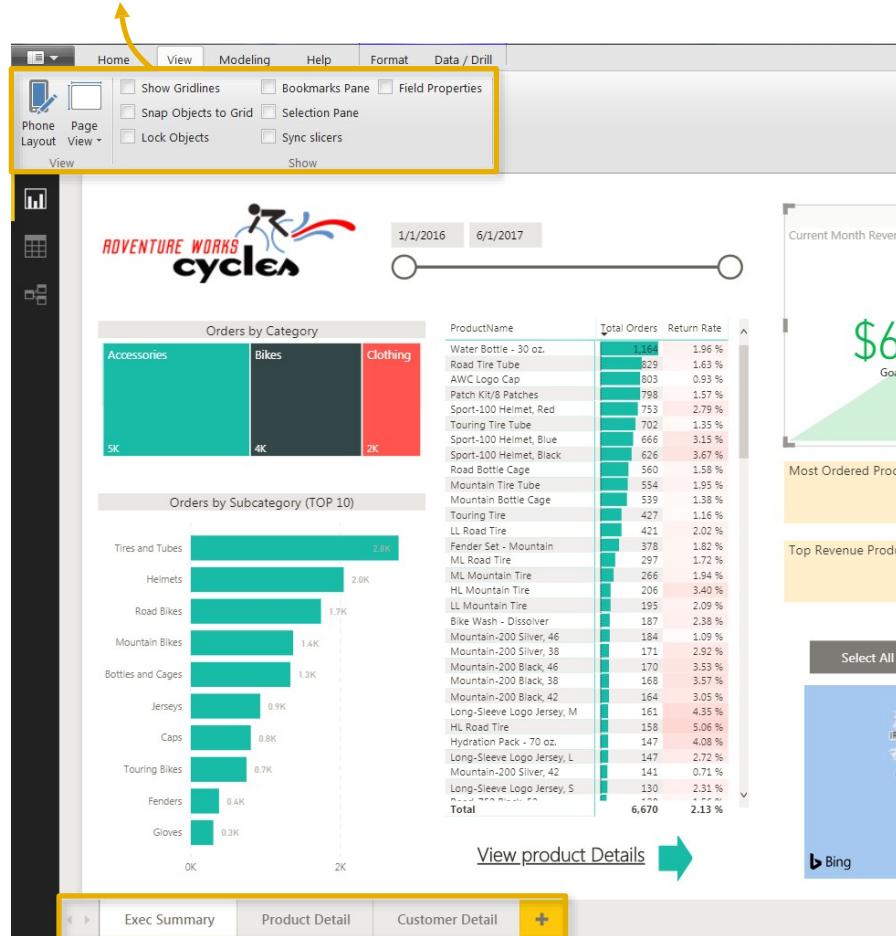


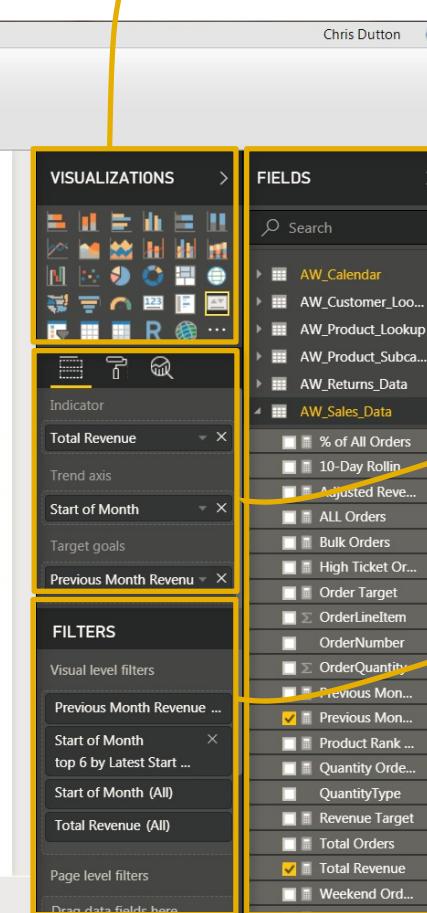
BUILDING REPORTS

THE POWER BI REPORT VIEW

“View” Options (Layout, Gridlines, Snap to Grid, Bookmarks/Selection Pane, etc)



Visualization Options (Charts, Slicers, Maps, Matrices, etc)



Field List (Tables, columns & measures)

Fields/Format/Analytics Pane
(Fields pane shown here)

Filters Pane (Visual-Level, Page-Level, Report-Level, and Drillthrough Filters)

Report Pages (Similar to Excel tabs; each is a blank reporting canvas)

