BUZ to Power BI

Power BI

Power BI

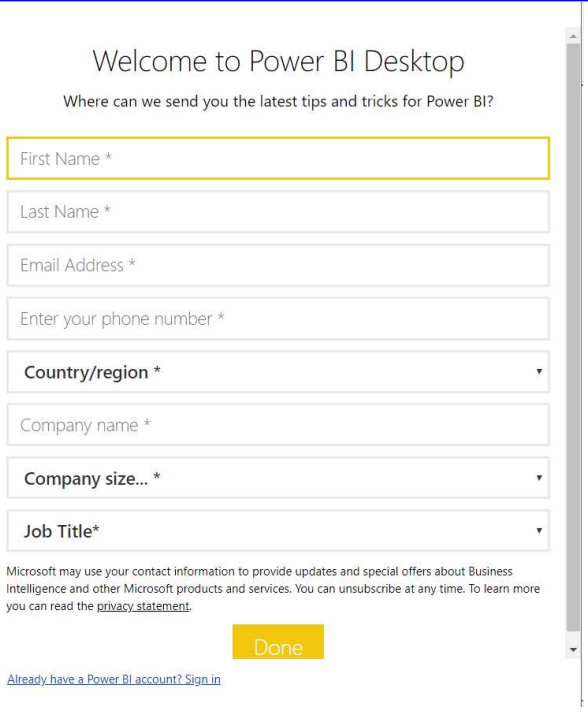
Power Bi is a powerful suite of business analytical tools for data visualisation. Giving you the ability to monitor your business through interactive visual reporting.

This can be used by downloading the program for windows
https://powerbi.microsoft.com/en-us/downloads/

Mac users can use Power Bi via an online dashboard. This dashboard must be created by a windows user first.

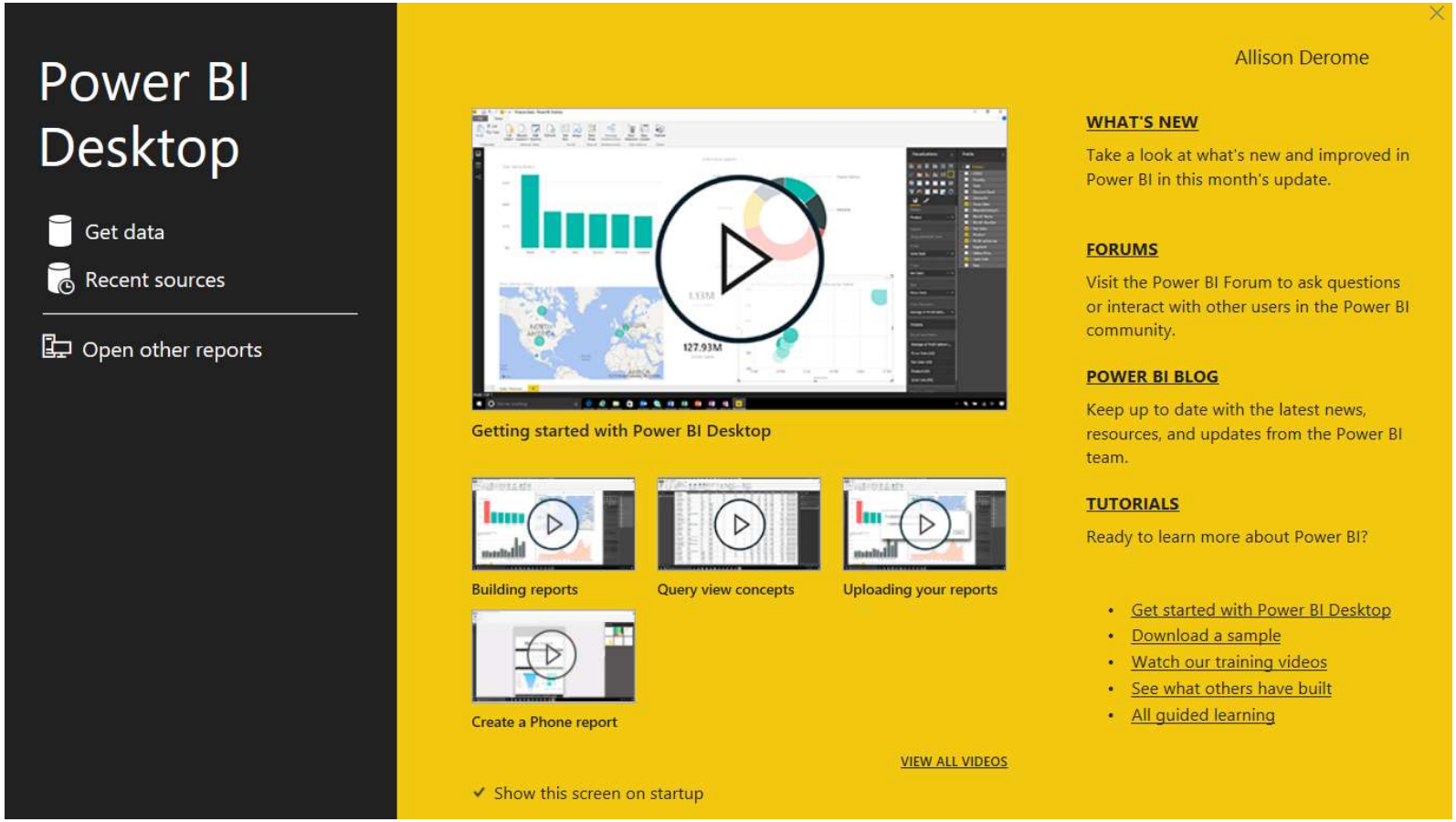
Refer to
https://buzsoftware.atlassian.net/wiki/spaces/HELP/pages/52658194/Power+BI+Reporting
for further set up details.

The first time you run Power Bi create a sign in. Or sign in if you already have set up



Power BI

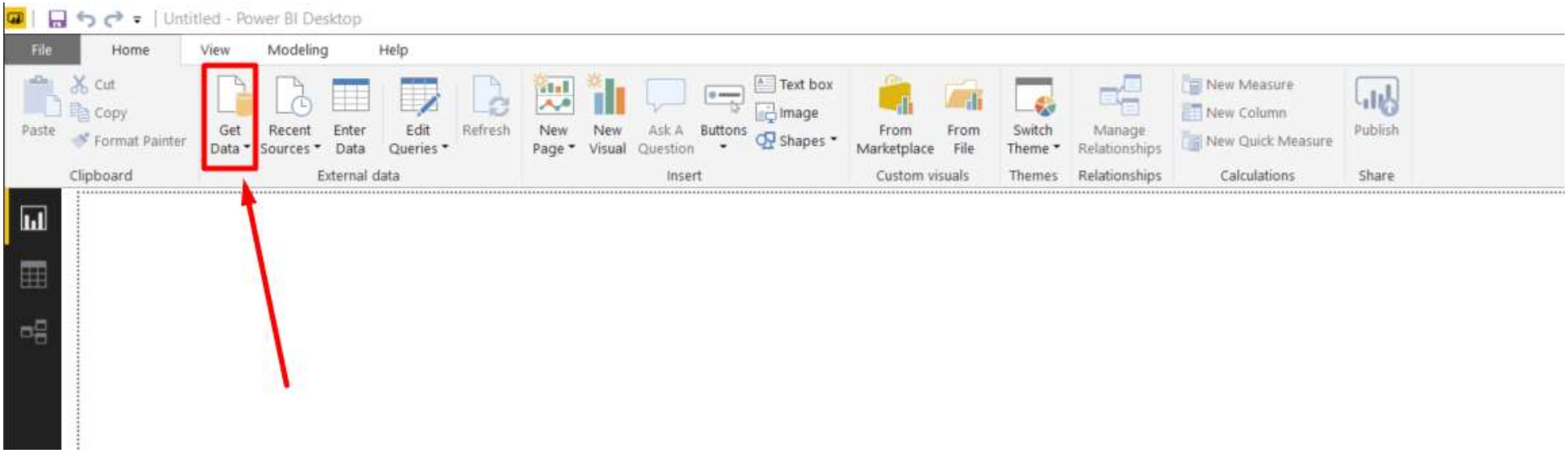
When you run Power BI Desktop, a *Welcome* screen is displayed.
Go to -> Get Data



