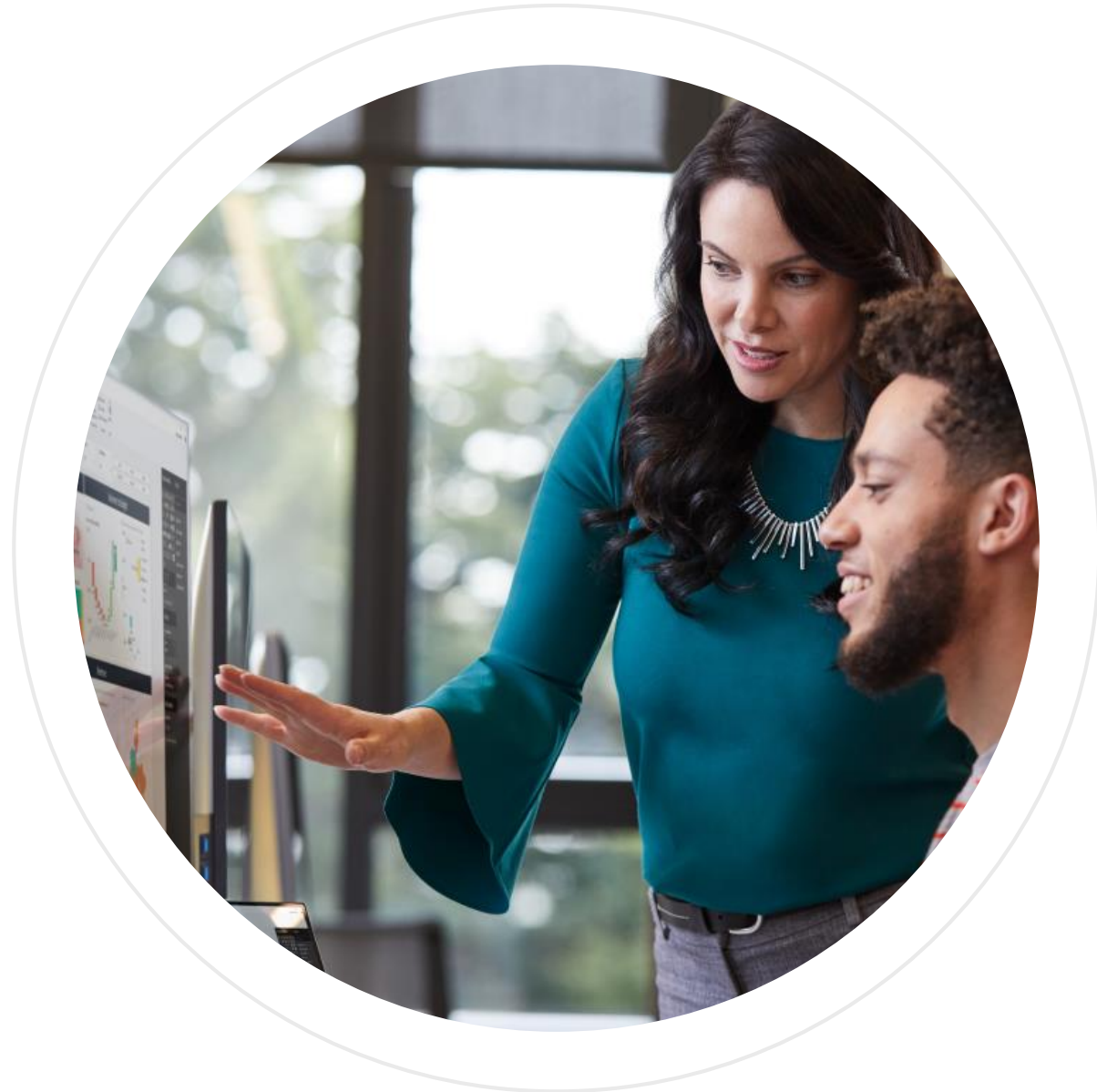


# Module 7: Create Reports

Mohammed Arif



# Learning Objectives

**You will learn the following concepts:**

- Design a Report
- Enhance a Report

# Module Agenda



Design a Report



Enhance the Report

# Lesson 1: Design a Report



# Introduction

- Visuals allow you to share data insights more effectively.
- Effective visualizations help your users connect and interact with the information.

**\$184.46M**  
Net Sales

**€13.50M**  
Cost of Sales

**€30.54M**  
YTD

Sort of Sales  
☐ Online  
☐ Retail

**\$170.96M**  
Gross Sales

**\$49.01K**  
Gross Sales MTD

**Top 10 Products**

Product Name	Gross Sales
Long-Sleeve Logo Jersey, L	\$329,534.08
Classic Vest, S	\$269,684.50
Sport-100 Helmet, Blue	\$235,937.57
Sport-100 Helmet, Black	\$228,554.68
Sport-100 Helmet, Red	\$219,247.34
Short-Sleeve Classic Jersey, XL	\$206,617.36
Long-Sleeve Logo Jersey, M	\$181,763.64
AWC Logo Cap	\$74,715.89
Water Bottle - 30 oz.	\$34,006.65
Patch Kit/8 Patches	\$8,850.85
<b>Total</b>	<b>\$1,790,912.76</b>

