



Power BI - Ask Us Anything



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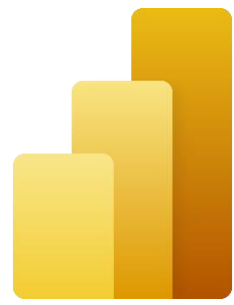
DEPAUL
Homelessness has no place



Josh Rosekilly

Insight Manager


sense



Power BI - Ask Us Anything



1. Introduction to the session and panel (5 mins)
2. Top tips from the panel (10 mins)
3. Ask us Anything! (30 mins)

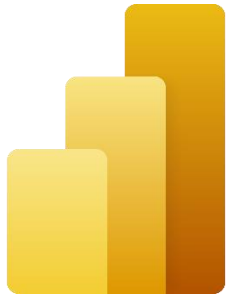


Power BI - Ask Us Anything



Any Questions?

Power BI as a tool for fundraising



Power BI is often seen as a tech tool, but in practice, it's one of the most powerful ways to help fundraisers, finance teams, and trustees get on the same page.

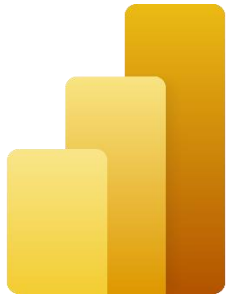
Most people say they learn best using visual or hand's-on methods. At its core Power BI leans into both, allowing people to access information in a way that suits them.

Always on and capable of automatically refreshing, Power BI reduces the speed at which insights can be uncovered and understood by the organisation.

Tighter control of data processing and definitions means you increase the consistency and trust in the data and reporting that is produced.

Easily combining data from multiple sources means understanding supporters is quicker and easier than ever. Being able to use these insights in your journeys is a fundraising superpower.

Pro vs Premium – choose wisely



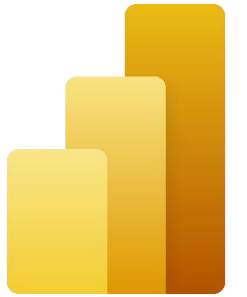
Top Tip: Licensing is almost always a headache!

- Pro licences are great for general collaboration, but they have limits on dataset size and refresh frequency.
- Premium Per User, or PPU, unlocks advanced features. And for charities, it's often far cheaper to buy 5–10 PPU licences for your analysts and keep everyone else on Pro, rather than spring for full Premium capacity.

Current standard pricing: Microsoft offer NFP discounts which can significantly reduce these costs:

Free account	Power BI Pro	Power BI Premium Per User	Power BI Embedded
Free	£10.80 user/month, paid yearly	£18.50 user/month, paid yearly	Variable
Create rich, interactive reports that put visual analytics at your fingertips.	Access Power BI reports shared with you and publish your own for an even bigger impact.	License data professionals with access to enterprise-scale features. ²	Create customer-facing reports, dashboards, and analytics in your own applications.
• Included in Microsoft Fabric free account • No credit card required • Upgrade to Pro or Premium to share reports	• Publish and share Power BI reports • Included in Microsoft 365 E5 and Office 365 E5 • Available to buy now with a credit card¹	• Includes all the features available with Power BI Pro • Access larger model sizes • More frequent refreshes • Available to buy now with a credit card¹	• Brand Power BI reports as your own • Automate monitoring, management, and deployment • Reduce developer overhead

Optimise your distribution



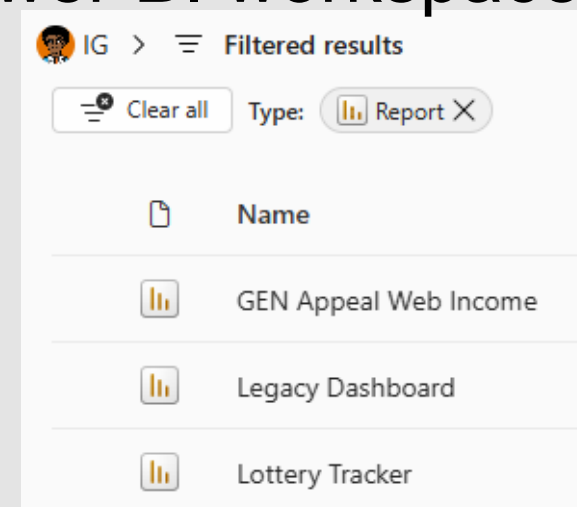
There are so many ways to give people access to Power BI reports. Every organisation, team, and individual with have their own preference for access and consumption.

Send the pbix file to anyone directly.



