# 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 |
| | *Designating Columns as URLs* | 8 |
| | *Displaying Other Fields as Links* | 9 |
| 1.3 | Sorting by Multiple Columns | 10 |
| 1.4 | Preventing Data Aggregation | 11 |
| | *Preventing Summarising for Single Fields* | 11 |
| | *Changing the Default Summarisation Options* | 11 |

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

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

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

| 5 | CONDITIONAL FORMATTING | Page |
|---|---|---|
| 5.1 | Conditional Formatting | 26 |
| 5.2 | Applying Conditional Formatting | 27 |
| | *Setting Conditional Formatting* | 27 |
| | *Changing Conditional Formatting* | 27 |
| 5.3 | Gradient Effects | 28 |
| | *Adding a Middle Colour* | 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 |
| | *Creating our Card* | 34 |
| | *Applying Title Dynamically Formatting* | 35 |
| | *Applying Other Dynamic Formatting* | 36 |
| | *Copying our Visual* | 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 |
| | *Applying Basic Tooltips* | 39 |
| | *Formatting Tooltips* | 39 |
| | *Standardising Tooltip Formatting* | 40 |
| | *Adding Fields to Tooltips* | 41 |
| 7.4 | Static Report Page Tooltips | 42 |
| | *Step 1 – Create the Tooltip Page* | 42 |
| | *Step 2 – Setting the Page Size* | 43 |
| | *Step 3 – Hiding your Report* | 43 |
| | *Step 4 – Creating the Tooltip Report* | 43 |
| | *Step 5 – Assigning a Report Page to a Tooltip* | 44 |
| 7.5 | Dynamic Report Page Tooltips | 45 |
| | *Step 1 – Creating the Tooltip Page* | 45 |
| | *Step 2 – Adding Content to the Tooltip Page* | 45 |
| | *Step 3 – Assigning Fields to the Tooltip Report Page* | 46 |
| | *Step 4 – Choosing By Category or Summarized* | 46 |
| | *Step 5 – Choosing whether to Keep Filters* | 47 |
| | *Step 6 – Assigning your Tooltip Report Page to a Visual* | 47 |
| | *Step 7 – Customising the Title* | 48 |
| 7.6 | Visual Header (Help) Tooltips | 49 |
| | *Step 1 – Creating the Tooltip Page* | 49 |
| | *Step 2 – Creating the Report Page for the Tooltip* | 49 |
| | *Step 3 – Assigning your Page to the Visual Header* | 50 |

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

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

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

| 11 | ADVANCED CHARTS | Page |
|---|---|---|
| 11.1 | Ribbon Charts | 72 |
| 11.2 | Funnel Charts | 72 |
| 11.3 | Waterfall Charts | 73 |
| | *Parts of a Waterfall Chart* | 74 |
| | *Creating a Basic Waterfall Chart* | 75 |
| | *Showing Breakdowns* | 75 |


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# TABLE OF CONTENTS (3 of 5)


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

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

| 14 | NARRATIVES AND EXPLANATIONS | Page |
|---|---|---|
| 14.1 | Smart Narratives | 93 |
| | *What are Smart Narratives?* | 93 |
| | *Creating a Smart Narrative* | 93 |
| | *Formatting Values Generated* | 94 |
| | *Smart Narratives are Dynamic* | 94 |
| 14.2 | Explaining Changes | 95 |

