

Understanding Filtering in Power BI

with Amanda Lahrman

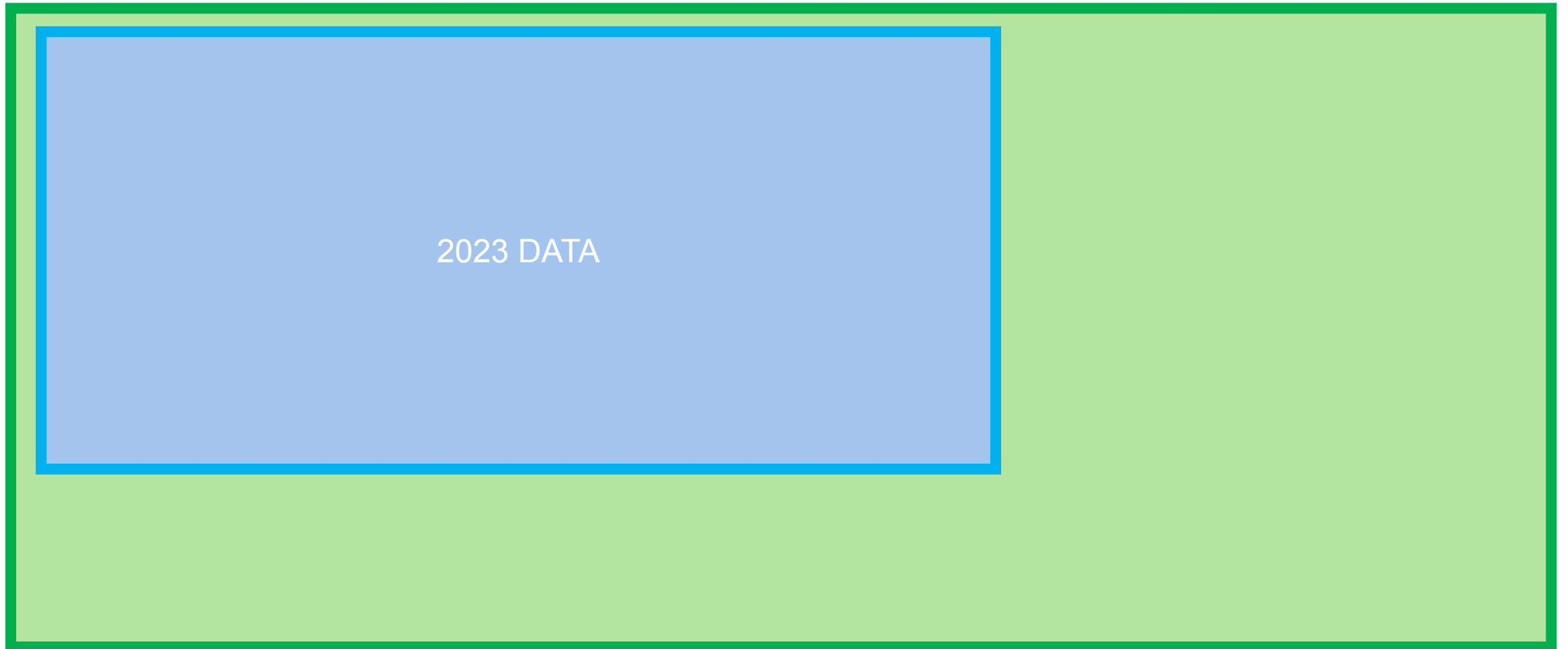
To understand how to use
slicers in Power BI, we must
understand how filtering a
data set works

