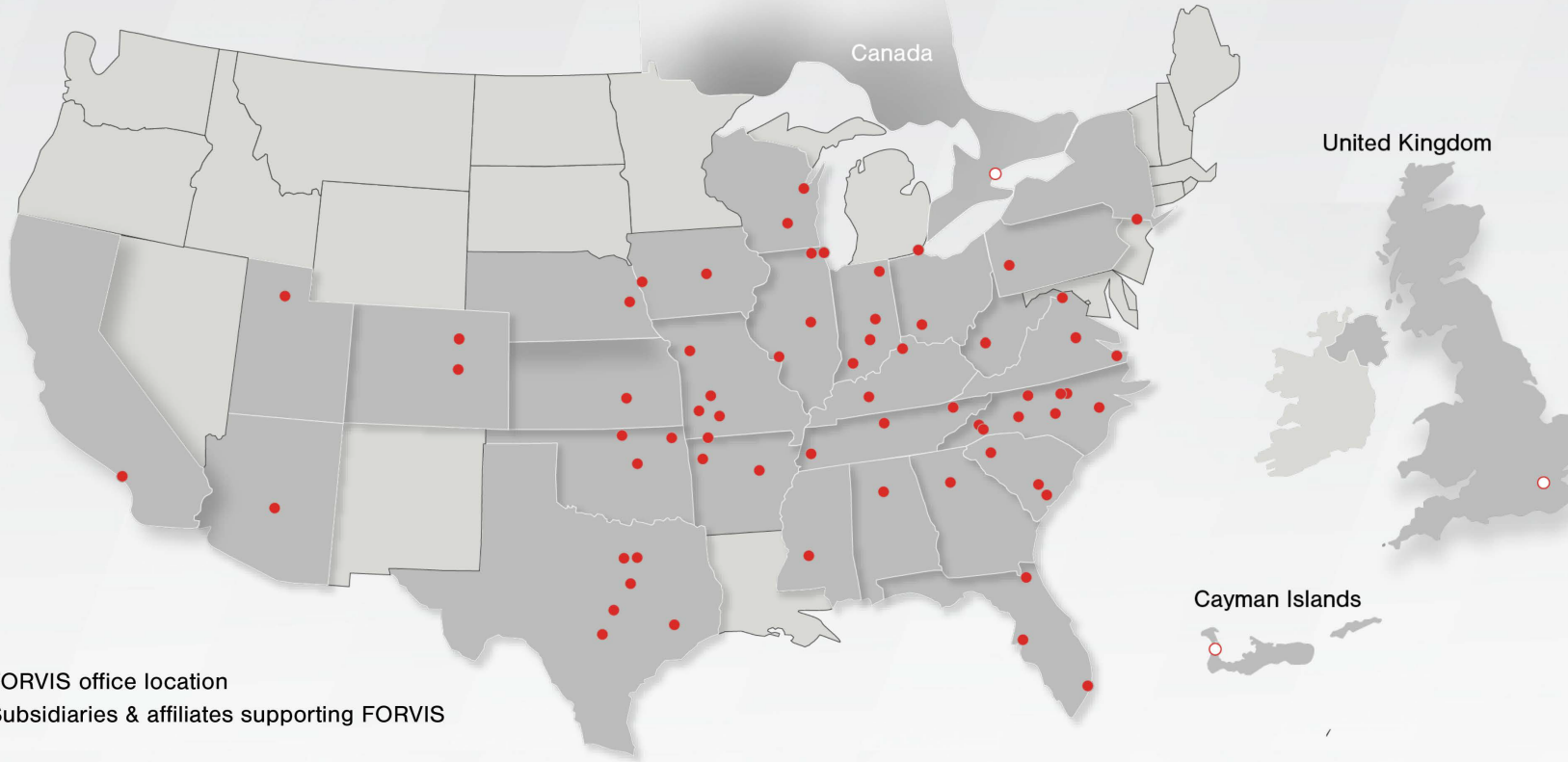# FORV/S ®

Business Technology Solutions

Bring Your Data Alive in 2024 With Power BI

January 25, 2024

Global Presence & Reach

● FORVIS office location
○ Subsidiaries & affiliates supporting FORVIS

Canada

United Kingdom

Cayman Islands

Subsidiaries & Affiliates Supporting FORVIS

- FORVIS Capital Advisors, LLC
- FORVIS Wealth Advisors, LLC
- FORVIS Global Advisory Canada ULC**
- FORVIS Global Advisory Ltd. UK**
- TALENT SHIFT, LLC

By the Numbers

Top 10
U.S. Public Accounting Firm *

27
States + Canada, U.K., & **
Cayman Islands

10+
Industries

68
Markets

500+
Partners & Principals

6,000+
Team Members

FORV/S

PRAXITY™
Empowering Business Globally

FORVIS is a member of Praxity™, an international alliance of independent accounting firms that offers multinational clients access to resources around the world.

Business Technology Solutions

Business Technology Solutions at **FORVIS** provides enterprise resource planning (ERP) and customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, and support services.

In addition, our Insights & Automation services include business intelligence (BI) and robotic process automation (RPA) assessments, implementations, and training.

From sales forecasting to financial reporting, learn what CRM and ERP technologies can do.

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Meet the Presenter
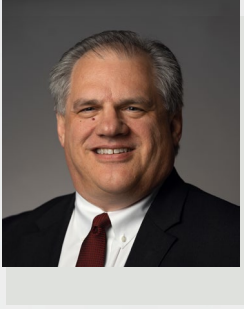
Charles Allen
Senior Managing Consultant

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Objectives

- Describe how the insights feature is used to get answers to questions

- Explain how users can get notifications about report results

- Define how artificial intelligence & ad hoc reporting can be used in Power BI

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Agenda

9:00 a.m. CT	●	Insights
9:20 a.m.	●	Ad Hoc Reporting
9:35 a.m.	●	Notifications & Sharing

Insights

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Insights

- AI-enabled functionality

- Helps you spot trends & anomalies

- Part of Power BI Premium

Find insights in your reports – Power BI | Microsoft Learn

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Insights

- Individual visuals
- Dashboard tiles
- Datasets
- Data models

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Insights

Let's visualize it!

Ad Hoc Reporting

Ad Hoc Reporting

- Power BI Desktop

- Explore this data

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Power BI Desktop

- Provides users the ability to create reports

- Ensure the users have the proper data set

- Ensure measures are provided

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Explore This Data

- Used in Power BI Online

- November 2023 release

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Ad Hoc Reporting

Let's visualize it!

Notifications & Sharing

Notifications & Sharing

Share Power BI Desktop Files

Report Subscriptions

Share a Dashboard

Chatting With Teams

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Subscriptions

- Reports or Dashboards

- Subscribe for yourself & others

- Email notifications

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Let's visualize it!

What's Next

Better Reporting:
How NetSuite &
Solver Can Help

February 13
10 a.m. CT

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WEBINAR

Better Reporting: How
NetSuite & Solver Can Help

Tuesday, February 13 • 11 a.m.–12 p.m. ET

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Questions?

Thank you!

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