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Solver Power BI Series Episode 2: Visualizing Your Data

February 16, 2023

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Presenter



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Objectives

- Explain how to add visualizations to reports
- Discuss how users interact with reports
- Describe how visualizations work together on a page

AGENDA

9:00 am ● The Power BI Desktop Interface

9:10 am ● Creating Visualizations

9:25 am ● Slicing & Dicing

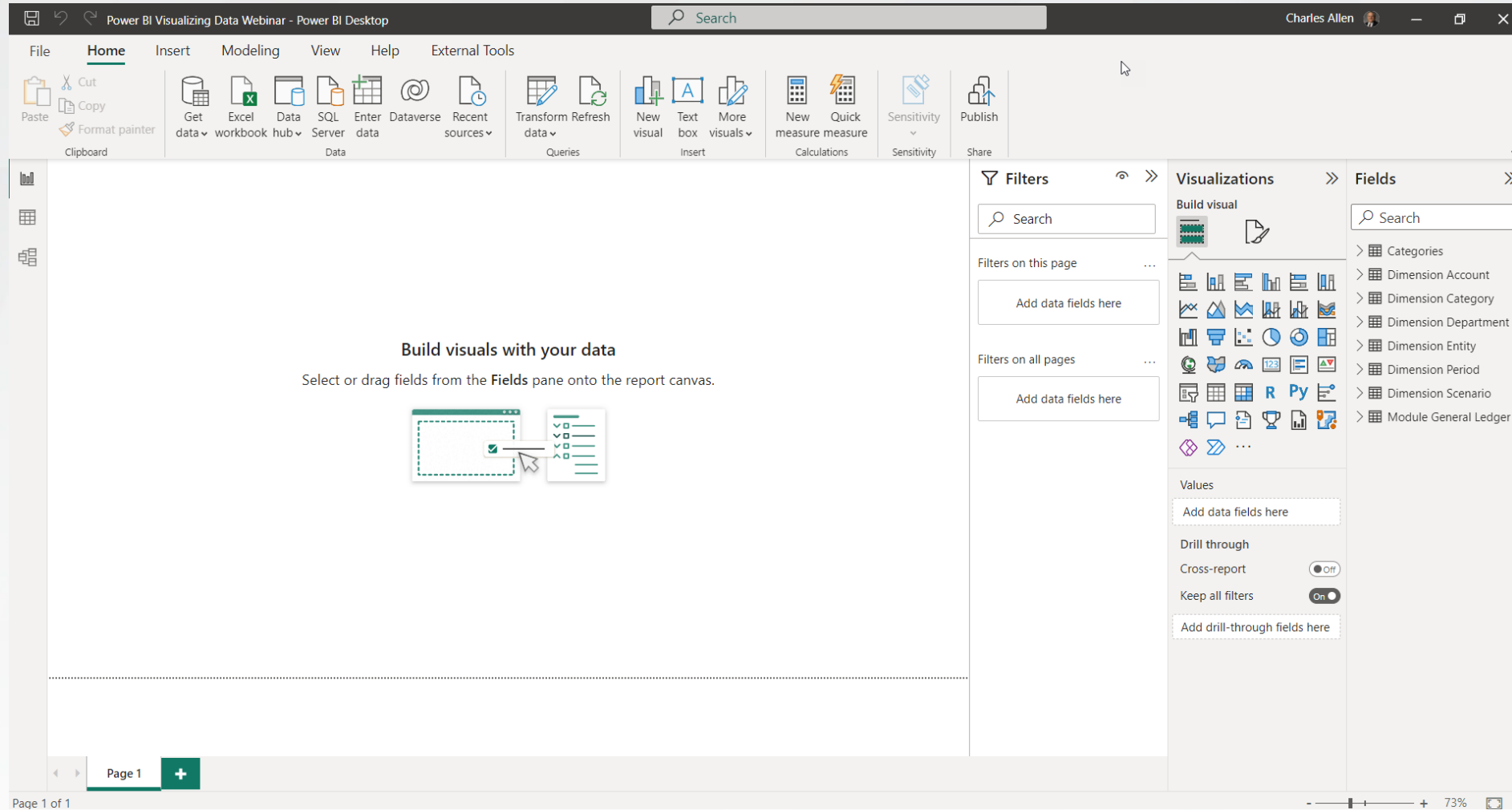
9:40 am ● Interacting with Visualizations

