



Advanced PBI Reports

Sample manual - first two chapters



Wise Owl
Training

TABLE OF CONTENTS (1 of 5)

1	ADVANCED TABLES	Page
1.1	Showing Images in Tables	7
1.2	URLs in Tables	8
	<i>Designating Columns as URLs</i>	8
	<i>Displaying Other Fields as Links</i>	9
1.3	Sorting by Multiple Columns	10
1.4	Preventing Data Aggregation	11
	<i>Preventing Summarising for Single Fields</i>	11
	<i>Changing the Default Summarisation Options</i>	11

2	ADVANCED SLICERS	Page
2.1	Sync Slicers	12
	<i>What are Sync Slicers?</i>	12
	<i>Viewing Sync Slicers</i>	12
	<i>What the Symbols Mean</i>	13
	<i>Grouping Slicers</i>	13
2.2	Applying/Clearing All Slicers	14
	<i>How Applying/Clearing Slicers Works</i>	14
	<i>Adding the Buttons</i>	14
	<i>Showing a Pending Icon</i>	15
2.3	Tricks with Slicers	16
	<i>Changing Date and Numeric Slicers</i>	16
	<i>Slicer Interactions</i>	16

3	FIELD PARAMETERS	Page
3.1	Our Example	17
3.2	Creating Field Parameters	18
3.3	Using Field Parameters	19
	<i>Viewing and Editing the Parameter</i>	19
	<i>Improving your Slicer</i>	19
	<i>Referencing Field Parameters in Visuals</i>	20
	<i>Referencing the Field Parameter in a Visual Title</i>	20

4	NUMERIC RANGE PARAMETERS	Page
4.1	Our Example	21
	<i>The Steps to Follow</i>	21
4.2	Creating and Using Numeric Range Parameters	22
	<i>Step 1 – Create the Numeric Range Parameter</i>	22
	<i>Step 2 – Customise the Slicer</i>	22
	<i>Step 3 – Create a Quick Measure to Show your Data</i>	24
	<i>Step 4 – Display your Measure in a Visual</i>	25

5	CONDITIONAL FORMATTING	Page
5.1	Conditional Formatting	26
5.2	Applying Conditional Formatting	27
	<i>Setting Conditional Formatting</i>	27
	<i>Changing Conditional Formatting</i>	27
5.3	Gradient Effects	28
	<i>Adding a Middle Colour</i>	28
5.4	Rules-Based Conditional Formatting	29
5.5	Formatting Using Field Values	30
5.6	Data Bars	31
5.7	Displaying Icons	32

6	DYNAMIC FORMATTING	Page
6.1	Our Example	33
6.2	Creating our Example	34
	<i>Creating our Card</i>	34
	<i>Applying Title Dynamically Formatting</i>	35
	<i>Applying Other Dynamic Formatting</i>	36
	<i>Copying our Visual</i>	36

TABLE OF CONTENTS (2 of 5)

7	TOOLTIPS	Page
7.1	Overview	37
7.2	Legacy vs Modern Tooltips	38
7.3	Basic Tooltips	39
	<i>Applying Basic Tooltips</i>	39
	<i>Formatting Tooltips</i>	39
	<i>Standardising Tooltip Formatting</i>	40
	<i>Adding Fields to Tooltips</i>	41
7.4	Static Report Page Tooltips	42
	<i>Step 1 – Create the Tooltip Page</i>	42
	<i>Step 2 – Setting the Page Size</i>	43
	<i>Step 3 – Hiding your Report</i>	43
	<i>Step 4 – Creating the Tooltip Report</i>	43
	<i>Step 5 – Assigning a Report Page to a Tooltip</i>	44
7.5	Dynamic Report Page Tooltips	45
	<i>Step 1 – Creating the Tooltip Page</i>	45
	<i>Step 2 – Adding Content to the Tooltip Page</i>	45
	<i>Step 3 – Assigning Fields to the Tooltip Report Page</i>	46
	<i>Step 4 – Choosing By Category or Summarized</i>	46
	<i>Step 5 – Choosing whether to Keep Filters</i>	47
	<i>Step 6 – Assigning your Tooltip Report Page to a Visual</i>	47
	<i>Step 7 – Customising the Title</i>	48
7.6	Visual Header (Help) Tooltips	49
	<i>Step 1 – Creating the Tooltip Page</i>	49
	<i>Step 2 – Creating the Report Page for the Tooltip</i>	49
	<i>Step 3 – Assigning your Page to the Visual Header</i>	50