All Data

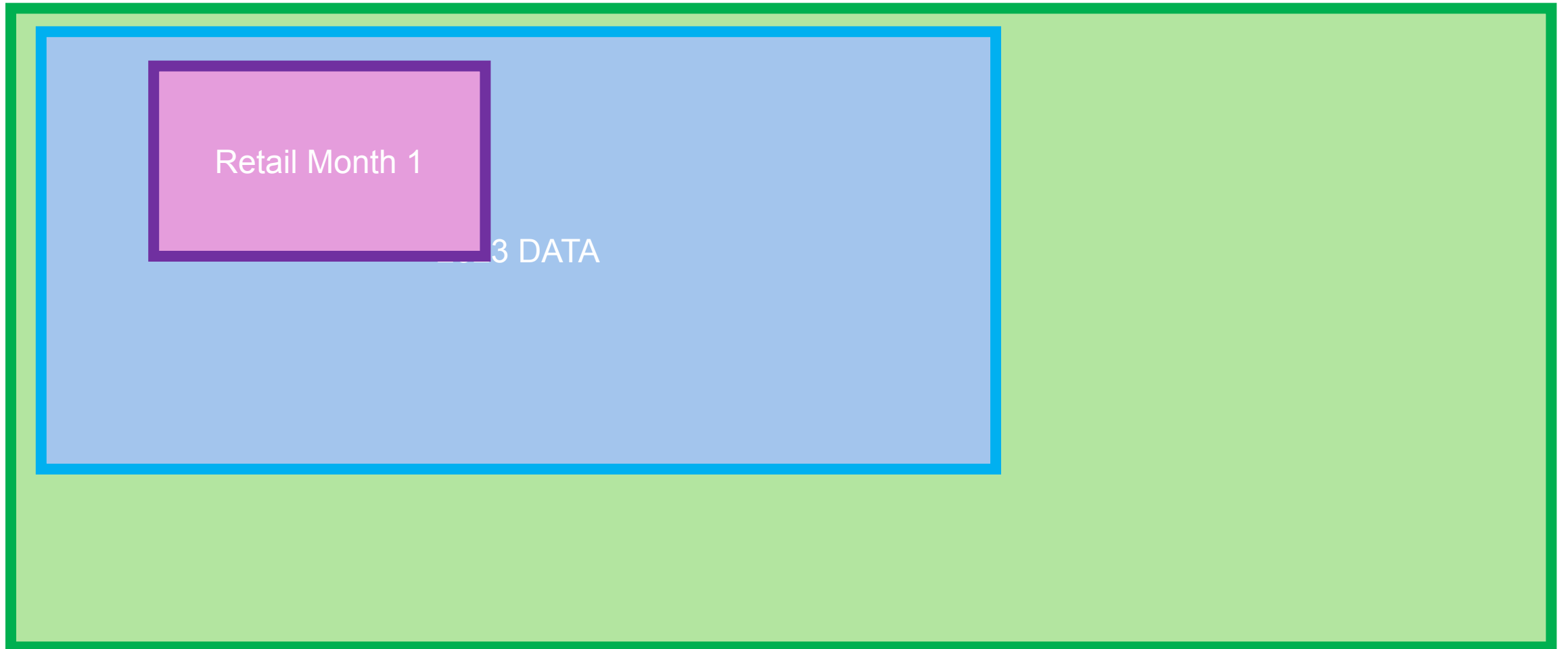


All Data

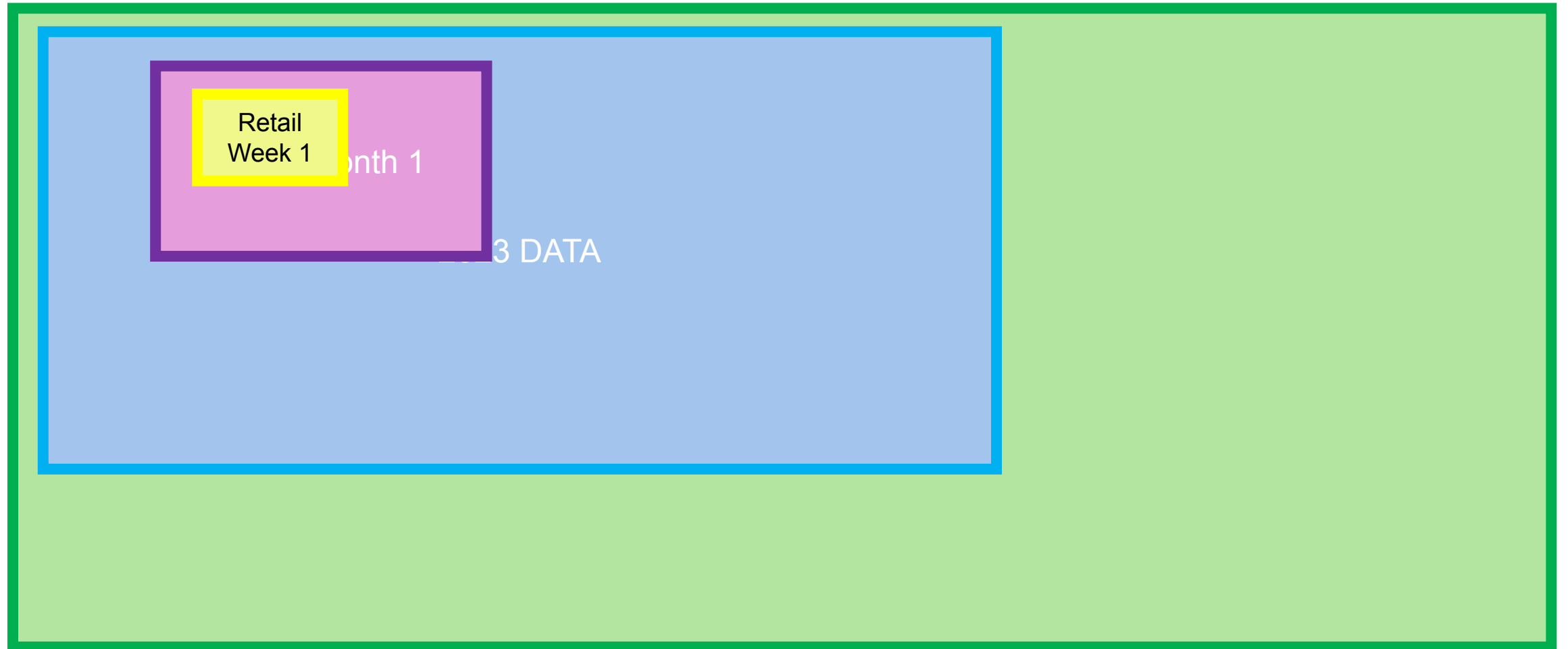
Data from 2023 Only



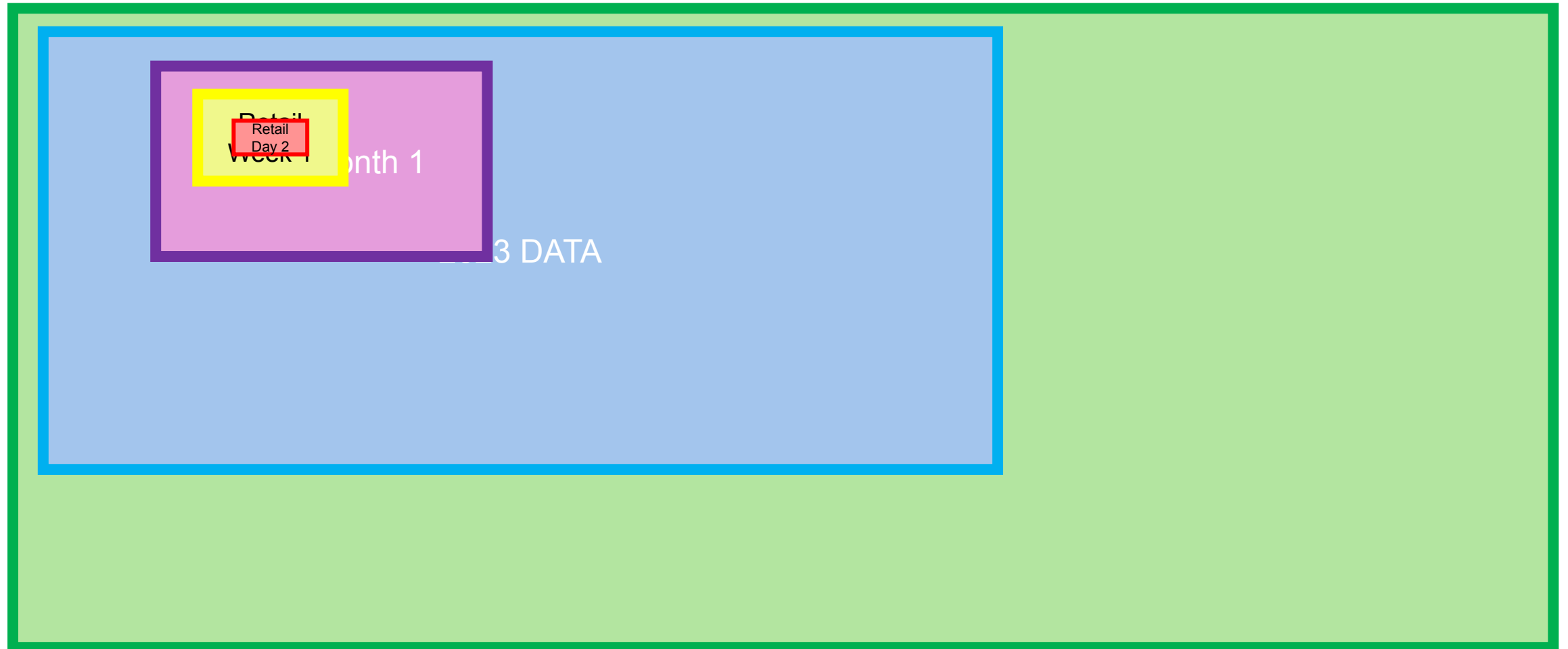
