How to Get Insights From Power BI

November 21, 2024

forvis mazars

U.S. Presence

Top 10
U.S. Public Accounting Firm*

$2bn+
Revenue (2023)

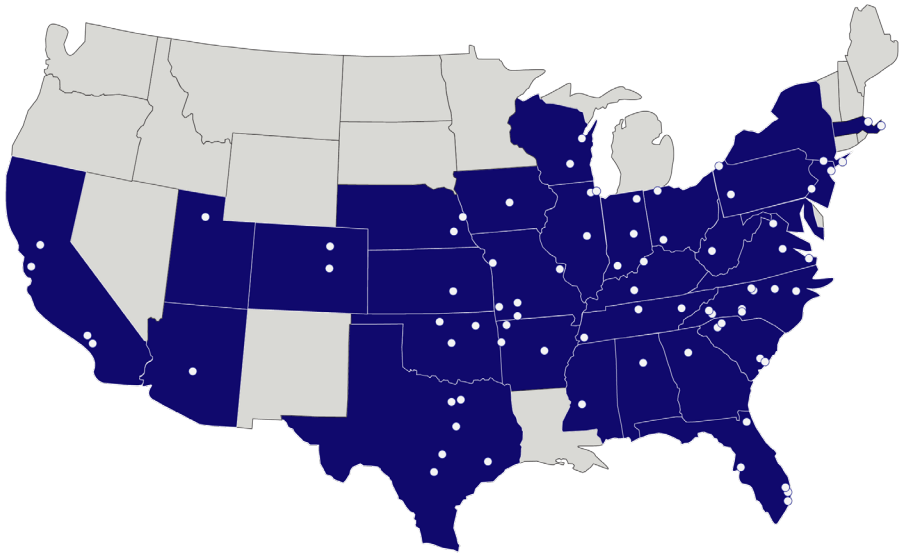
76
Markets

29
States

600+
Partners & Principals

7,000+
Employees

*Source: Inside Public Accounting, based on most recent rankings
2023 combined revenues: FORVIS $1.7bn, Mazars USA (expected) $305m



As of August 2024

○ Forvis Mazars markets

Alabama
Birmingham

Arizona
Phoenix

Arkansas
Fort Smith
Little Rock
Rogers

California
Irvine
Los Angeles
Sacramento
San Jose

Colorado
Colorado Springs
Denver

Florida
Boca Raton
Jacksonville
Miami
Tampa Bay
West Palm Beach

Georgia
Atlanta

Illinois
Chicago Downtown
Chicago Oakbrook Terrace
Decatur

Indiana
Evansville
Fort Wayne
Indianapolis

Iowa
Des Moines

Kansas
Wichita

Kentucky
Bowling Green
Louisville

Massachusetts
Boston Brewster
Boston State Street

Mississippi
Jackson

Missouri
Branson
Joplin
Kansas City
Springfield
St. Louis

Nebraska
Lincoln
Omaha

New Jersey
Iselin

New York
Long Island
New York City

North Carolina
Asheville
Charlotte SouthPark
Charlotte Uptown
Greensboro

North Carolina (cont)
Greenville
Hendersonville
Raleigh
Winston-Salem

Ohio
Cincinnati
Toledo

Oklahoma
Enid
Oklahoma City
Tulsa

Pennsylvania
Erie
Fort Washington
Pittsburgh

South Carolina
Charleston
Greenville
Spartanburg
Summerville

Tennessee
Knoxville
Memphis
Nashville

Texas
Austin
Dallas
Fort Worth
Houston
San Antonio
Waco

Utah
Salt Lake City

Virginia
Norfolk
Richmond
Tysons, VA

West Virginia
Charleston

Wisconsin
Appleton, WI
Madison, WI

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Business Technology Services

Forvis Mazars provides enterprise resource planning (ERP) & customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, & support services.

Our end-to-end solutions help clients achieve their digital transformation goals by:

- Creating effective processes & strategies for future operations
- Designing & implementing modern operational systems
- Reviewing new business-facing technologies
- Leveraging existing investments in legacy technologies
- Integrating data solutions

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Business Technology Services

ERP

- Microsoft Dynamics 365
  - Finance
  - Supply Chain
  - Commerce
  - Project Operations
  - Business Central
  - Dynamics GP
- NetSuite
- Sage & Sage Intacct
- Trimble Viewpoint Spectrum & Vista

CRM

- Microsoft Dynamics 365
  - Sales
  - Customer Service
  - Customer Insights
  - Field Service
- Salesforce
- Marketing Automation

Advanced Technology

- Insights
  - Microsoft Power BI
  - Solver Planning & Analysis
- Automation
  - Microsoft Power Platform
  - Robotic Process Automation (RPA)
- App Development

Managed Services for business applications, IT, & cybersecurity support.

Microsoft Partner

ORACLE NETSUITE Solution Provider

Sage Partner

salesforce PARTNER

solver

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Today’s Presenter

Business Technology Services Practice

“Our team is focused on delivering an Unmatched Client Experience® on every engagement.”

