Filtering

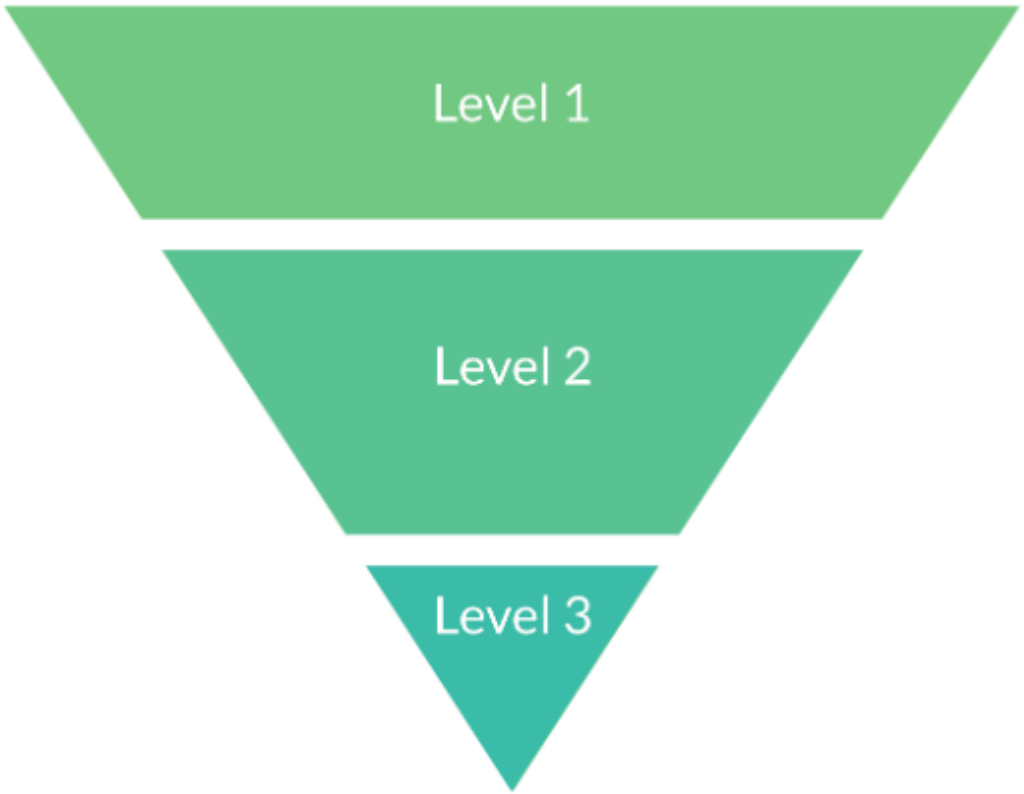
Drilling down and filtering

INTRODUCTION TO POWER BI

All Files are here:

