



How to Get Insights From Power BI

November 21, 2024

U.S. Presence

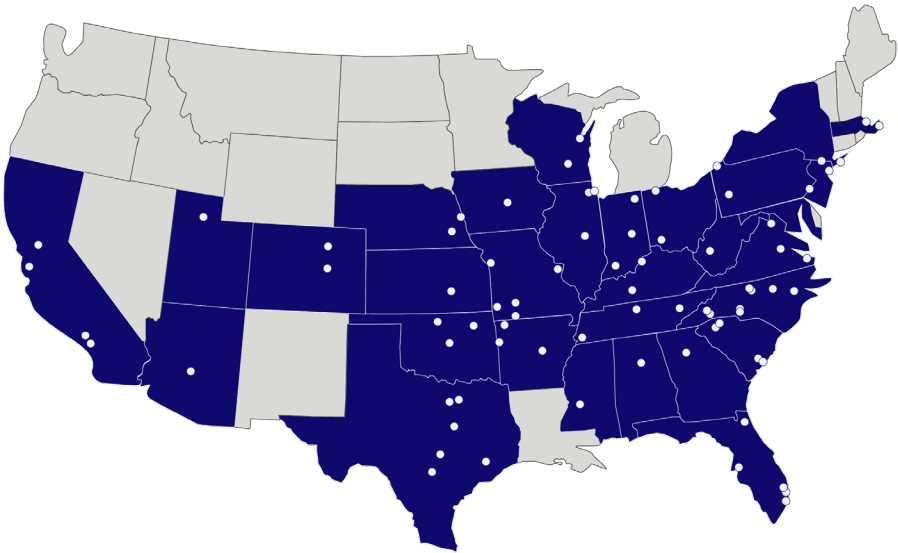
Top 10 \$2bn+

U.S. Public Accounting Firm* 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	Georgia Atlanta	Mississippi Jackson	North Carolina (cont) Greenville Hendersonville Raleigh Winston-Salem	Tennessee Knoxville Memphis Nashville
Arizona Phoenix	Illinois Chicago Downtown Chicago Oakbrook Terrace Decatur	Missouri Branson Joplin Kansas City Springfield St. Louis	Ohio Cincinnati Toledo	Texas Austin Dallas Fort Worth Houston San Antonio Waco
Arkansas Fort Smith Little Rock Rogers	Indiana Evansville Fort Wayne Indianapolis	Nebraska Lincoln Omaha	Oklahoma Enid Oklahoma City Tulsa	Utah Salt Lake City
California Irvine Los Angeles Sacramento San Jose	Iowa Des Moines	New Jersey Iselin	Pennsylvania Erie Fort Washington Pittsburgh	Virginia Norfolk Richmond Tysons, VA
Colorado Colorado Springs Denver	Kansas Wichita	New York Long Island New York City	South Carolina Charleston Greenville Spartanburg Summerville	West Virginia Charleston
Florida Boca Raton Jacksonville Miami Tampa Bay West Palm Beach	Kentucky Bowling Green Louisville	North Carolina Asheville Charlotte SouthPark Charlotte Uptown Greensboro		Wisconsin Appleton, WI Madison, WI
	Massachusetts Boston Brewster Boston State Street			