The Power BI Desktop Interface

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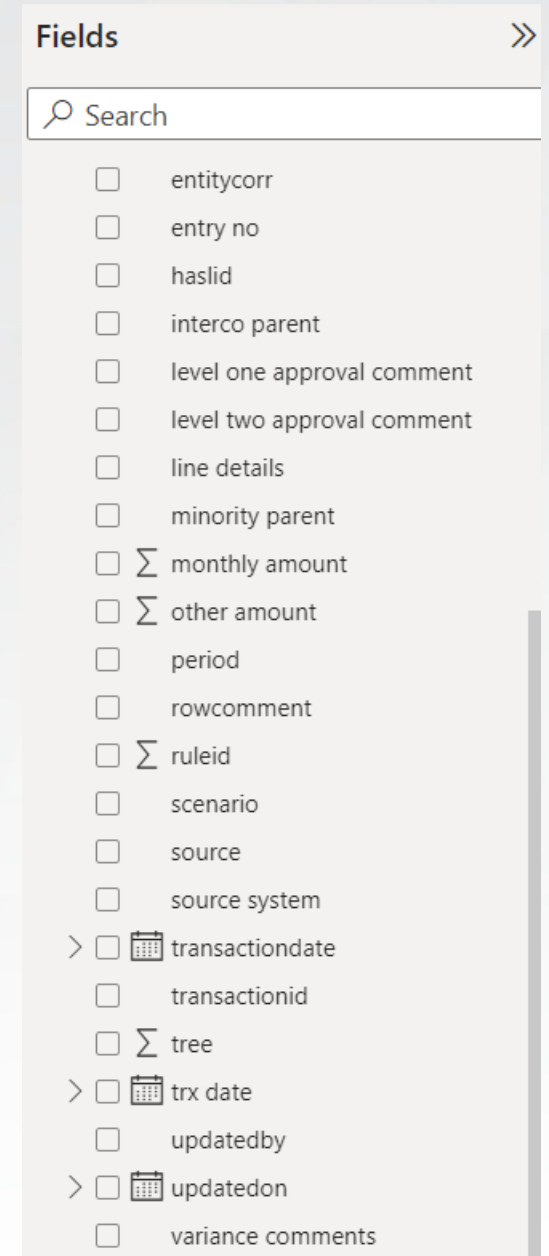
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Power BI Desktop



Power BI Desktop

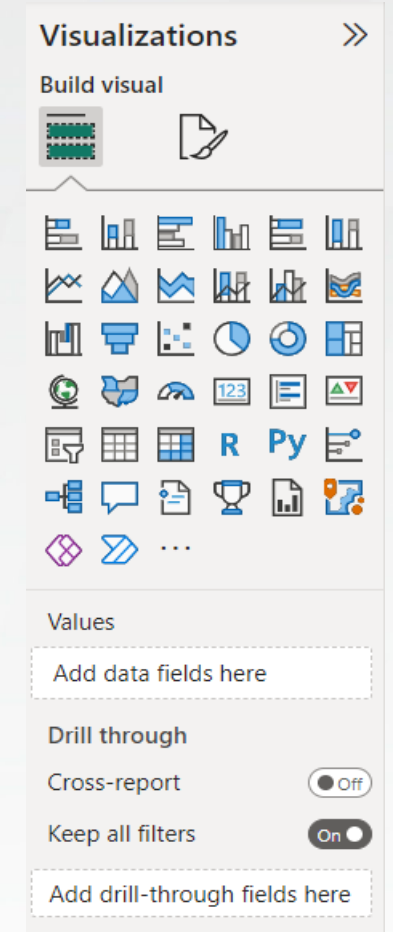
- Fields section
 - Displays the tables selected
 - Table & column names can be renamed
 - Icons are used to visually tell you the type of field
 - Tables can be hidden



The screenshot shows the 'Fields' pane in Power BI Desktop. At the top, there is a search bar with a magnifying glass icon and the text 'Search'. Below the search bar is a list of fields, each with a checkbox and an icon. The fields are: entitycorr, entry no, haslid, interco parent, level one approval comment, level two approval comment, line details, minority parent, monthly amount (with a sum icon), other amount (with a sum icon), period, rowcomment, ruleid (with a sum icon), scenario, source, source system, transactiondate (with a calendar icon), transactionid, tree (with a sum icon), trx date (with a calendar icon), updatedby, updatedon (with a calendar icon), and variance comments. The 'transactiondate', 'trx date', and 'updatedon' fields have a right-pointing chevron icon next to their checkboxes, indicating they are expandable.

