USER GROUP DEVON & CORNWELL

Live comments PBI

ALEX BADIU
01 OCT 24

If one does not know to which port one is sailing, no winds is favorable. Seneca

ALEX BADIU
LEAD ANALYTICS POLE, DECILIA

Use Case

Subject: Request for Live Commenting in Power BI

Hi Alex,

I've been hearing from the commercial teams that they are **spending too much time** on processes that require **data consolidation** and **adding comments manually**. Is there a way to implement **live commenting directly in Power BI** to streamline this?
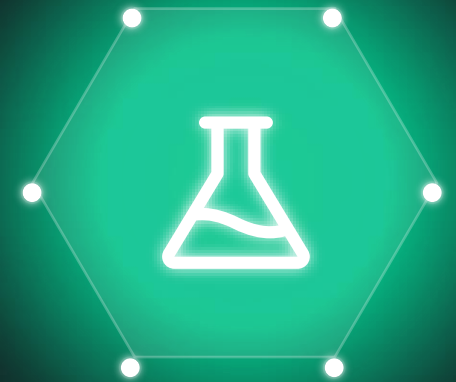Looking forward to your input.
Best regards,
Jane

Dear Jane,

Thank you for reaching out. Live commenting in Power BI is indeed possible through different approaches, though it is not a native feature. The implementation will depend on various parameters, such as the **specific requirements**, the **data sources involved, and how the comments need to be managed**.
Could we schedule a meeting to **discuss the details further**? This will help me better understand the requirements and determine the most suitable solution for your team.
Looking forward to your response.
Best regards,
Alex

Subject: Request for Live Commenting in Power BI

As a regional sales analyst, I spend a significant amount of time each month **during the closing period** extracting sales data for various KPIs from Hyperion into Excel. I then **distribute these figures to each country**, giving them a week to provide feedback. However, I often **receive the comments at the last minute, as the numbers can change**, causing delays. This repetitive process of extracting, emailing, receiving, and manually consolidating data leaves me with **very little time to thoroughly analyze the numbers**. Once everything is consolidated and verified, I need to provide my own commentary and create a PowerPoint presentation for the executive committee (COMEX).

The situation is becoming increasingly stressful as leaders frequently request detailed information about specific countries, and **I often feel unprepared**. Despite the growing demand for more in-depth analysis and insights, there is **no willingness to invest in a new tool**. Therefore, the solution must be addressed using Power BI and SharePoint lists to streamline the process and improve efficiency.

Use Case

Use Case

DATA SOURCE
TIME LOST

1

4

PARTICULARITY
STRESS

MODEL REFRESH
QUALITY OF WORK

2

3

SUCCESS FACTOR
SCALABILTIY

PERSONA 1 : COUNTRIES add comments for each KPI

COUNTRY

Controlled by RLS

◇ Industry Filter   ◇ Countries Filter

KPI1
context & vs LY $/%

Bold/color/font size

SAVE

KPI2
context & vs LY $/%

SAVE

KPI3
context & vs LY $/%

SAVE

KPI4
context & vs LY $/%

SAVE

PowerApps, based on Sharepoint, Edit/Read based on REGION persona

---

PERSONA 2 : REGION see comments for all countries, for each KPI

REGION

◇ Industry Filter   ◇ KPI Filter

PowerApps, based on Sharepoint, Read only

FRANCE
context & vs LY $/%

Bold/color/font size

POLAND
context & vs LY $/%

SWEDEN
context & vs LY $/%

UNITED STATES
context & vs LY $/%

↓↑

Regional comment pop up   Close/Open Process

If > 1 counry selected, "Region persona", otherwise "Country persona"

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

OVERVIEW - COMMENTS | COUNTRY

| France | Poland | Sweden | United States |

[✓] Building Supply Retail   [ ] Doctor's Offices and...   [ ] Legal Services   [ ] Service Retail

Opportunity Count
103

Revenue **$532,635**
Last year **82,345** +21% ↑

Format | B I U | ···

+21% vs last year — 🟢 **Positive growth** in opportunities, reflecting increased market interest or expansion efforts.