**Top 10 Customer**

**Gross Sales by Year by Month**

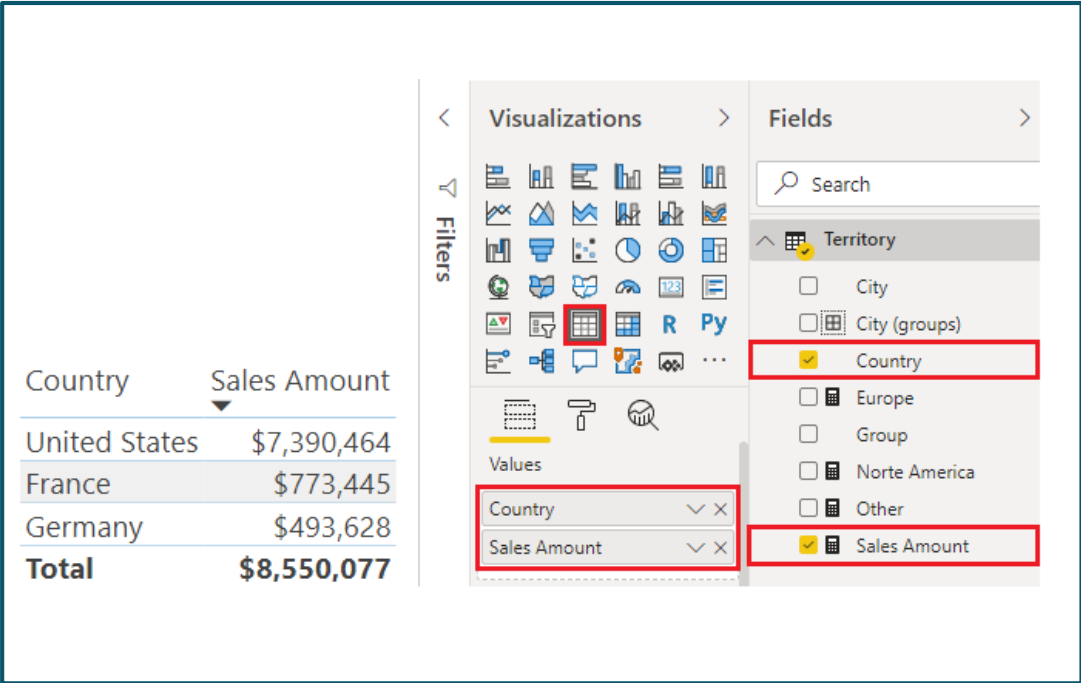
**Net Sales by Country**

☐ 2011  
☐ 2012  
☐ 2013  
☐ 2014

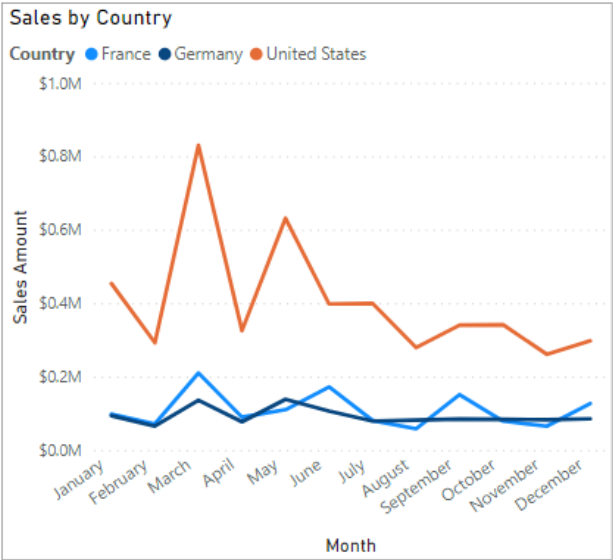
☐ Q1  
☐ Q2  
☐ Q3  
☐ Q4



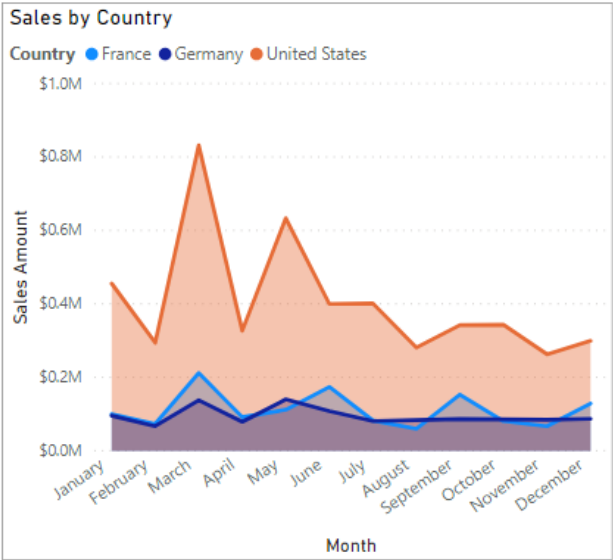
# Choosing Effective Visualizations



The right visual makes all the difference.