– Chad Back, Partner

Charles Allen

Senior Manager

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Objectives

1. Discuss how the Insights feature in Power BI can help uncover trends
2. Describe how using artificial intelligence & ad hoc reporting capabilities within Power BI can enhance data analysis & reporting
3. Define how to configure notifications to stay updated on report results & changes

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Agenda

1. Insights
2. Ad Hoc
3. Alerts & Notifications

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01

Insights

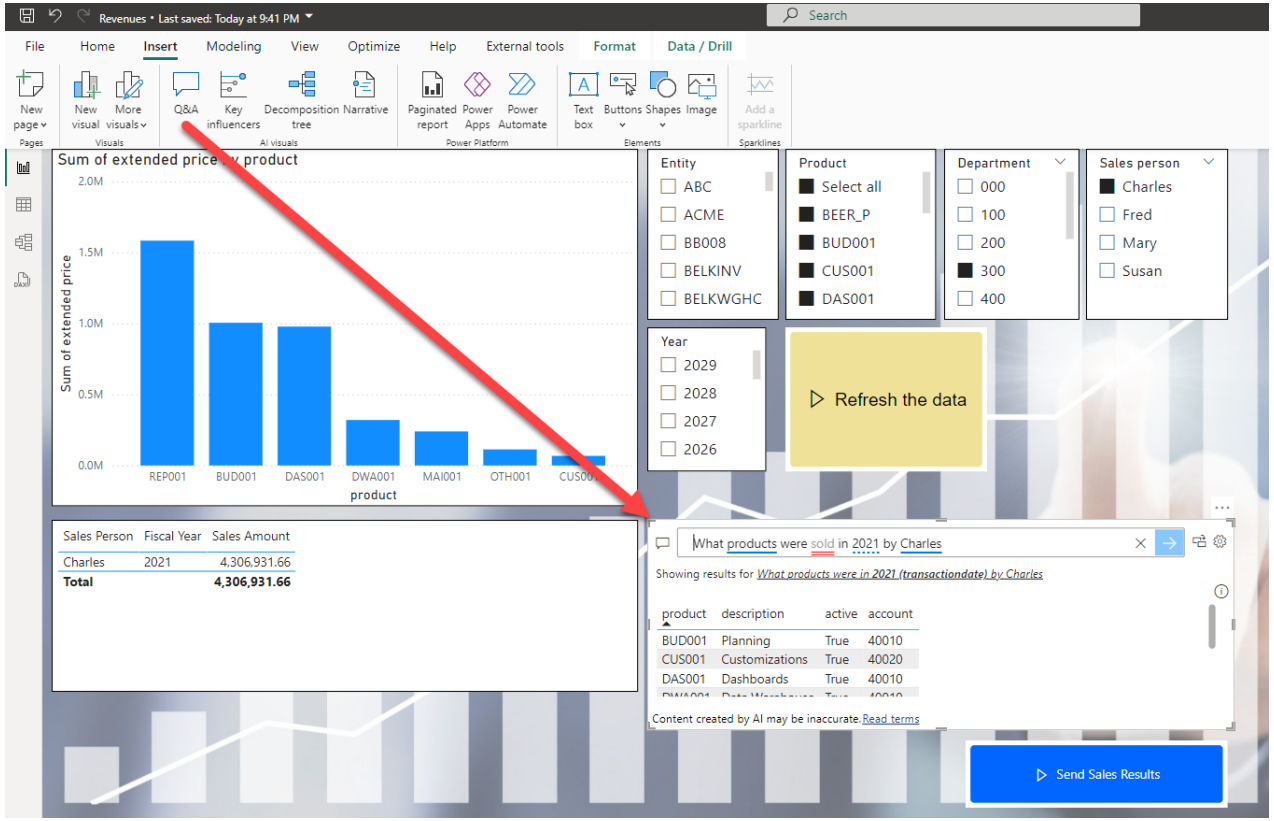
“We are surrounded by data,
but starved for insights.”

– Jay Baer

Insights
Q&A

- Uses natural language
- Answers can be turned into visuals
- Dashboards & reports
- Pro or Premium

