



Advanced PBI Reports

Sample manual - first two chapters



Wise Owl
Training

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
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CHAPTER 1 - ADVANCED TABLES

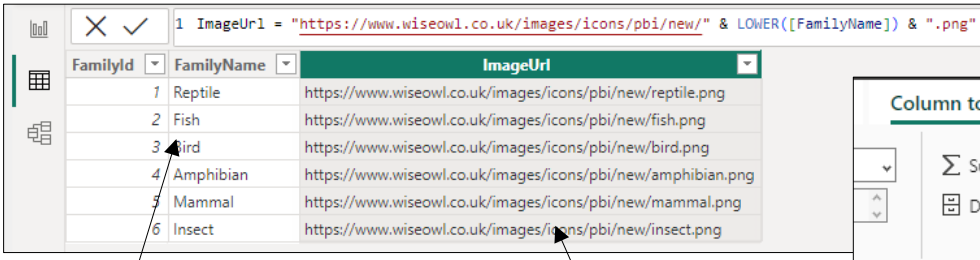
1.1 Showing Images in Tables

It's easy to show images in tables like this one, provided you remember to choose the right data type:

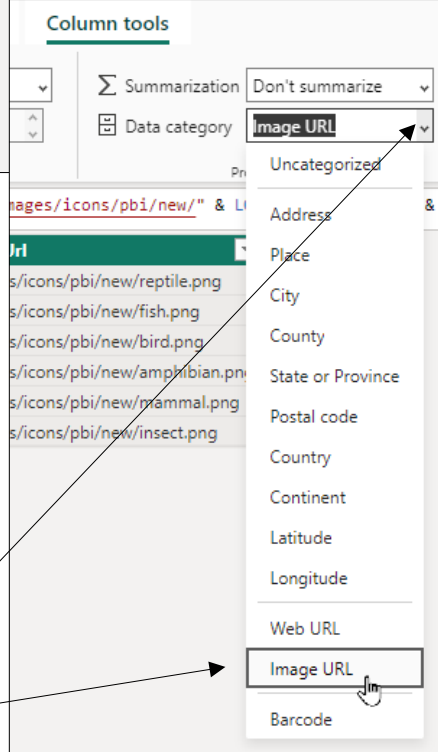
Family	Total qty	ImageUrl
Amphibian	1,603	
Bird	7,538	
Fish	1,258	
Insect	272	

Each picture is displayed using a link to the Wise Owl website – for example: <https://www.wiseowl.co.uk/images/icons/pbi/new/amphibian.png> .

To get this to work, follow the steps below:



1 ImageUrl = "https://www.wiseowl.co.uk/images/icons/pbi/new/" & LOWER([FamilyName]) & ".png"



a) Get data which contains the website address of an image for each row.

b) Select the column containing the image (we've included here the calculated column expression to derive the image URL from the name of the family as an advanced tip).

c) On the **Column tools** tab which appears in the ribbon, click on this drop arrow.

d) Choose to display this column in the table as an image (assuming that it contains the URL to an image).

Note that it's often a good idea to reduce the height of each image:

In the table's properties, it's often a good idea to reduce the height or width allowed for each image (use trial and error to determine the best values).

Image size

Height: 40 px

Width: 40 px

1.2 URLs in Tables

Designating Columns as URLs

These work in a similar way to images. The first thing you need is to create a table containing one or more different types of links:

UrlId	Url	Notes
1	https://www.wiseowl.co.uk/	The Wise Owl website
2	https://www.lorryspotting.com/	For lorry spotters everywhere
3	mailto:sales@wiseowl.co.uk	Email Wise Owl
4	ftp://completely-invented.com	A made up FTP address

This table contains two website addresses, an email link and an FTP site address.





You can then designate one of the columns as a URL:

a) Select the column which gives the URL to link to.

b) Choose this option on the **Column tools** tab which appears in the Power BI Desktop ribbon to designate this as a clickable hyperlink.

UrlId	Url	Notes
1	https://www.wiseowl.co.uk/	The Wise Owl website
2	https://www.lorryspotting.com/	For lorry spotters everywhere
3	mailto:sales@wiseowl.co.uk	Email Wise Owl
4	ftp://completely-invented.com	A made up FTP address

c) If you create a table based on this data, you can then click on any of the links (for example, this one would open your mail client, such as Outlook).

