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CARDS & FILTERS TEACHING NOTES - HOW TO CREATE IN POWER BI

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ALL 8 CARD & FILTER TYPES WITH CREATION & FORMATTING

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CARD TYPE 1: NUMBER CARD - HOW TO CREATE IN POWER BI

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HOW TO LOAD DATA:

Step 1: Open Power BI Desktop
Step 2: Click "Get Data" > Excel
Step 3: Select Excel file with data
Step 4: Select worksheet "Card1_NumberCard"
Step 5: Click "Load"

Result: Data ready in Power BI

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HOW TO CREATE NUMBER CARD:

Step 1: Go to "Report" view
Step 2: Click Visualizations panel > Card (looks like single number box)
Step 3: Empty card appears on canvas
Step 4: Drag "Total_Sales" to Values area
Step 5: Number appears in card (example: 450000)

Result: Number Card created ✓

Card shows: Single large number (total sales)

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FORMATTING OPTION 1: ADD CARD TITLE

What it does: Label your card

Steps:
1. Select the card
2. Click paint roller icon (Format pane)
3. General section > Title toggle ON
4. Type: "Total Sales"
5. Font Size: 14pt
6. Font Color: Black

Result: Title appears above number ✓

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FORMATTING OPTION 2 : CARD VALUES

What it does: Format the number display

Steps:
1. Format pane > Data Label section
2. Display Units: "Thousands" (shows 450K not 450000)
3. Decimal Places: 0
4. Font Size: 40pt (large, prominent)

Result: Number shows as 450K in large font ✓

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SUMMARY - NUMBER CARD COMPLETE

Card Created: ✓
5 Formatting Options Applied: ✓
Card Ready: ✓

Your Number Card shows:

- Total Sales: 450K (or your metric)
- Professional title
- Colored background
- Clear border
- Large, readable number

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END OF NUMBER CARD

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CARD TYPE 2: TEXT CARD - HOW TO CREATE IN POWER BI

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METHOD 1: TEXT CARD WITH DATA

Alternative method using data:

Step 1: Use Card visualization
Step 2: Drag "Customer_Name" to Values
Step 3: Results: Customer name displayed
Step 4: Looks like text card but uses data

Step 2: Format like Number Card (5 formatting options above)

Result: Text Card with real data ✓

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SUMMARY - TEXT CARD COMPLETE

Card Created: ✓
5 Formatting Options Applied: ✓
Card Ready: ✓

Your Text Card shows:

- Text information clearly
- Professional styling
- Colored background
- Clear border
- Centered alignment

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END OF TEXT CARD

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CARD TYPE 3: DATE CARD - HOW TO CREATE IN POWER BI

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HOW TO LOAD DATA:

Step 1: Open Power BI Desktop
Step 2: Click "Get Data" > Excel
Step 3: Select Excel file with data
Step 4: Select worksheet "Card3_DateCard"
Step 5: Click "Load"

Result: Data ready in Power BI

HOW TO CREATE DATE CARD:

Step 1: Go to "Report" view
Step 2: Click Visualizations panel > Card
Step 3: Empty card appears
Step 4: Drag "Order_Date" to Values area
Step 5: Date appears in card (example: 2024-01-15)

Result: Date Card created ✓

Card shows: Single date value

FORMATTING OPTION 1: TITLE

What it does: Label the date

Steps:

1. Select the card
2. Click paint roller icon
3. General section > Title toggle ON
4. Type: "Latest Order Date"
5. Font Size: 14pt

Result: Title appears above date ✓

FORMATTING OPTION 2: DATE FORMAT

What it does: Display date in readable format

Steps:

1. Format pane > Data Label section
2. Format: Choose style
 - Option 1: 15-Jan-2024
 - Option 2: 1/15/2024
 - Option 3: January 15, 2024
3. Font Size: 32pt

Result: Date shows in chosen format ✓

END OF DATE CARD

CARD TYPE 4: MULTI-ROW CARD - HOW TO CREATE IN POWER BI

HOW TO LOAD DATA:

Step 1: Open Power BI Desktop
Step 2: Click "Get Data" > Excel
Step 3: Select Excel file with data
Step 4: Select worksheet "Card4_MultiRowCard"
Step 5: Click "Load"

Result: Data ready in Power BI

HOW TO CREATE MULTI-ROW CARD:

Step 1: Go to "Report" view
Step 2: Click Visualizations panel > Multi-row Card
Step 3: Empty multi-row card appears
Step 4: Drag "Customer_ID" to Fields area
Step 5: Drag "Customer_Name" to Fields area
Step 6: Drag "Email" to Fields area
Step 7: Multiple rows of data appear

Result: Multi-Row Card created ✓

Card shows: Multiple rows (like a list)

Example:

Customer ID: C001
Customer Name: John Smith
Email: john@email.com

FORMATTING OPTION 1: CARD TITLE

What it does: Label the multi-row card

Steps:

1. Select the card
2. Click paint roller icon
3. General section > Title toggle ON
4. Type: "Customer Information"
5. Font Size: 14pt

Result: Title appears above card ✓

FORMATTING OPTION 2: VALUE FORMATTING

What it does: Style field values

Steps:

1. Format pane > Values section
2. Value Font Size: 12pt
3. Value Font Color: Black
4. Bold: No

Result: Values readable and clear ✓

END OF MULTI-ROW CARD

FILTER TYPE 5: FILTER ON VISUAL - HOW TO CREATE IN POWER BI

HOW TO LOAD DATA:

Step 1: Open Power BI Desktop
Step 2: Click "Get Data" > Excel
Step 3: Select Excel file with data
Step 4: Select worksheet "Filter1_VisualLevel"
Step 5: Click "Load"

Result: Data ready in Power BI

HOW TO CREATE FILTER ON VISUAL:

Step 1: Create a chart (example: Bar Chart)

- a) Click Visualizations > Bar Chart
- b) Add data to chart
- c) Chart appears

Step 2: Add Filter (Visual-level)

- a) Right-click on chart
- b) Select "Filter on this visual"
- OR
- c) Use Filters pane on right side
- d) Select field to filter: "Region"

Step 3: Filter appears for that chart only

- a) Filter shows: North, South, East, West
- b) Uncheck "South" to hide South region data
- c) Chart updates - only shows North, East, West
- d) Other charts unaffected!

Result: Visual-level filter working ✓

Filter affects: ONLY this one chart/card

FORMATTING OPTION 1: FILTER TYPE

What it does: Choose how filter looks

Steps:

1. Click Filters pane
2. Click "Region" field
3. Filter Type dropdown
 - Option 1: Basic Filtering (list)
 - Option 2: Advanced Filtering (conditions)
 - Option 3: Top N (show top 3 regions)

Step 2: Select "Basic Filtering"

Result: Simple list of filter options ✓

SUMMARY - FILTER ON VISUAL COMPLETE

Your Visual-Level Filter:

- Affects only this chart
- Filter options for Region
- Easy to use
- Professional appearance
- Other charts unaffected

KEY POINT: Visual-level filter only affects the selected chart/card

END OF FILTER ON VISUAL

FILTER TYPE 6: FILTER ON PAGE - HOW TO CREATE IN POWER BI

HOW TO LOAD DATA:

- Step 1: Open Power BI Desktop
- Step 2: Click "Get Data" > Excel
- Step 3: Select Excel file with data
- Step 4: Select worksheet "Filter2_PageLevel"

Step 5: Click "Load"

Result: Data ready in Power BI

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HOW TO CREATE FILTER ON PAGE:

Step 1: Create multiple charts on same page

- a) Create Bar Chart
- b) Create Line Chart
- c) Both on same page

Step 2: Add Page-level Filter

- a) Go to Filters pane (right side)
- b) Drag "Region" field
- c) To "Filters on this page" section (NOT "Filters on this visual")

Step 3: Filter appears at page level

- a) Filter shows: North, South, East, West
- b) Uncheck "South"
- c) BOTH charts update!
- d) All charts on page filtered

Result: Page-level filter working ✓

Filter affects: ALL charts/cards on this page

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FORMATTING OPTION 1: FILTER TYPE

What it does: Choose filter display

Steps:

1. Filters pane > Region field (page-level)
2. Filter Type dropdown
 - Option 1: Basic Filtering (list)
 - Option 2: Advanced Filtering
 - Option 3: Top N

Result: Choose appropriate type ✓

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SUMMARY - FILTER ON PAGE COMPLETE

Filter Created: ✓

5 Formatting Options Applied: ✓

Filter Working: ✓

Your Page-Level Filter:

- Affects ALL charts on page
- Filter options for Region
- Professional appearance
- Positioned clearly
- Easy to use

KEY POINT: Page-level filter affects ALL charts/cards on the current page

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END OF FILTER ON PAGE

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FILTER TYPE 7: FILTER ON ALL PAGES - HOW TO CREATE IN POWER BI

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HOW TO LOAD DATA:

- Step 1: Open Power BI Desktop
- Step 2: Click "Get Data" > Excel
- Step 3: Select Excel file with data
- Step 4: Select worksheet "Filter3_AllPages"
- Step 5: Click "Load"

Result: Data ready in Power BI

HOW TO CREATE FILTER ON ALL PAGES:

PREREQUISITE: Report must have 2+ pages

Creating multiple pages:

- a) Right-click page tab at bottom
- b) Select "New page"
- c) Create Page 2
- d) Create another page if needed

Result: Now have Page 1, Page 2, Page 3, etc.

Step 2: Add All-Pages Filter

- a) Go to Filters pane
- b) Drag "Region" field
- c) To "Filters on all pages" section (bottom section)

Step 3: Filter appears for entire report

- a) Filter shows: North, South, East, West
- b) Uncheck "South"
- c) ALL pages in report are filtered!
- d) Switch between pages - filter stays applied

Result: Report-level filter working ✓

Filter affects: ALL pages in entire report

FORMATTING OPTION 1: FILTER TYPE

What it does: Choose display style

Steps:

1. Filters pane > Region field (all pages section)
2. Filter Type:
 - Basic Filtering (recommended)
 - Advanced Filtering
 - Top N filtering
3. Choose "Basic Filtering"

Result: Simple, user-friendly filter ✓

SUMMARY - FILTER ON ALL PAGES COMPLETE

Filter Created: ✓

5 Formatting Options Applied: ✓

Filter Working: ✓

Your Report-Level Filter:

- Affects ALL pages
- Consistent across report
- Professional appearance
- Easy to use

- Remembers selection

KEY POINT: All-pages filter affects every page and chart in entire report

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END OF FILTER ON ALL PAGES

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