

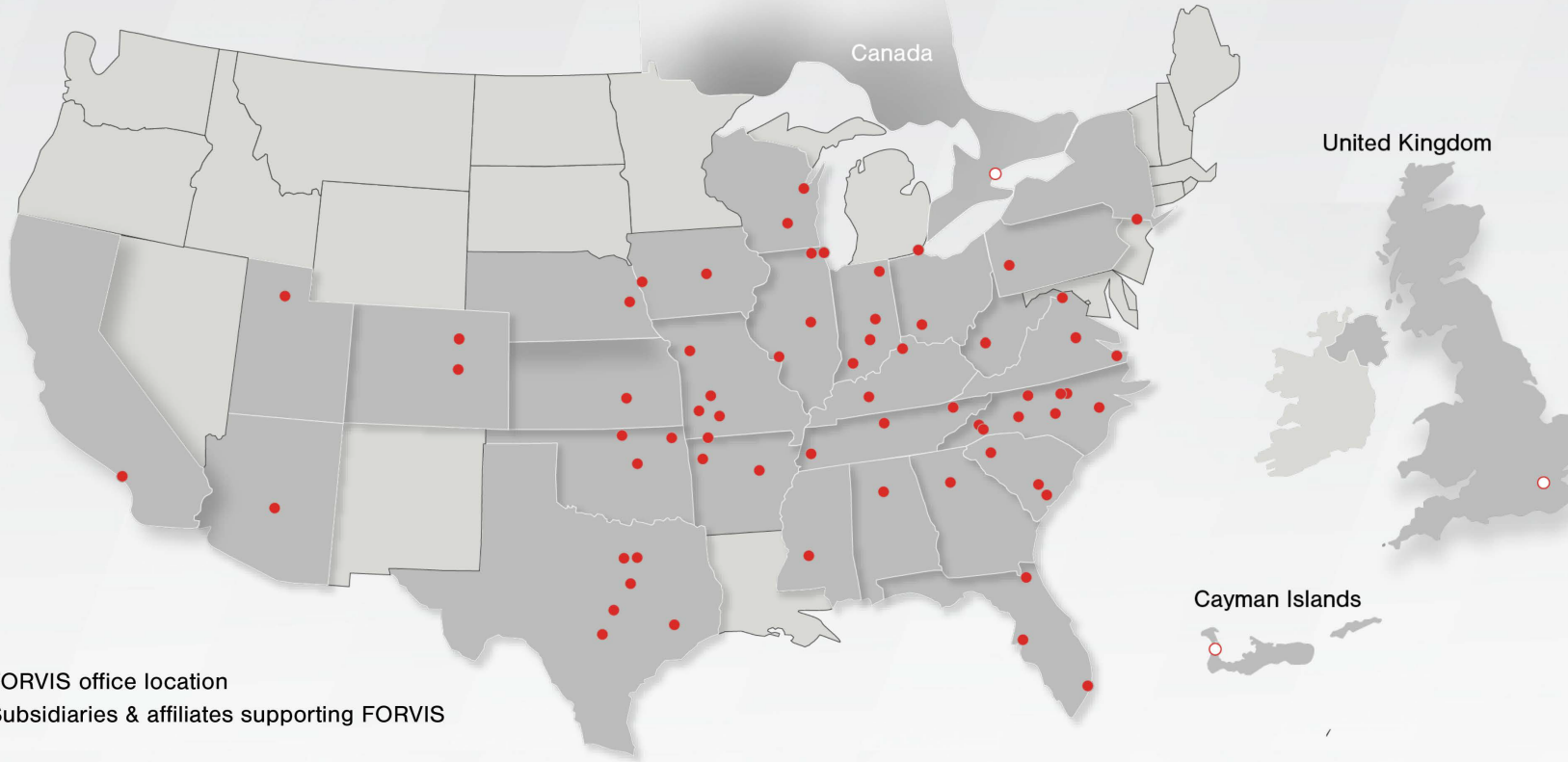
FORVIS[®]

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

Subsidiaries & Affiliates Supporting FORVIS

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

FORVIS

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



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.