https://learn.microsoft.com/en-us/power-bi/natural-language/q-and-a-intro



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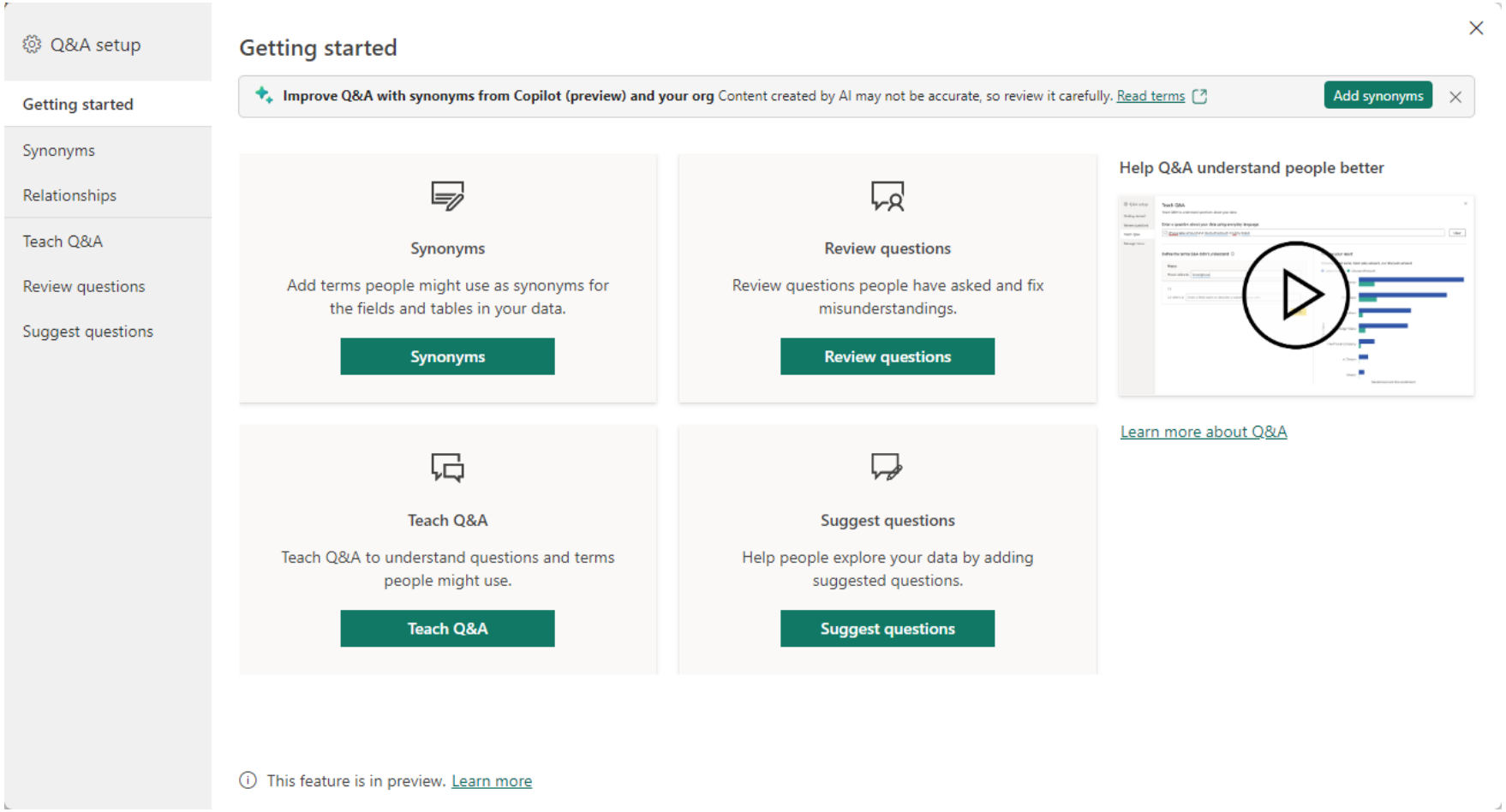
Insights
Q&A in Power BI Service



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Insights
Get Insights

- Searches the visualizations & provides information about them
- Only works with certain types of visualizations
- Requires Power BI Premium

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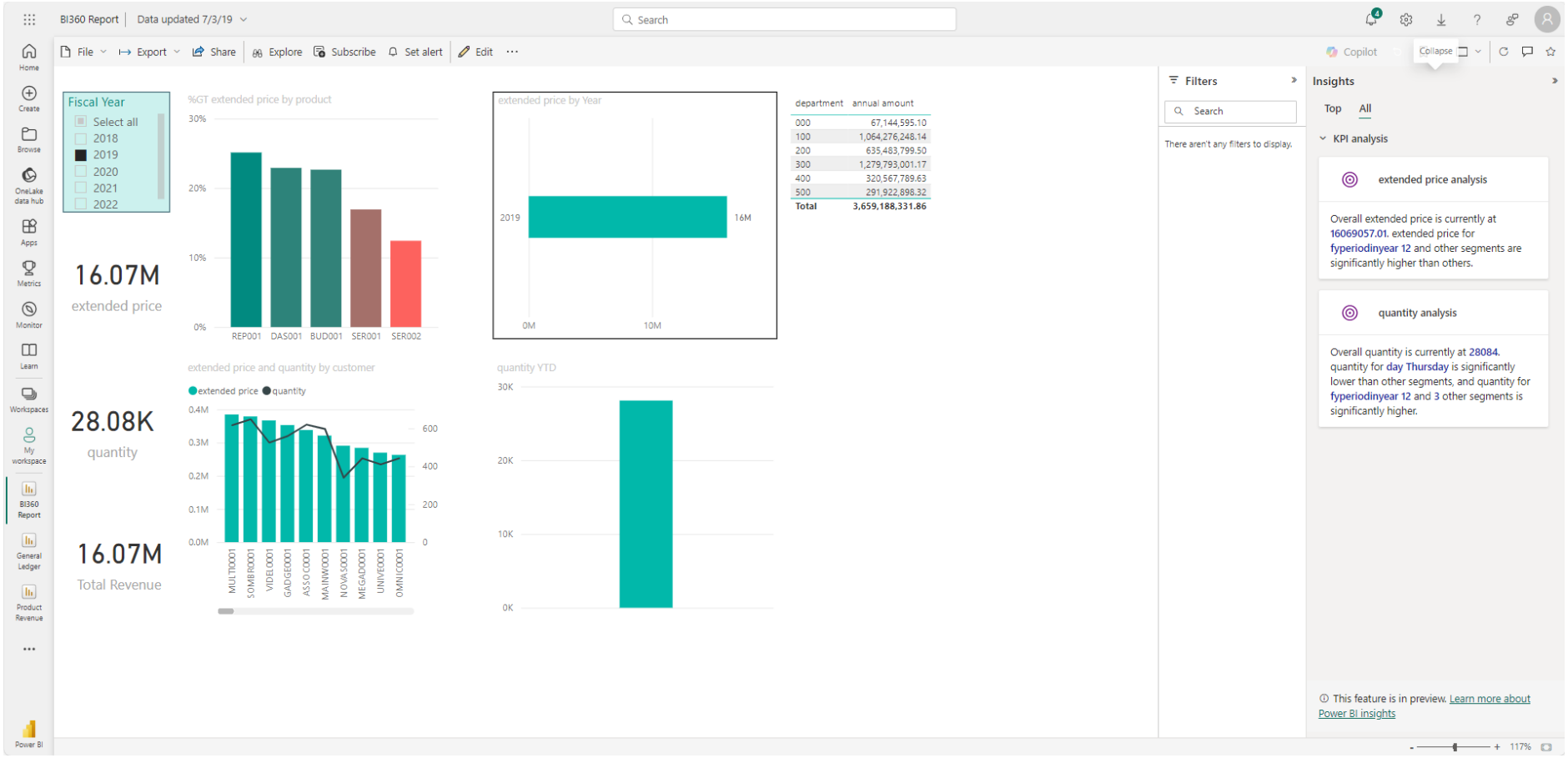
Insights
Get Insights