8	STATISTICAL CHARTS	Page
8.1	Types of Statistical Chart	51
8.2	Trend Lines	52
	<i>The Combine Series Option</i>	52
8.3	Showing Forecasts	53
8.4	Reference Lines	54
	<i>Adding a Reference Line</i>	54
	<i>Formatting a Reference Line</i>	55
	<i>Deleting Reference Lines</i>	55
8.5	Anomalies and Expected Ranges	56
	<i>Showing the Expected Range</i>	56
	<i>Showing Anomalies</i>	57
	<i>Explanatory Fields</i>	57

9	DECOMPOSITION TREE	Page
9.1	Overview	58
9.2	Creating and Using	59
	<i>Creating a Decomposition Tree</i>	59
	<i>Using a Decomposition Tree</i>	59
	<i>Removing Unwanted Levels</i>	60
	<i>Expand and Collapse Options</i>	60
	<i>Locking Levels</i>	60
9.3	Formatting Decomposition Trees	62
	<i>Title and Subtitle</i>	62
	<i>Tree Density</i>	62
	<i>Changing the Connectors</i>	62
	<i>Formatting the Data Bars</i>	63
9.4	AI Splits	64
	<i>Turning AI Splits Off</i>	64
	<i>Absolute Splits</i>	64
	<i>Relative Splits</i>	65

10	KEY INFLUENCERS	Page
10.1	Creating a Key Influencers Visual	66
	<i>Using Multiple Explanation Fields</i>	67
	<i>Changing the Analysis Type</i>	67
	<i>Binning Values</i>	68
	<i>Displaying a Count of Values</i>	69
	<i>The Expand By Option</i>	70
10.2	Top Segments	70
	<i>Viewing Top Segments</i>	71
	<i>Drilling into a Segment</i>	71

11	ADVANCED CHARTS	Page
11.1	Ribbon Charts	72
11.2	Funnel Charts	72
11.3	Waterfall Charts	73
	<i>Parts of a Waterfall Chart</i>	74
	<i>Creating a Basic Waterfall Chart</i>	75
	<i>Showing Breakdowns</i>	75

TABLE OF CONTENTS (3 of 5)

12	QUICK MEASURES	Page
12.1	What are Measures?	76
	<i>Ways to Create Measures</i>	76
12.2	Creating Normal Measures	76
	<i>Step 1 - Creating a Measures Table</i>	77
	<i>Step 2 – Adding a Measure</i>	77
12.3	Creating Quick Measures	78
	<i>Step 1 – Adding a Quick Measure</i>	78
	<i>Step 2 - Choosing the Calculation Type and Base Value</i>	78
	<i>Step 3 - Specify any Filtered Value</i>	79
	<i>Step 4 - Viewing and Tidying Up your Quick Measure</i>	79
12.4	Quick Measures using Copilot	80
	<i>Problems with Copilot Quick Measures</i>	80
12.5	Example 1: Listing Selected Items	81
	<i>Creating the Slicer Selection Quick Measure</i>	81
	<i>Displaying the Slicer Selection</i>	82
	<i>Creating a Measure to Show the Visual Title</i>	82
	<i>Showing a Dynamic Title</i>	82
12.6	Example 2: Line Chart Averages	83
	<i>Creating the Base Measures</i>	83
	<i>Reviewing the DAX</i>	84
	<i>Creating the Final Measure</i>	84
	<i>The Final Chart</i>	84
12.7	Example 3: Running Totals	85

13	Q&A VISUALS	Page
13.1	The Q&A Visual	86
	<i>Creating a Q&A Visual</i>	86
	<i>Using a Q&A Visual</i>	86
	<i>Ambiguous Terms</i>	87
	<i>Making the Suggested Visual Permanent</i>	87
13.2	Formatting Q&A Visuals	88
13.3	Improving the Q&A Experience	89
	<i>Q&A Setup</i>	89
	<i>Adding Synonyms Directly</i>	90
	<i>Adding Synonyms by Teaching Q&A</i>	91
	<i>Adding Suggested Questions</i>	92

14	NARRATIVES AND EXPLANATIONS	Page
14.1	Smart Narratives	93
	<i>What are Smart Narratives?</i>	93
	<i>Creating a Smart Narrative</i>	93
	<i>Formatting Values Generated</i>	94
	<i>Smart Narratives are Dynamic</i>	94
14.2	Explaining Changes	95