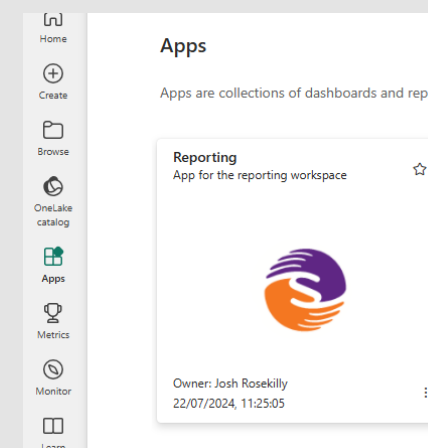
Top Tip: don't do this

Publish the report to Power BI workspace(s)



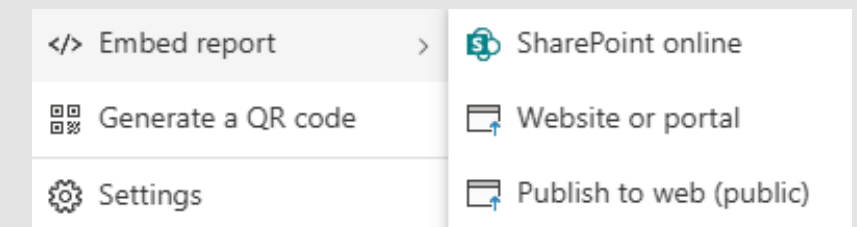
Great for collaboration

Distribute reports in custom apps



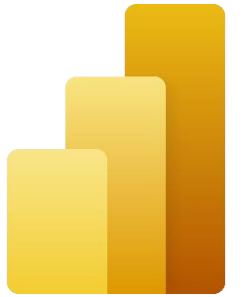
Great for read-only users

Embed the reports in other environments

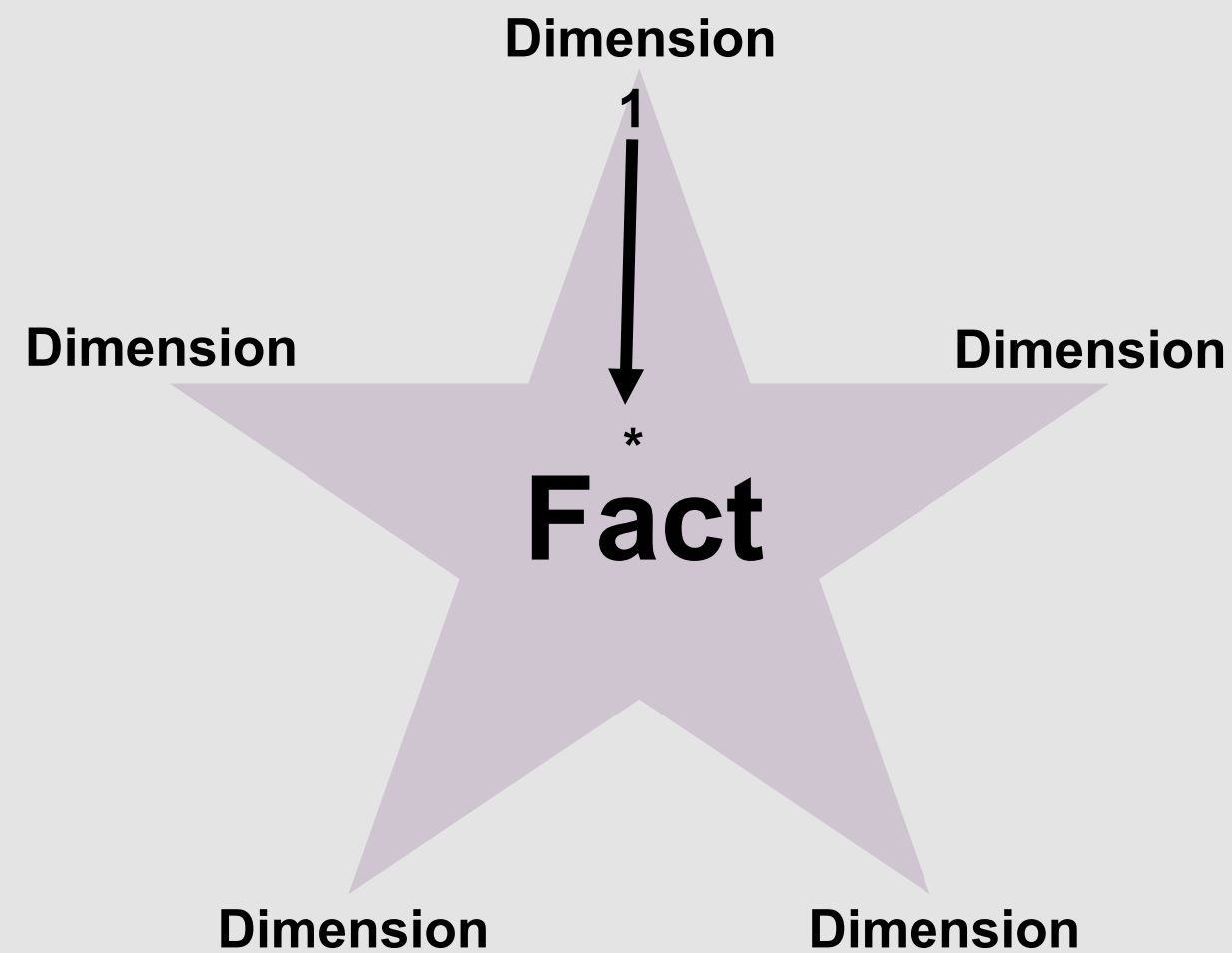


Ultimate flexibility – but be careful with (public)