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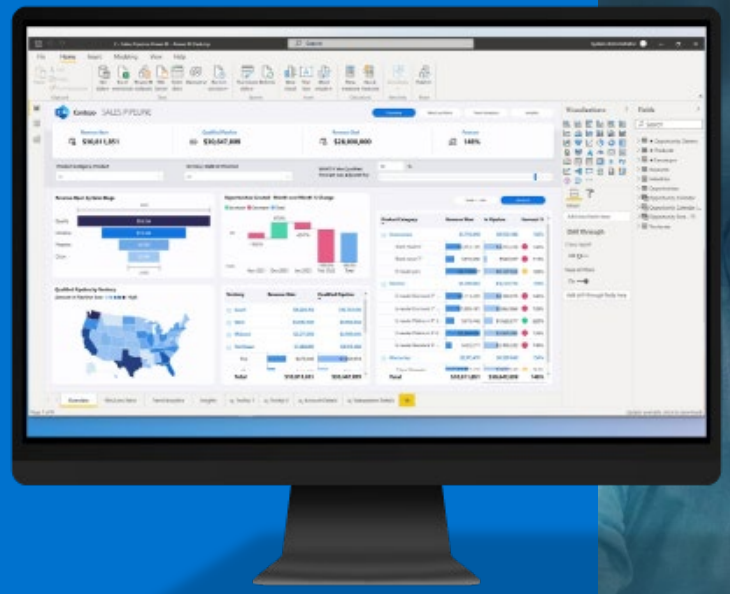
Demo

Microsoft Partner



02

Ad Hoc Reporting

Ad Hoc Reporting
Using Power BI Desktop

- Enable users to create their own reports
- Create a data source
- Provide Power BI Desktop training
- (Optional) Provide a Power BI file with the data loaded

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Ad Hoc Reporting
Explore Data

- Enables users to examine their data
- Users can create their own visualizations
- Visualizations can be saved

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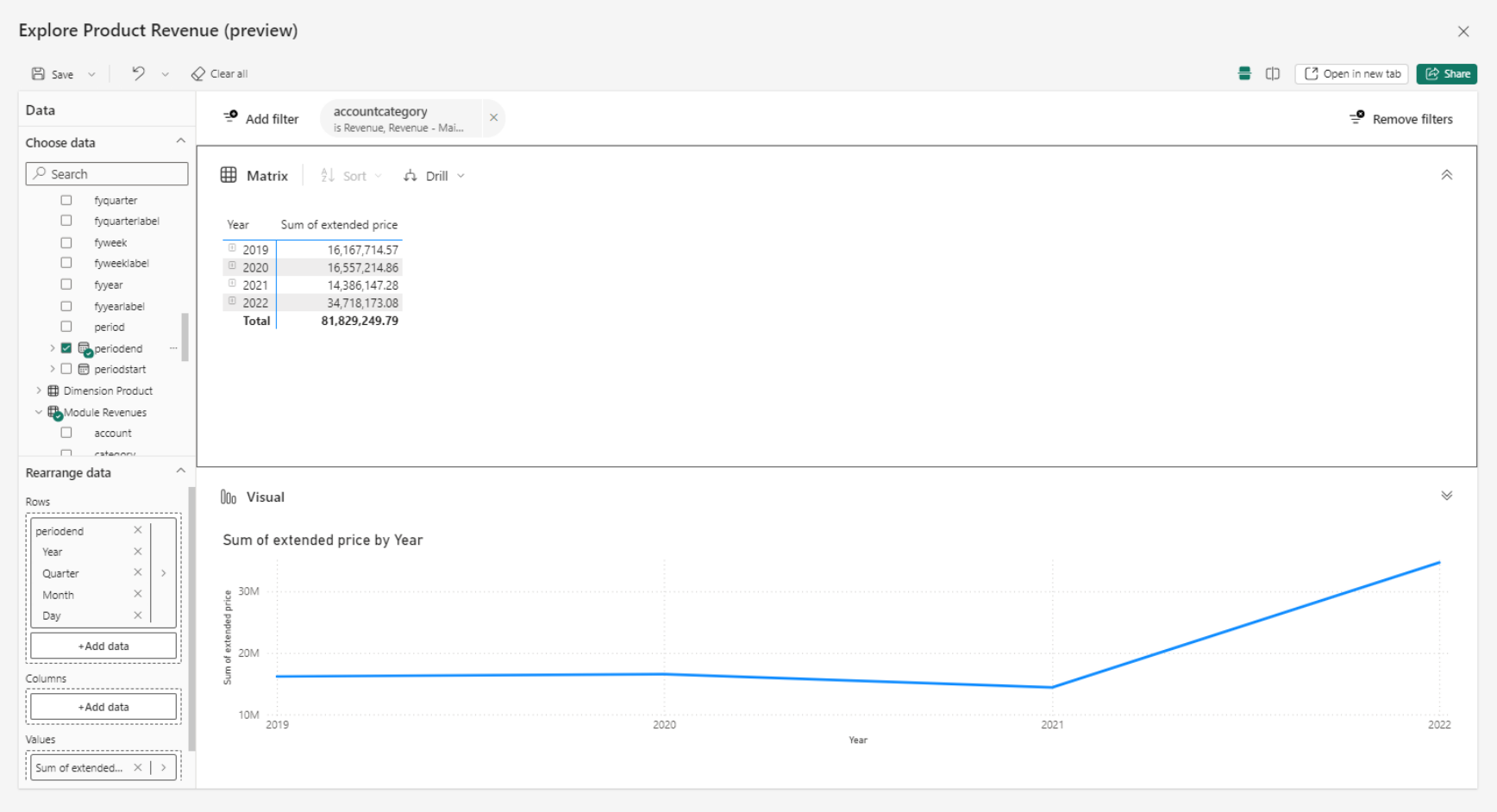
Ad Hoc Reporting
Explore Data



