

Preferred Strategies Power BI Report Navigation Guide

Getting Started

This guide will help you get acquainted with interacting with reports and visualizations produced and shared by Microsoft Power BI. It is not intended to teach users about how to use the Power BI application for individual analysis. Report examples published on Preferred Strategies website can be viewed in interacted with. For report development and modification capabilities sign up for a Free Power BI / QuickLaunch trial.

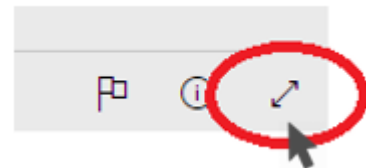
Basic Concepts

Power BI Reports

Power BI reports are used to visualize, analyze, and tell a story about your organizations data. The report you are viewing was created and published to the web using the Power BI cloud application. Within a report, users can filter by selecting sections of a visual, drill into visuals, analyze multiple “pages” of visuals, expand visuals to focus mode (full screen view), see the underlying data and more.

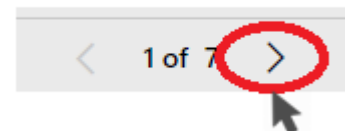
Expand reports full screen

To expand the report to a full screen window from the web page click on the expansion arrow icon seen here.



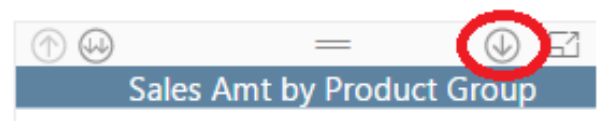
Navigate report pages

To navigate the different pages with the report, click on the navigation arrows in the bottom middle of the report.

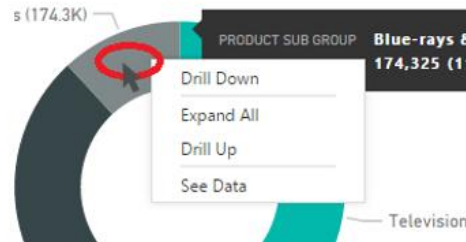


Drill into report visualizations

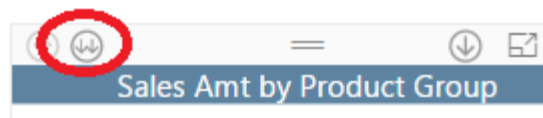
To drill into a visual turn on the drill feature by clicking on the down arrow icon in the top right of the visual as seen in the image to the right.



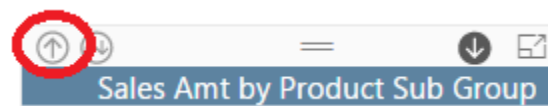
Alternatively, you can **right-click** on the section of the visual you want to drill into and select the Drill Down option in the pop-up menu.



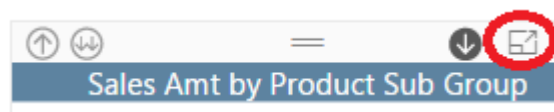
To drill on all elements of the visual instead of one specific element, click on the double down arrow icon in the top left of the visual. Also, you can click on the Expand All option in the right click pop up menu.



To drill back up you can click on the up arrow in the top left of the visual or perform the same right click function documented earlier and select Drill Up in the pop up menu.

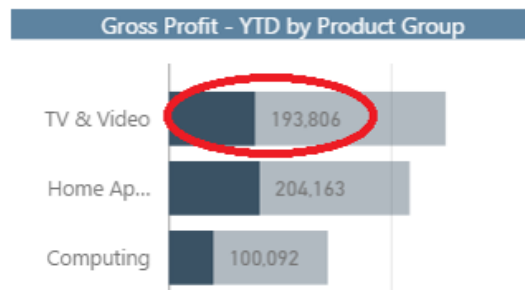


You can enter Focus Mode by selecting the screen icon in the top right of the visual which enlarges the visual into full screen mode.



Filter data in visuals

To filter data and “slice and dice” the report, **left-click** a section of a visual, such as “Central”, to see the highlighted segment of the data selected. Notice the other visuals on the page of the report are filtered to represent the element selected i.e. “Central”.

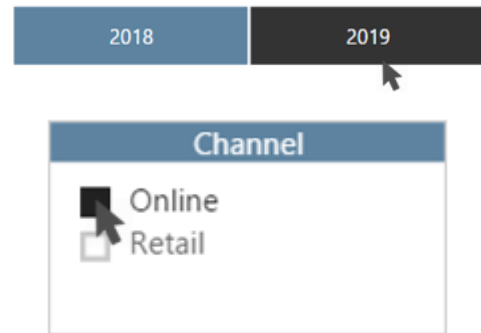


Filter data with Slicers

Slicers are dynamic selectors that control the filtering and calculations of data within the report. You can select one or more slicers at a time to easily segment your data set into smaller parts until the appropriate level of detail for analysis is reached. Slicing and dicing provides a closer view of your data to get deeper insights and present the report visuals in a new and engaging way. Examples of slicers in this report include year and period at the top and dimension filters on the left such as Region, Product, etc.

Slicers have been placed at the top of the report i.e. Year and Period or on the left side of the report i.e. Channel, Product Group, etc. Users can filter or “slice” the data in two ways. To filter on a slicer, select the block selector elements in the top of the report.

The report can also be filtered further by using the multi-select checkbox style “slicers” on the left of the report. To select multiple options hold the CLTR or Command - C for mac while clicking.



Glossary of Terms

Visualizations provide a graphical representation of data within the data model that make it easier for end-users to interpret information and drive more effective and efficient decision making.

Drill-down features allow users to navigate deeper into the hierarchy of information from a higher level to a more focused grain to analyze the data further.

Measures are amounts and unit's fields that can be included and aggregated to help answer business related questions. Some examples of measure objects included in Gross Profit – YTD, Revenue – MTD, etc.

Dimensions are fields used to organize or categorize information. For example, you may want to analyze an Amount by a specific category or dimension. Some examples of dimension objects are "Business Unit", "Object Account", or "Fiscal Year".

Acronyms

YTD - Year to Date: Activity from beginning of year through specified Calendar date

MTD - Activity from beginning of period through specified Calendar date

QTD - Activity from beginning of quarter through specified Calendar date

PY – Prior Year activity