

ANALYTICAL MODULE –
HELP FILE 3

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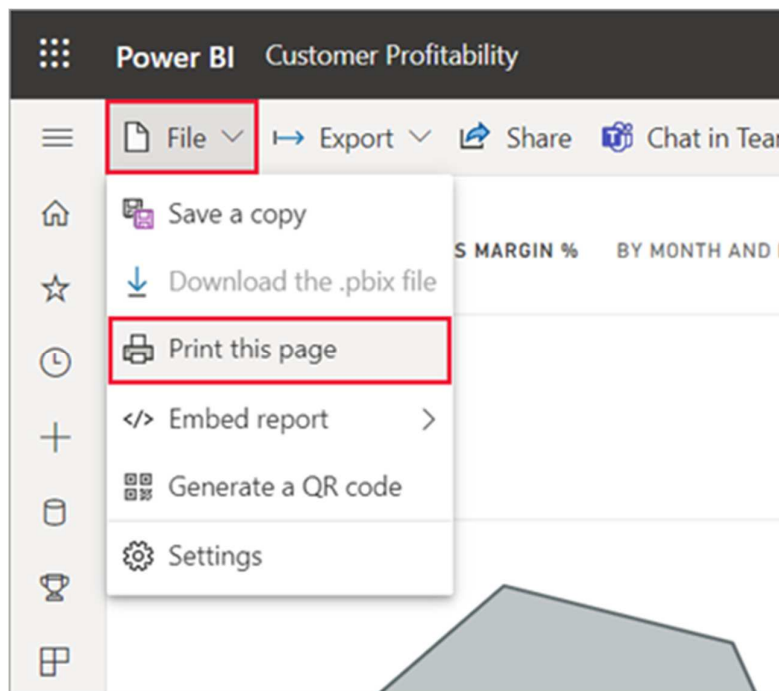
HELP FILE 3 - Visualizations

Visualizations (also known as visuals) display insights that Power BI discovers on the data. Visualizations make it easier to interpret the insight because your brain comprehends a picture quicker than it can comprehend a spreadsheet of numbers.

Just some of the visualizations you'll come across in Power BI are: waterfall, ribbon, treemap, pie, funnel, card, scatter, and gauge.

Print a report visual

1. Open the visual in Focus mode by hovering over the tile and selecting the Focus icon  from the top-right corner.
2. From the upper-left corner, select **File** > **Print this page** to print the visual.



3. Follow the printing steps from **Print a dashboard**, above.

Copy visual as image

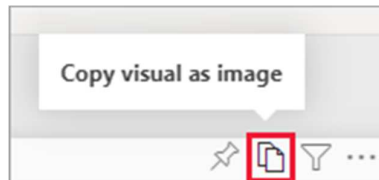
You may copy a visual and paste it into any other application that supports pasting. Copy an important visual and paste it into an email message, Word, PowerPoint, another Power BI report, and many more applications.

When you copy a static image of a visual, you get a copy of the visual along with the metadata. This includes:

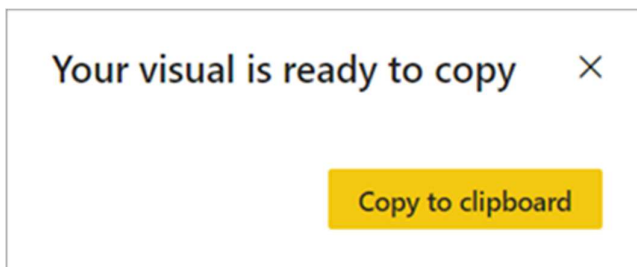
- link back to the Power BI report or dashboard

- title of the report or dashboard
- notice if the image contains confidential information
- last updated time stamp
- filters applied to the visual

1. To copy from a report visual, navigate to the report you want to copy from. From the upper-right corner of the visual, select the icon for **Copy visual as image**.

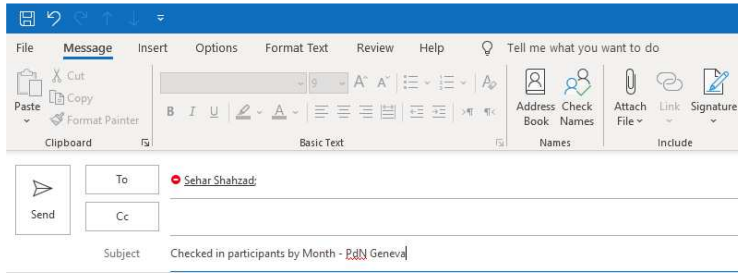


2. When the **Your visual is ready to copy** dialog appears, select **Copy to clipboard**.

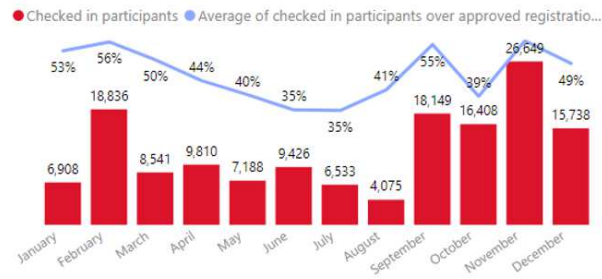


3. After your visual is copied, paste it into another application using **Ctrl + V** or **right-click > Paste**. In the screenshot below, we've pasted the visual into an email.