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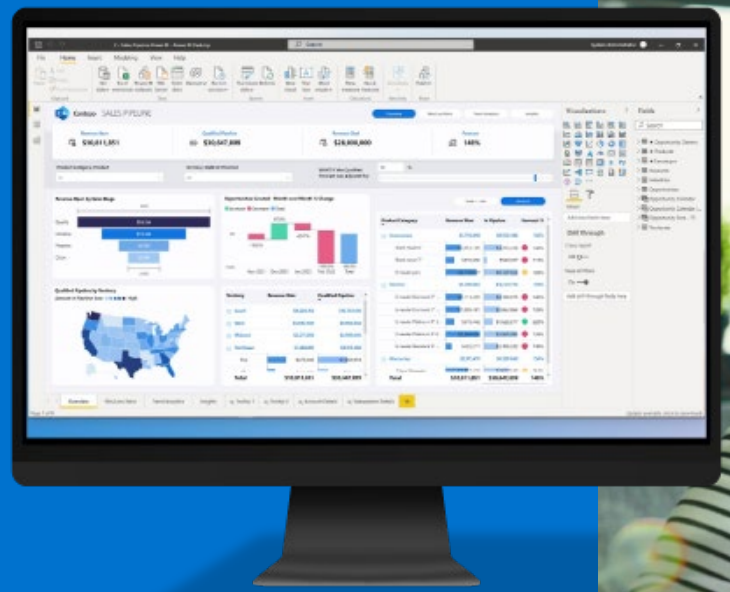
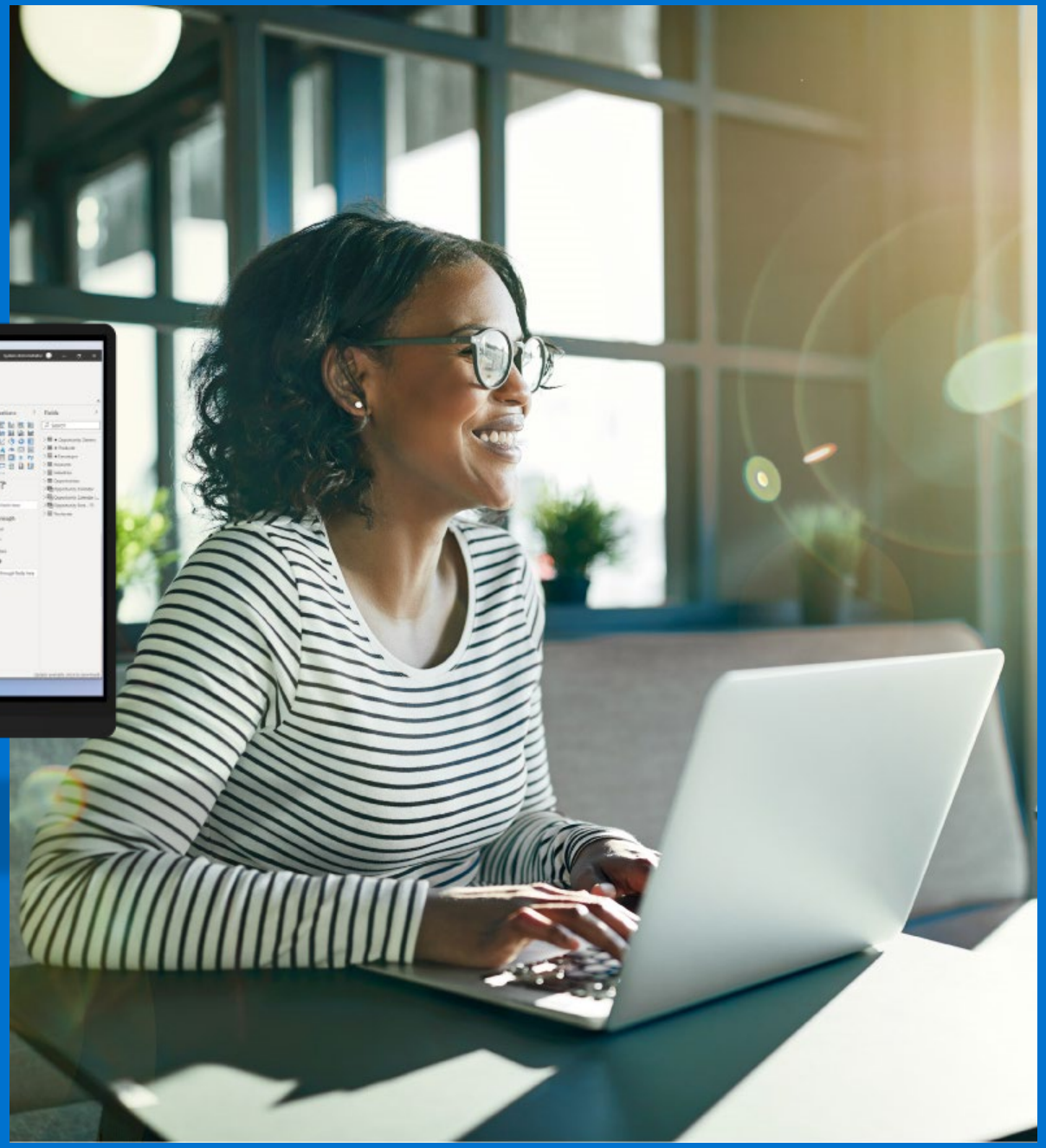
Demo

