

Customizing Visuals in Power BI

FINANCIALEDGE¹

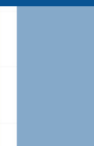
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DAY



Using a Date Hierarchy

YEAR



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Data Fields

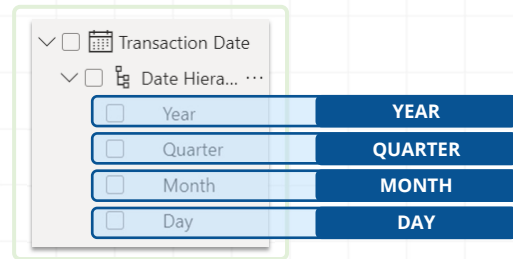
Hierarchical

4 layers available



A	
Transaction Date	
	01/01/2020
	02/01/2020
	03/01/2020
	04/01/2020
	05/01/2020
	06/01/2020

Layers of data are broken down



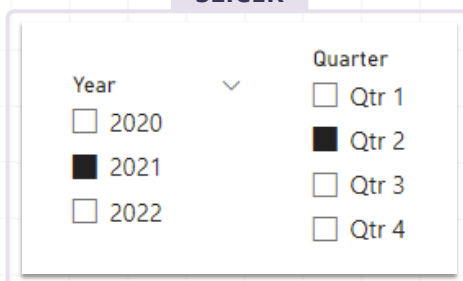
Automatically layer data in 4 parts

Using Date Hierarchy in Visuals

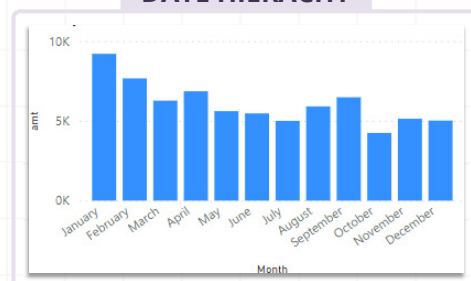
Lists each year or quarter

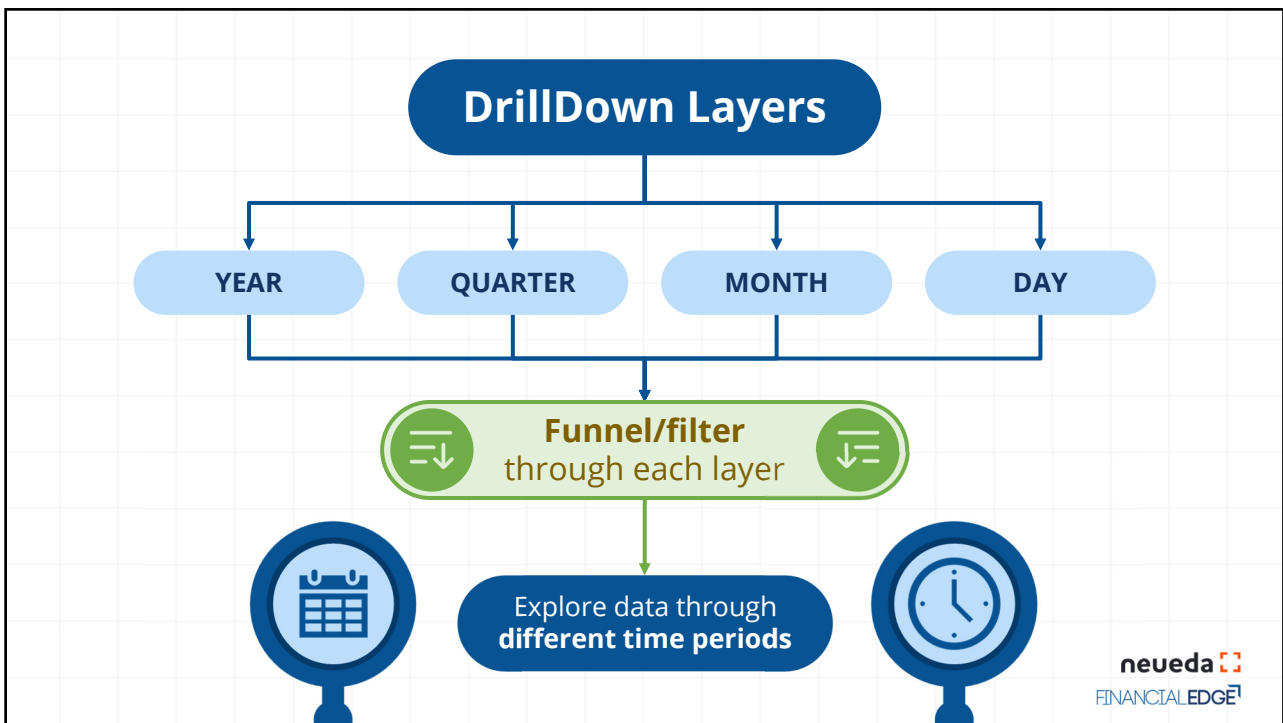
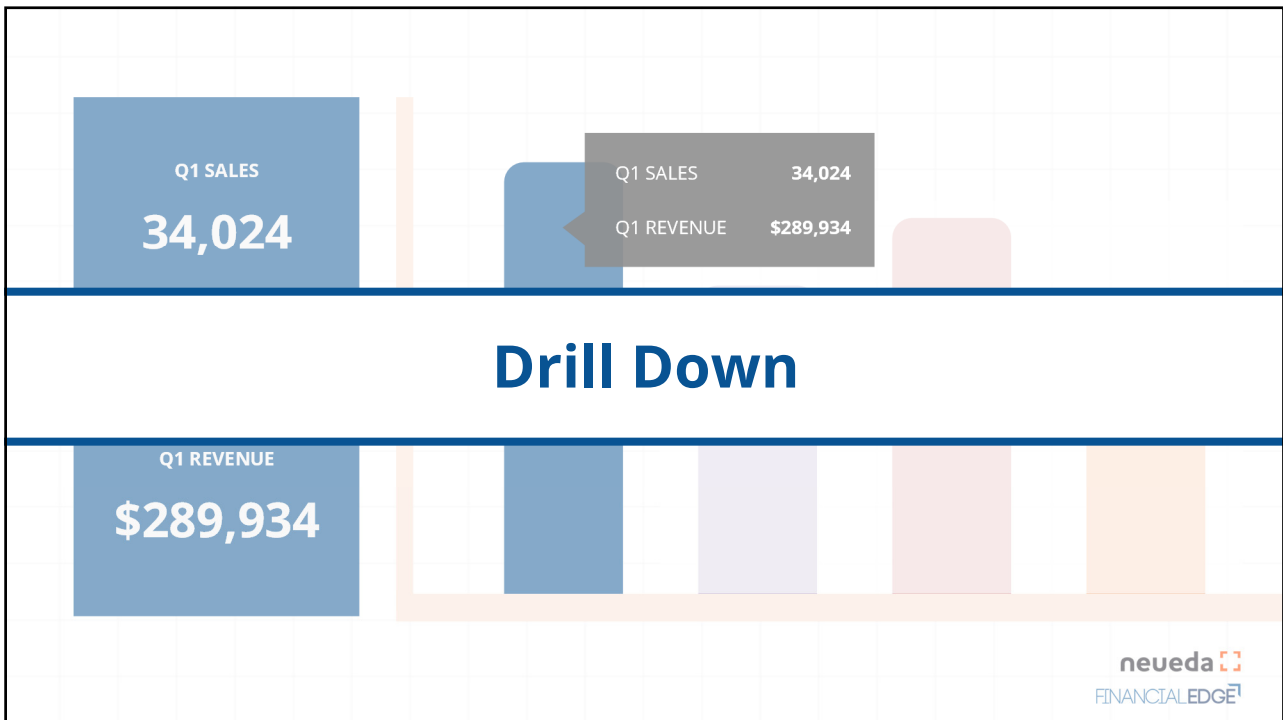
Group data – total each month