https://github.com/fenago/cts245X/tree/main/CTS2451IntroToPowerBI/Exercises

Drilling down

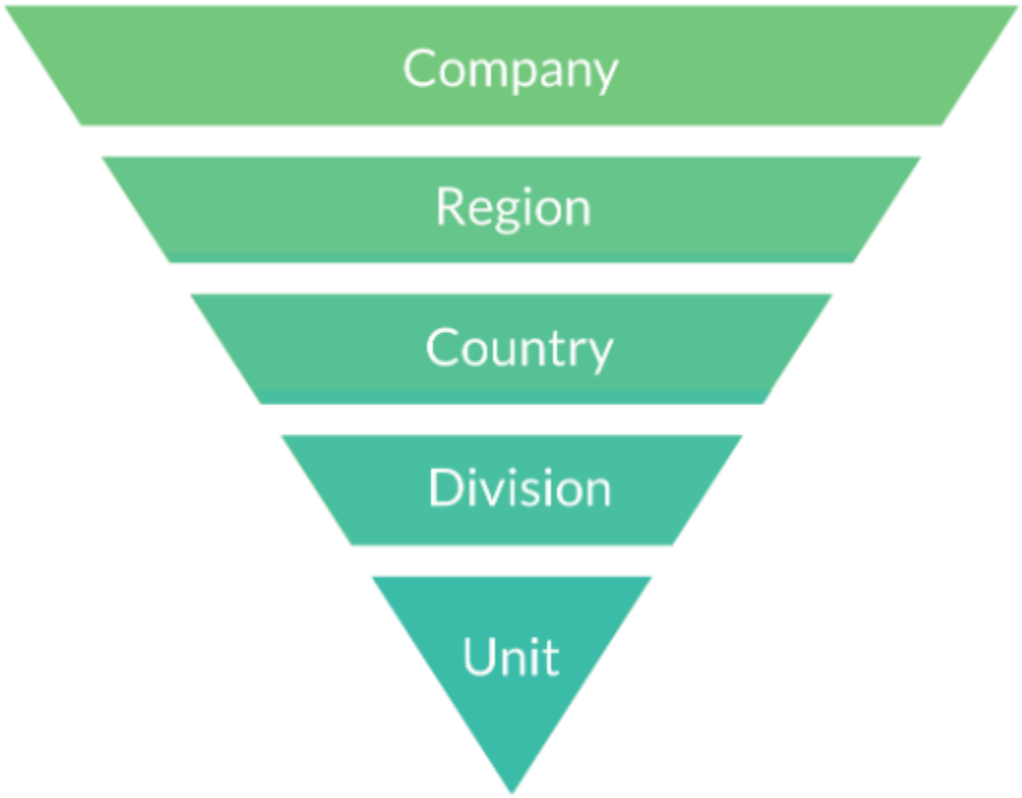


- Show data at a high level
- Option to show a more detailed level

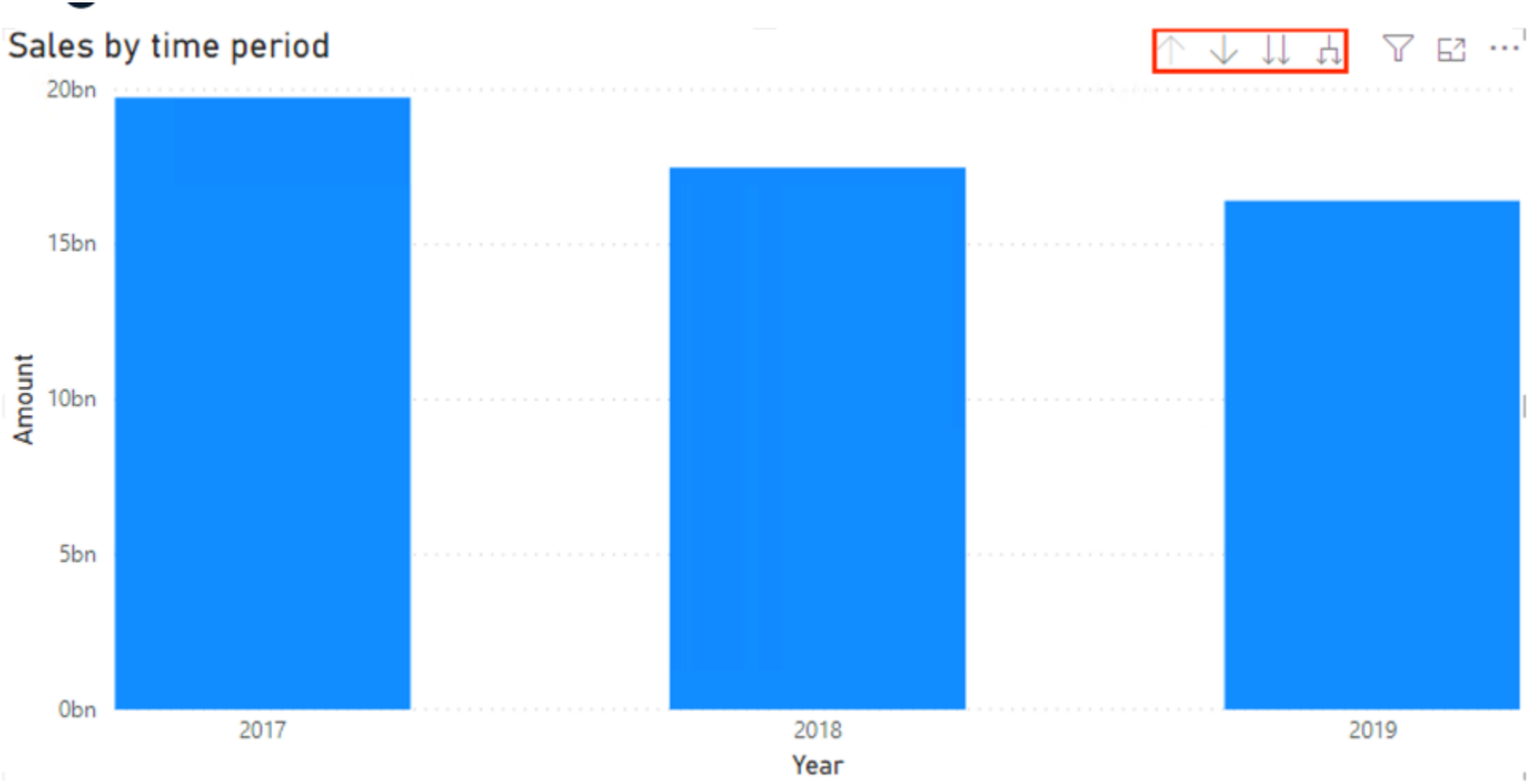
Hierarchies

Example 1

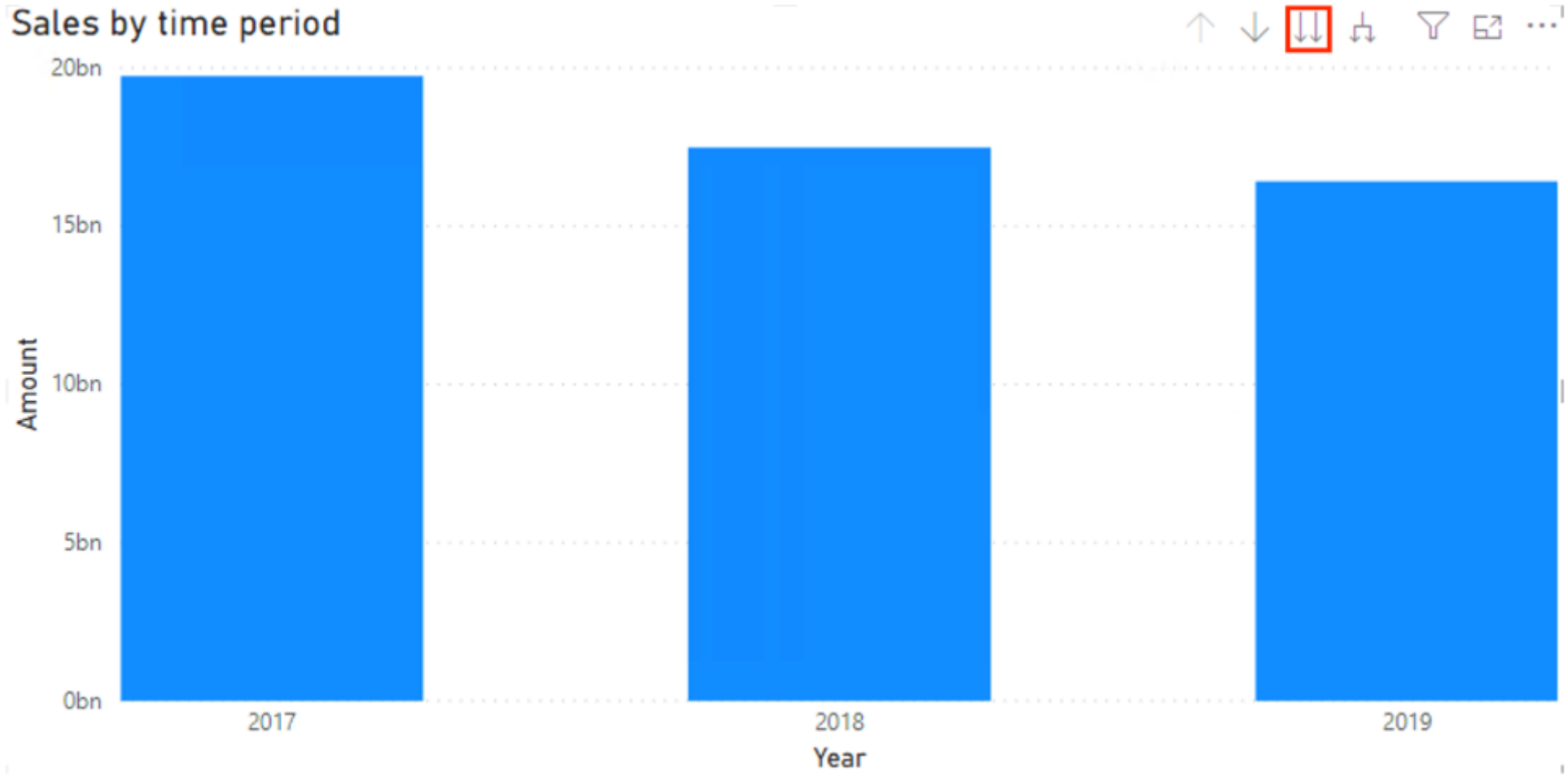
Example 2



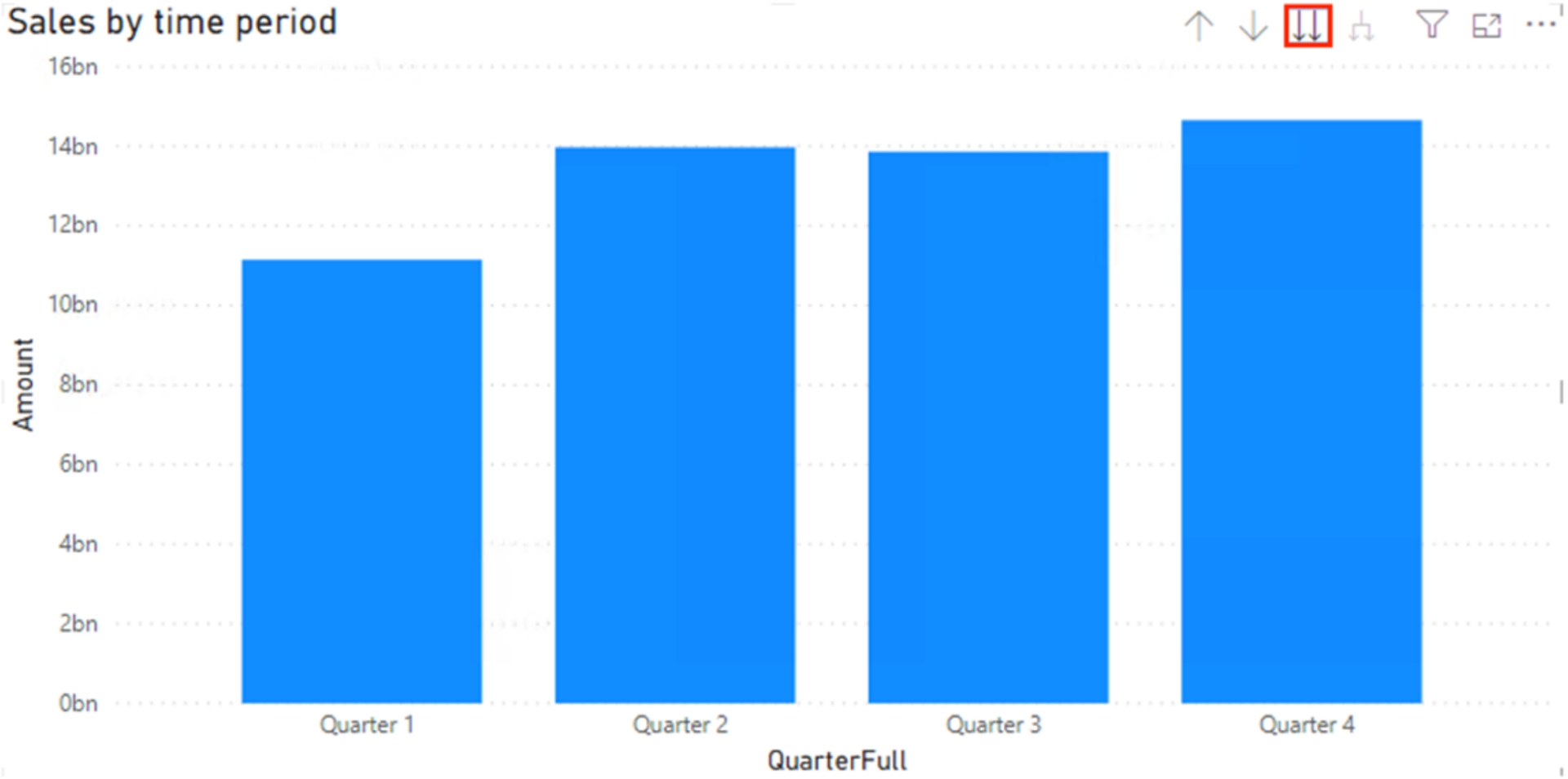
Drilling down on a visual



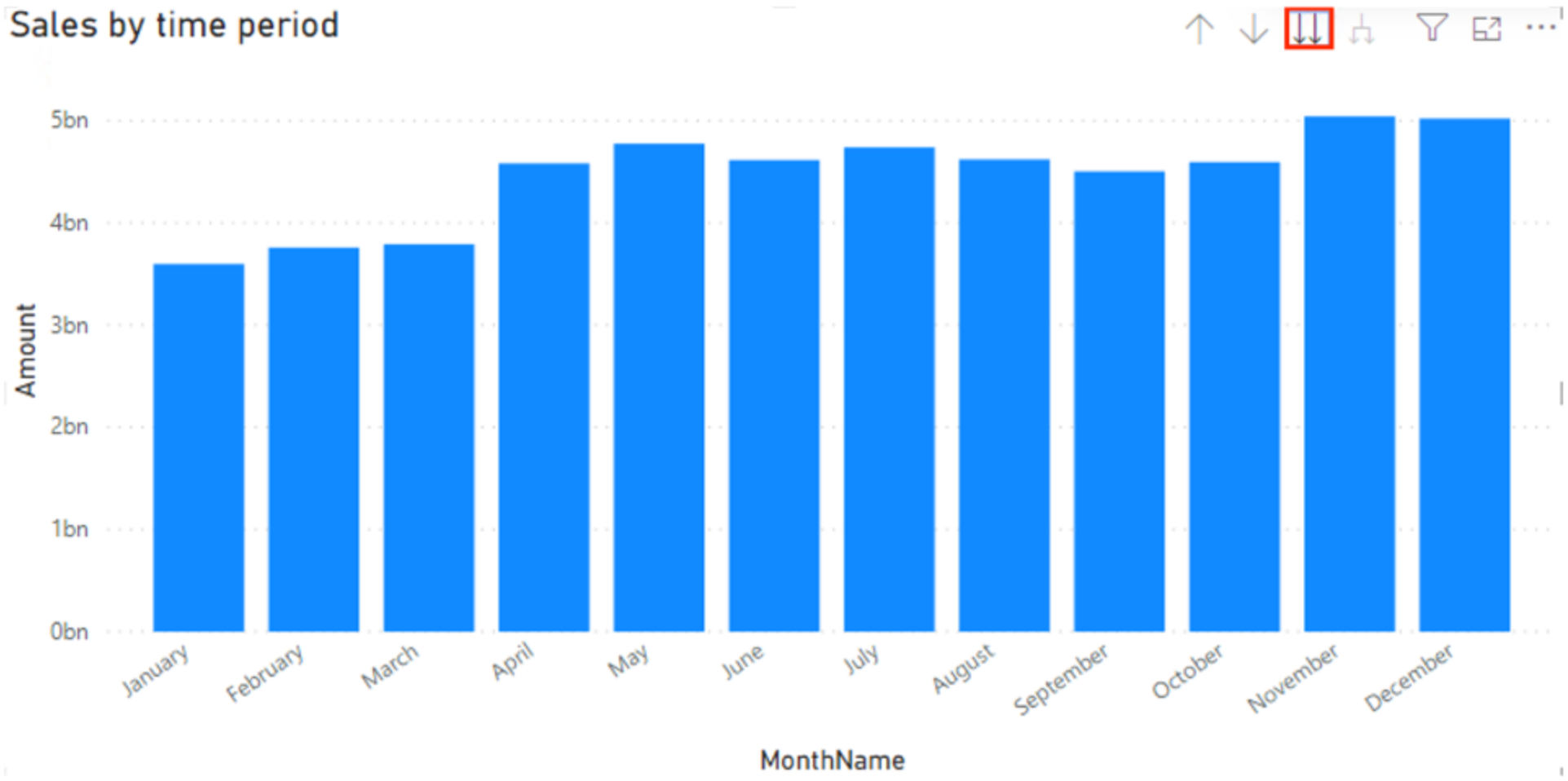
Drill down all fields at once



Expand all fields at once



Drill down all fields at once



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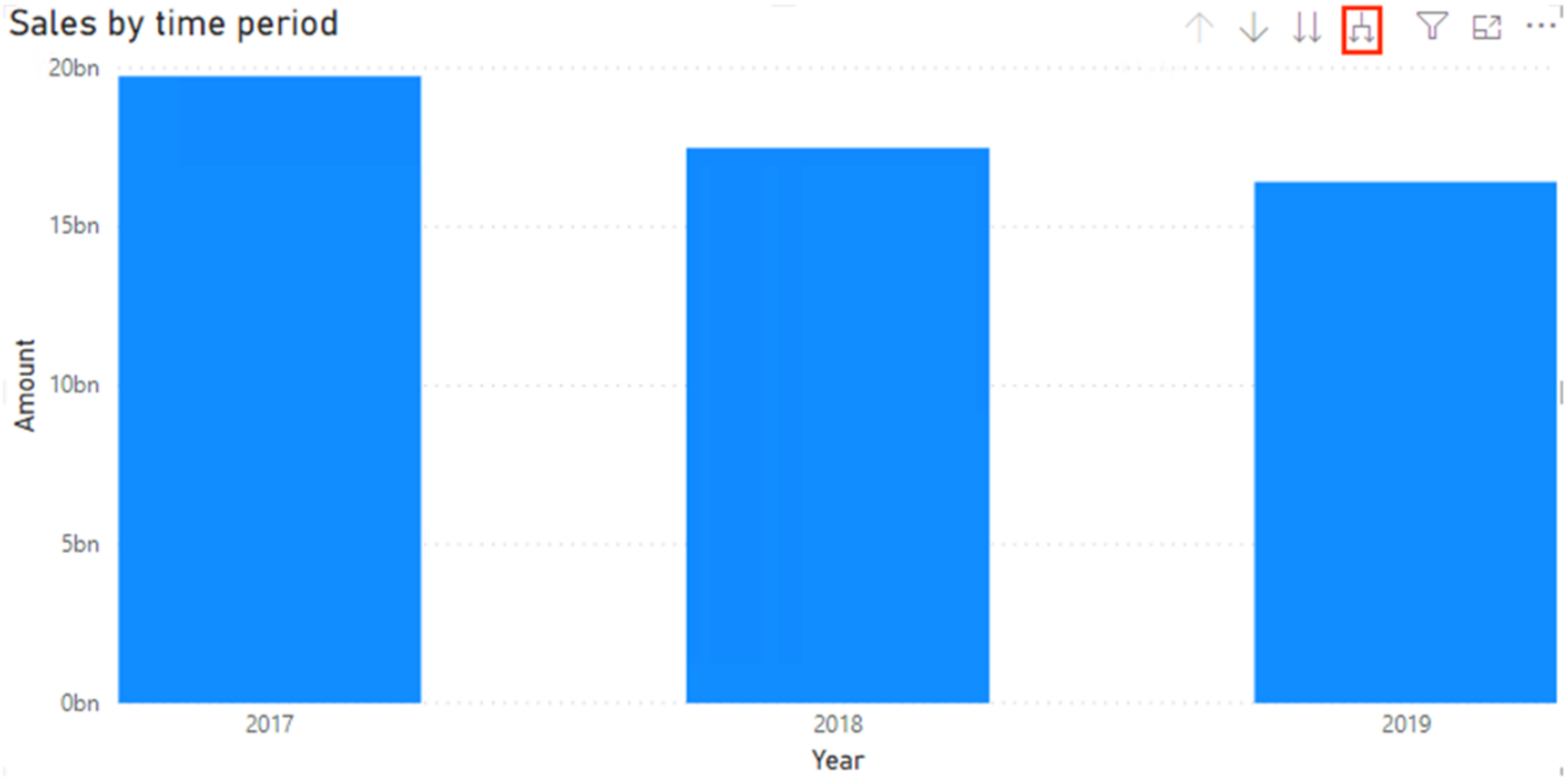

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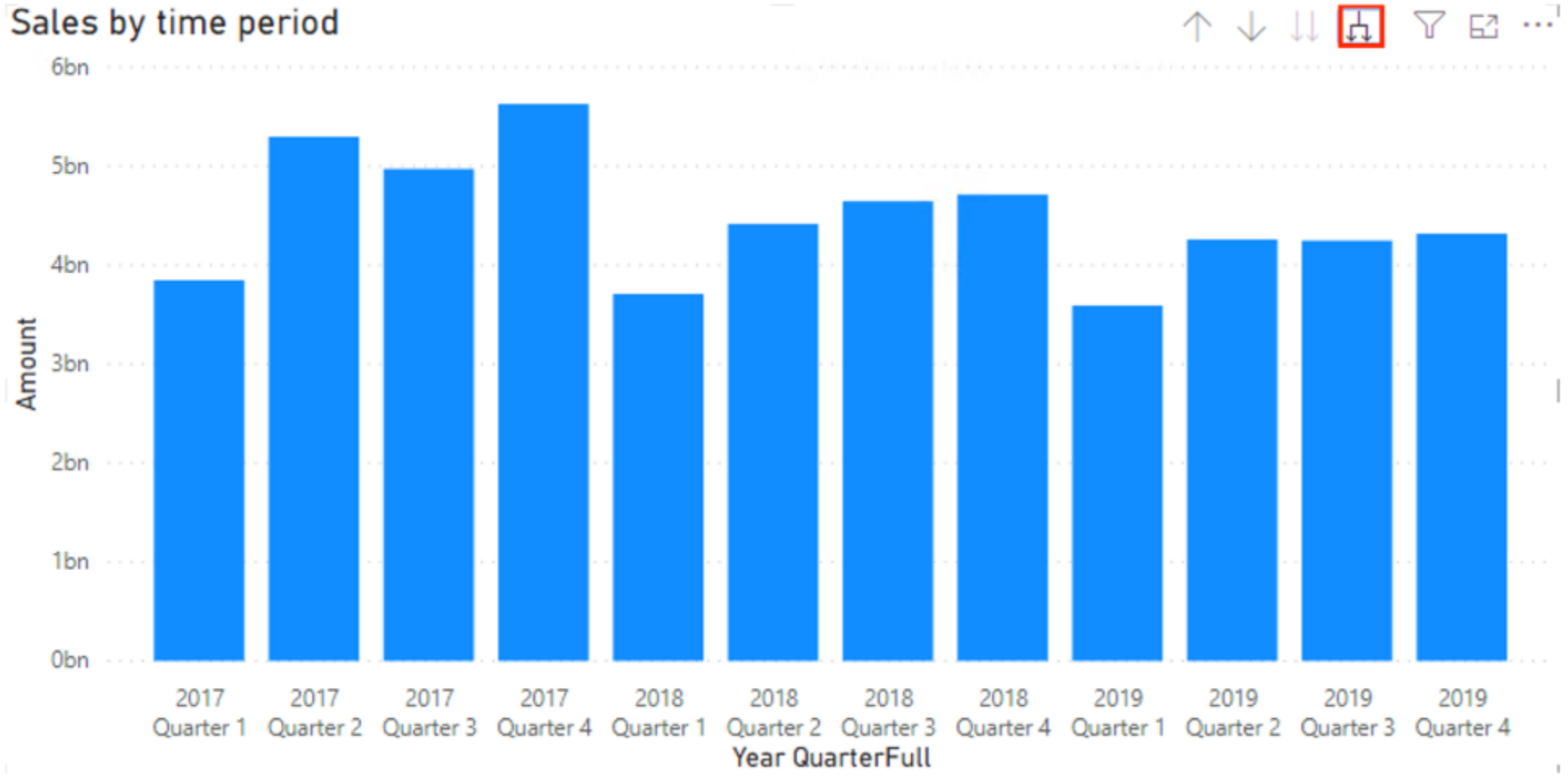
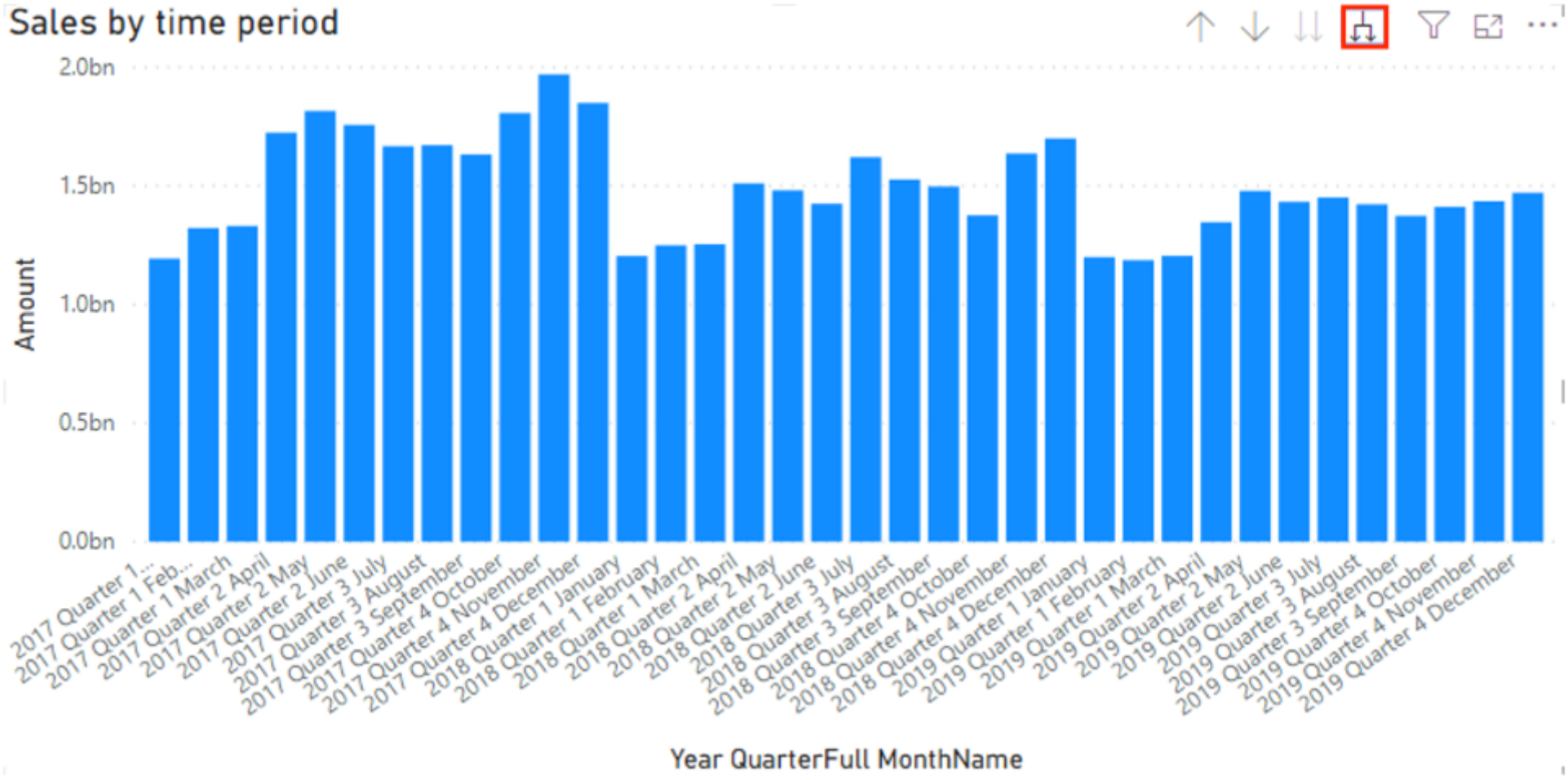


Expand all fields at once



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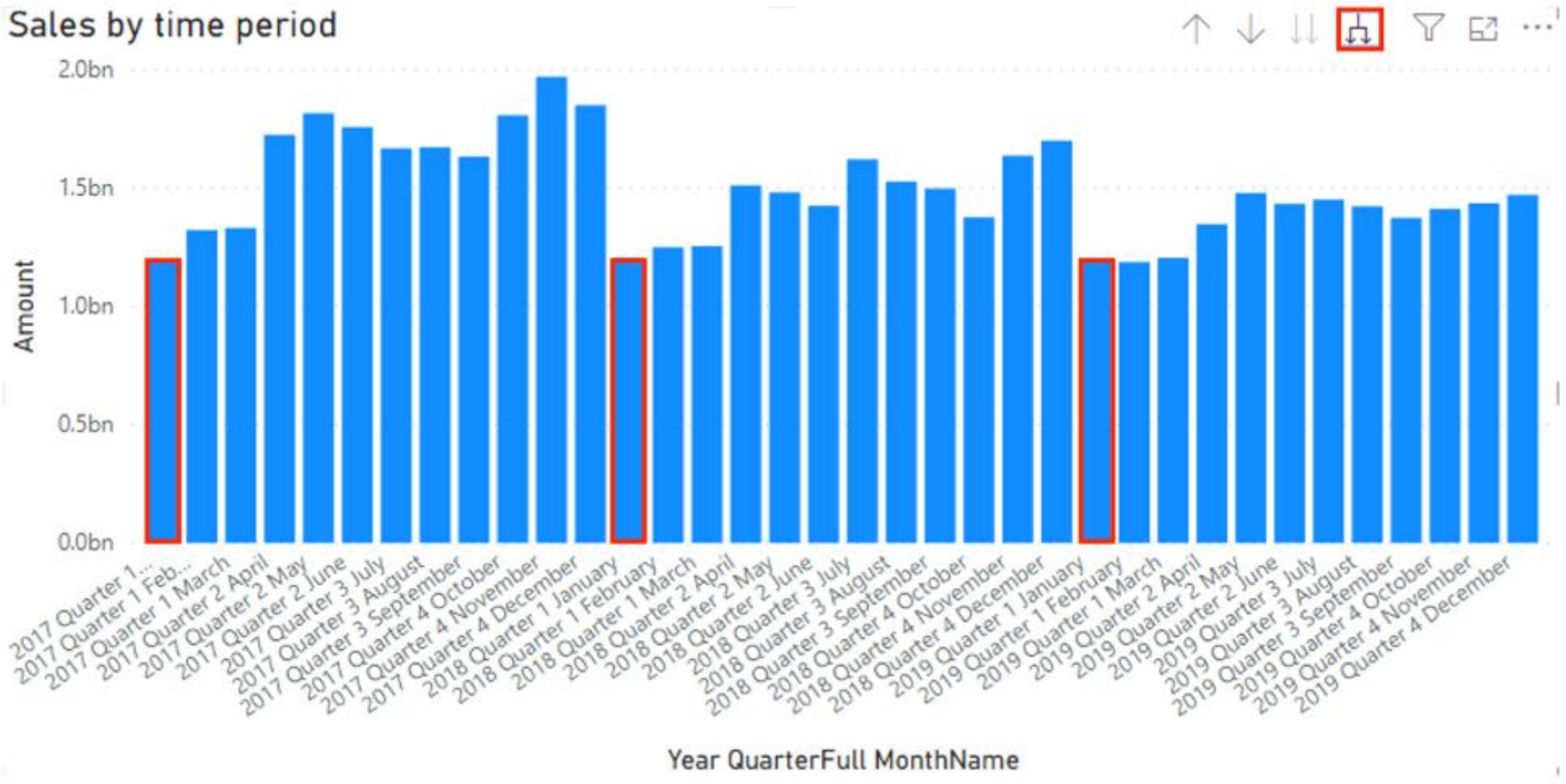