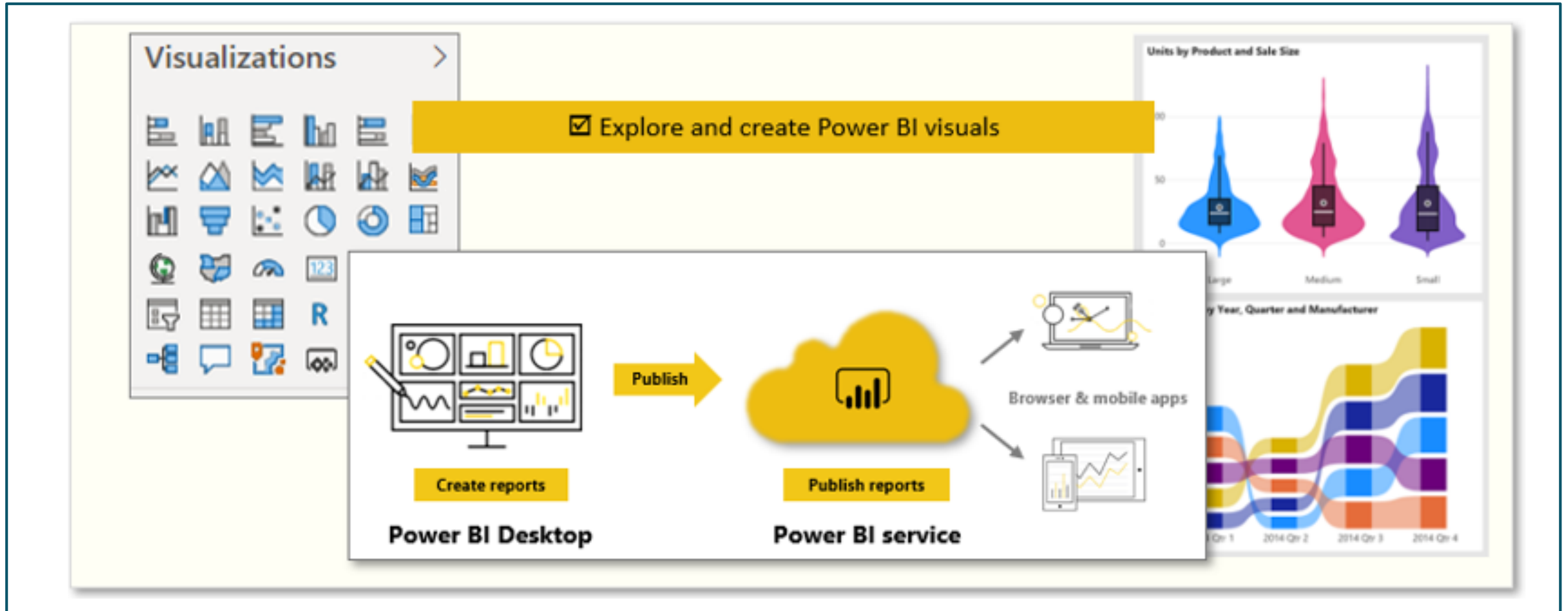


Line Chart



Area Chart

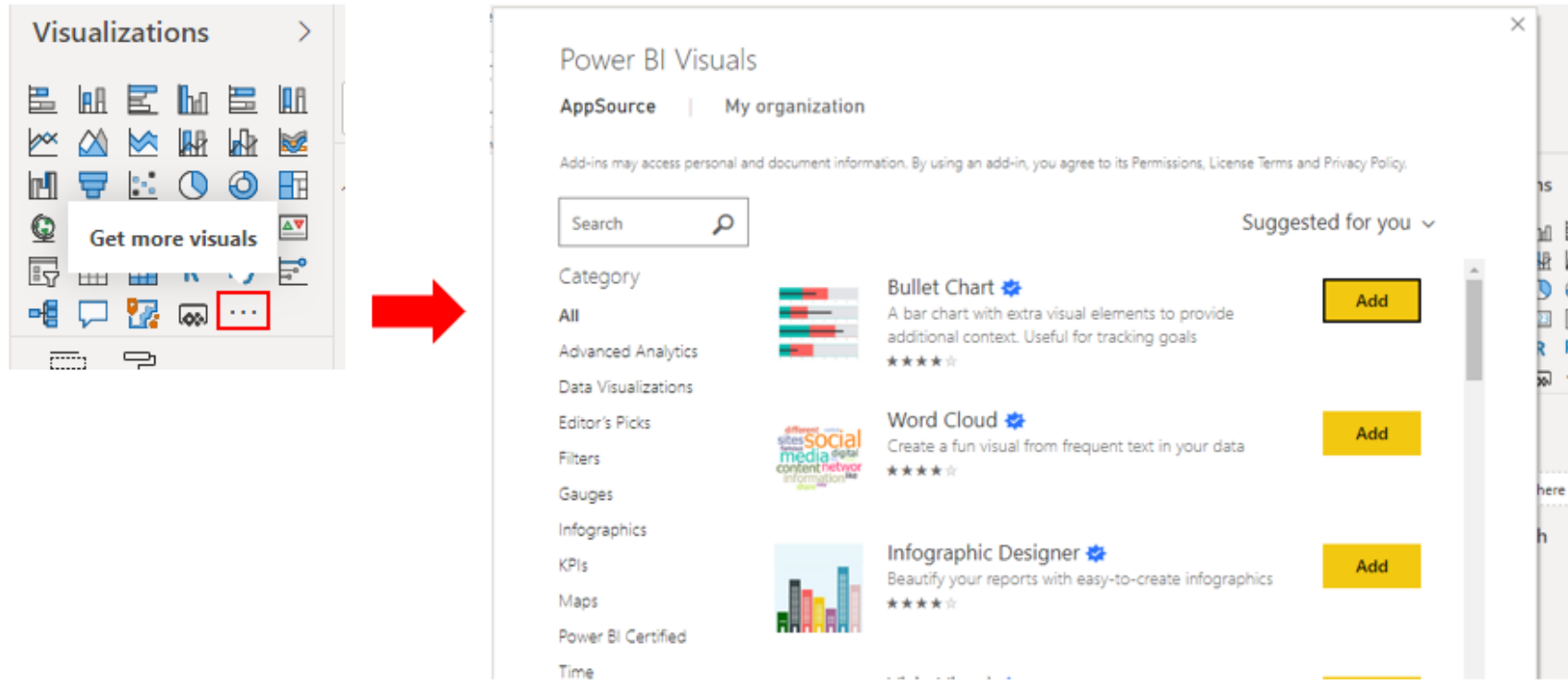
# Adding Visualizations to Reports



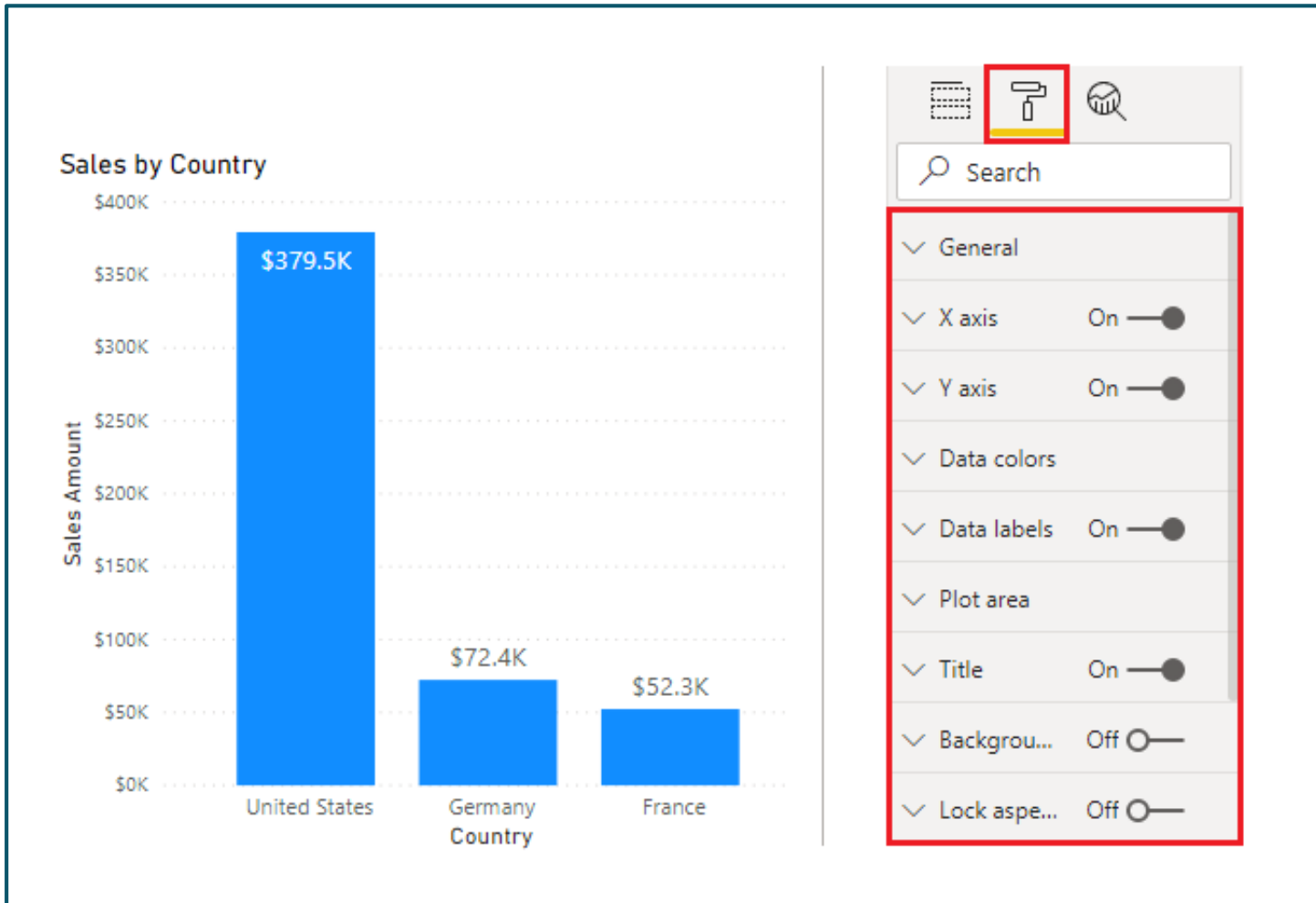


# Import a Custom Visual

Use visuals tailored for your needs.