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



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

forvis
mazars

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

charles.allen@us.forvismazars.com



How to Get Insights From Power BI

November 21, 2024

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



Agenda

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



01

Insights

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

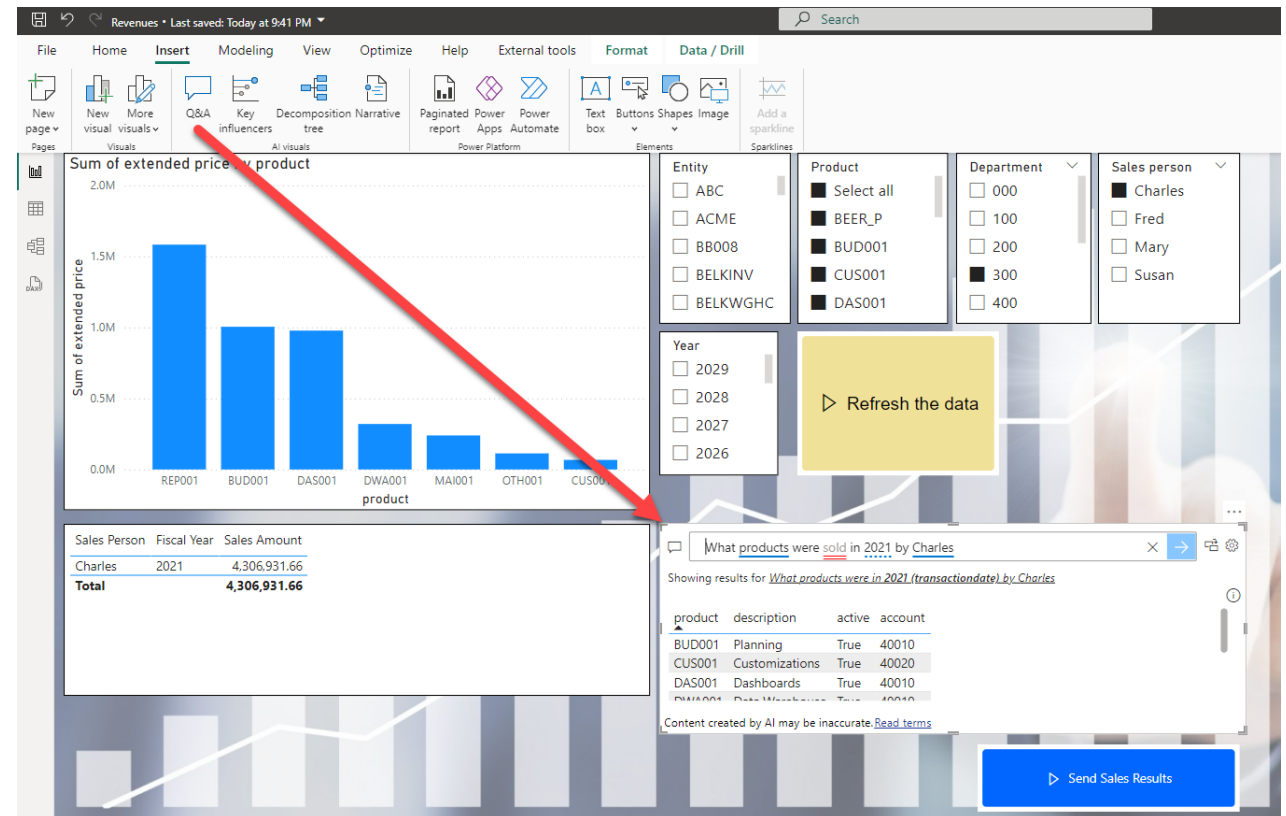
— Jay Baer



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>



Insights

Q&A in Power BI Service

Q&A setup

Getting started

Synonyms


Relationships

Teach Q&A

Review questions

Suggest questions


Getting started



Synonyms

Add terms people might use as synonyms for the fields and tables in your data.


Synonyms



Review questions

Review questions people have asked and fix misunderstandings.


Review questions



Teach Q&A

Teach Q&A to understand questions and terms people might use.

Teach Q&A




Suggest questions


Help people explore your data by adding suggested questions.

Suggest questions

Help Q&A understand people better




[Learn more about Q&A](#)

 Improve Q&A with synonyms from Copilot (preview) and your org


Content created by AI may not be accurate, so review it carefully. [Read terms](#)

Add synonyms

 This feature is in preview. [Learn more](#)

