

[Company name]

Visualizing

[Document subtitle]

Steven Renders

[Date]

Table of Contents

Step 03 Visualizing.....	2
Add a Title.....	2
Add Slicers	2
Add a Chart.....	6
Add a Table.....	9
Add a TreeMap.....	11
Add Cards:	13
Add a Donut Chart.....	15
Rearrange report items	17
Create Phone Layout	17
Save Power BI Desktop file.....	18

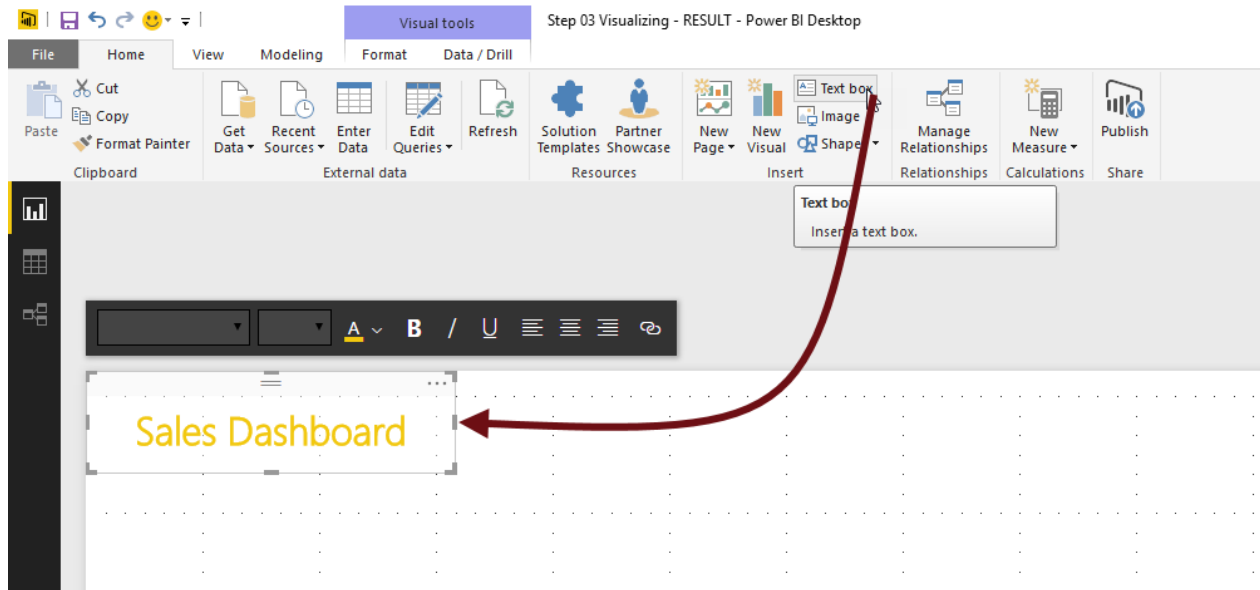
Step 03 Visualizing

You can continue to work on your previous Power BI Desktop file, or you can start with this file: [Step 02 Step 03 Visualizing - START.pbix](#)

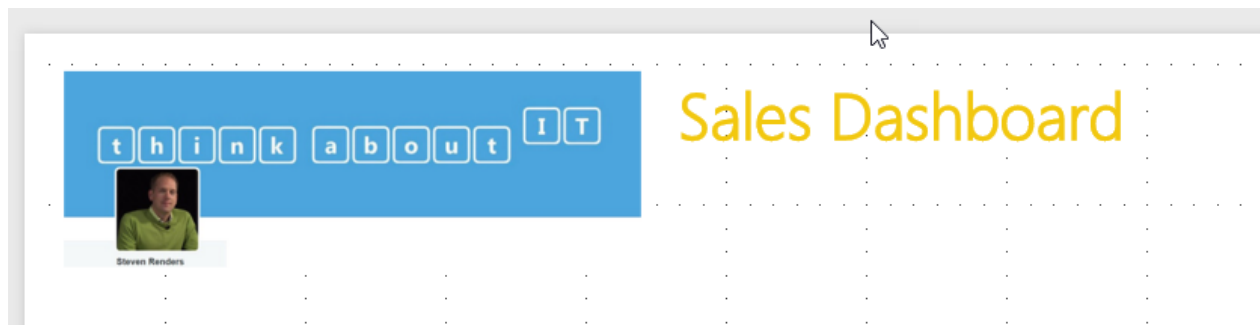
Now that we have a Power BI Desktop file with a good data model, you are ready to create some reports and bring the information to life.

Add a Title

Start by adding a title for the dashboard.