Data from Retail Month 1, from 2023



Data from Retail Week 1, from Retail Month 1, from 2023



Data from Retail Day 2, from Retail Week 1, from Retail Month 1, from 2023



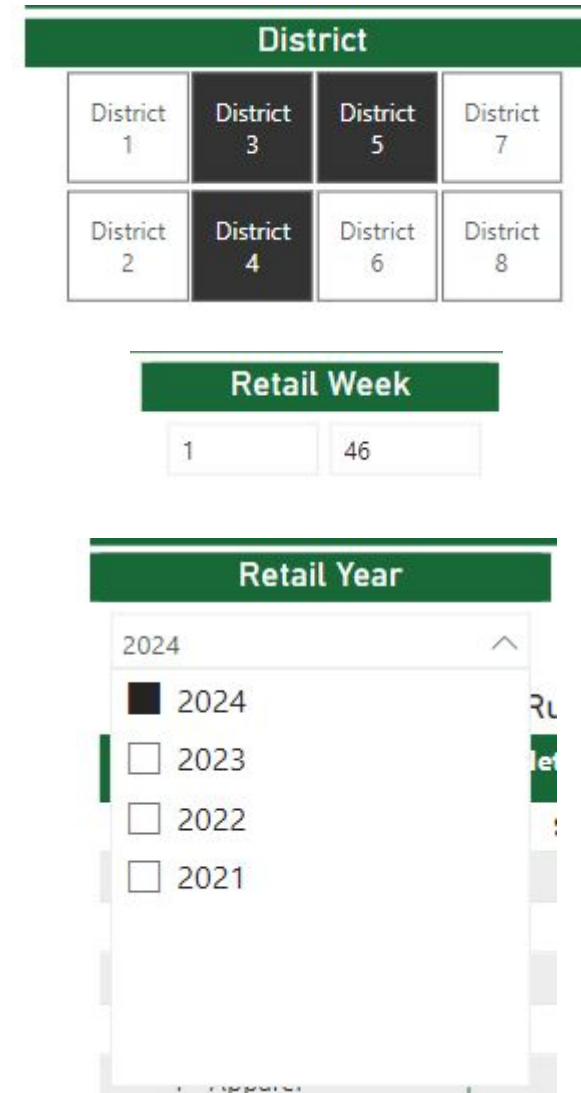
Main Takeaway

- The lower the level, the more the data will filter out
 - Year > Month
 - Month > Week
 - Week > Day