UrlId	Url	Notes
1	 The Wise Owl website	
2	 For lorry spotters everywhere	
3	 Email Wise Owl	
4	 A made up FTP address	

d) You can choose to display each URL as an icon (Power BI will do its best to show an appropriate one) by setting this property for your table:

Displaying Other Fields as Links

Rather than displaying a URL as clickable, it's often better to make some other column in your table give a link to a website or email address:

UrlId	Url	Notes	Link
1	https://www.wiseowl.co.uk/	The Wise Owl website	Wise Owl
2	https://www.lorryspotting.com/	For lorry spotters everywhere	Lorries!
3	mailto:sales@wiseowl.co.uk	Email Wise Owl	Email us
4	ftp://completely-invented.com	A made up FTP address	FTP site

Here we've added a field to our table of URLs giving a description of each link ...

Link	Notes
Email us	Email Wise Owl
FTP site	A made up FTP address
Lorries!	For lorry spotters everywhere
Wise Owl	The Wise Owl website

... and formatted this to appear as a clickable hyperlink.

To do this you set the **Web URL** property of a field to be a hyperlink column:

Link	Notes
Email us	Email Wise Owl
FTP site	A made up FTP address
Lorries!	For lorry spotters everywhere
Wise Owl	The Wise Owl website

- a) Create a table to include the column you want to make clickable.
- b) In the **Cell elements** card, select the column that you want to be clickable.
- c) Click to show a web URL for each table row for this column.

> Specific column

▼ Cell elements

Apply settings to

Series

Link

Background color Off

Font color Off

Icons Off

Web URL On

Web URL - Web URL

Format style: Field value

Apply to: Values only

What field should we base this on?

First Url

Search

- > Family
- > Habitat
- > Product
- > Region
- > Sales
- > Town
- ▼ UrIs
 - Link
 - Notes
 - Url
 - Σ UrlId

Summarization: First

d) Assign a field which contains a valid URL to this field.



Don't worry too much about the **Summarization** option **First** in the dialog box above. This is saying that for each web link Power BI Desktop will apply the first URL that it finds in the table for this link – but this will also necessarily be the only one!

1.3 Sorting by Multiple Columns

You can sort by more than one column as shown below:

For this example we've sorted the data:

- In reverse alphabetical order by region name; then
- Within this, in reverse alphabetical order by environment name.

Region	Environment	Average qty
Yorkshire & Humberside	Water	2.33
Yorkshire & Humberside	Land	2.29
Yorkshire & Humberside	Air	2.39
West Midlands	Water	2.36
West Midlands	Land	2.32
West Midlands	Air	2.15
South West	Water	2.06
South West	Land	2.28
South West	Air	2.38

To do this, first click once on the main column you want to sort by (click a second time to reverse the sort order):

A downward arrow shows that you're sorting in reverse order by this column.

Region	Environment
Yorkshire & Humberside	Air
Yorkshire & Humberside	Land
Yorkshire & Humberside	Water
West Midlands	Air

Now hold down the **Shift** key and click on each subsequent column that you want to sort by:

Click a second time (with the **Shift** key still held down) to reverse the sort order for any subsequent column.

Region	Environment	Average qty
Yorkshire & Humberside	Water	2.33
Yorkshire & Humberside	Land	2.29
Yorkshire & Humberside	Air	2.39
West Midlands	Water	2.36
West Midlands	Land	2.32
West Midlands	Air	2.15



To return to normal sorting just click at the top of any column without holding down the **Shift** key.

1.4 Preventing Data Aggregation

By default Power BI often treats numerical fields as numbers (and aggregates them) but you can get round this either for a single table or by changing the default field setting.

Shopping centre		Year	
Altrincham Retail Park		2023	

Sales for this centre			
Product	Sum of Quantity	Sum of Price	
Englebert	1	£3.95	
Imogen	12	£11.97	
Yoko	1	£12.99	

Here Power BI automatically sums the two numerical fields for each product, but what if we want to list each sale row separately to get this?

Sales for this centre			
Product	Quantity	Price	
Englebert	1	£3.95	
Imogen	2	£3.99	
Imogen	3	£3.99	
Imogen	7	£3.99	
Yoko	1	£12.99	

Preventing Summarising for Single Fields

You can turn off summarising for single fields like this:

Columns	Data
Product	Field
Sum of Quantity	Sum of Quantity
Sum of Price	Aggregation
+Add data	

a) Click on the arrow to the right of each field in the field well.

b) From the dropdown list of options which appears, choose **Don't summarize** for the **Quantity** and **Price** fields to get this:

Columns
Product
Quantity
Price

b) Power BI now groups the data by each product's price and quantity, rather than adding these numbers together.

