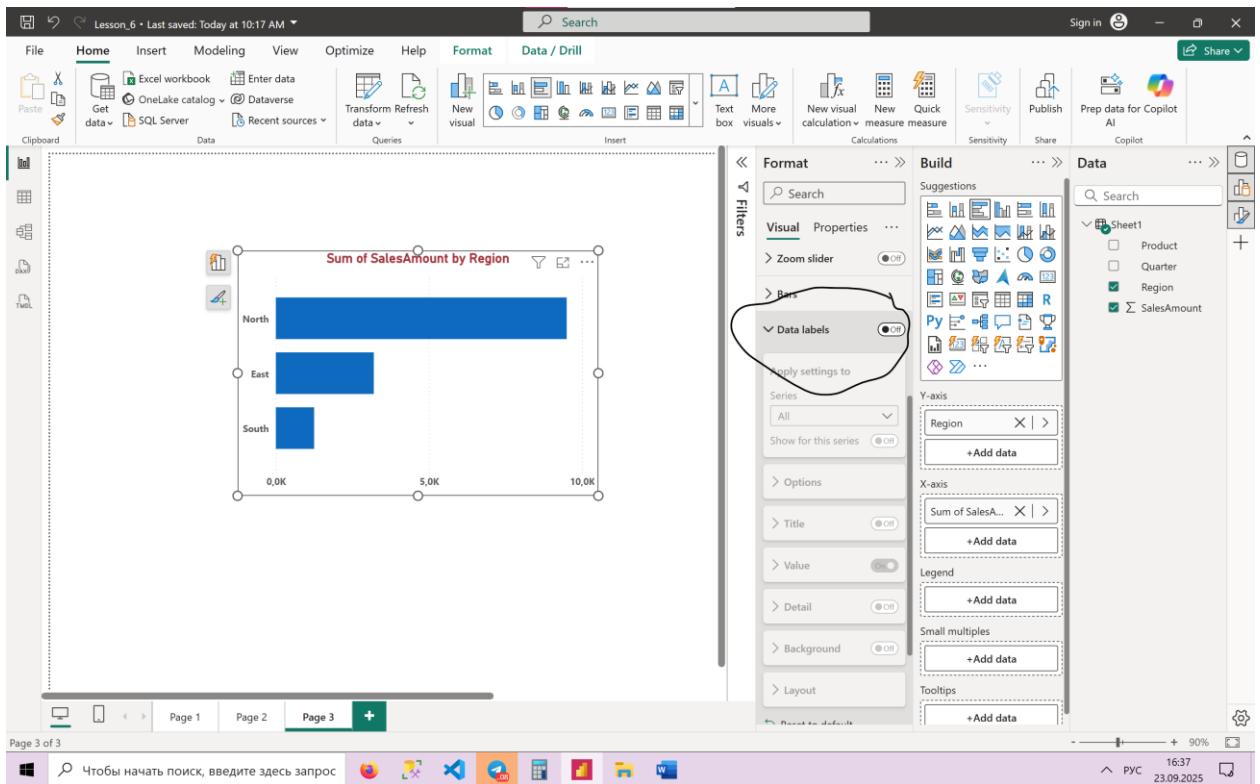
7. Add a slicer for Quarter to filter all visuals on the page

- Insert a **Slicer** visual.
- Drag Quarter into the slicer field.
- Then selecting Q1 or Q2 will filter all visuals.



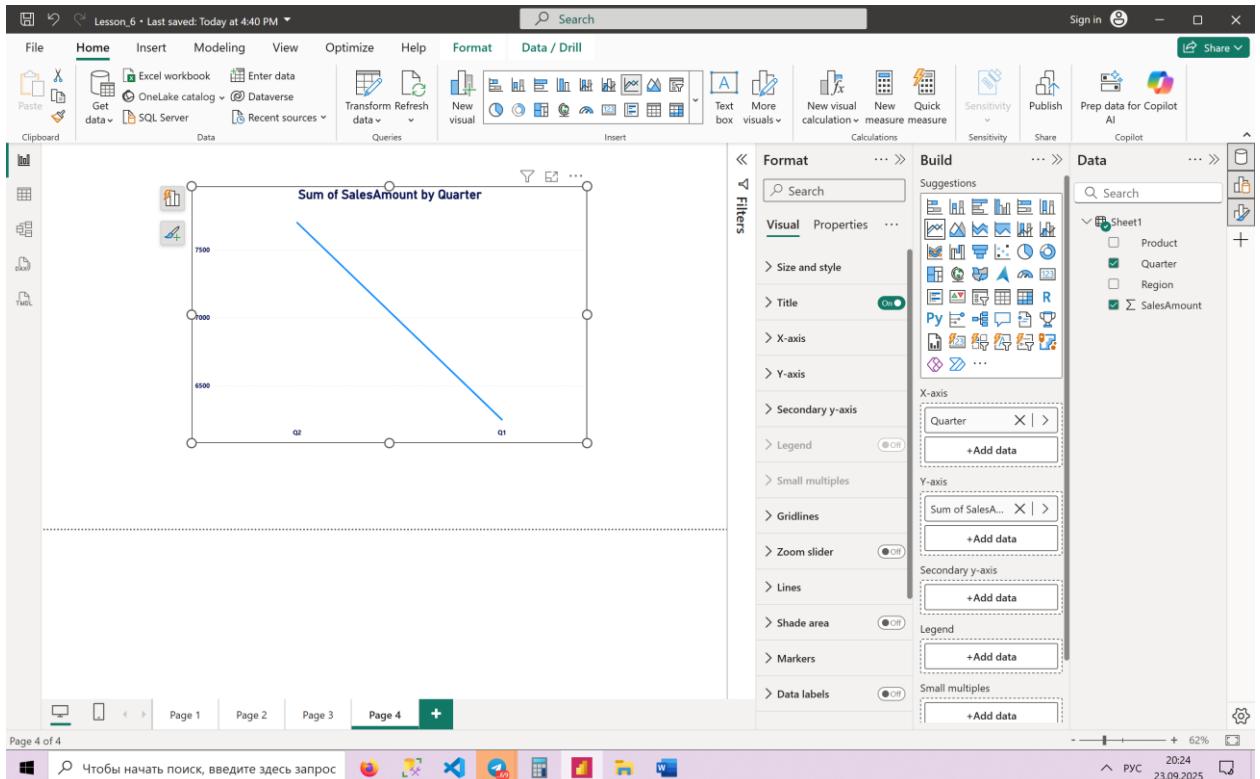
8. Format the bar chart to show data labels