Filtering

- Display data based on some selected criteria
- Examples:
  - Filter on one year or one customer
  - Show the top 5 regions
- Types of filters in Power BI:
  - Visual-level filters
  - Page-level filters
  - Report-level filters

Turning off filtering

- Don't allow the end-user of your report to change the filters
- In Power BI: turning off interactions
  - Visual will not change when another field is selected

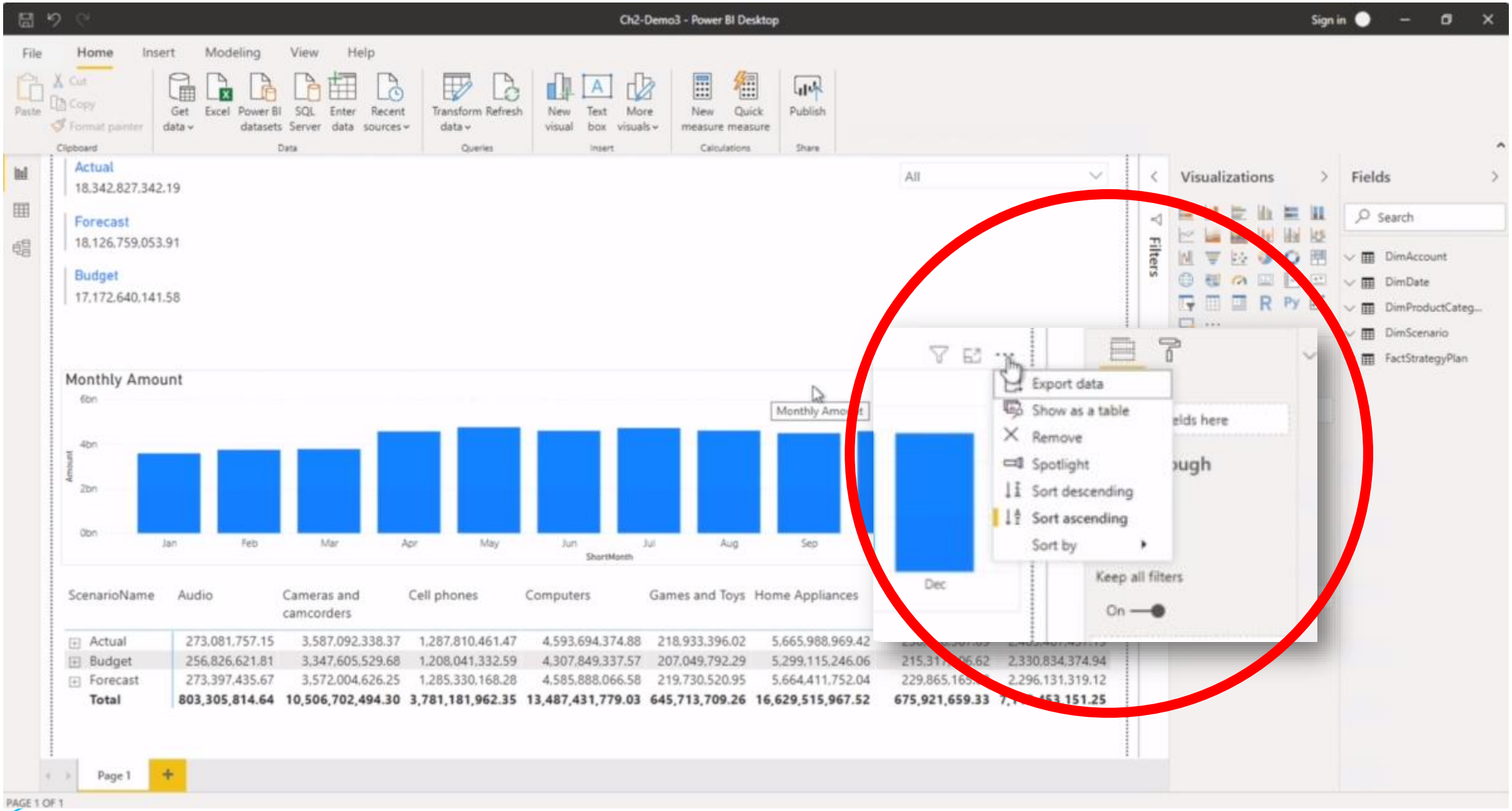
Let's practice!

Working with hierarchies

You don't always want to look at all the available data in your Power BI visualizations. Depending on the business question you are trying to answer, you may want to drill down to look at additional relevant details. Drilling down accomplishes this by using hierarchies. But how much do you know about hierarchies?

Which statement about hierarchies is true?

A. A hierarchy is a new column type.
B. A hierarchy enables the ability to show different levels of data without having to create new visuals.
C. A hierarchy is a specific drill-down visual you can use in Power BI.
D. A hierarchy is an add-on to the data view.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Cameras and camcorders
Cell phones
Computers
Games and Toys
Home Appliances
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273,081,757.15
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Page 1
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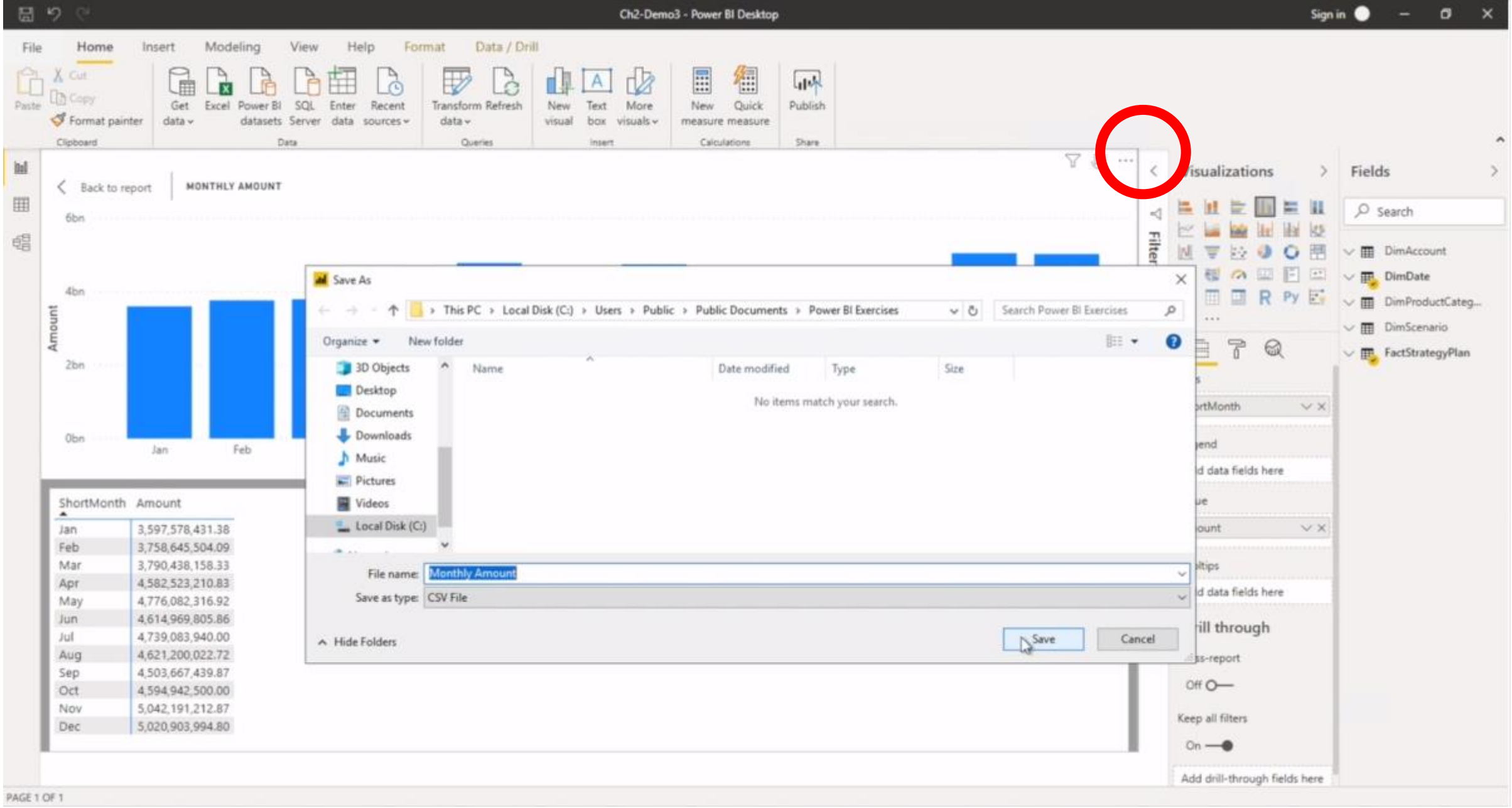
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Search Power BI Exercises
Organize
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Videos
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Save as type: CSV File
Hide Folders
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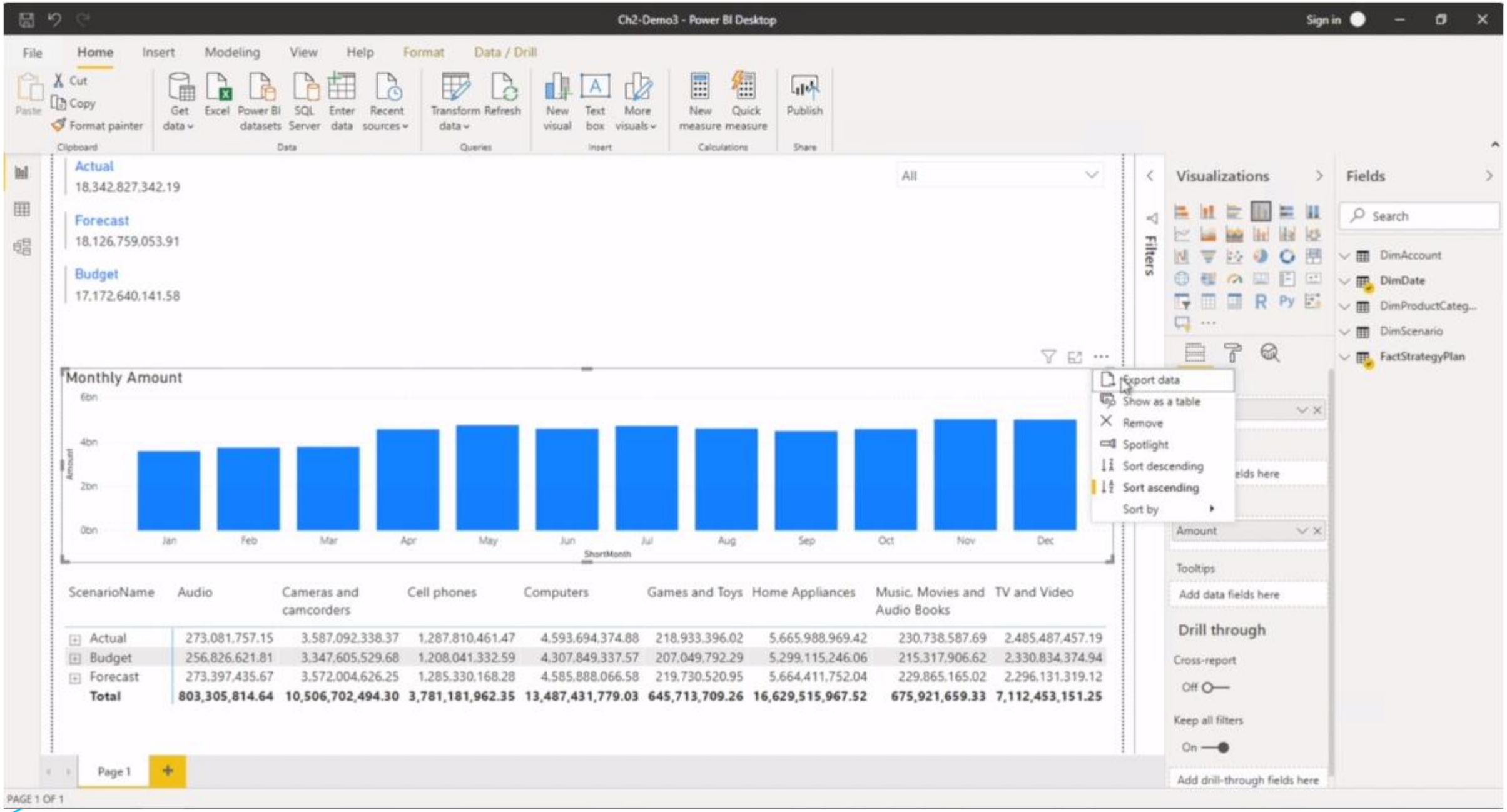
PAGE 1 OF 1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Page 1
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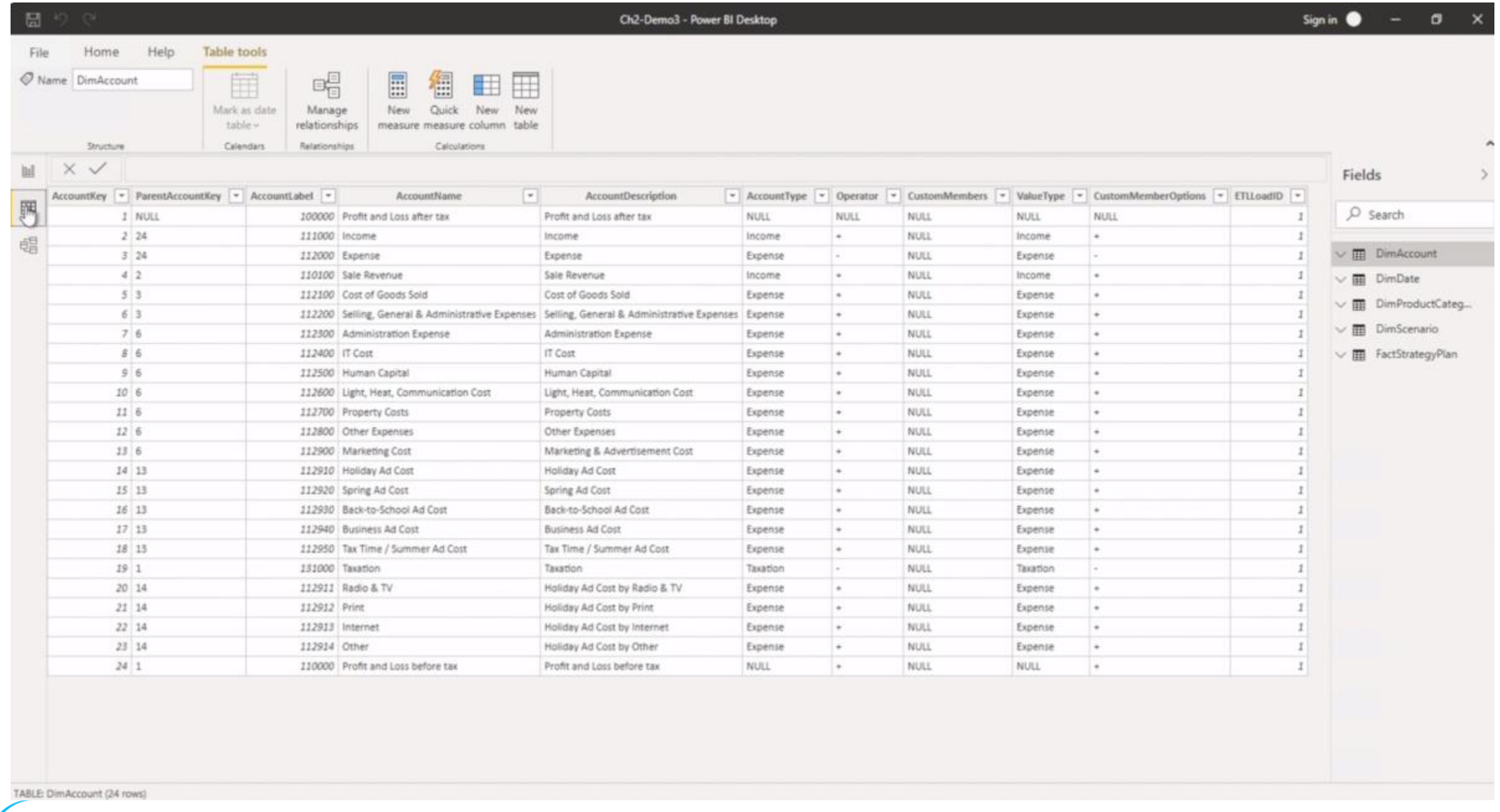
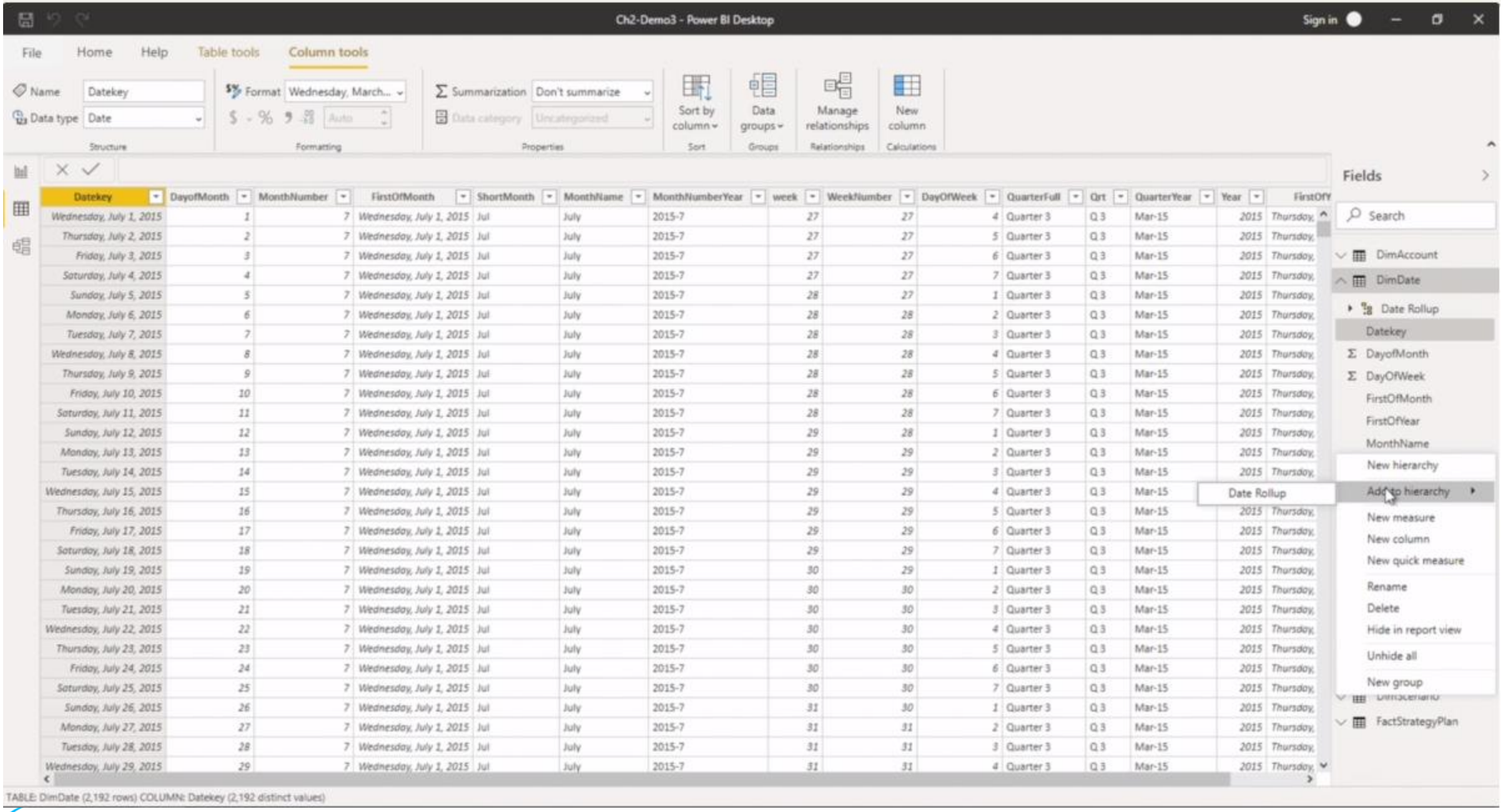