If there is a data sensitivity label applied to the report, you'll receive a warning when you select the copy icon.



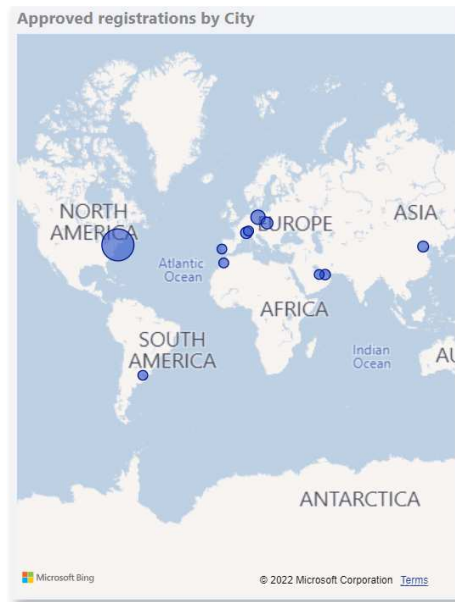
Checked in participants by Month



[Open in Power BI](#)

Indico UN AM
 Data as of 4/8/22, 7:38 AM
 Filtered by **venue** (is Palais des Nations), **duty station** (is Geneva)

Certain visuals may not be copied including:

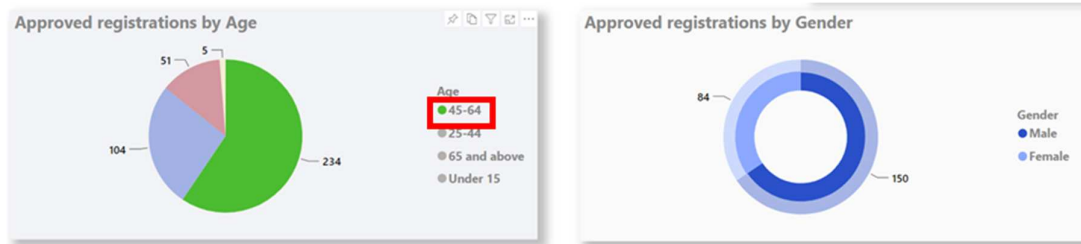


- ESRI and other map visuals
- Python visuals
- R visuals
- PowerApps visuals

How visuals cross-filter each other in a Power BI report

By default, selecting a data point in one visual on a report page will cross-filter or cross-highlight other visuals on the page. Exactly how the visuals on a page interact is set by the report *designer*.

Cross-filtering and cross-highlighting may be useful to identify how one value in your data contributes to another. The terms *cross-filter* and *cross-highlight* are used to distinguish the behavior described here from what happens when you use the **Filters** pane to filter and highlight visuals.

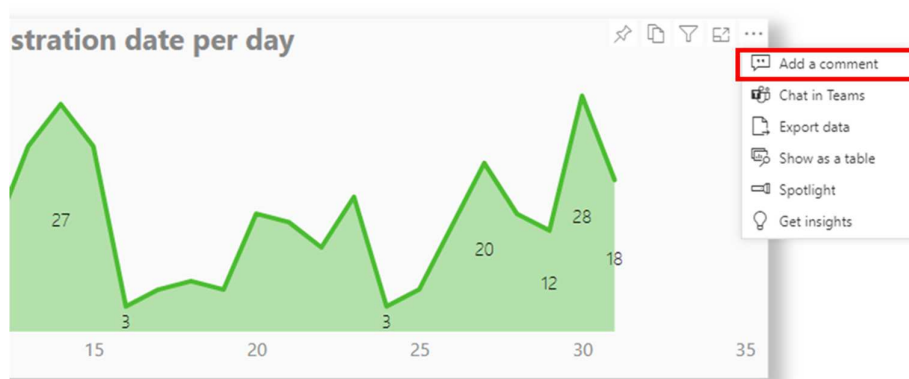


If you want to know the gender of the 234 approved participants between 45 and 64, click on the pie slice in green and the visual on *Approved registrations by Gender* on the same page will automatically highlight the figures to reflect only the gender composition of the 234 participants between 45 and 64 (84 female and 150 male).

