WORKSHOP EPITECH MICROSOFT POWER BI

Now we will discuss about **key features of Power Bi dashboard**. These are:

- With the Power Bi dashboard, you can work with several datasets such as excel, SharePoint online, SQL server, etc.
- It contains one or more datasets visualizations per dashboard.
- Power BI dashboard allows us to add, remove or customize visuals according to our business requirements.
- In the Power Bi dashboard, we can instantly share a dashboard with other users having the same domain email or your office colleague.

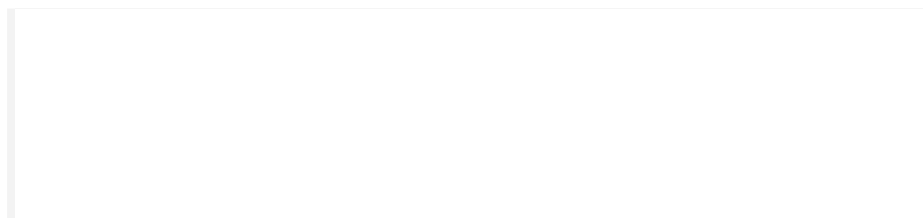# How to create a Power Bi dashboard from an excel report?

Step-1:

I hope by this time, you have already installed the Power BI

Install Microsoft Power BI Desktop from the link above : https://powerbi.microsoft.com/en-us/desktop/ or on the Microsoft store

Let us create our first Power BI dashboard using excel data.

	A	B	C	D	E	F	G
1	Product Name	Price	Quantity	Customer Name	Customer Location	Units Delivered	Sales Person Name
2	Laptop	40000	9	TSinfo	Banglore	5	Binaya
3	Desktop	25000	7	HCL	Hyderabad	7	Ramakanta
4	SmartPhone	15000	15	TSinfo	Banglore	12	Roshni
5	Laptop Charger	3000	12	HCL	Hyderabad	8	Binaya
6	Mobile cover	200	20	WeWork	Kolkata	13	Sweta
7	Mouse	1500	15	AllState	Noida	9	Priya
8	Keyboard	2000	17	Digigroup	Odisha	15	Sweta
9	Headphone	1800	20	TSinfo	Banglore	20	Binaya
10	Mobile charger	600	10	HCL	Hyderabad	8	Ramakanta
11	Laptop Charger	2500	12	Dell	Mumbai	3	Roshni
12	Headphone	2200	15	Digigroup	Odisha	15	Roshni
13	Mouse	1800	13	TSinfo	Banglore	10	Roshni

Here, we can using the excel file on github to do this workshop
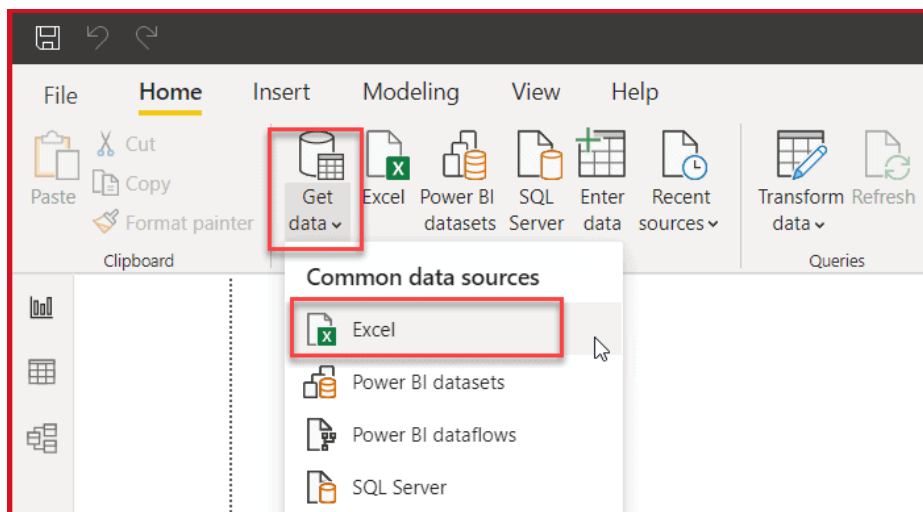
Step-2:

To create visualizations using the above excel data, we need to upload the file into Power BI desktop.

