ANALYTICAL MODULE

HELP FILE 2

Contents

HELP FILE 2 - PBI reports

A Power BI report is a multi-perspective view into a dataset containing visuals that represent different findings and insights from that dataset. A report may have a single visual or pages full of visuals. Depending on the sets of pages developed for your organization and your role, you will be able to visualize a different page.

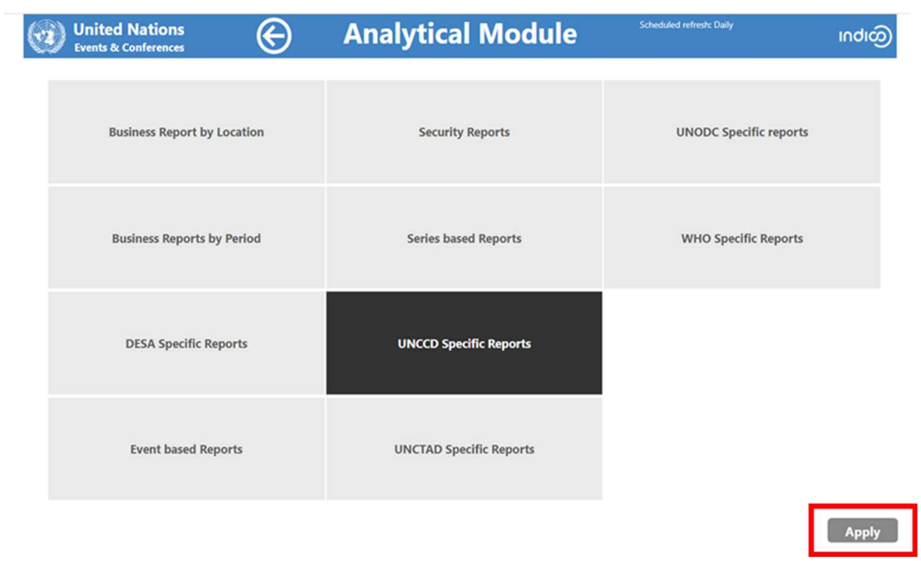
Depending on the access rights you were granted, you will be able to visualize different sets of data related to the entire organization you belong to, to a sub-category of data or only to one or more events.

Navigation Pane

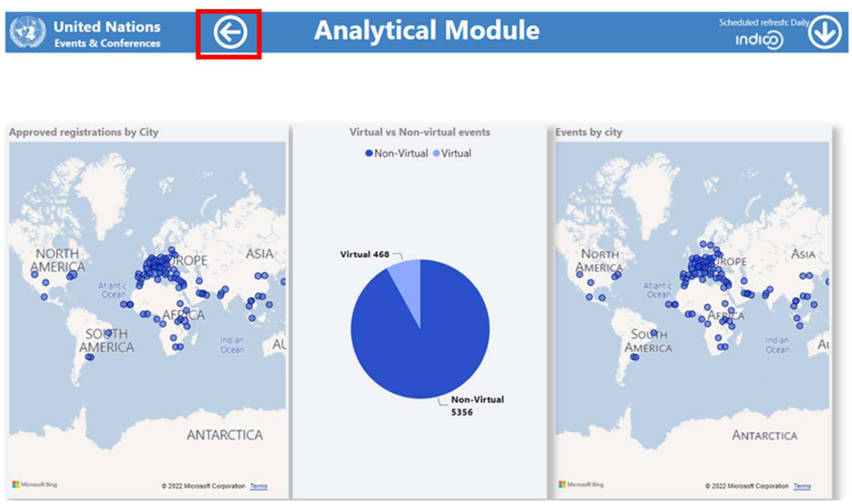
The Indico.UN AM 2022 includes several pages:

- Business report by period – two sub-pages: this set of high-level visuals and cards is mainly intended for conference management. It provides an overview of the client's key event details by year and month.
- Business report by location – one page: this set of high-level visuals is mainly intended for conference management. It provides an overview of the client's events footprint.
- Security reports - two sub-pages: this set of visuals is mainly intended for Security Officers or Conference Managers. It provides detailed figures by event duty station and/or venue. The visuals are both backward and forward looking.
- Event based reports – four sub-pages: this set of visuals is mainly intended for Event Managers. It provides detailed figures by event. The visuals focus on event approved registrations, approved VIPs, badges printed and check-ins.
- Series based reports – three sub-pages: this set of visuals is mainly intended for Event Managers organizing recurrent events. It provides detailed figures by event-series. The visuals focus on series' approved registrations, approved VIPs.
- Client-specific reports: this set of visuals are specifically created ad-hoc for clients with specific reporting needs that are not covered by the reports listed above.

Select the desired set of reports and click **Apply**.