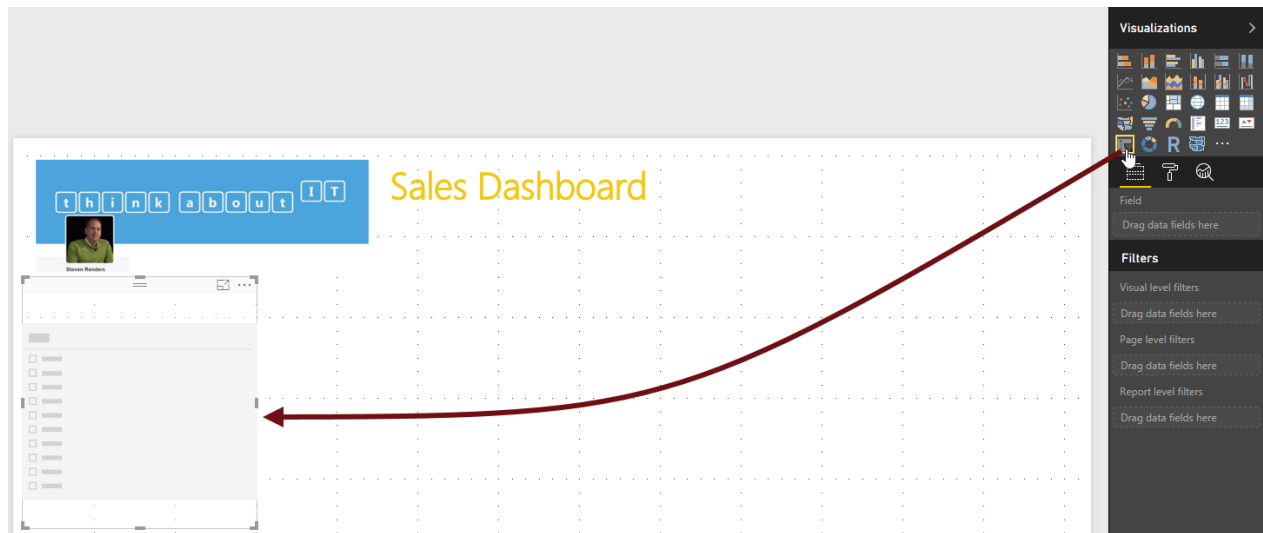


From the ribbon, select a textbox and use the formatting buttons to format the text. You can also include a logo if you want:

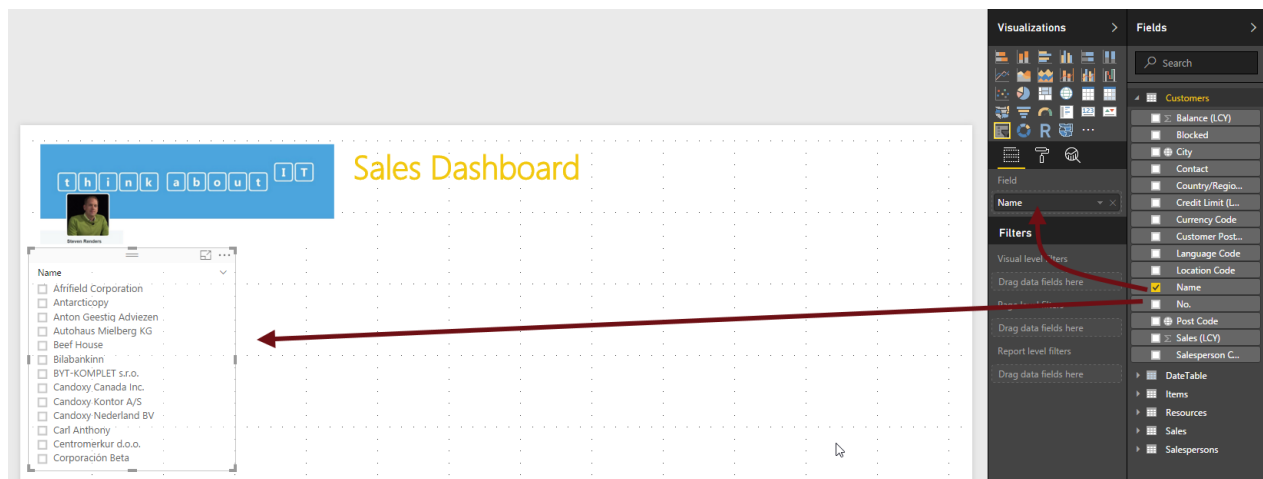


Add Slicers

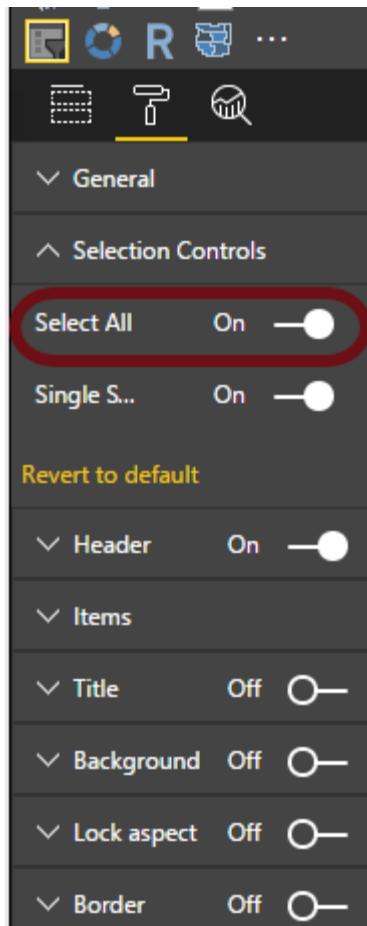
To filter the result, you can add some Slicers to the report. In the Visualizations, select Slicer, and drag in onto the report:



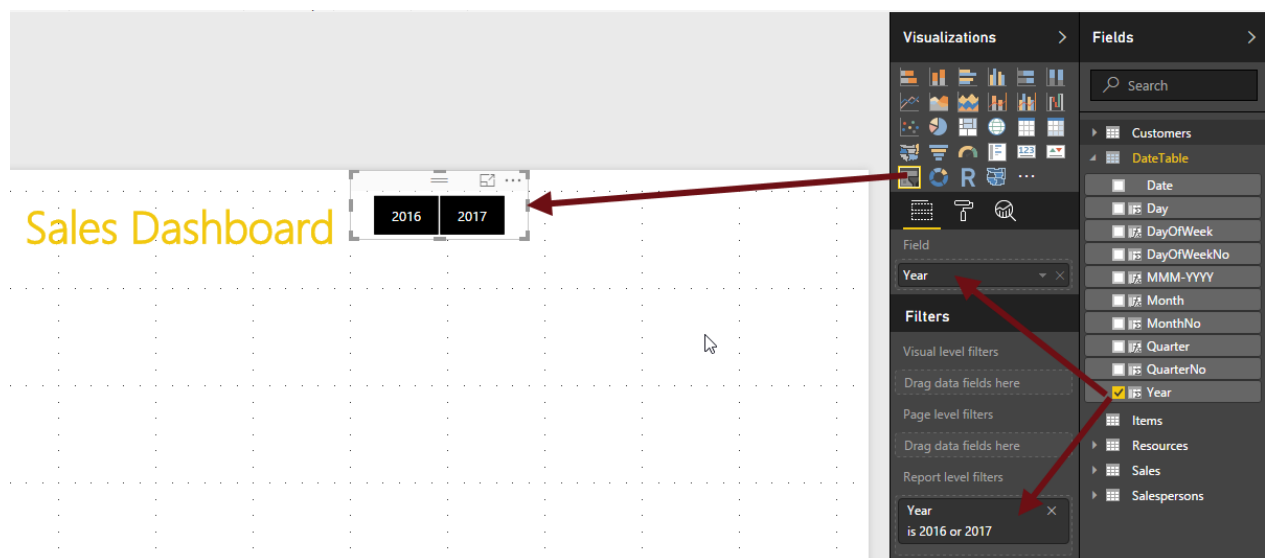
Then add the Customer Name to the Slicer:



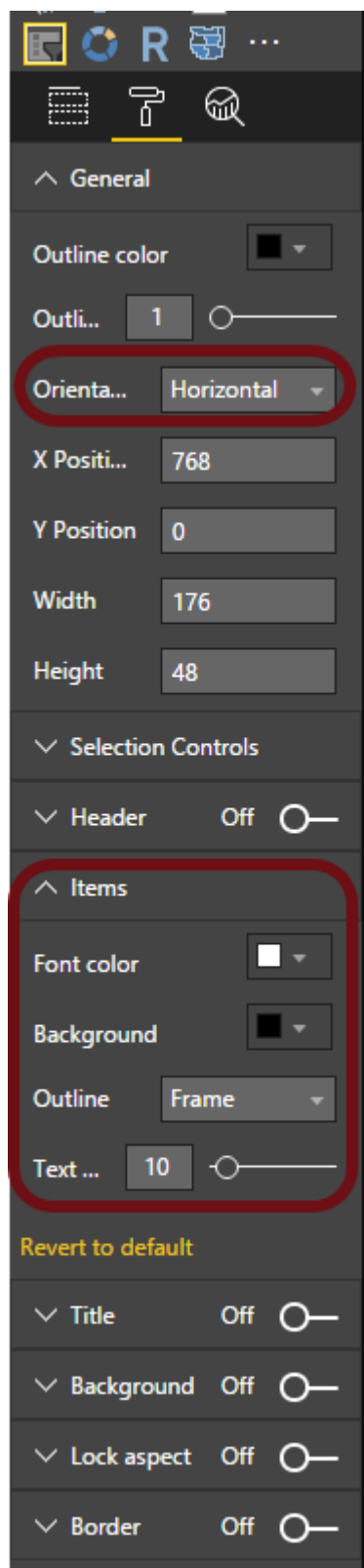
Next, enable Select All, using the Paint Brush:



Now we'll add another Slicer, for the Year:



In the report level filters, filter on 2016 and 2017. Then, using the brush options:



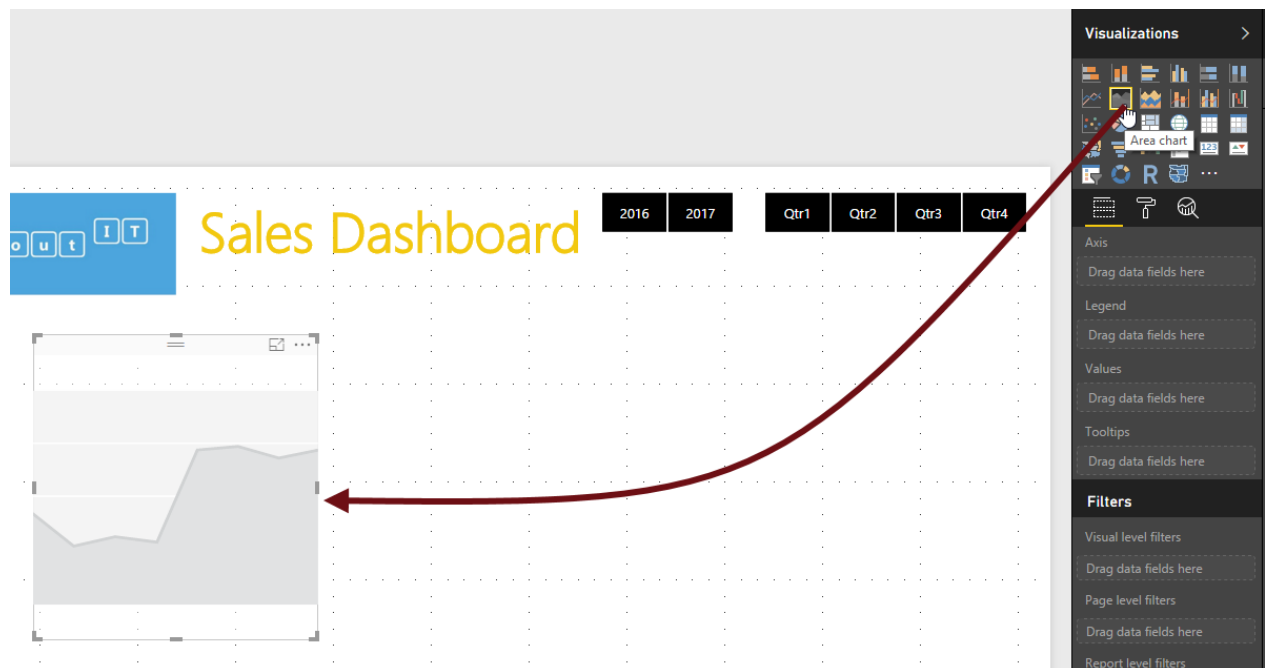
Change the orientation to horizontal, and set the colors for the Items, until the years resemble black squares, as in the above image.

Now repeat the same steps to add a Quarter slicer:

The screenshot shows the Power BI Desktop interface. On the left, a report is displayed with a slicer at the top containing four buttons labeled 'Qtr1', 'Qtr2', 'Qtr3', and 'Qtr4'. Below the slicer is a large area with a dotted grid. On the right, the 'Visualizations' pane is open, showing various chart types. The 'Fields' pane is also open, displaying a search bar and a list of data fields. The 'Date' table is expanded, showing fields like 'Date', 'Day', 'DayOfWeek', 'DayOfWeekNo', 'MMM-YYYY', 'Month', 'MonthNo', 'Quarter' (which is checked), 'QuarterNo', and 'Year'. The 'Filters' pane is open, showing 'Visual level filters' with a 'Quarter' field selected, 'Page level filters' with a 'Year' field selected, and 'Report level filters' with a filter 'Year is 2016 or 2017' applied.

Add a Chart

Next add an Area Chart to the report:



In the area chart set the following properties:

Visualizations

Axis

- Date
- Year
- Quarter
- Month
- Day

Legend

Drag data fields here

Values

- Cumulative Sales (Selected)
- Cumulative Sales LY
- Cumulative Sales 2 Years Prior