Open Power Bi desktop, from the Home tab, click on **Get data** -> **Excel**. You can also directly select the excel file, from the **Excel** button in the Ribbon.

If you do not see the Excel option, then go to **Get data** -> **More…** Then from the Get Data dialog box, Click **File** -> **Excel**. Then select the excel file from the local system.
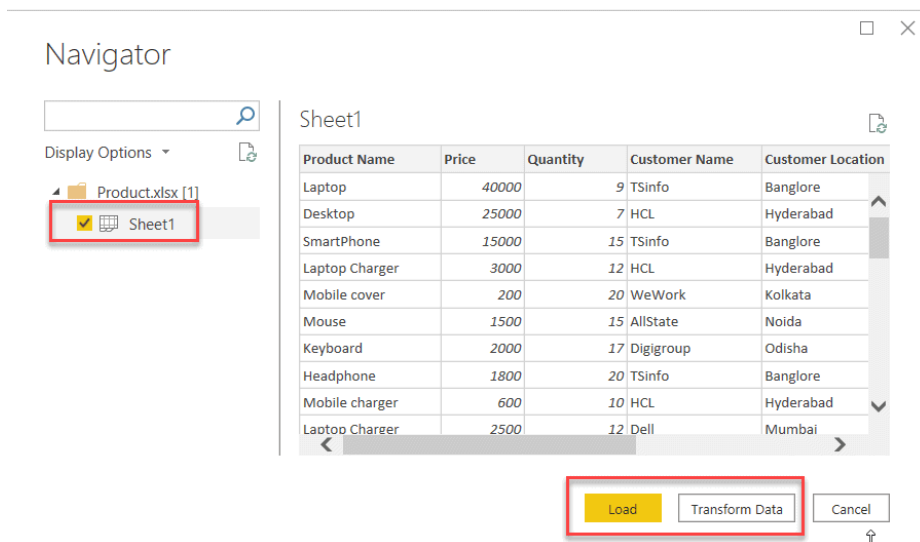
how to create a dashboard in power bi

Step-3:

Then it will load the excel in the **Navigator dialog box**. Here It will show you all the sheets presented in the excel file, and we need to check the required Sheets, that we want to use in the dashboard.

Below you can see, I have selected Sheet1. Then click on **Load** or **Transform Data**.
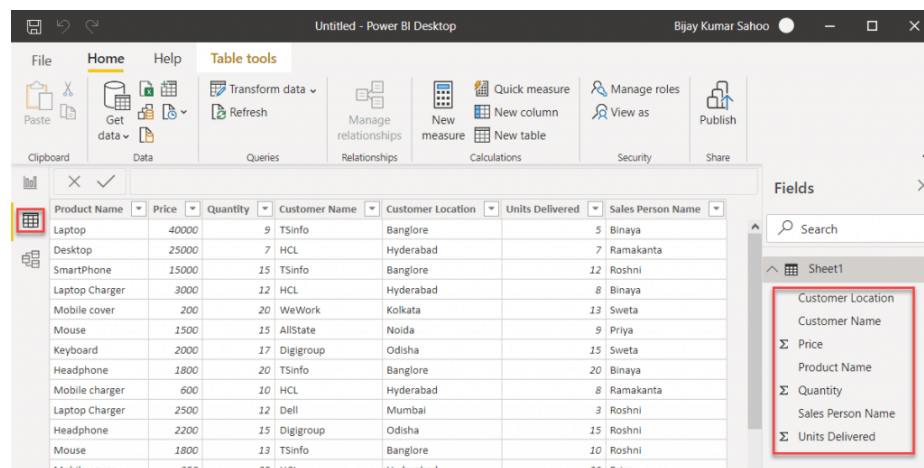
When we click on the **Load**, it will load the actual data without any changes. When we click on the **Transform Data**, it will redirect to the **query editor page**, where we can format the data as well. Here we click on **Load** (it will take a little time to load).

