Power BI

Dashboard in an Hour

by Power BI Team, Microsoft

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Problem Statement

The dataset provided focuses on sales and market share analysis. This type of analysis is very common for the office of a Chief Marketing Officer (CMO). Unlike the office of the Chief Financial Officer (CFO), a CMO is focused not only on company's performance internally (how well do our products sell) but also externally (how well do we do against the competing products).

Our company, VanArsdel, manufactures expensive electronic products that could be used for fun as well as work and it sells them directly to consumers in three major markets. VanArsdel and its competitors have retained a 3rd party marketing company to collect and anonymize industry sales so that all participants can benchmark themselves.

Sales data along with details of Product, Date and Geography are available in an Excel workbook. Data from these sources need to be brought together to analyze and report on.

Document Structure

This document has two main sections:

- **Power BI Desktop**: This section highlights the features available in Power BI Desktop and walks the user through the process of bringing in data from the data source, modeling and creating visualizations.
- **Power BI Service**: This section highlights the features available in Power BI Service including the ability to publish the Power BI Desktop model to the web, creating and sharing dashboard and Power Q & A.

The document flow is in a table format. On the left panel are steps the user needs to follow and in the right panel are screenshots to provide a visual aid for the users. In the screenshots, sections are highlighted with red boxes to highlight the action/area user needs to focus on.

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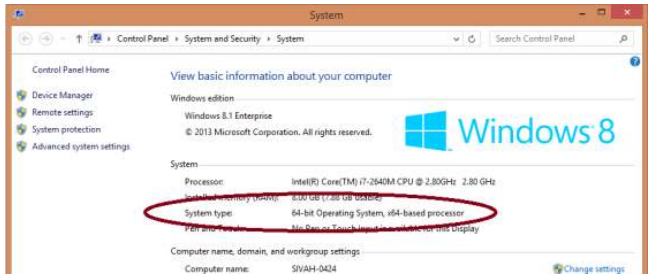
Prerequisites

Following prerequisites and setup has to be complete for successful completion of the exercise:

- You must be connected to the internet
- **Signup for Power BI:** Go to http://aka.ms/diahtraining and sign up for Power BI with a business email address. If you cannot sign up for Power BI, let the instructor know
- Please go to http://app.powerbi,com and **Sign in** using your **Power BI account**
- At minimum, a computer with 2-cores and 4GB RAM running one of the following version of Windows: Windows 10, Windows 7, Windows 8, (64-bit preferred), Windows 8.1, Windows Server 2008 R2, Windows Server 2012, Windows Server 2012 R2
- Microsoft Power BI Desktop requires Internet Explorer 9 or greater
- Verify if you have 32-bit or 64-bit operating system to decide if you need to install the 32-bit or 64-bit applications
    - Search for computer on your PC, right click properties for your computer
    - You will be able to identify if your operating system is 64 or 32 bit based on "system type" as shown below



- **Download the Power BI Content**: Create a folder called **DIAH** on an appropriate drive on your local machine. Copy all contents from the folder called **Dashboard in an Hour Assets** on the flash drive to the **DIAH** folder on your local drive. E.g. C:\DIAH
- **Download and install Power BI Desktop:** Download and install Microsoft Power BI Desktop from http://www.microsoft.com/en-us/download/details.aspx?id=45331. Optionally, you can also install the Power BI Desktop tool from the **Power BI Desktop Install** folder on the flash drive. Please choose appropriate 64-bit or 32-bit version depending on your platform. Microsoft Power BI Desktop is available for 32-bit (x86) and 64-bit (x64) platforms
- **Download and install the Microsoft Power BI Mobile app** on your mobile device. App is available on Apple Store, Android Play Store and Windows Store

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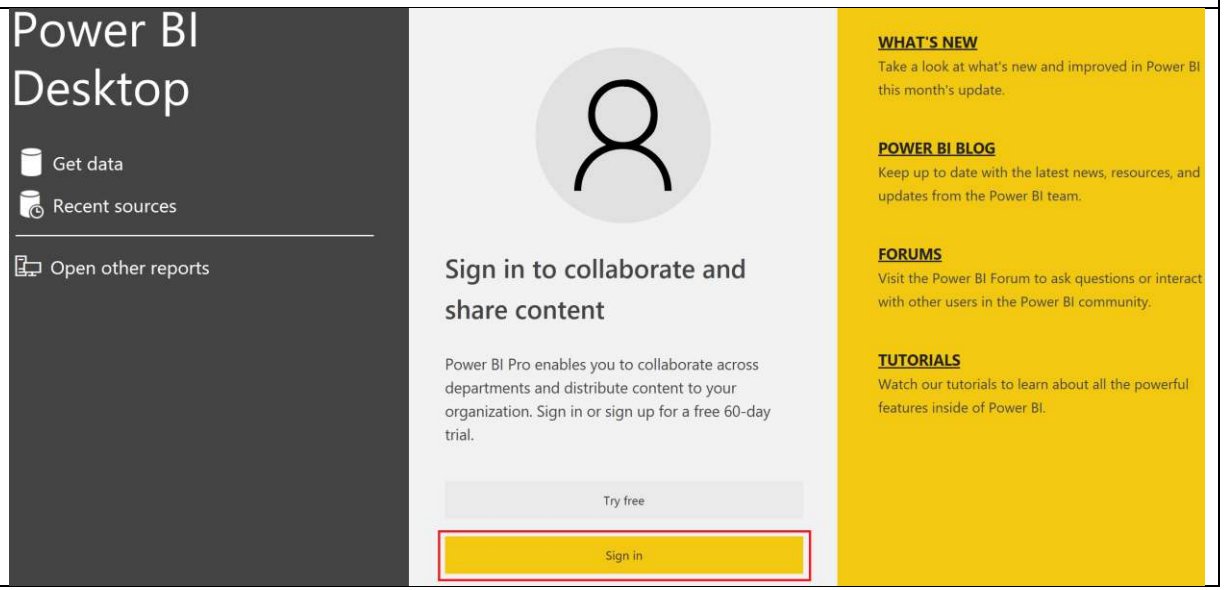
NOTE: This lab is using real anonymized data and is provided by ObviEnce LLC. Visit their site to learn about their services: www.obvience.com . This data is property of ObviEnce LLC and has been shared for the purpose of demonstrating PowerBI functionality with industry sample data. Any uses of this data must include this attribution to ObviEnce LLC.

Power BI Desktop - Get Data

1. If you have not already done this, on your local machine, create a folder called **DIAH**
2. Copy contents provided to **DIAH** folder
3. Launch **Power BI Desktop**
4. Once Power BI Desktop opens, startup screen opens as well
5. Click on **Sign In** and sign in using your Power BI credentials. Signing in to Power BI Desktop helps later when you are publishing to Power BI Service



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