15	BUTTONS AND SHAPES	Page
15.1	Overview	96
	<i>Types of Clickable Objects</i>	96
	<i>Types of Action</i>	96
15.2	Adding Clickable Shapes	97
15.3	Adding Clickable Images	97
15.4	Adding Clickable Buttons	99
	<i>Adding the Button</i>	99
	<i>Setting Default, Hover, Selection and Disabled Effects</i>	99
	<i>Formatting Buttons</i>	100

16	BOOKMARKS	Page
16.1	Examples of Bookmarks	101
16.2	Our Case Study	102
	<i>Planning the Bookmarks Needed</i>	102
16.3	Creating Bookmarks	103
	<i>Step 1 - Naming your Visuals</i>	103
	<i>Step 2 - Displaying the Bookmarks Pane</i>	104
	<i>Step 3 - Creating Bookmarks</i>	104
16.4	Configuring your Bookmarks	105
	<i>Step 1 – Data Settings</i>	105
	<i>Step 2 – Display Settings</i>	105
	<i>Step 3 – Update the Bookmark</i>	106
	<i>Step 4 - Linking to your Bookmarks</i>	106
16.5	Linking to Pages using Bookmarks	107
	<i>Creating the Home Bookmark</i>	107
16.6	Bookmark Navigators	108
	<i>Assigning Bookmarks to Groups</i>	108
	<i>Adding a Bookmark Navigator</i>	109
	<i>Formatting the Selected Bookmark</i>	109
	<i>Controlling Deselection Behaviour</i>	110

TABLE OF CONTENTS (4 of 5)

17	IDEAS FOR BOOKMARKS	Page
17.1	Idea 1 - Default Slicer Values	111
	<i>Creating the Slicers and Action Button</i>	111
	<i>Setting your Default Slicers</i>	112
	<i>Creating and Customising your Bookmark</i>	112
	<i>Attaching the Bookmark to your Action Button</i>	112
17.2	Idea 2 - Pictures to Filter Charts	113
	<i>Setting the Scene</i>	113
	<i>Setting the Bookmarks to Filter</i>	114
	<i>Attaching the Bookmarks to the Images</i>	114
17.3	Idea 3 - Sort Icons	115
	<i>Creating the Buttons</i>	115
	<i>Creating the Bookmarks</i>	116
	<i>Configuring the Bookmarks</i>	116
17.4	Idea 4 - Pop-Up Buttons	117
	<i>Creating Each Help Message</i>	117
	<i>Creating the Bookmarks</i>	118
	<i>Assigning Actions to the Bookmarks</i>	118
17.5	Idea 5 - Slide-out Filters	119
	<i>The Source for this Idea</i>	119
	<i>Creating the Visuals</i>	120
	<i>Creating the Bookmarks</i>	120
	<i>Creating the Action Buttons</i>	120

18	PAGE NAVIGATION	Page
18.1	Overview	121
18.2	Page Navigators	122
	<i>Creating Page Navigators</i>	122
	<i>Formatting Page Navigators</i>	123
	<i>Displaying Page Navigators as Grids</i>	123
18.3	Simple Custom Page Navigators	124
18.4	Dynamic Page Navigation	125
	<i>Step 1 – Creating (and Editing) the Table</i>	125
	<i>Step 2 – Creating the Slicer</i>	126
	<i>Step 3 – Creating the Button</i>	126
	<i>Step 4 – Setting the Button's Action and Tooltip</i>	126
	<i>Step 5 – Showing your Menu on All Pages</i>	127

19	ADVANCED DRILL-THROUGH	Page
19.1	Our Example	128
19.2	Creating the Basic Drill-Through	129
	<i>Creating the Required Pages and Visuals</i>	129
	<i>Setting the Drill-Through Field(s)</i>	129
	<i>Controlling Filtering</i>	129
	<i>Hiding Drill-through Filters</i>	130
	<i>Creating a Back Button</i>	131
19.3	Three Ways to Drill Through	132
	<i>Method 1 - Delayed Tooltips</i>	132
	<i>Method 2 – Right-Mouse Menu</i>	132
	<i>Method 3 – Enabling Drill-Through</i>	132
19.4	Creating a Drill-Through Button	133
	<i>Creating the Buttons</i>	133
	<i>Configuring each Button's Disabled Appearance</i>	134
	<i>Creating a Measure for Each Enabled Button's Text</i>	134
	<i>Showing this Measure's Text on Each Button</i>	135
19.5	Conditionally Disabling Buttons	136
19.6	Categorised versus Summarised	136
19.7	Cross-Report Drill-through	137
	<i>Step 1 – Enable Cross-Report Drill-through</i>	138
	<i>Step 2 – Create a Drill-through Target Report</i>	138
	<i>Step 3 – Publish the Reports</i>	139
	<i>Step 4 – Test the Drill-through Feature</i>	139