Product	Quantity	Price	
Englebert	1	£3.95	
Imogen	2	£3.99	
Imogen	3	£3.99	

Changing the Default Summarisation Options

Here are two ways to force Power BI to group data by a field by default:

Table tools						Column tools	
Quantity		Format: Whole number		Summarization: Sum		Data category: [None]	

SaleDate	ProductId	Centred	Quantity	Price
Friday 04 January 2019	1	252	2	£8.
Monday 07 January 2019	1	341	2	£8.
Sunday 13 January 2019	1	360	2	£8.
Thursday 17 January 2019	1	309	2	£8.
Saturday 19 January 2019	1	270	2	£8.50

The obvious way is to click on a column (such as the **Quantity** one here) and change the default summarisation option to **Don't summarize**.

However, you could also change the data type of a numerical column to text. This will mean that it is left-aligned by default, and it will be impossible to aggregate it!

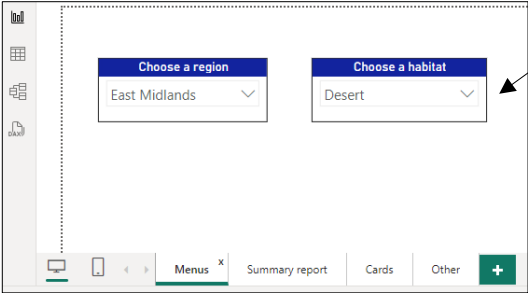
Name	SaleId	Data type
157	157	Whole number
160	160	Decimal number
171	171	Fixed decimal number
176	176	Date/time
178	178	Date
183	183	Time
189	189	Text
		True/false

CHAPTER 2 - ADVANCED SLICERS

2.1 Sync Slicers

What are Sync Slicers?

Sync slicers let you repeat slicers that you've created on every page (or selected pages) of a report:

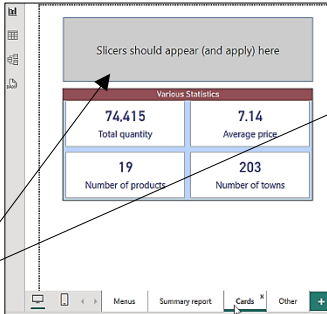


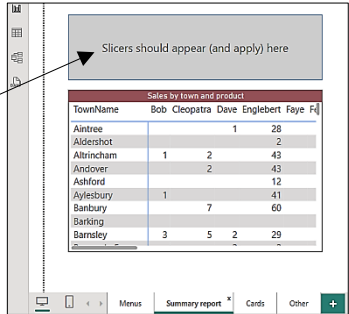
Choose a region: East Midlands

Choose a habitat: Desert

You can use sync slicers to repeat slicers you've created like these, filtering by region and habitat ...

... on certain pages of your report (here the **Summary report** and **Cards** pages).

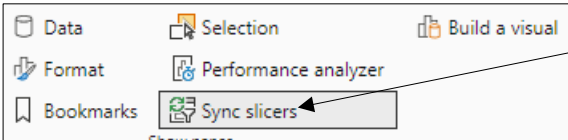




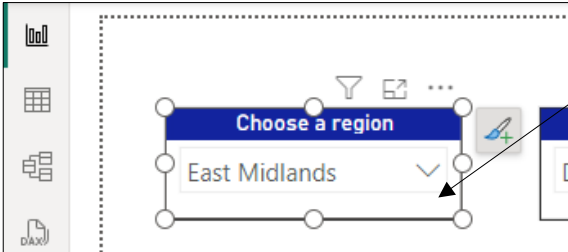
TownName	Bob	Cleopatra	Dave	Englebert	Faye
Aintree			1		28
Aldeistrot					2
Altrincham	1	2			43
Andover		2			12
Ashford					12
Aylesbury	1				41
Banbury			7		60
Barking					60
Barnsley	3	5	2		29

Viewing Sync Slicers

You can configure sync slicers as follows:



a) Select this icon on the Power BI **View** menu to show the **Sync slicers** pane.



b) Click on a slicer to show its current sync settings (see overleaf for what these mean):

Sync slicers ... >>

Add and sync with all pages, or select specific pages:

Page name	Refresh	Sync
Menus	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Summary report	<input type="checkbox"/>	<input type="checkbox"/>
Cards	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>

What the Symbols Mean

For our example, here's what you'd choose:

Sync slicers ... >>

Add and sync with all pages, or select specific pages:

Page name		
Menus	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Summary report	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cards	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>

The left-hand symbol shows whether filtering set in the slicer will apply on the selected page.