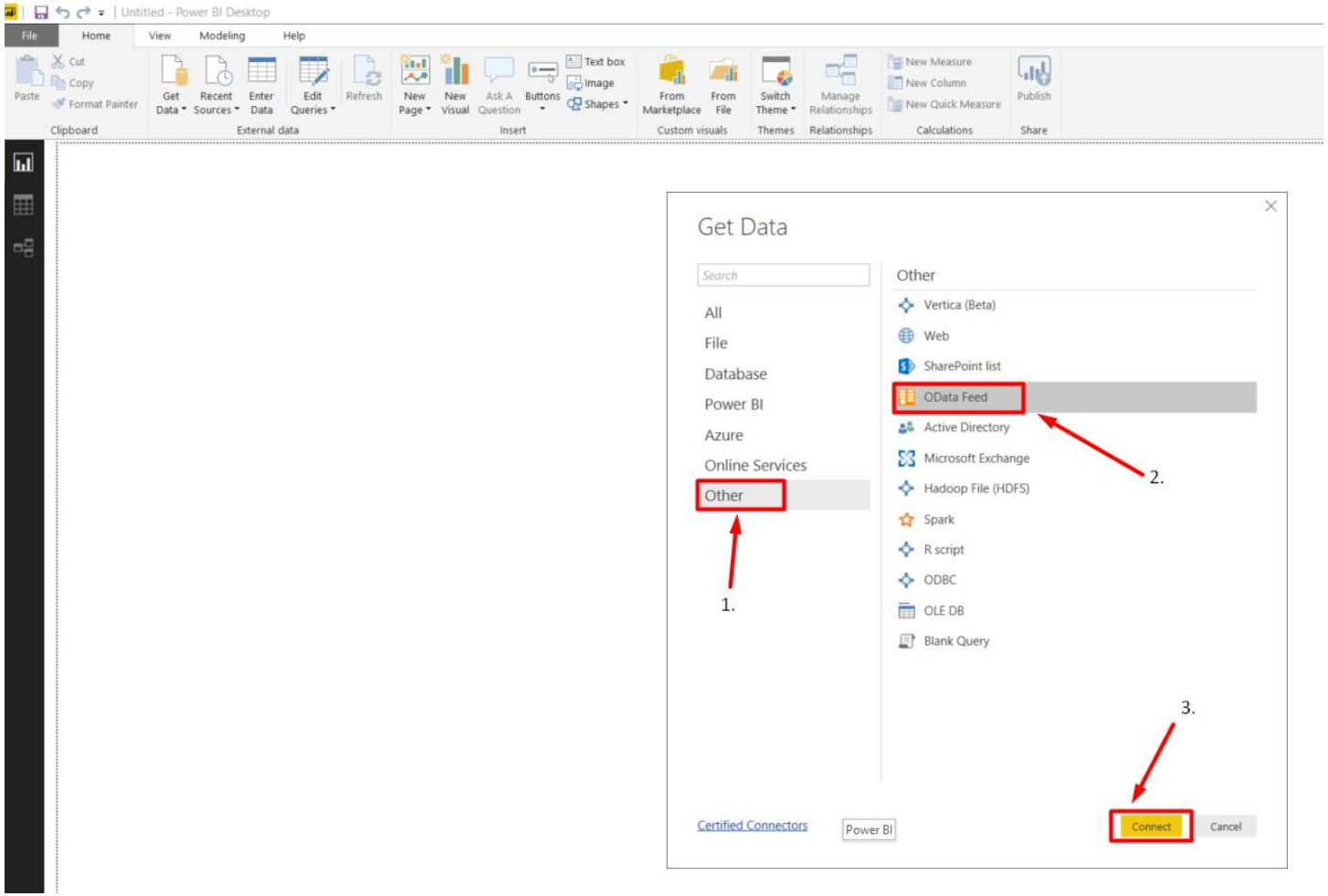
NOTE! Before you can start using Power BI you need your Organizational Code this can be found in BUZ under Reports -> Right hand side (5 Character code) or contact BUZ Support to help supply your Organizational Code.

Power BI

Step 1. Open the required data source -> go to -> Get Data



Power BI

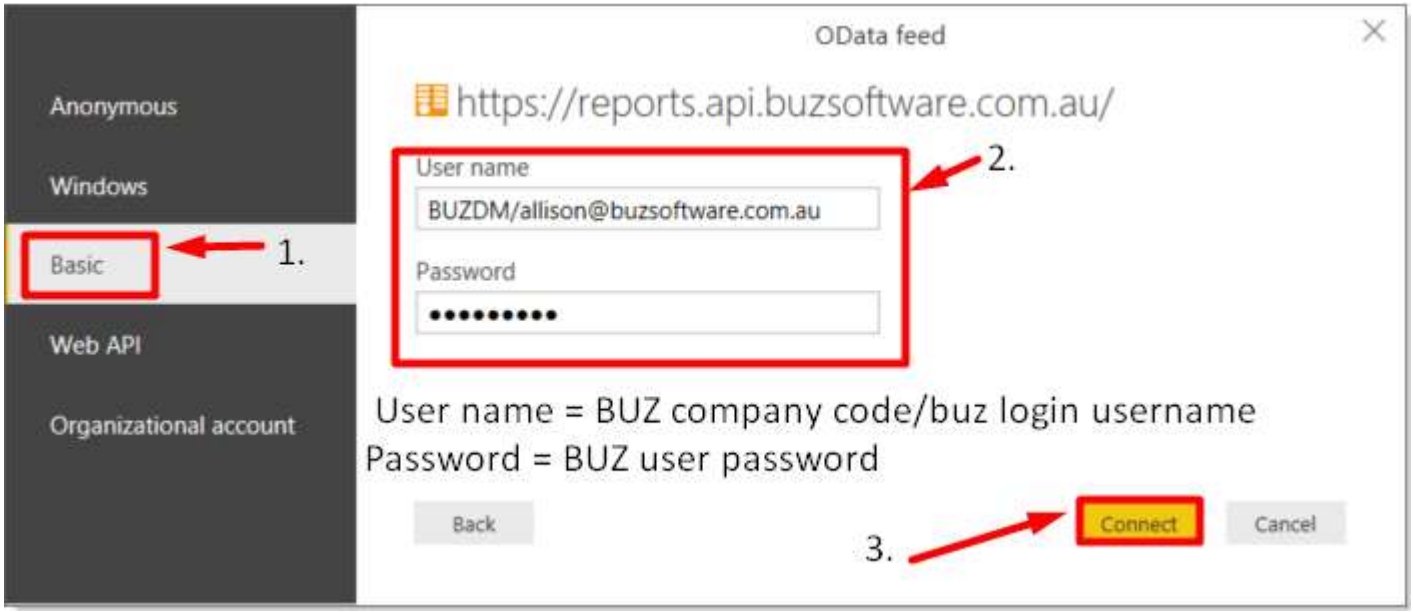


Step 2 : Open the OData Feed-> Select Other -> OData Feed -> Connect

Power BI

Step 3: Enter the following URL to connect to the database https://reports.api.buzsoftware.com.au

