PowerBIUG

POWER BI USER GROUP

GETTING STARTED WITH POWER BI

A GUIDE FOR BUSINESS USERS

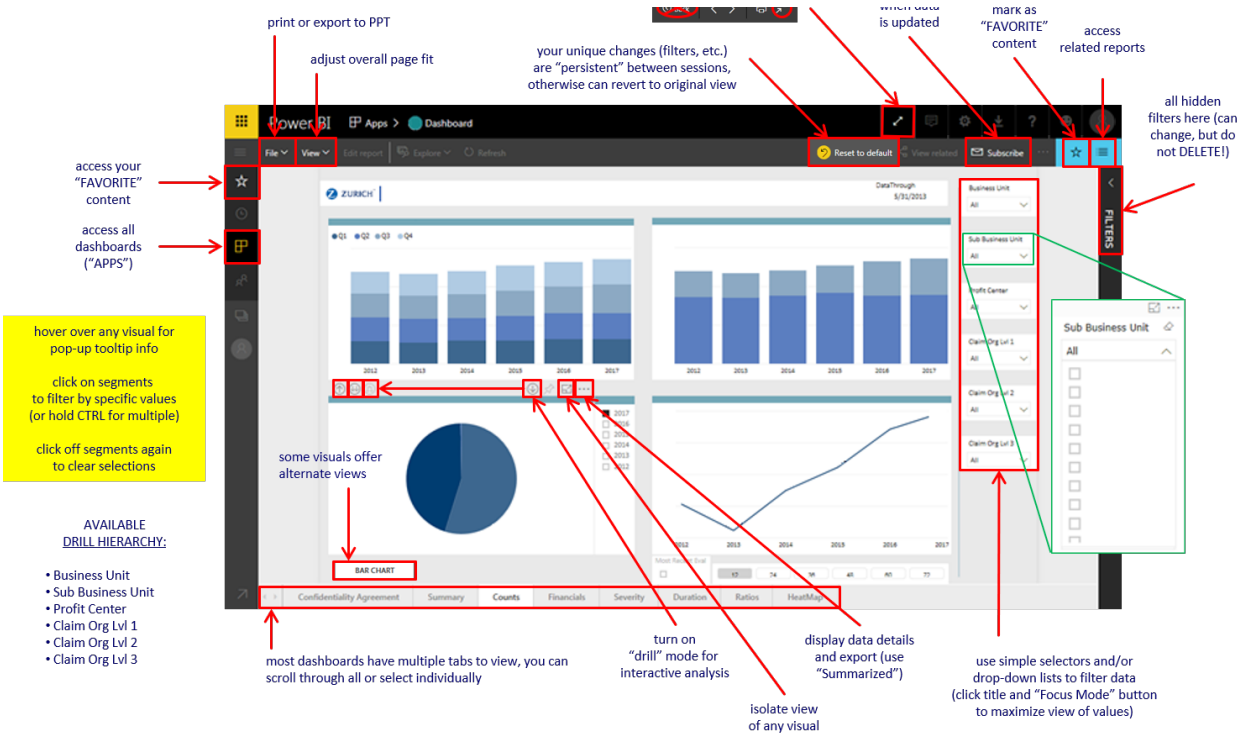
Business Users are a different breed, be it Finance, Marketing, Sales, Support or some other function. Tools have a different meaning to this group. Tools enable business users to do their job. The new world of Power BI changes how business users do their jobs...in a better way! But first? Business users need to know the basics...

GETTING STARTED WITH POWER BI

Power BI Navigation Overview

This section highlights an overview of navigation commands within a Power BI dashboard, created by James Cull. Knowing where to find features and functionality as well as getting used to the Power BI view you have at your organization is half the battle.

James' main objective is to help simplify/explain dashboard navigation for quick user adoption with efforts to make the interface familiar fast and get users past any initial tool barriers, so they can quickly look right past it and focus on dashboard content and leverage interactivity to derive intended business value.