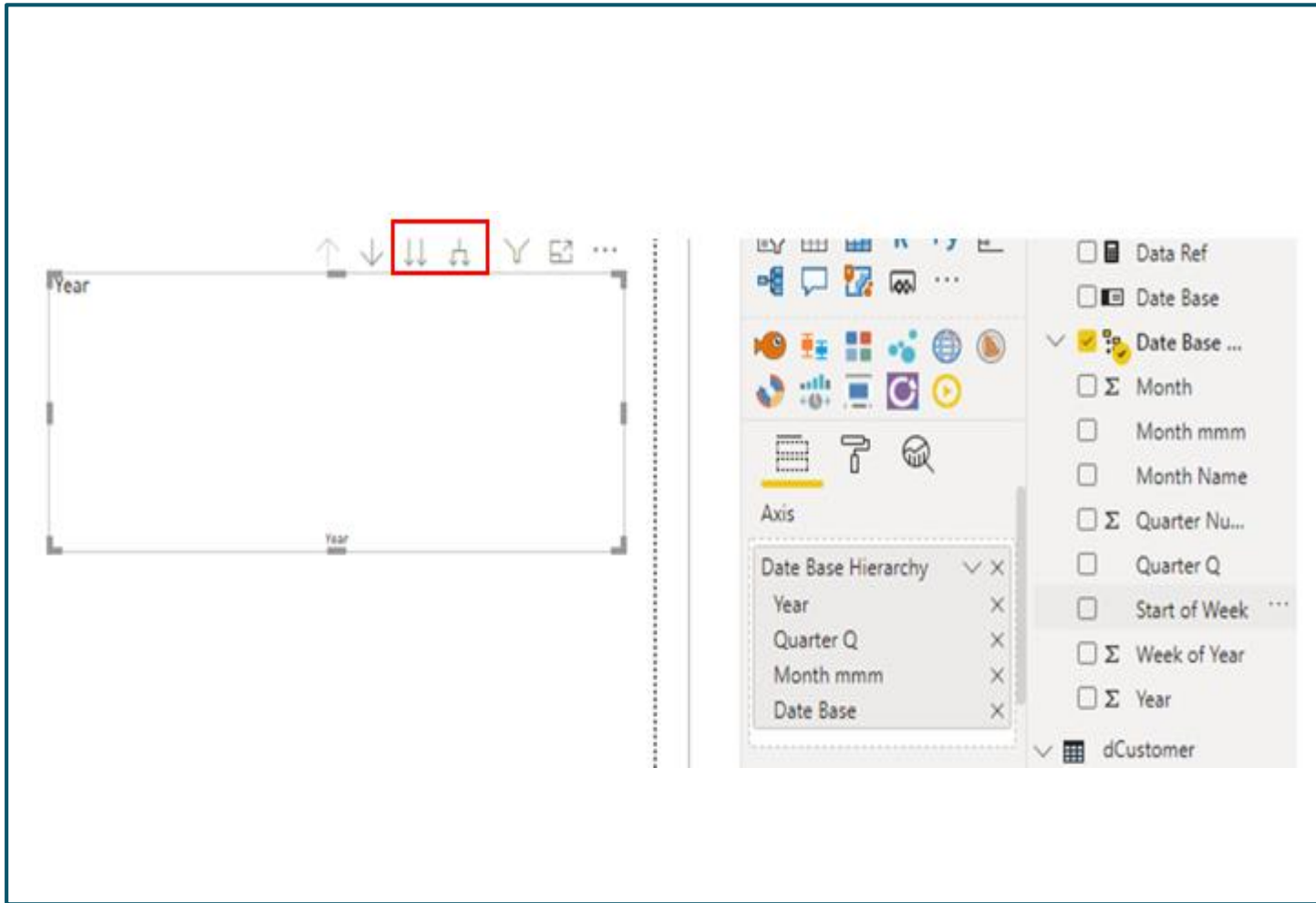


# Format and Configure Visualizations



- Control the look and feel of each visual.
- Format options differ depending on the type of visual selected.

# Basic Interactions



Use interactions to change how visuals impact each other.

Use hierarchies to drill down for additional relevant content.

# Configure Conditional Formatting

Region	Sales
Southwest	\$18,001,116
Canada	\$13,875,633
Northwest	\$12,004,822
Southeast	\$7,638,607
Central	\$7,633,387
Northeast	\$6,715,354
France	\$4,527,840
United Kingdom	\$3,883,043
Germany	\$1,877,743
Australia	\$1,391,025
Total	\$77,548,570

Visualizations

Fields

Filters

Conditional formatting

Background color

Font color

Data bars

Icons

Web URL

Title

Search

Targets

Date

Product

Region

Country

Group

Regions

Reseller

Sales

Salesperson

Salesperson (Performan...

Background color - Sales

Format by

Color scale

Apply to

Values only

Based on field

Sum of Sales

Summarization

Sum

Default formatting

As zero

Minimum

Lowest value

Center

Middle value

Maximum

Highest value

Enter a value

Enter a value

Enter a value

Diverging

Learn more

OK

Cancel

# Design Report Navigation



Move users between pages.  
Use buttons, bookmarks, or  
conditional formatting.

# Review Questions

- **Q01 – What is the benefit of using a report tooltip?**
  - A01 – To provide additional detail that is specific to the context of the data that is being hovered over.
- **Q02 – Do you need to import custom visuals each time you want to use them when you are developing a new report?**
  - A02 – Yes, custom visuals need to be imported from AppSource each time you start developing a new report unless you pin the custom visual to the visualizations pane.

# Lesson Review

- Visuals allow you to share data insights more effectively.
- Using effective visualizations help users connect and interact with the information.

# Lab: Design a Report in Power BI Desktop, Part 1

Lab: Design a Report in Power BI Desktop, Part 1





# Lesson 2: Enhance the Report



# Introduction to Report Enhancement

- Organizations rely on report information when making decisions.
- Reports drive organizational behavior and action.