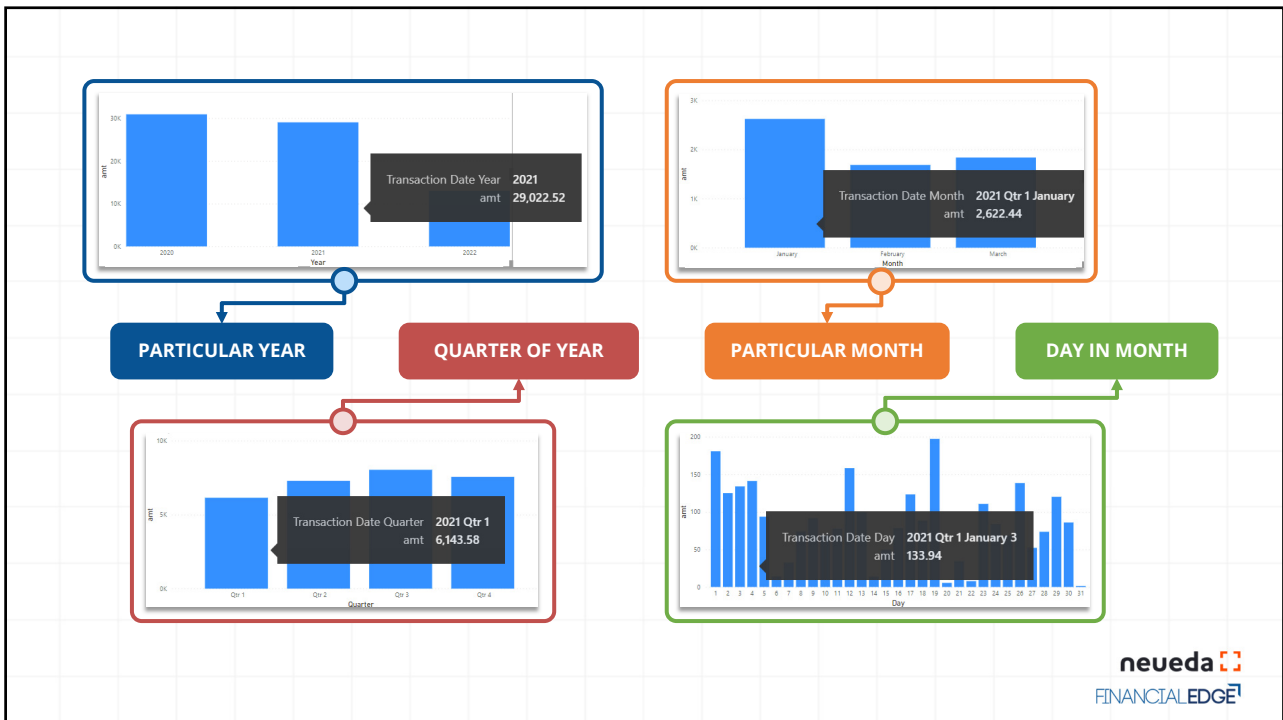
SLICER



DATE HIERACHY

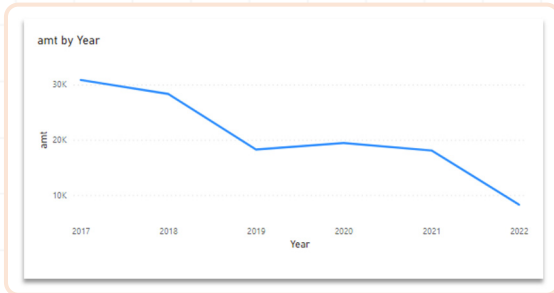




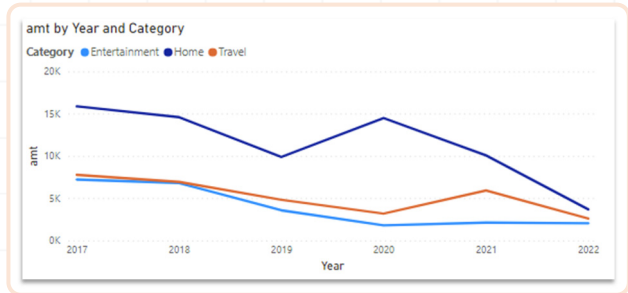


Line Charts

Great for showing trends over a period of time



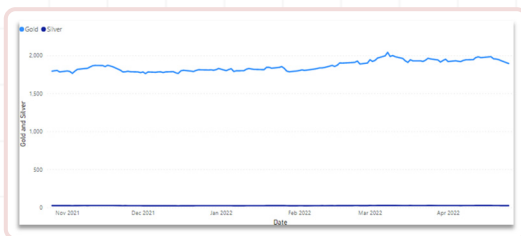
Single value



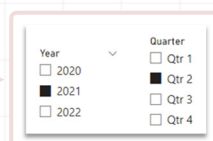
Several values

Secondary Axis

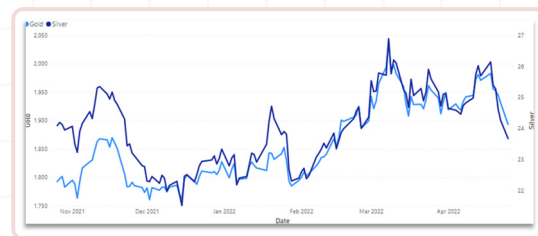