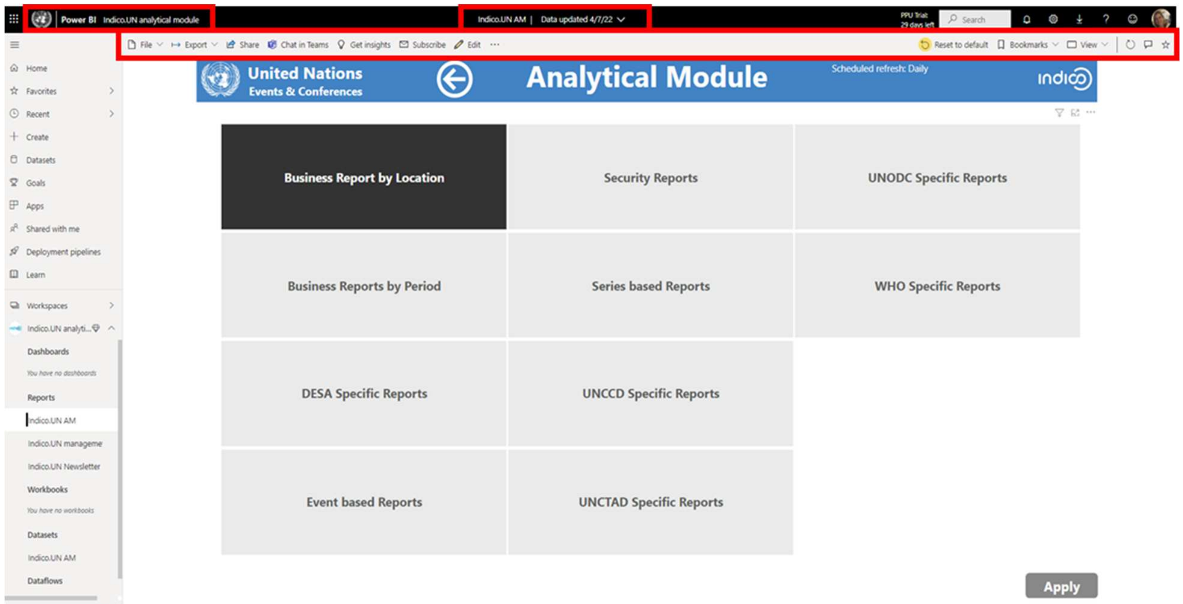
Click on the **Back** button to navigate back to the Navigation pane.



PBI banners and bars

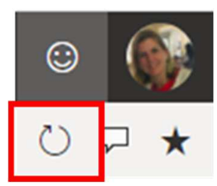
The Power BI banner displays the **name** of the report and the last updated **date**. It also shows the name of the report owner.

The action bar contains actions you may take on the report. For example, you may add a comment, view a bookmark, or export data from the report. Select **More options** (...) to reveal a list of additional report functionalities.



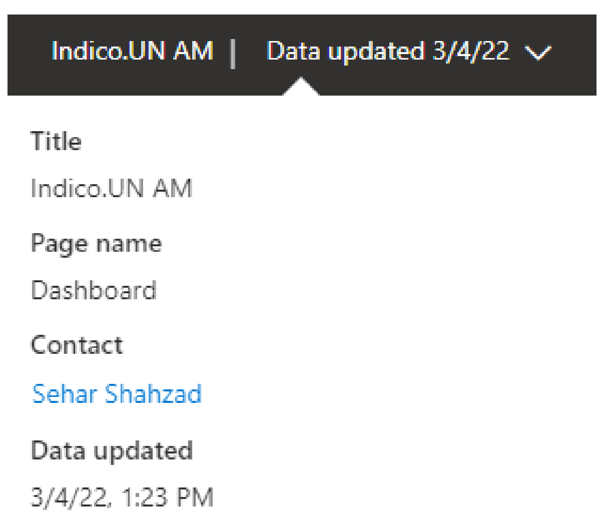
Refresh

The Analytical module reports are refreshed every morning at 7am (CET). To ensure that the report is getting the latest available figures, click on the refresh button.



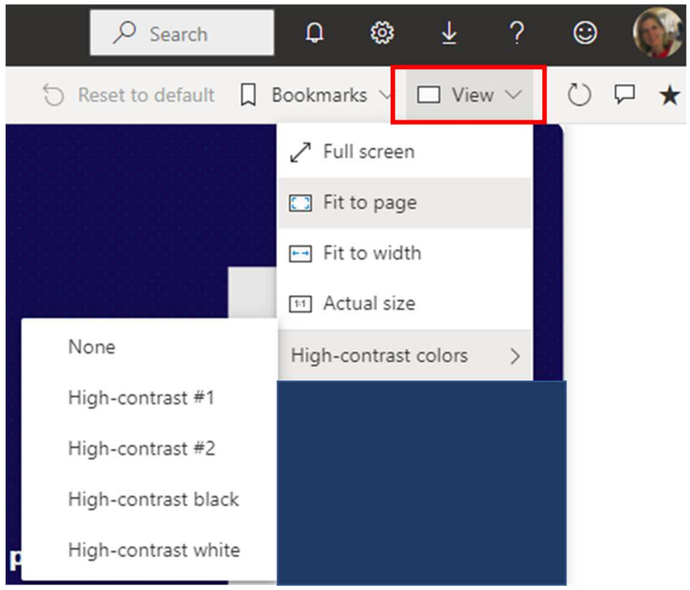
Power BI adds a date and time when content is published, shared, updated, and refreshed.

To check the exact date and time of the latest refresh, click on the icon in the **middle of the Power BI banner**.



Change the display of a report page

You may view reports on many different devices with varying screen sizes and aspect ratios. You may change the display of a report page to accommodate your needs.



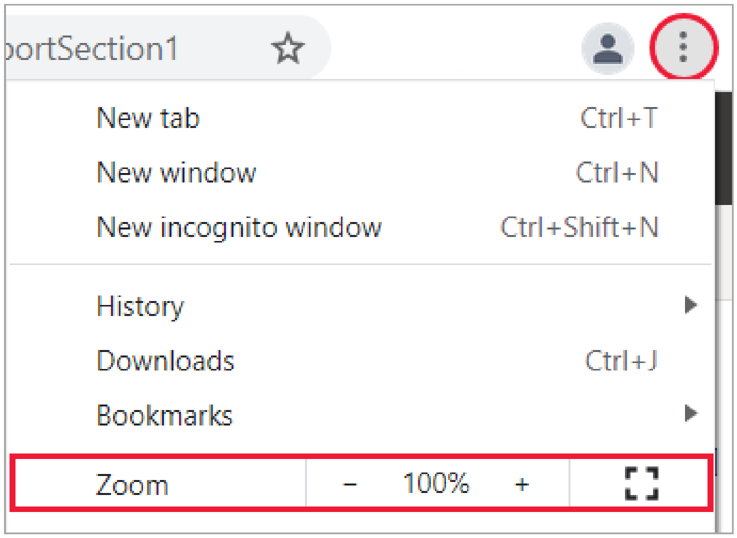
Options in the **View** menu give you flexibility to display report pages at a size and width you choose:

- Select **View** > **Actual size** to increase the size of the report page. Use the scroll bars to move around the report.
- Another option is to fit the report to your screen width by selecting **Fit to width**.
- If you don't want any scroll bars but want to make the best use of your screen size, select **Fit to Page**.
- You may also choose from four **High contrast colors**: High contrast #1, High contrast #2, High contrast black, and High contrast white. It's an accessibility feature that you may use so that persons with impaired vision may view the reports better.
- **Full screen** displays your report page without menu bars and headers. Full screen may be a good choice for smaller screens where details may be hard to see or when projecting report pages onto larger screens for people to view but not interact.
- Select **None** to go back.

When you exit the report, your **View** settings aren't saved, but revert to the default setting. If it's important to you to save these settings, use bookmarks.

You may alternatively use your browser to change page display.

The zoom controls in your browser increase and decrease the available canvas area.



Bookmarks

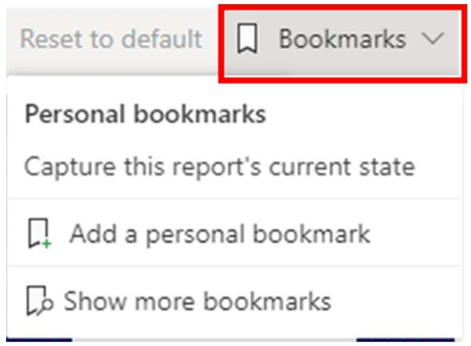
A bookmark captures the state of a report page. This includes the settings you've made to filters, slicers, and visuals on that page.

There are two types of bookmarks: *personal* and *report*.

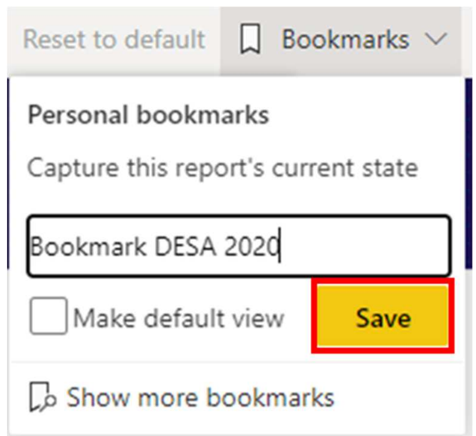
- **Report bookmarks** are added to reports by report *designers*. When the designers share their reports with colleagues, the bookmarks travel with the report. Everyone who can open and view that report may also see and use the report bookmarks.

Personal bookmarks may be created by anyone who can open a report. Personal bookmarks are for your use only. You may also create a collection of bookmarks, arrange them in the order you want, and subsequently step through each bookmark in a presentation to highlight a series of insights that tell a story. There is a limit of 20 bookmarks.

1. To create a personal bookmark for a specific view, apply the desired filters to the visuals.
2. Open the **Bookmarks** pane by selecting the  icon and choose **Add a personal bookmark**.



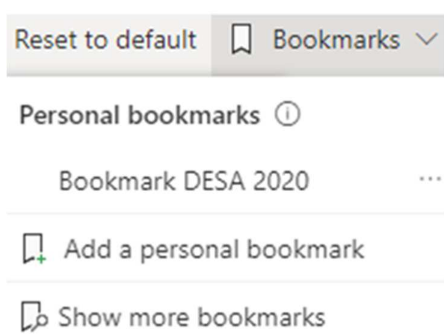
3. Type the name of the bookmark and click on **Save.**



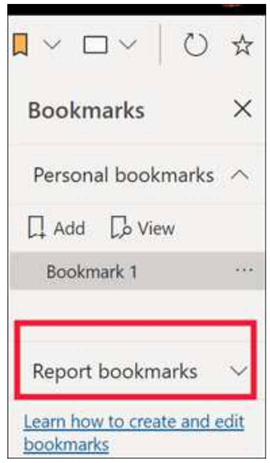
If you have reshare permissions, when you share the report, you may choose to include your changes.

- If you have a personal bookmark active and share your report, recipients will see the bookmarked version of that report page.
- Like the method above, with a personal bookmark active, you may share in Microsoft Teams. For more information, check Chat in Teams.
- With a personal bookmark active, you may use the comment feature. For more information, see here.

1. To open **report bookmarks**, go to Show more bookmarks.



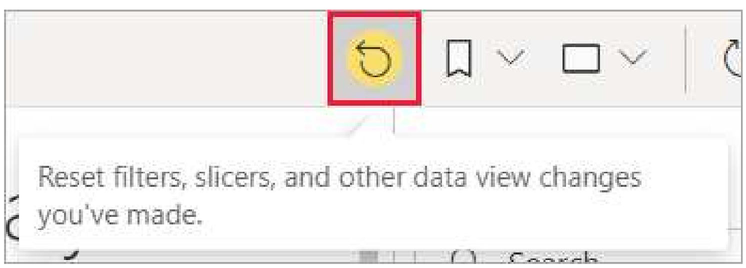
2. Then click on **Report Bookmarks** and select the desired view.



Above is a screenshot of a report canvas with the Bookmarks pane open.