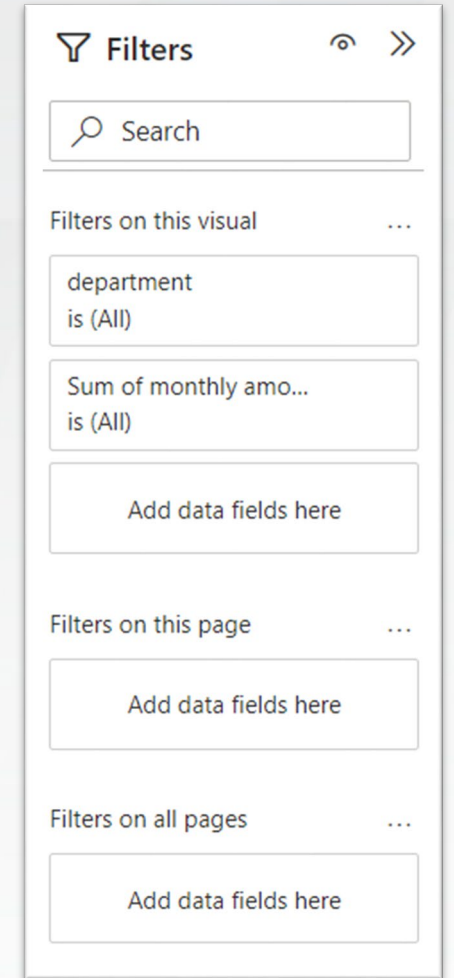
Power BI Desktop

- Visualizations
 - Display the available visualizations
 - More visualizations can be downloaded
 - Displays properties of a selected visualization
 - Options for formatting the visualization



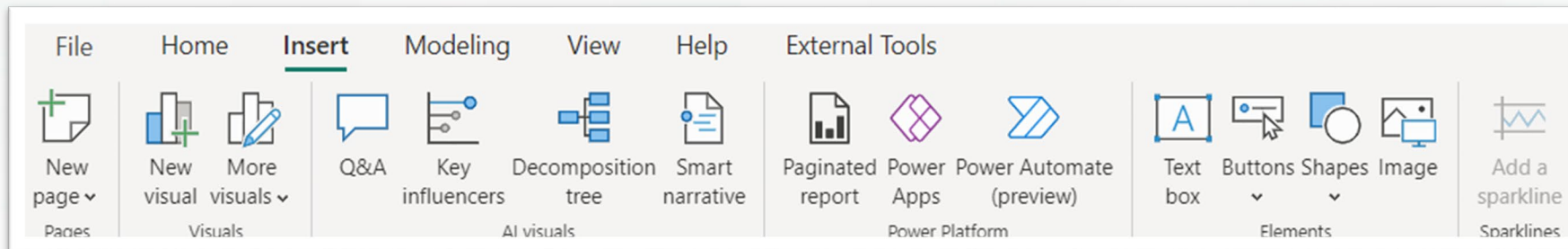
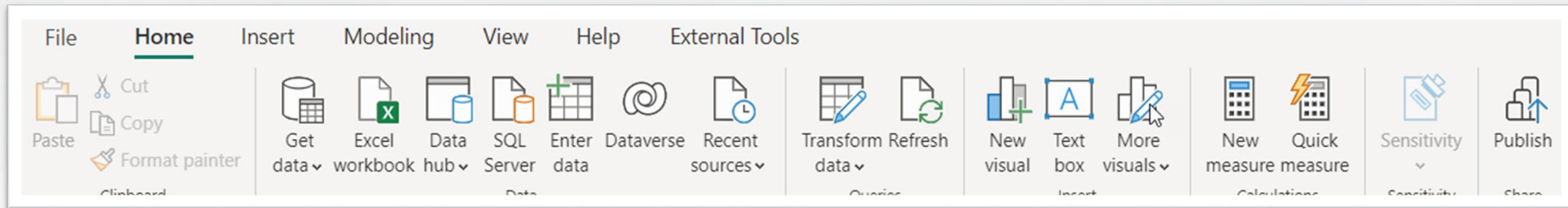
Power BI Desktop