INSERTING OBJECTS & BASIC CHARTS

The screenshot shows the Power BI desktop interface with the following components:

- Visualizations pane:** On the left, it displays various visualization icons. One icon (a bar chart) is highlighted with a yellow box.
- Fields pane:** This pane lists data fields and filters. It includes sections for **Values**, **FILTERS**, and **Report level filters**. A specific filter named "ALL Orders" is highlighted with a yellow box.
- Home tab ribbon:** At the top, the **Home** tab is selected. The **Insert** tab is highlighted with a yellow box. It contains options like **New Page**, **New Visual**, **Buttons**, **Text box**, **Image**, and **Shapes**.
- Canvas:** The main area shows two charts. The first is a blank chart template with a light gray background. The second is a bar chart titled "ALL Orders" with one teal bar reaching up to the 30K mark on the y-axis.

Click on a visualization type or use the “New Visual” option in the Home tab to insert a blank chart template (usually a column chart by default)

Note: You can also add **New Pages**, **Buttons**, **Text Boxes**, **Images** and **Shapes** from this menu

Drag fields or measures directly into the report canvas to automatically generate a new visual

FORMATTING OPTIONS

Example: Line & Column Chart



Example: Matrix

ProductName	Total Orders	Return Rate
Water Bottle - 30 oz.	1,164	1.96 %
Road Tire Tube	829	1.63 %
AWC Logo Cap	803	0.93 %
Patch Kit/8 Patches	798	1.57 %
Sport-100 Helmet, Red	753	2.79 %
Touring Tire Tube	702	1.35 %
Sport-100 Helmet, Blue	666	3.15 %
Sport-100 Helmet, Black	626	3.67 %
Road Bottle Cage	560	1.58 %
Mountain Tire Tube	554	1.95 %
Mountain Bottle Cage	539	1.38 %

Example: Donut Chart



Search

General

Legend On

X-Axis On (highlighted)

Y-Axis On

Data colors

Data labels Off

Shapes

Plot Area

Title On

Background Off

Lock aspect Off

Border Off

X-Axis settings:

- Type: Continuous
- Scale type: Linear
- Start: Auto
- End: Auto
- Color: Gray
- Text size: 11
- Font fam...: Segoe UI
- Display ...: Auto
- Value de...: Auto

Search

General

Matrix style

Grid

Column headers

Row headers

Values

Subtotals

Grand total

Field formatting

Conditional formatting (highlighted)

Conditional formatting settings:

- Total Orders
- Background: Off
- Font col...: Off
- Data bars: On

Search

General

Legend Off

Data colors

Detail labels On (highlighted)

Title On

Background Off

Lock aspect Off

Border Off

General

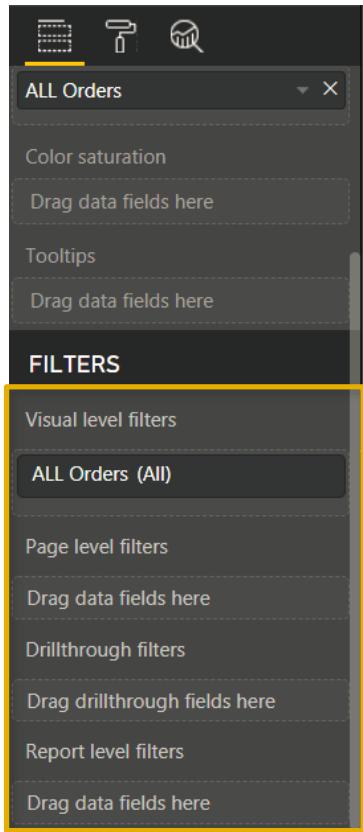
Detail labels settings:

- Label style: Category
- Color: Gray
- Display ...: Auto
- Text size: 9
- Font fam...: DIN
- Revert to default

Title settings:

- Title Text: Total Orders ...
- Font color: Gray
- Background color: White
- Alignment: Center
- Text size: 8
- Font fam...: Segoe UI
- Revert to default

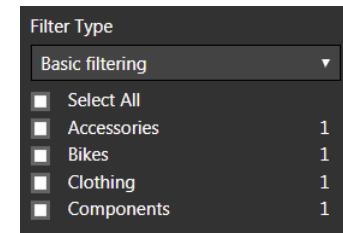
FILTERING OPTIONS



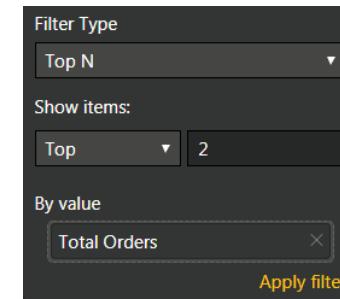
There are **four (x4)** primary filter types in Power BI reports:

