

Creating a true self-service report ...

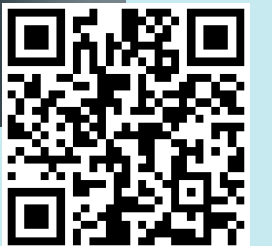
... Without Exporting to Excel

Kristoffer West & Just Blindbæk



Kristoffer West

- Head of Academy @ twoday capacity
- Senior Data Insights Consultant
- Data Nerd
- UX/UI enthusiast
- Winner of the prestigious “Power BI Shootout”



Just Blindbæk

- Principal Architect @ twoday kapacity
- Microsoft Data Platform MVP
- Found and organizer of
- Danish Microsoft BI Community (MsBIP.dk)
- Power BI UG Denmark (PowerBI.dk)
- Power BI Cruise, Power BI Next Step and Data Platform Next Step



Agenda



- Customize Visuals
- Numeric Range Parameters
- Fields Parameters
- Calculation Groups
- Power Automate



Why?

- We want users to stay in Power BI
- Limit the number of manual tasks for report consumers
- Work smarter not harder





Customize Visuals

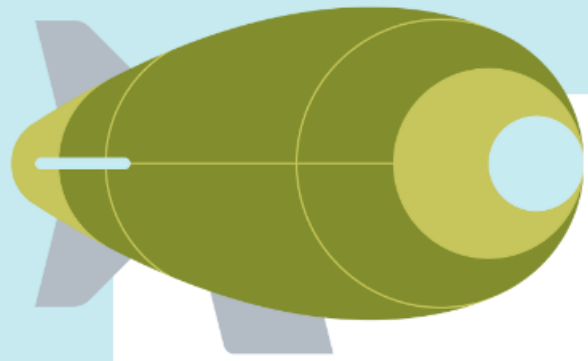


Personalize visuals

☐ Allow report readers to personalize visuals to suit their needs

- Allow users to customize visuals
- Perspectives





Pros and Cons

Good

- Full Customization

Bad

- Inexperienced users might not get the right result
- Could lead to a new Excel Hell
- **No one will ever find it**

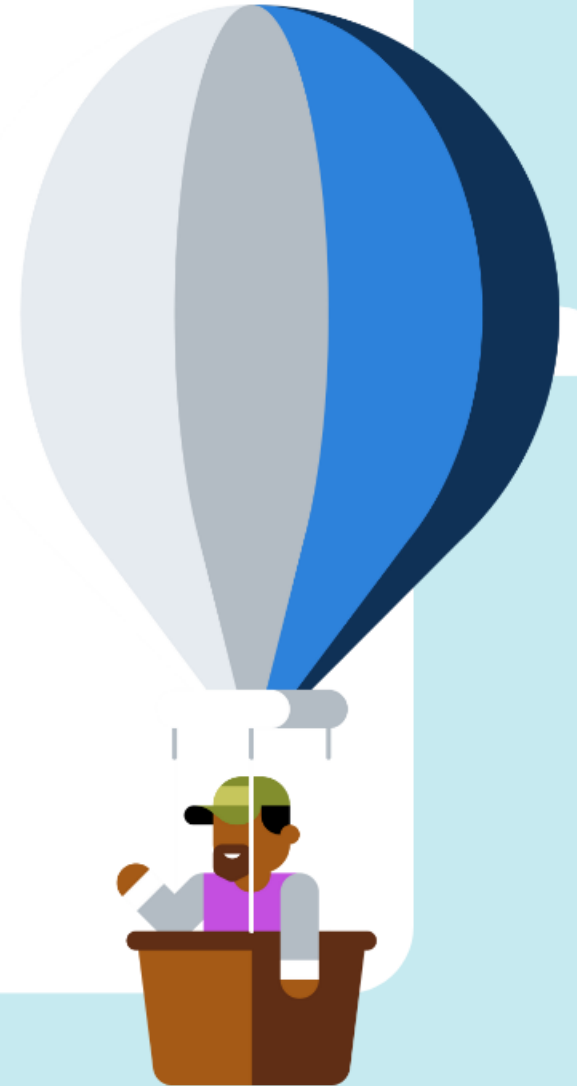


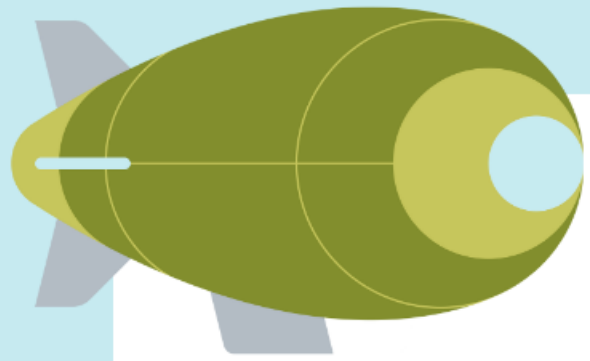


Numeric Range Parameters

Budget Deviation

2 %





Pros and Cons

Good

- Easy to use
- Can be reused in many scenarios

Bad

- Users cannot implement them selves
- There is a difference between “ & ”