Step 4:
Enter your credential's



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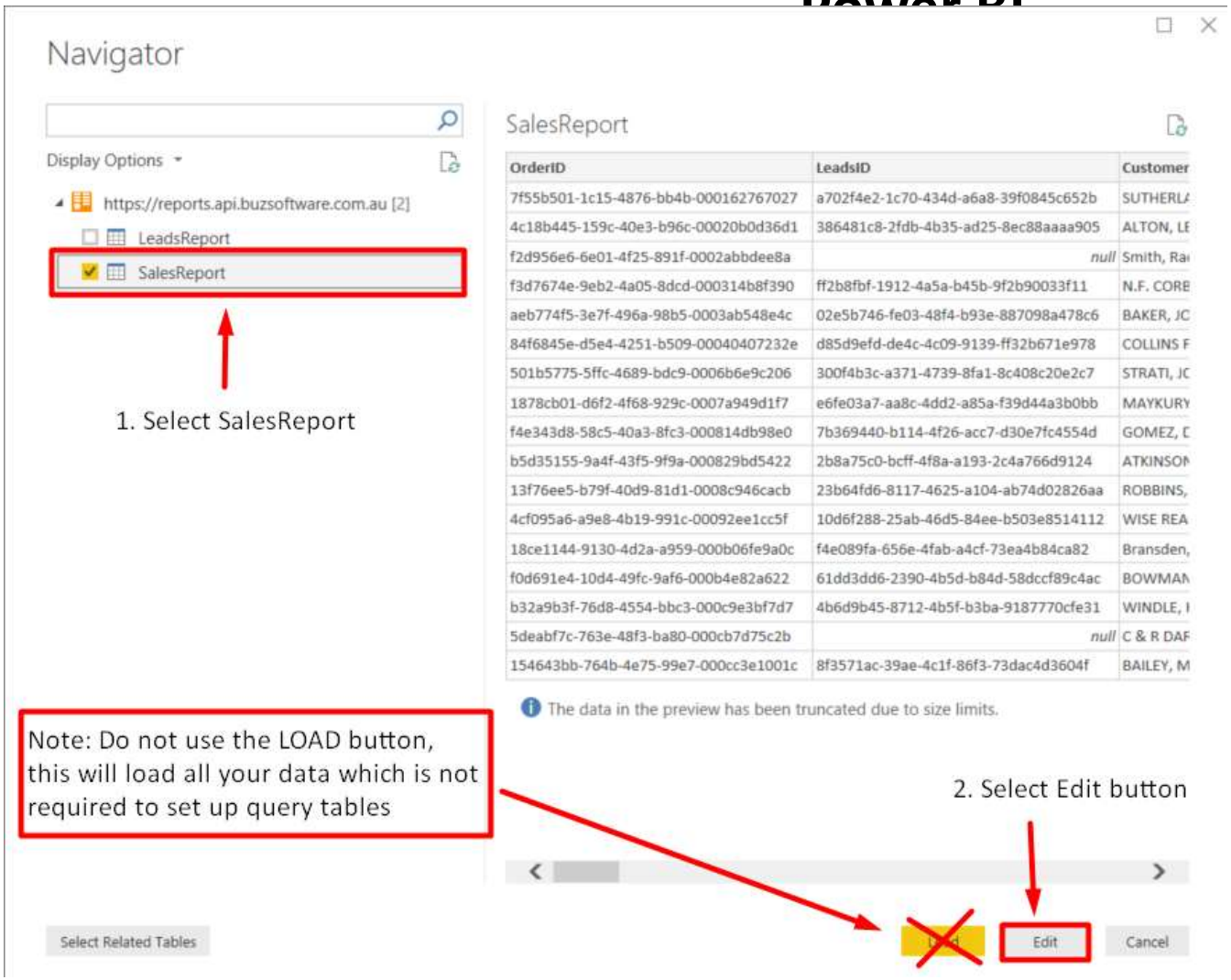

Step 5: Mark SalesReport ->Select the edit button -> The required query data will load.

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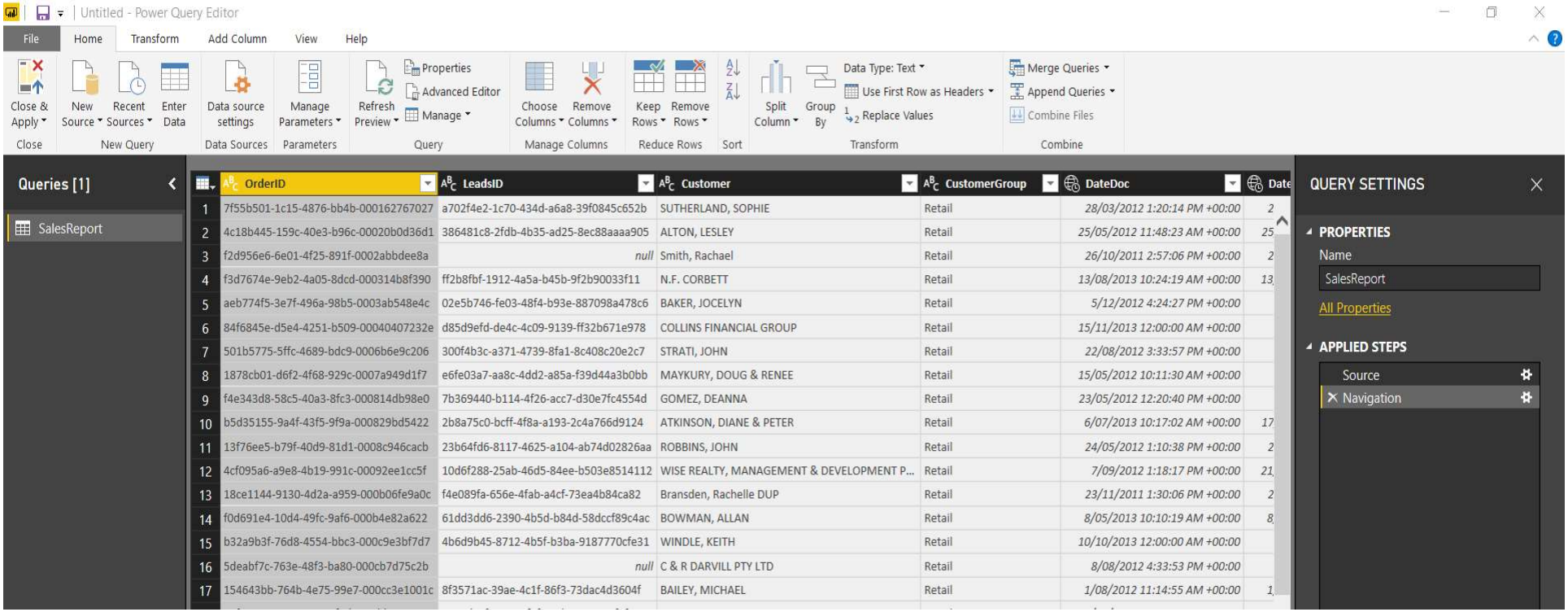
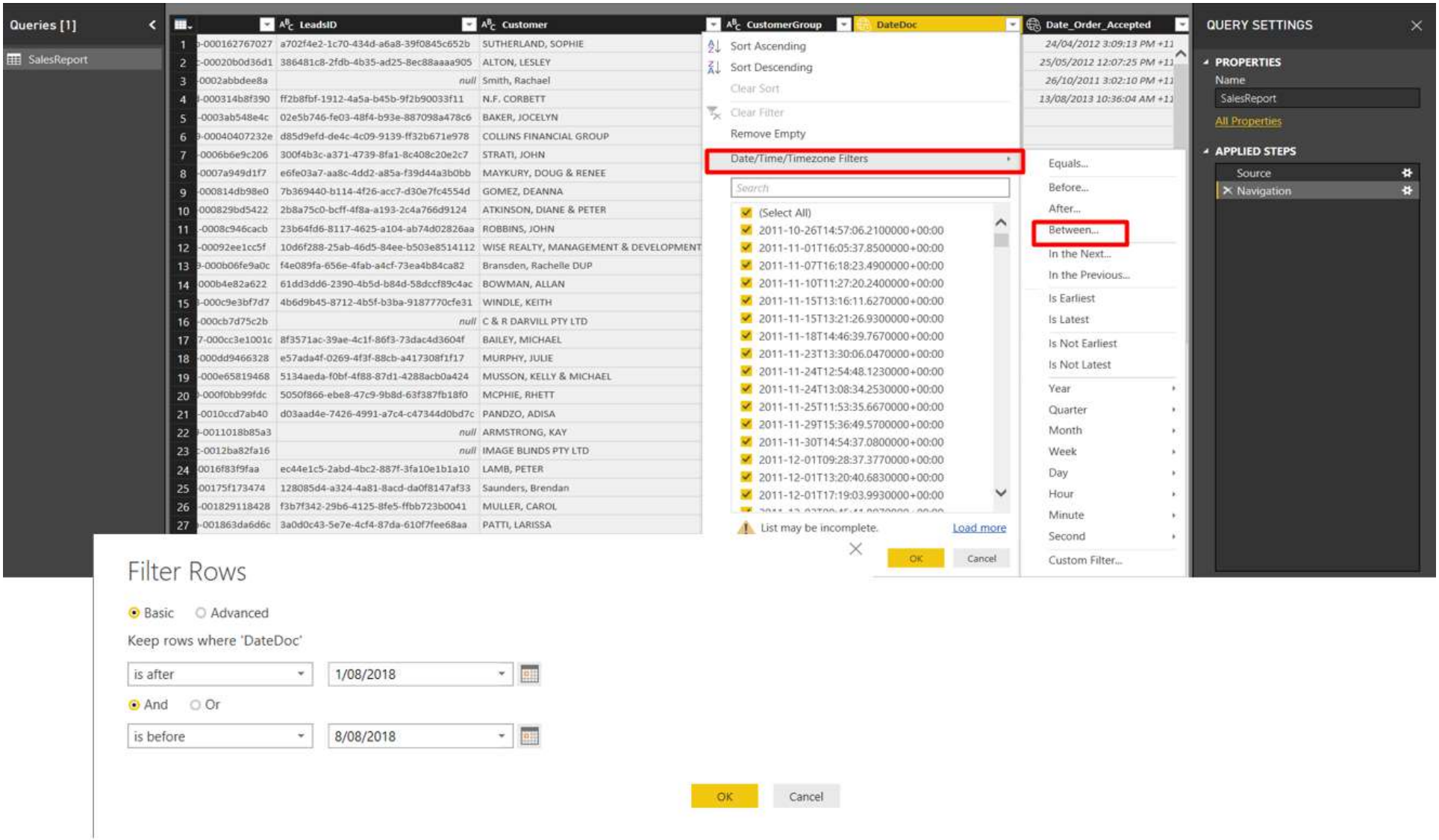
The data query editor table will open, here you can select and filter what data to show in the Power Bi report. Columns can be selected or deleted.