GETTING STARTED WITH POWER BI

Top Five Navigation Questions and Answers

1. Why can't I see the full text of values in the drop-down selectors?

Due to tool and space limitations, the development team had to determine optimal dashboard layout, so tried to maximize important visualizations but minimize the selector panel. However, you can always hover over any value to see the full text, and if you click on the selector header, you will then get the "Focus mode" button to expand the selector.

2. Why do selectors still stay open after even I have selected a value?

Most selectors allow you to select MULTIPLE values, so lists will display until you manually click the drop-down arrow again to collapse them again.

3. How can I select everything over/under certain values, ie. multiple segments?

In most visualizations, you can use CTRL-click to select multiple segments.

4. How can I get back to the original dashboard starting point after I have done some filtering, drilling, or other live analysis?

You can always just refresh the dashboard page in your browser (F5) to get back to the original starting point or use the "Reset to default" button above each dashboard.

5. Once I delete a filter (under FILTERS pane on right), how can they be re-added?

Due to current tool limitations, unfortunately you can NOT re-add filters once deleted – so please do not click the "X" next to them! However, if done accidentally, please refer to the FAQ above.

GETTING STARTED WITH POWER BI

Helpful Dashboard Tips

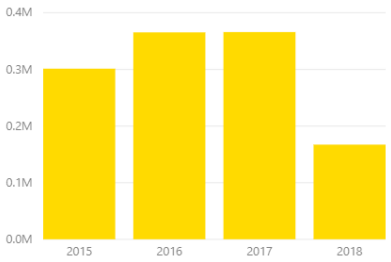
This section highlights a built-in user guide created by Mike Kromminga. He helps users understand drill downs, cross-highlighting, and exporting data by including a short description of tips within the dashboard along with animated GIFs to show users the proper steps.

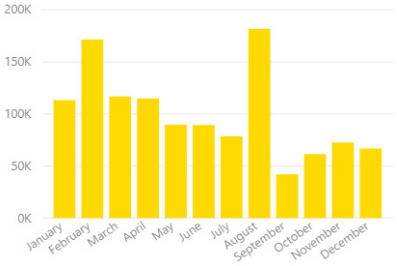
How to Drill

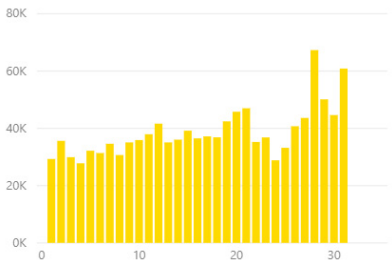
With properly modeled data, Power BI's drill features can be incredibly powerful to the end user by allowing them to see different aggregates of data on a single visual. This innate feature is enabled any time the report designer adds multiple fields into the chart axis. Because each organization will have different data hierarchies, the easiest way to illustrate is by looking at a date hierarchy. Power BI's three drill methods are outlined below.

Go To the Next Level in the Hierarchy

With this drill method each year is broken apart and each month and day is stacked. So each level shows all January data in one bar or each 5th of the month stacked. Note that when stacking each level of the hierarchy, the visual does not different between higher levels. When drilled to month data, different years or quarters are not broken out in each bar. This method works best when higher level data context is not relevant or important. See the examples below starting with yearly data, drilled to month, then to days.