- Filters
 - Used to apply filters to visualizations, a page, or all pages
 - Filters can be locked or hidden
 - Affect slicers
 - Can be basic or advanced



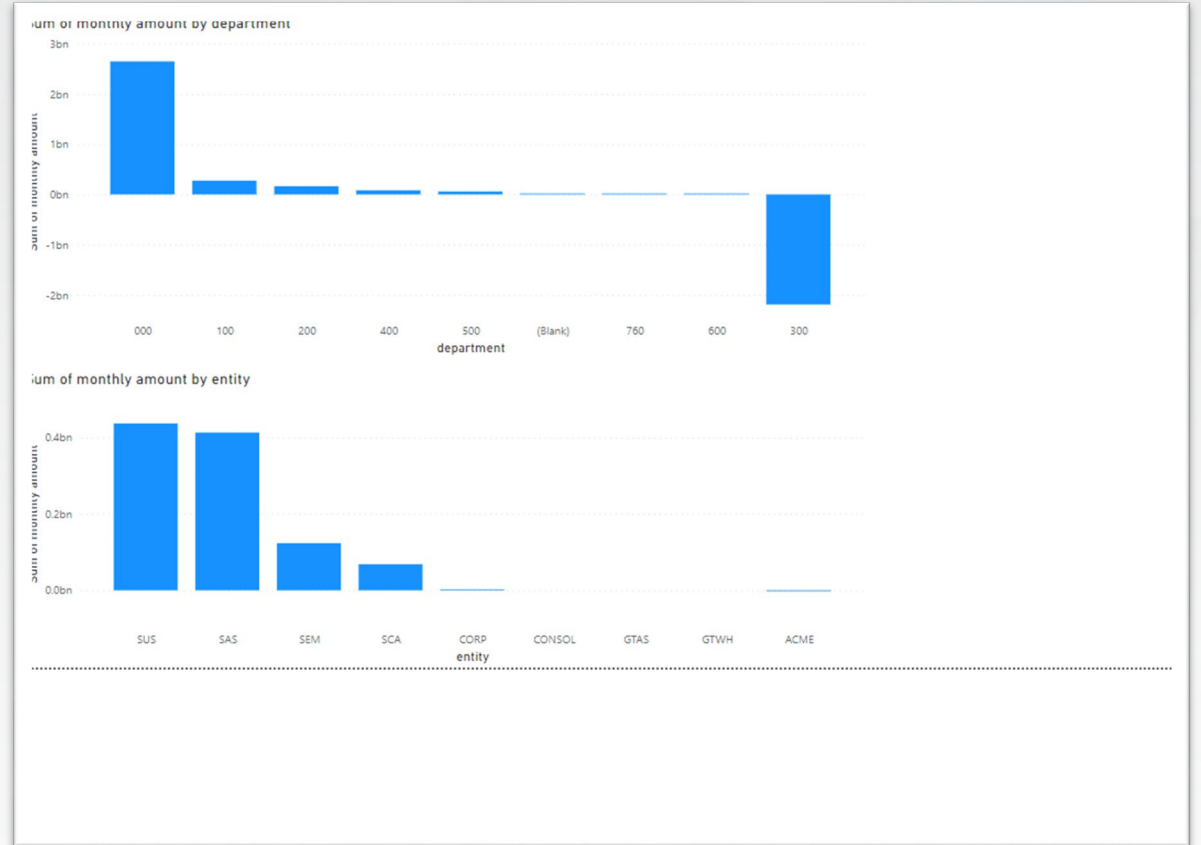
Power BI Desktop

- Ribbon
 - Multiple ribbons
 - Based on the menu item



Power BI Desktop

- Canvas
 - Used for displaying visualizations
 - Multiple pages can be used



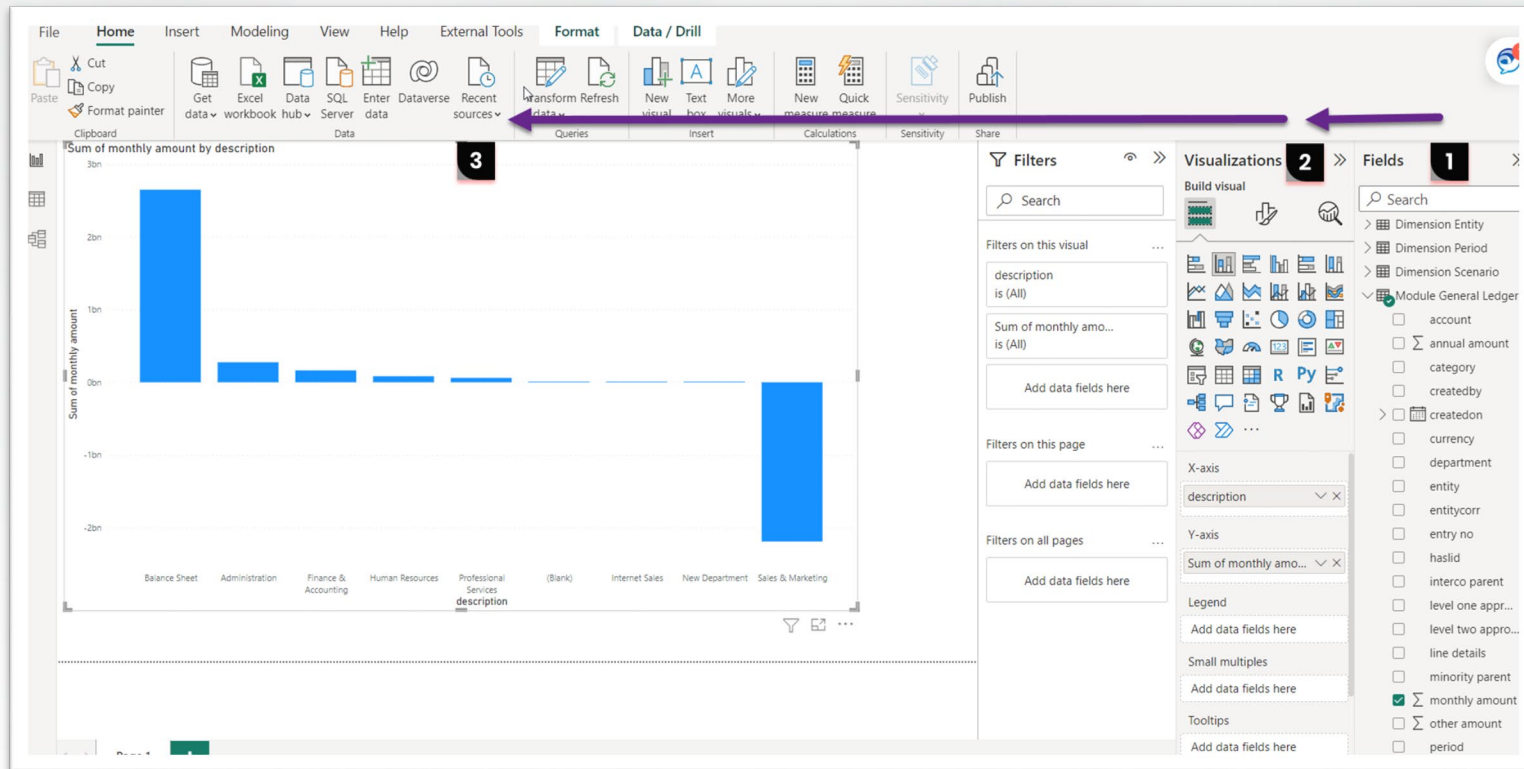
Creating Visualizations

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Getting Started – The Really Fast Way

- Select a visualization option
- Select one or more fields



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Selecting Fields

- Option 1
 - Select the type of visualization
 - Drag fields to the Visualizations area

The screenshot displays a software interface for configuring visualizations. It is divided into two main sections: 'Visualizations' on the left and 'Fields' on the right.