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

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

# TABLE OF CONTENTS (4 of 5)


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

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

| 19 | ADVANCED DRILL-THROUGH | Page |
|---|---|---|
| 19.1 | Our Example | 128 |
| 19.2 | Creating the Basic Drill-Through | 129 |
| | *Creating the Required Pages and Visuals* | 129 |
| | *Setting the Drill-Through Field(s)* | 129 |
| | *Controlling Filtering* | 129 |
| | *Hiding Drill-through Filters* | 130 |
| | *Creating a Back Button* | 131 |
| 19.3 | Three Ways to Drill Through | 132 |
| | *Method 1 - Delayed Tooltips* | 132 |
| | *Method 2 – Right-Mouse Menu* | 132 |
| | *Method 3 – Enabling Drill-Through* | 132 |
| 19.4 | Creating a Drill-Through Button | 133 |
| | *Creating the Buttons* | 133 |
| | *Configuring each Button's Disabled Appearance* | 134 |
| | *Creating a Measure for Each Enabled Button's Text* | 134 |
| | *Showing this Measure's Text on Each Button* | 135 |
| 19.5 | Conditionally Disabling Buttons | 136 |
| 19.6 | Categorised versus Summarised | 136 |
| 19.7 | Cross-Report Drill-through | 137 |
| | *Step 1 – Enable Cross-Report Drill-through* | 138 |
| | *Step 2 – Create a Drill-through Target Report* | 138 |
| | *Step 3 – Publish the Reports* | 139 |
| | *Step 4 – Test the Drill-through Feature* | 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 |
| | *Some Formatting Features not Supported* | 142 |
| | *Difficulty of Use* | 142 |
| | *Cost and Reliability* | 142 |
| 20.4 | Example 1 – Word Cloud | 143 |
| 20.5 | Example 2 – Play Axis | 144 |
| | *How it Works* | 144 |
| | *Setting the Play Axis Slicer Field* | 144 |
| | *Animation Settings* | 145 |
| | *Formatting the Caption* | 145 |
| 20.6 | Example 3 - Aquarium | 145 |
| 20.7 | Example 4 – Cylindrical Gauge | 147 |


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# TABLE OF CONTENTS (5 of 5)


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

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

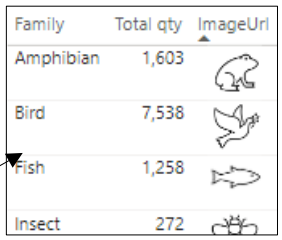
| 23 | MOBILE VIEW | Page |
|---|---|---|
| 23.1 | Avoiding Mobile View | 162 |
| | *The Power BI App* | 162 |
| | *Changing your Canvas Size* | 162 |
| 23.2 | Using Mobile View | 163 |