There are many ways to filter data in Power BI, here are two common ways

Slicers

- Power BI's term for a visual that allows filtering on a report page
- Different kinds of slicers
 - Tiled
 - For shorter category lists
 - Between
 - Usually with Dates
 - Drop Downs
 - For long category lists (i.e. Store)
 - Can include a search bar
- Ctrl + Click to select multiple
- Type varies depending on space within the page and type of data being filtered on



Selecting and Highlighting

- Selecting a row will:
 - Highlight the row visually
 - Grey out other information within the same table
 - Small black bar along the left side
 - Apply the same categories to other tables on the page (see next slide for example)

Running Total Net Sales Day					
Retail Day With Date	Net Sales	% Chng	Avg Store Sales	Avg % Chng	Mkdwn %
51 - 3/25/2024	\$463,627	-2.2%	\$5,151	-5.5%	11.2%
0 - Pallets	\$61	0.0%	\$15		21.0%
1 - Consumables	\$185,815	-1.9%	\$2,065	-5.2%	4.3%
2 - Home	\$62,223	-5.5%	\$691	-8.7%	17.3%
3 - Hardlines	\$60,125	7.4%	\$668	3.9%	15.1%
4 - Apparel	\$93,798	-5.0%	\$1,042	-8.2%	18.3%
5 - Furniture	\$16,423	-8.0%	\$213	-14.0%	6.0%
6 - Seasonal	\$45,182	-2.7%	\$502	-5.9%	8.2%
Total	\$463,627	-2.2%	\$5,151	-5.5%	11.2%

Selecting and Highlighting: Example

- “1- Consumables” row is highlighted in the Day table in the upper left
- WTD, MTD, and YTD will be filtered to show:
 - Category: 1-Consumables
 - Retail Day: 51 – 3/25/2024
- Highlighted Net Sales matches across all tables (\$185,815)

Running Total Net Sales Day

Retail Day With Date	Net Sales	% Chng	Avg Store Sales	Avg % Chng	Mkdwn %
51 - 3/25/2024	\$463,627	-2.2%	\$5,151	-5.5%	11.2%
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6 - Seasonal	\$45,182	-2.7%	\$502	-5.9%	8.2%
Total	\$463,627	-2.2%	\$5,151	-5.5%	11.2%

Running Total Net Sales WTD

Retail Week	Net Sales	% Chng	Avg Store Sales	Avg % Chng	Mkdwn %
8	\$185,815	-1.9%	\$2,065	-5.2%	4.3%
1 - Consumables	\$185,815	-1.9%	\$2,065	-5.2%	4.3%
Total	\$185,815	-1.9%	\$2,065	-5.2%	4.3%

Running Total Net Sales MTD

RetailMonth	Net Sales	% Chng	Avg Store Sales	Avg % Chng	Mkdwn %
2	\$185,815	-1.9%	\$2,065	-5.2%	4.3%
1 - Consumables	\$185,815	-1.9%	\$2,065	-5.2%	4.3%
Total	\$185,815	-1.9%	\$2,065	-5.2%	4.3%

Running Total Net Sales YTD

Retail Year	Net Sales	% Chng	Avg Store Sales	Avg % Chng	Mkdwn %
2024	\$185,815	-1.9%	\$2,065	-5.2%	4.3%
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Total	\$185,815	-1.9%	\$2,065	-5.2%	4.3%

Let's work through some
examples together

What do our slicers tell us?