Reset to default

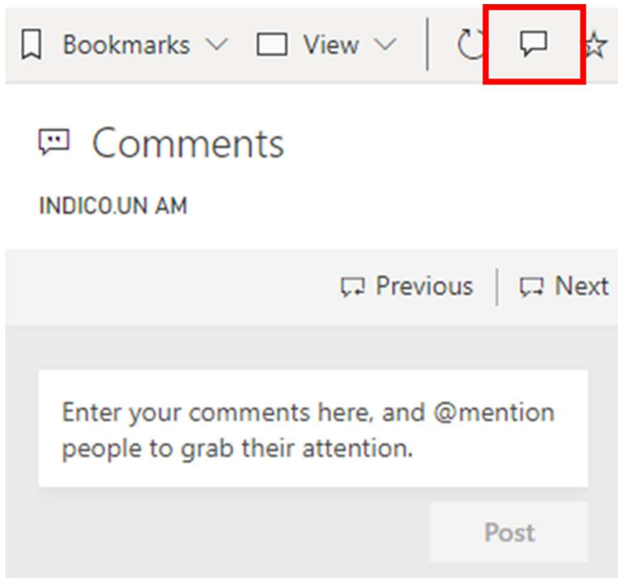
If you want to cancel changes you've made to the filters, views, etc., select the **Reset** icon from the top menu bar. This resets the filters to their original state as set by the report designer.



Add comments to a report

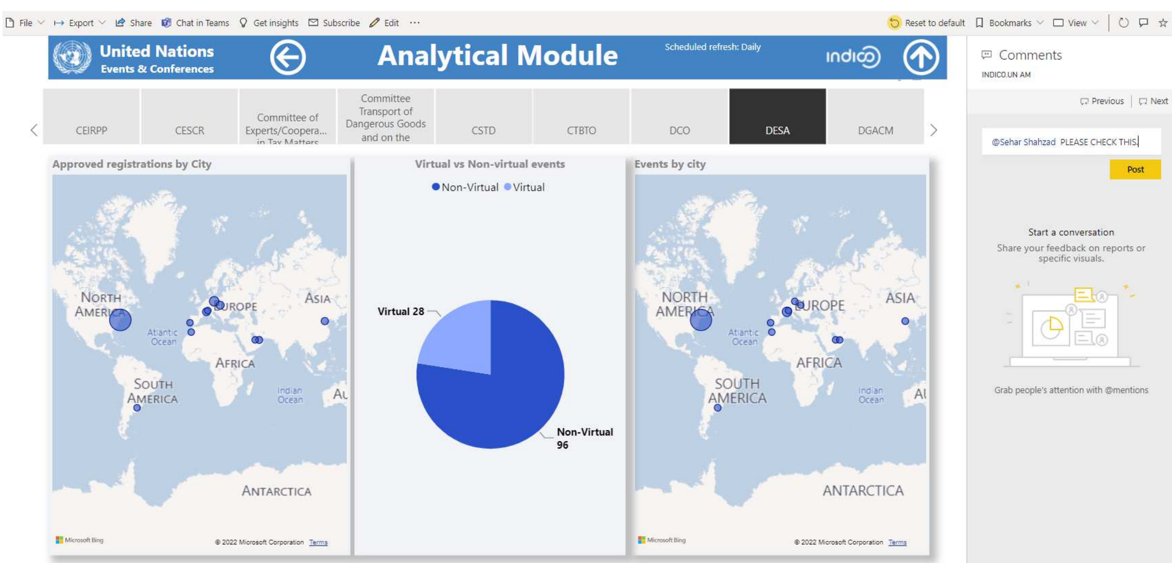
The **comment** feature is just one of the ways a *reporter* may collaborate with others.

Comments may be added to an entire report page and/or to individual visuals on a report page. You may add a general comment or add a comment targeted at specific colleagues.

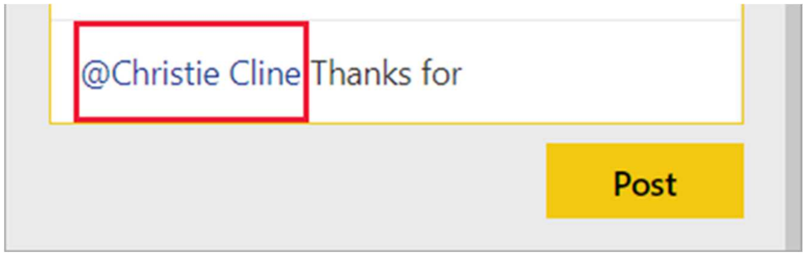


When you add a comment to a report, Power BI captures the current filter and slicer values and creates a bookmark. This means that when you select or respond to a comment, the report page or report visual may change to show you the filter and slicer selections that were active when the comment was first added. Comments may be visualized by users assigned a reporter role in the Indico.UN AM.

If you send a comment to a reporter with the @mention, as in the example below, the interested person will see the view bookmarked by PBI when you shared the comment.



To respond to a comment, select **Reply**, type your response, and select **Post**.



By default, Power BI directs your response to the colleague who began the comment thread, in this case Aaron.

If you want to add a comment that is not part of an existing thread, enter your comment in the upper text field.

Notes:

Comments are limited to **2000 characters**, including @mentions of other users and spaces.

The maximum number of conversations on a report is 100. The maximum number of comments per conversation is 1,000. To add a new conversation or comment, delete prior conversations or comments.

Bookmarks are not captured when you reply to a conversation. Only the first comment in a conversation creates a bookmark.

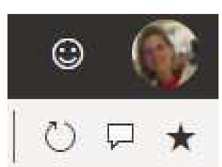
If you require further information about commenting on visuals, please go here.

Favorite reports

When you make content a *Favorite*, you may access it quickly from the **Favorites** content list. Favorites are typically content that you visit most often and are identified by a star icon.

To add a report as a Favorite,

1. Open the report that you use often.
2. From the upper menu bar of the Power BI service, select **Favorite** or the ☆ icon.