- 1. Visual Level:** Applies only to the *specific visual* in which it is defined
- 2. Page Level:** Applies to *all visuals on the specific page* in which it is defined
- 3. Report Level:** Applies to *all visuals* across *all pages* of the report
- 4. Drillthrough:** Applies to *specific pages*, and *dynamically changes* based on user paths

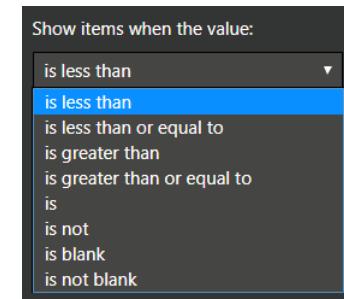
Filter settings include Basic, Advanced, and Top N options



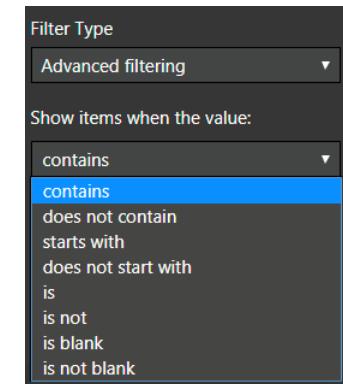
Basic Options



Top N Options

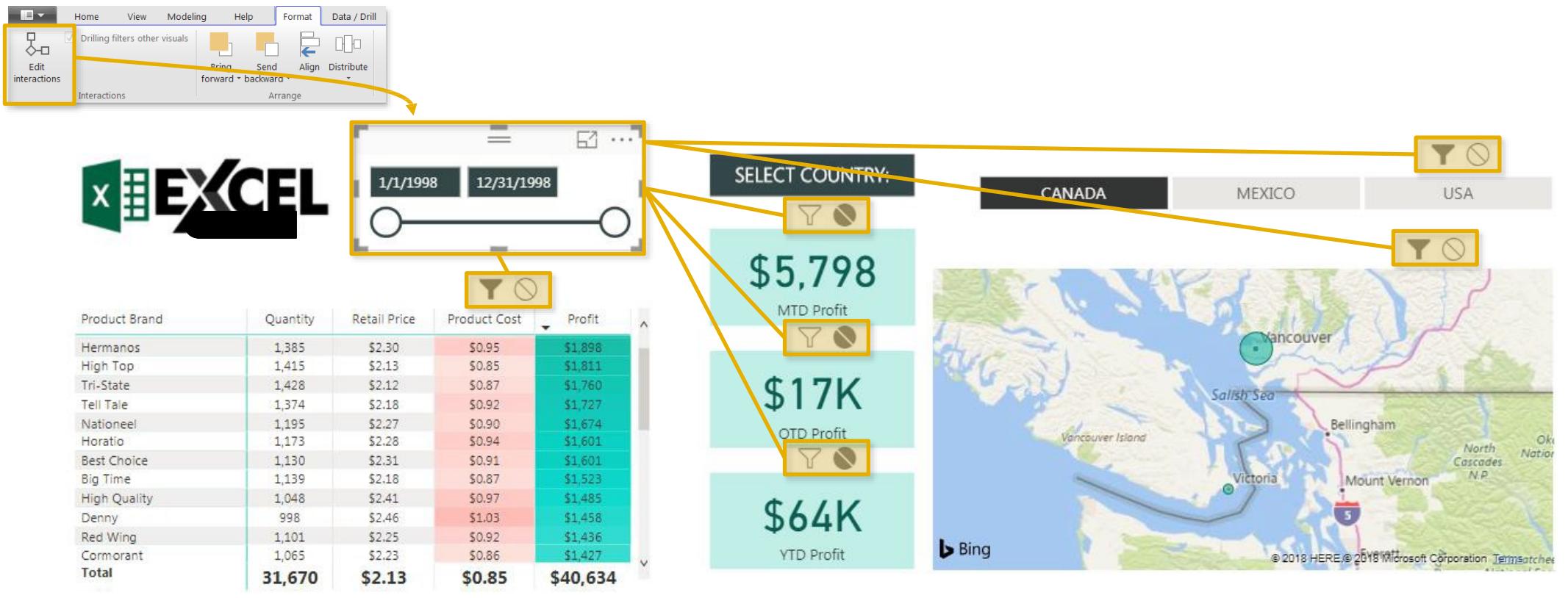


Advanced (Values)



Advanced (Text)