20	CUSTOM VISUALS	Page
20.1	Examples of Custom Visuals	140
20.2	Adding Custom Visuals	141
20.3	Possible Disadvantages of Custom Visuals	142
	<i>Some Formatting Features not Supported</i>	142
	<i>Difficulty of Use</i>	142
	<i>Cost and Reliability</i>	142
20.4	Example 1 – Word Cloud	143
20.5	Example 2 – Play Axis	144
	<i>How it Works</i>	144
	<i>Setting the Play Axis Slicer Field</i>	144
	<i>Animation Settings</i>	145
	<i>Formatting the Caption</i>	145
20.6	Example 3 - Aquarium	145
20.7	Example 4 – Cylindrical Gauge	147

TABLE OF CONTENTS (5 of 5)

21	INFOGRAPHICS	Page
21.1	Assembling what you Need	148
21.2	Creating a Picture Chart	149
	<i>Step 1 – Creating the Chart</i>	149
	<i>Step 2 – Editing the Chart</i>	149
	<i>Step 3 – Adding your Images</i>	150
	<i>Step 4 – Assigning Pictures to Data Series</i>	151
	<i>Step 5 - Stacking your Pictures</i>	151
	<i>Step 6 – Set your Picture Unit Size</i>	152
	<i>Step 7 - Adding Text Labels</i>	153

22	SYNOPTIC PANELS	Page
22.1	Overview	154
22.2	Creating the Image Map	155
	<i>Adding an Image</i>	155
	<i>Filling In your Picture (Colour Dropper)</i>	156
	<i>Filling in your Picture (Drawing Shapes)</i>	156
	<i>Naming the Areas</i>	157
	<i>Saving your Image</i>	157
22.3	Creating Synoptic Panels	157
22.4	Formatting Synoptic Panels	159
	<i>The Toolbar</i>	159
	<i>Colours</i>	159
	<i>Data Labels</i>	160
	<i>Using States to Show Colours</i>	161

23	MOBILE VIEW	Page
23.1	Avoiding Mobile View	162
	<i>The Power BI App</i>	162
	<i>Changing your Canvas Size</i>	162
23.2	Using Mobile View	163





24	THEMES	Page
24.1	Changing Themes	164
	<i>Choosing an Existing Theme</i>	164
	<i>Importing a Theme</i>	165
24.2	Creating a Corporate Theme (Easy Way)	166
	<i>Step 1 – Getting a Starting Point</i>	166
	<i>Step 2 – Tweaking your Theme</i>	166
	<i>Step 3 - Saving your Theme</i>	167
24.3	Creating a Corporate Theme (Hard Way)	168
	<i>Step 1 – Understand the Main Theme Parts</i>	168
	<i>Step 2 – Loading your Theme in a JSON Editor</i>	169
	<i>Step 3 – Saving your Changes</i>	169
	<i>Step 4 – Making Themes More Specific</i>	170

CHAPTER 1 - ADVANCED TABLES

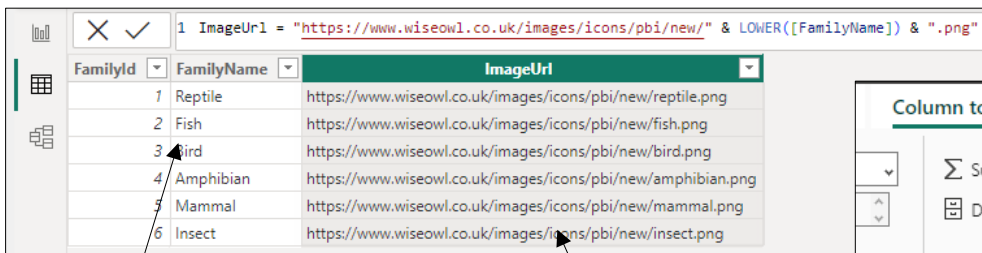
1.1 Showing Images in Tables

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

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> .