3. Access the favorite report from the main navigation pane in PBI **(only if you have a UN domain)**.

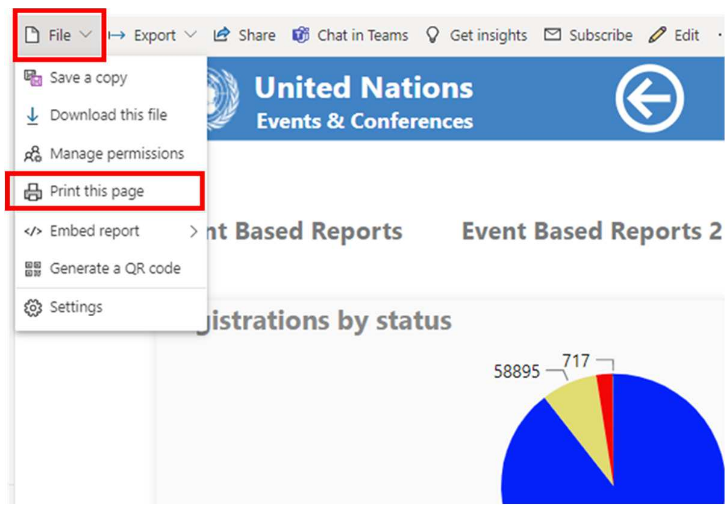
Printing a report

When you print a report, the content displays on the paper size set on the browser you are using.

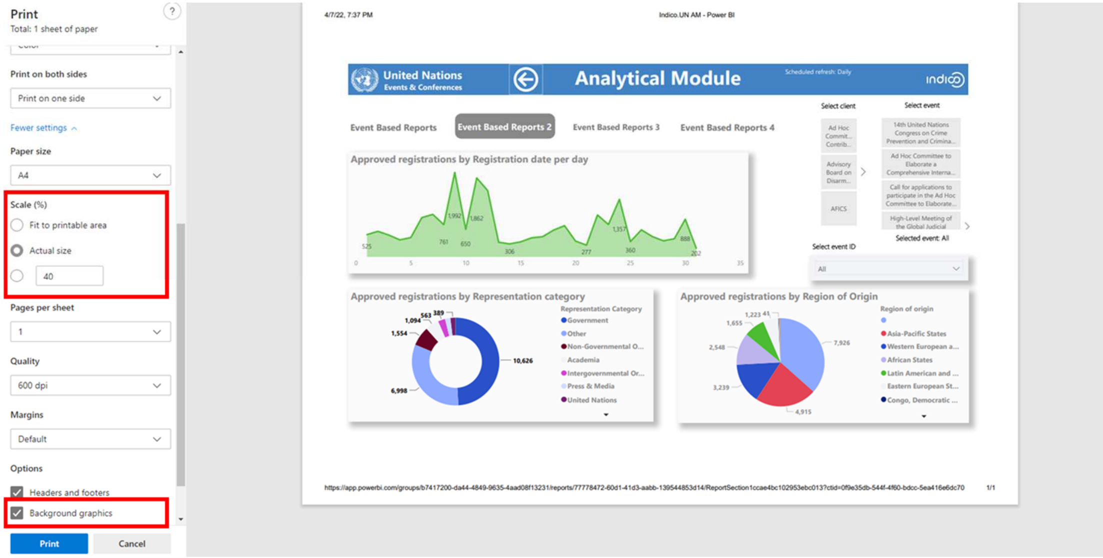
There are browser settings you may use to adjust the printout, but even then, you may not get the result you want. In this case, consider exporting to PDF first and printing the PDF instead.

Reports may be printed one page at a time.

1. Open the report and select **File** on the action bar. Then click **Print this page** to print the current report page.



2. The Print window for your browser opens.
3. If your dashboard, report, or visual is wider than it is tall, consider using the **Landscape** layout.
4. To fit more onto a printed page, adjust e.g., margins and **scale** and ensure that **background graphics** is enabled.



Experiment with your browser's settings until you achieve the look you like.

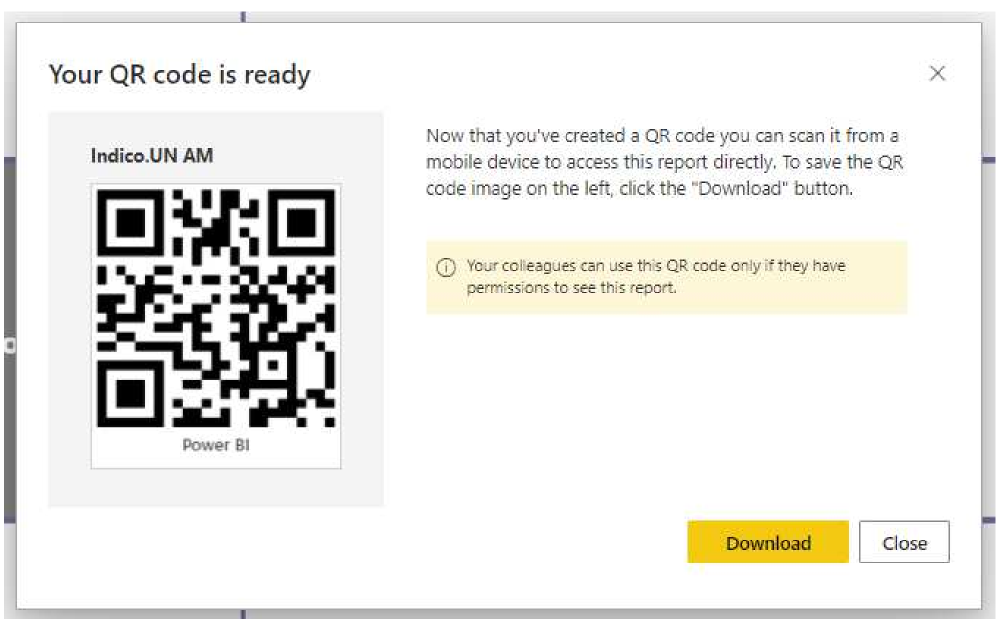
To have details about how to print a visual, go here.