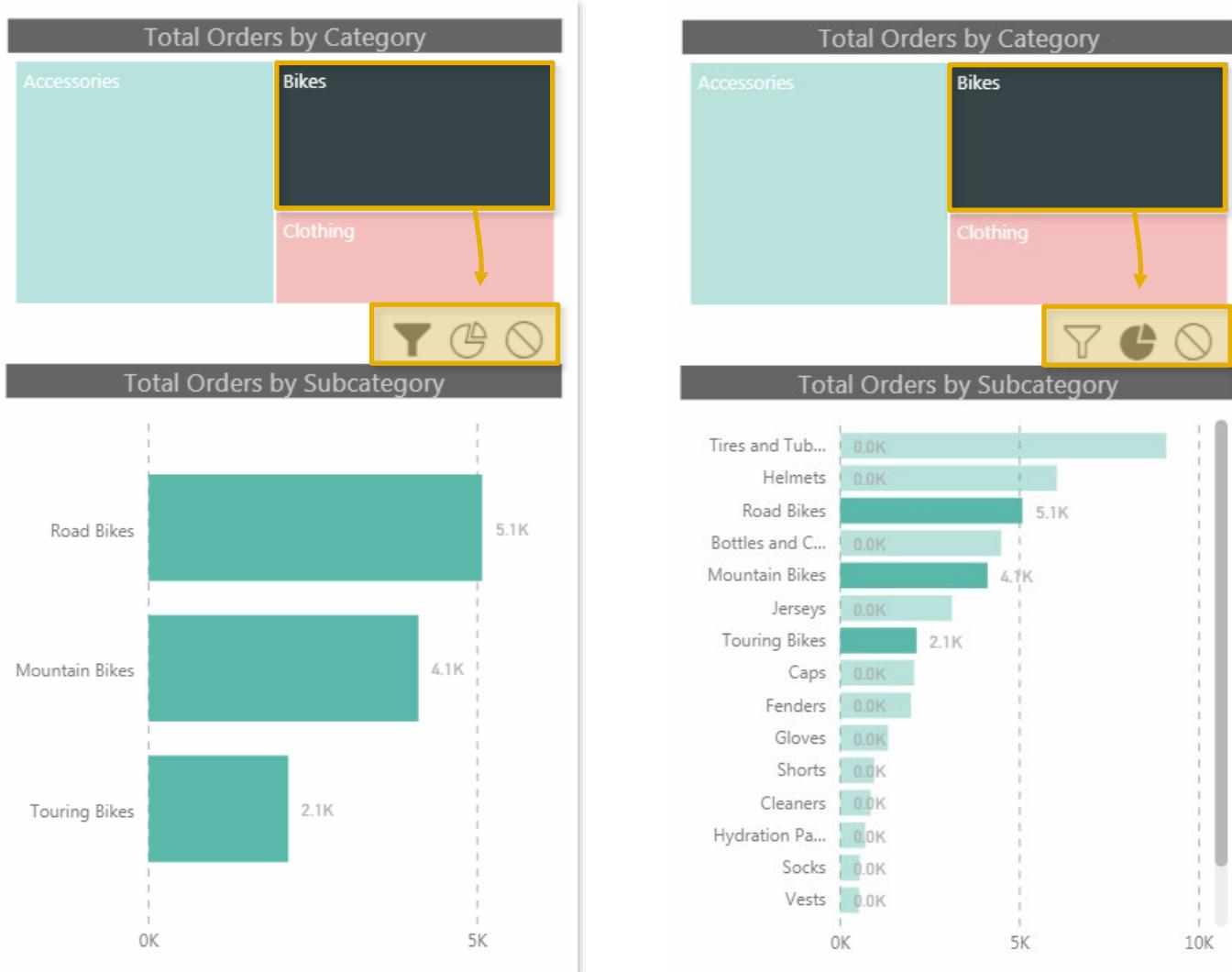
EDITING REPORT INTERACTIONS



Report interactions allow you to determine how filters applied to *one* visual impact the *others*

- For example, by selecting the Timeline visual and enabling “**Edit interactions**” from the **Format** tab, we can manually determine which visuals should “react” when the date range changes
- In this case the **Product matrix**, **Country slicer** and **Map** will filter in response to timeline changes (), but the **MTD**, **OTD**, and **YTD Profit** cards *will not* ()

EDITING REPORT INTERACTIONS (CONT.)



For certain types of visuals, a third option allows you to “highlight” sub-segments of the data, rather than simply filtering vs. not filtering

- When the interaction mode is set to “filter”, selecting the “**Bikes**” category in the treemap produces a filtered list of subcategories in the chart below
- When the interaction mode is set to “highlight”, selecting the “**Bikes**” category in the treemap highlights the relevant subsegment of data in the chart below



THANK YOU