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

# CHAPTER 1 - ADVANCED TABLES

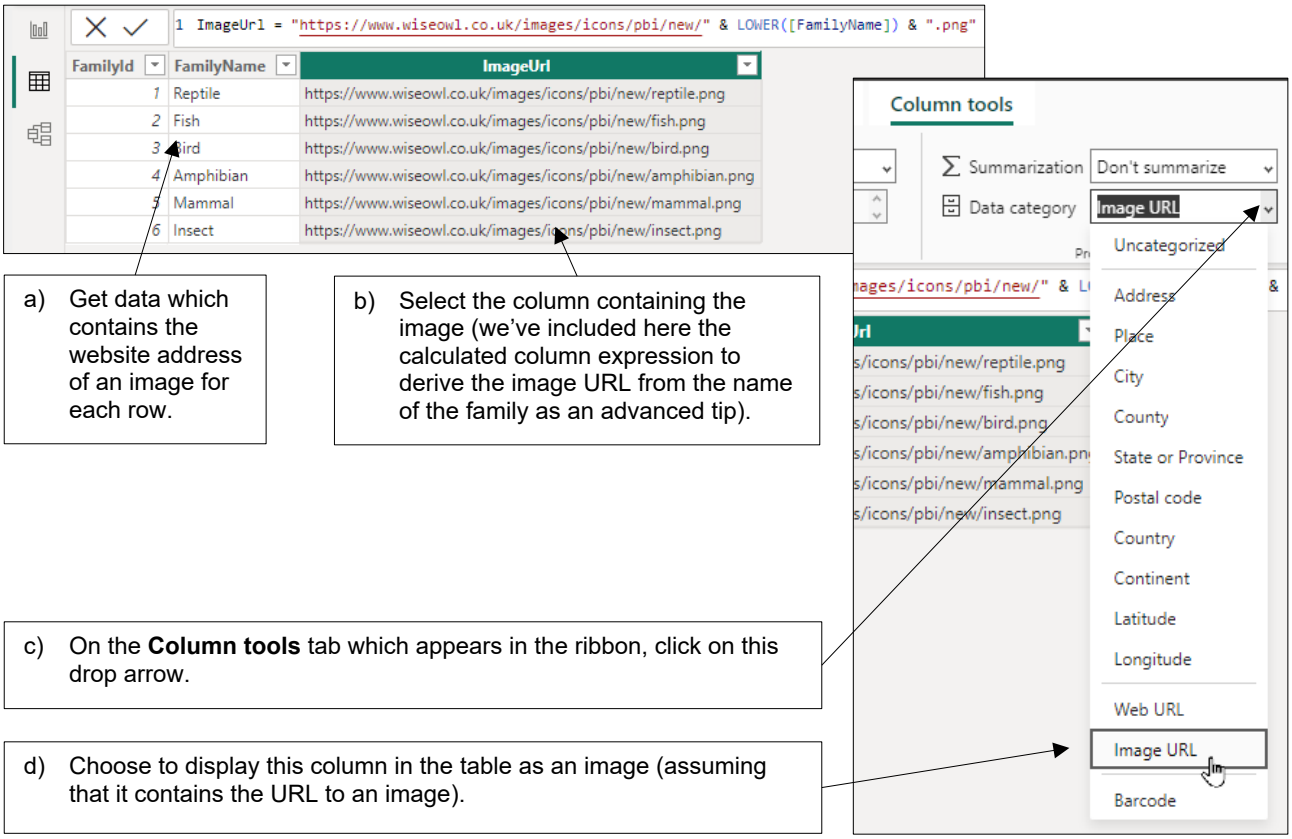
## 1.1 Showing Images in Tables

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 .

To get this to work, follow the steps below:




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

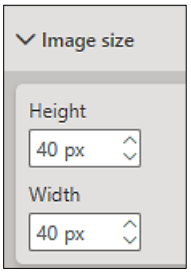
b) Select the column containing the image (we've included here the calculated column expression to derive the image URL from the name of the family as an advanced tip).

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).

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## 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:

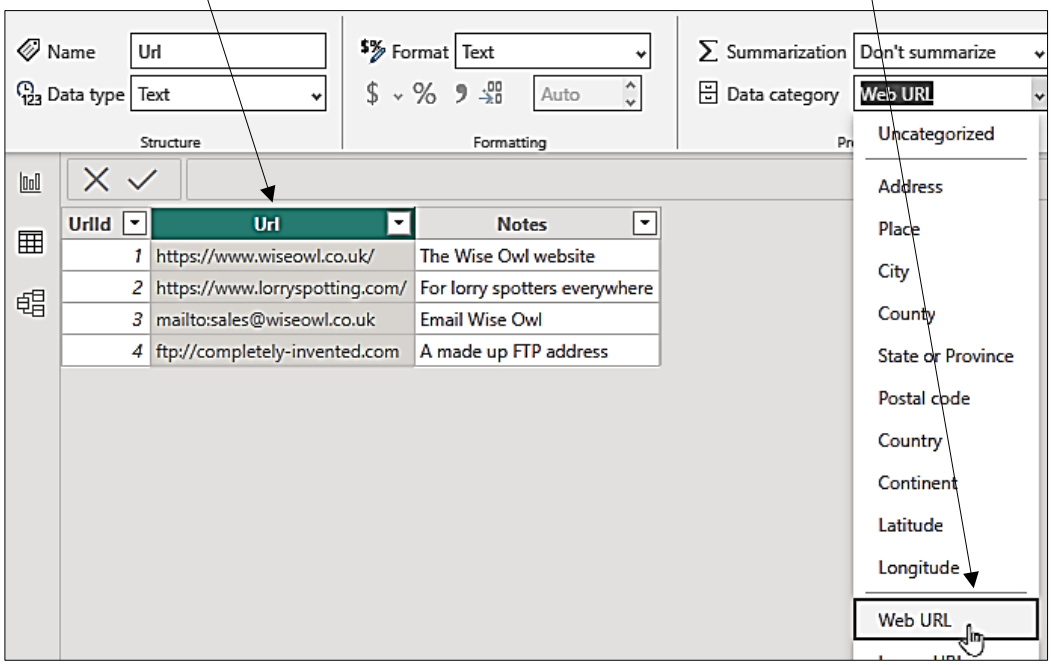
| UrlId | Url | Notes |
|---|---|---|
| 1 | https://www.wiseowl.co.uk/ | The Wise Owl website |
| 2 | https://www.lorryspotting.com/ | For lorry spotters everywhere |
| 3 | mailto:sales@wiseowl.co.uk | Email Wise Owl |
| 4 | ftp://completely-invented.com | A made up FTP address |