Generate a QR code

When you scan a QR code that has been created for a Power BI report, that report will open directly - you won't have to navigate to it or search for it.

Note: Indico.UN AM reports are currently developed to be visualized on a desktop computer. A mobile friendly version is **not** available yet.

1. Open the report and select **File** on the action bar. Then **Generate a QR code** to visualize the current report page on your mobile phone.

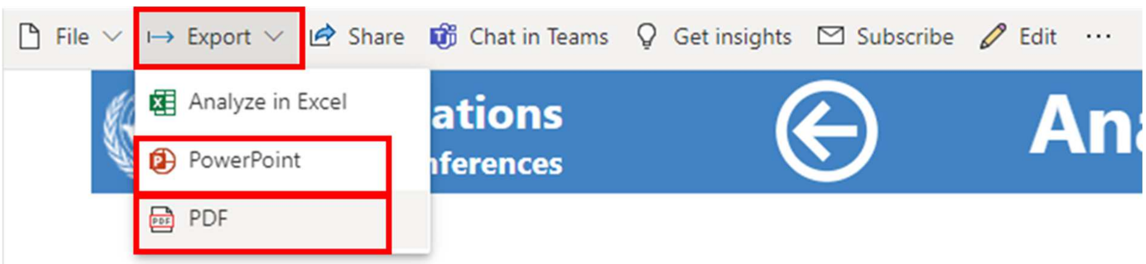


2. On the mobile phone, tap the camera icon.
3. When the camera opens, point it at the Power BI QR code.
4. The report will open directly.
5. You may download the QR code and share it with the colleagues who have been granted a reporter role.

Export to pdf and ppt

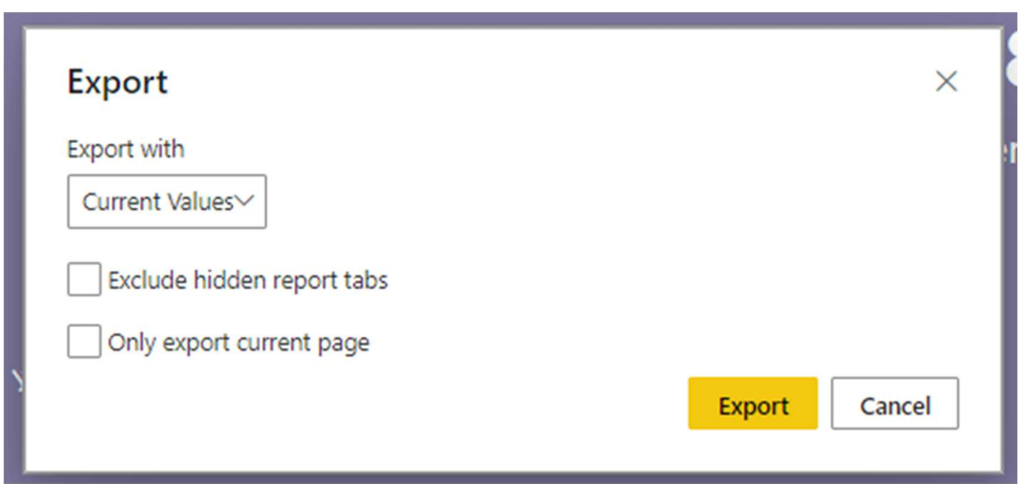
With Power BI, you may publish your report to PDF format and easily create a document based on your Power BI report. When you export to PDF, each page in the Power BI report becomes an individual page in your PDF document. Exporting to PDF is one way to share or print reports.

1. Open the report and select **File** on the action bar. Then click **Export** to view the pages in pdf or in power point.

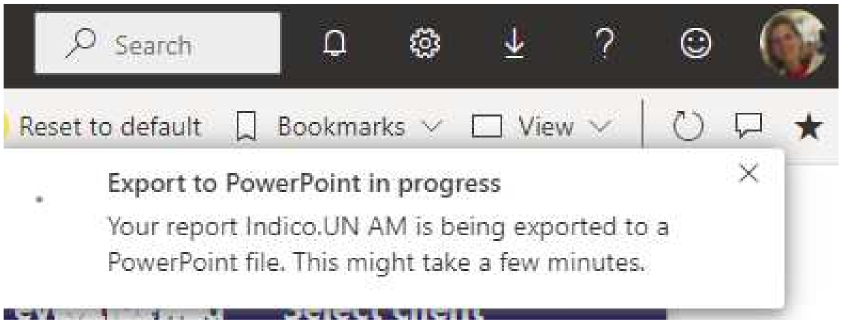


By default, PBI exports all the report pages. Deselect **Exclude hidden report tabs** if you wish to download the full report. On the other side, select **Only export current page** if you prefer to export only the current page by flagging the related box.

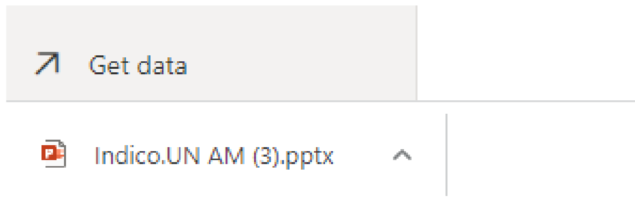
2. On the same interface, select **Current values** if you are interested in the view including the filters and slicers applied – or the **default values** from the drop-down list.