How to Get Insights From Power BI

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Insights

Get Insights

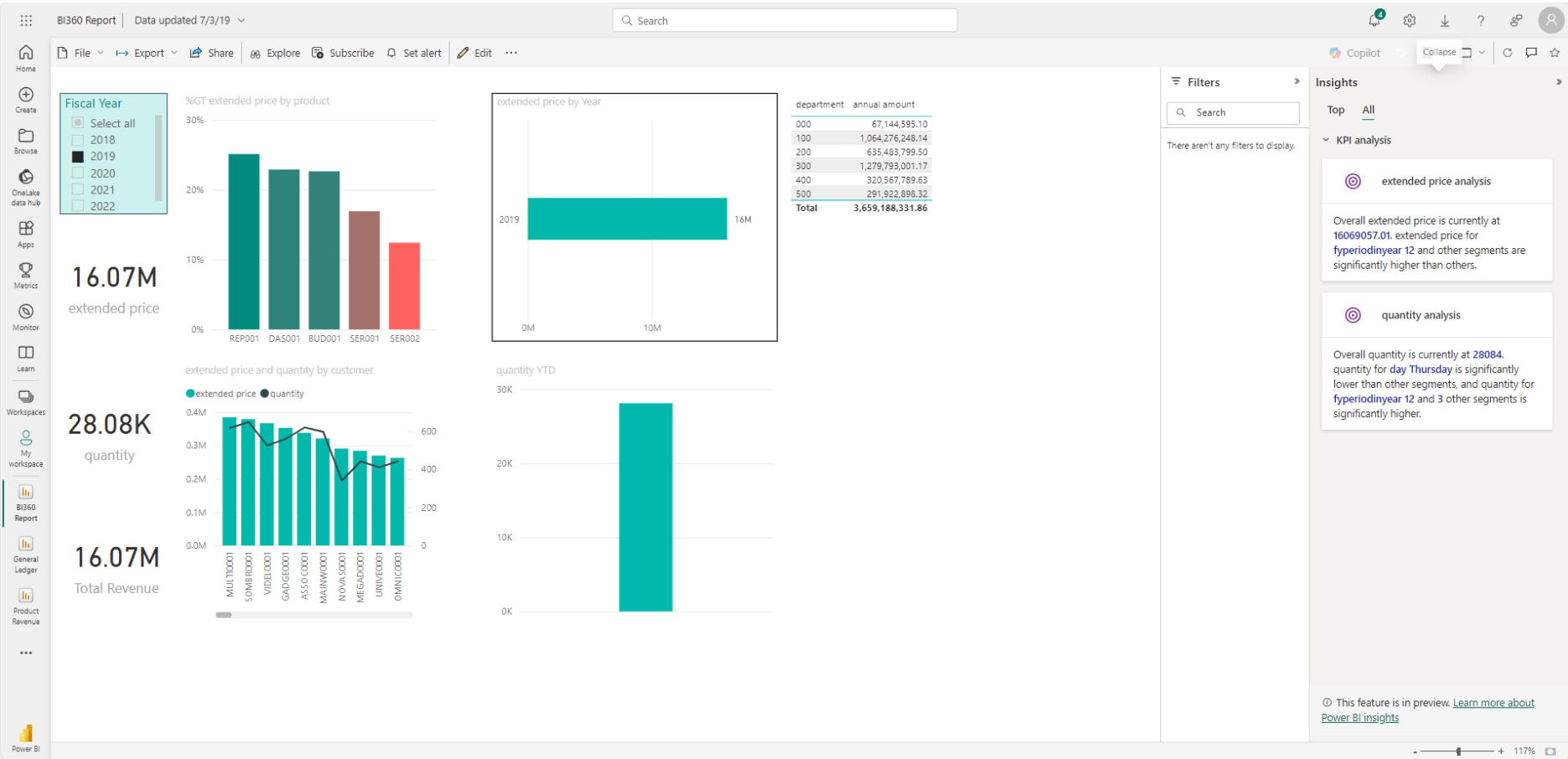
Searches the visualizations & provides information about them