- Select the bar chart.
- Go to **Format → Data Labels → On**.



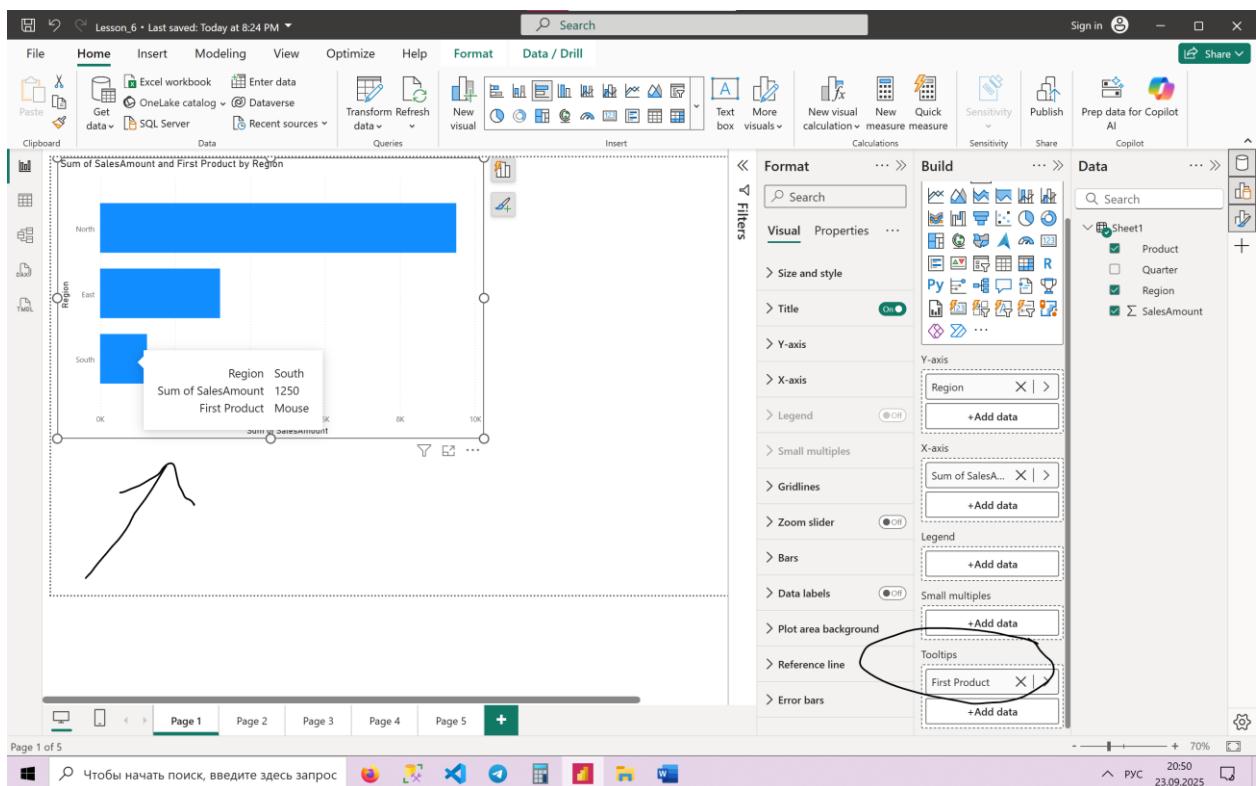
9. Use a line chart to show SalesAmount trends over Quarter

- Choose **Line Chart**.
- Place Quarter on the X-axis.
- Place SalesAmount in Values.