Tooltips

Drag data fields here

Filters

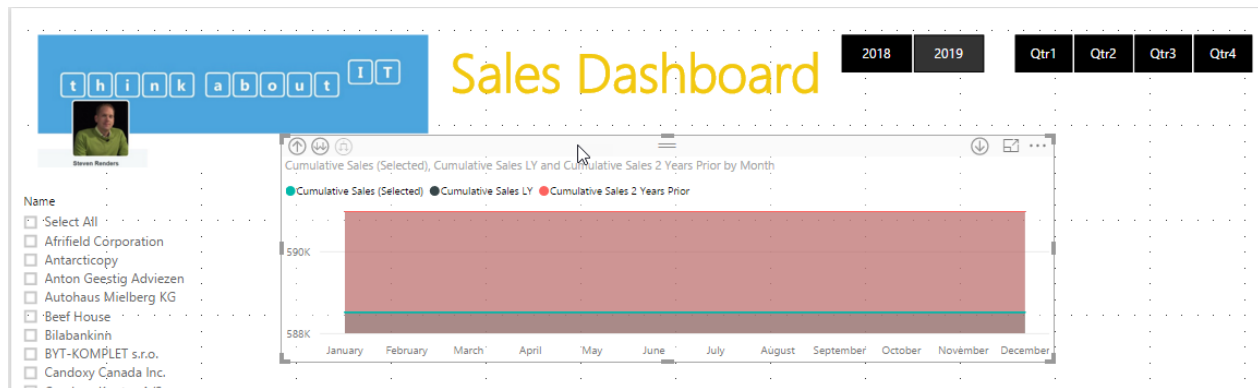
Visual level filters

- Cumulative Sales (Selected)(All)

Fields

Search

- Customers
- DateTable**
 - ☒ Date
 - ☐ Day
 - ☐ DayOfWeek
 - ☐ DayOfWeekNo
 - ☐ MMM-YYYY
 - ☐ Month
 - ☐ MonthNo
 - ☐ Quarter
 - ☐ QuarterNo
 - ☐ Year
- Items
- Resources
- Sales**
 - ☐ % of TotalAmo...
 - ☐ % of TotalQua...
 - ☐ Amount
 - ☐ Amount Includ...
 - ☐ Bill-to Custom...
 - ☒ Cumulative Sal...
 - ☒ Cumulative Sal...
 - ☒ Cumulative Sal...
 - ☐ Currency Code
 - ☐ Cust. Ledger E...
 - ☐ Document No.



Add a Table

Next add a Table to the report, below the chart:

Visualizations

Visualizations icons: Bar, Line, Pie, Map, etc.

Values

- Country/Region Code
- City
- SumOfAmount

Filters

Visual level filters

- City(All)
- Country/Region Code(All)
- SumOfAmount(All)

Page level filters

Drag data fields here

Report level filters

Year

is 2019 or 2018

Filter Type

Basic filtering

Year	Count
Select All	
2019	365
2018	365
2017	365
2016	366
2015	365
2014	365
2013	365
2012	366
2011	365

Fields

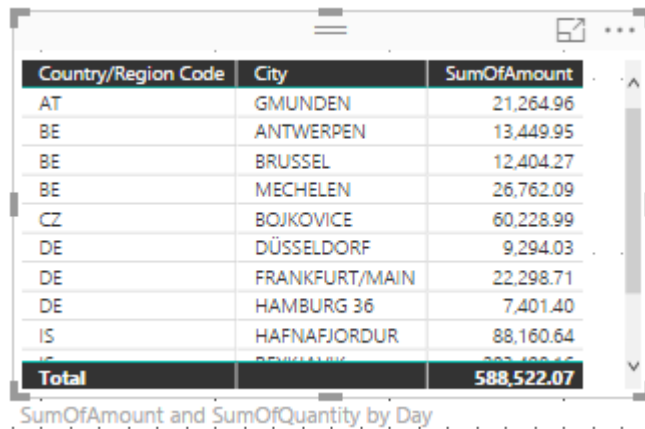
Search

Customers

- Balance (LCY)
- Blocked
- City
- Contact
- Country/Region...
- Credit Limit (L...
- Currency Code
- Customer Post...
- Language Code
- Location Code
- Name
- No.
- Post Code
- Sales (LCY)
- Salesperson C...