Fields Parameters

Group, Fields Parameter

✓ ☐ Geography

^ ☐ Product

☐ Product Group Name

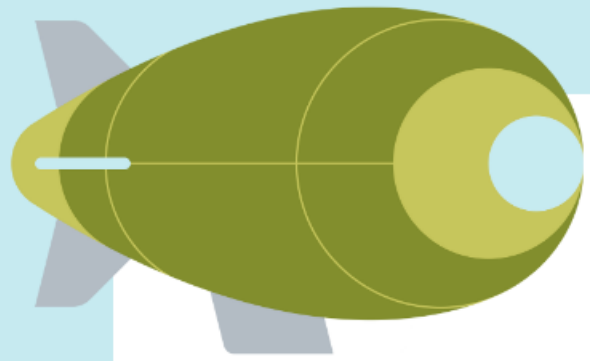
☐ Product Subgroup Name

☐ Product Name

✓ ☐ Retailer

✓ ☐ Sales Size





Pros and Cons

Good

- Easy to set up
- Can work with multiple visuals

Bad

- Users cannot implement them selves
- Limited customization



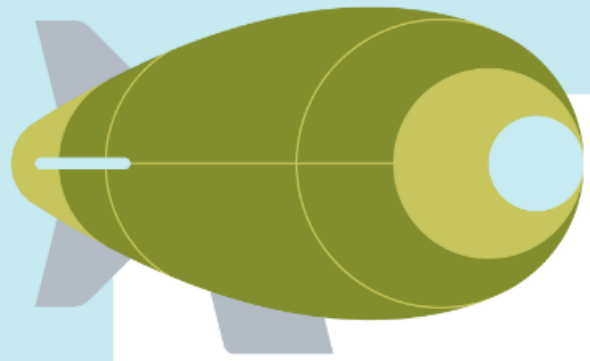
Calculation Groups

Name



- ☐ Current
- ☐ MTD
- ☐ QTD
- ☐ YTD





Pros and Cons

Good

- Can be reused in many scenarios
- Governed in the model

Bad

- Can be a little difficult to setup – e.g. “%”



Power Automate



Power BI templates you might like



Update an Excel table from Power BI

By Microsoft

Instant

118767



Send a Teams message from Power BI

By Microsoft

Instant

45206



Send an e-mail to any audience from Power BI

By Microsoft

Instant

5995



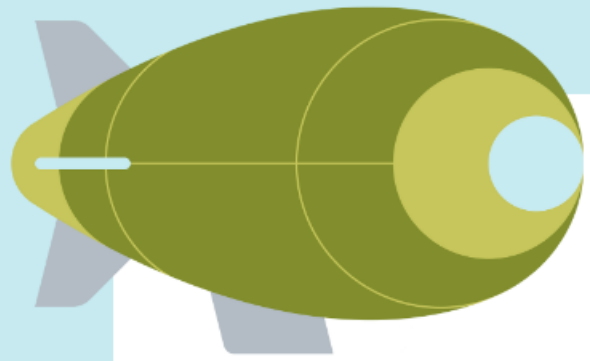
Create a task from Power BI

By Microsoft

Instant

4162





Pros and Cons

Good

- Actions right where you need them
- The report becomes a tool
- Works great with a Power App

Bad

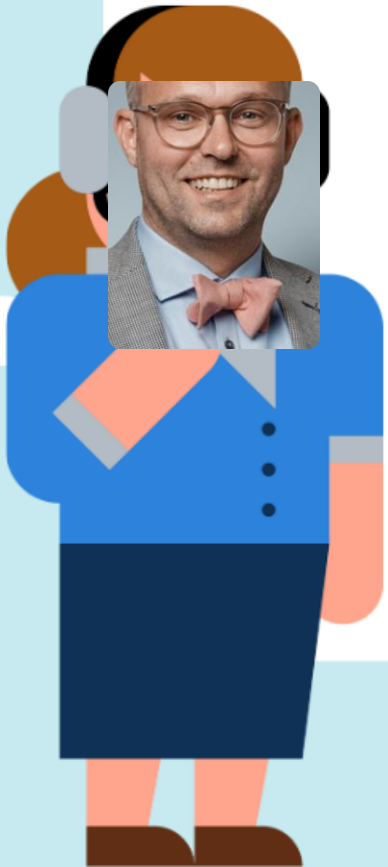
- Might require more licenses



Questions?

- Customize Visuals?
- Numeric Range Parameters?
- Fields Parameters?
- Calculation Groups?
- Power Automate?

Remember to
rate the
session



Links

[Perspectives](#)

[Single Select Value Column](#)

[Fields Parameters with Tabular Editor](#)

[Fields Parameter Grouping](#)