AccountKey	ParentAccountKey	AccountLabel	AccountName	AccountDescription	AccountType	Operator	CustomMembers	ValueType	CustomMemberOptions	ETLLoadID
1	NULL	100000	Profit and Loss after tax	Profit and Loss after tax	NULL	NULL	NULL	NULL	NULL	1
2	24	111000	Income	Income	Income	+	NULL	Income	+	1
3	24	112000	Expense	Expense	Expense	-	NULL	Expense	-	1
4	2	110100	Sale Revenue	Sale Revenue	Income	+	NULL	Income	+	1
5	3	112100	Cost of Goods Sold	Cost of Goods Sold	Expense	+	NULL	Expense	+	1
6	3	112200	Selling, General & Administrative Expenses	Selling, General & Administrative Expenses	Expense	+	NULL	Expense	+	1
7	6	112300	Administration Expense	Administration Expense	Expense	+	NULL	Expense	+	1
8	6	112400	IT Cost	IT Cost	Expense	+	NULL	Expense	+	1
9	6	112500	Human Capital	Human Capital	Expense	+	NULL	Expense	+	1
10	6	112600	Light, Heat, Communication Cost	Light, Heat, Communication Cost	Expense	+	NULL	Expense	+	1
11	6	112700	Property Costs	Property Costs	Expense	+	NULL	Expense	+	1
12	6	112800	Other Expenses	Other Expenses	Expense	+	NULL	Expense	+	1
13	6	112900	Marketing Cost	Marketing & Advertisement Cost	Expense	+	NULL	Expense	+	1
14	13	112910	Holiday Ad Cost	Holiday Ad Cost	Expense	+	NULL	Expense	+	1
15	13	112920	Spring Ad Cost	Spring Ad Cost	Expense	+	NULL	Expense	+	1
16	13	112930	Back-to-School Ad Cost	Back-to-School Ad Cost	Expense	+	NULL	Expense	+	1
17	13	112940	Business Ad Cost	Business Ad Cost	Expense	+	NULL	Expense	+	1
18	13	112950	Tax Time / Summer Ad Cost	Tax Time / Summer Ad Cost	Expense	+	NULL	Expense	+	1
19	1	131000	Taxation	Taxation	Taxation	-	NULL	Taxation	-	1
20	14	112911	Radio & TV	Holiday Ad Cost by Radio & TV	Expense	+	NULL	Expense	+	1
21	14	112912	Print	Holiday Ad Cost by Print	Expense	+	NULL	Expense	+	1
22	14	112913	Internet	Holiday Ad Cost by Internet	Expense	+	NULL	Expense	+	1
23	14	112914	Other	Holiday Ad Cost by Other	Expense	+	NULL	Expense	+	1
24	1	110000	Profit and Loss before tax	Profit and Loss before tax	NULL	+	NULL	NULL	+	1



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Thursday, July 2, 2015	2	7	Wednesday, July 1, 2015	Jul	July	2015-7	27	27	5	Quarter 3	Q 3	Mar-15	2015	Thursday,
Friday, July 3, 2015	3	7	Wednesday, July 1, 2015	Jul	July	2015-7	27	27	6	Quarter 3	Q 3	Mar-15	2015	Thursday,
Saturday, July 4, 2015	4	7	Wednesday, July 1, 2015	Jul	July	2015-7	27	27	7	Quarter 3	Q 3	Mar-15	2015	Thursday,
Sunday, July 5, 2015	5	7	Wednesday, July 1, 2015	Jul	July	2015-7	28	27	1	Quarter 3	Q 3	Mar-15	2015	Thursday,
Monday, July 6, 2015	6	7	Wednesday, July 1, 2015	Jul	July	2015-7	28	28	2	Quarter 3	Q 3	Mar-15	2015	Thursday,
Tuesday, July 7, 2015	7	7	Wednesday, July 1, 2015	Jul	July	2015-7	28	28	3	Quarter 3	Q 3	Mar-15	2015	Thursday,
Wednesday, July 8, 2015	8	7	Wednesday, July 1, 2015	Jul	July	2015-7	28	28	4	Quarter 3	Q 3	Mar-15	2015	Thursday,
Thursday, July 9, 2015	9	7	Wednesday, July 1, 2015	Jul	July	2015-7	28	28	5	Quarter 3	Q 3	Mar-15	2015	Thursday,
Friday, July 10, 2015	10	7	Wednesday, July 1, 2015	Jul	July	2015-7	28	28	6	Quarter 3	Q 3	Mar-15	2015	Thursday,
Saturday, July 11, 2015	11	7	Wednesday, July 1, 2015	Jul	July	2015-7	28	28	7	Quarter 3	Q 3	Mar-15	2015	Thursday,
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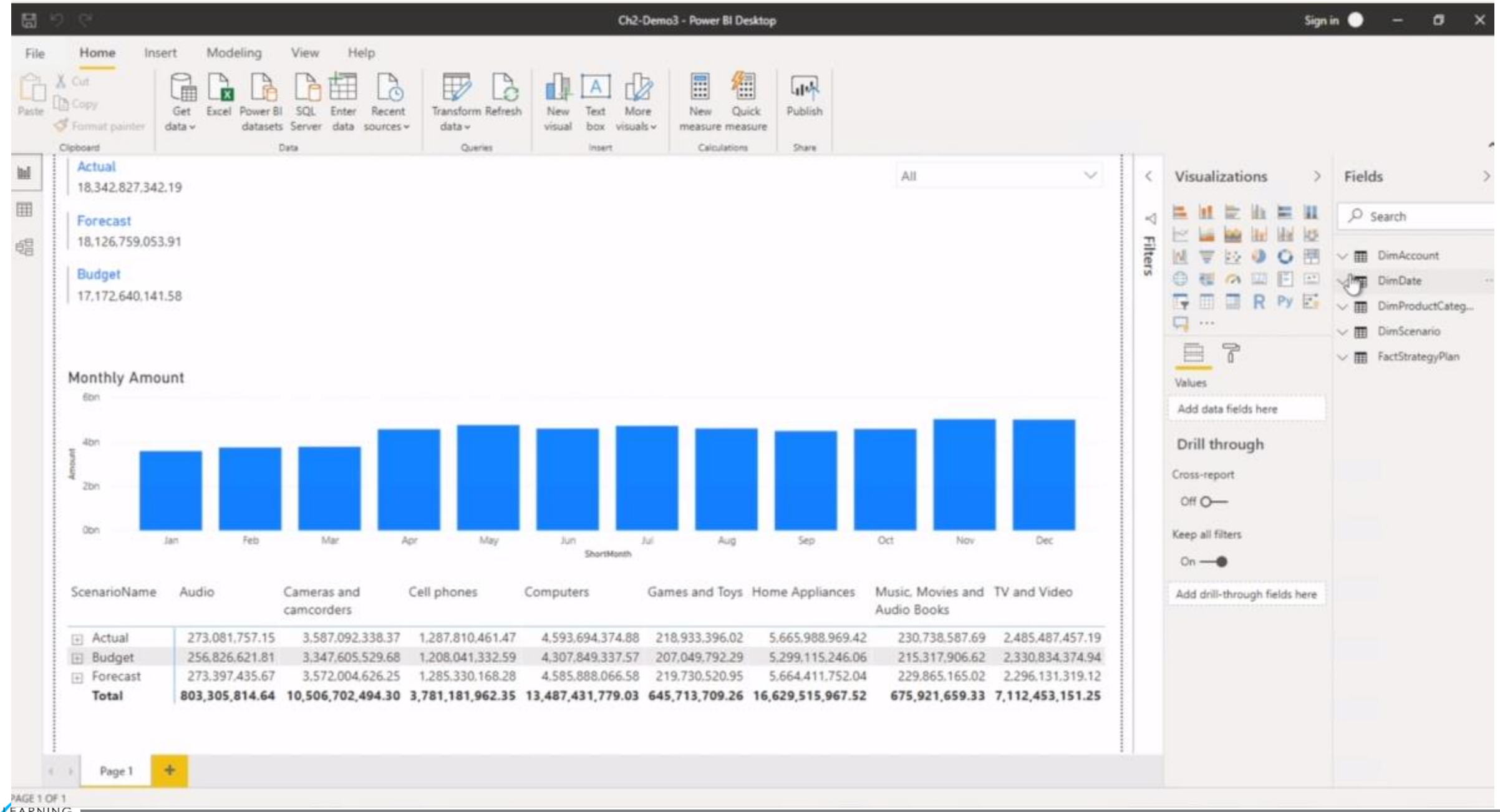
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Actual
18,342,827,342.19
Forecast
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Monthly Amount
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ShortMonth
ScenarioName | Audio | Cameras and camcorders | Cell phones | Computers | Games and Toys | Home Appliances | Music, Movies and Audio Books | TV and Video
Actual | 273,081,757.15 | 3,587,092,338.37 | 1,287,810,461.47 | 4,593,694,374.88 | 218,933,396.02 | 5,665,988,969.42 | 230,738,587.69 | 2,485,487,457.19
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Filters
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Values
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Fields
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Page 1
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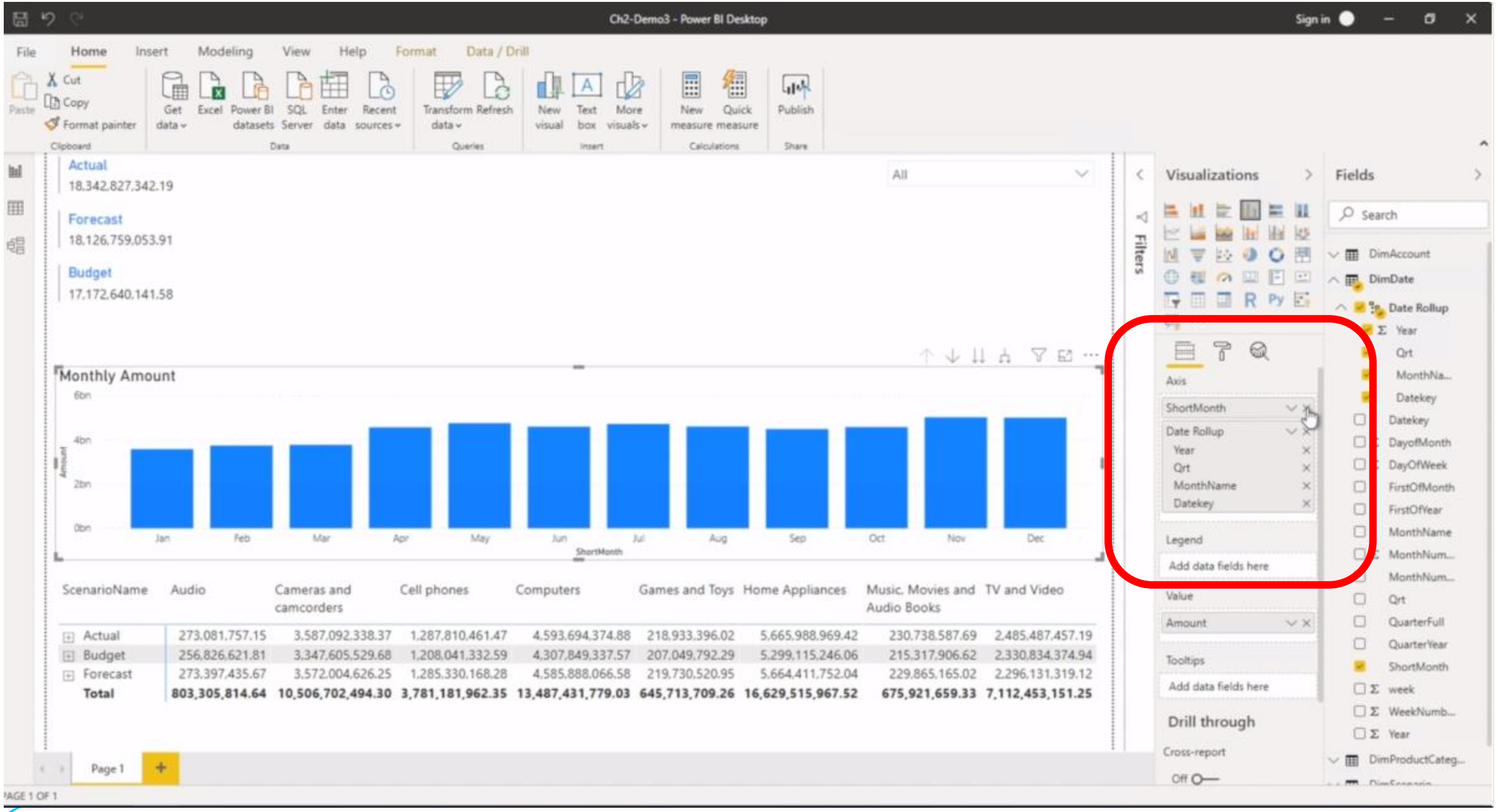
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215.317.906.62
2.330.834.374.94
Forecast
273.397.435.67
3.572.004.626.25
1.285.330.168.28
4.585.888.066.58
219.730.520.95
5.664.411.752.04
229.865.165.02
2.296.131.319.12
Total
803,305,814.64
10,506,702,494.30
3,781,181,962.35
13,487,431,779.03
645,713,709.26
16,629,515,967.52
675,921,659.33
7,112,453,151.25
Page 1
PAGE 1 OF 1
Filters
Visualizations
Axis
ShortMonth
Date Rollup
Year
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MonthName
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Legend
Add data fields here
Value
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Tooltips
Add data fields here
Drill through
Cross-report
Off
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FirstOfMonth
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QuarterYear
ShortMonth
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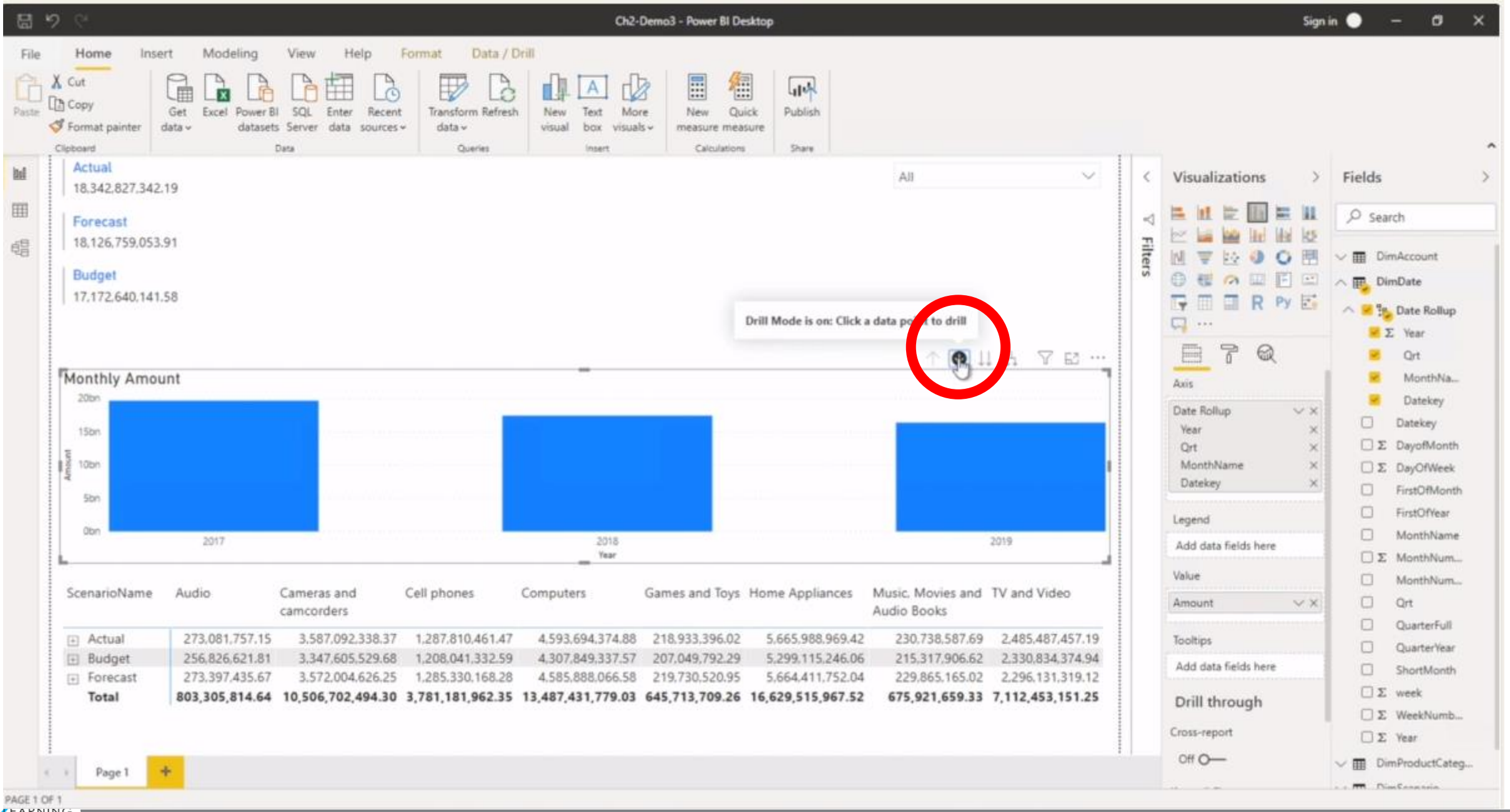
WeekNumb...
Year
DimProductCateg...