Visualizations Panel:

- Header: 'Visualizations' with a right-pointing arrow.
- Section: 'Build visual' containing three icons: a grid, a bar chart, and a magnifying glass.
- Main area: A grid of various visualization icons including bar charts, line graphs, pie charts, and maps.
- Legend: A section with a dashed border and the text 'Add data fields here'.
- Values: A section with a dashed border and the text 'Add data fields here'.
- Details: A section with a dashed border and the text 'Add data fields here'.
- Tooltips: A section with a dashed border and the text 'Add data fields here'.
- Drill through: A section with a dashed border and the text 'Add data fields here'.
- Cross-report: A toggle switch currently set to 'Off'.
- Keep all filters: A toggle switch currently set to 'On'.

Fields Panel:

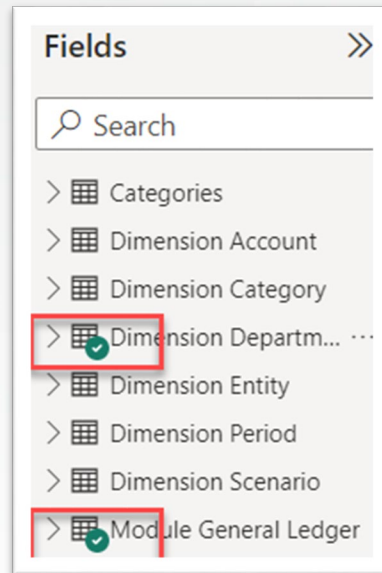
- Header: 'Fields' with a right-pointing arrow.
- Search: A search bar with a magnifying glass icon and the text 'Search'.
- Field List: A list of fields with checkboxes and expandable arrows (chevrons) to the left of each item:
 - > Dimension Entity
 - > Dimension Period
 - > Dimension Scenario
 - ✓ Module General Ledger
 - account
 - Σ annual amount
 - category
 - createdby
 - > createdon
 - currency
 - department
 - entity
 - entitycorr
 - entry no
 - haslid
 - interco parent
 - level one appr...
 - level two appro...
 - line details
 - minority parent
 - Σ monthly amount
 - Σ other amount
 - period

Selecting Fields

- Option 2
 - Select the visualization
 - Select fields or drag them to the visualization

More About Selecting Fields

- Power BI understands field types
- Power BI will try to measure numeric fields
- Once a field is selected, the table will display a checkmark



Filtering Data

- Drag fields to the filter pane
- Three types of filters
 - Visual
 - Page
 - All pages