Save

Revenue Open
$ 92,110

Opportunities Open **14**
Last year **$68.9201M** -7.8% ↓

Format | B I U | ···

-7.8% vs last year — 🔴 **Decline in revenue**, market conditions affecting revenue generation.

Save

Revenue Won
$ 440,525

Opportunities Won **85**
Last year **$201,377,821** +68% ↑

Format | B I U | ···

Save

Revenue Lost
$ 90,107

Opportunities Lost **18**
Last year **$125,183,002** +23% ↑

Format | B I U | ···

Save
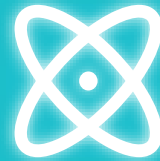
Conclusions

IDEAS
EXPAND IDEAS

1

IDEAS
THE IMPORTANCE OF DOCUMENTATION

4

IDEAS
THE IMPORTANCE OF ANTICIPATION

2

3

IDEAS
DEV CHALLENGES

Key Tips Recap

✓ **Start with a matrix in Power Bi**:
Validate the behavior before proceeding with anything else.

✓ **Publish PBI and edit from the web:**
Ensure you manage the app directly from the web.

✓ **Maintain consistency:**
Ensure alignment between Power BI, Power Apps, and your development strategy.
Protect your DAX measures by ensuring unique filters and force selection.

✓ **Test thoroughly:**
Always test your integration and rename your app for clarity.

✓ **Adjust display settings:**
Set the display to landscape and turn "Scale to fit" off.

✓ **Avoid unnecessary modifications after the integration:**
If changes are needed, make them through Power BI Service.

✓ **Documentation matters:**
Functional documentation and user stories are essential for successful development.

✓ **Utilize Power BI integration effectively:**
Choose the correct default mode (new or modify) based on your use case.

✓ **Add a RichTextEditor:**
This enables formatting options like bold, colors, and font changes inside Power BI comments.

✓ **Create intuitive Save buttons:**
• Make sure buttons are only activated when necessary.
• Visual feedback for app changes: Since changes in the app are not instant, change the fill color as a loading indicator for quicker visual feedback when in edit mode.

✓ **Empower users:**
Add features like a toggle to force read mode when the process is closed.

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LEAD ANALYTICS POLE, DECILIA

THANK YOU!

CONNECT WITH ME : **in** Alexandru Badiu | LinkedIn

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DAX AS DYNAMIC PARAMETER

➢ Start from a matrix in PBI, validate the behaviour before anything else
➢ Be mindful of your vulnerabilities (DAX)
➢ Publish and Save from the Web
➢ Test your integration in Power Apps
➢ Rename and save the app

"We recommend that you first publish your report to the Power BI service and then create or modify apps."
[Microsoft documentation](#)

2

2

MAKE THE SCREEN WIDER

➤ From settings change the Display Orientation to Landscape and disable "Scale to fit"
➤ Save and publish
➤ Note: Changes in Power BI are not immediately visible.

3

3

ADDING NEW FIELDS

➢ Add the new columns in Power Bi by selecting the checkboxes as you normally would.
➢ Hover over the PowerApp visual, click the three dots in the top right corner, and choose "Edit."
➢ This will open PowerApp Studio, allowing you to make changes to the app.

⚠ "If you change the data fields associated with the visual, **you must edit the app from within the Power BI service** by selecting the ellipsis (…) and then selecting Edit. Otherwise, the changes won't be propagated to Power Apps, and the app will behave in unexpected ways."
[Microsoft documentation](#)

4

4

BU PERSONA

CREATE 4 EDIT FORMS AND LEVERAGE POWER BI INTEGRATION

Default Mode

```
                                        powerapps
If(
    First(
        Filter(
            CommentsBU_Demo,
            Title = "Demo Comment"
            && KPI = "Opportunity Count"
            && Industry = First(PowerBIIntegration.Data).'_02 Selected Industry'
&& Country = First(PowerBIIntegration.Data).'_03 Selected Country'
        )
    ).KPI = Blank(),

    FormMode.New,

    FormMode.Edit

)
```

This approach is common in scenarios where you want to **ensure that users are either creating a new record under specific conditions or editing an existing one**. It ensures that the form behaves intelligently based on the context provided by the Power BI data integration, improving both user experience and data integrity.