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

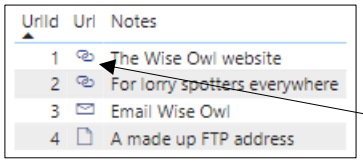
You can then designate one of the columns as a URL:

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

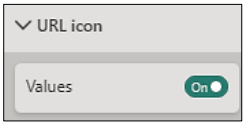
b) Choose this option on the **Column tools** tab which appears in the Power BI Desktop ribbon to designate this as a clickable hyperlink.




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).




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:

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## 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.

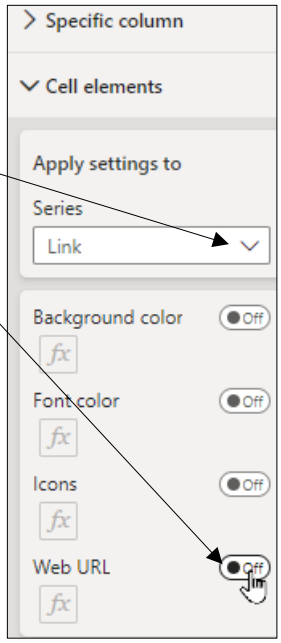
To do this you set the **Web URL** property of a field to be a hyperlink column:

| 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.



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!*

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## 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 | Enviror |
|---|---|
| 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.*

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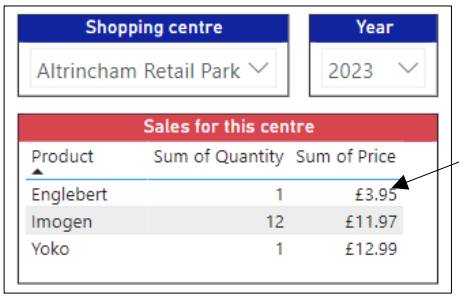
## 1.4 Preventing Data Aggregation

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.



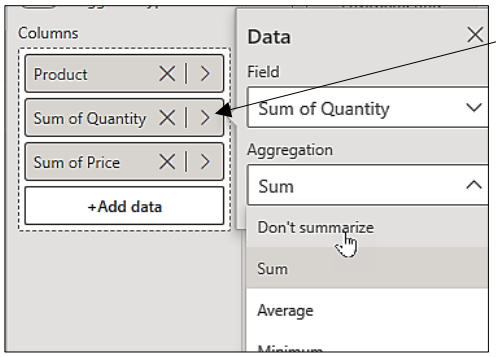

Here Power BI automatically sums the two numerical fields for each product, but what if we want to list each sale row separately to get this?