Filtering Data

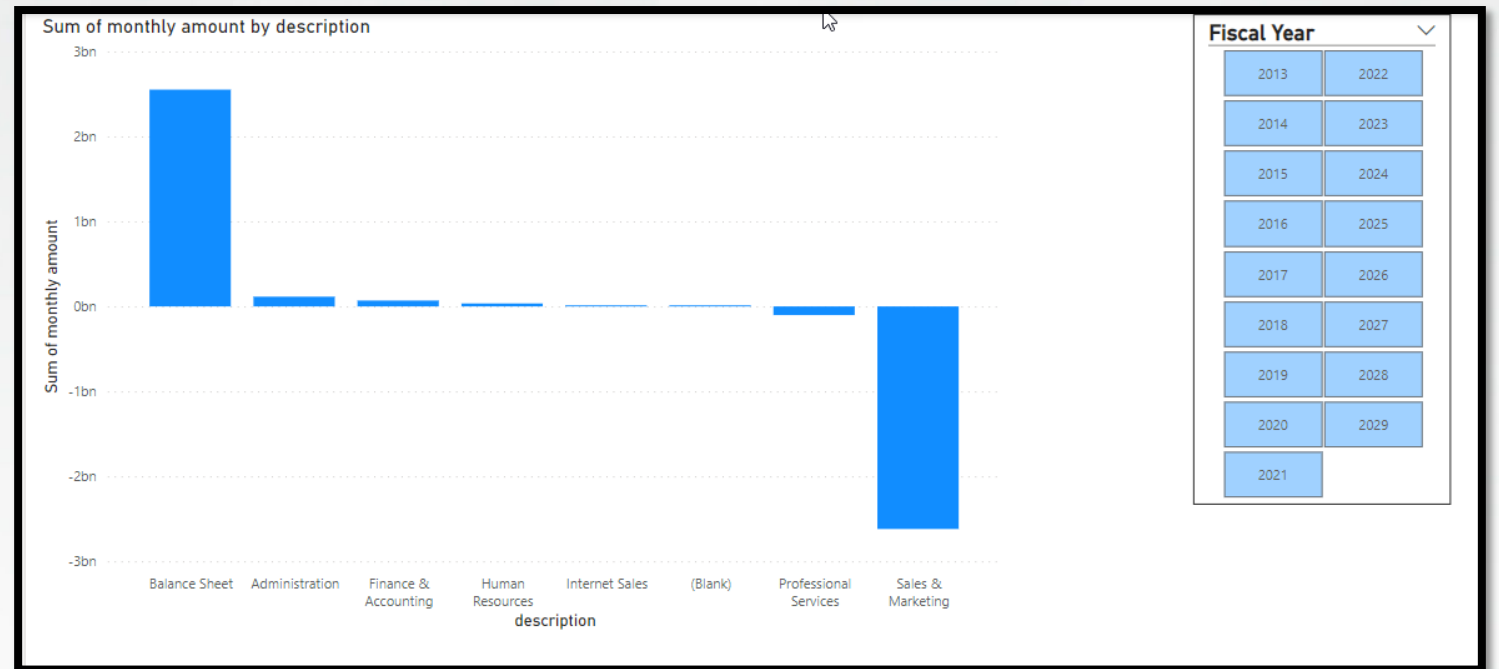
- Basic filters – select the values to display
- Advanced filters – use conditions
- Top N – Top 5, Top 10, etc.

The screenshot shows a filter pane titled "Filters" with a search bar. Below the search bar, it displays "Filters on this visual" with a list of filters. The first filter is "description is (All)". The second filter is "scenario is ACT". The filter type is set to "Basic filtering". Below the filter type, there is a search bar and a list of values: "Select all", "ACT", "BACKUP", "BACKUP20200518", "BUD", "BUD15", and "EADJ". Each value has a checkbox and a count of 1. At the bottom, there is a checkbox for "Require single selection".

The screenshot shows a filter pane titled "Filters" with a search bar. Below the search bar, it displays "Filters on this visual" with a list of filters. The first filter is "description is (All)". The second filter is "scenario is ACT". The filter type is set to "Advanced filtering". Below the filter type, there is a search bar and a dropdown menu for "Show items when the value" set to "is". Below that, there is a text input field containing "ACT". At the bottom, there are radio buttons for "And" and "Or", and an "Apply filter" button.

Slicers

- Alternative to using filters
- Displayed on the report page
- Can work with filters



**Show
Me!**



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Interacting with Visualizations

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Interaction Options

- Select slicer values
- Select an item in a visual
- Double-click for Q&A
- View as table
- Drill-through

A DAX Teaser

- DAX – Data Analysis Expressions
- Language for creating measures
- Similar to Excel functions

The screenshot displays the DAX editor interface with the following configuration:

- Name:** Revenue Amount
- Home table:** Module General Le...
- Format:** General
- Format options:** \$, %, , -00, Auto
- Data category:** Uncategorized
- Calculations:** New measure, Quick measure

The DAX formula is shown in the editor:

```
1 Revenue Amount =  
2 CALCULATE(  
3     SUM('Module General Ledger'[monthly amount]),  
4     'Dimension Account'[rollup level 1] IN { "R1. Revenue" }  
5 )
```


**Show
Me!**



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Resources

- Solver Academy (3 Power BI Courses)
- Microsoft Learn for Power BI
- Guy in a Cube series on YouTube
- SQLBI on YouTube
- Leila Gharani on YouTube

What's Next?

Solver Power BI Series Episode 3: Measuring Data

March 16, 2023

9 a.m. (CT)



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