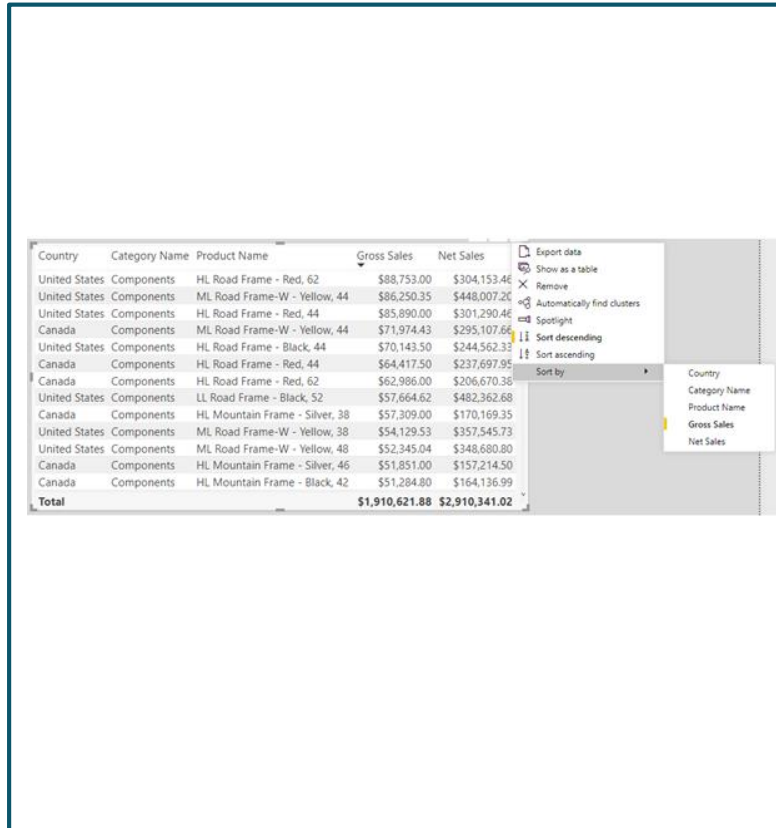
# Apply Slicing, Filtering, and Sorting

## Specifies

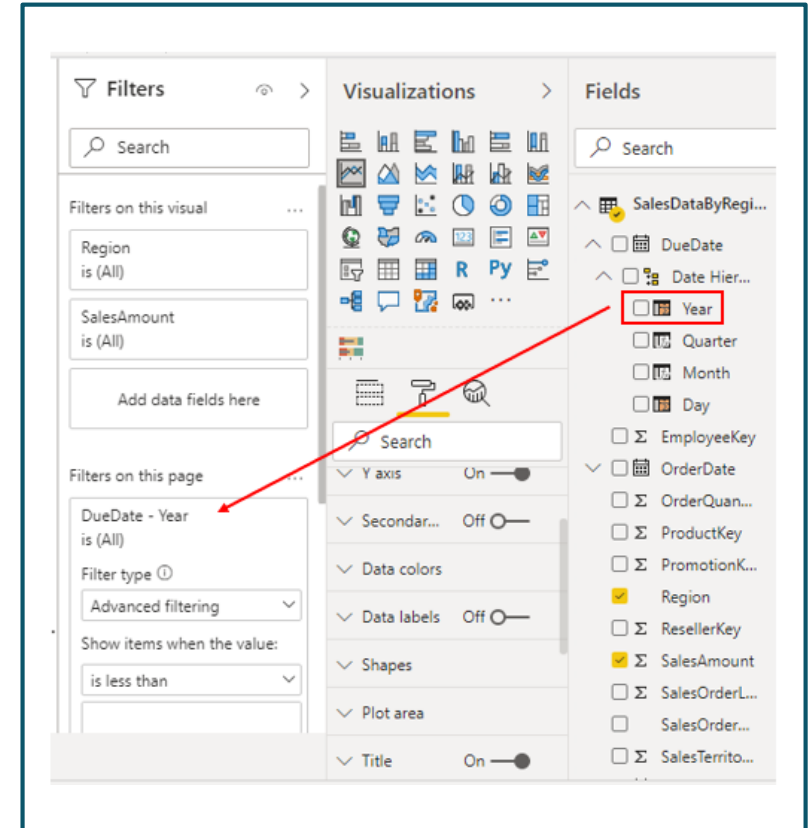


**TAILWIND TRADERS**

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
	Q1	Q2	Q3	Q4								
Country												
Category Name												
Product Name												
Gross Sales												
Net Sales												
United States	Components	ML Road Frame-W - Yellow, 44	\$86,250.35	\$448,007.20								
Canada	Components	ML Road Frame-W - Yellow, 44	\$71,974.43	\$295,107.66								
United States	Components	LL Road Frame - Black, 52	\$57,664.62	\$482,362.68								
United States	Components	ML Road Frame-W - Yellow, 38	\$54,129.53	\$357,545.73								
United States	Components	ML Road Frame-W - Yellow, 48	\$52,345.04	\$348,680.80								
Canada	Components	ML Road Frame-W - Yellow, 48	\$43,422.59	\$255,683.27								
Canada	Components	LL Road Frame - Black, 52	\$37,431.42	\$308,463.17								
United States	Components	LL Road Frame - Red, 60	\$37,094.20	\$278,484.66								
United States	Components	LL Road Frame - Red, 44	\$36,082.54	\$278,662.07								
United States	Components	LL Road Frame - Black, 58	\$32,710.34	\$328,946.58								
Canada	Components	LL Road Frame - Black, 58	\$32,035.90	\$267,869.53								
Canada	Components	LL Road Frame - Red, 44	\$28,326.48	\$200,708.54								
<b>Total</b>			<b>\$729,936.88</b>	<b>\$1,489,832.44</b>								



Country	Category Name	Product Name	Gross Sales	Net Sales
United States	Components	HL Road Frame - Red, 62	\$88,753.00	\$304,153.46
United States	Components	ML Road Frame-W - Yellow, 44	\$86,250.35	\$448,007.20
United States	Components	HL Road Frame - Red, 44	\$85,890.00	\$301,290.46
Canada	Components	ML Road Frame-W - Yellow, 44	\$71,974.43	\$295,107.66
United States	Components	HL Road Frame - Black, 44	\$70,143.50	\$244,562.32
Canada	Components	HL Road Frame - Red, 44	\$64,417.50	\$237,697.95
Canada	Components	HL Road Frame - Red, 62	\$62,986.00	\$206,670.36
United States	Components	LL Road Frame - Black, 52	\$57,664.62	\$482,362.68
Canada	Components	HL Mountain Frame - Silver, 38	\$57,309.00	\$170,169.35
United States	Components	ML Road Frame-W - Yellow, 38	\$54,129.53	\$357,545.73
United States	Components	ML Road Frame-W - Yellow, 48	\$52,345.04	\$348,680.80
Canada	Components	HL Mountain Frame - Silver, 46	\$51,851.00	\$157,214.50
Canada	Components	HL Mountain Frame - Black, 42	\$51,284.80	\$164,136.99
<b>Total</b>			<b>\$1,910,621.88</b>	<b>\$2,910,341.02</b>



**Filters**

Search

Filters on this visual

Region is (All)

SalesAmount is (All)

Add data fields here

Filters on this page

DueDate - Year is (All)

Filter type: Advanced filtering

Show items when the value: is less than

**Visualizations**

Search

Y axis: On

Secondary axis: Off

Data colors: On

Data labels: Off

Shapes: On

Plot area: On

Title: On

**Fields**

Search

SalesDataByRegion

DueDate

Date Hierarchy

Year

Quarter

Month

Day

EmployeeKey

OrderDate

OrderQuantity

ProductKey

PromotionKey

Region

ResellerKey

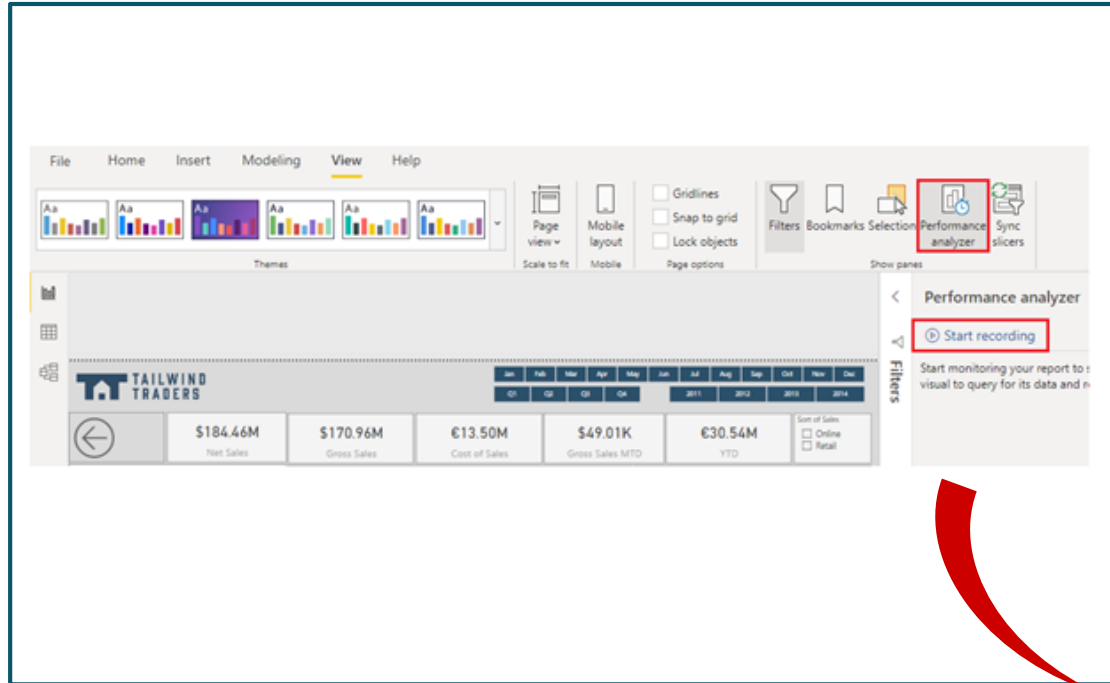
SalesAmount

SalesOrderID

SalesOrderLineID

SalesTerritoryID

# Performance Tuning Reports



The performance of a report depends on how quickly data can load into the report page.