Ch2-Demo3 - Power BI Desktop
Sign in
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Format painter
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Clipboard
Get data
Excel
Power BI datasets
SQL Server
Enter data
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Transform data
Refresh
Queries
New visual
Text box
More visuals
Insert
New measure
Quick measure
Calculations
Publish
Share
Actual
18,342,827,342.19
Forecast
18,126,759,053.91
Budget
17,172,640,141.58
All
Drill Mode is on: Click a data point to drill
Monthly Amount
20bn
15bn
10bn
5bn
0bn
Amount
2017
2018
2019
Year
ScenarioName
Audio
Cameras and camcorders
Cell phones
Computers
Games and Toys
Home Appliances
Music, Movies and Audio Books
TV and Video
Actual
273,081,757.15
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4,307,849,337.57
207,049,792.29
5,299,115,246.06
215,317,906.62
2,330,834,374.94
Forecast
273,397,435.67
3,572,004,626.25
1,285,330,168.28
4,585,888,066.58
219,730,520.95
5,664,411,752.04
229,865,165.02
2,296,131,319.12
Total
803,305,814.64
10,506,702,494.30
3,781,181,962.35
13,487,431,779.03
645,713,709.26
16,629,515,967.52
675,921,659.33
7,112,453,151.25
Filters
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Year
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Tooltips
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week
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Year
DimProductCateg...
Page 1
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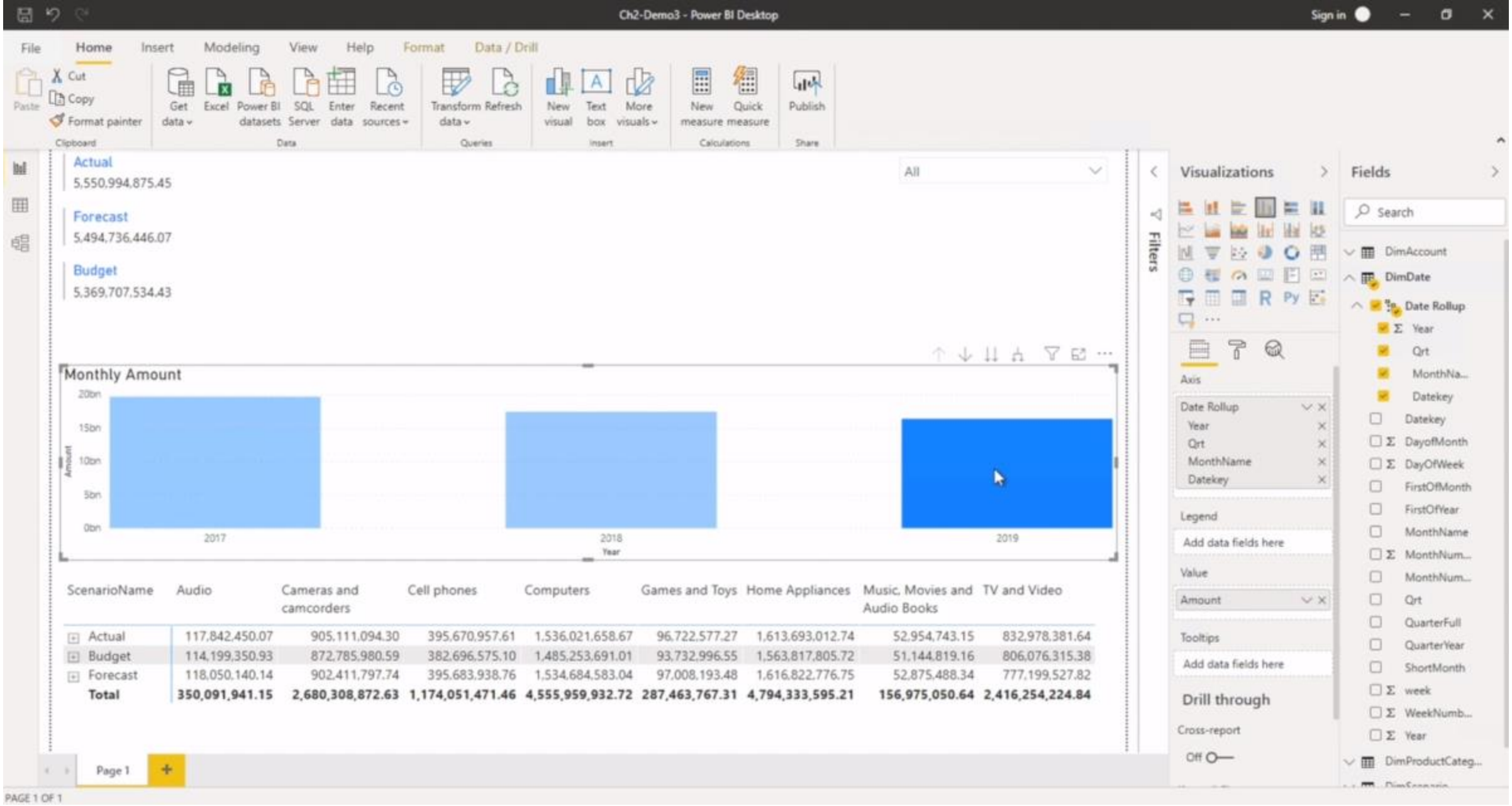
Ch2-Demo3 - Power BI Desktop
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New visual
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More visuals
Insert
New measure
Quick measure
Calculations
Publish
Share
Actual
5,550,994,875.45
Forecast
5,494,736,446.07
Budget
5,369,707,534.43
All
Monthly Amount
20bn
15bn
10bn
5bn
0bn
Amount
2017
2018
2019
Year
ScenarioName
Audio
Cameras and camcorders
Cell phones
Computers
Games and Toys
Home Appliances
Music, Movies and Audio Books
TV and Video
Actual
117,842,450.07
905,111,094.30
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96,722,577.27
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Budget
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382,696,575.10
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51,144,819.16
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Forecast
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4,794,333,595.21
156,975,050.64
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Page 1
PAGE 1 OF 1
Filters
Visualizations
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Add data fields here
Drill through
Cross-report
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DimAccount
DimDate
Date Rollup
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Datekey
DayofMonth
DayOfWeek
FirstOfMonth
FirstOfYear
MonthName
MonthNum...
MonthNum...
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QuarterFull
QuarterYear
ShortMonth
week
WeekNumb...
Year
DimProductCateg...

If you'd like to see the data that Power BI uses to create a visualization, you can display that data. You can even export the data as an `.xlsx` or `.csv` file so you can open it in Excel later. In this exercise, you'll look at the data and export it to a csv file that you will then open up with Windows' default text editor, Notepad. Notepad will open automatically if you double-click on any text file, like a `.csv` file.

Close any open reports and open the `4_1_looking_at_the_data.pbix` report from the Exercises folder on the desktop.

- Select the clustered column chart.
- Display the underlying data.

Export the data as a `.csv` file and save it on the desktop.

Open the `.csv` file with Notepad to look at the data.

What Is the last character In the csv file?

Sometimes you want to drill down into a chart and see different levels of your data. With hierarchies, you can add this functionality to your Power BI reports. Let's create a date hierarchy that looks like this: Year-Quarter-Month-Day.

If you lost progress, close any open reports and load `4_2_creating_a_hierarchy.pbix` from the `Exercises` folder on the desktop.

Navigate to the `DimDate` table in the *Data View*.

Create a hierarchy that starts with `Year`, goes on to the `QuarterFull`, then the `MonthName`, and ends with the `DateKey`.

If the drag functionality isn't working, you can right-click `DimDate`'s `Year` in the *Fields* pane and select "Create hierarchy". From there, you can right-click the necessary fields and select "Add to hierarchy".

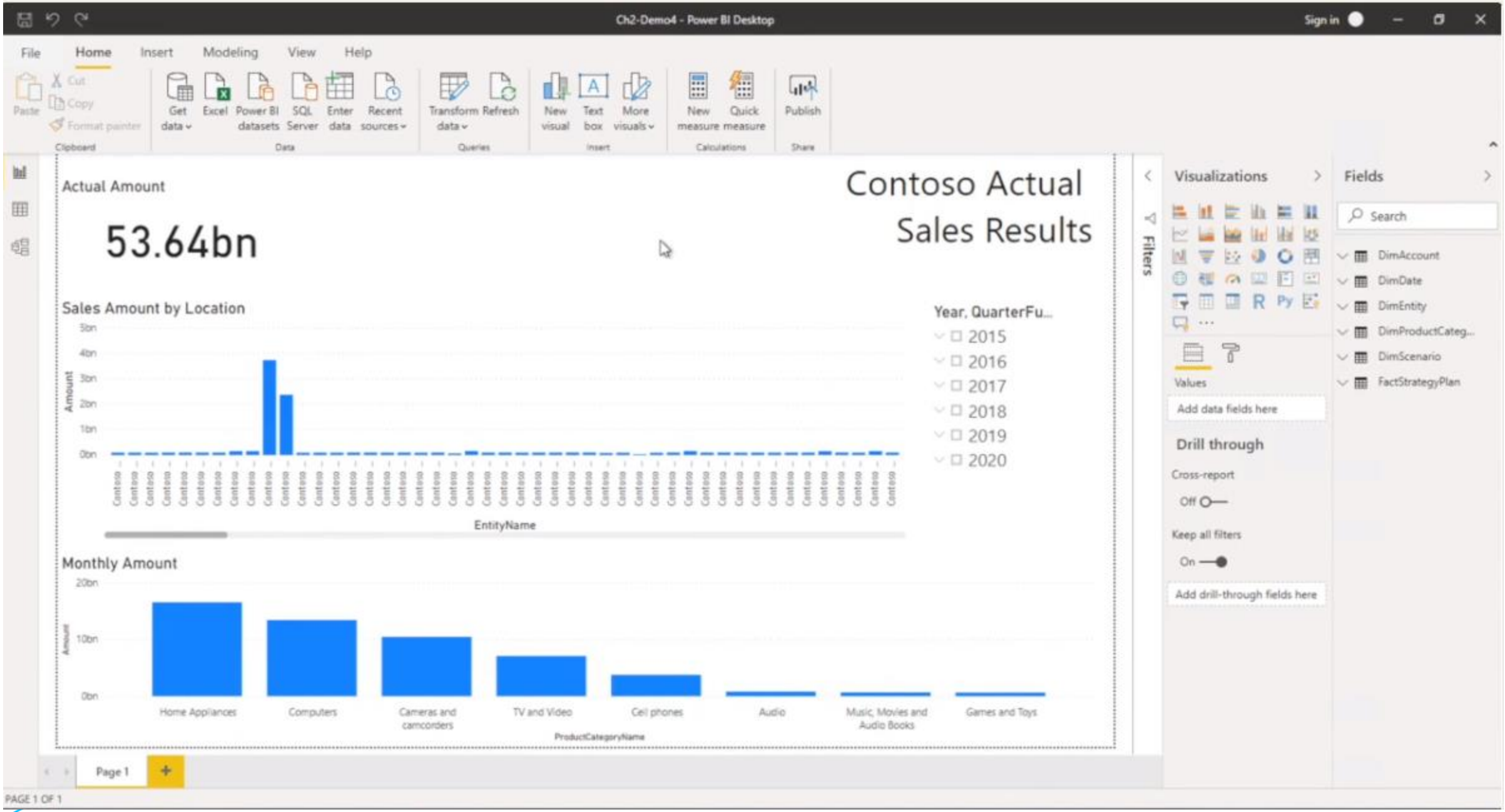
Rename the hierarchy to `Date Hierarchy`.

In the column chart on the *Report* view, replace the `ShortMonth` *Axis value* of the column chart by the `Date Hierarchy`.

Use the drill controls in the top right corner of the visual to explore the different levels. Click the single down arrow to enable drill mode.

Which quarter across all years had the highest amount (format example: Y2020 Q1)?