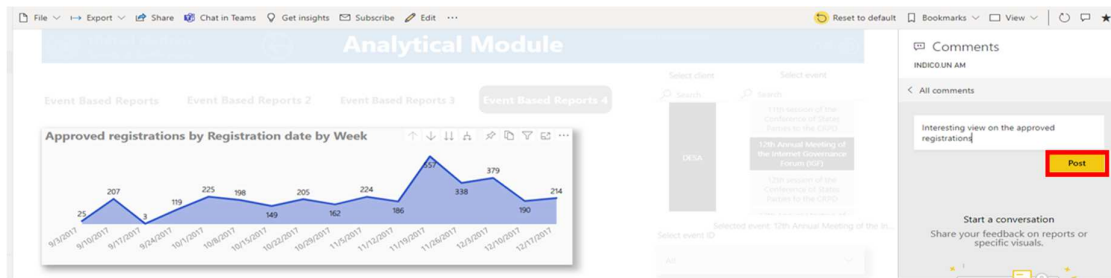
Comments to Visuals

In addition to adding comments to an entire report page, you may add comments to individual report visuals.

1. Hover over the visual and select **More options (...)**.
2. From the dropdown, select **Add a comment**. The comments dialog opens and the visual is spotlighted.



4. Type your comment and select **Post**.

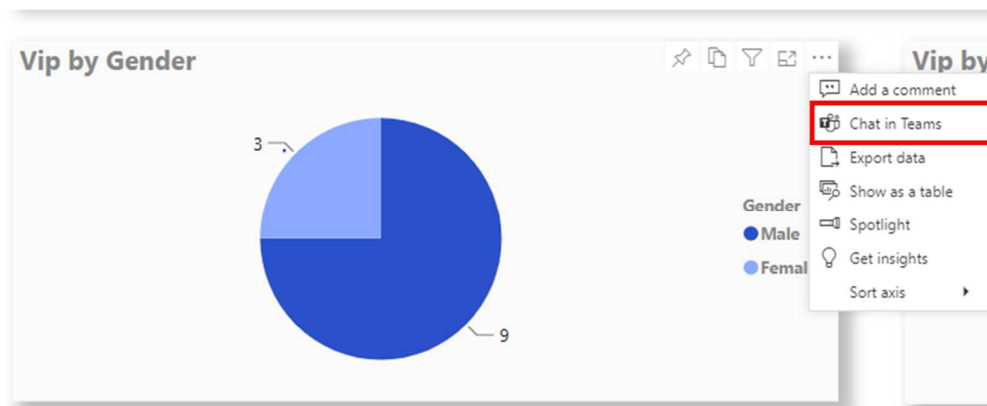


5. Select **Close** to return to the dashboard or report.

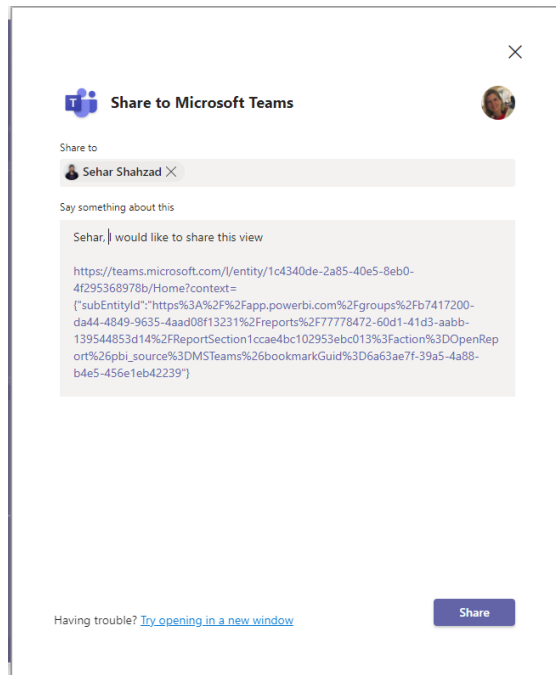
If you would like more information about adding a comment to a report, check [here](#).

Chat in teams on a visual

1. Open the report in the Power BI app in Teams or in the Power BI service.
2. Select the report or a specific visual.
3. Select the **Chat in Teams** button.



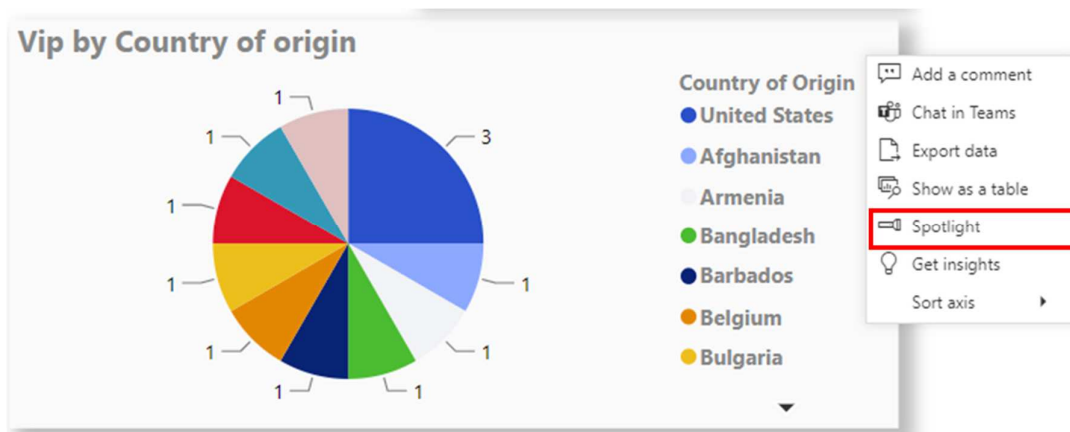
4. Select the meeting name/person to send to.
5. Type your message above the link that's provided.
6. Press **Share**.