Power BI create dashboard

Step-4:

Now, click on the **Table** icon on the page, here you can see all the excel data, as well as the **fields** in the Fields section (right side)

Create a dashboard in Microsoft Power BI

Step 5:

To display the **Total amount** on the Power BI dashboard, we need to create a column to the data table.

Here click on the **New column** and add the below formula in

the **Formula bar** like below, Once you save the formula, you can see the **Total Amount** columns have been added and the values have been populated.

```
Total Amount = Products[Price]*Products[Quantity]
```
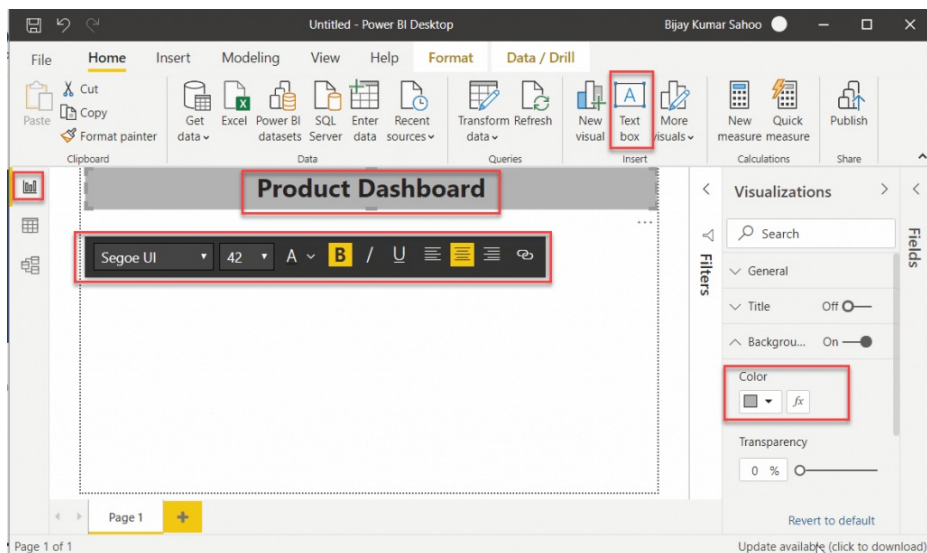

Power BI create new column

Step-6:

Now, we need to create a report. For this, click on the Report icon (left side) which will open the Report page.

Add a Heading

To add a heading to the report page, go to **Home** -> **Text box**. In the Textbox, we can change the font, color, background color, etc. like below:
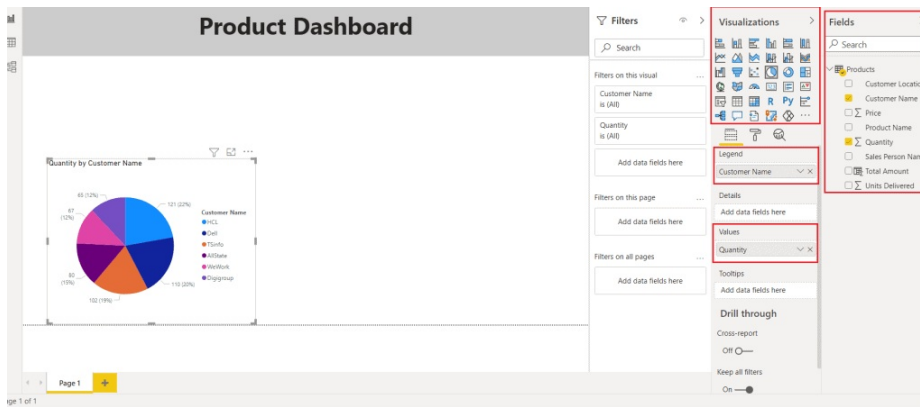
create power bi dashboard from excel sheet

Step-7:

Now, we can add our first visualization. Choose visuals from **visualizations**. There are different type of prebuild templates or visuals are available in Microsoft Power Bi.