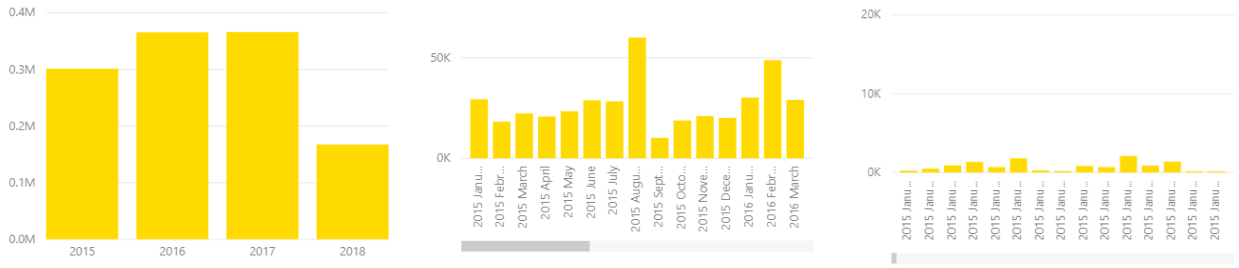




GETTING STARTED WITH POWER BI

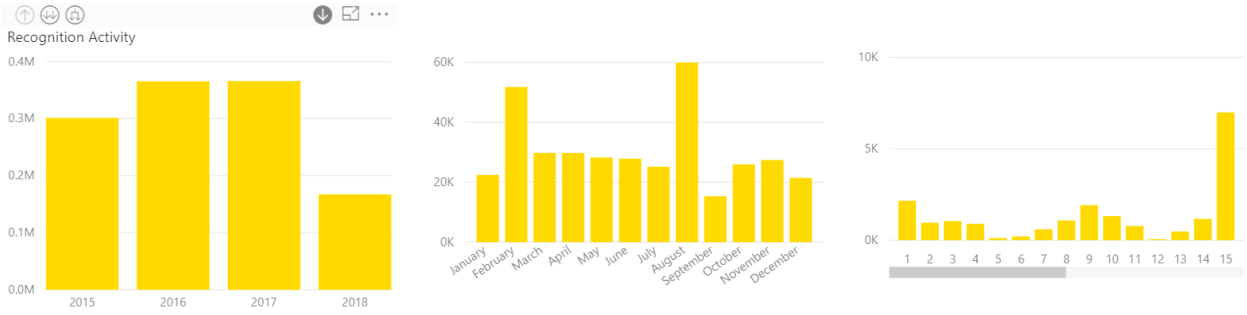
Expand All Down One Level in the Hierarchy

This drill method breaks each top level into individual components and expands the chart horizontally. This method is useful if top level context is important when comparing each of the lower levels. The example below shows starting with the same yearly view and how it's transformed with a horizontal scroll and additional values displayed.