Microsoft Partner





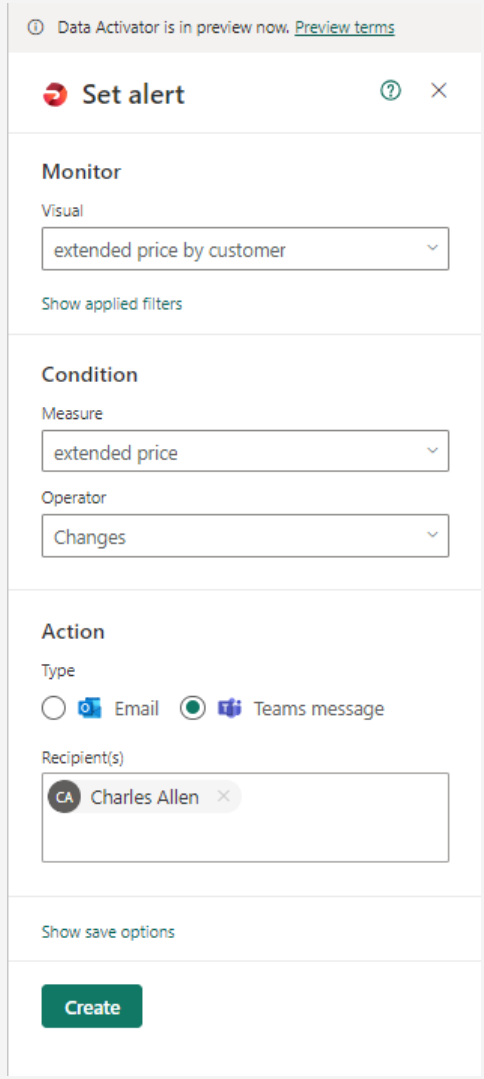
03

Alerts & Notifications

Tell me what I want to know & tell me now!

Alerts & Notifications
Alerts

- Notify you when conditions are met
- Send results by email or Teams



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Alerts & Notifications
Subscriptions