Filters


Ch2-Demo4 - Power BI Desktop
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Power BI datasets
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More visuals
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New measure
Quick measure
Calculations
Publish
Share
Actual Amount
53.64bn
Contoso Actual Sales Results
Sales Amount by Location
Amount
EntityName
Year, QuarterFu...
2015
2016
2017
2018
2019
2020
Monthly Amount
Home Appliances
Computers
Cameras and camcorders
TV and Video
Cell phones
Audio
Music, Movies and Audio Books
Games and Toys
ProductCategoryName
Visualizations
Filters
Values
Add data fields here
Drill through
Cross-report
Off
Keep all filters
On
Add drill-through fields here
Fields
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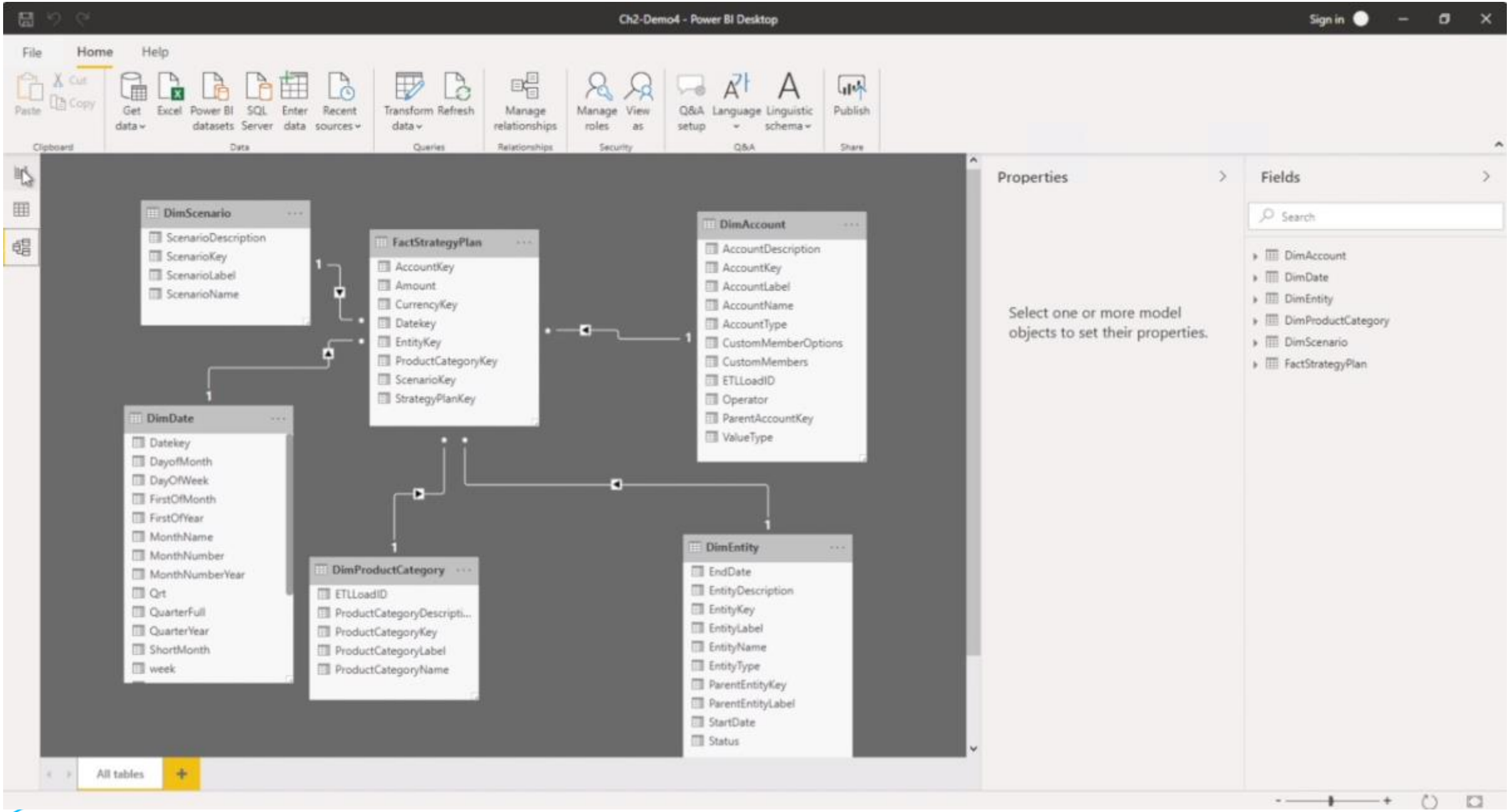
DimDate
DimEntity
DimProductCateg...
DimScenario
FactStrategyPlan
Page 1
PAGE 1 OF 1


Ch2-Demo4 - Power BI Desktop
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Power BI datasets
SQL Server
Enter data
Recent sources
Data
Transform data
Refresh
Queries
Manage relationships
Relationships
Manage roles
View as
Security
Q&A setup
Language
Linguistic schema
Q&A
Publish
Share
DimScenario
ScenarioDescription
ScenarioKey
ScenarioLabel
ScenarioName
FactStrategyPlan
AccountKey
Amount
CurrencyKey
Datekey
EntityKey
ProductCategoryKey
ScenarioKey
StrategyPlanKey
DimAccount
AccountDescription
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CustomMembers
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EndDate
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EntityKey
EntityLabel
EntityName
EntityType
ParentEntityKey
ParentEntityLabel
StartDate
Status
All tables
Properties
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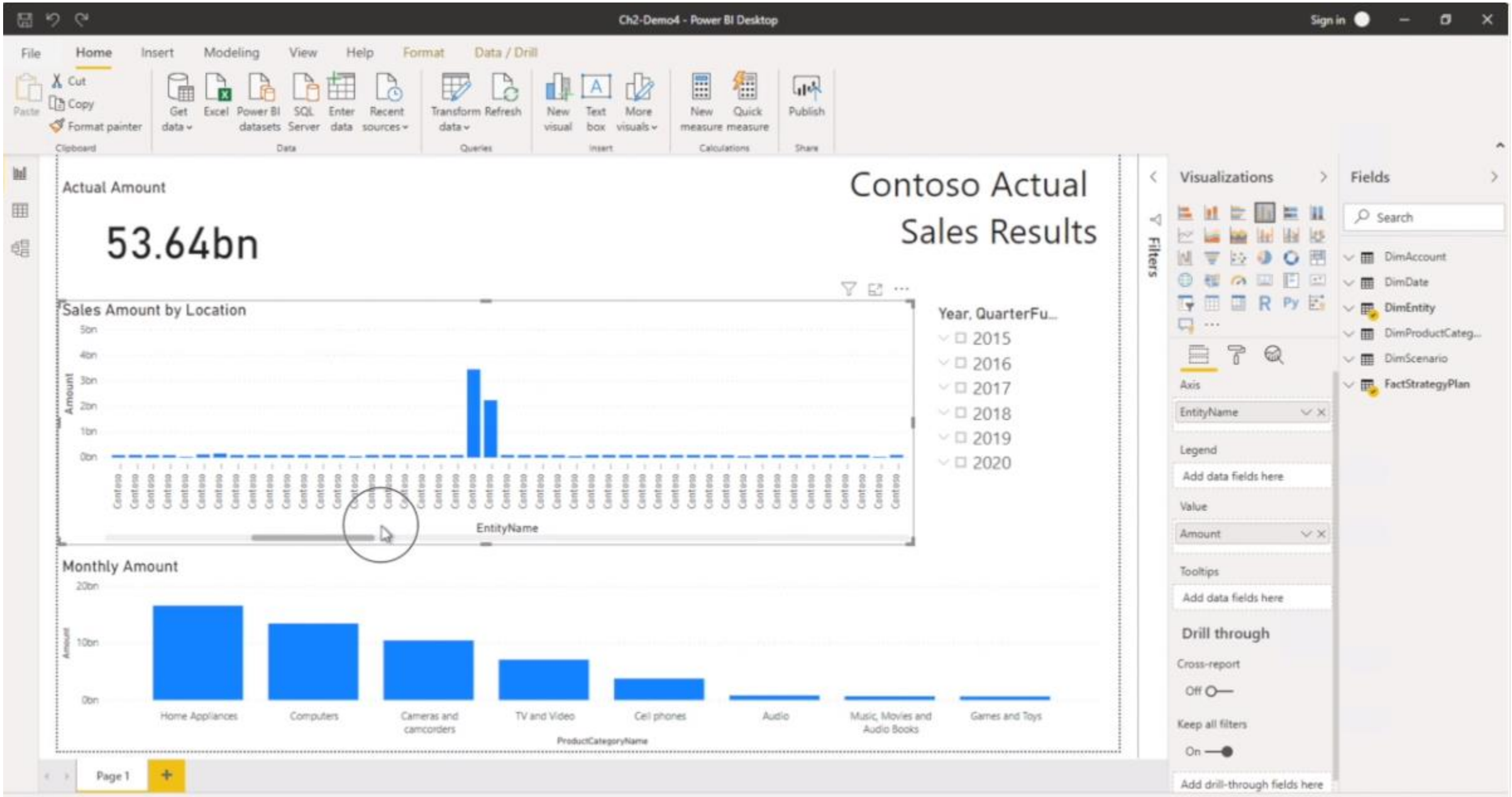
Search
DimAccount
DimDate
DimEntity
DimProductCategory
DimScenario
FactStrategyPlan


Ch2-Demo4 - Power BI Desktop
Sign in
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Format painter
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Get data
Excel
Power BI datasets
SQL Server
Enter data
Recent sources
Data
Transform data
Refresh
Queries
New visual
Text box
More visuals
Insert
New measure
Quick measure
Calculations
Publish
Share
Actual Amount
53.64bn
Contoso Actual Sales Results
Sales Amount by Location
Amount
5bn
4bn
3bn
2bn
1bn
0bn
EntityName
Year, QuarterFu...
2015
2016
2017
2018
2019
2020
Monthly Amount
20bn
10bn
0bn
Home Appliances
Computers
Cameras and camcorders
TV and Video
Cell phones
Audio
Music, Movies and Audio Books
Games and Toys
ProductCategoryName
Filters
Visualizations
Axis
EntityName
Legend
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Value
Amount
Tooltips
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Drill through
Cross-report
Off
Keep all filters
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DimProductCateg...
DimScenario
FactStrategyPlan
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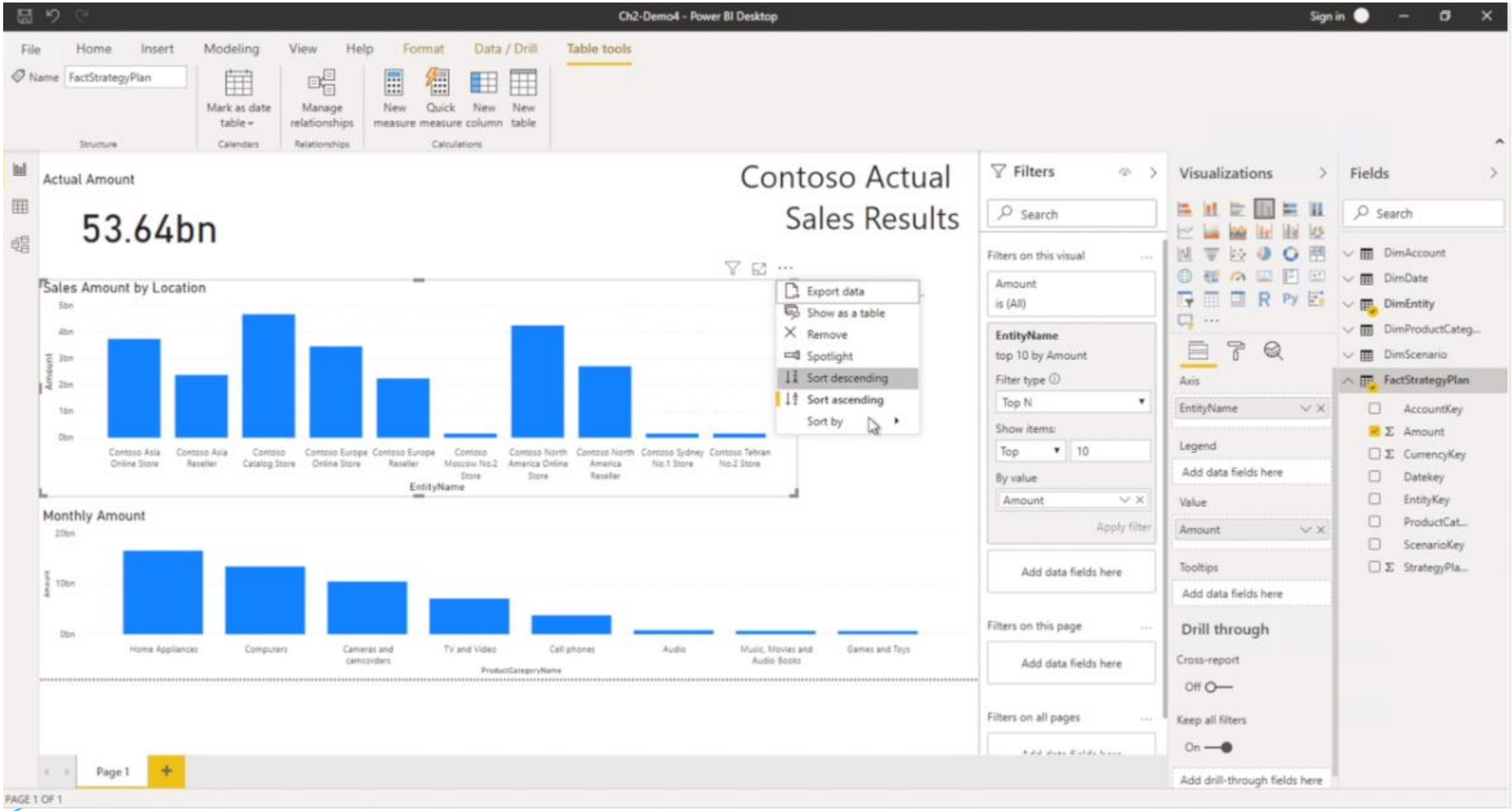
Ch2-Demo4 - Power BI Desktop
Sign in
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Table tools
Name
FactStrategyPlan
Mark as date table
Manage relationships
New measure
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New column
New table
Structure
Calendars
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Actual Amount
53.64bn
Contoso Actual Sales Results
Sales Amount by Location
Export data
Show as a table
Remove
Spotlight
Sort descending
Sort ascending
Sort by
Amount
EntityName
Contoso Asia Online Store
Contoso Asia Reseller
Contoso Catalog Store
Contoso Europe Online Store
Contoso Europe Reseller
Contoso Moscow No.2 Store
Contoso North America Online Store
Contoso North America Reseller
Contoso Sydney No.1 Store
Contoso Tehran No.2 Store
Monthly Amount
Home Appliances
Computers
Cameras and camcorders
TV and Video
Cell phones
Audio
Music, Movies and Audio Books
Games and Toys
ProductCategoryName
Filters
Search
Filters on this visual
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is (All)
EntityName
top 10 by Amount
Filter type
Top N
Show items:
Top
10
By value
Amount
Apply filter
Add data fields here
Filters on this page
Add data fields here
Filters on all pages
Visualizations
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Legend
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Add drill-through fields here
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DimAccount
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DimEntity
DimProductCateg...
DimScenario
FactStrategyPlan
AccountKey
Amount
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EntityKey
ProductCat...
ScenarioKey
StrategyPla...
Page 1
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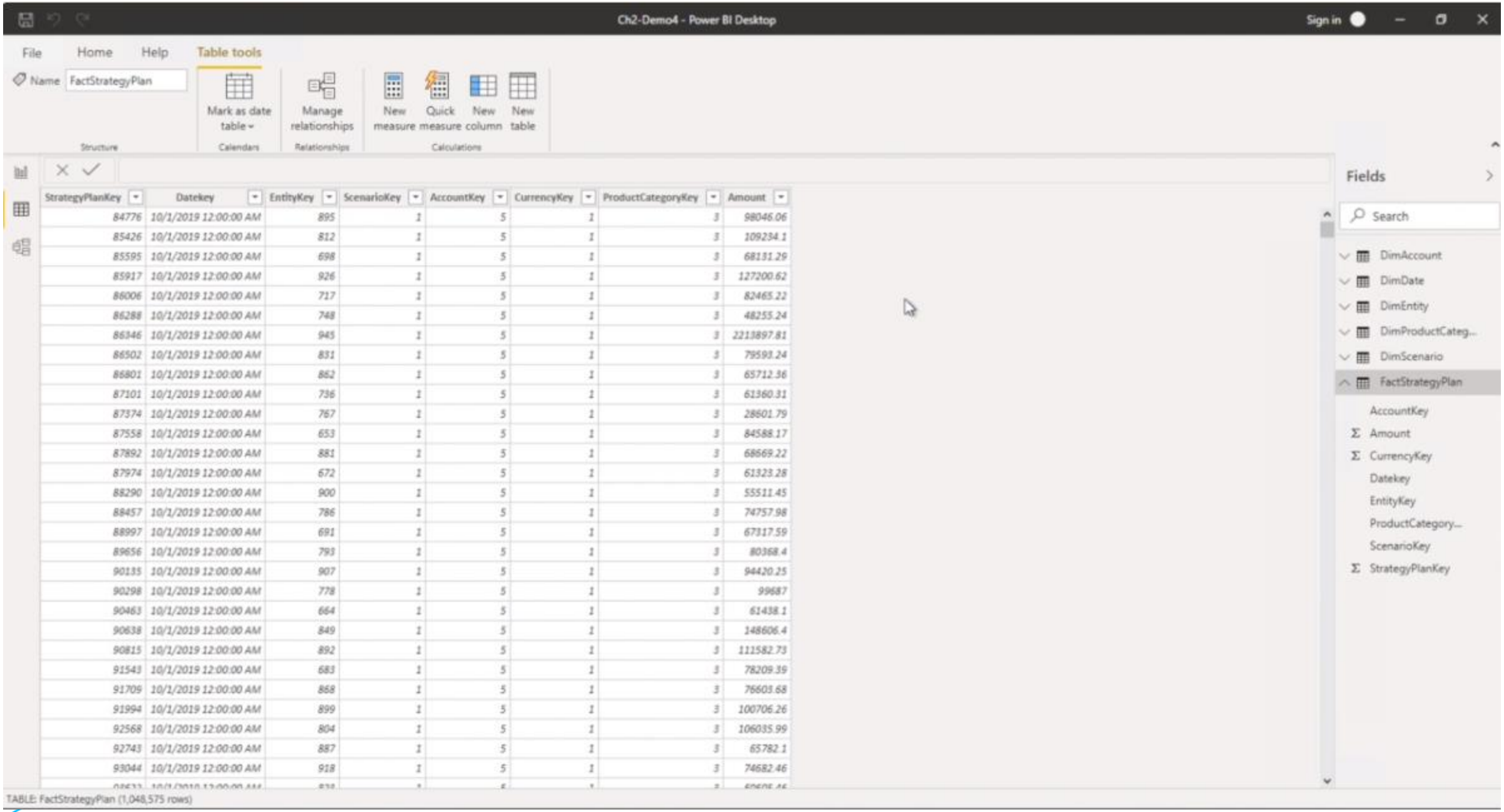