For example, here we will create a visual that shows **the product quantity by customer name**. For this particular visual we would select the **Donut Chart** or **Pie chart**.

Select **Pie chart** from **visualizations**. Expand the size for better visualization. Then add data fields **Customer Name** and **Quantity** in **Legend** and **Values** respectively (You can add data fields by using drag-drop). Then it will be shown as below:
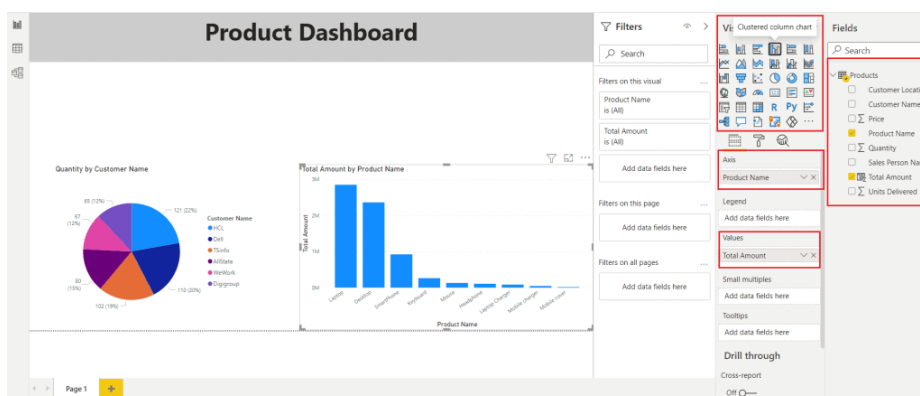
create power bi dashboard from excel spread sheet

Step-8:

Similarly, we will create another visual to show the **total amount by per product**. For example, we would select here, **clustered column chart**.

- **Axis** – Product Name (Drag Product name from Fields and put it in Axis)
- **Values** – Total Amount (Drag Total Amount from Fields and put it in Axis)

Then the chart will be formed as below:
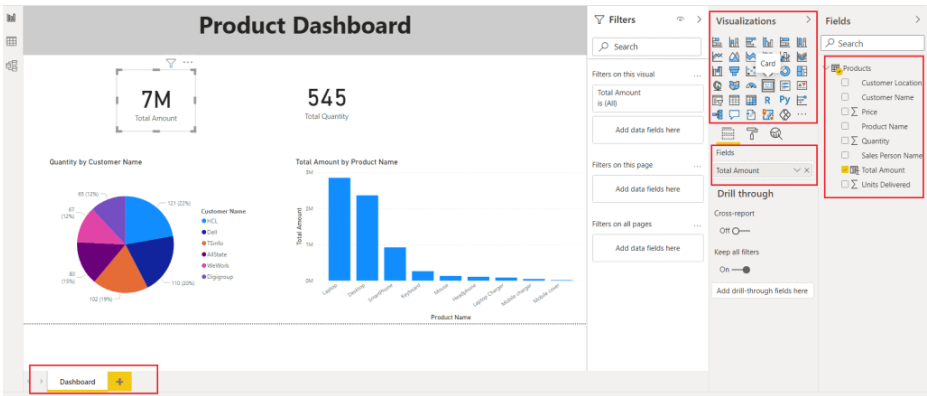

build power bi dashboard from excel

Step–9:

Also, we can visualize the **total amount** or total **product**

quantity by using a **card** visual.

Select **card** from visualizations. Then drag-drop the **total amount** data field in the field section. Similarly, you can do it by using and applying the **total quantity** on another card template.

Now the dashboard will appear like below:

How do you make a power BI dashboard

This is how to **create power bi dashboard from excel sheet**.