Sales

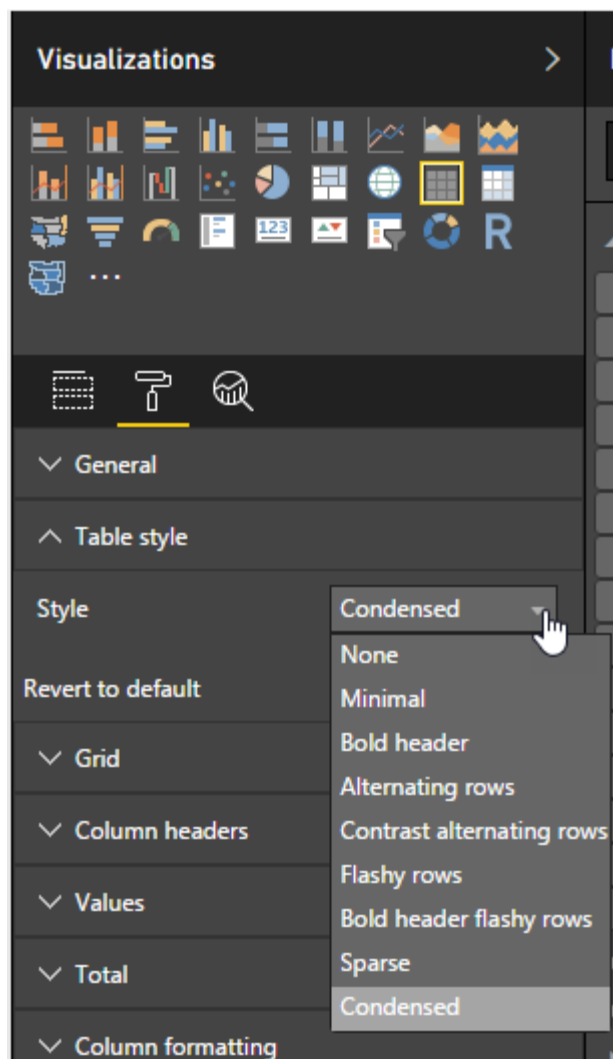
- % of TotalAmo...
- % of TotalQua...
- Amount
- Amount Includ...
- Bill-to Custom...
- Cumulative Sal...
- Cumulative Sal...
- Cumulative Sal...
- Currency Code
- Cust. Ledger E...
- Document No.
- Due Date
- ItemNo
- Last Sale Amo...
- Last Sales Date
- Line No.
- Location Code
- No
- Payment Term...
- Posting Date
- Posting Group
- Quantity



Country/Region Code	City	SumOfAmount
AT	GMUNDEN	21,264.96
BE	ANTWERPEN	13,449.95
BE	BRUSSEL	12,404.27
BE	MECHELEN	26,762.09
CZ	BOJKOVICE	60,228.99
DE	DÜSSELDORF	9,294.03
DE	FRANKFURT/MAIN	22,298.71
DE	HAMBURG 36	7,401.40
IS	HAFNAFJORDUR	88,160.64
IS	REYKJAVIK	293,499.65
Total		588,522.07

SumOfAmount and SumOfQuantity by Day

Then set the table style to condensed:



Add a TreeMap

Now add a TreeMap to the report:

Visualizations

Icons for various visualization types: Bar, Line, Pie, Treemap, etc. The **Treemap** icon is highlighted with a red arrow.

Fields

Search bar

Items

- Base Unit of M...
- Blocked
- Description
- Inventory
- ☒ ItemDescription
- Manufacturing...
- No.
- Unit Cost
- Unit Price
- Vendor Item No.
- Vendor No.

Resources

Sales

- % of TotalAmo...
- % of TotalQua...
- Amount
- Amount Includ...
- Bill-to Custom...
- Cumulative Sal...
- Cumulative Sal...
- Cumulative Sal...
- Currency Code
- Cust. Ledger E...
- Document No.
- Due Date
- ☒ ItemNo
- Last Sale Amo...
- Last Sales Date
- Line No.
- Location Code
- No
- Payment Term...
- Posting Date
- Posting Group
- Quantity
- ResourceNo
- Sales 2 Yrs Prior
- Sales LY
- Shipment Date
- ☒ SumOfAmount
- SumOfQuantity
- Total Transacti...

Group

ItemDescription

Details

Drag data fields here

Values

SumOfAmount

Color saturation

Drag data fields here

Tooltips

Drag data fields here

Filters

Visual level filters

- ItemDescription(All)
- SumOfAmount(All)

Page level filters

Drag data fields here

Report level filters

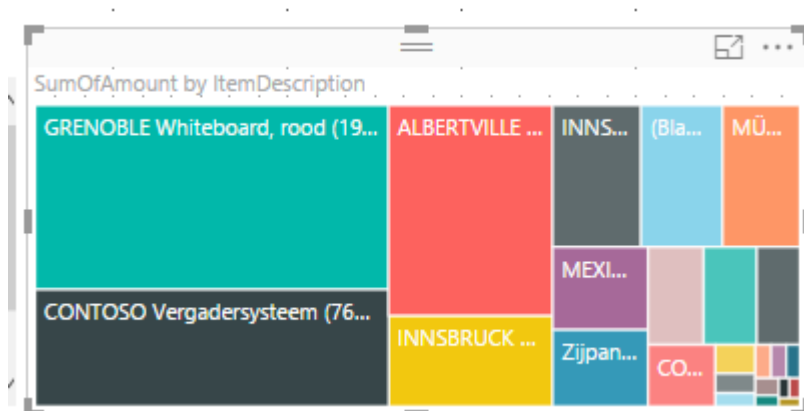
Year

is 2019 or 2018

Filter Type

Basic filtering

Year	Count
Select All	
<input checked="" type="checkbox"/> 2019	365
<input checked="" type="checkbox"/> 2018	365
<input type="checkbox"/> 2017	365
<input type="checkbox"/> 2016	366
<input type="checkbox"/> 2015	365
<input type="checkbox"/> 2014	365
<input type="checkbox"/> 2013	365
<input type="checkbox"/> 2012	366
<input type="checkbox"/> 2011	365



Add Cards:

Now add a Card to the report:

The screenshot displays a BI tool interface with a KPI card and a sidebar for visualizations and fields.