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 |

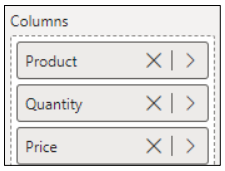
### Preventing Summarising for Single Fields

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:

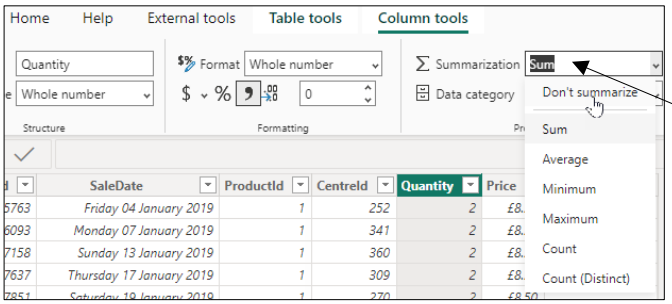



b) Power BI now groups the data by each product's price and quantity, rather than adding these numbers together.

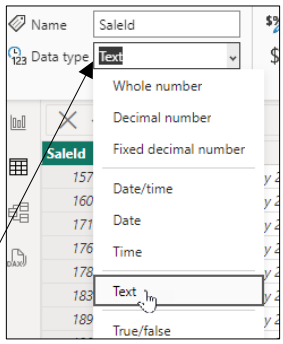
| Product | Quantity | Price |
|---|---|---|
| Englebert | 1 | £3.95 |
| Imogen | 2 | £3.99 |
| Imogen | 3 | £3.99 |

### Changing the Default Summarisation Options

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




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!

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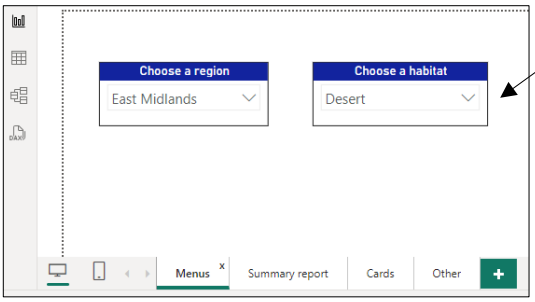
# CHAPTER 2 - ADVANCED SLICERS

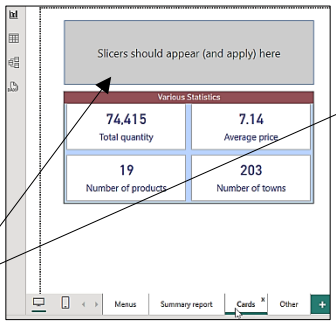
## 2.1 Sync Slicers

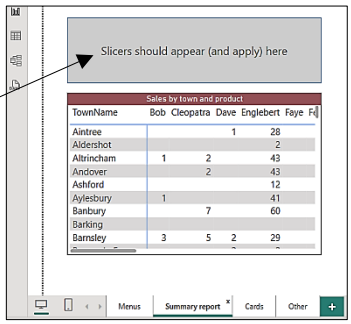
### What are Sync Slicers?

*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 …

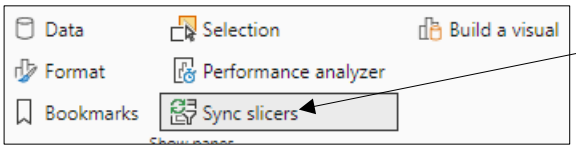



… on certain pages of your report (here the **Summary report** and **Cards** pages).

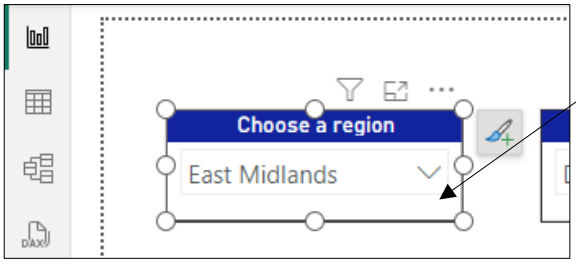
### Viewing Sync Slicers

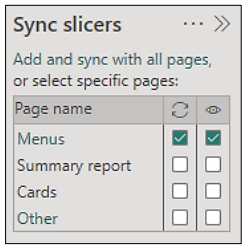
You can configure sync slicers as follows:




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

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

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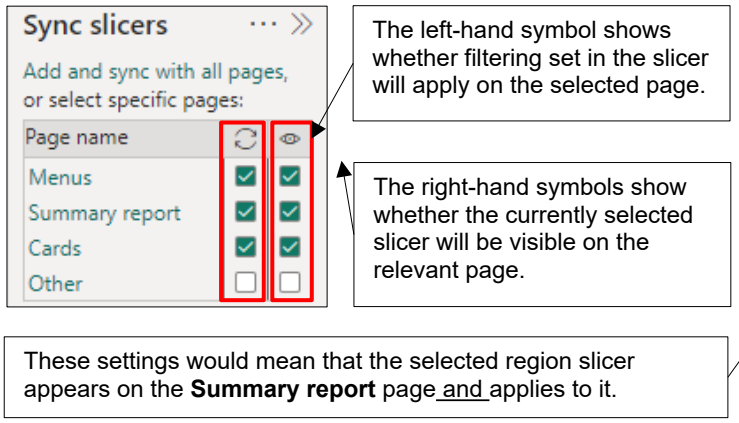
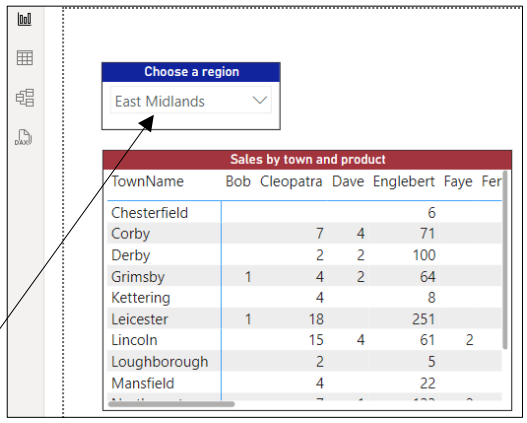
## What the Symbols Mean

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




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.

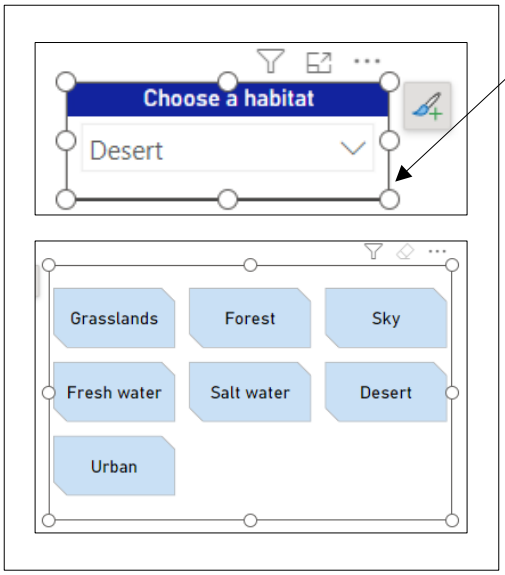



These settings would mean that the selected region slicer appears on the **Summary report** page and applies to it.

*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).*

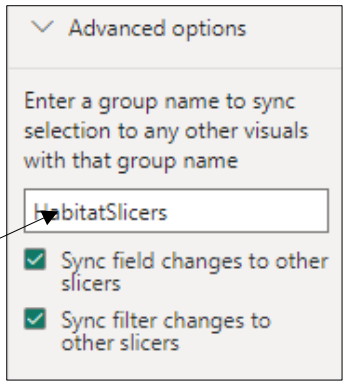
## Grouping Slicers

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.

