



## Intro to Power BI

This page provides high-level details for the more commonly used features and functionality of Power BI at Krispy Krunchy Foods.

### Features covered in this training:

- How to Navigate the Power BI Portal
  - Home Page
  - Workspaces
- How to Navigate within a Power BI Dashboard
  - Action Bar
  - Pages Panel
  - Filters Panel
  - Page Features

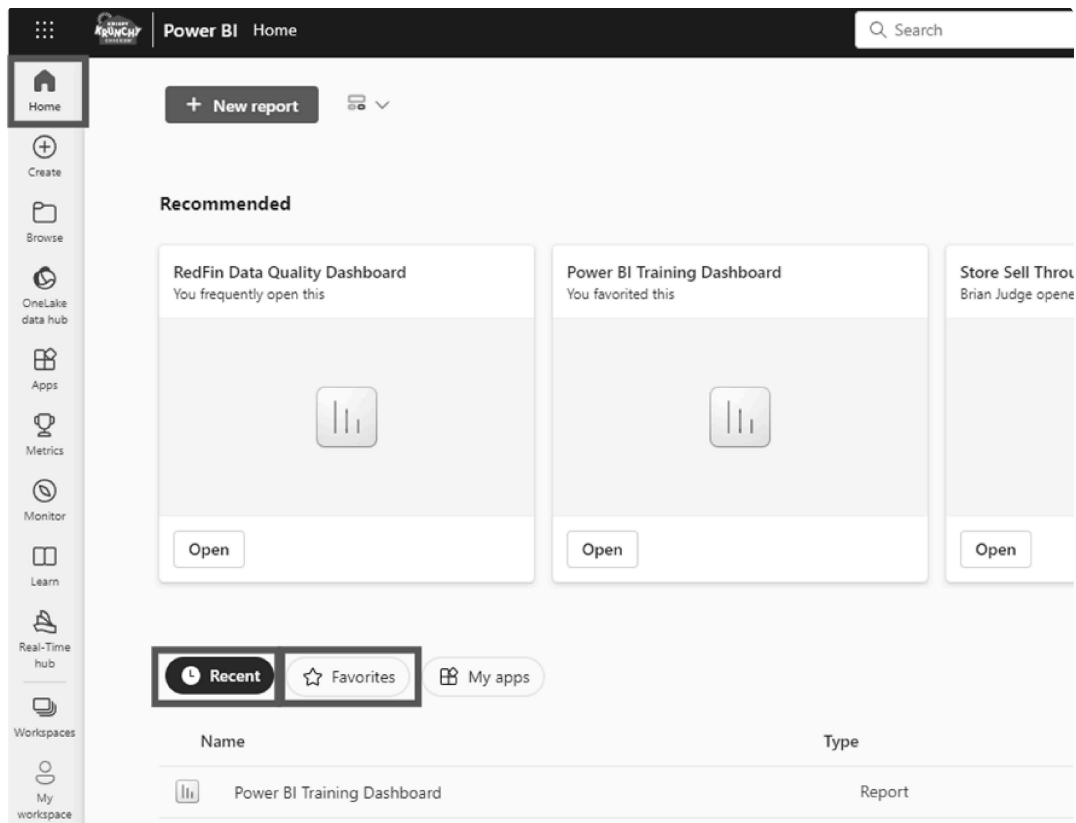
## How to Navigate the Power BI Portal

### Home Page

The Home Page is the landing page when you log into the Power BI portal. This is where you can view recent Power BI dashboards that you have viewed previously, as well as navigate to the Workspaces that you have access to

## Home Page Features:

- Recent
- Favorites



## Recent

Displays a list of dashboards that the user recently viewed

## Favorites

Displays a list of dashboards that the user marked as their favorite

## Workspaces

Workspaces are collections of Power BI dashboards, think of workspaces as folders

## List of Workspaces:

- **Data Quality** - Contains dashboards that showcase all of the data that we have collected within our data warehouse for reporting purposes based on the source of the data
- **Krispy Krunchy Dashboards** - Contains dashboards that are live / in production that are ready for use
- **Krispy Krunchy Test** - Contains dashboards that are in UAT (user acceptance testing). When a dashboard within this workspace is approved by the dashboard owner, it will be moved to the Krispy Krunchy Dashboard workspace

# How to Navigate within a Power BI Dashboard

## Action Bar

The Action Bar contains features that users can use to export, share, comment and more

## Action Bar Features:

- Export
- Share
- Chat In Teams
- Refresh Filters
- Bookmarks
- Refresh
- Comment
- Favorite

## Export

Allows user to export the entire dashboard or just the current page being displayed

### Export Options:

- Excel
- PowerPoint
- PDF

## Export to Excel

Exports all the data within the Power BI dashboard into Excel. The data can then be used in Excel to build reports

## Export to PowerPoint

Exports the Power BI dashboard into PowerPoint

### Export Options:

- **Embed live data** – Exports the Power BI dashboard into an interactive PowerPoint.
- **Export as image** – Exports each page within the Power BI dashboard into a PowerPoint page
  - **Current Values** – Exports the data with the current filter / slicer selection(s)
  - **Default Values** – Exports the data with the no filter / slicer selections