	OrderID	LeadsID	Customer	CustomerGroup	DateDoc	Date
1	7f55b501-1c15-4876-bb4b-000162767027	a702f4e2-1c70-434d-a6a8-39f0845c652b	SUTHERLAND, SOPHIE	Retail	28/03/2012 1:20:14 PM +00:00	2
2	4c18b445-159c-40e3-b96c-00020b0d36d1	386481c8-2fdb-4b35-ad25-8ec88aaaa905	ALTON, LESLEY	Retail	25/05/2012 11:48:23 AM +00:00	25
3	f2d956e6-6e01-4f25-891f-0002abbdee8a	null	Smith, Rachael	Retail	26/10/2011 2:57:06 PM +00:00	2
4	f3d7674e-9eb2-4a05-8dcd-000314b8f390	ff2b8fbf-1912-4a5a-b45b-9f2b90033f11	N.F. CORBETT	Retail	13/08/2013 10:24:19 AM +00:00	13
5	aeb774f5-3e7f-496a-98b5-0003ab548e4c	02e5b746-fe03-48f4-b93e-887098a478c6	BAKER, JOCELYN	Retail	5/12/2012 4:24:27 PM +00:00	
6	84f6845e-d5e4-4251-b509-00040407232e	d85d9efd-de4c-4c09-9139-ff32b671e978	COLLINS FINANCIAL GROUP	Retail	15/11/2013 12:00:00 AM +00:00	
7	501b5775-5ffc-4689-bdc9-0006b6e9c206	300f4b3c-a371-4739-8fa1-8c408c20e2c7	STRATI, JOHN	Retail	22/08/2012 3:33:57 PM +00:00	
8	1878cb01-d6f2-4f68-929c-0007a949d1f7	e6fe03a7-aa8c-4dd2-a85a-f39d44a3b0bb	MAYKURY, DOUG & RENEE	Retail	15/05/2012 10:11:30 AM +00:00	
9	f4e343d8-58c5-40a3-8fc3-000814db98e0	7b369440-b114-4f26-acc7-d30e7fc4554d	GOMEZ, DEANNA	Retail	23/05/2012 12:20:40 PM +00:00	
10	b5d35155-9a4f-43f5-9f9a-000829bd5422	2b8a75c0-bcff-4f8a-a193-2c4a766d9124	ATKINSON, DIANE & PETER	Retail	6/07/2013 10:17:02 AM +00:00	17
11	13f76ee5-b79f-40d9-81d1-0008c946cacb	23b64fd6-8117-4625-a104-ab74d02826aa	ROBBINS, JOHN	Retail	24/05/2012 1:10:38 PM +00:00	2
12	4cf095a6-a9e8-4b19-991c-00092ee1cc5f	10d6f288-25ab-46d5-84ee-b503e8514112	WISE REALTY, MANAGEMENT & DEVELOPMENT P...	Retail	7/09/2012 1:18:17 PM +00:00	21
13	18ce1144-9130-4d2a-a959-000b06fe9a0c	f4e089fa-656e-4fab-a4cf-73ea4b84ca82	Bransden, Rachelle DUP	Retail	23/11/2011 1:30:06 PM +00:00	2
14	f0d691e4-10d4-49fc-9af6-000b4e82a622	61dd3dd6-2390-4b5d-b84d-58dccf89c4ac	BOWMAN, ALLAN	Retail	8/05/2013 10:10:19 AM +00:00	8
15	b32a9b3f-76d8-4554-bbc3-000c9e3bf7d7	4b6d9b45-8712-4b5f-b3ba-9187770cfe31	WINDLE, KEITH	Retail	10/10/2013 12:00:00 AM +00:00	
16	5deabf7c-763e-48f3-ba80-000cb7d75c2b	null	C & R DARVILL PTY LTD	Retail	8/08/2012 4:33:53 PM +00:00	
17	154643bb-764b-4e75-99e7-000cc3e1001c	8f3571ac-39ae-4c1f-86f3-73dac4d3604f	BAILEY, MICHAEL	Retail	1/08/2012 11:14:55 AM +00:00	1