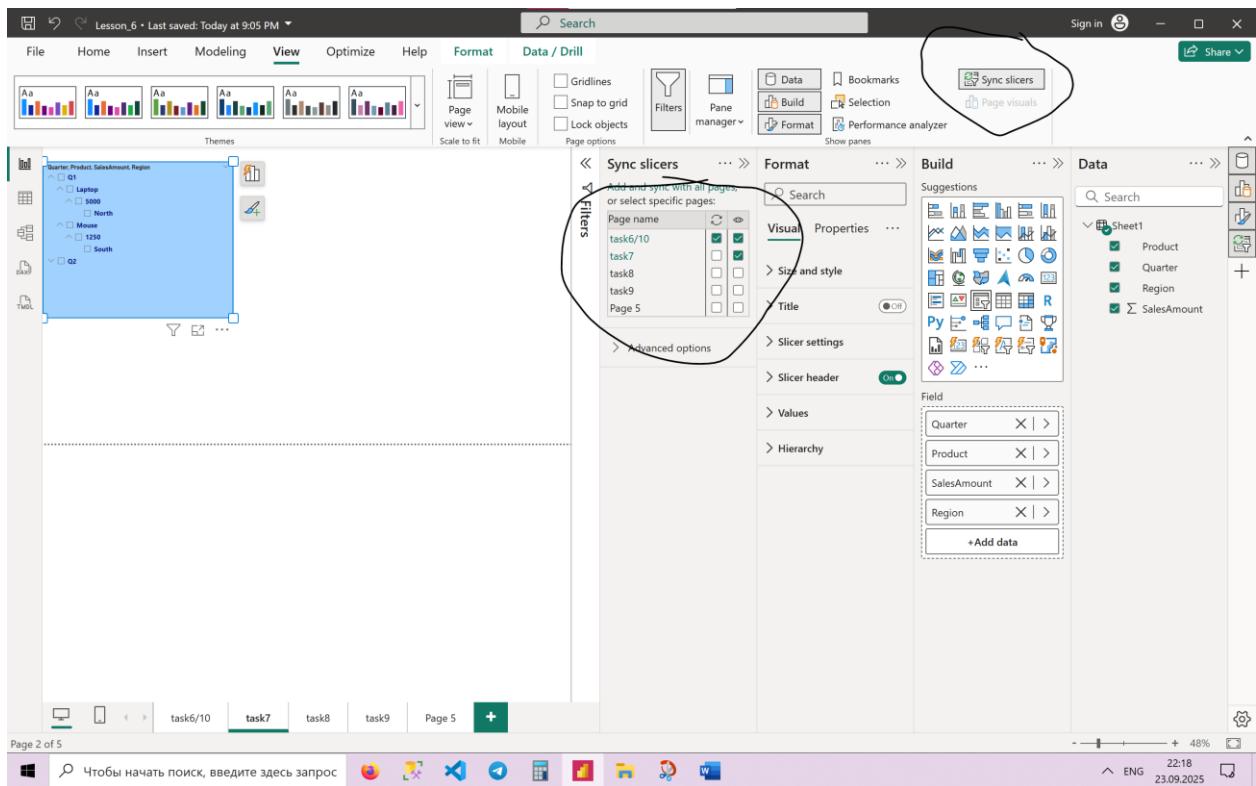
10. Add a tooltip to display Product details when hovering over bars

- Select the bar chart.
- In **Fields** → **Tooltip**, drag Product.
- Then hovering over a bar shows product details.



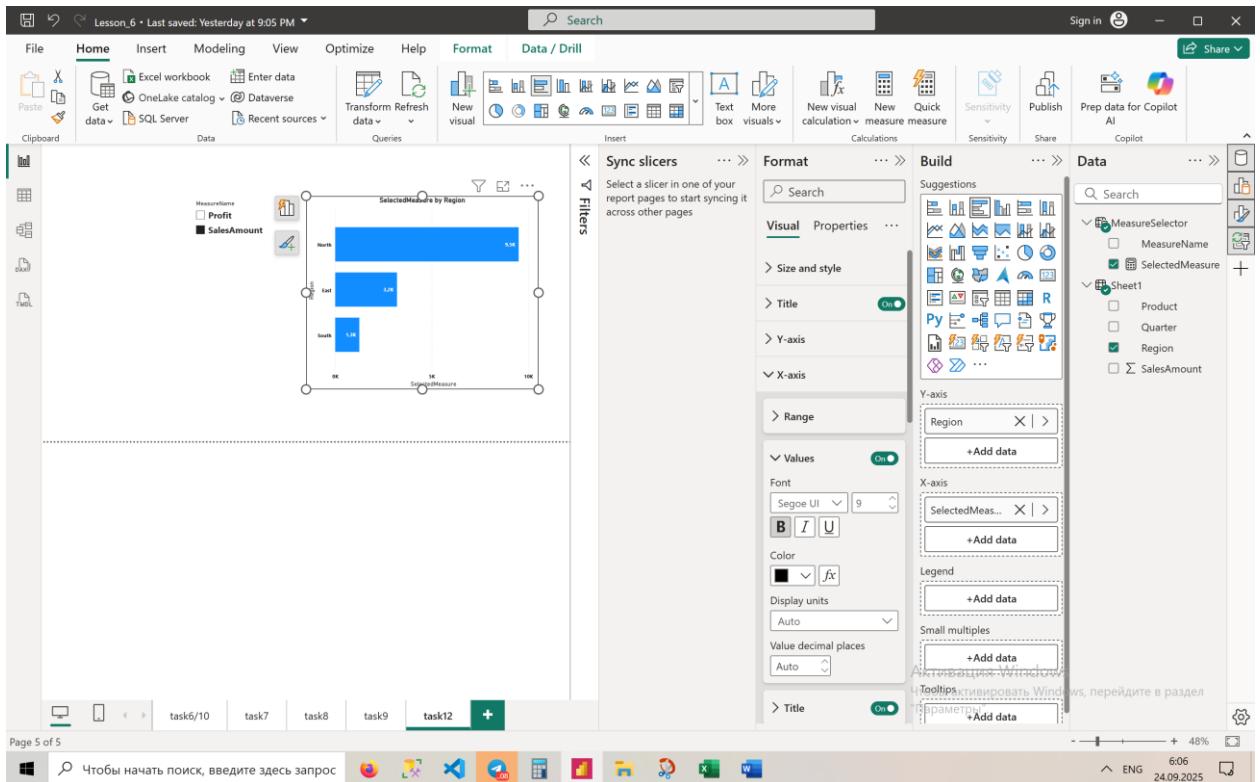
11. Sync slicers across multiple report pages

- Add a slicer on the first page.
- Go to View → Sync Slicers.
- Select the pages where the slicer should apply.