Your message appears as part of the meeting chat. Attendees may open it to see the data you wanted with the filters and slicers applied.

Spotlight

1. Open a report in the Power BI.
2. Decide which visual you'd like to highlight on the report page. Select the **More actions (...)** dropdown.



3. Choose the option for **Spotlight**. The selected visual is highlighted which causes all other visuals on the page to fade to near transparency.

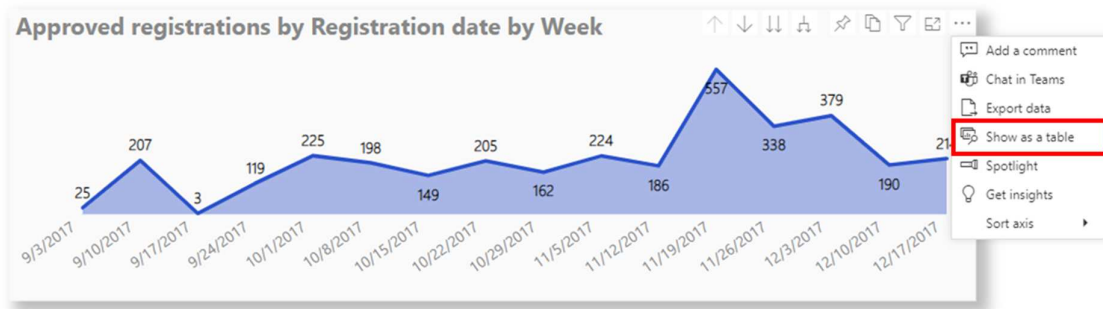
Show as a table

A Power BI visual is constructed using data from underlying datasets. When you select **Show as a table**, Power BI displays the data below (or next to) the visual.

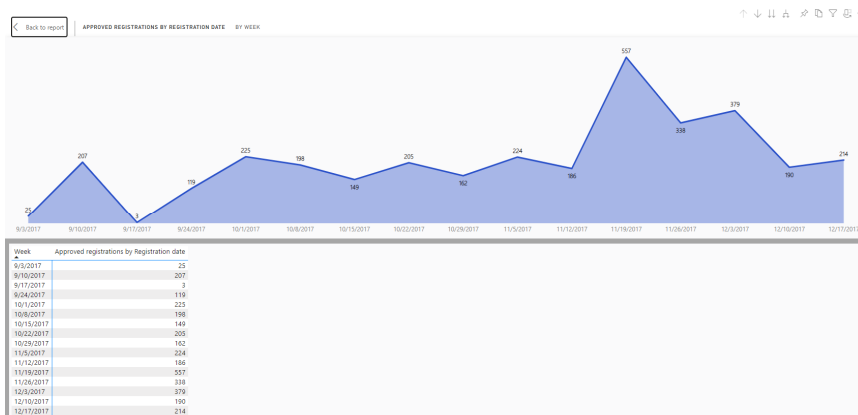
You may also export the data to Excel for visuals in a report.


Show data being used to create a report visual

1. In the Power BI service, open a report and select a visual.
2. To display the data behind the visual, select **More options (...)** and choose **Show as a table**.



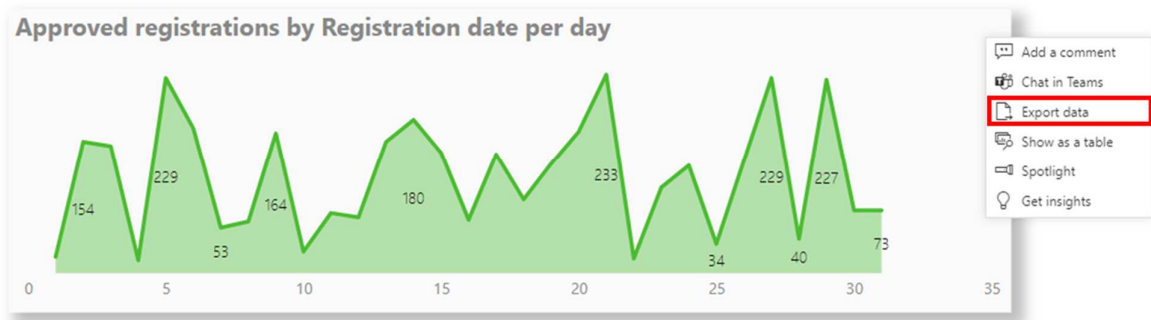
3. By default, the data displays below the visual.