Power BI

Example of Filtering Date/Time combination



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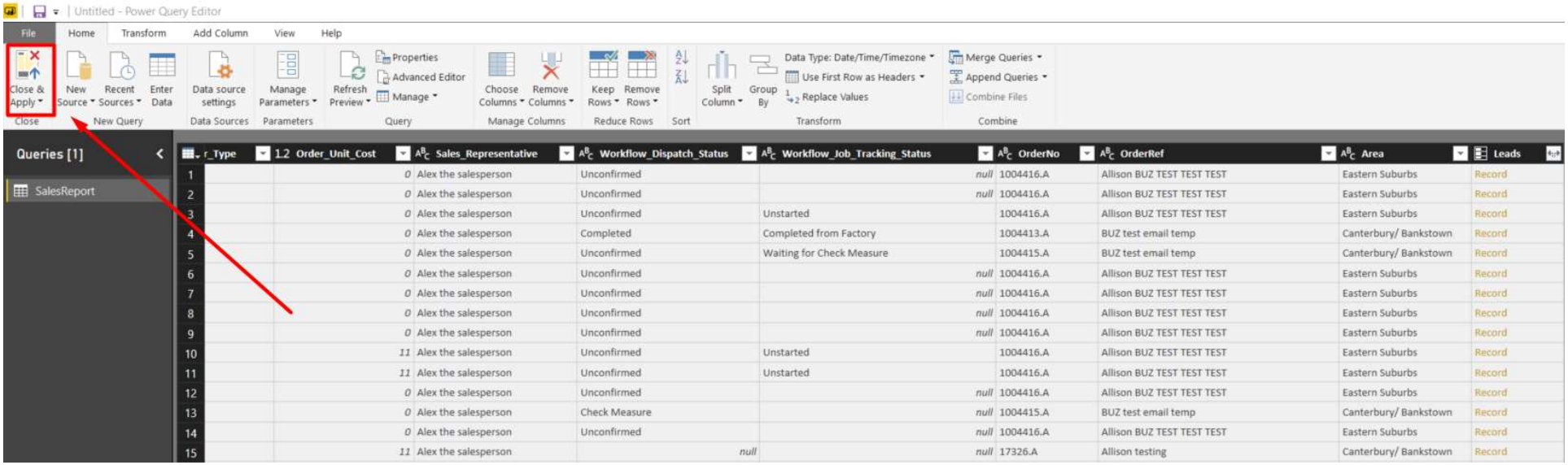
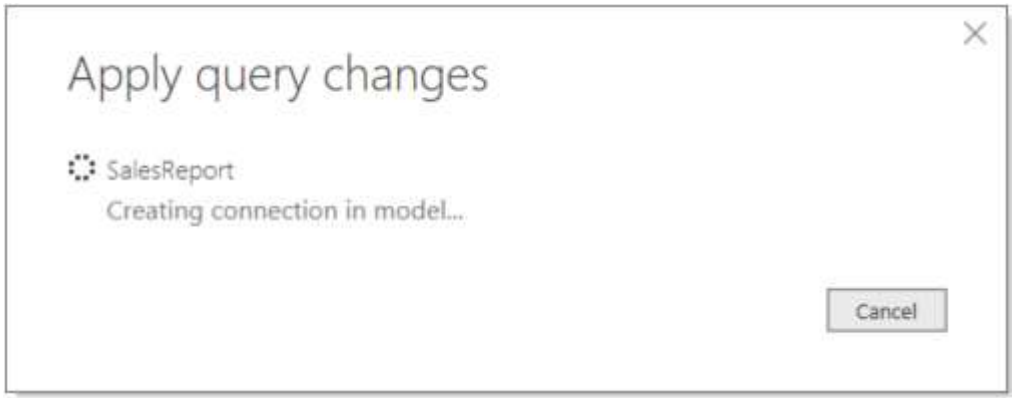
Once you are happy with the selected query editor data -> Close & Apply



	r_Type	Order_Unit_Cost	Sales_Representative	Workflow_Dispatch_Status	Workflow_Job_Tracking_Status	OrderNo	OrderRef	Area	Leads
1		0	Alex the salesperson	Unconfirmed	null	1004416.A	Allison BUZ TEST TEST TEST	Eastern Suburbs	Record
2		0	Alex the salesperson	Unconfirmed	null	1004416.A	Allison BUZ TEST TEST TEST	Eastern Suburbs	Record
3		0	Alex the salesperson	Unconfirmed	Unstarted	1004416.A	Allison BUZ TEST TEST TEST	Eastern Suburbs	Record
4		0	Alex the salesperson	Completed	Completed from Factory	1004413.A	BUZ test email temp	Canterbury/ Bankstown	Record
5		0	Alex the salesperson	Unconfirmed	Waiting for Check Measure	1004415.A	BUZ test email temp	Canterbury/ Bankstown	Record
6		0	Alex the salesperson	Unconfirmed	null	1004416.A	Allison BUZ TEST TEST TEST	Eastern Suburbs	Record
7		0	Alex the salesperson	Unconfirmed	null	1004416.A	Allison BUZ TEST TEST TEST	Eastern Suburbs	Record
8		0	Alex the salesperson	Unconfirmed	null	1004416.A	Allison BUZ TEST TEST TEST	Eastern Suburbs	Record
9		0	Alex the salesperson	Unconfirmed	null	1004416.A	Allison BUZ TEST TEST TEST	Eastern Suburbs	Record
10		11	Alex the salesperson	Unconfirmed	Unstarted	1004416.A	Allison BUZ TEST TEST TEST	Eastern Suburbs	Record
11		11	Alex the salesperson	Unconfirmed	Unstarted	1004416.A	Allison BUZ TEST TEST TEST	Eastern Suburbs	Record
12		0	Alex the salesperson	Unconfirmed	null	1004416.A	Allison BUZ TEST TEST TEST	Eastern Suburbs	Record
13		0	Alex the salesperson	Check Measure	null	1004415.A	BUZ test email temp	Canterbury/ Bankstown	Record
14		0	Alex the salesperson	Unconfirmed	null	1004416.A	Allison BUZ TEST TEST TEST	Eastern Suburbs	Record
15		11	Alex the salesperson	null	null	17326.A	Allison testing	Canterbury/ Bankstown	Record