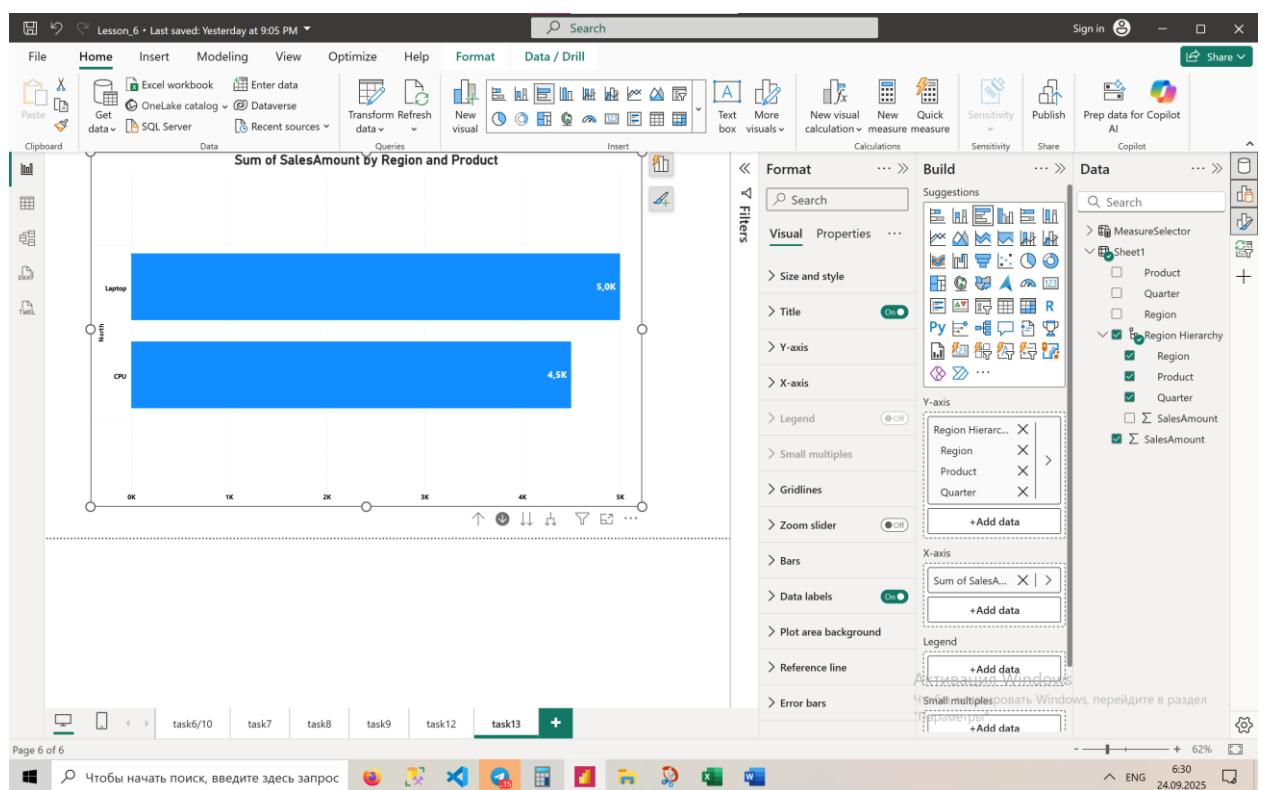
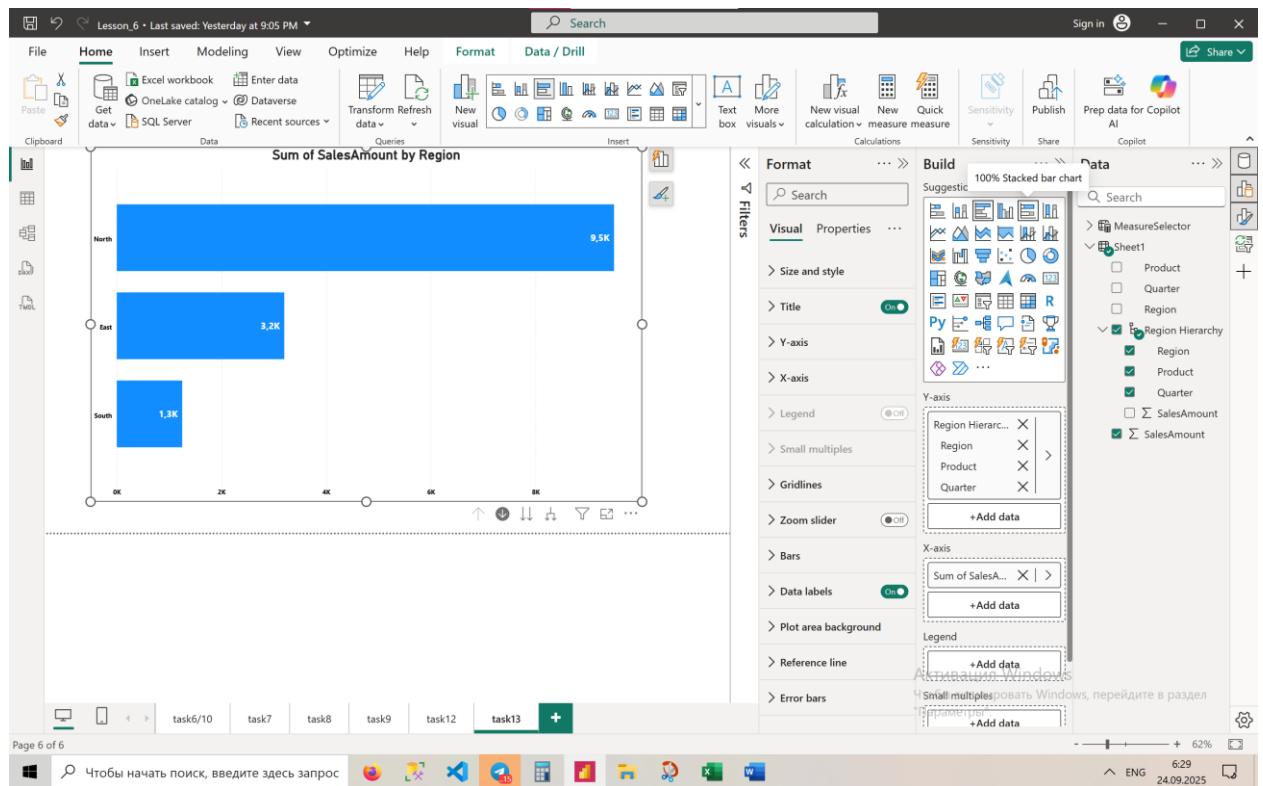
12. Create a custom visual with dynamic measure selection (Sales vs. Profit)