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85426	10/1/2019 12:00:00 AM	812	1	5	1	3	109234.1
85595	10/1/2019 12:00:00 AM	698	1	5	1	3	68131.29
85917	10/1/2019 12:00:00 AM	926	1	5	1	3	127200.62
86006	10/1/2019 12:00:00 AM	717	1	5	1	3	82465.22
86288	10/1/2019 12:00:00 AM	748	1	5	1	3	48255.24
86346	10/1/2019 12:00:00 AM	945	1	5	1	3	2213897.81
86502	10/1/2019 12:00:00 AM	831	1	5	1	3	79593.24
86801	10/1/2019 12:00:00 AM	862	1	5	1	3	65712.36
87101	10/1/2019 12:00:00 AM	736	1	5	1	3	61360.31
87374	10/1/2019 12:00:00 AM	767	1	5	1	3	28601.79
87558	10/1/2019 12:00:00 AM	653	1	5	1	3	84588.17
87892	10/1/2019 12:00:00 AM	881	1	5	1	3	68569.22
87974	10/1/2019 12:00:00 AM	672	1	5	1	3	61323.28
88290	10/1/2019 12:00:00 AM	900	1	5	1	3	55511.45
88457	10/1/2019 12:00:00 AM	786	1	5	1	3	74757.98
88997	10/1/2019 12:00:00 AM	691	1	5	1	3	67317.59
89656	10/1/2019 12:00:00 AM	793	1	5	1	3	80368.4
90135	10/1/2019 12:00:00 AM	907	1	5	1	3	94420.25
90298	10/1/2019 12:00:00 AM	778	1	5	1	3	99687
90463	10/1/2019 12:00:00 AM	664	1	5	1	3	61438.1
90638	10/1/2019 12:00:00 AM	849	1	5	1	3	148606.4
90815	10/1/2019 12:00:00 AM	892	1	5	1	3	111582.73
91543	10/1/2019 12:00:00 AM	683	1	5	1	3	78209.39
91709	10/1/2019 12:00:00 AM	868	1	5	1	3	76603.68
91994	10/1/2019 12:00:00 AM	899	1	5	1	3	100706.26
92568	10/1/2019 12:00:00 AM	804	1	5	1	3	106035.99
92743	10/1/2019 12:00:00 AM	887	1	5	1	3	65782.1
93044	10/1/2019 12:00:00 AM	918	1	5	1	3	74682.46

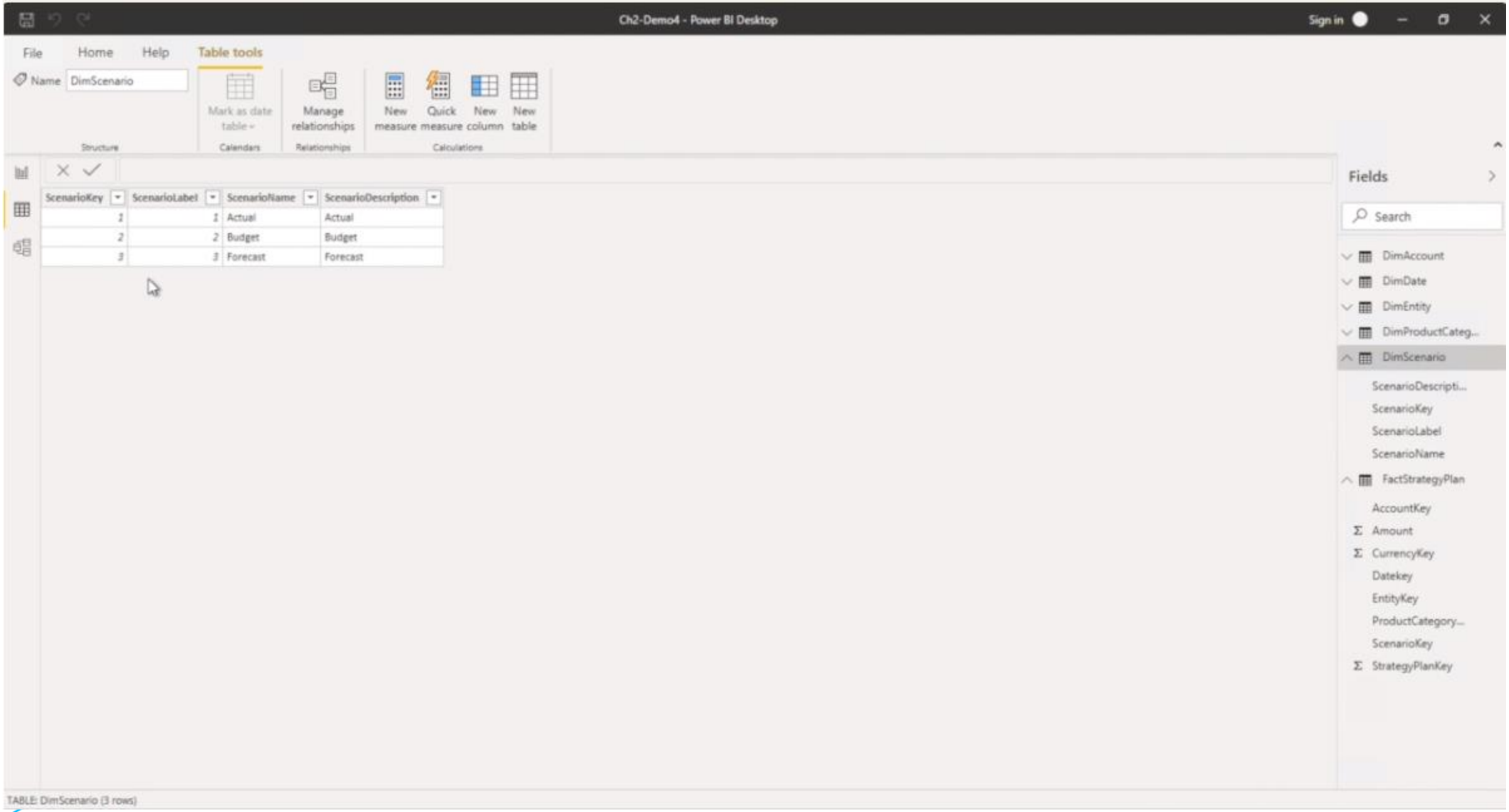
Ch2-Demo4 - Power BI Desktop
Sign in
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Table tools
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Manage relationships
New measure
Quick measure
New column
New table
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Calculations
ScenarioKey
ScenarioLabel
ScenarioName
ScenarioDescription
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Actual
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Forecast
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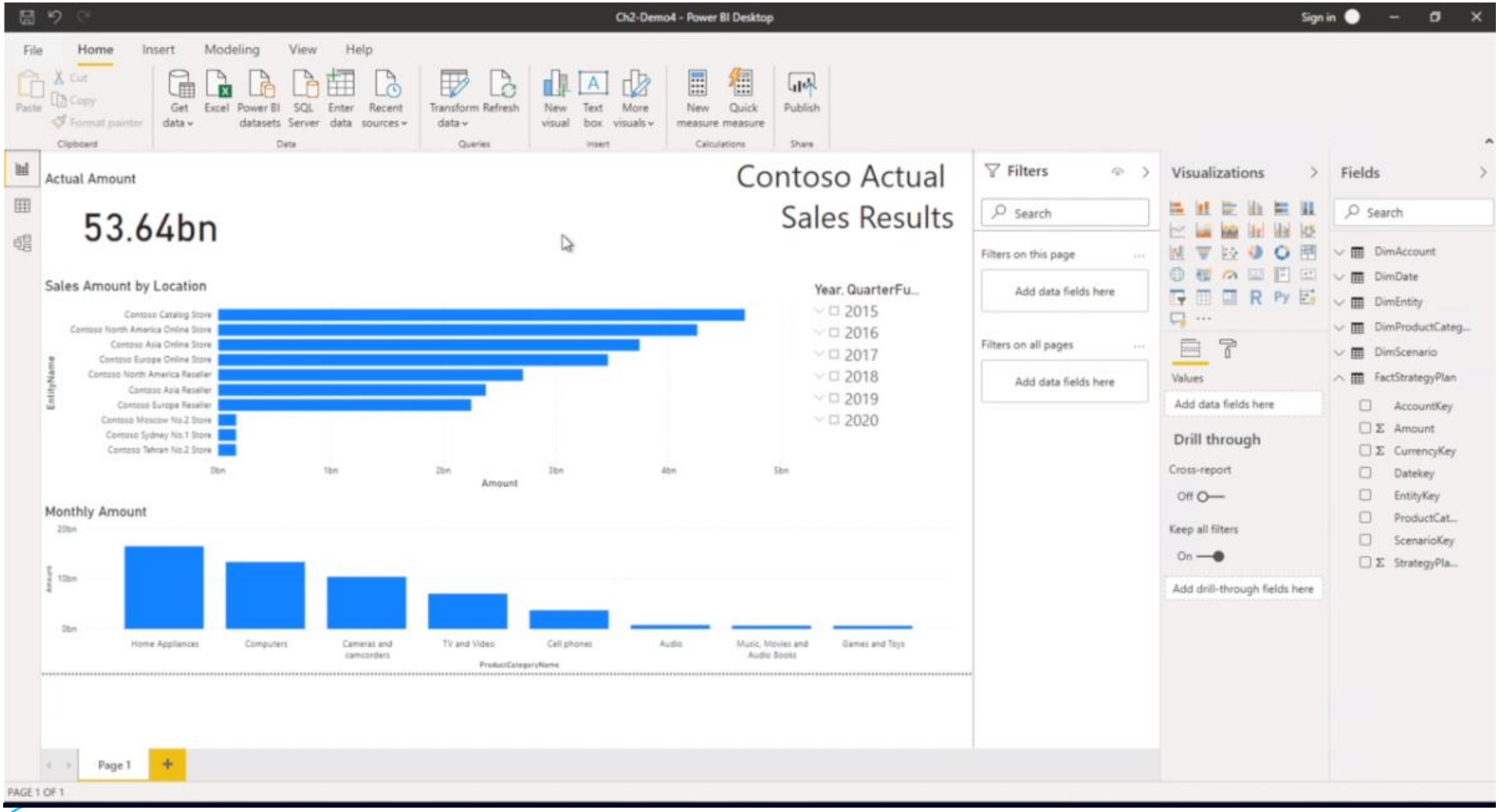
ProductCategory...
ScenarioKey
StrategyPlanKey
TABLE: DimScenario (3 rows)