Smaller values can be plotted against it's own axis

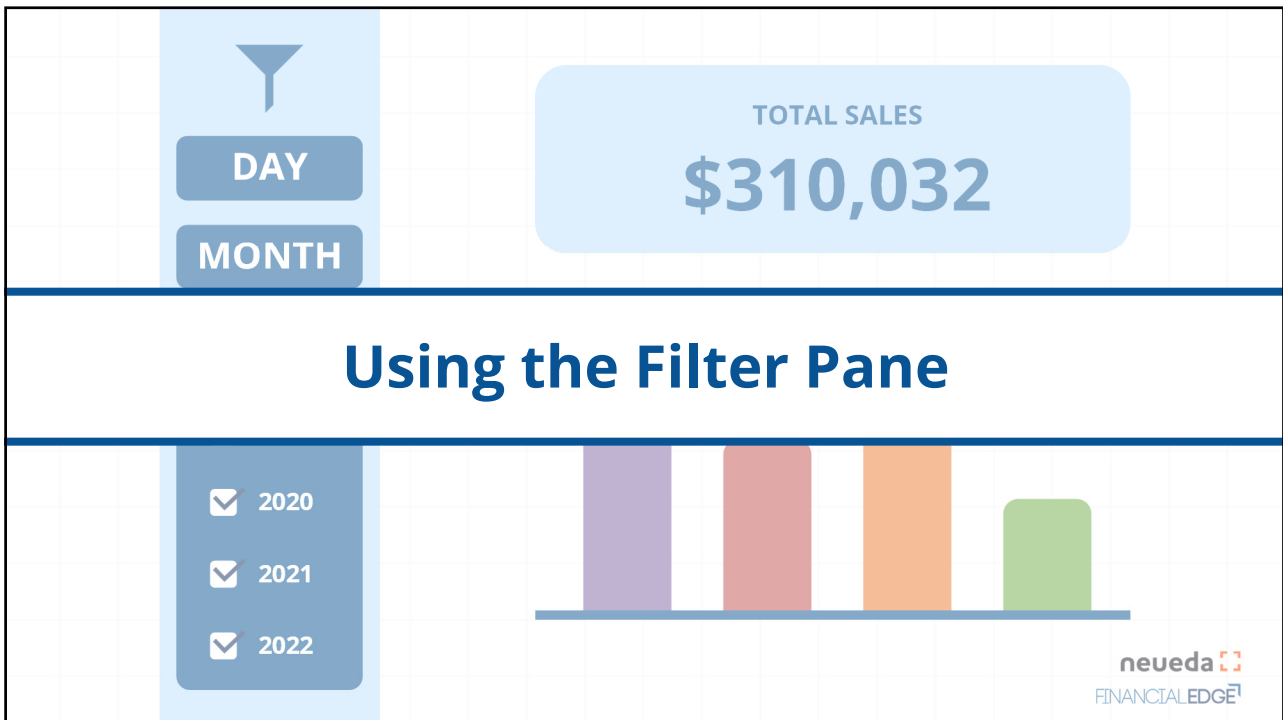


Difficult to see fluctuation



Compare fluctuation more easily





Filtering in Power BI

- Reduced rows being used
- Slicer – most common
- Easier to explore data

State

- Arkansas
- Colorado
- Florida
- Georgia
- Idaho
- Kentucky
- Louisiana
- Maryland
- Michigan