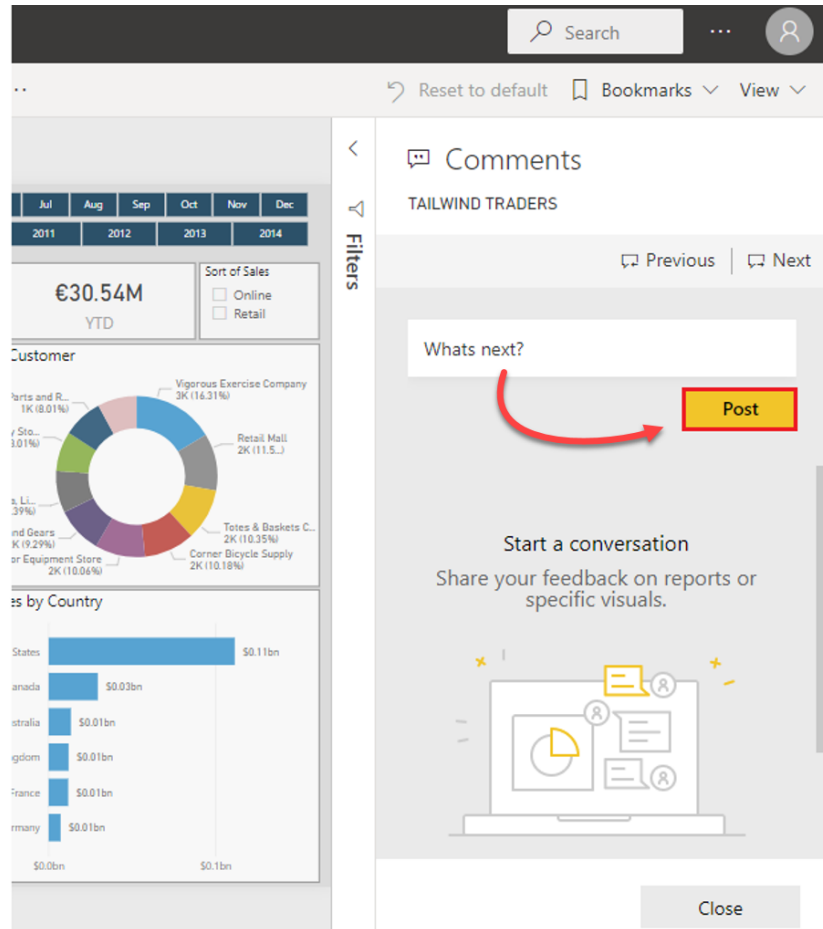
Performance analyzer

[Start recording](#) [Refresh visuals](#) [Stop](#)

[Clear](#) [Export](#)

Name	Duration (ms) ↓
Recording started (16/06/2020 00:13:52)	-
Changed page	-
Net Sales	1435
MTD card	1491
DAX query	46
Visual display	31
Other	1414
<a href="#">Copy query</a>	
YTD card	1983
Cost of Sales	1550
Cross Sales	1655
Gross Sales by Year by Month	1312
Net Sales by Country	1831
Top 10 Products	1355
Top 10 Customer	1587
Product Category	2023
Sort of Sales	1034
Slicer	1726
Slicer	1190
Slicer	1896
Image	305
Button	115

# Commenting on Reports

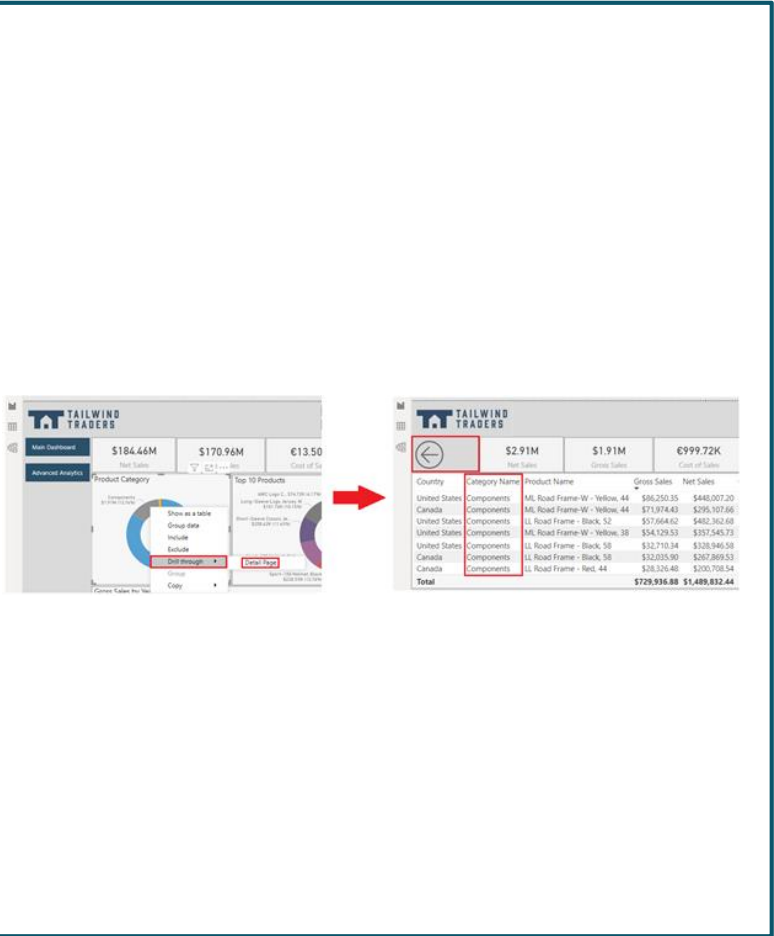
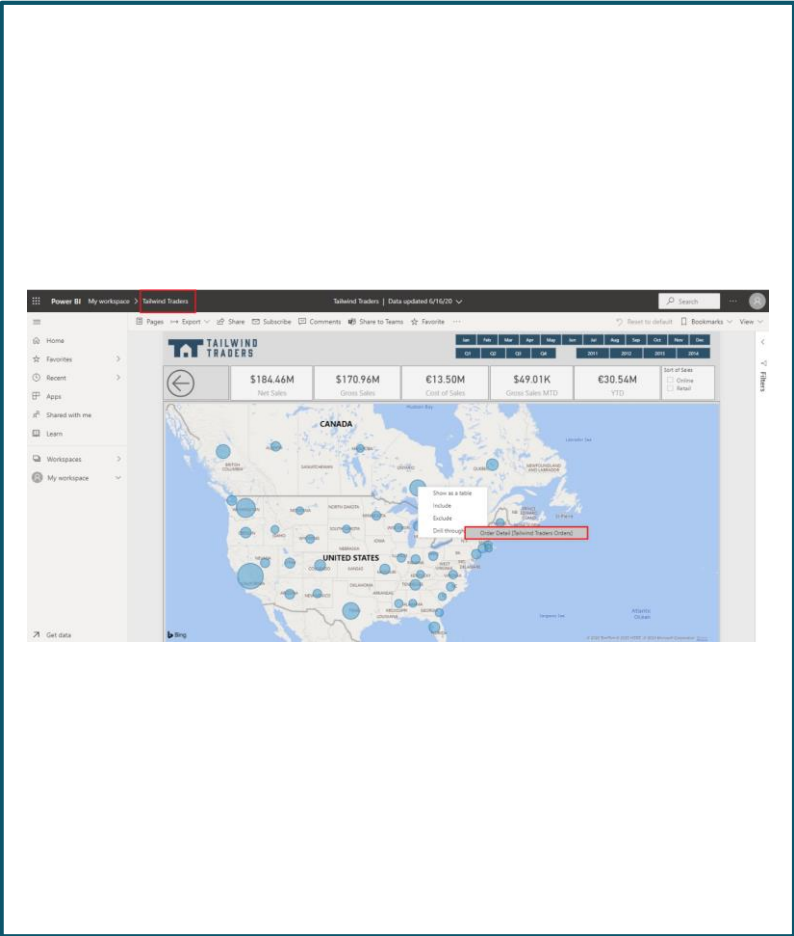
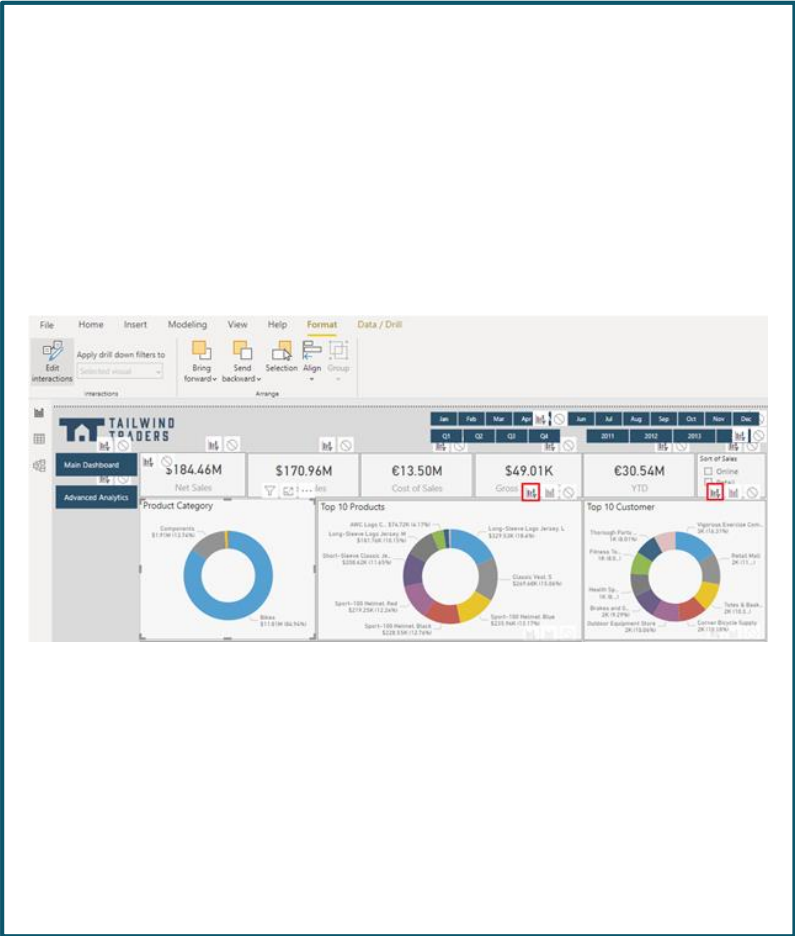