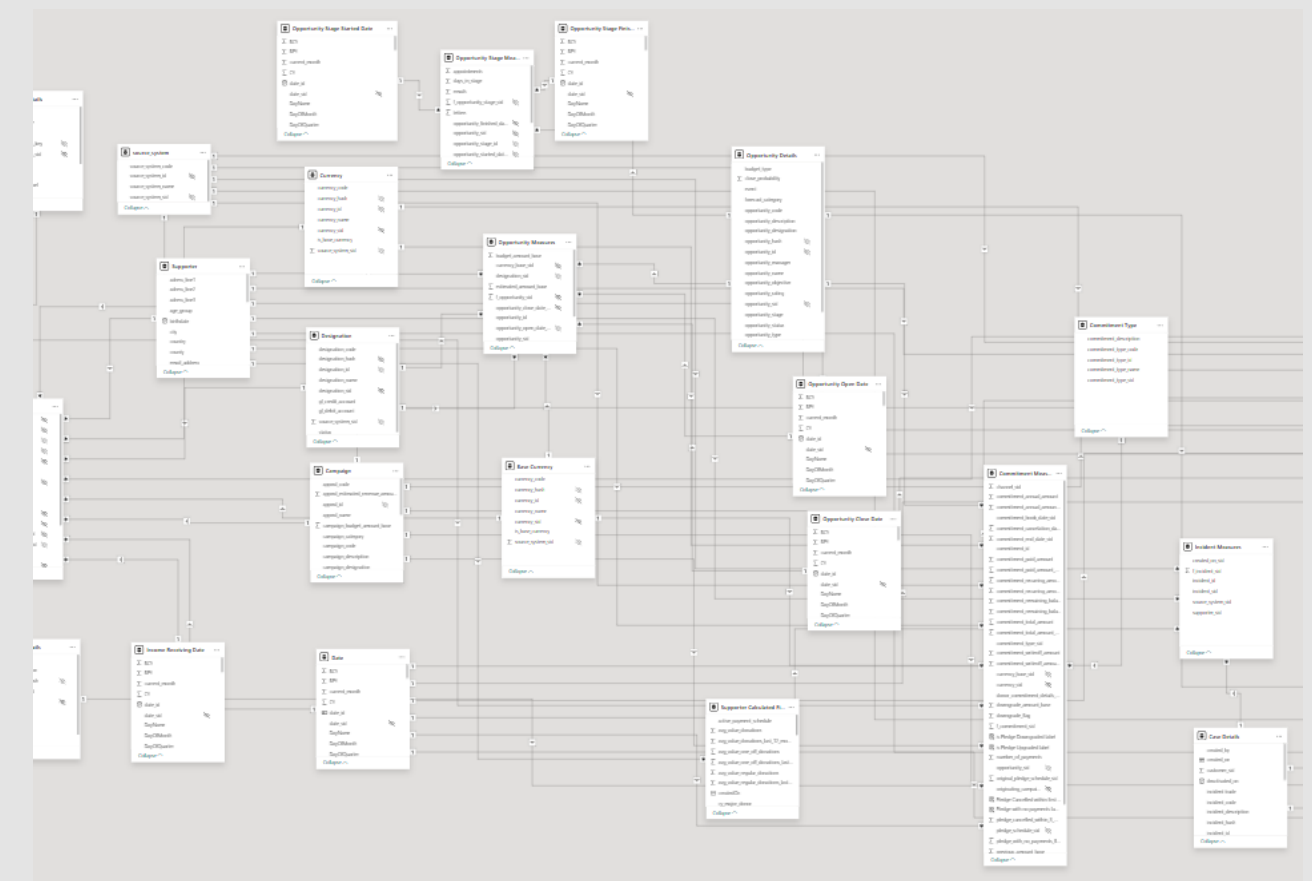
Be a semantic model star



Following a Star Schema in your data model will lead to better usability, simpler DAX, better performance, and faster refreshes.

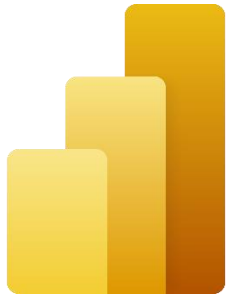


But don't worry too much if it's not that simple: (real sample from Sense)



Top Tip: You can create separate diagrams containing just the tables that are relevant to a subject area.