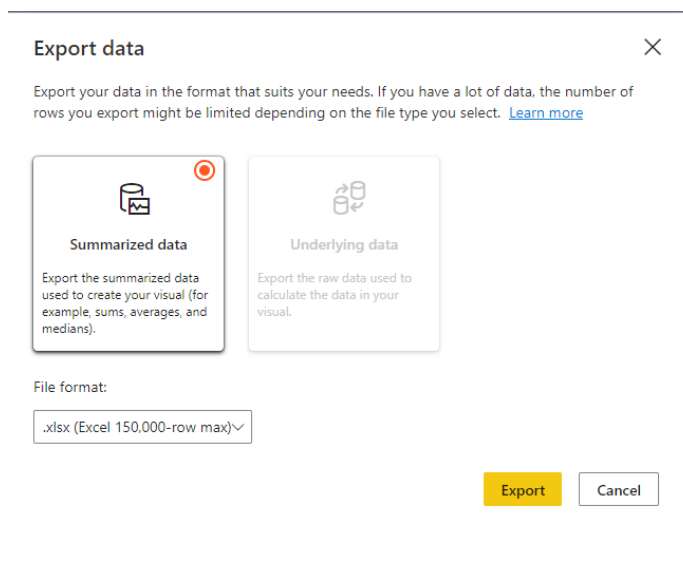
4. To change the orientation, select vertical layout  from the top-right corner of the visualization.
5. To return to the report, select **Back to report** from the upper-left corner.

Export data

1. Select **More options (...)** in the upper-right corner of the visual and choose **Export data**.



Power BI gives you the option to export the summarized data.



Export summarized data

Select the option **Summarized data** if you want to export data related to what you see in the visual. This type of export displays only the data (columns and measures) being used to create the visual.

Note: If the visual has filters applied, then the data exported will also be filtered.

When you select **Export**, your browser prompts you to save the file. Once saved, open the file in Excel. Your exported file is saved in your local Downloads folder or to a folder you specify.

Sort Axis

You may change how visuals look by sorting it by different data fields. By changing how you sort a visual, you may highlight the information you want to convey. Whether you're using numeric data or text data, you may sort your visuals as desired.

After you've changed the sorting of a visual, you may save a personalized version of that visual. With the **Personalize this visual** feature, make the changes yourself and when you

have the visual the way you want it, save it as a [bookmark](#) to come back to. You don't even need an edit permission for the report.

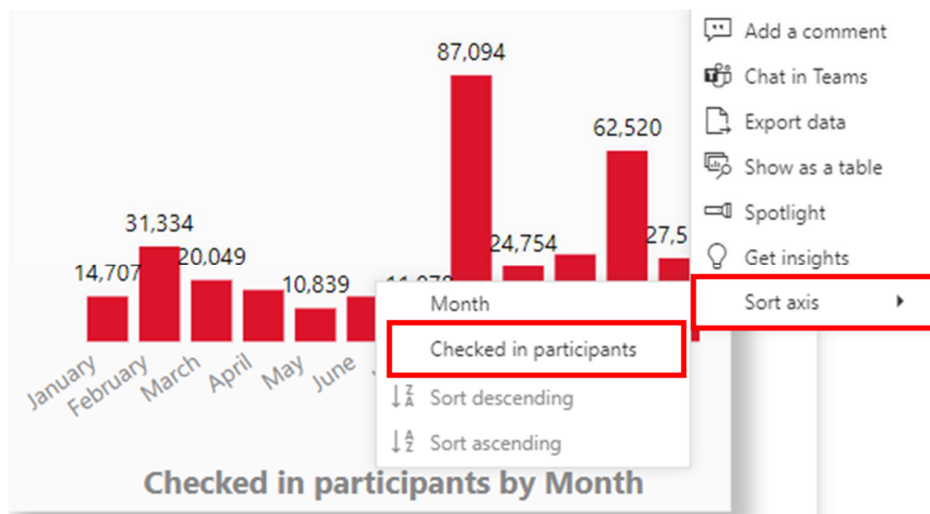
Visuals on a dashboard may not be sorted. But in a Power BI report, you may sort most visuals by one, and sometimes two, fields at a time. For certain types of visuals, sorting is not available at all: tree maps, gauges, maps, etc.

This video demonstrates how to change sort order and some of the newer sorting features now available in the Power BI service.