Only works with certain types of visualizations

Requires Power BI Premium

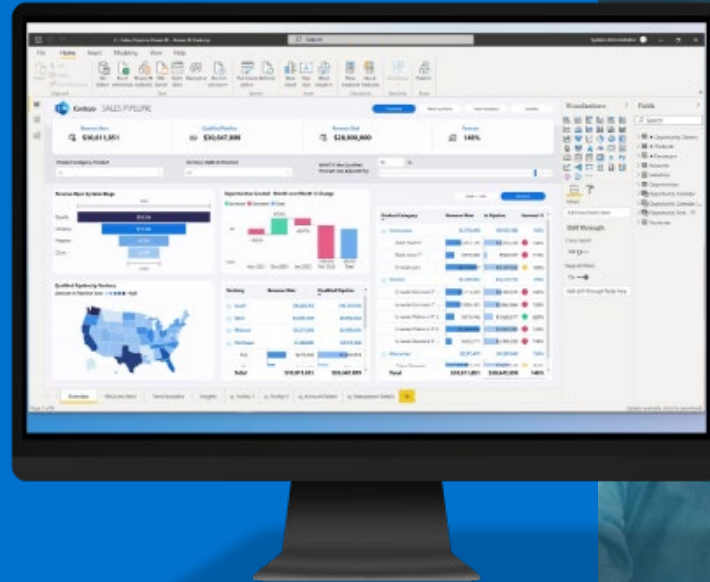
Insights

Get Insights



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

Ad Hoc Reporting

Explore Data