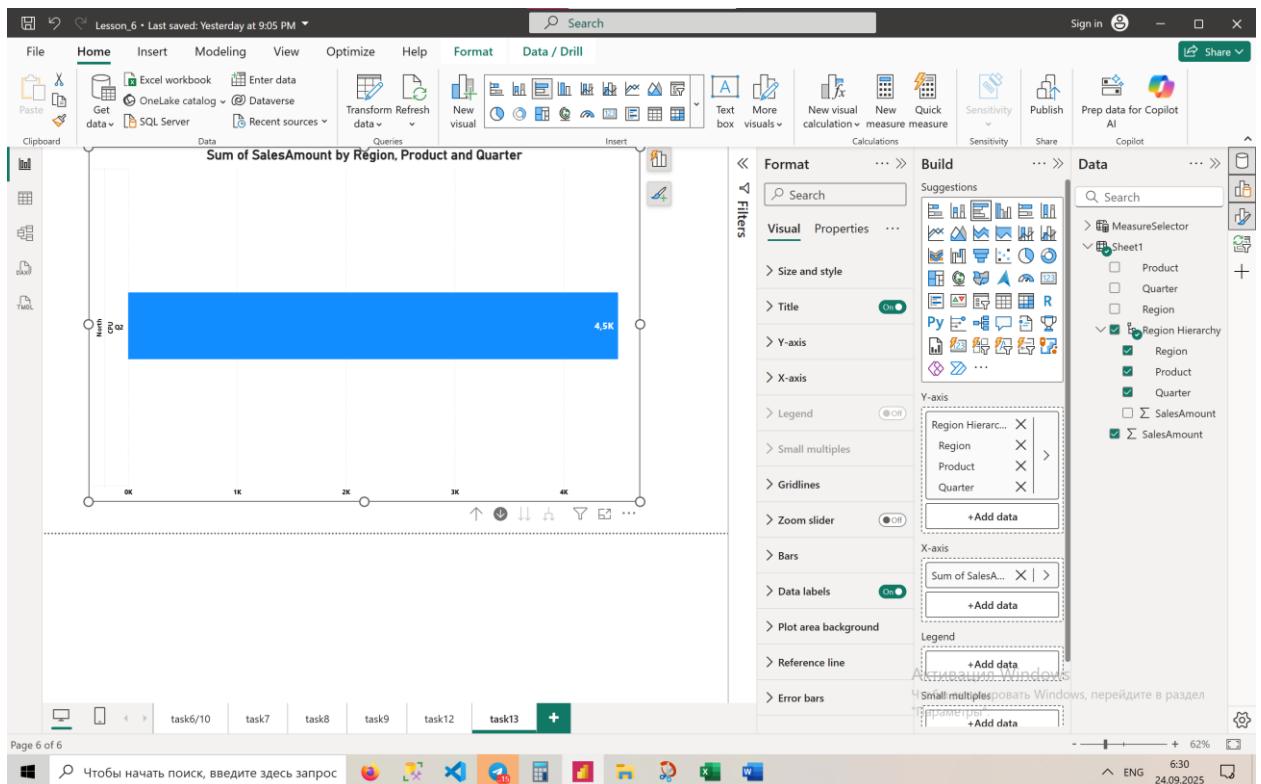
- Create measures like *SalesAmount* and *Profit*.
- Use **Field Parameters** or **What-if Parameter** to switch between measures.
- User can toggle between “Sales” and “Profit” dynamically.



13. Implement a hierarchy for Region > Product > Quarter drill-down

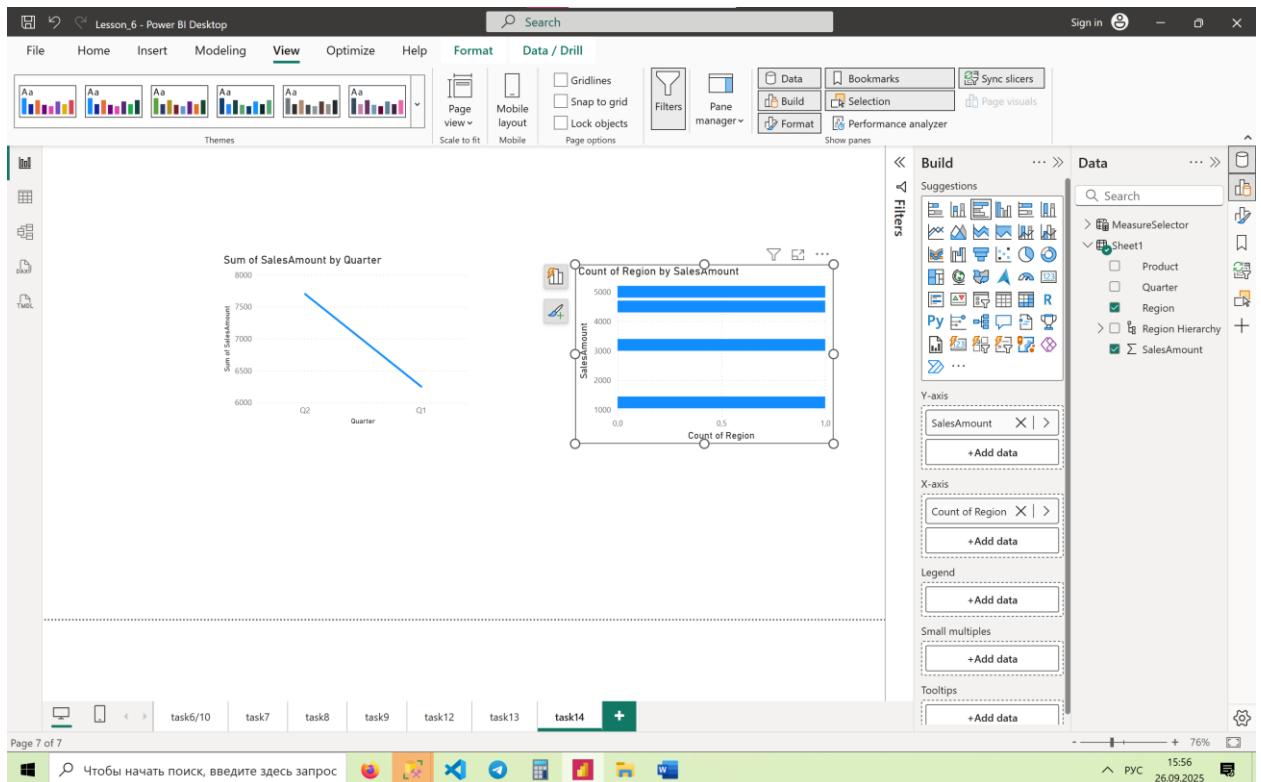
- In the Fields pane, drag Region, then Product, then Quarter into one chart.
- Use the **Drill Down** button (arrows on top of the visual) to navigate the hierarchy.