One clean well, not 20 muddy puddles

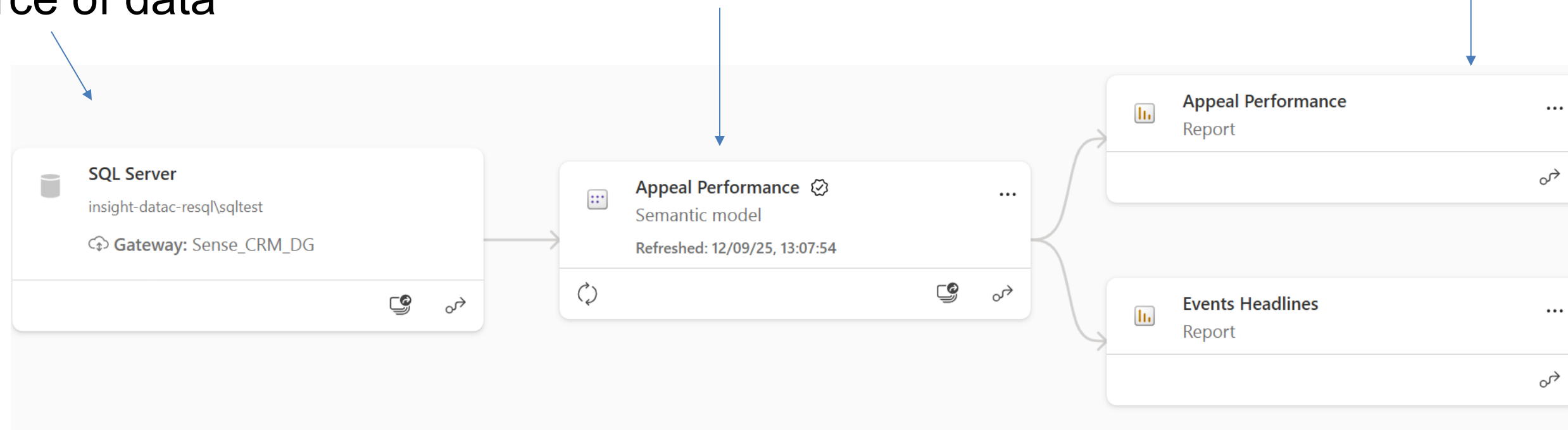


Top Tip: Try to create a single 'Golden Dataset' for each domain

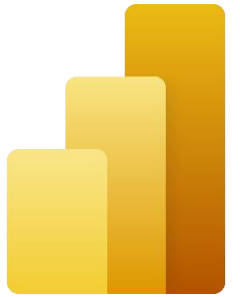
Power BI works best with a Datawarehouse or similar single source of data

Create one "Golden" semantic model

Use the golden model to create multiple reports and distribute across different workspaces and apps.



Time intelligence



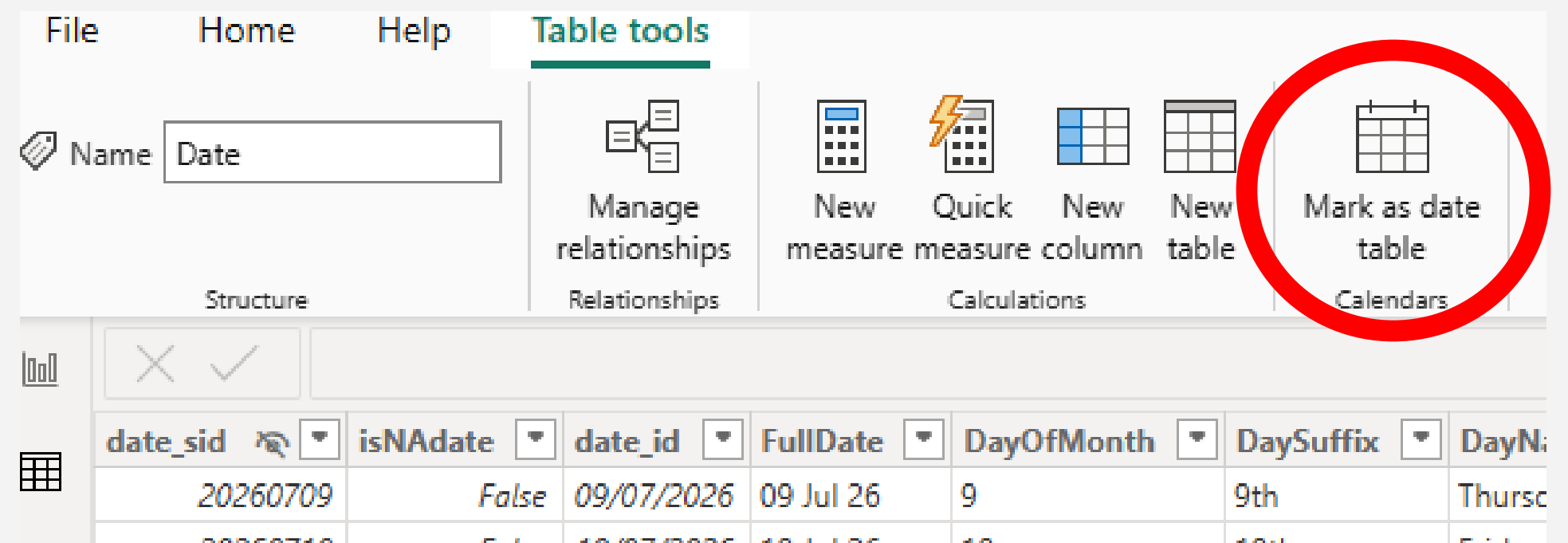
Dates tables are essential for effective data analysis. They allow for **dynamic reporting** and enhance the storytelling aspect of your fundraising efforts, ensuring your insights are impactful and accessible

There are some shortcuts: `Dates = CALENDARAUTO([FiscalYearEndMonth])`, but be aware that these can sometimes have unexpected consequences.