## Export to PDF

Exports the Power BI dashboard into a PDF

### Export Options:

- **Current Values** – Exports the data with the current filter / slicer selection(s)
- **Default Values** – Exports the data with the no filter / slicer selections

## Share

Allows user to share the dashboard with other Krispy Krunchy employees

### Share Options:

- **Link** - Allows the user to copy and send a link to the dashboard based on their sending preference
- **Email** - Allows the user to send an email to someone that will direct the new user to the dashboard within Power BI
- **Chat in Teams** - Allows the user to send a Teams chat to someone that will direct the new user to the dashboard within Power BI



- **Power Point** - Allows the user to copy and send a PDF version of the dashboard based on their sending preference

## Chat In Teams

Another away for the user to be able to share the dashboard via Teams

## Refresh Filters

Only appears if the user has made filter selections, different from the default filters, within the dashboard

## Bookmarks

Allow the user to open the Bookmark panel, located on the right side of the screen

### Bookmarks Types:

- **Personal** - Allows users to add their own bookmarks, which is a collection of filters made by the user
- **Report** - These are bookmarks made by the developers on the dashboard. Users can use these bookmarks from the bookmarks panel
  - Each of these bookmarks are tied to interactive buttons found within the dashboard

## Refresh

Allows the user to refresh the dashboard at any time to ensure that the data being displayed is up to date

If the user has a Power BI dashboard open in a browser tab when the dashboard is being updated, the user will not see the updated data

The user will have to either:

- Close and reopen the dashboard

- Refresh the browser page
- Click the refresh button located on the right side in the action bar

## Comment

Allows the user to post comments on the dashboard so that other users can see

@mentions can be used to tag certain other users and notify them of your comment(s)

## Favorite

Allows the user to favorite the dashboard, making it appear in the user's Favorites section on the Power BI home page

## Pages Panel

The Pages Panel displays all the pages that make up the dashboard. This is where users will navigate between each page within the dashboard

### Pages Panel Features:

- Home Page
- Glossary
- Additional Pages

## Home Page

Each dashboard will have a Home Page, which displays the:

- **Dashboard Title** – Displays the title of the Power BI dashboard

- **Dashboard Metric(s)** – This could be store counts or product counts within the dashboard, as well as dates that are being included within the dashboard
- **Select a Page Below (Interactive Buttons)** – for each page that the user can use to navigate to the page of their choosing
- **Page Summary** – Informs the user on what data and insights they will see within each page
- **Dashboard Notes** – informs the user on the refresh schedule of the dashboard, as well as any other important notes pertaining to the dashboard

## Glossary

Each dashboard will have a Glossary page, which displays a table containing all of the fields (Columns) that the user may see within the dashboard, along with definitions for each field and any formulas used if applicable



## Additional Pages

These pages will be different depending on the dashboard and will be where users go to derive insights from the dashboard

Pages Panel: Additional Pages Image 1 of 2

## Filters Panel

The Filters Panel displays any filters that the developer(s) used when building out specific pages and/or visuals, if any

There may not be any filters used by the developer(s) for certain reports. Instead, the filtering is left up to the end-user by utilizing the slicers at the top of the page

## Page Features

Page Features allow the user to interact with visuals on the page to filter the results, reaggregate the data and even decide which visuals to display and which ones to hide

### Page Features:

- Field Slicers / Filters
- Buttons
- Focus Mode
- More Options
- Sorting
- Selecting

### Field Slicers / Filters

Allows the user to customize the data being shown within the visuals

## Buttons

Allow the user to clear filters or choose which visuals to display

### Button Types:

- **Clear Filters** - This button allows the user to clear all filters on the page to their default setting
- **Other Buttons** - These buttons allow the user to display the visual(s) of their choosing within a single page

## Focus Mode

Enlarges the visual if the end user wants to hide all other visuals, or only be able to look at the 1 single visual being focused

## More Options

Contains additional features that the user can use

### More Options Features:

- Share
- Add a Comment
- Export Data

## Share

Similar to the Share feature located in the action bar, this time the share is for the specific visual

### Share Types:

- **Link to this visual** - Allows the user to copy and send a link to the visual based on their sending preference
- **Chat in Teams** - Allows the user to send a Teams chat to someone that will direct the new user to the visual within Power BI
- **Open in PowerPoint** - Allows the user to open a PDF version of the visual

## Add a Comment

Allows the user to post comments on the visual within the dashboard so that other users can see



## Export Data

Allows the user to export the data within the visual

Export Types:

- **Data with Current Layout** - Exports the data as it is being shown within the visual, including the filters being applied at time of export

## Sorting

Allows the user to sort columns in ascending or descending order

## Selecting

Highlights a single selection for the user to be able to focus on the selection. Also adjust other visuals on the pages based on the selection made by the user. Select the selection again to unselect and reset the visual to display all data again