The following screen may appear when loading the data



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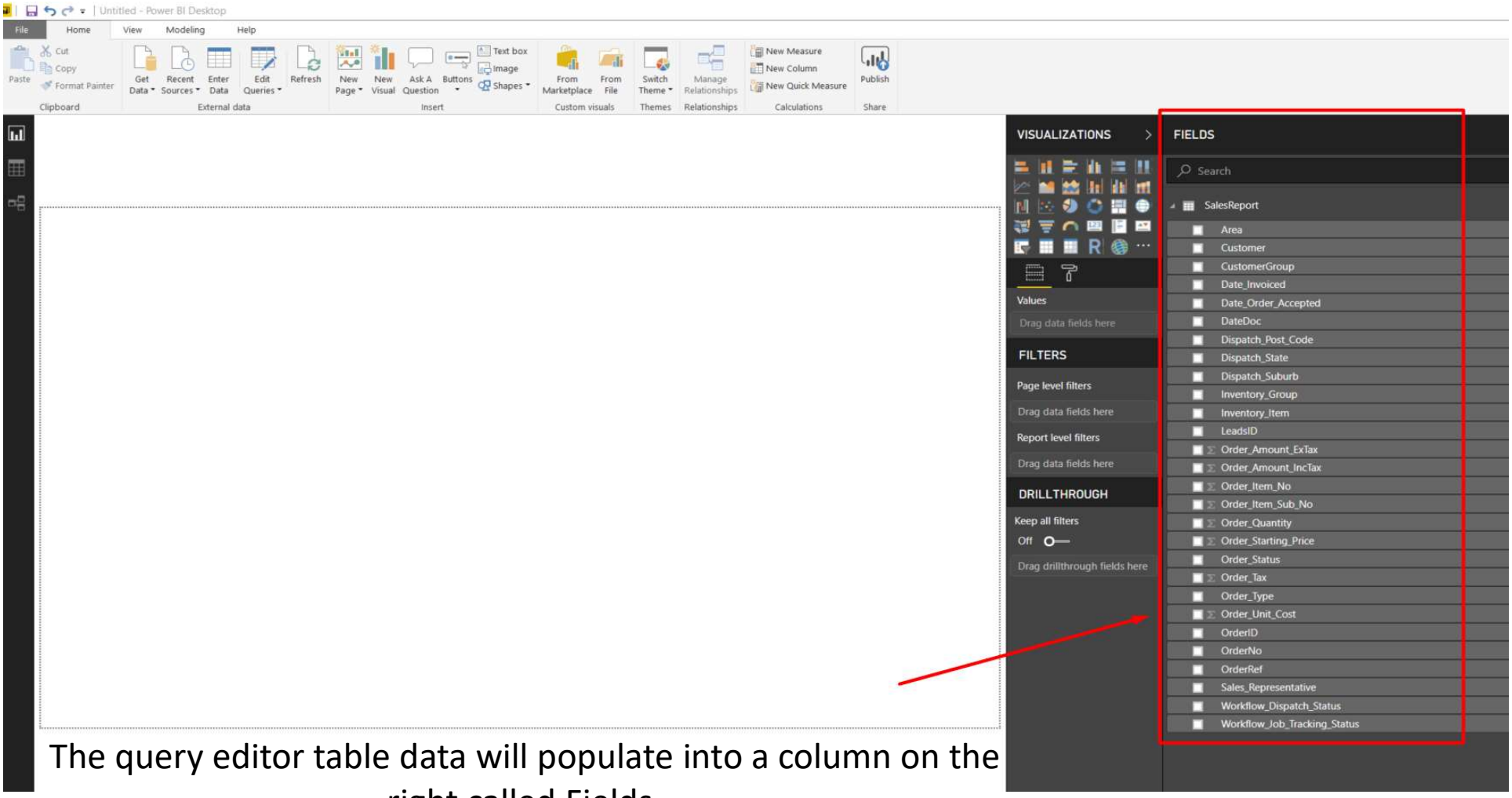
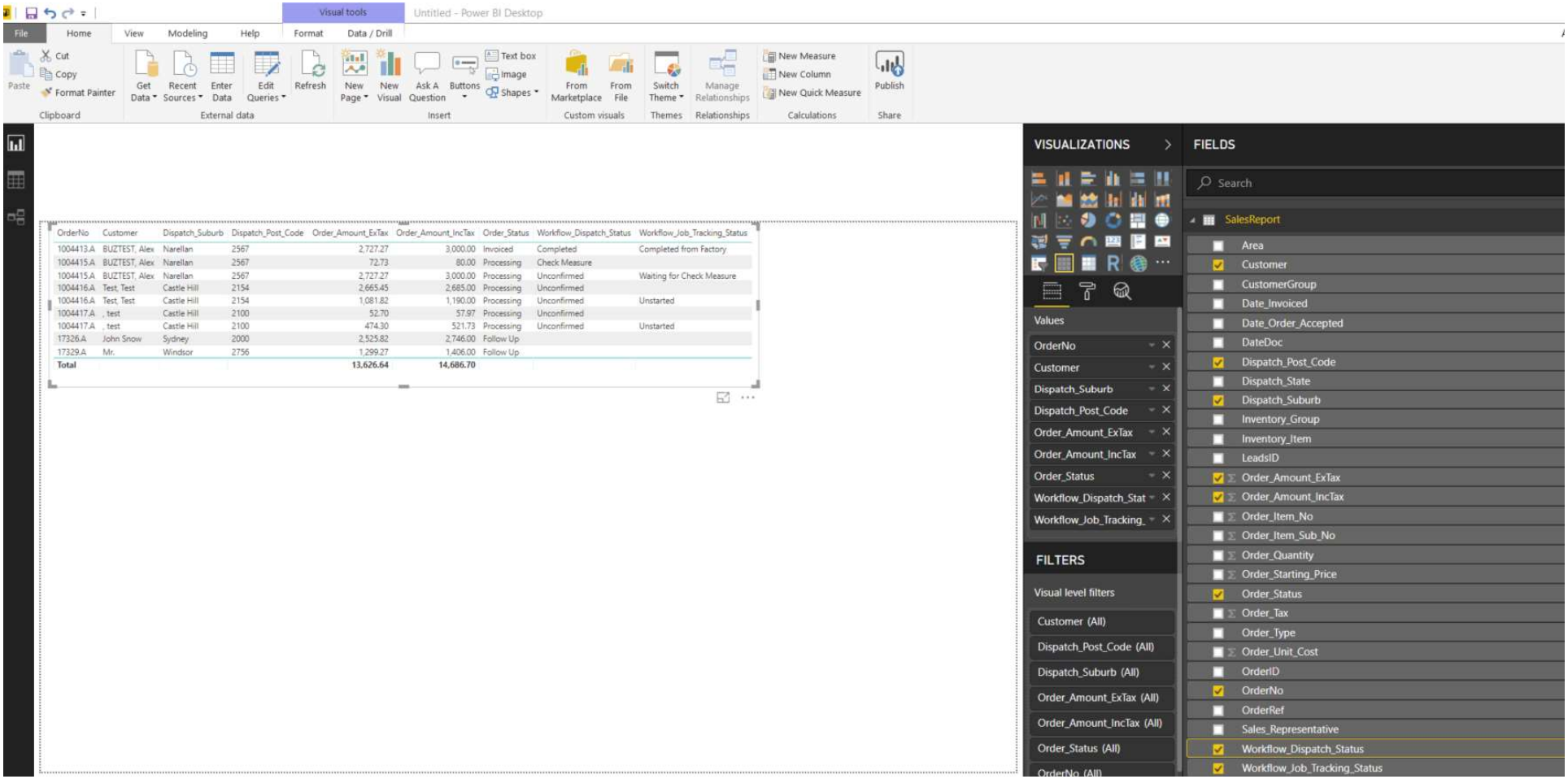


The query editor table data will populate into a column on the right called Fields.

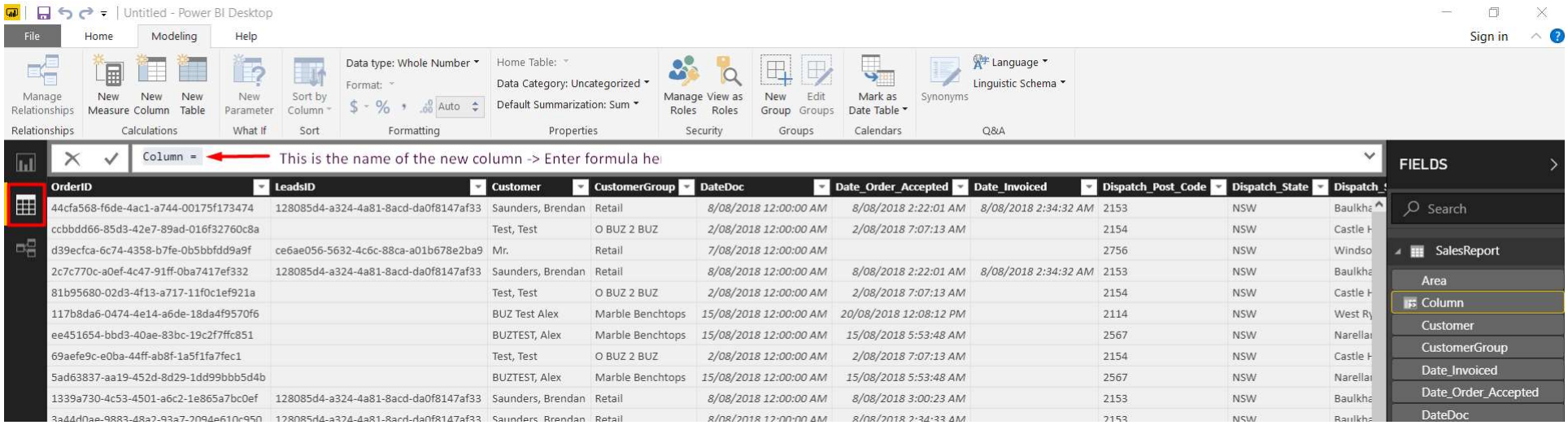
Select what column data you would like to appear in the report.