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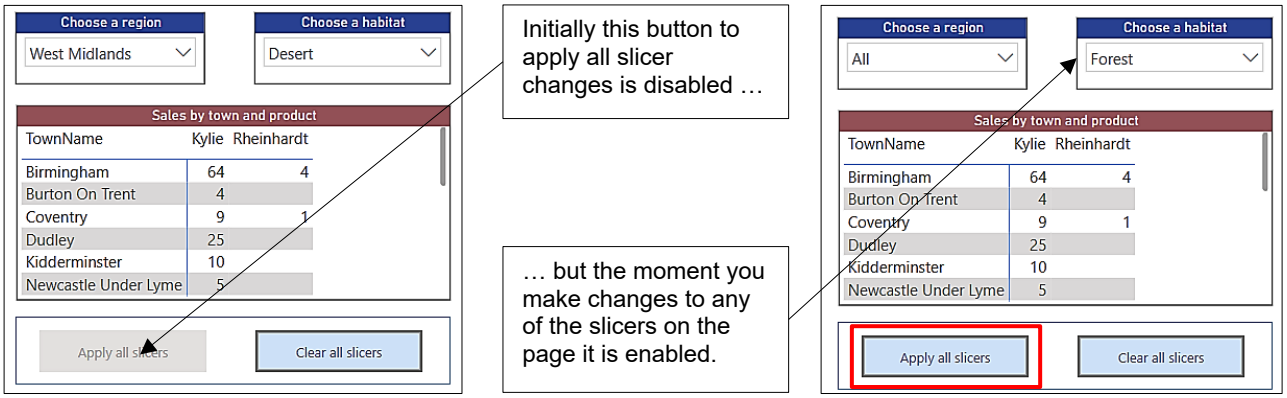
## 2.2 Applying/Clearing All Slicers

### How Applying/Clearing Slicers Works

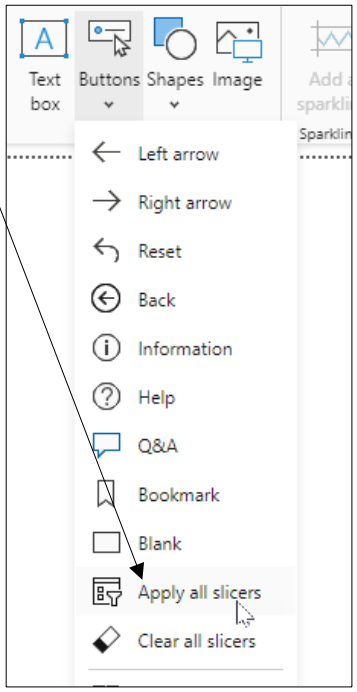
Refreshing all your visuals every time you change a slicer's filtering can take a while. You can add buttons to accumulate all the changes you've made, and apply (or clear) them in one go:

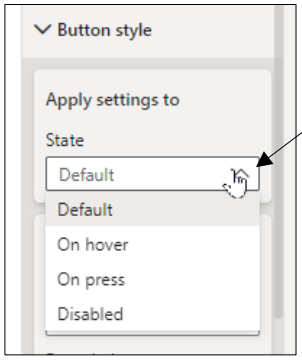



### Adding the Buttons

To add these buttons:

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).

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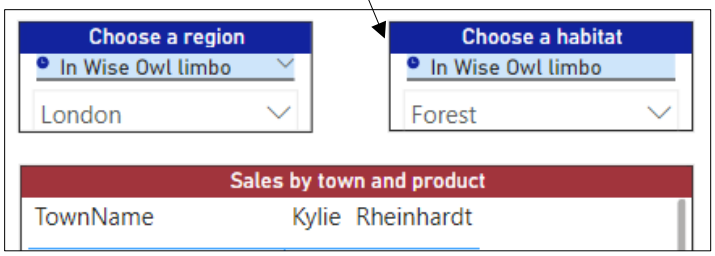
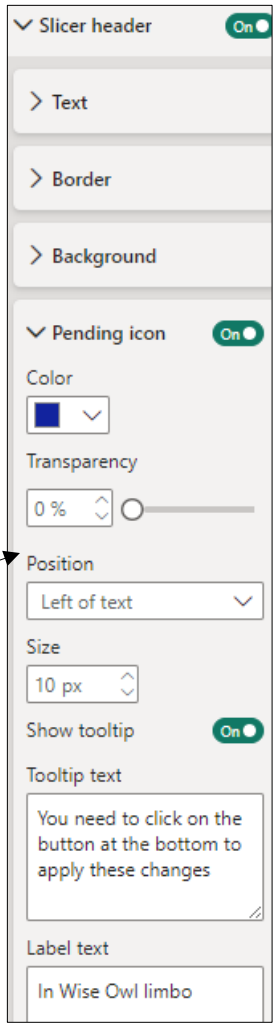
## Showing a Pending Icon

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.