14. Use bookmarks to toggle between two visuals in the same space

- Place two visuals (e.g., Column Chart and Line Chart) in the same position.
- Open **View** → **Selection Pane** and hide one of them.
- Create a **Bookmark** for each view.
- Add a button to toggle between bookmarks.



Lesson_6 - Power BI Desktop

File Home Insert Modeling View Optimize Help Format Data / Drill

Themes Scale to fit Mobile layout Page options

Filters Page view v Mobile layout Page options

Gridlines Snap to grid Lock objects

Data Bookmarks Sync slicers

Build Selection Format Performance analyzer

Show panes

Filters Selection Bookmarks Data

Search Layer order Tab order Add View

Filters on this visual

- Count of Region is (All)
- SalesAmount is (All)

Add data fields here

Filters on this page

Add data fields here

Filters on all pages

Add data fields here

Show bookmark 1

Show this visual

Count of Region by SalesAmount

SalesAmount

Count of Region

Region Hierarchy

SalesAmount

Learn how to create and edit bookmarks

task6/10 task7 task8 task9 task12 task13 task14 +

Page 7 of 7

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15:57 26.09.2025

This screenshot shows the Power BI Desktop interface with a bar chart visual on the left. The 'Selection' pane is open on the right, displaying various filters applied to the visual. A callout bubble highlights the 'Show this visual' option under the 'Filters' section.

Lesson_6 - Power BI Desktop

File Home Insert Modeling View Optimize Help Format Data / Drill

Themes Scale to fit Mobile layout Page options

Filters Page view v Mobile layout Page options

Gridlines Snap to grid Lock objects

Data Bookmarks Sync slicers

Build Selection Format Performance analyzer

Show panes

Filters Selection Bookmarks Data

Search Layer order Tab order Add View

Filters on this visual

- Count of Region is (All)
- SalesAmount is (All)

Add data fields here

Filters on this page

Add data fields here

Filters on all pages

Add data fields here

Show bookmark 1

Update Rename Delete Group

- ✓ Data
- ✓ Display
- ✓ Current page
- ✓ All visuals
- Selected visuals

Learn how to create and edit bookmarks

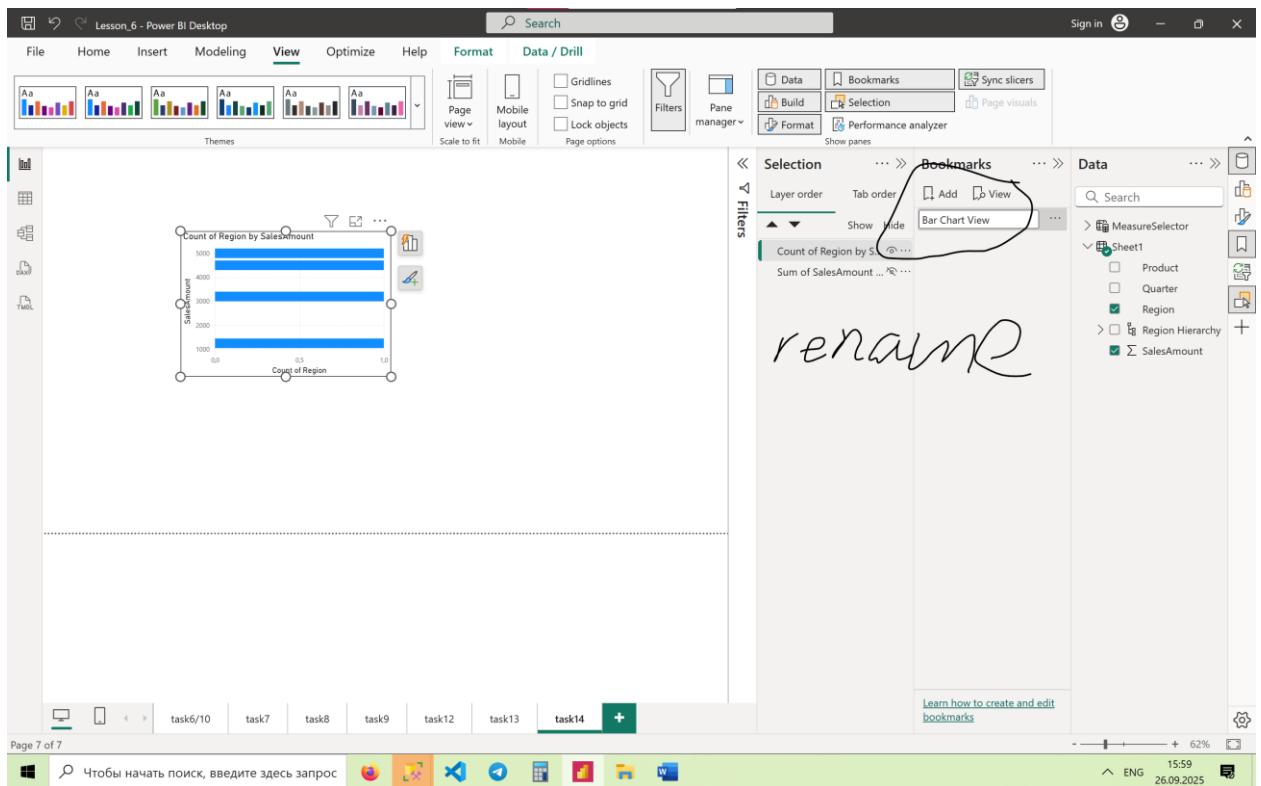
task6/10 task7 task8 task9 task12 task13 task14 +