Used for personal comments or for collaborating with a colleague.

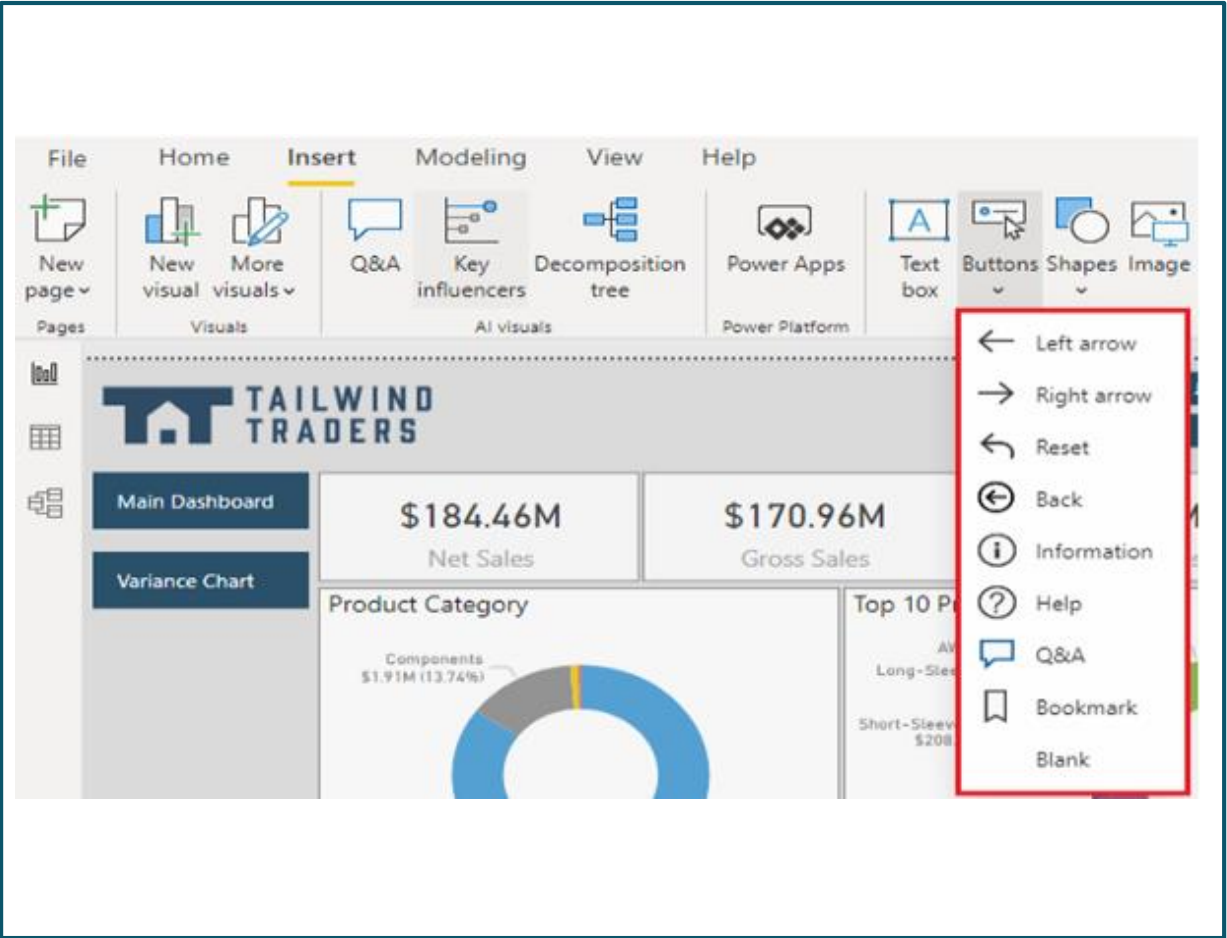
Available for paginated reports, dashboards, and visuals.

Anyone with permissions can see comments.

# Advanced Interactions and Drill-Throughs

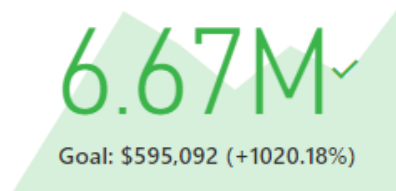


# Adding Buttons, Bookmarks, and Selections

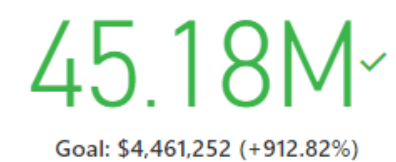


# Key Performance Indicators

TotalSales and Goal by Month



TotalSales and Goal by FiscalYear



TotalUnits and Last Year Sales ...



An excellent source in helping track toward a specific goal over time.

Best when used in a series (e.g., daily, monthly, etc.).