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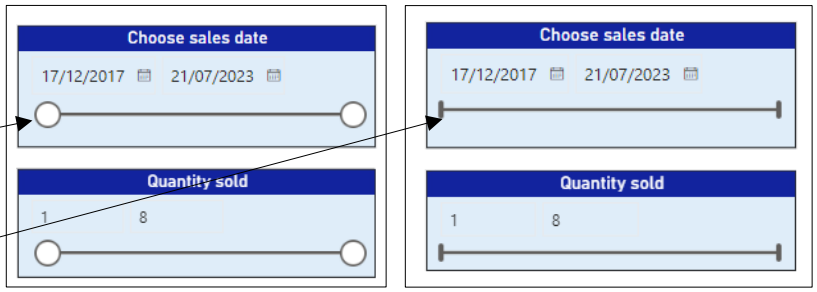
## 2.3 Tricks with Slicers

### Changing Date and Numeric Slicers

Don't like circles? Change them!

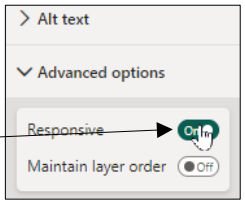
Normally the end points of date and numeric slicers show up as circles …

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



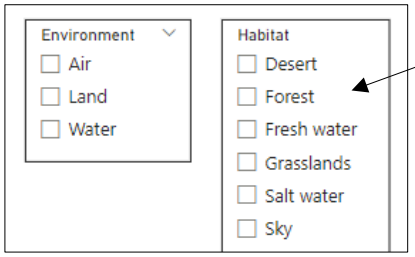

To make this change, tell Power BI to stop making your slicers *responsive*:

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).

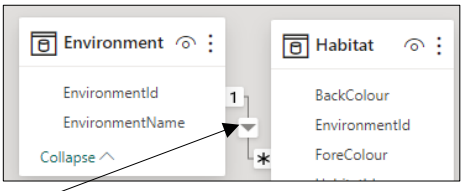



### Slicer Interactions

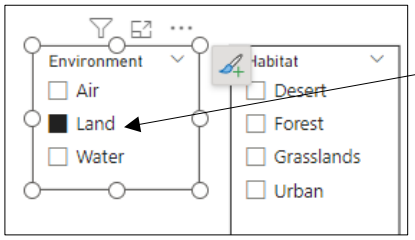
How one slicer affects another depends on the configuration of your table relationships:




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

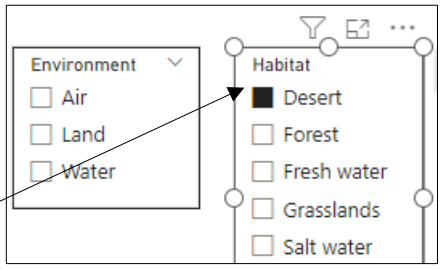


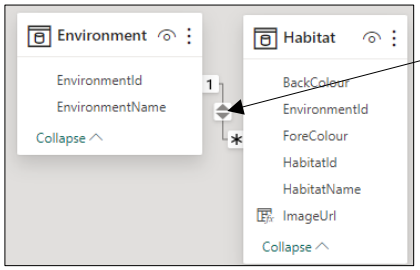

The cross filter direction of this relationship is single, as shown by the arrow.



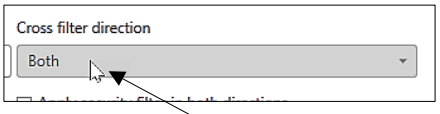

When the cross filter direction of the relationship is single, clicking an item in the environment slicer filters the habitat slicer, but …

… 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.

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