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Microsoft
Partner

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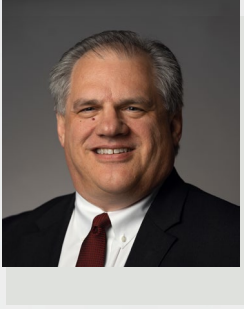
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NETSUITE
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From sales forecasting to financial reporting,
learn what CRM and ERP technologies can do.

Meet the Presenter



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Senior Managing Consultant

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Business Technology Solutions

Bring Your Data Alive in 2024 With Power BI

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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

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

Insights

Solver Labor Reports

Search

File Export Share Chat in Teams Explore this data Get insights Subscribe to report Set alert Edit

Pages: Page 1, Page 2, Page 3

hours by gp payroll dept

42.30K hours

676.20K amount paid

Filters: amount paid is (All)

Insights: hours analysis, amount paid analysis

hours analysis: Overall hours is currently at 42296.32 hours for payroll code SALY_P and other segments are significantly higher than others.

amount paid analysis: Overall amount paid is currently at 676204.91. amount paid for gp payroll codes SALY_P and other segments are significantly higher than others.

payroll_code	Non-Productive	Productive	Total
BONS	0.00		0.00
COMM	0.00		0.00
HOLI	1,185.67		1,185.67
HOUR		9,750.41	9,750.41
OVER		6.67	6.67
SALY		31,238.57	31,238.57
SICK		33.00	33.00
VACN		82.00	82.00
Total	0.00	1,300.67	40,995.65

gp payroll dept

periodend

- 1/30/2013 6:00:00 PM
- 2/27/2013 6:00:00 PM
- 3/30/2013 7:00:00 PM
- 4/29/2013 7:00:00 PM
- 5/30/2013 7:00:00 PM
- 6/29/2013 7:00:00 PM
- 7/30/2013 7:00:00 PM
- 8/30/2013 7:00:00 PM
- 9/29/2013 7:00:00 PM
- 10/30/2013 7:00:00 PM
- 11/29/2013 6:00:00 PM
- 12/30/2013 6:00:00 PM
- 1/30/2014 6:00:00 PM

66%

Let's visualize it!



Ad Hoc Reporting

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Ad Hoc Reporting

- Power BI Desktop
- Explore this data

Power BI Desktop

- Provides users the ability to create reports
- Ensure the users have the proper data set
- Ensure measures are provided

Explore This Data

- Used in Power BI Online
- November 2023 release

Ad Hoc Reporting

Explore Product Revenue (preview) ✕

Save ▼ 🖨️ 🔗 📄 Open in new tab 🔗 Share

➕ Add filter fyyear is 2021 ✕ 🗑️ Remove filters

📊 Matrix

department	Sum of extended price
300	9,700,118.35
500	4,686,028.93
Total	16,268,662.28

👁️ Visual 📊 📄 📈 📊 📄 ⚡ 📏 Sort 🔍 Drill

Sum of extended price by department

Visual | 📊 📄 📈 📊 📄 ⚡ 📏 Sort 🔍 Drill

Sum of extended price by department

Sum of e... 10M 5M 0M

Data ➤

Choose data ⤴

🔍 Search

- calendarmonth
- calendaryear
- day
- entity
- fymonthlabel
- fyperiod

Rearrange data ⤴

X-axis

department ✕ | >

+ Add data

Y-axis

Sum of extended... ✕ | >

+ Add data

Let's visualize it!



Notifications & Sharing

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Notifications & Sharing

- Share Power BI Desktop Files
- Report Subscriptions
- Share a Dashboard
- Chatting With Teams

Subscriptions

- Reports or Dashboards
- Subscribe for yourself & others
- Email notifications

Let's visualize it!



What's Next

Better Reporting:
How NetSuite &
Solver Can Help

February 13
10 a.m. CT

FORV/S



WEBINAR

Better Reporting: How
NetSuite & Solver Can Help

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

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Questions?

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Thank you!

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Assurance / Tax / Consulting