# Publish and Export Reports

Power BI My workspace > Tailwind Traders

Tailwind Traders | Data updated 6/16/20

Export Share Subscribe Comments Share to Teams Favorite

Reset to default Bookmarks

TAILWIND TRADERS

Net Sales \$184.46M Gross Sales \$170.96M Cost of Sales €13.50M Gross Sales MTD \$49.01K Gross Sales YTD €30.54M

Product Category Top 10 Products Top 10 Customer

Gross Sales by Year by Month Net Sales by Country

File Home Insert Modeling View Help

Paste Cut Copy Format painter

Get data Power BI datasets SQL Server Enter data Recent sources

Transform Refresh data

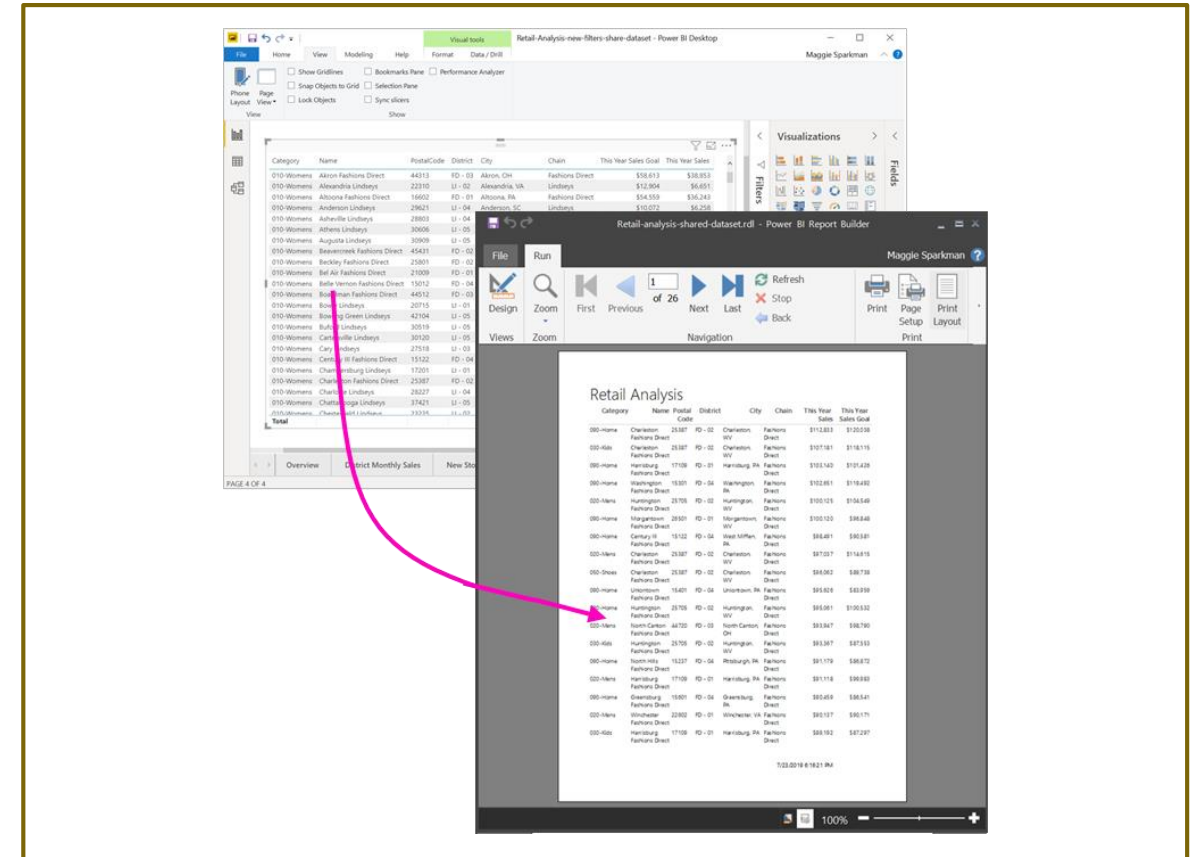
New visual Text box More visuals

New measure Quick measure

Publish

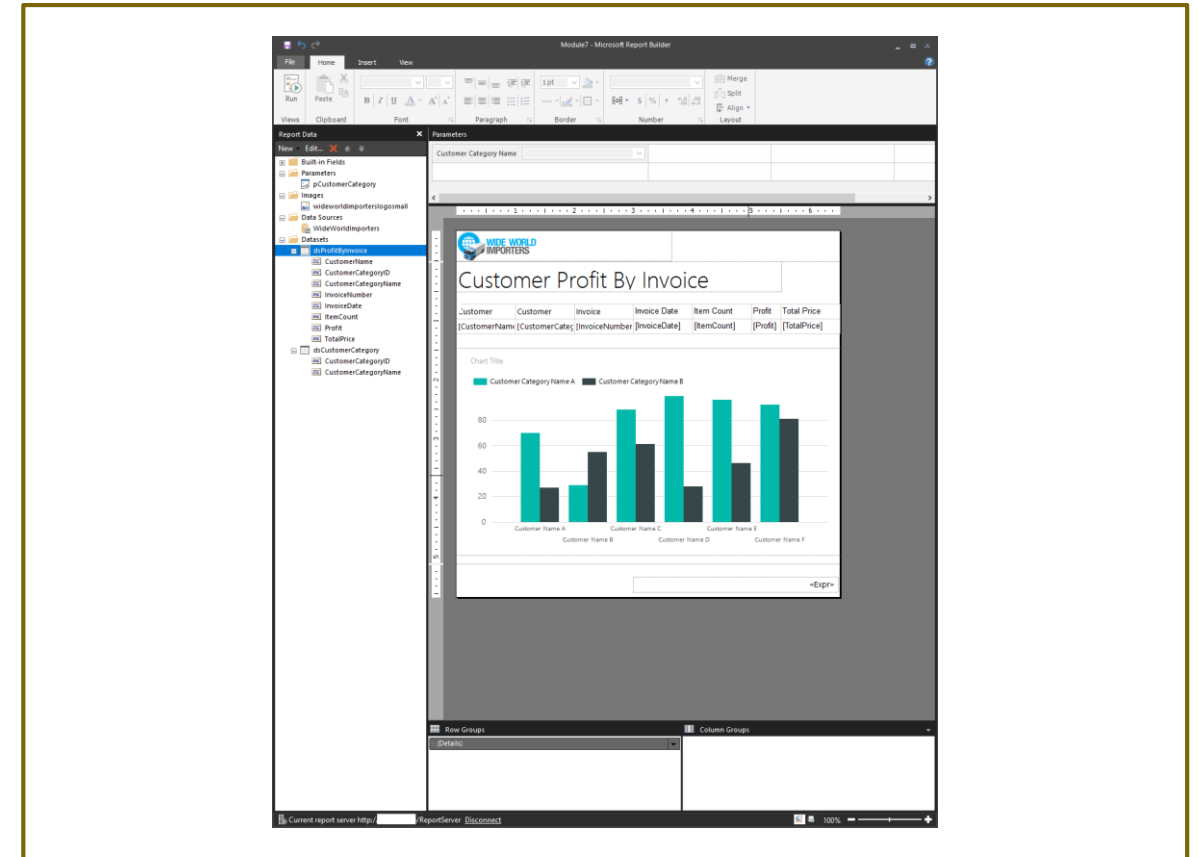
# Introduction to Paginated Reports

- Descendant of SQL Server Reporting Services.
- Created in Power BI Report Builder.
- Part of Power BI Premium.



# When are they the right fit?

- Operational reports with tables of detail.
- Headers and footers are needed.
- Customized sort orders.
- Clickable headers.
- Rendering tabular data.



# Review Questions

- **Q01 – Which filter is not available in Power BI reports?**
  - A01 – Page Type
- **Q02 – How can you analyze performance of each of your report elements?**
  - A02 – By using performance analyzer.
- **Q03 – Can you use bookmarks to create a slide show in Power BI?**
  - A03 – Yes, you can.

# Lesson Review

- Organizations rely on report information when making decisions.
- Reports drive organizational behavior and action.

# Lab: Design a Report in Power BI Desktop, Part 2

Lab: Design a Report in Power BI Desktop, Part 2



# Module Overview

We covered the following concepts:

- Design a Report
- Enhance a Report

# References

PL-300 Work with Power BI visuals

<https://docs.microsoft.com/en-us/learn/modules/visuals-power-bi/>

PL-300 Create a data-drive story with Power BI

<https://docs.microsoft.com/en-us/learn/modules/data-driven-story-power-bi/>