Power BI

The following Power Bi report was created by selecting/dragging the following fields : OrderNo -> Customer -> Dispatch_Suburb -> Dispatch_Post_Code -> Order_Amount_ExTax -> Order_Amount_IncTax -> Workflow_Dispatch_Status ->Workflow_Job_Tracking_Status ->Order_status



Power BI

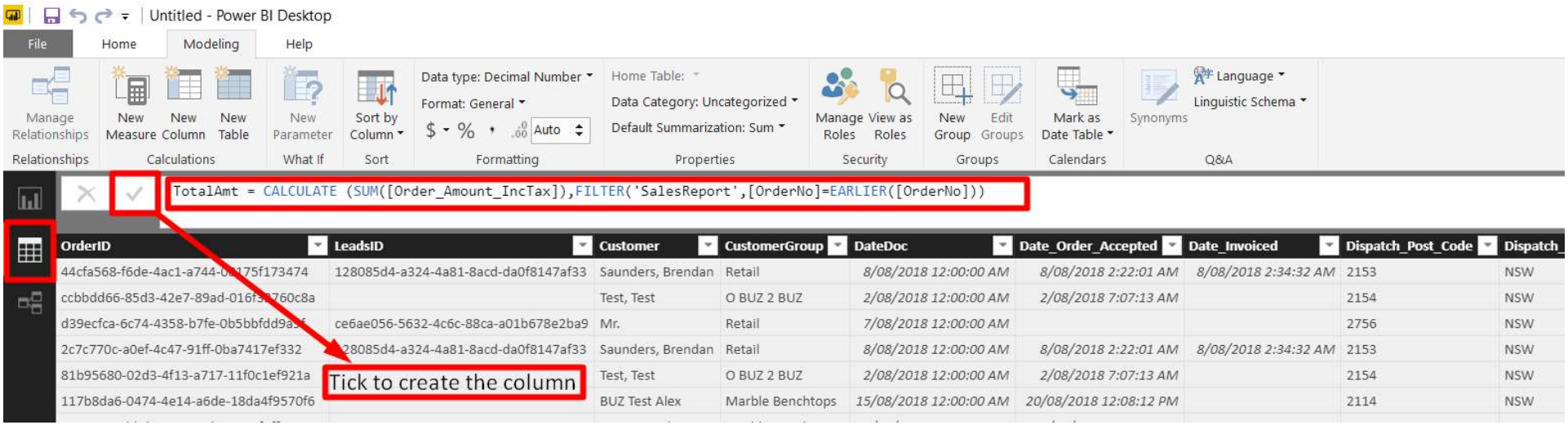


OrderID	LeadsID	Customer	CustomerGroup	DateDoc	Date_Order_Accepted	Date_Invoiced	Dispatch_Post_Code	Dispatch_State	Dispatch_
44cfa568-f6de-4ac1-a744-00175f173474	128085d4-a324-4a81-8acd-da0f8147af33	Saunders, Brendan	Retail	8/08/2018 12:00:00 AM	8/08/2018 2:22:01 AM	8/08/2018 2:34:32 AM	2153	NSW	Baulkha
ccbbdd66-85d3-42e7-89ad-016f32760c8a		Test, Test	O BUZ 2 BUZ	2/08/2018 12:00:00 AM	2/08/2018 7:07:13 AM		2154	NSW	Castle H
d39ecfca-6c74-4358-b7fe-0b5bbfdd9a9f	ce6ae056-5632-4c6c-88ca-a01b678e2ba9	Mr.	Retail	7/08/2018 12:00:00 AM			2756	NSW	Windso
2c7c770c-a0ef-4c47-91ff-0ba7417ef332	128085d4-a324-4a81-8acd-da0f8147af33	Saunders, Brendan	Retail	8/08/2018 12:00:00 AM	8/08/2018 2:22:01 AM	8/08/2018 2:34:32 AM	2153	NSW	Baulkha
81b95680-02d3-4f13-a717-11f0c1ef921a		Test, Test	O BUZ 2 BUZ	2/08/2018 12:00:00 AM	2/08/2018 7:07:13 AM		2154	NSW	Castle H
117b8da6-0474-4e14-a6de-18da4f9570f6		BUZ Test Alex	Marble Benchtops	15/08/2018 12:00:00 AM	20/08/2018 12:08:12 PM		2114	NSW	West Ry
ee451654-bbd3-40ae-83bc-19c2f7ffc851		BUZTEST, Alex	Marble Benchtops	15/08/2018 12:00:00 AM	15/08/2018 5:53:48 AM		2567	NSW	Narellan
69aefe9c-e0ba-44ff-ab8f-1a5f1fa7fec1		Test, Test	O BUZ 2 BUZ	2/08/2018 12:00:00 AM	2/08/2018 7:07:13 AM		2154	NSW	Castle H
5ad63837-aa19-452d-8d29-1dd99bbb5d4b		BUZTEST, Alex	Marble Benchtops	15/08/2018 12:00:00 AM	15/08/2018 5:53:48 AM		2567	NSW	Narellan
1339a730-4c53-4501-a6c2-1e865a7bc0ef	128085d4-a324-4a81-8acd-da0f8147af33	Saunders, Brendan	Retail	8/08/2018 12:00:00 AM	8/08/2018 3:00:23 AM		2153	NSW	Baulkha
3a44d0ae-9883-48a2-93a7-2094e610c950	128085d4-a324-4a81-8acd-da0f8147af33	Saunders, Brendan	Retail	8/08/2018 12:00:00 AM	8/08/2018 2:34:33 AM		2153	NSW	Baulkha

For more specific reporting extra columns can be added to combine existing column data with formulas -> Modeling ->New Column -> Enter the parameters/formulas required.