Two types: Standard & Dynamic

Standard – Sends one report

Dynamic – Sends a unique report result to each user

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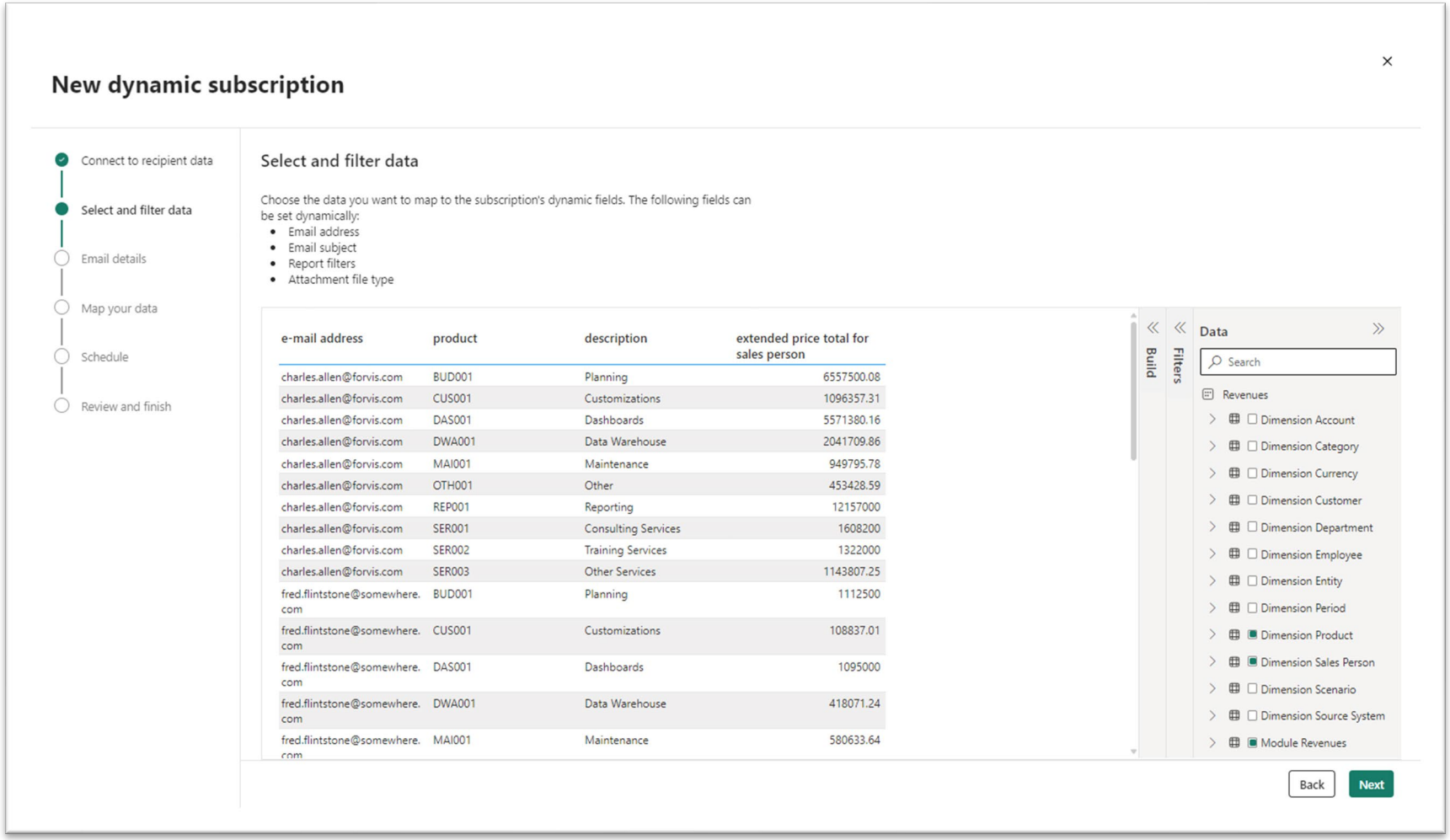
Subscriptions
Report Fields



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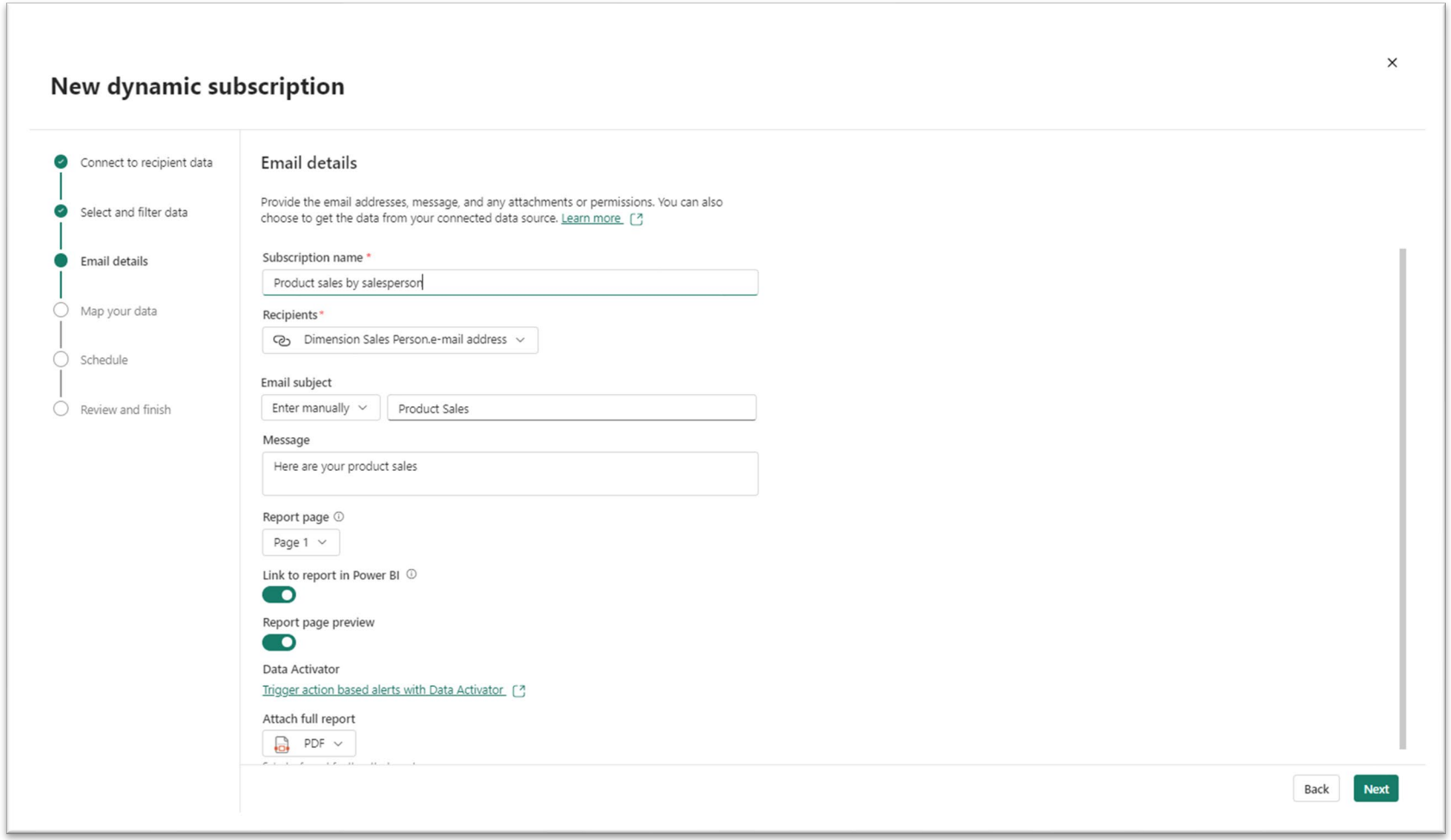
Subscriptions
Email Setup