Ch2-Demo4 - Power BI Desktop
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Power BI datasets
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More visuals
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New measure
Quick measure
Calculations
Publish
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Actual Amount
53.64bn
Contoso Actual Sales Results
Sales Amount by Location
Contoso Catalog Store
Contoso North America Online Store
Contoso Asia Online Store
Contoso Europe Online Store
Contoso North America Reseller
Contoso Asia Reseller
Contoso Europe Reseller
Contoso Moscow No.2 Store
Contoso Sydney No.1 Store
Contoso Tehran No.2 Store
EntityName
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2015
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2018
2019
2020
Monthly Amount
20bn
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Home Appliances
Computers
Cameras and camcorders
TV and Video
Cell phones
Audio
Music, Movies and Audio Books
Games and Toys
ProductCategoryName
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DimEntity
DimProductCateg...
DimScenario
FactStrategyPlan
AccountKey
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EntityKey
ProductCat...
ScenarioKey
StrategyPla...
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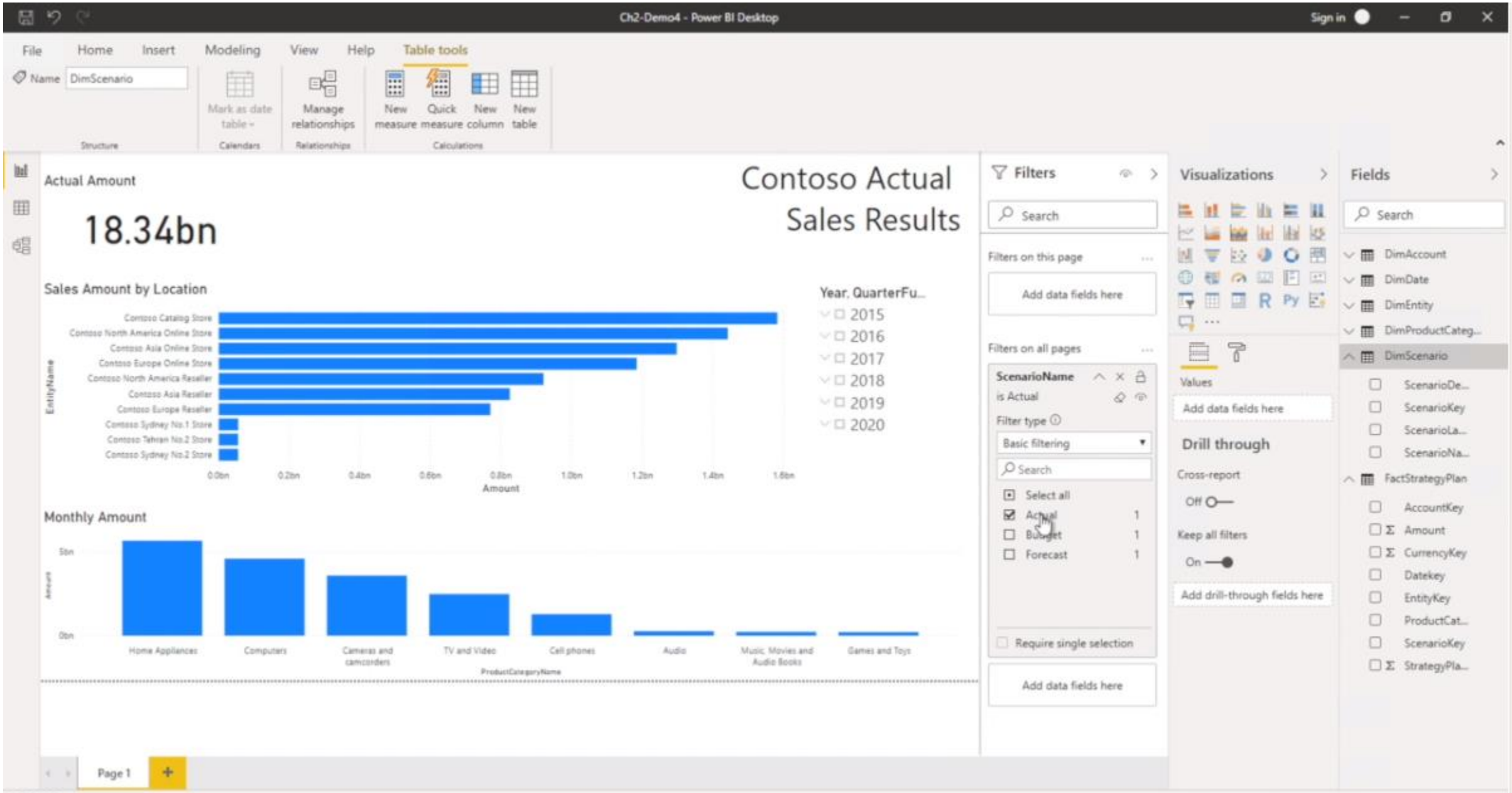
Ch2-Demo4 - Power BI Desktop
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Help
Table tools
Name
DimScenario
Mark as date table
Manage relationships
New measure
Quick measure
New column
New table
Structure
Calendars
Relationships
Calculations
Actual Amount
18.34bn
Contoso Actual Sales Results
Sales Amount by Location
Contoso Catalog Store
Contoso North America Online Store
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Contoso Europe Online Store
Contoso North America Reseller
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Contoso Europe Reseller
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Contoso Tehran No.2 Store
Contoso Sydney No.2 Store
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Amount
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Cell phones
Audio
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Games and Toys
ProductCategoryName
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Filters
Search
Filters on this page
Add data fields here
Filters on all pages
ScenarioName
is Actual
Filter type
Basic filtering
Search
Select all
Actual 1
Budget 1
Forecast 1
Require single selection
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DimScenario
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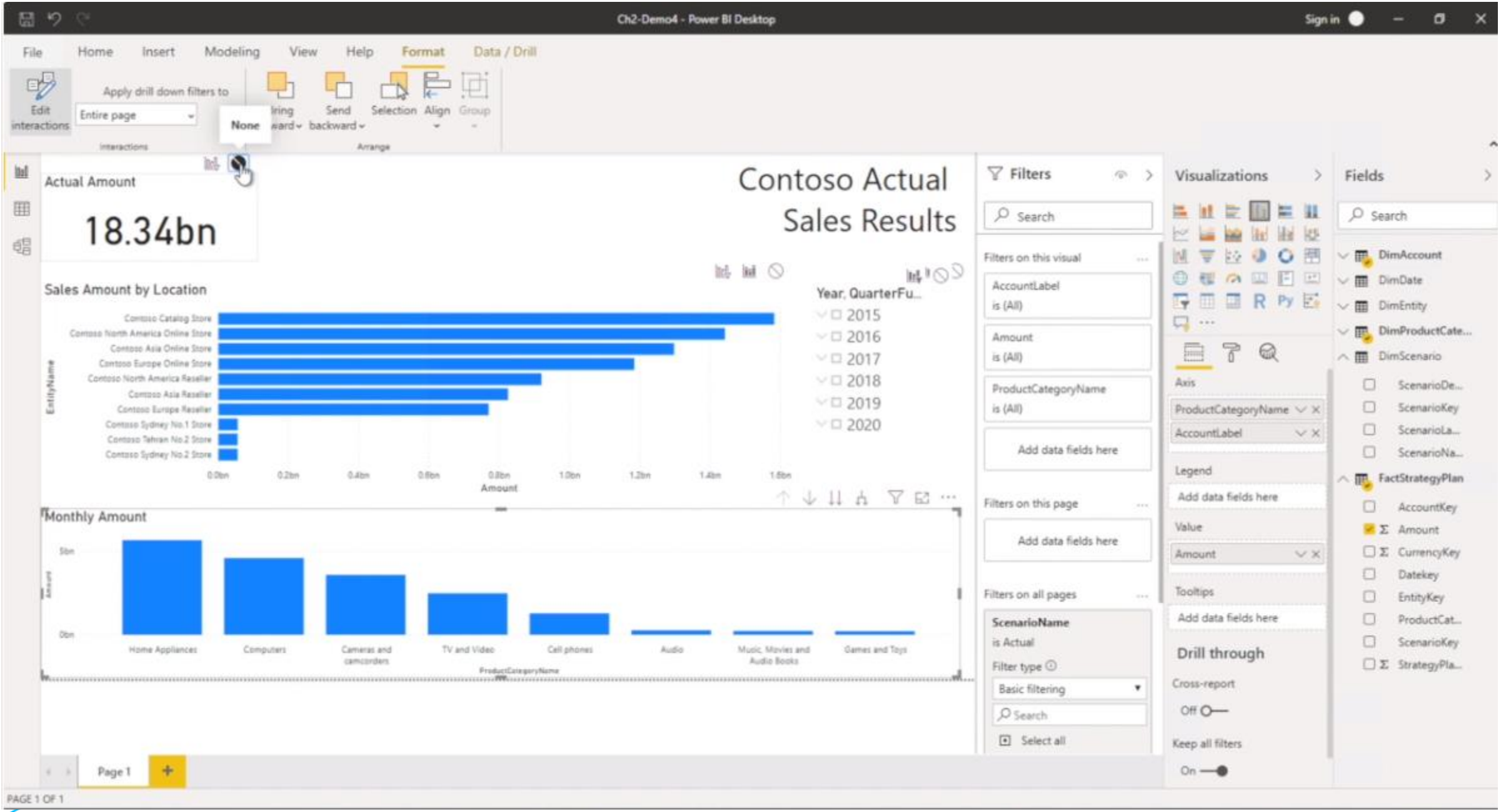
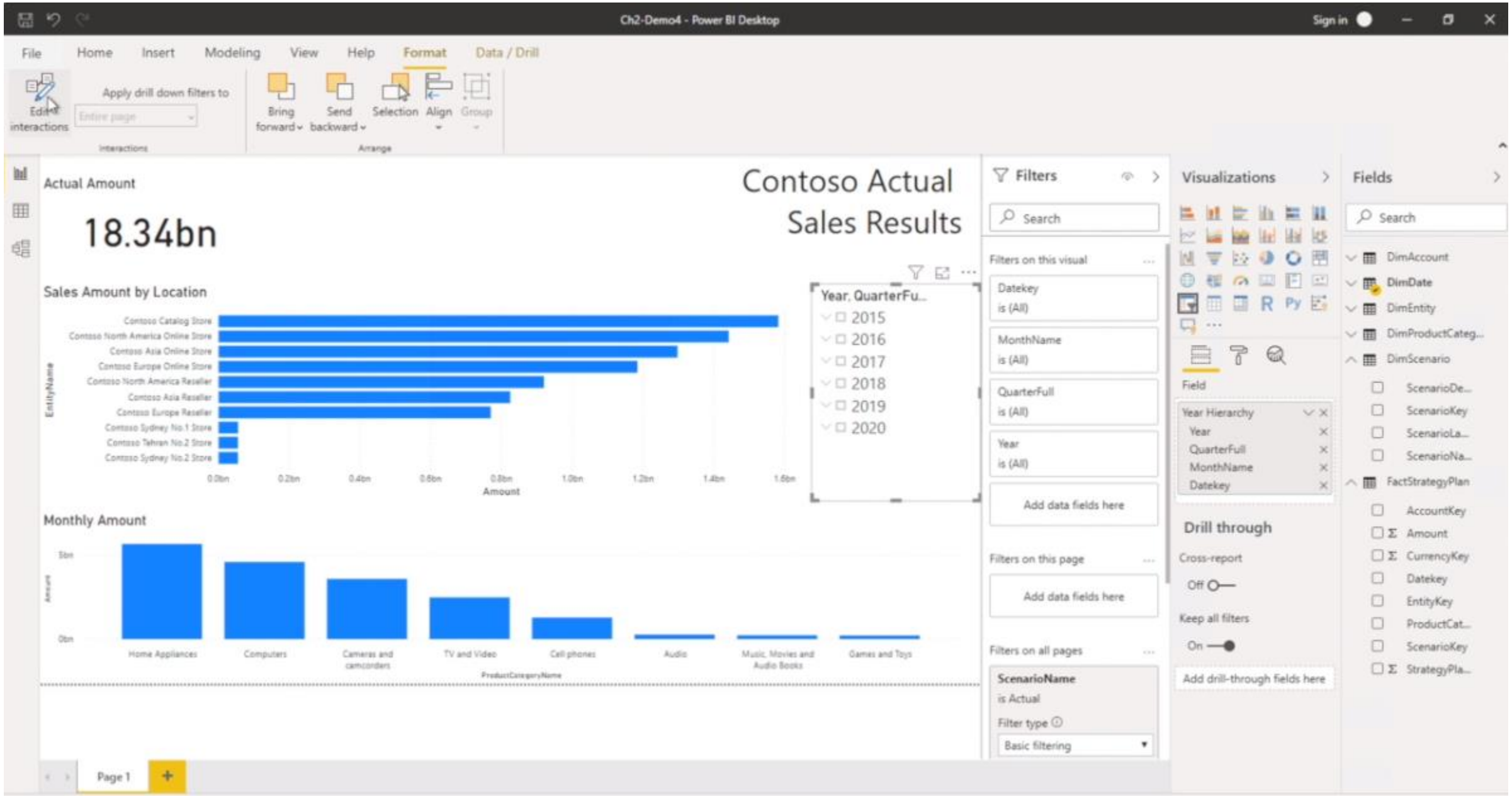
Amount
CurrencyKey
Datekey
EntityKey
ProductCat...
ScenarioKey
StrategyPla...


Ch2-Demo4 - Power BI Desktop
Sign in
File
Home
Insert
Modeling
View
Help
Format
Data / Drill
Edit interactions
Apply drill down filters to
Entire page
None
Send backward
Selection
Align
Group
Interactions
Arrange
Actual Amount
18.34bn
Contoso Actual Sales Results
Sales Amount by Location
Contoso Catalog Store
Contoso North America Online Store
Contoso Asia Online Store
Contoso Europe Online Store
Contoso North America Reseller
Contoso Asia Reseller
Contoso Europe Reseller
Contoso Sydney No.1 Store
Contoso Tehran No.2 Store
Contoso Sydney No.2 Store
EntityName
Amount
Year, QuarterFu...
2015
2016
2017
2018
2019
2020
Monthly Amount
5bn
0bn
Home Appliances
Computers
Cameras and camcorders
TV and Video
Cell phones
Audio
Music, Movies and Audio Books
Games and Toys
ProductCategoryName
Filters
Search
Filters on this visual
AccountLabel
is (All)
Amount
is (All)
ProductCategoryName
is (All)
Add data fields here
Filters on this page
Add data fields here
Filters on all pages
ScenarioName
is Actual
Filter type
Basic filtering
Search
Select all
Visualizations
Axis
ProductCategoryName
AccountLabel
Legend
Add data fields here
Value
Amount
Tooltips
Add data fields here
Drill through
Cross-report
Off
Keep all filters
On
Fields
Search
DimAccount
DimDate
DimEntity
DimProductCate...
DimScenario
ScenarioDe...
ScenarioKey
ScenarioLa...
ScenarioNa...
FactStrategyPlan
AccountKey
Amount
CurrencyKey
Datekey
EntityKey
ProductCat...
ScenarioKey
StrategyPla...
Page 1
PAGE 1 OF 1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Data / Drill
Edit interactions
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Entire page
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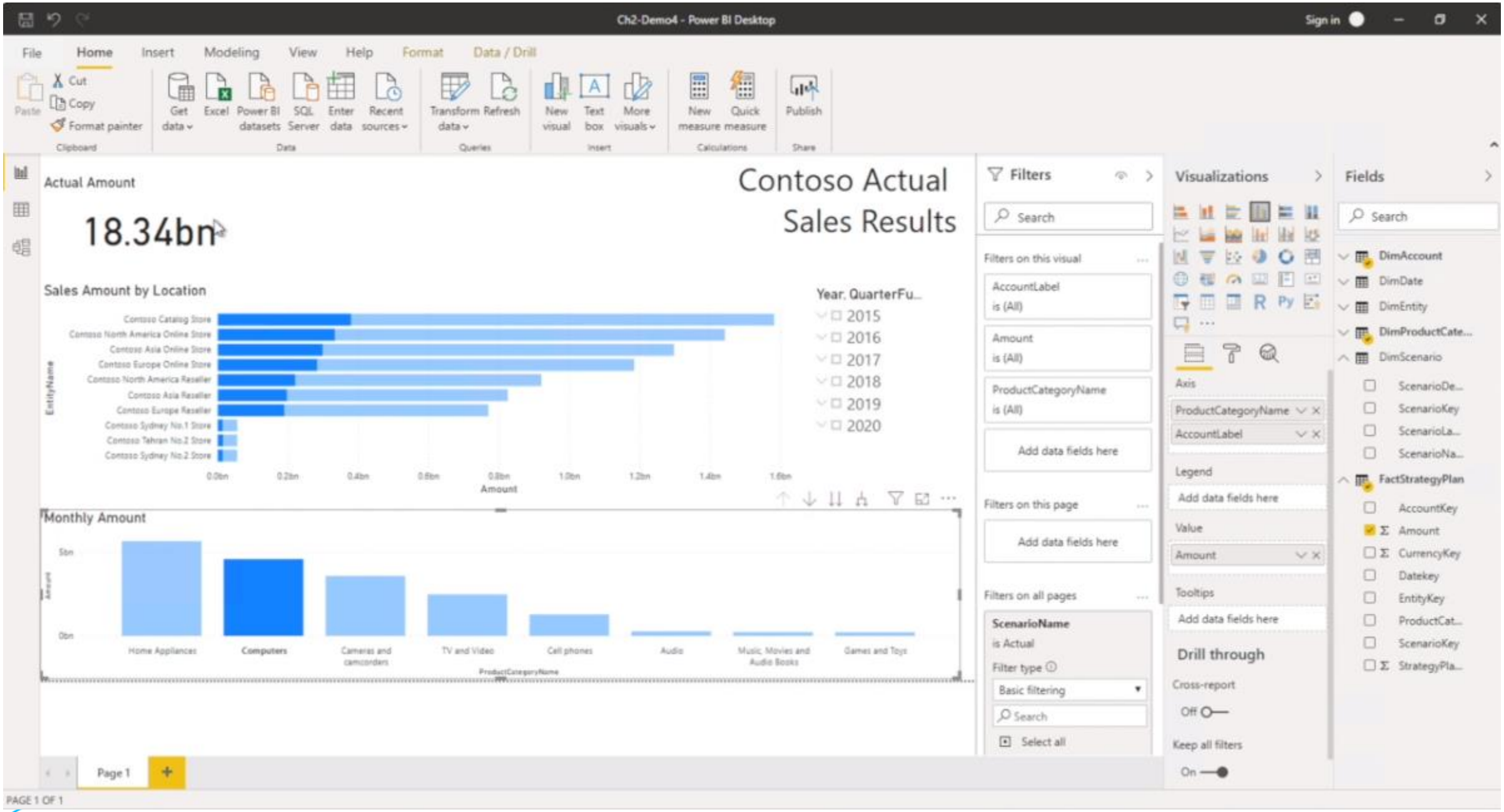
Contoso Europe Online Store
Contoso North America Reseller
Contoso Asia Reseller
Contoso Europe Reseller
Contoso Sydney No.1 Store
Contoso Tehran No.2 Store
Contoso Sydney No.2 Store
EntityName
0.0bn
0.2bn
0.4bn
0.6bn
0.8bn
1.0bn
1.2bn
1.4bn
1.6bn
Amount
Year, QuarterFu...
2015
2016
2017
2018
2019
2020
Monthly Amount
5bn
0bn
Amount
Home Appliances
Computers
Cameras and camcorders
TV and Video
Cell phones
Audio
Music, Movies and Audio Books
Games and Toys
ProductCategoryName
Page 1
PAGE 1 OF 1
Filters
Search
Filters on this visual
Datekey
is (All)
MonthName
is (All)
QuarterFull
is (All)
Year
is (All)
Add data fields here
Filters on this page
Add data fields here
Filters on all pages
ScenarioName
is Actual
Filter type
Basic filtering
Visualizations
Field
Year Hierarchy
Year
QuarterFull
MonthName
Datekey
Drill through
Cross-report
Off
Keep all filters
On
Add drill-through fields here
Fields
Search
DimAccount
DimDate
DimEntity
DimProductCateg...
DimScenario
ScenarioDe...
ScenarioKey
ScenarioLa...
ScenarioNa...
FactStrategyPlan
AccountKey
Amount
CurrencyKey
Datekey
EntityKey
ProductCat...
ScenarioKey
StrategyPla...


Ch2-Demo4 - Power BI Desktop
Sign in
File
Home
Insert
Modeling
View
Help
Format
Data / Drill
Cut
Copy
Format painter
Paste
Clipboard
Get data
Excel
Power BI datasets
SQL Server
Enter data
Recent sources
Data
Transform data
Refresh
Queries
New visual
Text box
More visuals
Insert
New measure
Quick measure
Calculations
Publish
Share
Actual Amount
18.34bn
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Contoso Europe Reseller
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Contoso Tehran No.2 Store
Contoso Sydney No.2 Store
EntityName
0.0bn
0.2bn
0.4bn
0.6bn
0.8bn
1.0bn
1.2bn
1.4bn
1.6bn
Amount
Year, QuarterFu...
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2016
2017
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2020
Monthly Amount
5bn
0bn
Amount
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Cameras and camcorders
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Filters on this visual
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ProductCategoryName
is (All)
Add data fields here
Filters on this page
Add data fields here
Filters on all pages
ScenarioName
is Actual
Filter type
Basic filtering
Search
Select all
Visualizations
Axis
ProductCategoryName
AccountLabel
Legend
Add data fields here
Value
Amount
Tooltips
Add data fields here
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Cross-report
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Keep all filters
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DimEntity
DimProductCate...
DimScenario
ScenarioDe...
ScenarioKey
ScenarioLa...
ScenarioNa...
FactStrategyPlan
AccountKey
Amount
CurrencyKey
Datekey
EntityKey
ProductCat...
ScenarioKey
StrategyPla...

Filtering is an important tool when you're creating Power BI reports. You don't always want to look at all of the data. Limiting the data used in visuals to only a selection that is relevant can help you answer more detailed business questions.

In the report, you can see that the cards on the `Sales Analysis` page tab are labeled `Actual`, `Forecast`, and `Budget`, but they all have the same values. You'll need to apply some filters to fix this.

Close any open reports and open the `4_3_adding_a_filter.pbix` report from the `Exercises` folder on the desktop.

- Open the *Filters* pane.
- Add a filter to the "Actual" card visual that filters on rows where `ScenarioName` is equal to `Actual`.

Add a filter to the "Forecast" card visual that filters on rows where `ScenarioName` is equal to `Forecast`.

Add a filter to the "Budget" card visual that filters on rows where `ScenarioName` is equal to `Budget`.

Question: What was the total forecasted amount?

- 53.64bn
- 18.34bn
- 18.13bn
- 17.17bn

By default, visualizations on a report page can be used to cross-filter the other visualizations on the page. Sometimes, you want to disable this functionality and keep a chart static regardless of what selections have been made elsewhere in the report. Let's turn off those interactions! Note that you might have to temporarily move a visual to be able to see the circle with the line through it.

In this report, we want to make sure the Actual, Forecast, and Budget cards don't change when other elements are selected.

If you lost progress, close any open reports and load `4_4_turning_off_interactions.pbix` from the `Exercises` folder on the desktop.

Select the "Budget Product Sold" visual.

Go into the interaction editing mode in the *Format* tab at the top of the screen.

Turn off interactions with each of the three cards.

Exit the interaction editing mode.

Select the "TV and Video" bar in the "Budget Product Sold" chart. What is the value of the Budget card? (format example: 11.11bn)

THANK YOU !!