Binokula – Report Persistence Filter

ADMIN SUPPORTING DOCUMENTATION for the above feature.

Intention:

Provide a more detailed overview and background for -

1. **Power BI report filter choices with report creation:** Recommending filter options that allow for the Binokula Report Filter Persistence feature to return and apply an expected saved view when using the Binokula application.
2. **User experience in Binokula:** Show users the filtering options available on the visualised report and highlight where the Report Filter Persistence feature works in practice and meets the expected needs of the user.

Binokula feature way-of-working:

Figure 1:The Binokula Menu Bar featuring the Filter Persistence icons

1. Filter the report using manual filters and slicers to get the report view you need
2. Click the **SAVE** button on the Binokula Menu Bar
3. The user is now able to change views on the report tab, view other report tabs, press **RESET** to go back to an unfiltered view of the report, and/or sign-out of the Binokula application.
4. On return to the report tab, the user may now press **APPLY** and restore the saved view. APPLY will continue to work until a new view is saved (overwritten). Recalling the saved view applies even after users log out and later return to the same tab.

Figure 2: Filter Persistence Icons

Power BI report filters that may be persisted:

Report Persistence utilises the **original Power BI filter types** that have been used during the creation of dashboards in the Power BI, which are valid for saving and reapplying the same view when returning to the report after amending, resetting and/or returning to a report tab in a future session.

These include:

1. **Manual Filters**
   - Filters on this visual
   - Filters on this page
   - Filters on all pages
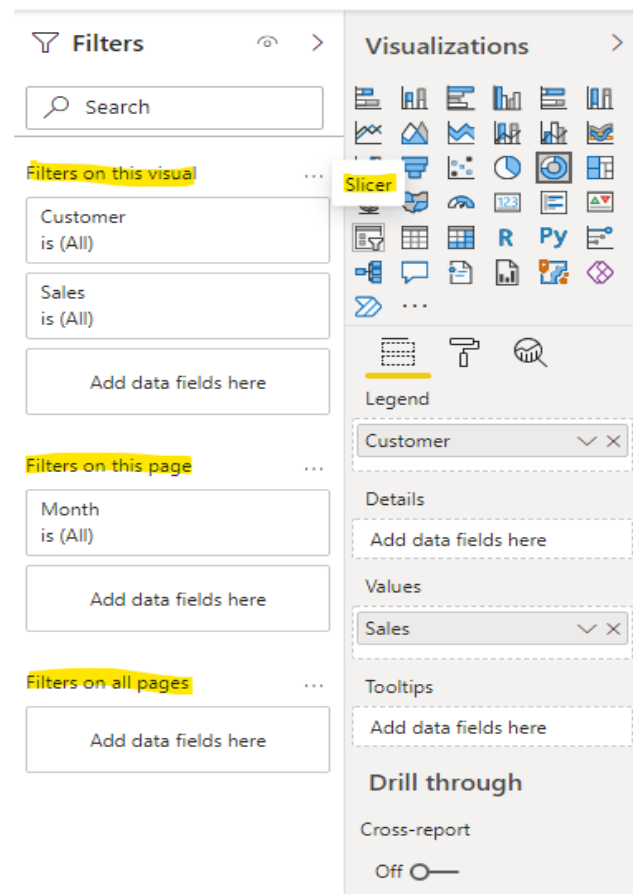2. **Slicers**

Figure 3: View of Power BI report filter types, selectable whilst in the Power BI report creation on Power BI desktop.

More about using Slicers

An alternative way of filtering a report that narrows the portion of the dataset that is shown in the report visualisations.

Figure 4: Slicer example where data that is visualised can be filtered to selected year only.

1.　　**When to use a slicer**

Slicers are a great choice when you want to:

- Display commonly used or important filters on the report canvas for easier access.
- Make it easier to see the current filtered state without having to open a drop-down list.
- Filter by columns that are unneeded and hidden in the data tables.
- Create more focused reports by putting slicers next to important visuals.

2.　　**Power BI slicers don't support:**

- Input field
- Drill-down options

Further reading about Slicers:

The following reference outlines more slicer examples along with supporting information on creating Power BI reports with suitable slicers that can be filtered by your audience: https://docs.microsoft.com/en-us/power-bi/visuals/power-bi-visualization-slicers?tabs=powerbi-desktop

What is unable to be "filtered" or saved:

An interactive dashboard allows the user to dive deeper into content for them. This method of "filtering" to a view they want to see is not able to be saved and retrieved as a later session. This method does not relate back to a manual filter or slicer setting in the Power BI workspace version of the report or dashboard. See more: https://docs.microsoft.com/en-us/power-bi/create-reports/power-bi-reports-filters-and-highlighting

It is recommended that drilling down into the data by clicking on the graphics of the dashboard be saved at the time via the **Binokula feature Snapshot to PDF**.
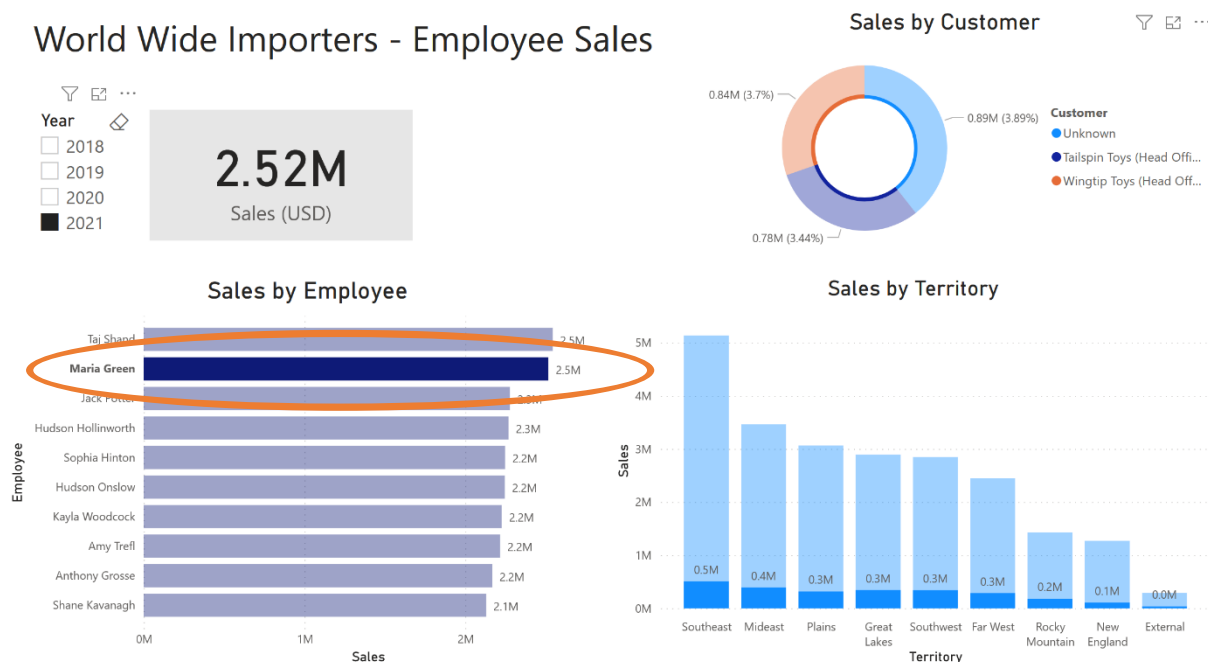

Figure 5: Clicking directly on the interactive content is not a retrievable filter option.

ADDITIONAL REFERENCES:

Add a filter to a report in Power BI

Format filters in Power BI reports

Types of filters in Power BI reports

END