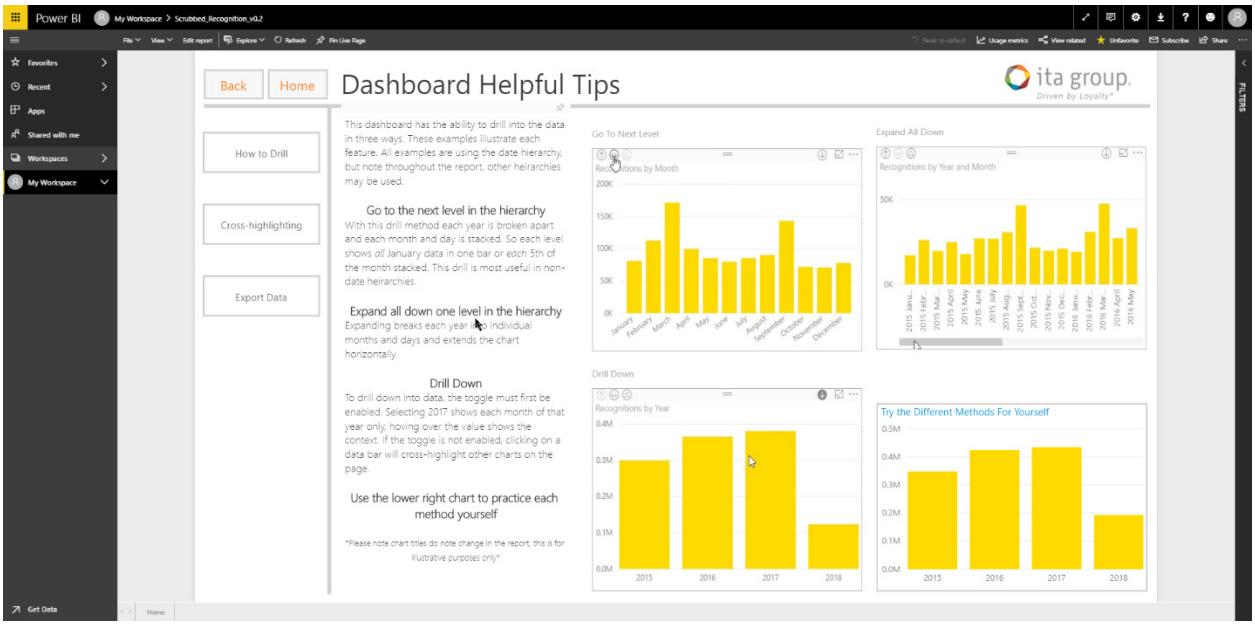


Drill Down

For many, the drill down method is the most popular and the useful to look at lower levels of data. To use this method, the drill down toggle must be enabled. The user will have to turn on the toggle each time they view the dashboard, it does not retain its setting between views. Once enabled, clicking on any data item (bar, column, line, etc.) will expand that single item into the next level. For example, selecting a single year will break it into each month with data present, and a single month will expand into each day with data present. This method is useful to understand how larger components split into smaller and smaller units. In the example below, notice the visual does not indicate which higher levels were drilled into, the report viewer will need to mentally record the steps of their drill as other visuals will likely be updated by cross filtering and the default view will no longer be shown.