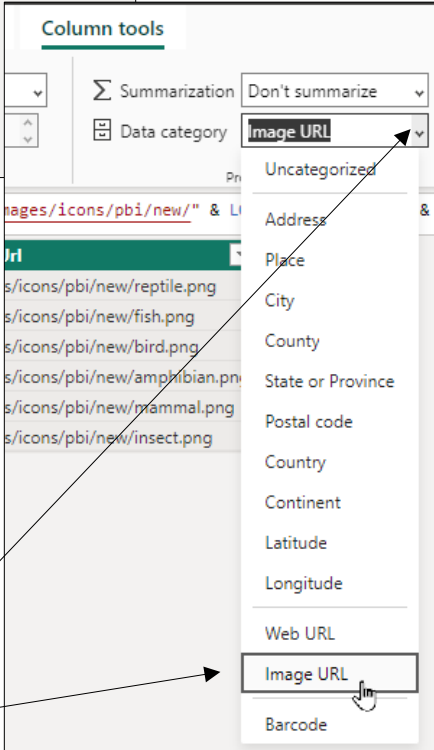
Family	Total qty	ImageUrl
Amphibian	1,603	
Bird	7,538	
Fish	1,258	
Insect	272	

To get this to work, follow the steps below:



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

FamilyId	FamilyName	ImageUrl
1	Reptile	https://www.wiseowl.co.uk/images/icons/pbi/new/reptile.png
2	Fish	https://www.wiseowl.co.uk/images/icons/pbi/new/fish.png
3	Bird	https://www.wiseowl.co.uk/images/icons/pbi/new/bird.png
4	Amphibian	https://www.wiseowl.co.uk/images/icons/pbi/new/amphibian.png
5	Mammal	https://www.wiseowl.co.uk/images/icons/pbi/new/mammal.png
6	Insect	https://www.wiseowl.co.uk/images/icons/pbi/new/insect.png



Column tools

Summarization: Don't summarize

Data category: **Image URL**

Uncategorized

Address

Place

City

County

State or Province

Postal code

Country

Continent

Latitude

Longitude

Web URL

Image URL

Barcode

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.

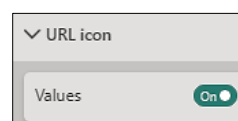
The screenshot shows the Power BI Desktop ribbon with the 'Column tools' tab active. The 'Data category' dropdown is open, and 'Web URL' is selected. The table from the previous image is visible in the background.

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

Urls

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

Altrincham Retail Park

Year

2023

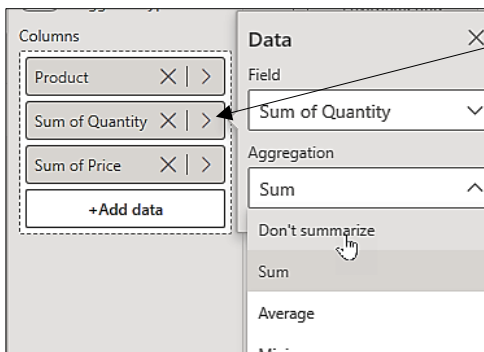
Sales for this centre		
Product	Sum of Quantity	Sum of Price
Englebert	1	£3.95
Imogen	12	£11.97
Yoko	1	£12.99

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:



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	X >
Quantity	X >
Price	X >

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			
Whole number	\$ % 0	Don't summarize			
SaleDate	ProductId	Centred	Quantity	Price	
5763 Friday 04 January 2019	1	252	2	£8.	
6093 Monday 07 January 2019	1	341	2	£8.	
7158 Sunday 13 January 2019	1	360	2	£8.	
7637 Thursday 17 January 2019	1	309	2	£8.	
7851 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**.

Name	SaleId	
Data type	Text	
Whole number		
Decimal number		
Fixed decimal number		
Date/time		
Date		
Time		
Text		
True/false		

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!

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:

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).

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.