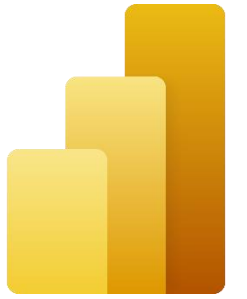
Top Tip: create a script to cover many scenarios and deploy this on all reports.

```
1 let
2     // configurations start
3     Today=Date.From(DateTime.LocalNow()), // today's date
4     FromYear = 2018, // set the start year of the date dimension. dates start from 1st of January of
5     ToYear=2021, // set the end year of the date dimension. dates end at 31st of December of this year
6     StartOfFiscalYear=7, // set the month number that is start of the financial year. example; if fiscal
7     firstDayOfWeek=Day.Monday, // set the week's start day, values: Day.Monday, Day.Sunday....
8     // configuration end
9     FromDate=#date(FromYear,1,1),
10    ToDate=#date(ToYear,12,31),
11    Source=List.Dates(
12        FromDate,
13        Duration.Days(ToDate-FromDate)+1,
14        #duration(1,0,0,0)
15    ),
16    #"Converted to Table" = Table.FromList(Source, Splitter.SplitByNothing(), null, null, ExtraValues.Error),
17    #"Renamed Columns" = Table.RenameColumns(#"Converted to Table",{"Column1", "Date"}),
18    #"Changed Type" = Table.TransformColumnTypes(#"Renamed Columns",{"Date", type date}),
19    #"Inserted Year" = Table.AddColumn(#"Changed Type", "Year", each Date.Year([Date]), Int64.Type),
20    #"Inserted Start of Year" = Table.AddColumn(#"Inserted Year", "Start of Year", each Date.StartOfYear([Date]), Date.Type),
21    #"Inserted End of Year" = Table.AddColumn(#"Inserted Start of Year", "End of Year", each Date.EndOfYear([Date]), Date.Type),
22    #"Inserted Month" = Table.AddColumn(#"Inserted End of Year", "Month", each Date.Month([Date]), Int64.Type),
23    #"Inserted Start of Month" = Table.AddColumn(#"Inserted Month", "Start of Month", each Date.StartOfMonth([Date]), Date.Type)
```

Don't forget – you need to tell Power BI that it's a date table

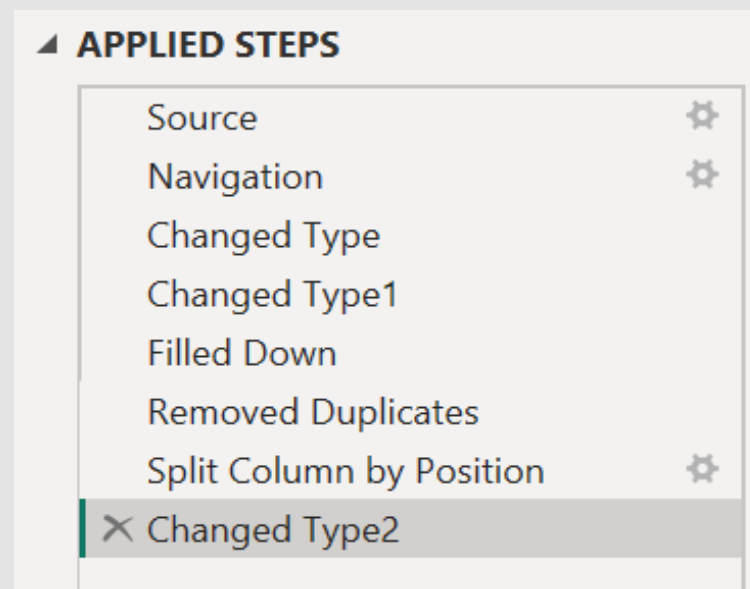


Remember, you will forget

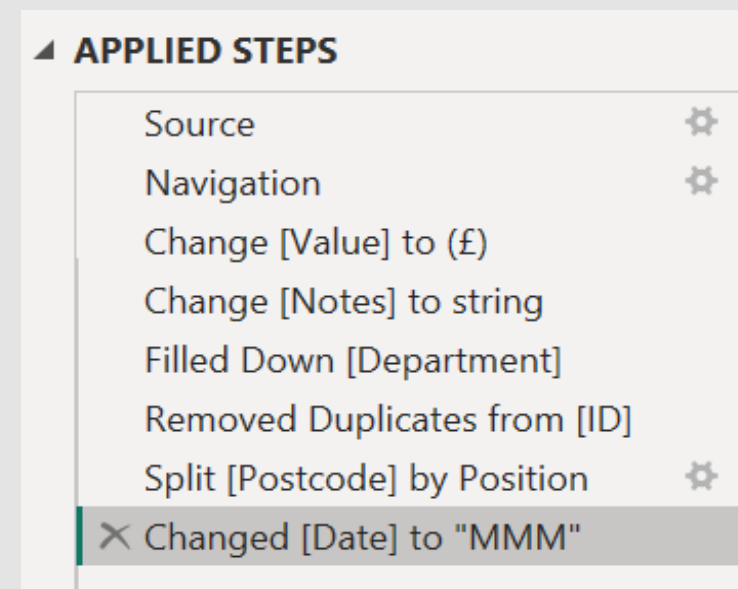


The backend of Power BI reports can get very complicated, very quickly. Do future you a favour, document and label as you go.