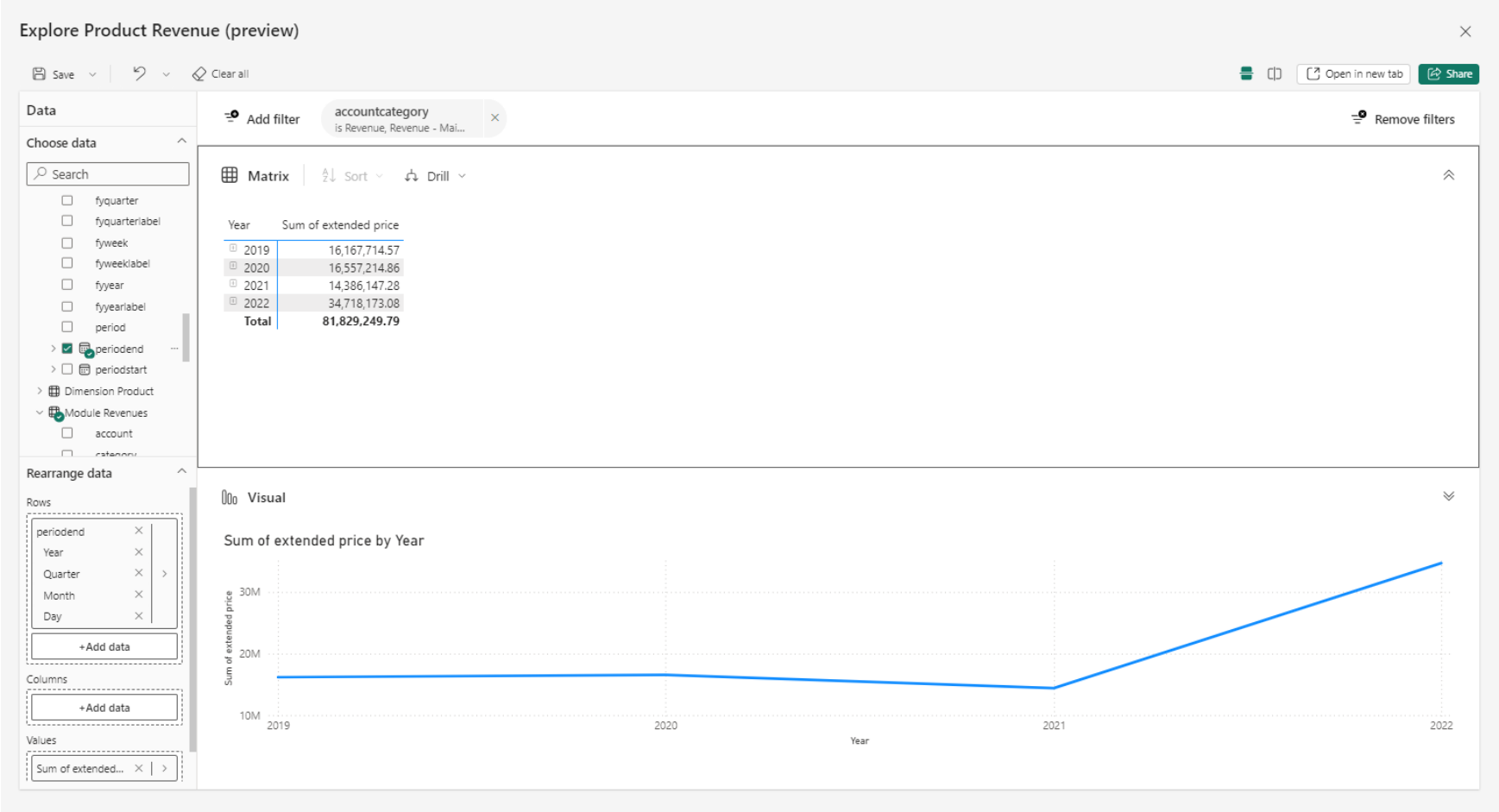
Enables users to examine their data

Users can create their own visualizations

Visualizations can be saved

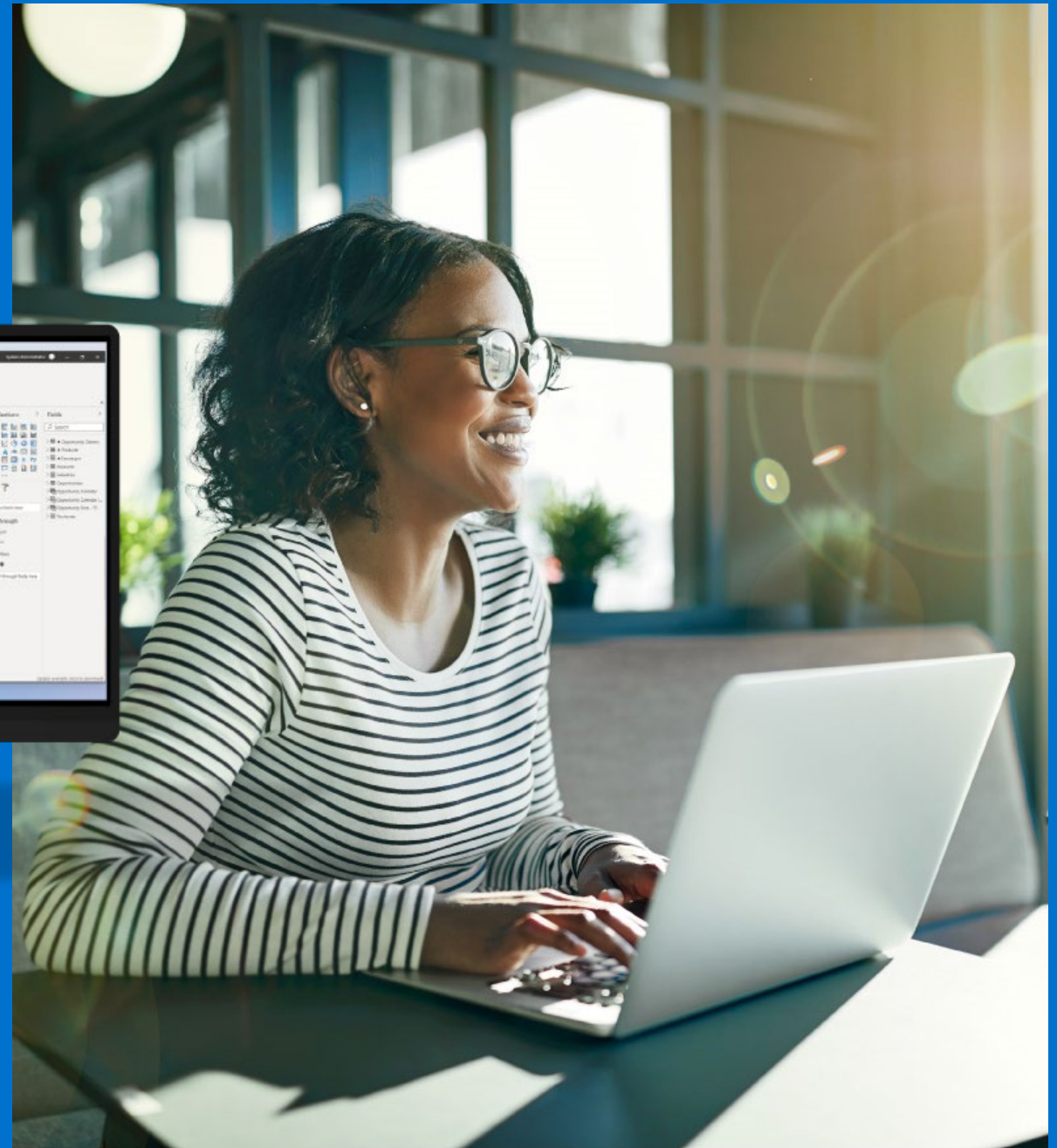
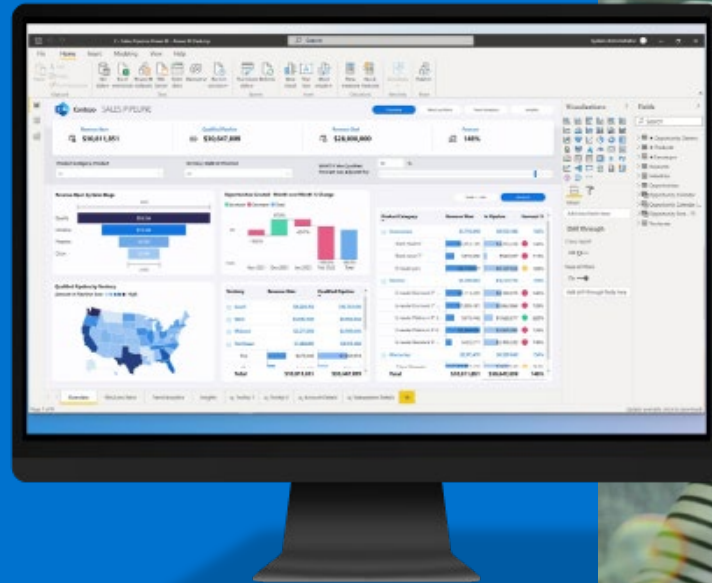
Ad Hoc Reporting