Choose a region

East Midlands

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

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



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**:

Choose a habitat

Desert

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

Grasslands Forest Sky

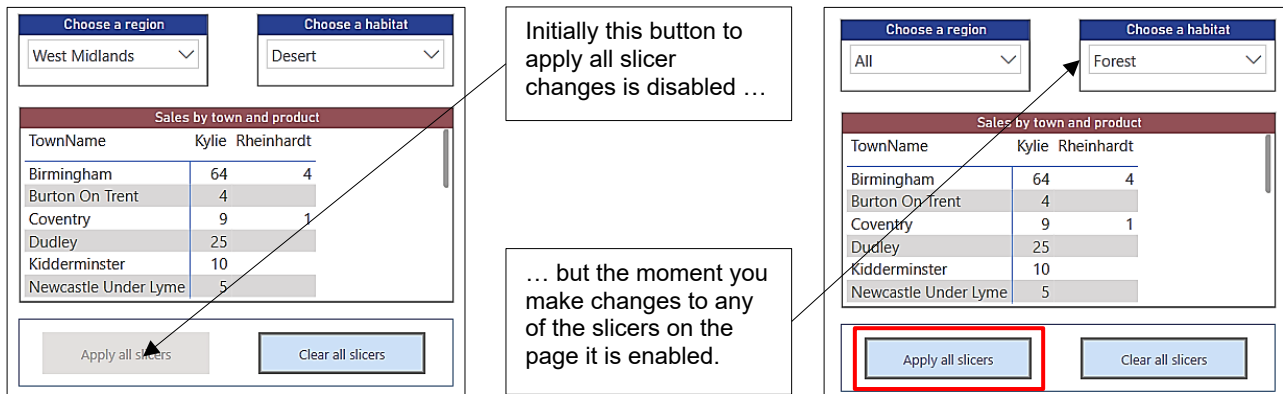
Fresh water Salt water Desert

Urban

2.2 Applying/Clearing All Slicers

How Applying/Clearing Slicers Works

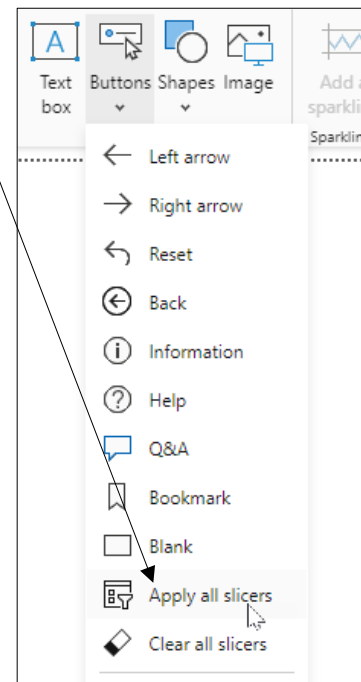
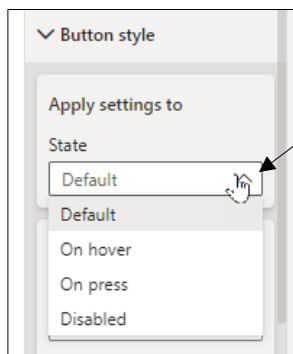
Refreshing all your visuals every time you change a slicer's filtering can take a while. You can add buttons to accumulate all the changes you've made, and apply (or clear) them in one go:



Adding the Buttons

To add these buttons:

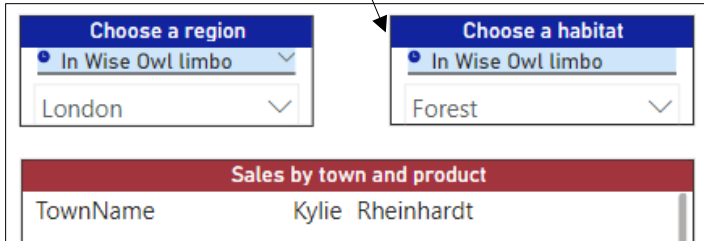
- Choose to add one of the buttons from the Power BI Insert menu (here we're adding a button to apply any slicer changes the user has made).



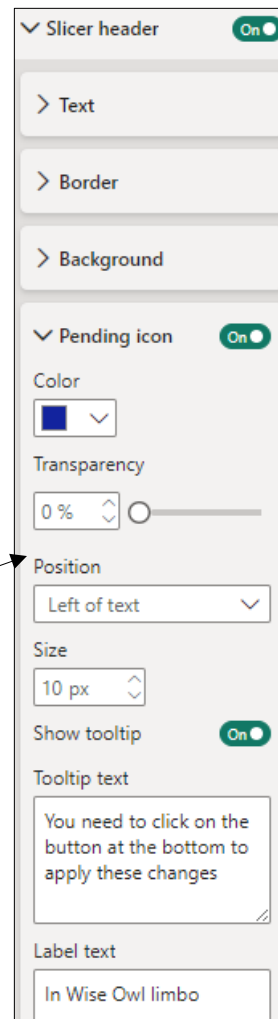
Showing a Pending Icon

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.