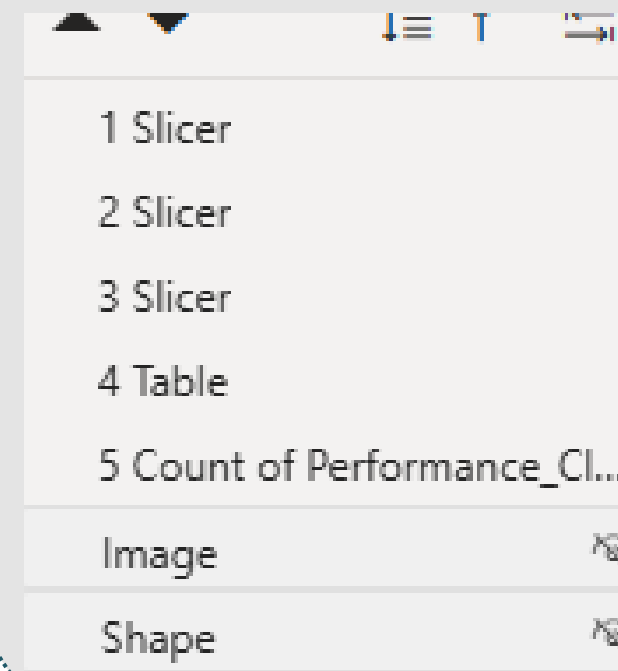
Top Tip: Rename Power Query steps to aid in comprehension



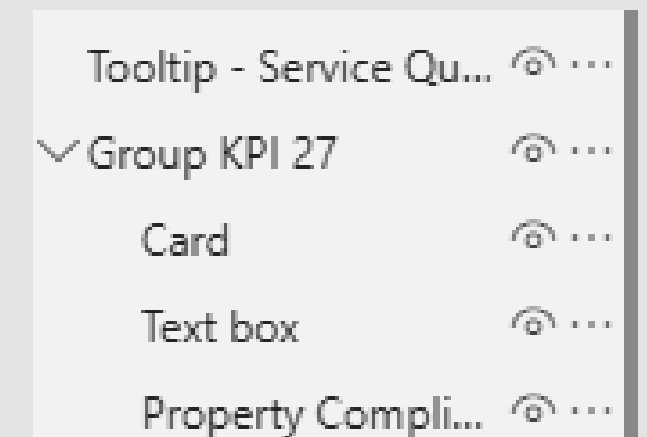
Vs



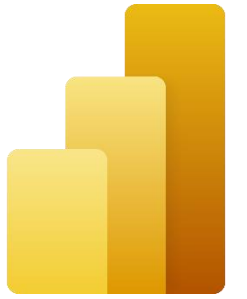
Top Tip: Rename page objects and add them to groups so you don't lose track of everything



Vs



Optimise for size and purpose



Visualizations >>

Format page

Search

> Page information

✓ Canvas settings

Type
16:9

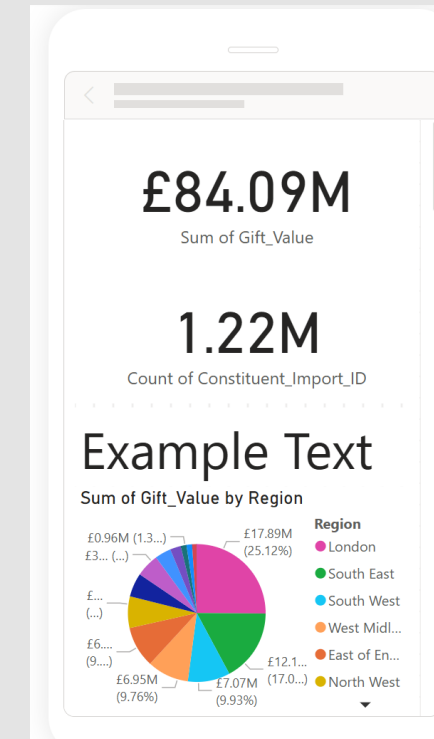
Height
720 px

Width
1280 px

Vertical alignment
Top

Reset to default

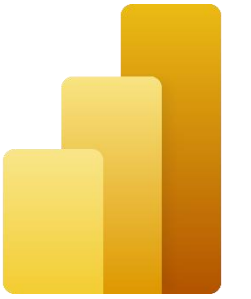
Choosing the right canvas size is crucial for effective storytelling in your fundraising reports. A well-optimized layout enhances **data accessibility** and ensures your message reaches your audience clearly



You can create mobile compatible versions of your reports. Fantastic for those on-the-go (or if you want a good excuse when caught looking at your phone in a meeting!)

Top Tip: You can even create report pages that are designed to act as tooltip pop ups on other visuals – adding whole new layers of information and interactivity to your reports.

Utilise External Tools



Power BI is always improving its functionality and UI. But external tools and extensions can massively simplify tasks, improve the creation process, and enhance the analytical capabilities.