Explore Data



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

① Data Activator is in preview now. [Preview terms](#)

Set alert

Monitor

Visual

extended price by customer

[Show applied filters](#)

Condition

Measure

extended price

Operator

Changes

Action

Type

☐ Email ☒ Teams message

Recipient(s)

CA Charles Allen

[Show save options](#)

Create

Alerts & Notifications

Subscriptions

Two types: Standard & Dynamic

Standard – Sends one report

Dynamic – Sends a unique report result to each user

Subscriptions

Report Fields

New dynamic subscription

Connect to recipient data

Select and filter data

Email details

Map your data

Schedule

Review and finish

Select and filter data

Choose the data you want to map to the subscription's dynamic fields. The following fields can be set dynamically:

Email address

Email subject

Report filters

Attachment file type

e-mail address	product	description	extended price total for sales person
charles.allen@forvis.com	BUD001	Planning	6557500.08
charles.allen@forvis.com	CUS001	Customizations	1096357.31
charles.allen@forvis.com	DAS001	Dashboards	5571380.16
charles.allen@forvis.com	DWA001	Data Warehouse	2041709.86
charles.allen@forvis.com	MAI001	Maintenance	949795.78
charles.allen@forvis.com	OTH001	Other	453428.59
charles.allen@forvis.com	REP001	Reporting	12157000
charles.allen@forvis.com	SER001	Consulting Services	1608200
charles.allen@forvis.com	SER002	Training Services	1322000
charles.allen@forvis.com	SER003	Other Services	1143807.25
fred.flintstone@somewhere.com	BUD001	Planning	1112500
fred.flintstone@somewhere.com	CUS001	Customizations	108837.01
fred.flintstone@somewhere.com	DAS001	Dashboards	1095000
fred.flintstone@somewhere.com	DWA001	Data Warehouse	418071.24
fred.flintstone@somewhere.com	MAI001	Maintenance	580633.64