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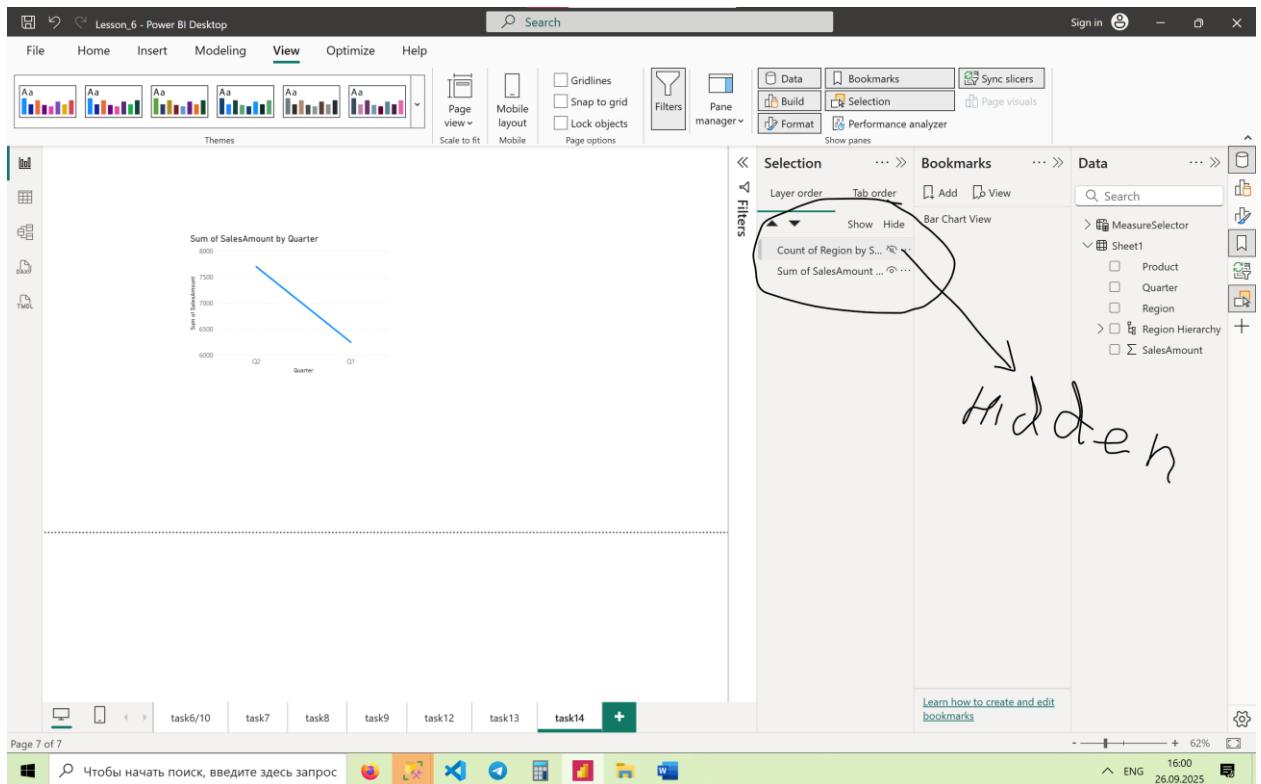
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15:58 26.09.2025

This screenshot shows the Power BI Desktop interface with the 'Data' pane open on the right. The 'Selected visuals' option is highlighted with a callout bubble.



And now we'll do these processes with the Line Chart:



Lesson_6 - Power BI Desktop

File Home Insert Modeling View Optimize Help

Themes Scale to fit Gridlines Snap to grid Lock objects

Page view Mobile layout Page options Filters

Page manager Data Bookmarks Sync slicers Selection Format Performance analyzer Show panes

Selection Layer order Tab order Add View Bar Chart View Bookmark 2

Show Hide Count of Region by S... Sum of SalesAmount ...

Update Rename Delete Group

Data Search MeasureSelector

Product Quarter Region

Region Hierarchy SalesAmount

Selected visuals

Sum of SalesAmount by Quarter

8000
7500
7000
6500
6000

Q2 Q1

Quarter

task6/10 task7 task8 task9 task12 task13 task14 +

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Page 7 of 7

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Windows Start Taskbar

ENGLISH 16:02 26.09.2025

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File Home Insert Modeling View Optimize Help

Themes Scale to fit Gridlines Snap to grid Lock objects

Page view Mobile layout Page options Filters

Page manager Data Bookmarks Sync slicers Selection Format Performance analyzer Show panes

Selection Layer order Tab order Add View Bar Chart View Line Chart View

Show Hide Count of Region by S... Sum of SalesAmount ...