Daily Flash Sales Report						Today's Date: 3/26/2024		Retail Month: 2		Retail Week: 8		Retail Day: 52	
Retail Year		Comp Status				District		Store Name					
2024		Comp		Non-Comp		All		All					
Running Total Net Sales Day						Running Total Net Sales WTD							
Retail Day With Date	Net Sales	% Chng	Avg Store Sales	Avg % Chng	Mkdwn %	Retail Week	Net Sales	% Chng	Avg Store Sales	Avg % Chng	Mkdwn %		
51 - 3/25/2024	\$463,627	-2.2%	\$5,151	-5.5%	11.2%	8	\$1,083,775	-0.9%	\$12,042	-4.2%	11.3%		
0 - Pallets	\$61	0.0%	\$15		21.0%	0 - Pallets	\$107	60.2%	\$12	-64.4%	35.8%		
1 - Consumables	\$185,815	-1.9%	\$2,065	-5.2%	4.3%	1 - Consumables	\$410,424	-2.8%	\$4,560	-6.0%	4.1%		
2 - Home	\$62,223	-5.5%	\$691	-8.7%	17.3%	2 - Home	\$152,937	4.6%	\$1,699	1.1%	17.6%		
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Total	\$463,627	-2.2%	\$5,151	-5.5%	11.2%	Total	\$1,083,775	-0.9%	\$12,042	-4.2%	11.3%		
Running Total Net Sales MTD						Running Total Net Sales YTD							
RetailMonth	Net Sales	% Chng	Avg Store Sales	Avg % Chng	Mkdwn %	Retail Year	Net Sales	% Chng	Avg Store Sales	Avg % Chng	Mkdwn %		
2	\$14,283,400	5.6%	\$158,704	2.0%	15.8%	2024	\$30,426,956	4.0%	\$334,362	-0.6%	14.5%		
0 - Pallets	\$845	-21.1%	\$34	-2.1%	50.9%	0 - Pallets	\$1,607	-31.4%	\$45	-10.5%	50.1%		
1 - Consumables	\$5,268,850	2.1%	\$58,543	-1.3%	4.2%	1 - Consumables	\$11,342,608	5.7%	\$124,644	1.0%	4.3%		
2 - Home	\$1,944,724	-0.4%	\$21,608	-3.8%	10.7%	2 - Home	\$4,023,712	-7.3%	\$44,217	-11.4%	7.0%		
3 - Hardlines	\$2,193,369	22.7%	\$24,371	18.6%	24.1%	3 - Hardlines	\$4,805,625	13.9%	\$52,809	8.9%	25.4%		
4 - Apparel	\$3,098,105	2.4%	\$34,423	-1.0%	31.2%	4 - Apparel	\$6,728,415	2.4%	\$73,939	-2.1%	27.2%		
5 - Furniture	\$401,571	-10.8%	\$4,462	-13.8%	6.4%	5 - Furniture	\$757,253	-17.6%	\$8,321	-21.2%	5.4%		
6 - Seasonal	\$1,375,935	19.6%	\$15,288	15.6%	5.2%	6 - Seasonal	\$2,767,736	11.6%	\$30,415	6.7%	4.5%		
Total	\$14,283,400	5.6%	\$158,704	2.0%	15.8%	Total	\$30,426,956	4.0%	\$334,362	-0.6%	14.5%		

What do our slicers tell us?

- Retail Year = 2024
- All Comp Statuses
- All Districts
- All Stores

Daily Flash Sales Report

Today's Date: 3/26/2024

Retail Month: 2

Retail Week: 8

Retail Day: 52

Retail Year

2024

Comp Status

Comp

Non-Comp

District

All

Store Name

All

Running Total Net Sales Day

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Retail Year

2024

Comp Status

Comp

Non-Comp

District

All

Store Name

All

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Total	\$30,426,956	4.0%	\$334,362	-0.6%	14.5%

What happens if this row is highlighted?

- WTD, MTD, YTD tables will filter:

- Division 5 - Furniture
- Retail Day 51 – 3/25/2024

YTD –

er:

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51 –

Retail Year

2024

Comp Status

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What happens if this row is highlighted?

