**Exercise: Creating an interactive report**

**Introduction**

Giving stakeholders the ability to dive into report data to explore summaries and insights is an essential role for a data analyst. As different stakeholders bring different viewpoints, an interactive report will enable various discoveries and help unlock key business decisions. In this exercise, you will learn how to use Power BI to enable user interactions in reports and encourage engagement with the data.

**Case study**

You are preparing a quarterly sales report for the CEO of Adventure Works. After analyzing the data, you identify some key insights into the **Mountain Bike** product category and how the products in this category peak at the end of the first quarter (Q1) in preparation for summer.

As a data analyst, you know it is your role to bring these insights to the CEO to enable effective decision-making. As part of the final preparations, to improve the user experience and highlight the key insight into mountain bike sales, you decide to do the following:

* Configure drillthrough to allow for data exploration.
* Allow for easy filtering of product categories using a slicer.
* Provide a convenient bookmark to reload the report with the key insight highlighted.

**Step 1: Create the Sales Detail page**

1. Download the *Creating an interactive report.pbix* file and open it in Power BI. The **Q1 Sales Summary** chart will be displayed.

[Create an interactive report](https://d3c33hcgiwev3.cloudfront.net/9W6qWdLmRKe42In4AiGROw_77a07591708c4be7b2a7db649adcc8e1_Create-an-interactive-report.pbix?Expires=1711324800&Signature=UwEVylUTTW5f6uu7AEaITR4bisfbeoNKabWNM541oWybwOfm0zaaMVTHrR6Y3zOu7-jHqQUT9zq8Pka8AE6Ow1r~XvlvbgpkTKL5lj9ntUot5dBXV~nBwob2sQ84i-0DypVJqKmd4SZkJ-4k1COnrA4uJFuW2dMDdC05Sfqm448_&Key-Pair-Id=APKAJLTNE6QMUY6HBC5A" \t "_blank)

[PBIX File](https://d3c33hcgiwev3.cloudfront.net/9W6qWdLmRKe42In4AiGROw_77a07591708c4be7b2a7db649adcc8e1_Create-an-interactive-report.pbix?Expires=1711324800&Signature=UwEVylUTTW5f6uu7AEaITR4bisfbeoNKabWNM541oWybwOfm0zaaMVTHrR6Y3zOu7-jHqQUT9zq8Pka8AE6Ow1r~XvlvbgpkTKL5lj9ntUot5dBXV~nBwob2sQ84i-0DypVJqKmd4SZkJ-4k1COnrA4uJFuW2dMDdC05Sfqm448_&Key-Pair-Id=APKAJLTNE6QMUY6HBC5A" \t "_blank)

1. Add a new report page and name it **Sales Detail**.
2. In the **Sales Detail** page, add a table visualization that displays the **Customer Location** and **Order Total**.
3. Note down the total revenue displayed in the **Summary** row at the bottom of the table.

**Step 2: Connect the order Month as the Drillthrough field**

1. Open the **Data** pane and expand the **Order Date** field.
2. In the **Data Hierarchy**, drag the **Month** field to the **Drillthrough** field in the **Visualizations** pane.

**Note:** Power BI automatically creates a **back arrow** button in the top-left corner of the report page. Holding the **control** key and selecting the **back arrow** button will navigate to the **Sales Summary** page.

**Step 3: Add a slicer for Product Category**

1. Open the **Sales Summary** page.
2. Add a slicer visualization and select **Product Category** as the filter field.

**Step 4: Add a bookmark for Mountain Bikes sold in March**

1. Select **Mountain Bikes** in the slicer to filter the data to only sales in the **Mountain Bike** product category.
2. **Right-click** the **March** column, select **Drill-through**, and then **Sales Detail**.
3. Now that the report is in a filtered state, add a new bookmark and name it **March Mountain Bikes Revenue.**
4. Select the bookmark and note down the total sales revenue on the **Sales Detail** page.

**Conclusion**

In this exercise, you increased the interactivity of a report and improved the user experience. As you build reports for different audiences, you can utilize these features to deliver valuable insights to stakeholders using the organization’s data.