KPI Card: Shows a value of 590.99K for TotalAmount, with tabs for Qtr1, Qtr2, Qtr3, and Qtr4.

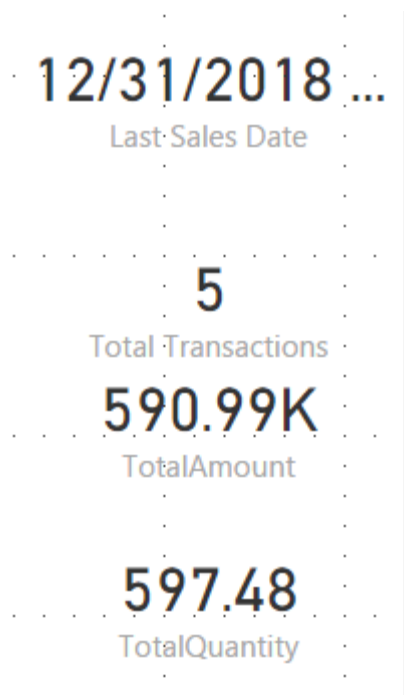
Visualizations Pane: Contains various chart and table icons. The 'Fields' section shows 'TotalAmount' selected.

Fields Pane: Lists available fields. A red arrow points from 'TotalAmount' in the Fields list to the 'TotalAmount' filter in the Filters pane.

Filters Pane: Shows 'TotalAmount' as a filter. Below it, a 'Year' filter is expanded, showing a list of years from 2011 to 2019 with corresponding counts.

Year	Count
2019	365
2018	365
2017	365
2016	366
2015	365
2014	365
2013	365
2012	366
2011	365

Repeat this for other KPI's:



[Add a Donut Chart](#)

Now add a Donut Chart to the report, for the total transactions per Salesperson:

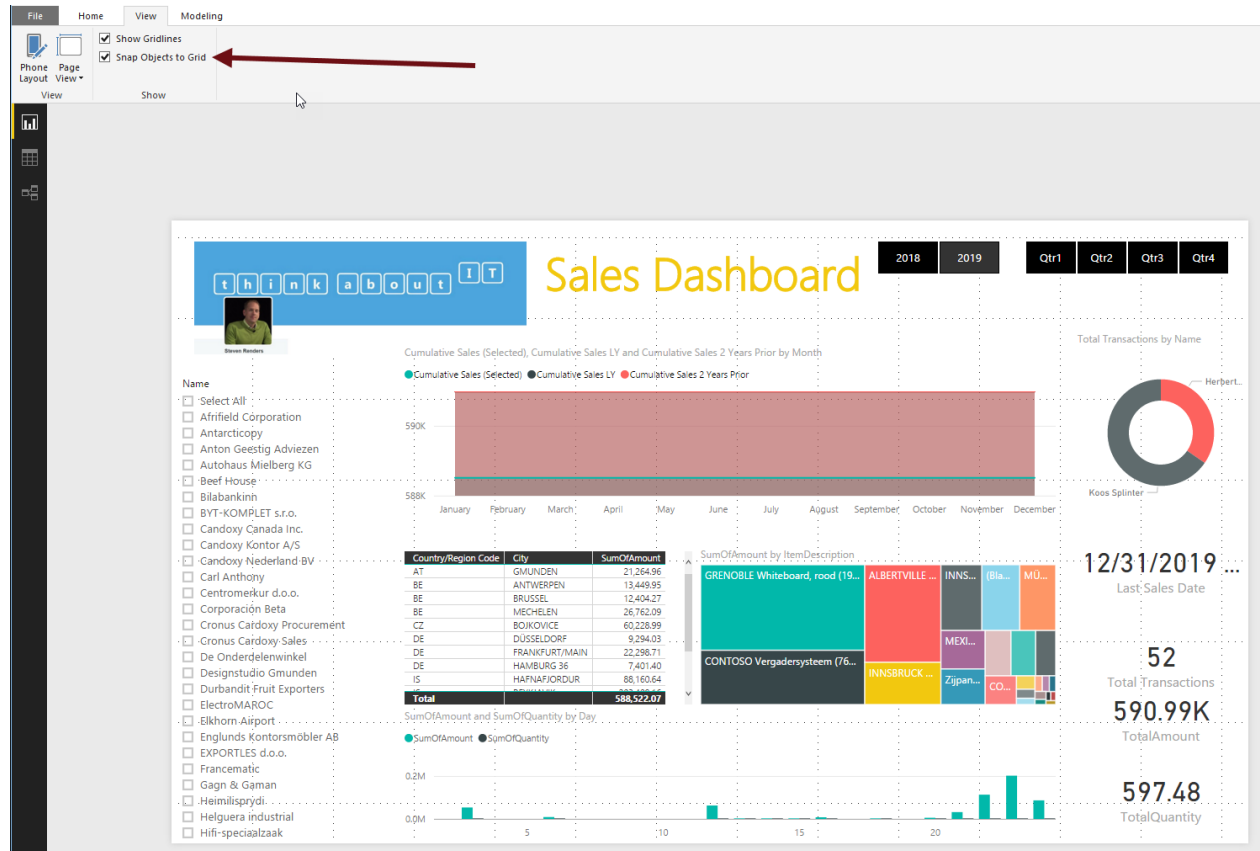
The screenshot displays a data visualization tool interface. On the left, a summary card titled "Total Transactions by Name" features a donut chart and a table of key metrics. The donut chart is divided into two segments: a large grey one and a smaller red one. The table below the chart lists the following metrics:

Metric	Value
Last Sales Date	12/31/2019 ...
Total Transactions	52
Total Amount	590.99K
Total Quantity	597.48

On the right, the "Visualizations" and "Fields" panels are visible. The "Visualizations" panel shows a grid of chart types, with a "Donut chart" icon highlighted by a red arrow. The "Fields" panel lists various data fields, with "Total Transactions" and "Name" highlighted by red arrows. The "Filters" panel shows a list of filters, including "Year" and "Filter Type", with "Basic filtering" selected. The "Fields" panel also shows a list of fields, including "Sales" and "Salespersons", with "Total Transactions" and "Name" highlighted by red arrows.

Rearrange report items

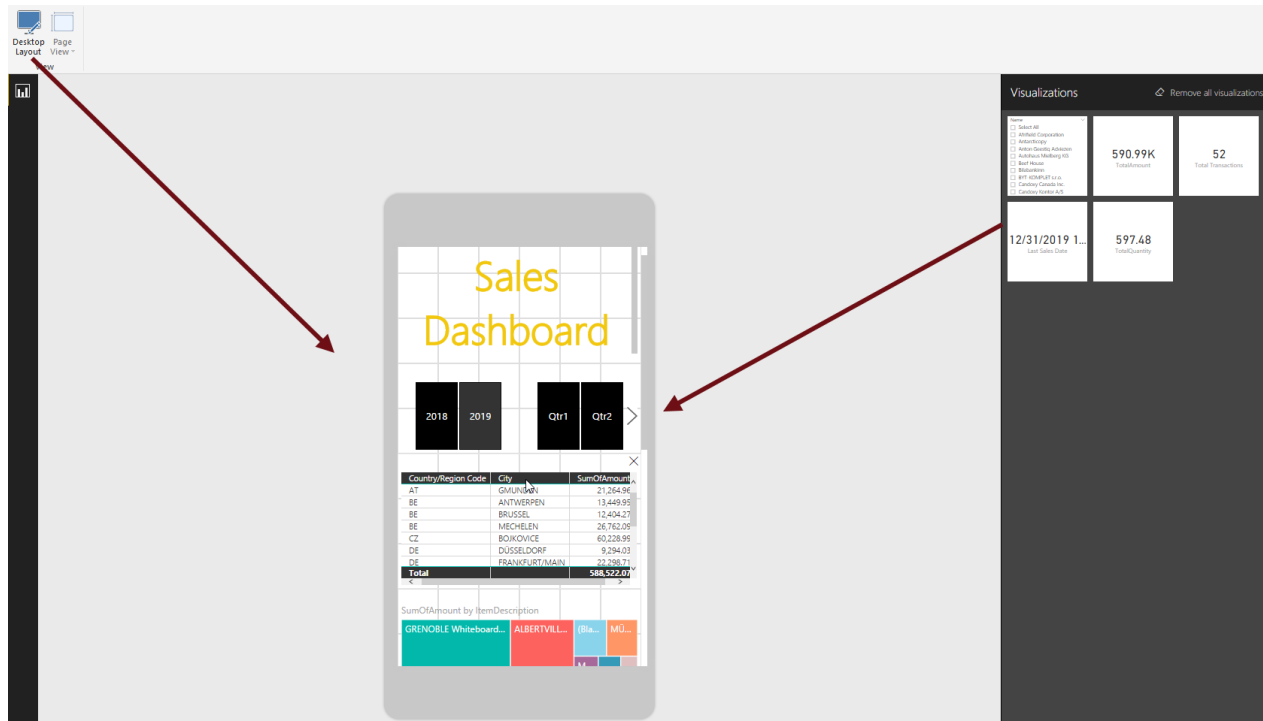
In the View tab in the ribbon, select Show Gridlines and Snap Objects to Grid:



Create Phone Layout

Select the Phone Layout in the ribbon. Then drag and drop report items to the layout:

VISUALIZING



Save Power BI Desktop file

Save your .pbix file.