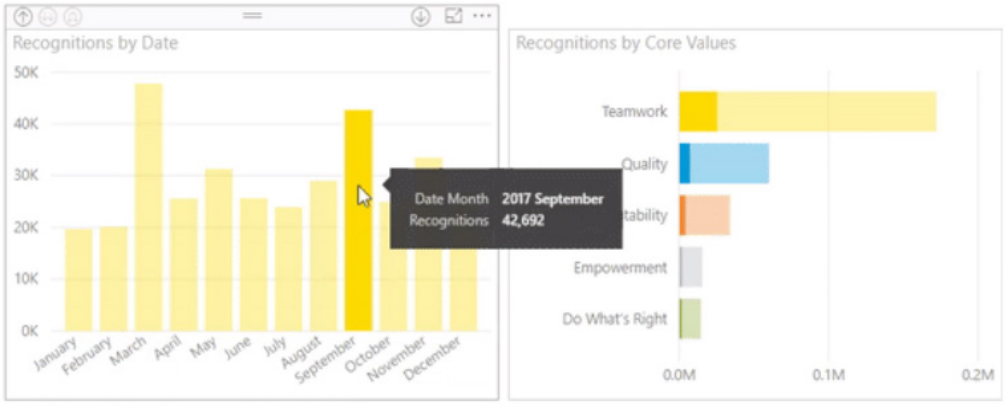


GETTING STARTED WITH POWER BI



Cross-highlighting

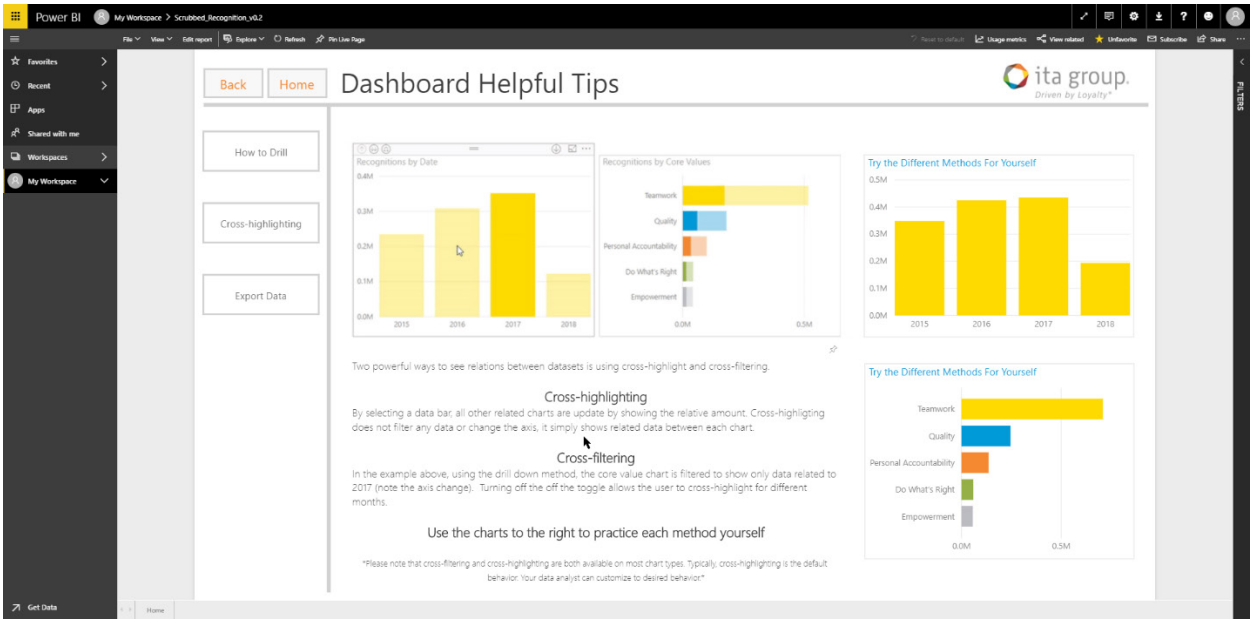
Cross-highlighting is a useful way to see how different pieces of data are related. With the drill down toggle turned off, selecting any data item (bar, column, line, etc.) will put that item in focus and make all others semi-transparent. With a data item selected, all other visuals on the page showing related data will also show focused data for the selected item on the first visual and semi-transparent for all unselected data.



GETTING STARTED WITH POWER BI

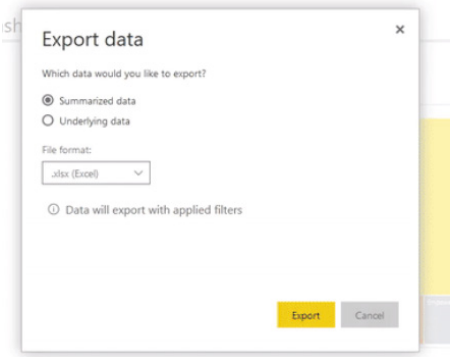
Cross-filtering

Cross-filtering is similar to cross-highligting, but instead of showing the proporational relation of datasets between visuals, the report will filter associated visuals to the selected data item. As cross-filtering is used, it may not be immediately clear to the user as it is subtler than cross-highlighting. But you will notice axis ranges changing as lower levels of data are drilled to or selected.