Daily Flash Sales Report						Today's Date: 3/26/2024		Retail Month: 2		Retail Week: 8		Retail Day: 52	
Retail Year		Comp Status				District		Store Name					
2024		Comp		Non-Comp		All		All					
Running Total Net Sales Day						Running Total Net Sales WTD							
Retail Day With Date	Net Sales	% Chng	Avg Store Sales	Avg % Chng	Mkdwn %	Retail Week	Net Sales	% Chng	Avg Store Sales	Avg % Chng	Mkdwn %		
51 - 3/25/2024	\$463,627	-2.2%	\$5,151	-5.5%	11.2%	8	\$1,083,775	-0.9%	\$12,042	-4.2%	11.3%		
0 - Pallets	\$61	0.0%	\$15		21.0%	0 - Pallets	\$107	60.2%	\$12	-64.4%	35.8%		
1 - Consumables	\$185,815	-1.9%	\$2,065	-5.2%	4.3%	1 - Consumables	\$410,424	-2.8%	\$4,560	-6.0%	4.1%		
2 - Home	\$62,223	-5.5%	\$691	-8.7%	15.1%	2 - Home	\$152,937	4.6%	\$1,699	1.1%	17.6%		
3 - Hardlines	\$60,125	7.4%	\$668	3.9%	15.1%	3 - Hardlines	\$146,270	9.0%	\$1,625	5.4%	17.4%		
4 - Apparel	\$93,798	-5.0%	\$1,042	-8.2%	18.3%	4 - Apparel	\$223,579	-7.8%	\$2,484	-10.9%	17.0%		
5 - Furniture	\$16,423	-8.0%	\$213	-14.0%	6.0%	5 - Furniture	\$39,395	-4.0%	\$448	-10.6%	6.8%		
6 - Seasonal	\$45,182	-2.7%	\$502	-5.9%	8.2%	6 - Seasonal	\$111,063	3.5%	\$1,234	0.1%	7.3%		
Total	\$463,627	-2.2%	\$5,151	-5.5%	11.2%	Total	\$1,083,775	-0.9%	\$12,042	-4.2%	11.3%		
Running Total Net Sales MTD						Running Total Net Sales YTD							
RetailMonth	Net Sales	% Chng	Avg Store Sales	Avg % Chng	Mkdwn %	Retail Year	Net Sales	% Chng	Avg Store Sales	Avg % Chng	Mkdwn %		
2	\$14,283,400	5.6%	\$158,704	2.0%	15.8%	2024	\$30,426,956	4.0%	\$334,362	-0.6%	14.5%		
0 - Pallets	\$845	-21.1%	\$34	-2.1%	50.9%	0 - Pallets	\$1,607	-31.4%	\$45	-10.5%	50.1%		
1 - Consumables	\$5,268,850	2.1%	\$58,543	-1.3%	4.2%	1 - Consumables	\$11,342,608	5.7%	\$124,644	1.0%	4.3%		
2 - Home	\$1,944,724	-0.4%	\$21,608	-3.8%	10.7%	2 - Home	\$4,023,712	-7.3%	\$44,217	-11.4%	7.0%		
3 - Hardlines	\$2,193,369	22.7%	\$24,371	18.6%	24.1%	3 - Hardlines	\$4,805,625	13.9%	\$52,809	8.9%	25.4%		
4 - Apparel	\$3,098,105	2.4%	\$34,423	-1.0%	31.2%	4 - Apparel	\$6,728,415	2.4%	\$73,939	-2.1%	27.2%		
5 - Furniture	\$401,571	-10.8%	\$4,462	-13.8%	6.4%	5 - Furniture	\$757,253	-17.6%	\$8,321	-21.2%	5.4%		
6 - Seasonal	\$1,375,935	19.6%	\$15,288	15.6%	5.2%	6 - Seasonal	\$2,767,736	11.6%	\$30,415	6.7%	4.5%		
Total	\$14,283,400	5.6%	\$158,704	2.0%	15.8%	Total	\$30,426,956	4.0%	\$334,362	-0.6%	14.5%		

What happens if this row is highlighted?

- MTD, YTD tables will filter:
 - Division 2 - Home
 - Retail Week 8 (to date)
- What about the Day table?