3. Click **Export**
4. You will see a notification in the upper-right corner of the browser.



5. After the export is completed, the notification banner shows the downloaded report at the bottom of the screen.



6. The exported PDF/PPT displays in your browser and is automatically saved to your **Downloads** folder.

If you want to export to PPT only one visual, go here.

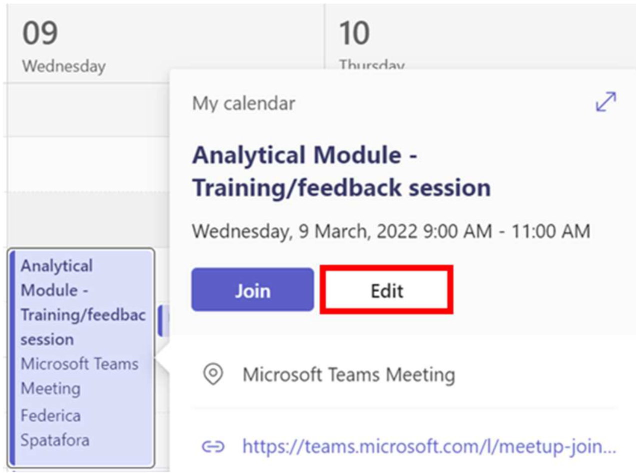
Chat in Teams

In meetings, keeping everyone on track towards shared objectives is important. Use data, trends, and metrics to show the impact of the work you and your team are undertaking.

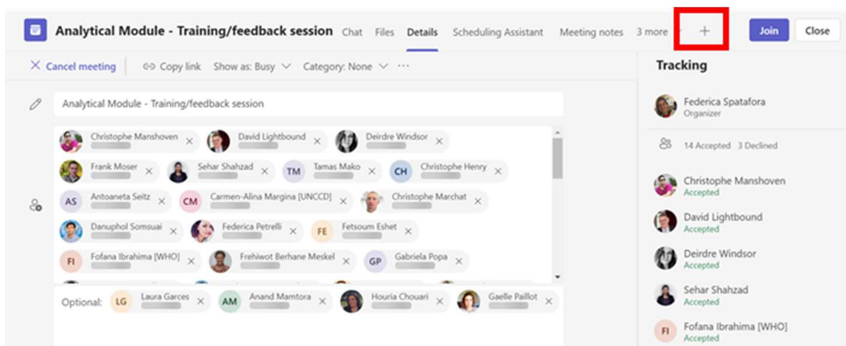
Before the meeting

Add a Power BI report to a meeting.

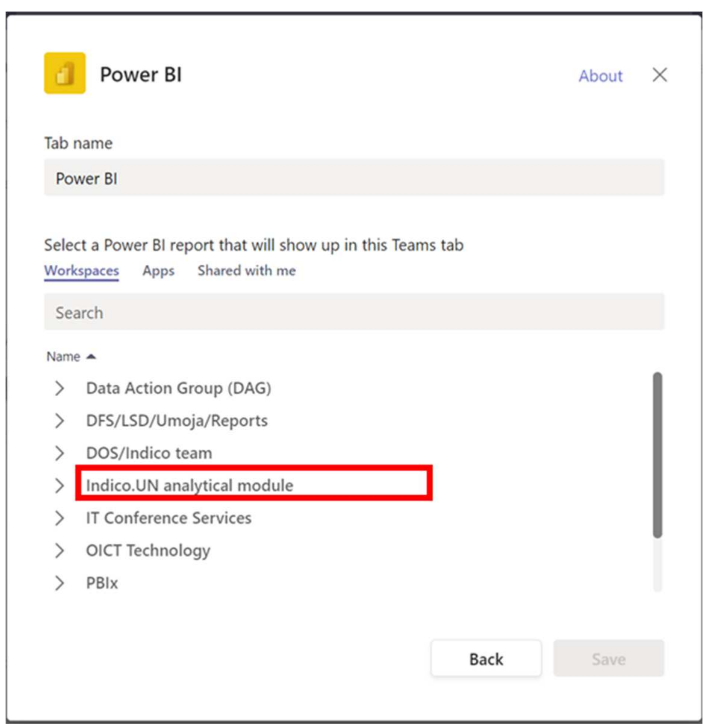
1. Create the meeting and invite others.
2. Send the meeting invite.
3. Select **Edit** to open the meeting in the calendar. You only see the option to edit if you're the meeting organizer.



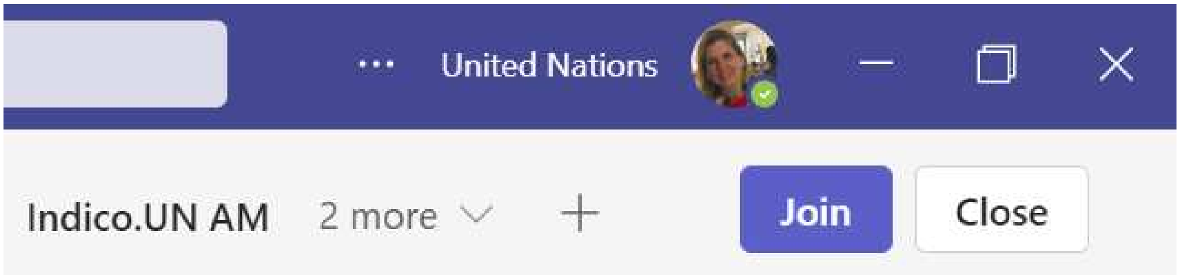
4. Select the **+ Add a tab** button to add the Power BI tab to the meeting.



5. Navigate to PBI and the Indico.UN analytical module report and select it.



6. Select **Save**.



During the meeting

When you're in a meeting, data may help guide the discussion or answer questions raised by attendees. It's easy to present data in Power BI during a meeting, share links to data with meeting attendees, and find data that may answer questions.