Exporting Data

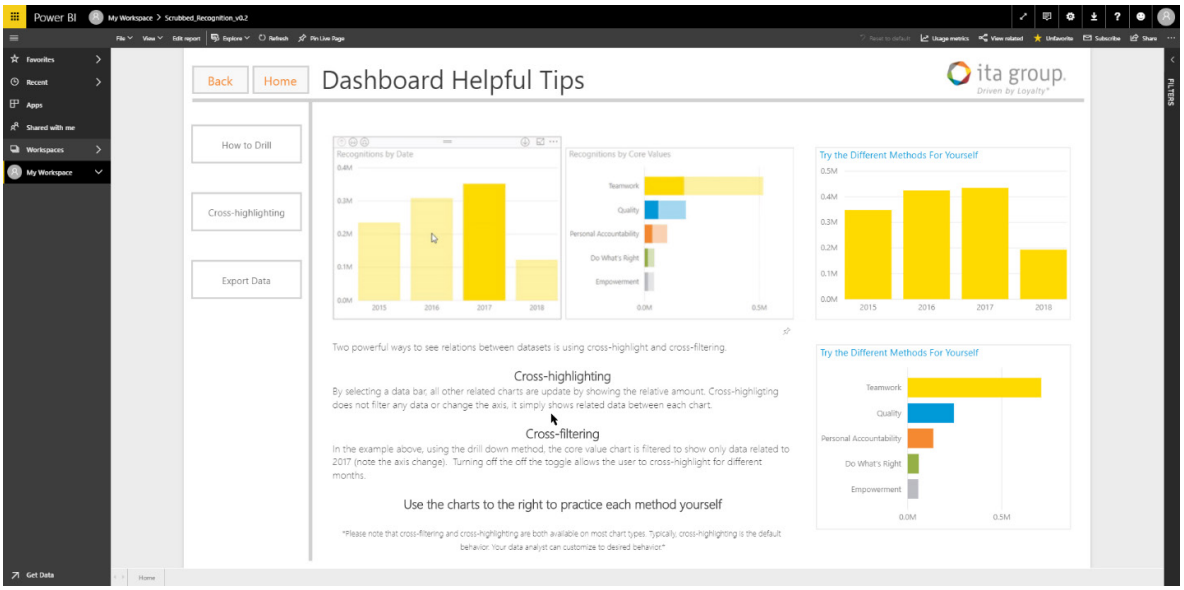
By selecting the elipse on a visual and then Export Data, users can download the data behind the chart. Exports can be into Microsoft Excel or .CSV formats. It is suggested that summarized data be used rather than underlying for size and usability.



If charts are updated through cross-filtering, that context will be applied to the export. Cross-highlighting will not alter the export. If

GETTING STARTED WITH POWER BI

additional columns are wanted in the export, your report author can customize the charts and optimize for exporting. All fields added to tooltips will also appear in the export. If exporting the data is determined to be an important function of your dashboard, care and planning should be done to make sure the proper fields are added to the report as drills or in the tooltips to make sure the export contains all wanted data.



How to add animated .gifs to user guides like Mike

A useful way to share customized instructions with report viewers is through animated gifs to illustrate the steps. This method reduces the amount of written instructions needed while offering more interactive instructions.

Record a video of your demonstrated steps using a tool like Snagit. Plan out the steps you're interested in showing and make sure mouse movements are purposeful and smooth. Once a video is recorded, convert it to a .gif file with a site like https://ezgif.com/video-to-gif. Add a basic chart visual to the canvas (line, bar, etc.). Through the Enter Data function, add a single row/column/value and name Placeholder or something more descriptive. Add this new value to the axis of your new visual, the visual will show a title, but nothing more at this point (make sure to add to the axis and not as a value). Next, under the visualization's Format pane, upload the gif file to the Plot Area and set the transparency to 0%, adjust the image fit as needed. Resize the chart to fill the desired space; if final proportions are not as desired, you may need to re-record the video and repeat all steps with an altered sized original visual.

GETTING STARTED WITH POWER BI

Learning the fundamentals of Power BI can help you do your job better and more efficiently. This is the exact goal of Power BI User Group and more so, the New Business Users Special Interest Group (SIG) is bringing all Business/ Excel users together to learn and leverage Power BI.

BE SURE TO BOOKMARK PBIUSERGROUP.COM/BUSINESSUSERS FOR QUICK & EASY ACCESS TO THE USER GROUP!

About the Contributors...

James Cull, BI Education Manager at Zurich Insurance

James has 20+ years' experience as business intelligence and analytics professional with business and technical knowledge, training and consulting skills, project and change management skills, team leadership experience, and international work experience. Primary career focus on aligning business initiatives and BI technology for max ROI.

Mike Kromminga, Senior Data Analyst at ITA Group

Mike has over 10 years of professional experience with the last 5 focused on reporting, analytics, and building visualizations that enable data driven decisions. His background in the financial services and banking sector along with ITA Group's broad client base have given him unique insights into the data needs of diverse companies spanning the globe. His passion is building datasets and tools to help others uncover their own data stories and drive change. In his free time, he enjoys expanding his whiskey collection and renovating houses – but not at the same time of course.