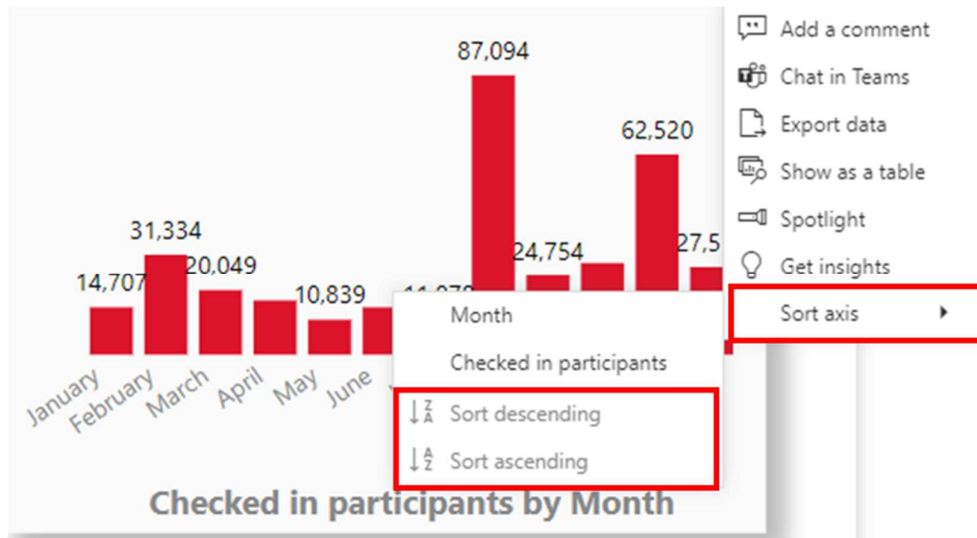
1. Select a visual (that may be sorted) and choose **More actions (...)**. There are three options for sorting: **Sort descending**, **Sort ascending**, and **Sort by**.
2. Sort alphabetically or numerically

Visuals may be sorted alphabetically by the names of the categories in the visual, or by the numeric values of each category. For example, this chart is sorted alphabetically by the X-axis category **Month**.

Select a numerical value used in the visual. In this example, we've selected **Checked-in Participants**.



If necessary, change the sort order between ascending and descending. Select **More actions (...)** again and choose **Sort descending** or **Sort ascending**.



Note


Not all visuals may be sorted. For example, the following visuals may not be sorted: tree map, map, filled map, scatter, gauge, card, waterfall.

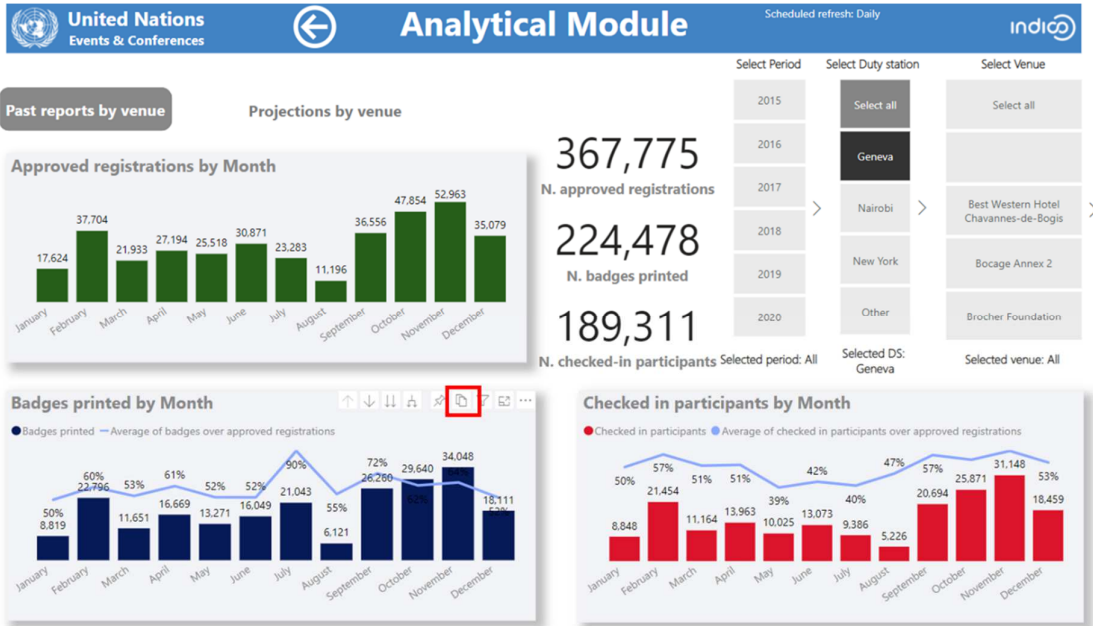
Focus mode

If you want to display your Power BI visuals without the distraction of menus and navigation panes, to get a full view of your content at a glance, use the focus mode.