Build

Filters

Data

Search

Revenues

>

Dimension Account

>

Dimension Category

>

Dimension Currency

>

Dimension Customer

>

Dimension Department

>

Dimension Employee

>

Dimension Entity

>

Dimension Period

>

Dimension Product

>

Dimension Sales Person

>

Dimension Scenario

>

Dimension Source System

>

Module Revenues

Back

Next

Subscriptions

Email Setup

New dynamic subscription

Connect to recipient data

Select and filter data

Email details

Map your data

Schedule

Review and finish

Email details

Provide the email addresses, message, and any attachments or permissions. You can also choose to get the data from your connected data source. [Learn more](#)

Subscription name *
Product sales by salesperson

Recipients *
Dimension Sales Person.e-mail address

Email subject
Enter manually Product Sales

Message
Here are your product sales

Report page
Page 1

Link to report in Power BI
☒

Report page preview
☒

Data Activator
[Trigger action based alerts with Data Activator](#)

Attach full report
PDF

Back

Next

Subscriptions

The Report

Product Sales



Microsoft Power BI <no-reply-powerbi@microsoft.com>
To: Allen, Charles

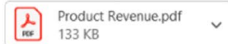
Retention Policy 365 Day Retention (1 year)

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Expires 11/4/2025

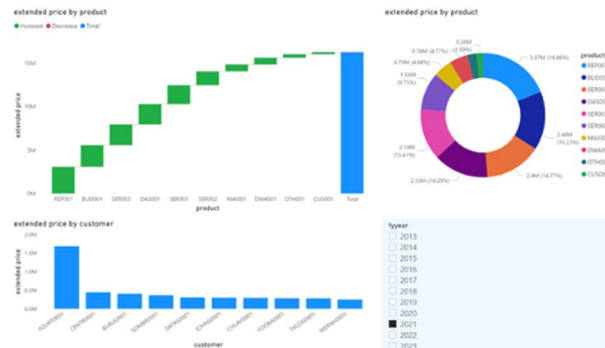


Mon 11/4/2024 11:38 PM



Product sales by salesperson

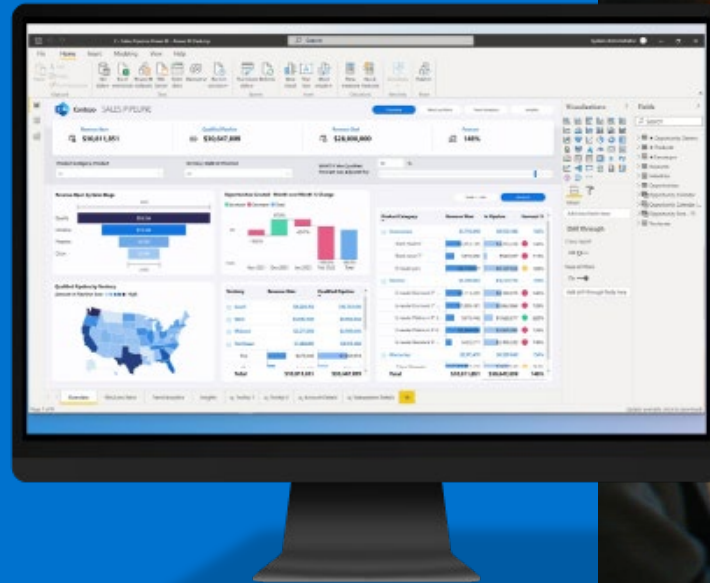
Here are your product sales

[Open report in Power BI >](#)

You're receiving this email because callengpmvp@gpdemo.onmicrosoft.com subscribed you to the 'Page 1' page of the 'Product Revenue' report. The image above was generated on November 5, 2024 5:37 UTC.

Demo

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Q&A



Business
Technology
Services

Questions?

Contact

Forvis Mazars



Charles Allen

Senior Manager

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