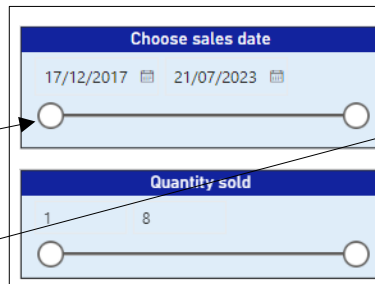
2.3 Tricks with Slicers

Changing Date and Numeric Slicers

Don't like circles? Change them!

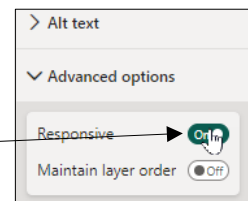
Normally the end points of date and numeric slicers show up as circles ...

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



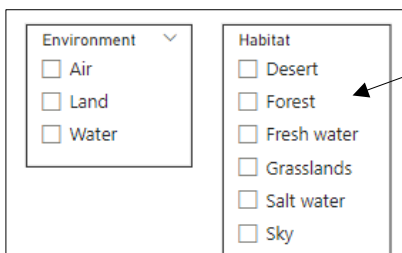
To make this change, tell Power BI to stop making your slicers *responsive*:

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).

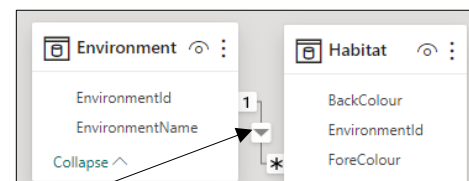


Slicer Interactions

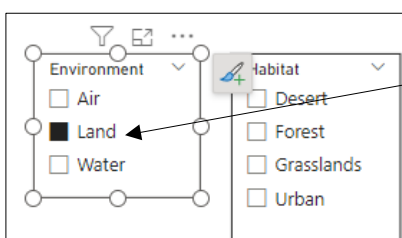
How one slicer affects another depends on the configuration of your table relationships:



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

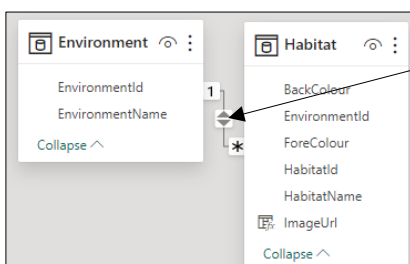
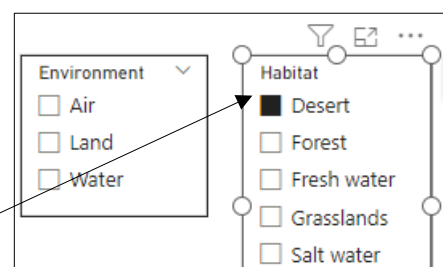


The cross filter direction of this relationship is single, as shown by the arrow.

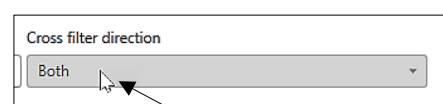


When the cross filter direction of the relationship is single, clicking an item in the environment slicer filters the habitat slicer, but ...

... 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.

Blank lined area for writing.



Blank lined area for writing.



Blank lined area for writing.



Blank lined paper for writing.



WiseOwl
Training

Blank lined paper for writing.



WiseOwl
Training

Blank lined paper for writing.



WiseOwl
Training

Blank lined paper for writing.



Blank lined paper for writing.



Blank lined paper for writing.






































Wise Owl
Training

Blank lined paper for writing.



Wise Owl
Training

What we do!

		Basic training	Advanced training	Systems / consultancy
Office	Microsoft Excel			
	VBA macros			
	Office Scripts			
	Microsoft Access			
Power BI, etc	Power BI and DAX			
	Power Apps			
	Power Automate (both)			
SQL Server	SQL			
	Reporting Services			
	Report Builder			
	Integration Services			
	Analysis Services			
Coding	Visual C#			
	VB programming			
	MySQL			
	Python			



WiseOwl
Training