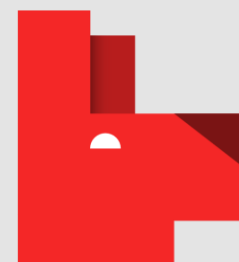


for copying DAX between reports and performance tuning



TABULAR
EDITOR

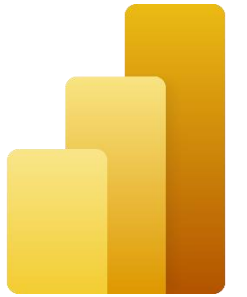
for managing measures in bulk



Bravo
FOR POWER BI

for formatting your DAX so it's consistent and readable.

DAX is where the magic happens



DAX is the formula expression language that enables many of the advanced calculations and capabilities of Power BI.

You can use it for measures, calculated columns, calculated tables, and row-level security.

Some great use cases for fundraising are:

- Appeal performance:

`SUM, AVERAGE, MEDIAN, MIN, MAX ...`

- Time Intelligence comparisons:

`TOTALYTD, SAMEPERIODLASTYEAR, DATEDIFF ...`

- Donor Information:

`COUNT, DISTINCTCOUNT, RANKX ...`

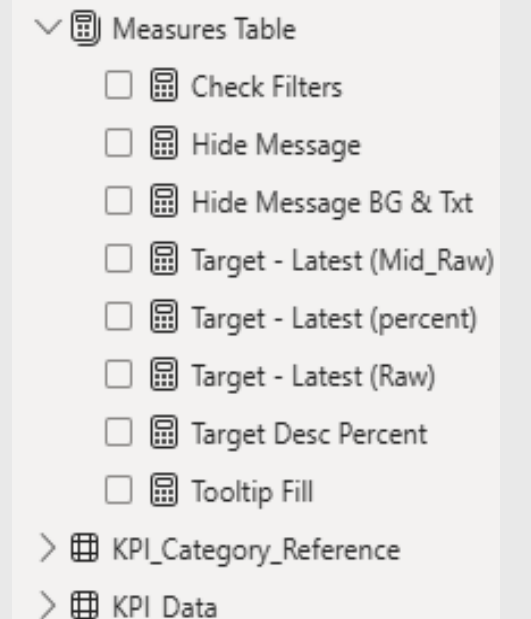
- Cumulative Donations:

`CALCULATE([Gift Amount], DATESYTD('Date'[Date]))`

Top Tip: “Filter Context” is one of the most important concepts to help you master DAX.

Top Tip: It is best practice not to use the “implicit measures (Σ)” created by Power BI.

Top Tip: Set up an empty table called “Measures” to store and manage your codes. It will make ongoing management and editing a whole lot easier.



Style and Formatting



Try and use the branding and style guides from your organization and use images that share your tone and values.

Top Tip: Create and save “Themes” to save you time when creating reports.

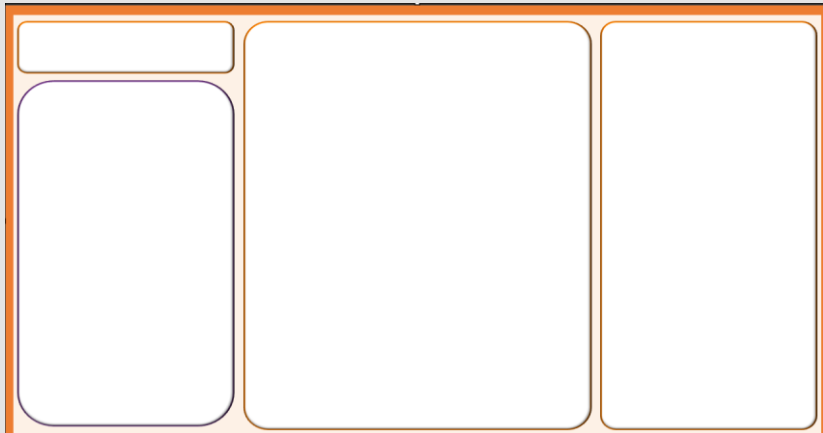
Customize theme	Name and colors	Name and colors		
Name and colors	Advanced	Name		
Text		Theme Example		
Visuals		Theme colors		
Page		Color 1	Color 2	Color 3
Filter pane		▼	▼	▼

Top Tip: Curate a library of high-quality brand assets to use across your reports and enhance their appeal.