Retail Year

2024

Comp Status

Comp

Non-Comp

Running Total Net Sales Day

Retail Day With Date	Net Sales	% Chng	Avg Store Sales	Avg % Chng	Mkdwn %
51 - 3/25/2024	\$62,223	-5.5%	\$691	-8.7%	17.3%
2 - Home	\$62,223	-5.5%	\$691	-8.7%	17.3%
Total	\$62,223	-5.5%	\$691	-8.7%	17.3%

District

All

Store Name

Running Total Net Sales WTD

Retail Week	Net Sales	% Chng	Avg Store Sales	Avg % Chng	Mkdwn %
8	\$1,083,775	-0.9%	\$12,042	-4.2%	11.3%
0 - Pallets	\$107	60.2%	\$12	-64.4%	35.8%
1 - Consumables	\$410,424	-2.8%	\$4,560	-6.0%	4.1%
2 - Home	\$152,937	4.6%	\$1,699	1.1%	17.6%
3 - Hardlines	\$146,270	9.0%	\$1,625	-5.4%	17.4%
4 - Apparel	\$223,579	-7.8%	\$2,484	-10.9%	17.0%
5 - Furniture	\$39,395	-4.0%	\$448	-10.6%	6.8%
6 - Seasonal	\$111,063	3.5%	\$1,234	0.1%	7.3%
Total	\$1,083,775	-0.9%	\$12,042	-4.2%	11.3%

Running Total Net Sales MTD

RetailMonth	Net Sales	% Chng	Avg Store Sales	Avg % Chng	Mkdwn %
2	\$152,937	4.6%	\$1,699	1.1%	17.6%
2 - Home	\$152,937	4.6%	\$1,699	1.1%	17.6%
Total	\$152,937	4.6%	\$1,699	1.1%	17.6%

Running Total Net Sales YTD

Retail Year	Net Sales	% Chng	Avg Store Sales	Avg % Chng	Mkdwn %
2024	\$152,937	4.6%	\$1,699	1.1%	17.6%
2 - Home	\$152,937	4.6%	\$1,699	1.1%	17.6%
Total	\$152,937	4.6%	\$1,699	1.1%	17.6%

What happens if this row is highlighted?

- MTD, YTD tables will filter:

- Division 2 - Home
- Retail Week 8 (to date)

- What about the Day table?

- The Day table is a lower level than Week to Date
- The data will stay the same since the filtering is being done at a higher level

Retail Year

2024

Comp Status

Comp

Non-Comp

Running Total Net Sales Day

Retail Day With Date	Net Sales	% Chng	Avg Store Sales	Avg % Chng	Mkdwn %
51 - 3/25/2024	\$62,223	-5.5%	\$691	-8.7%	17.3%
2 - Home	\$62,223	-5.5%	\$691	-8.7%	17.3%
Total	\$62,223	-5.5%	\$691	-8.7%	17.3%

District

All

Store Name

Running Total Net Sales WTD

Retail Week	Net Sales	% Chng	Avg Store Sales	Avg % Chng	Mkdwn %
8	\$1,083,775	-0.9%	\$12,042	-4.2%	11.3%
0 - Pallets	\$107	60.2%	\$12	-64.4%	35.8%
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5 - Furniture	\$39,395	-4.0%	\$448	-10.6%	6.8%
6 - Seasonal	\$111,063	3.5%	\$1,234	0.1%	7.3%
Total	\$1,083,775	-0.9%	\$12,042	-4.2%	11.3%

Running Total Net Sales MTD

RetailMonth	Net Sales	% Chng	Avg Store Sales	Avg % Chng	Mkdwn %
2	\$152,937	4.6%	\$1,699	1.1%	17.6%
2 - Home	\$152,937	4.6%	\$1,699	1.1%	17.6%
Total	\$152,937	4.6%	\$1,699	1.1%	17.6%

Running Total Net Sales YTD

Retail Year	Net Sales	% Chng	Avg Store Sales	Avg % Chng	Mkdwn %
2024	\$152,937	4.6%	\$1,699	1.1%	17.6%
2 - Home	\$152,937	4.6%	\$1,699	1.1%	17.6%
Total	\$152,937	4.6%	\$1,699	1.1%	17.6%

In Summary

- When approaching a new Power BI Report, take time to acclimate to the format
 - Slicers
 - Visual Titles
 - Categories
 - Documentation Page
- The lower the level, the more the data will filter

Q&A