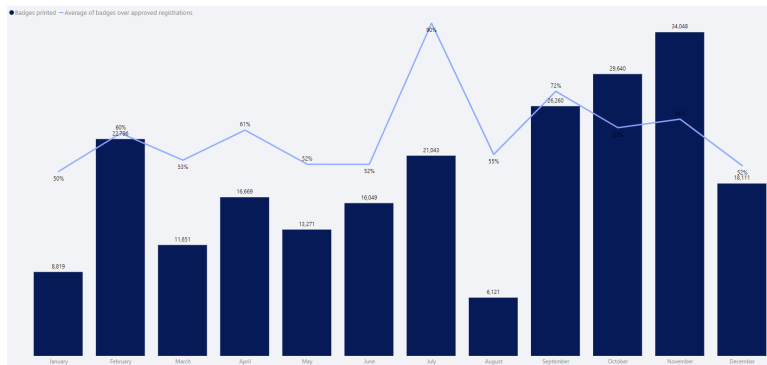
Focus mode lets you expand a visual to see more detail. Maybe you have a report that is a little crowded and you want to zoom in on only one visual.

Working in focus mode

1. To open a report visual in focus mode, hover over the visual and select the **focus mode** icon .



The visual opens and fills the entire canvas.



To leave focus mode and return to the dashboard or report select **Back to report** (in the upper-left corner of the visual).



Drill down and up

This article shows how to drill down in a visual in the Microsoft Power BI service. Using drill down and drill up on your data points, you may explore in-depth details about your data.

When a visual has a hierarchy, you may drill down to reveal additional details. For example, you may have a visual that looks at Representation category by a hierarchy made up of representation type, entities/countries, etc. By default, the visual would show the count of the approved participants by representation category. But, because it has a hierarchy, selecting one of the visual elements would display an increasingly more-detailed picture. Selecting the **Government** element would show you countries represented. Selecting the **IGOs** element would show you details for entities represented, etc.

Figure out which visuals may be drilled


Hover over a visual. If you see a combination of these drill controls at the top, your visual has a hierarchy.

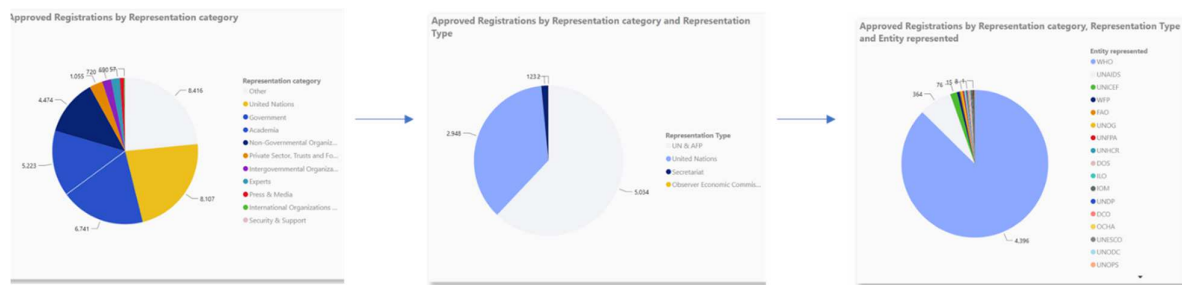



Learn how to drill down and up

Drill down all fields at once



You have several ways to drill into your visual. Selecting the double arrow  drill-down icon takes you to the next level in the hierarchy. If you're looking at the **Representation category** level for one event, you may drill down to **representation type** level for all the representation categories present at the event, then **entities** level. Each step in the path shows you new information.

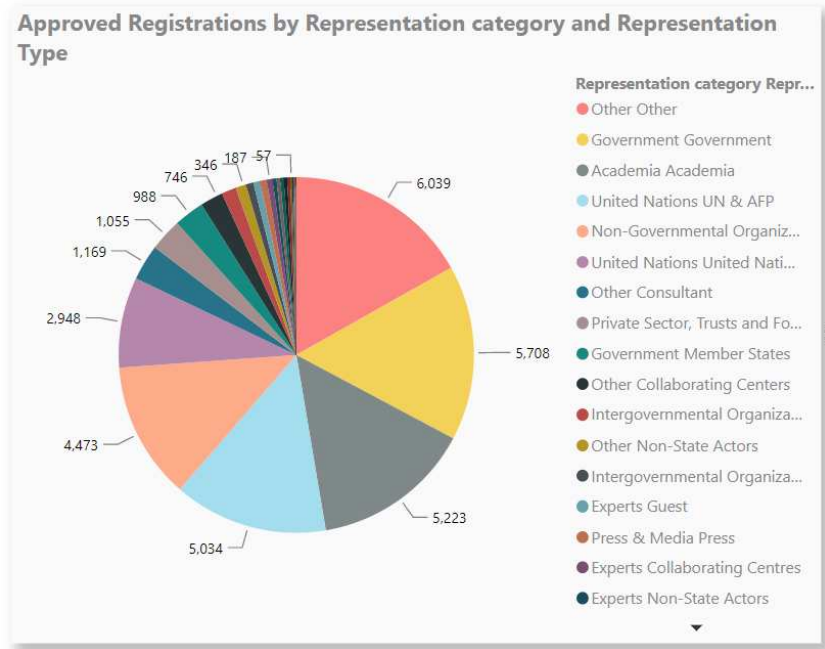


Select the drill-up icon  until you return to "Total registrations by representation category".


