

Power BI

Paginated Reports

in a Day

Lab 06A - January 2021 release

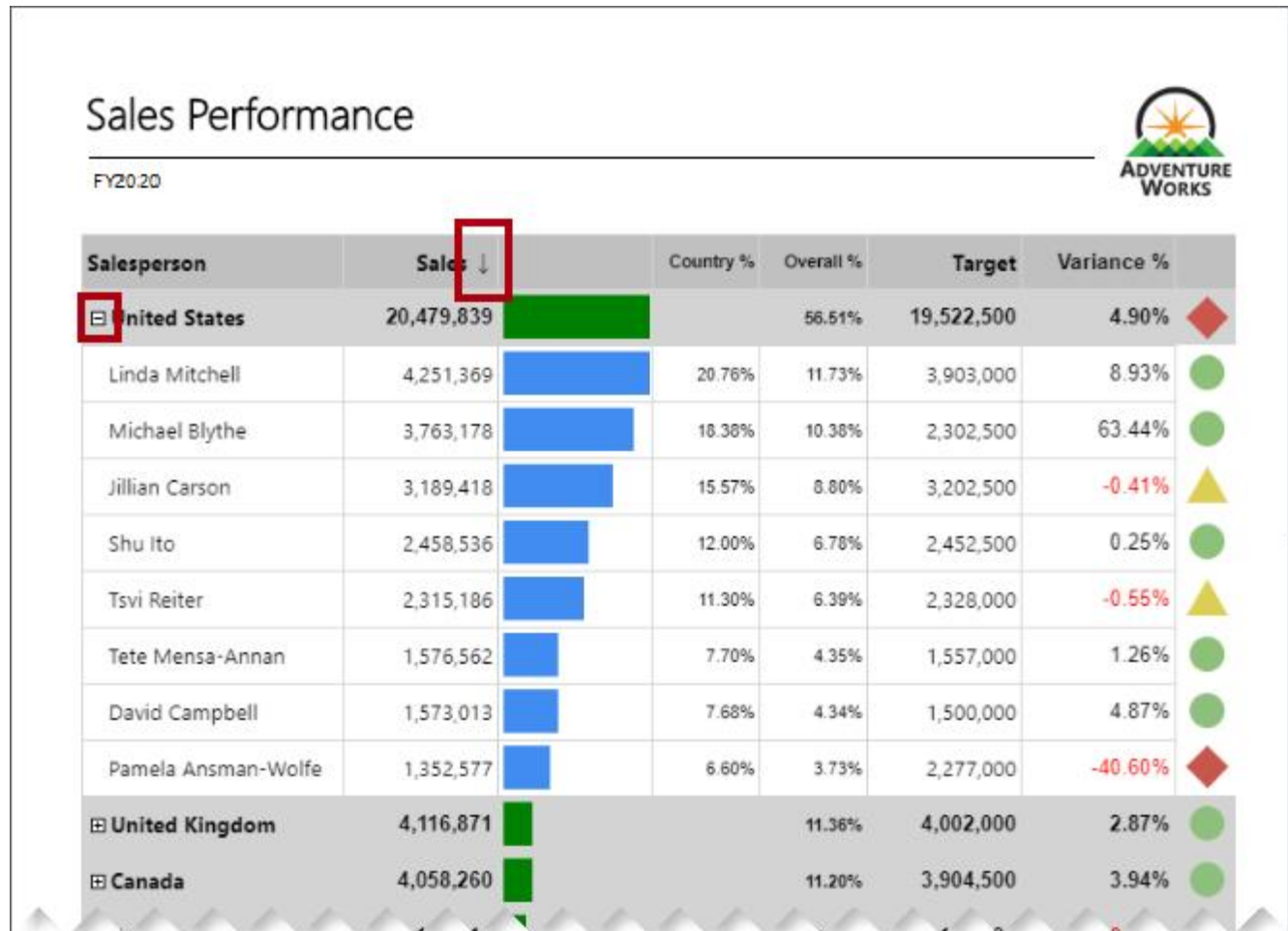
Add Interactivity Features

Overview

The estimated time to complete this lab is 10 minutes.

In this lab, you will enhance the design of the **Sales Performance** report with drilldown capabilities, and interactive sorting.

The final report will look like the following:



Exercise 1: Add interactivity features

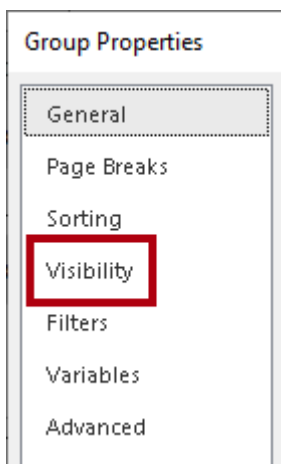
In this exercise, you will enhance the design of the **Sales Performance** report with drilldown capabilities, and interactive sort.

Important: There are many repetitive tasks when developing reports. The labs in this course will progressively reduce the detailed step-by-step instructions when detailed steps have already been provided.