Update Rename Delete Group

Data Search MeasureSelector

Product Quarter Region

Region Hierarchy SalesAmount

Selected visuals

Sum of SalesAmount by Quarter

8000
7500
7000
6500
6000

Q2 Q1

Quarter

task6/10 task7 task8 task9 task12 task13 task14 +

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Windows Start Taskbar

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File Home Insert Modeling View Optimize Help

New page New visual Visuals Key influencers Decomposition tree AI visuals Paginated report Power Apps Automate Power Platform

Pages

Sum of SalesAmount by Quarter

8000
7500
7000
6500
6000

Q2 Q1

Quarter

Sum of SalesAmount

Format

Filters

Page information

Canvas settings

Canvas background

Wallpaper

Filter pane

Filter cards

Navigator

Data

MeasureSelector

Sheet1

- Product
- Quarter
- Region

Region Hierarchy

- \sum SalesAmount

Learn how to create and edit bookmarks

task6/10 task7 task8 task9 task12 task13 task14 +

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62%

16:05 26.09.2025

The screenshot shows a Power BI Desktop interface with a line chart titled "Sum of SalesAmount by Quarter". The chart displays two data points: Q2 at approximately 7500 and Q1 at approximately 6000. The "Format" context menu is open, and the "Blank" option under the "Filters" section is highlighted with a red circle. The "Data" pane on the right shows the data model with measures like Product, Quarter, Region, and SalesAmount.

Lesson_6 - Power BI Desktop

File Home Insert Modeling View Optimize Help Format Data / Drill

New page New visual Visuals Key influencers Decomposition tree AI visuals Paginated report Power Apps Automate Power Platform

Pages

Sum of SalesAmount by Quarter

8000
7500
7000
6500
6000

Q2 Q1

Quarter

Sum of SalesAmount

Format button

Filters

Bookmarks

Add View

Bar Chart View

Line Chart View

Properties

Size and style

Title

Button style

Rotation

Action

On

Data

MeasureSelector

Sheet1

- Product
- Quarter
- Region

Region Hierarchy

- \sum SalesAmount

Learn how to create and edit bookmarks

task6/10 task7 task8 task9 task12 task13 task14 +

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16:06 26.09.2025

The screenshot shows the same Power BI Desktop interface as the first one, but with the "Action" option in the "Format button" context menu highlighted with a red circle. The "Data" pane on the right is identical to the first screenshot.

Lesson_6 - Power BI Desktop

File Home Insert Modeling View Optimize Help Format Data / Drill

Edit interactions Apply drill down filters to Entire page Bring forward Send backward Selection Align Group

Sum of SalesAmount by Quarter

8000
7500
7000
6500
6000

Quarter Q2 Q1

Filters

Bookmarks Add View

Format button Search

Data Search

Action Type Bookmark

Bookmark Back Bookmark Drill through Page navigation Q&A Web URL Apply all slicers Clear all slicers Group

Reset to default

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task6/10 task7 task8 task9 task12 task13 task14 +

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Sum of SalesAmount by Quarter

Quarter	Sum of SalesAmount
Q2	7500
Q1	6000

Lesson_6 - Power BI Desktop

File Home Insert Modeling View Optimize Help Format Data / Drill

Edit interactions Apply drill down filters to Entire page Bring forward Send backward Selection Align Group

Sum of SalesAmount by Quarter

8000
7500
7000
6500
6000

Quarter Q2 Q1

Filters

Bookmarks Add View

Format button Search

Data Search

Action Type Bookmark

Bookmark None Bar Chart View Line Chart View

Reset to default

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task6/10 task7 task8 task9 task12 task13 task14 +

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16:08 26.09.2025

Sum of SalesAmount by Quarter

Quarter	Sum of SalesAmount
Q2	7500
Q1	6000

Lesson_6 - Power BI Desktop

File Home Insert Modeling View Optimize Help Format Data / Drill

Edit interactions Apply drill down filters to Entire page Bring forward Send backward Selection Align Group

CTRL+click here to follow

Bookmark

Count of Region by SalesAmount

SalesAmount

Count of Region

Bookmarks

Add View

Bar Chart View Line Chart View

Format button

Search

Button Properties

Text On

Icon On

Fill Off

Border Off

Shadow Off

Glow Off

Reset to default

Rotation

Action On

Action

Tooltip On

Reset to default

Data

Search

MeasureSelector

Sheet1

Product

Quarter

Region

Region Hierarchy

SalesAmount

task6/10 task7 task8 task9 task12 task13 task14 +

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62%

Lesson_6 - Power BI Desktop

File Home Insert Modeling View Optimize Help

Paste Get data Excel OneLake SQL Server Data Catalog Recent sources

Clipboard Transform Refresh data New visual More box New visual calculations Sensitivity Publish Copilot

Bar

Line

Sum of SalesAmount by Quarter

Sum of SalesAmount

Quarter

Q2 Q1

Format

Search

Page information

Canvas settings

Canvas background

Wallpaper

Filter pane

Filter cards

Data

Search

MeasureSelector

Sheet1

Product

Quarter

Region

Region Hierarchy

SalesAmount

task6/10 task7 task8 task9 task12 task13 task14 +

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80%

80%

15. Optimize a slow-rendering report with 10+ visuals

- Reduce the number of visuals on the page.
- Use **aggregated tables** instead of raw data.

- Use **Performance Analyzer** (View → Performance Analyzer) to check bottlenecks.
- Remove unnecessary fields and filters.