Item

```
                                        powerapps
First(
    Filter(
        CommentsBU_Demo,
        Title = "Demo Comment"
        && KPI = "Opportunity Count"
        && Industry = First(PowerBIIntegration.Data).'_02 Selected Industry'
        && Country = First(PowerBIIntegration.Data).'_03 Selected Country'
    )
)
```

It is designed to ensure that the data coming from Power BI inside the form (through PowerBIIntegration.Data) is used as **part of the filtering criteria for selecting the right comment.**

Visible

```
                                        powerapps
First( PowerBIIntegration.Data ).'_01 Level Test' = "BU"
```

This can be used in conditions or logic within Power Apps to **control the app's behavior based on the data received from Power BI**. If the value is "BU," the corresponding logic will be triggered. This allows for the creation of two distinct views for different personas within a single screen.

All columns, except for the comments, are either hardcoded or dynamically determined by the values passed from Power BI via PowerBIIntegration.Data

Button SAVE

Tip10: DisplayMode for buttons

```
                                                          powerapps
**btn_Save_Opcount:**

    Control: Classic/Button
    Properties:
      OnSelect: '=SubmitForm(OpCount_form); '
      Text: ="Save"
      BorderThickness: =1
      DisplayMode: =
      If( OpCount_form.Unsaved, DisplayMode.Edit, DisplayMode.Disabled )
      Fill: =Color.Black
      Height: =58
      RadiusBottomLeft: =5
      RadiusBottomRight: =5
      RadiusTopLeft: =5
      RadiusTopRight: =5
      Size: =20
      Visible: =First( PowerBIIntegration.Data ).'_01 Level Test' = "BU"
      Width: =195
      X: =App.Width — Self.Width —20
      Y: =75
```

If the form has unsaved data (meaning the user made changes but hasn't saved them yet), the button will be in **DisplayMode.Edit**, which means it **will be active and clickable**.

If there are no unsaved changes, the button will be in **DisplayMode.Disabled**, meaning it will be grayed out and not clickable.

The button's placement, design, and behavior are carefully controlled to ensure that **only users with the correct level** (likely business unit-level users) **can see and interact** with it, enhancing the precision and control of the app's functionality.

4

REGION PERSONA

Gallery & Forms for Region comments

Pop-Up

We don't want to modify the country's comment; instead, we aim to add a regional comment using a pop-up experience (which makes sense from a design perspective in Power BI).

For the button, expand the OnSelect action to launch the variable.

```
                                                            powerapps
 Set(
     SeeInputZone,
     true
 );
 Set(
     AddY,
     600
 )
```

Form Visibility same structure and logic. For visible:

```
                                                            powerapps
 First( PowerBIIntegration.Data ).'_01 Level Test' <> "BU" && SeeInputZone
```

Toggle

Tip12:
On Select

```
                                                            powerapps
 // I am adding the desired value to the Comments Status when a change is made
 Patch(
     CommentsStatus,
     LookUp(CommentsStatus, Title = "LiveComments"),
     { CommentStatus: Toggle_ProcessStatus.Value }
 );

 // If the process is active, I want the variable to be in edit mode.
 If( Toggle_ProcessStatus.Value, UpdateContext( { BlockChange:DisplayMode.Edit } ));
```

Default

```
                                                            powerapps
 First(CommentsStatus).CommentStatus
```

Tip13:

Rectangle block == set the process for the BU countries to Read-only, disabling further editing.

Visibility

```
                                                            powerapps
 !First(CommentsStatus).CommentStatus
```