The right-hand symbols show whether the currently selected slicer will be visible on the relevant page.

These settings would mean that the selected region slicer appears on the **Summary report** page and applies to it.

TownName	Bob	Cleopatra	Dave	Englebert	Faye	Fer
Chesterfield						6
Corby		7	4			71
Derby		2	2			100
Grimsby	1		4	2		64
Kettering			4			8
Leicester	1		18			251
Lincoln		15	4			61
Loughborough			2			5
Mansfield		4				22



The sync slicer feature is one of the buggier parts of Power BI. A particular problem is when you apply a sync slicer to a page and then change your mind and un-apply it. Power BI will behave as if there is still a hidden slicer on this page: the best solution is to create a new page, copy the visuals from the old page to the new one and then delete the old, original page (this gets round the problem).

Grouping Slicers

For those who think sync slicers aren't already complicated enough to understand, you can use sync slicer **Advanced options** to create slicer *groups*:

Select each of the slicers you want to synchronise in turn ...

... and assign exactly the same group name to each. In theory the slicers should now be in step with each other, although like so many things to do with sync slicers this doesn't always seem to work in practice.

Advanced options

Enter a group name to sync selection to any other visuals with that group name

HabitatSlicers

- Sync field changes to other slicers
- Sync filter changes to other slicers

2.2 Applying/Clearing All Slicers

How Applying/Clearing Slicers Works

Refreshing all your visuals every time you change a slicer's filtering can take a while. You can add buttons to accumulate all the changes you've made, and apply (or clear) them in one go:

Initially this button to apply all slicer changes is disabled ...

... but the moment you make changes to any of the slicers on the page it is enabled.

TownName	Kylie	Rheinhardt
Birmingham	64	4
Burton On Trent	4	
Coventry	9	1
Dudley	25	
Kidderminster	10	
Newcastle Under Lyme	5	

Adding the Buttons

To add these buttons:

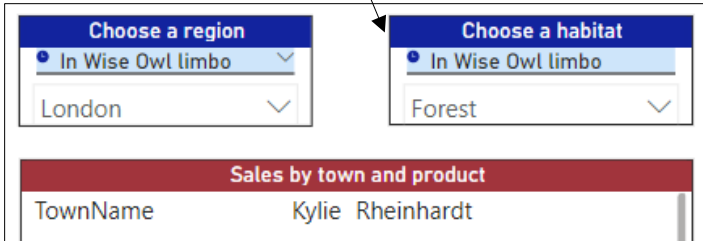
a) Choose to add one of the buttons from the Power BI Insert menu (here we're adding a button to apply any slicer changes the user has made).

b) Apply formatting changes to the **Default**, **On hover** and **Disabled** settings of each button to control how it appears (see the separate chapter on buttons for how to do this generically for all buttons using templates).

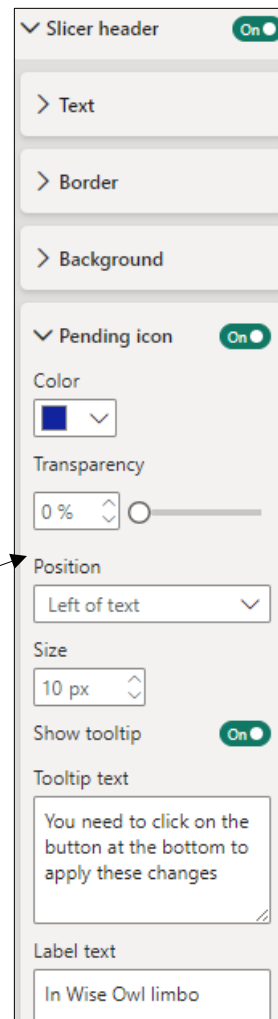
Showing a Pending Icon

If you've made a change to a slicer but not applied it, you can show a *pending* icon:

The slicer header shows a dark blue icon to show that a change is pending, and also some explanatory text.



You can control how (and whether) this pending icon appears in the **Slicer header** section of a slicer's formatting properties. Here we've moved the icon to appear to the left of the text and changed the text colour, wording and tooltip.