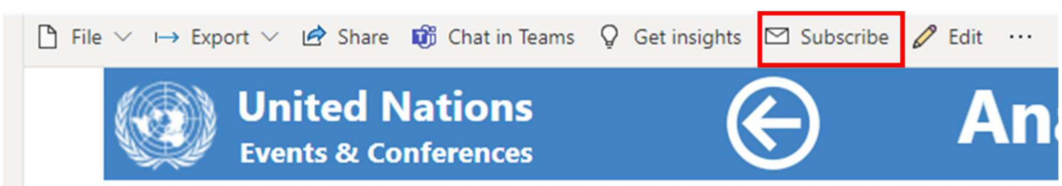
1. After joining the meeting, navigate to the Teams window.
2. Open the meeting in the calendar.
3. Anyone in the meeting may select the Power BI tab to view the report you added to the meeting.

Get insights

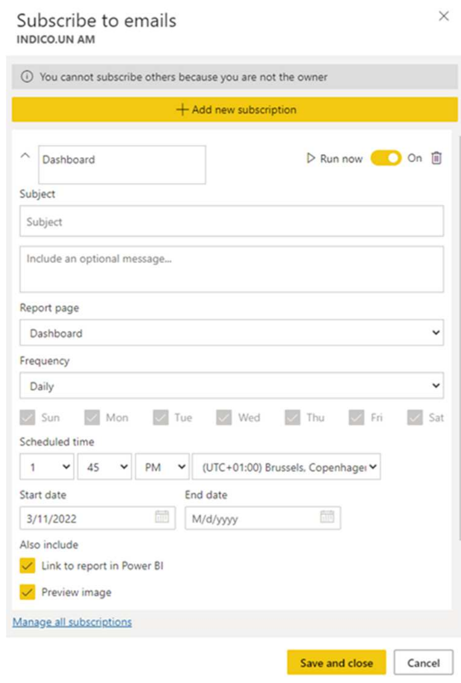
Insights is currently not available in Apps and Embedded for reports in Premium workspaces. Users with PPU license may still use Insights. The Power BI team is currently working on a fix.

Subscribe

1. Open the dashboard or report, and from the top menu bar, select **Subscribe** .



2. Select **Add new subscription** and give your subscription a name. By default, your subscription will be given the same name as your report page or dashboard.



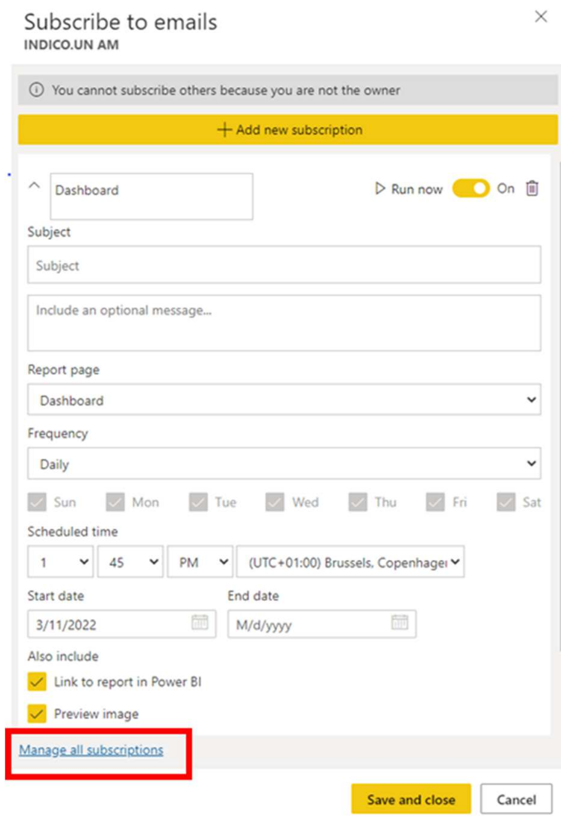
3. Use the yellow slider to turn the subscription on and off. Setting the slider to **Off** doesn't delete the subscription. To delete the subscription, select the trashcan icon.
4. Edit or add recipients by email address, ensuring that you have at least one. Optionally, add a subject and email message details.
5. For Power BI reports, select the **Report page** you want to appear in the preview image. To subscribe to more than one page in a report, either select **Add new subscription** and choose a different page from the dropdown or select the **Full report attachment as** checkbox under **Also include**.
6. Select a **Frequency** for your subscription. You may choose Daily, Weekly, or After data refresh (Daily).
7. Select a **Start date** and optionally, an **End date** for your subscription. You may change it to any date in the future at any time before the subscription ends.
8. Include additional information in the email. Select one or more of these checkboxes.
   - **Link to report/dashboard in Power BI**: Include a “Go to report” button in the body of the email that links to the report or dashboard in the Power BI service.
   - **Preview image (for Power BI reports only)**: Include a preview of the report page in the body of the email.
9. If everything looks good, select **Save and close**. To test out your subscription, select **Run** now. This sends the email to you right away.
10. You will now receive an email and snapshot of the report or dashboard on the schedule you set.

Note

To avoid subscription emails going to your spam folder, add the Power BI email alias (no-reply-powerbi@microsoft.com) to your contacts. If you're using Microsoft Outlook, right-click the alias and select **Add to Outlook contacts**.

Manage subscriptions

Only you may manage the subscriptions you create. Open the report and select **Subscribe** from the top menu again. In the lower-left corner of the subscriptions pane, select **Manage all subscriptions**.



All the subscriptions for the current workspace are displayed.

To see all your subscriptions across all workspaces, navigate to **My workspace** and the select the gear icon, **Settings** and then the **Subscriptions** tab.

Subscribe others

To subscribe others to a report or dashboard, you'll need a Power BI Pro or Premium Per User (PPU) license.