Expand all fields at once



Expand adds an additional hierarchy level to the current view. So, if you're looking at the **Representation category** level, you may expand all current levels in the tree at the same time to reach the level of **entity**. Each step in the path shows you the same information and adds on one level of new information.

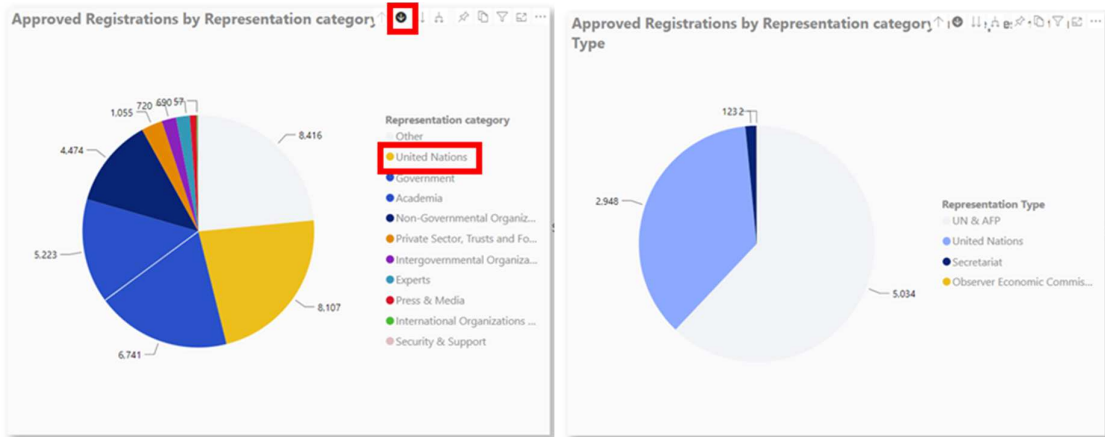


Drill down one field at a time

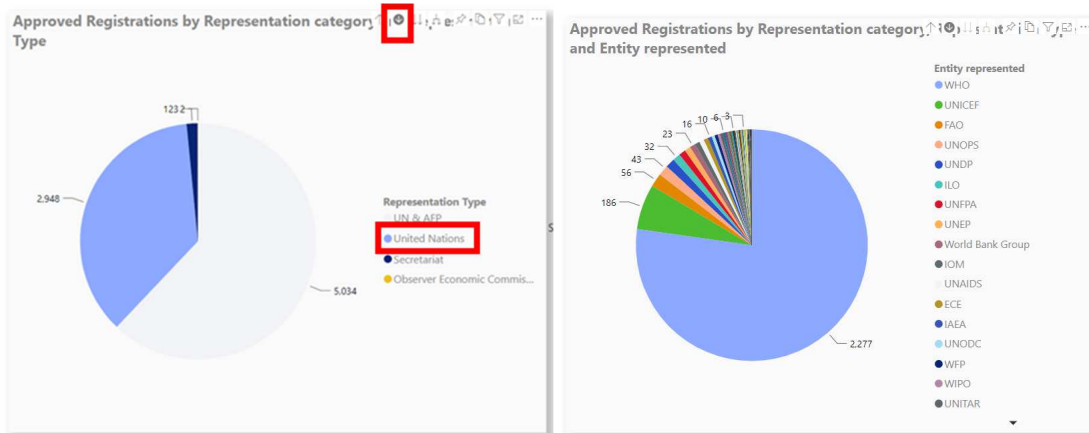
1. Select the drill-down icon to enable it . Now you have the option of drilling down **one field at a time** by selecting a visual element. Examples of visual elements are Government, Academia, United Nations, Other, etc.

If you don't enable the drill-down option, selecting a visual element (Government, United Nations, etc.) won't drill down. Instead, it will cross-filter the other charts on the report page.

Select the slice for **United Nations**. Your pie chart now shows all United Nations representation types.



Let's continue to drill down one field at a time. Select **UN & AFR**. Your pie chart now shows the entities under UN & AFR.



Display the data as you drill

Use **Show as a table** to get a look behind the scenes. Each time you drill or expand, **Show as a table** displays the data being used to build the visual. This may help you understand how hierarchies, drill, and expand work together to build visuals.

In the upper-right corner, select **More actions (...)**, and then select **Show as a table**.