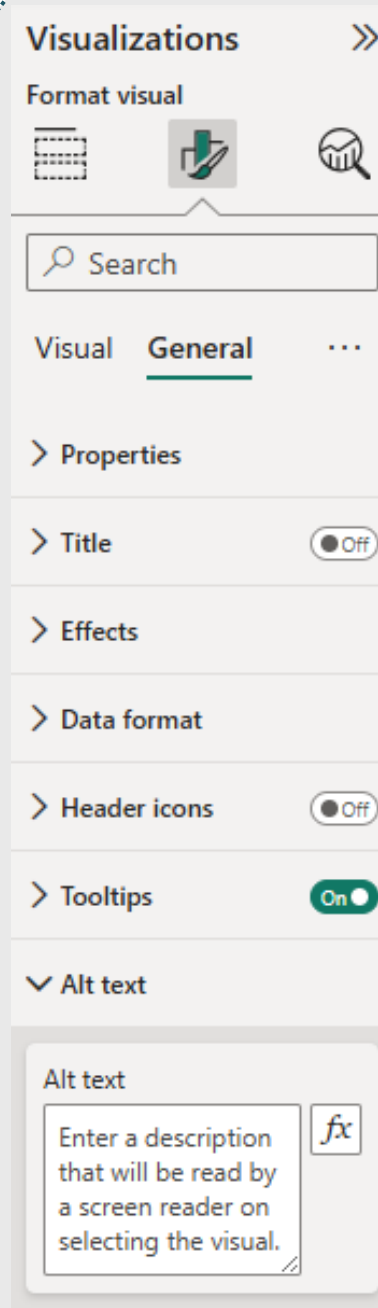
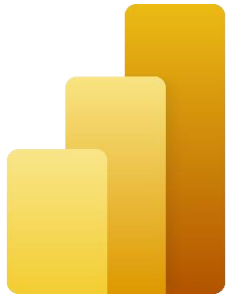


Top Tip: Create template layouts in PowerPoint and save them as a .png file.

You can now use this image and set it as the page background in Power BI to help enforce common standards – create lots of layout options to meet different needs.



Accessibility matters



Alternative text (alt text) is descriptive text which conveys the meaning and context of a visual

Well-written, descriptive alt text dramatically reduces ambiguity and improves user experience

Top Tip: sometimes just the process of writing alt text can help the author decide whether the visual is really telling the story they want it to.

Defining and adjusting the tab order of a report is important for anyone who uses a keyboard to navigate documents.

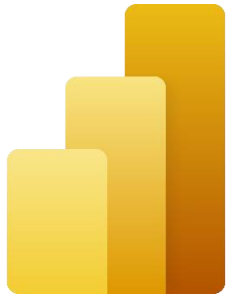
Top Tip: use tab order to think about the narrative flow of a report. Remember many people read in an “F or Z pattern”

Your brand guides may already contain information on accessible font styles and colour palettes.

Top Tip: you can use tools like [colorbrewer2.0](https://colorbrewer2.org/) , or consult resources like “business.scope.org.uk/font-accessibility-and-readability-the-basics” for free help and advice.

Top Tip: Power BI has several accessibility features. You should try them out on your reports and see where to improve

Like and Subscribe



Not everybody wants to log in and click through dashboards – they want answers all in one place ready and waiting.

Top Tip: You can set up automatic subscriptions to email groups of users at a time of your choosing.

Top Tip: You can set up alerts on dashboards so that people are sent a notification if a certain threshold is met.

Example from Sense's monthly KPI reporting

Engagement Strategy KPI Report



Microsoft Power BI <no-reply-powerbi@microsoft.com>
To: Josh Rosekilly



Reply

Reply All

If there are problems with how this message is displayed, click here to view it in a web browser.



ELT Strategy Dashboard - (Performance Overview).png
325 KB

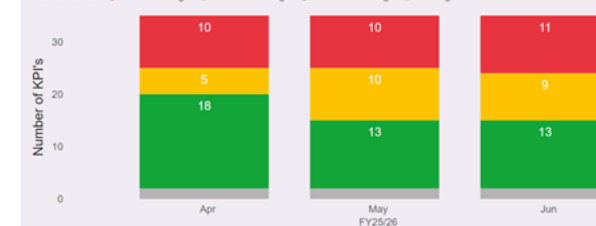
Engagement Strategy KPI Dashboard

The data has been updated in the Engagement Strategy KPI Report. Please let Josh know asap if you have any questions.

[Open report in Power BI >](#)

Performance Overview

Performance: ● <80% of Target ● 80-99% of Target ● >=100% of Target ● No target set

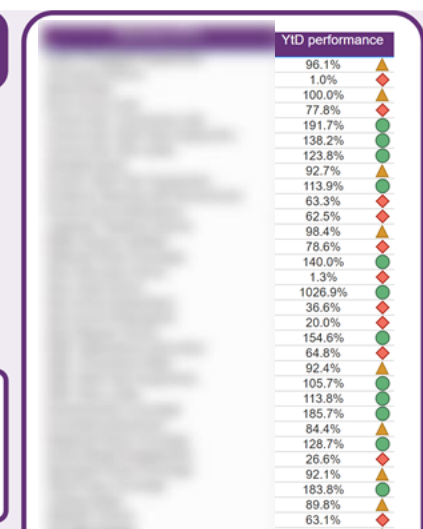


☒ FY21/22 ☐ FY22/23 ☐ FY23/24 ☐ FY24/25 ☒ FY25/26

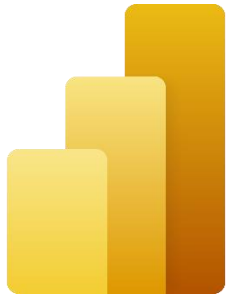
KPI Type: ☐ Reach ☐ Recruitment ☐ Retention

Data Owner:

Data Owner:



Where to find support



Ask the professionals



Build an in-house community



Microsoft Learn



Microsoft | Fabric Community



Follow the Microsoft path

There has never been more long, short, and written form content available for free on social media:



Let's stay connected



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Director

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