Year

- 2017
- 2018
- 2019
- 2020
- 2021
- 2022

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Filtering Pane

- 🔒
Permanent – don't often adapt
- Visual Level
Only applies to **selected visual**
- Page Level
Applies to **all visuals on page**
- Report Level
Applies to **all visuals on all pages**

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DAY

MONTH

TOTAL SALES

\$310,032

Using the Filter Pane

2020

2021


2022


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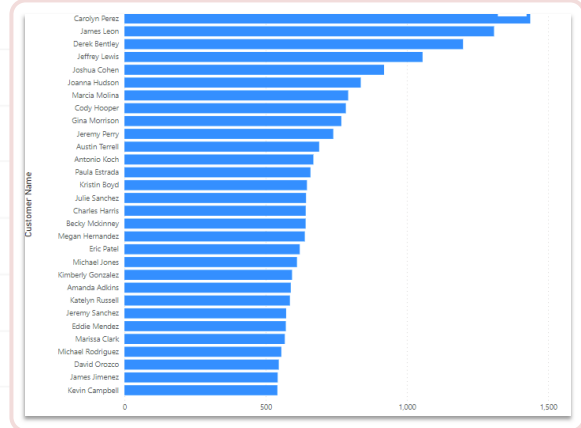
Top N Filter

 Specify quantity of values

 Top 10 or Most Popular


 Easier to analyse data

Total amount spent by each client



Too many values to display

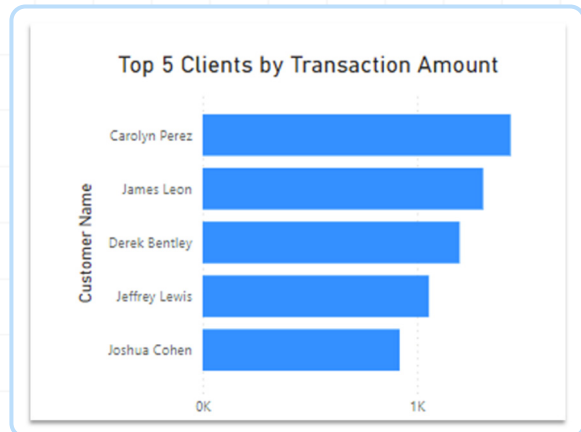
Top N Filter

 Updates when data is refreshed

 Applies to many visuals

- Tables
- Bar Charts
- Column Charts

Total amount spent by each client



Edit Interactions

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Interactive Report Pages

Explore data themselves

Slicers are common

Only display certain data

Month

- January
- February
- March
- April
- May
- June
- July
- August
- September
- October
- November
- December

Year

- 2017
- 2018
- 2019
- 2020
- 2021
- 2022

Month

- January
- February
- March
- April
- May
- June
- July
- August
- September
- October
- November
- December

Year

- 2017
- 2018
- 2019
- 2020
- 2021
- 2022

Select filter from slicer

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Interactions

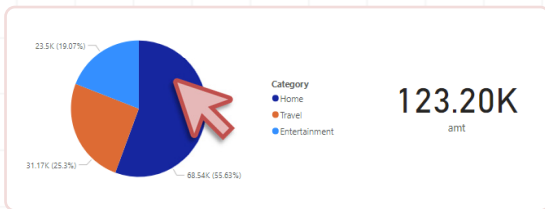
Visuals act as a filter

Occurs automatically

All chart types

Customize how they interact

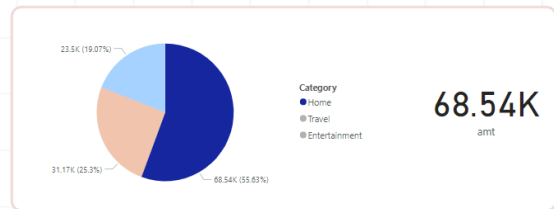
AMT CATEGORY DATA All Categories



123.20K
amt

Click on a segment

AMT CATEGORY DATA Home Category



68.54K
amt

Data filtered

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