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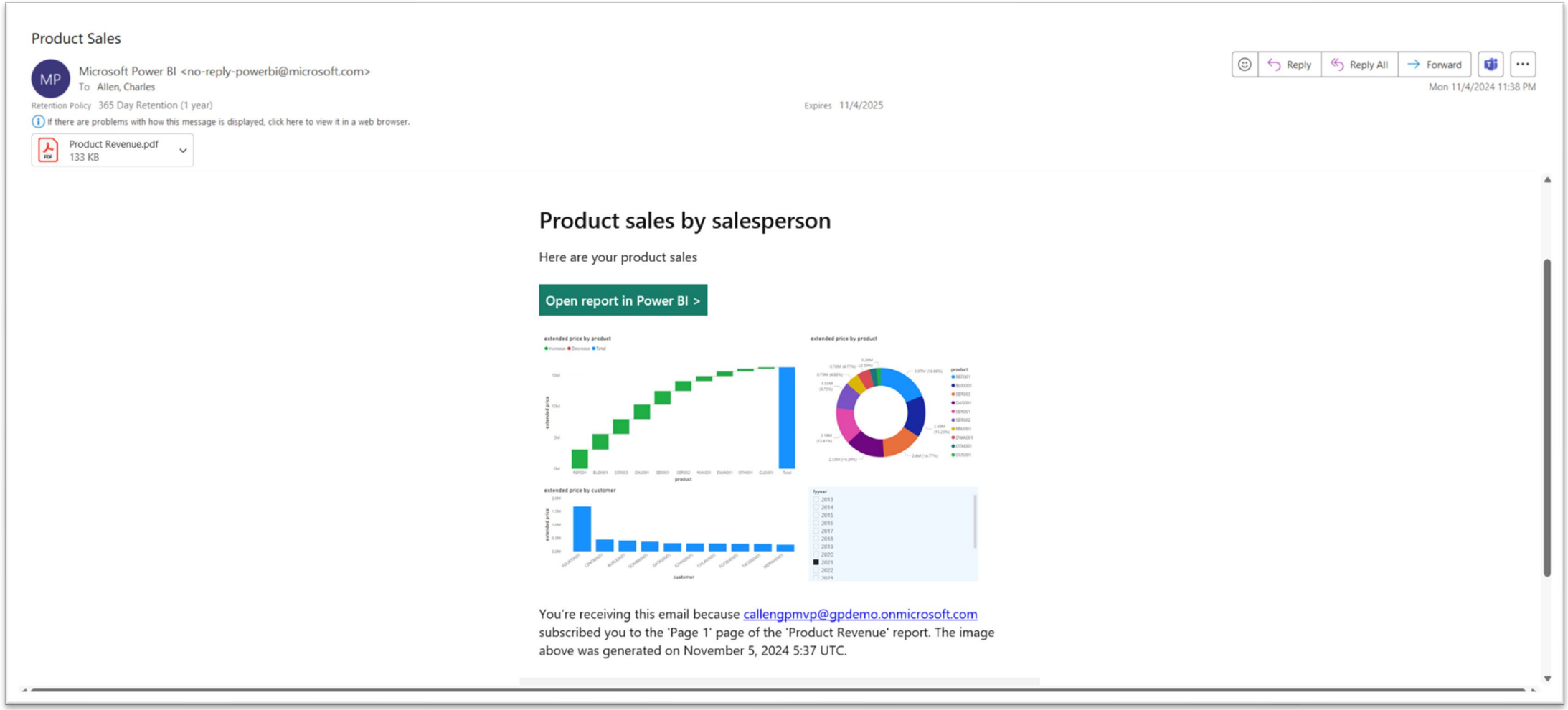
Subscriptions
The Report



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Demo

Microsoft
Partner

Q&A

Business Technology Services

Questions?

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Contact

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