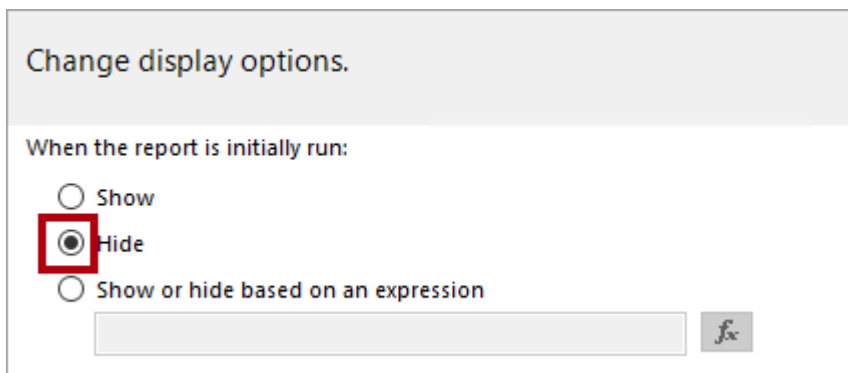
Task 1: Configure drilldown

In this task, you will configure visibility to achieve a drilldown effect.

1. In Power BI Report Builder, for the **Sales Performance** report, switch to the report designer.
2. To hide the detail group, in the **Grouping** pane (located beneath the report canvas), right-click the **(Details)** group, and then select **Group Properties**.
3. In the **Group Properties** window, select the **Visibility** page.

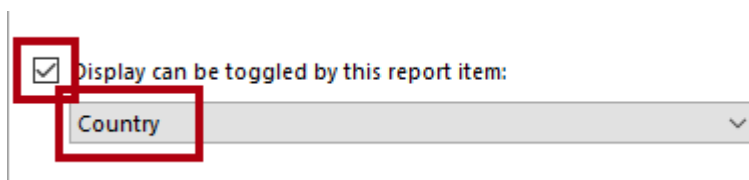


4. Select the **Hide** option.



5. Check the **Display Can Be Toggled by This Report Item** checkbox, and then select **Country** in the dropdown list.

Country is the name of the text box at [A2].



6. Click **OK**.
7. Preview the report, and then notice that the salespeople rows are no longer visible.
8. Expand **United States**, and then notice all the salespeople rows.

You must turn off print layout view to interact with the report.

Salesperson	Sales	Country %	Overall %	Target	Variance %	
⊕ Australia	1,421,811		3.92%	1,126,500	26.21%	●
⊕ Canada	4,058,260		11.20%	3,904,500	3.94%	●
⊕ Corporate HQ	1,251,447		3.45%	670,500	86.64%	●
⊕ France	3,121,616		8.61%	3,151,500	-0.95%	▲
⊕ Germany	1,790,640		4.94%	2,176,500	-17.73%	◆
⊕ United Kingdom	4,116,871		11.36%	4,002,000	2.87%	●
⊕ United States	20,479,839		56.51%	19,522,500	4.90%	◆
Total	36,240,485			34,554,000	4.88%	◆

9. Collapse **United States**.

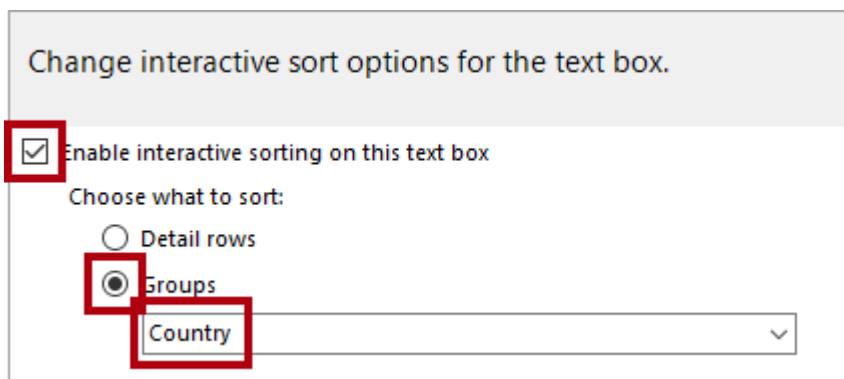
Task 2: Configure interactive sorting

In this task, you will configure interactive sorting to allow report users to sort countries by their sales amount.

1. Switch to the report designer.
2. Open the **Text Box Properties** window for the **Sales** table header text box [B1].
3. Select the **Interactive Sorting** page.



4. Check the **Enable Interactive Sorting On This Text Box** checkbox.
5. Select the **Groups** option, and then select **Country** in the dropdown list.



6. In the **Sort By** dropdown list, select **[Sales]**.
7. Click the **FX** button to modify the expression as follows:

VB.NET

```
=Sum(Fields!Sales.Value)
```

This expression sums the sales values, at group level. The group must sort by the sum of sales.

8. Click **OK**.
9. Preview the report, and then notice the icon in at the right of the **Sales** header text.

Salesperson	Sales	Country %	Overall %	Target	Variance %	
⊕ Australia	1,421,811		3.92%	1,126,500	26.21%	●
⊕ Canada	4,058,260		11.20%	3,904,500	3.94%	●

10. Click the icon to sort the countries in ascending sales order.
11. Click the icon again, to sort the countries in descending sales order.
12. Save the report.
*The development of the **Sales Performance** report is now complete.*
13. Publish the report to your workspace, then view and interact with the report in the Power BI service.

Summary

In this lab, you enhanced the design of the **Sales Performance** report with drilldown capabilities, and interactive sorting.

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