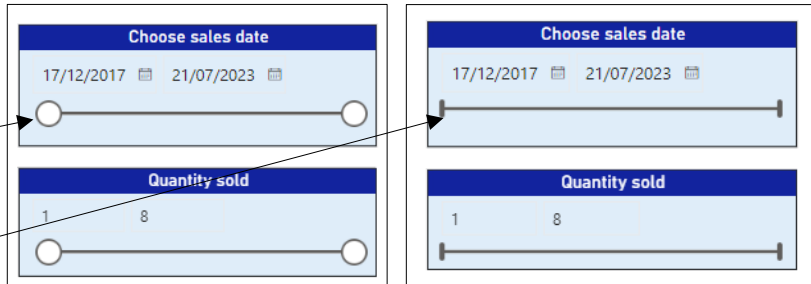
2.3 Tricks with Slicers

Changing Date and Numeric Slicers

Don't like circles? Change them!

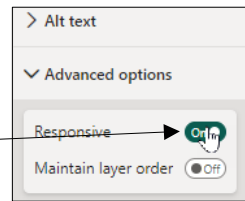
Normally the end points of date and numeric slicers show up as circles ...

... but you can easily change this to simple end lines.



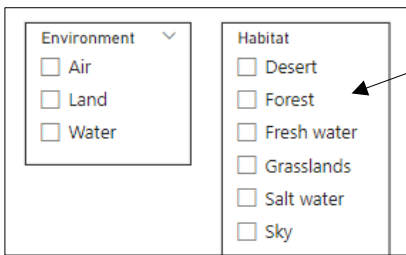
To make this change, tell Power BI to stop making your slicers *responsive*:

Untick this option in each slicer's general formatting properties pane. Because the slicer is no longer responding to different screen sizes, Power BI is forced to stop drawing circles (at least, that's how the author interprets this).

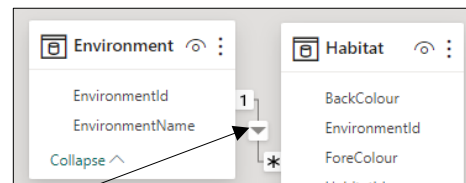


Slicer Interactions

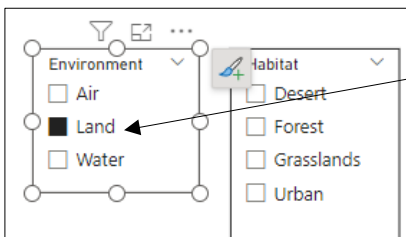
How one slicer affects another depends on the configuration of your table relationships:



The two slicers shown on the left are based on the related tables shown on the right.

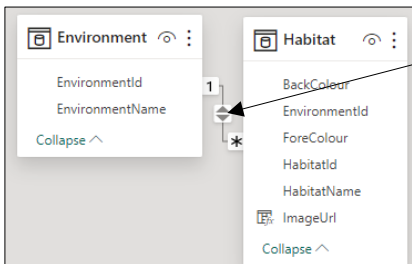
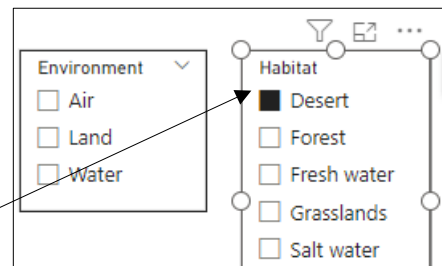


The cross filter direction of this relationship is single, as shown by the arrow.

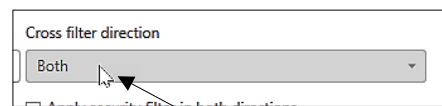


When the cross filter direction of the relationship is single, clicking an item in the environment slicer filters the habitat slicer, but ...

... clicking an item in the habitat slicer doesn't affect the environment slicer.







You can double-click the relationship and set the cross filter direction to **Both**.



This means that clicking an item in either slicer will affect the other.

WHAT WE DO

					
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OFFICE 365	Microsoft Excel	✓	✓	✓	✓
	VBA macros	✓	✓	✓	✓
	Office Scripts	✓		✓	
	Microsoft Access				✓
POWER PLATFORM	Power BI and DAX	✓	✓	✓	✓
	Power Apps	✓		✓	
	Power Automate	✓	✓	✓	✓
SQL SERVER	Reporting Services	✓	✓	✓	✓
	Report Builder	✓		✓	✓
	Integration Services	✓	✓	✓	✓
	Analysis Services	✓		✓	
CODING LANGUAGES	SQL	✓	✓	✓	✓
	Visual C#	✓	✓	✓	✓
	Python	✓	✓	✓	✓



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