Further Help can be found at
https://docs.microsoft.com/en-us/power-bi/desktop-quickstart-learn-dax-basics

Power BI



The meaning of the formula:

TotalAmt = CALCULATE(SUM([Order_Amount_IncTax]),FILTER('SalesReport',[OrderNo]=EARLIER([OrderNo])))

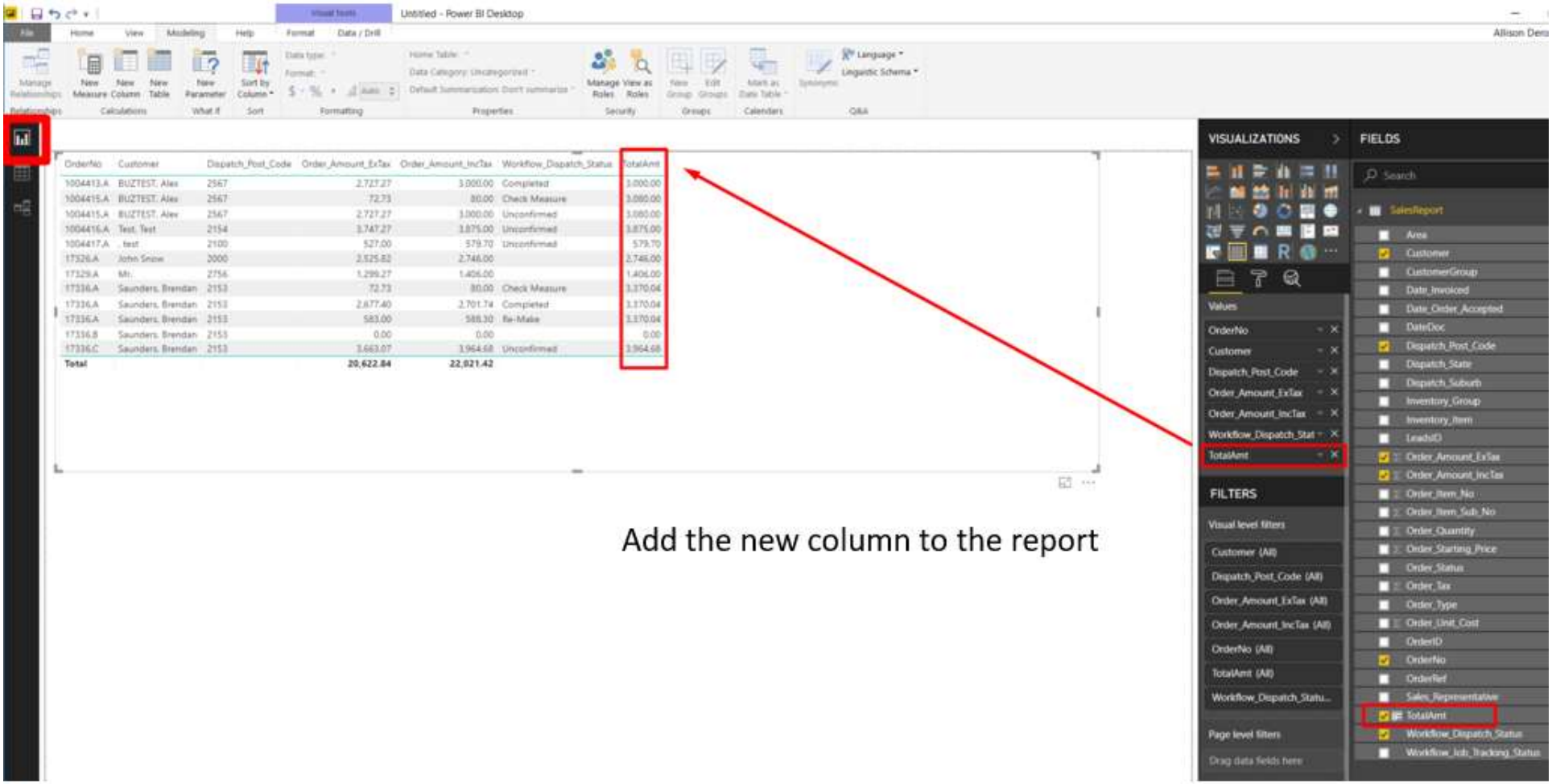
TotalAMT = new column name

CALCULATE = define a column's values, anything from putting together text values from a couple of different columns to calculating a numeric value from other values

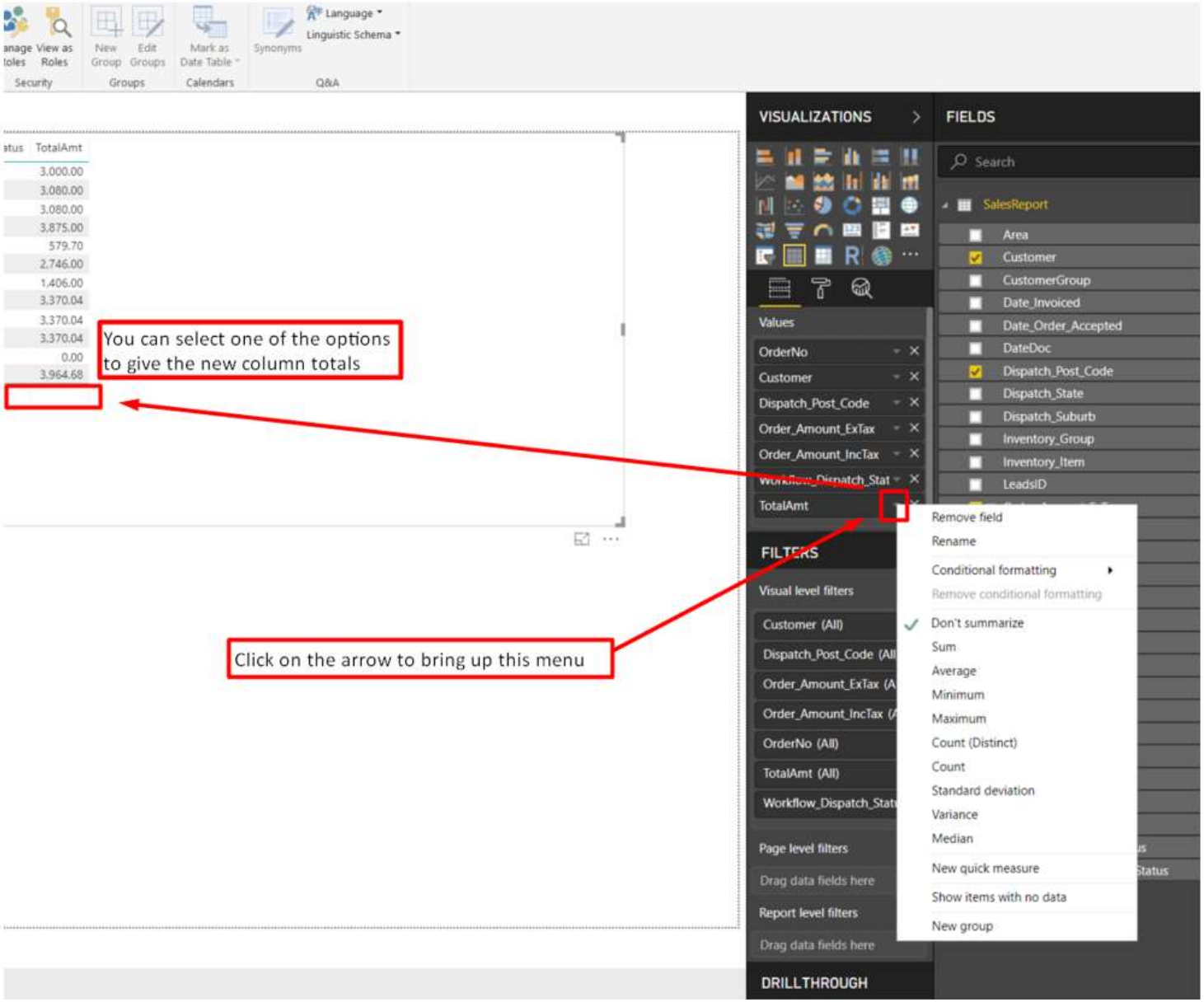
SUM([Order_Amount_IncTax])= a sum of the numeric data from the Order_Amount_IncTax column

FILTER('SalesReport',[OrderNo]=EARLIER([OrderNo])) = used to refer to the table and order no data you want to filter, (SalesReport table), EARLIER which already has the same order number.

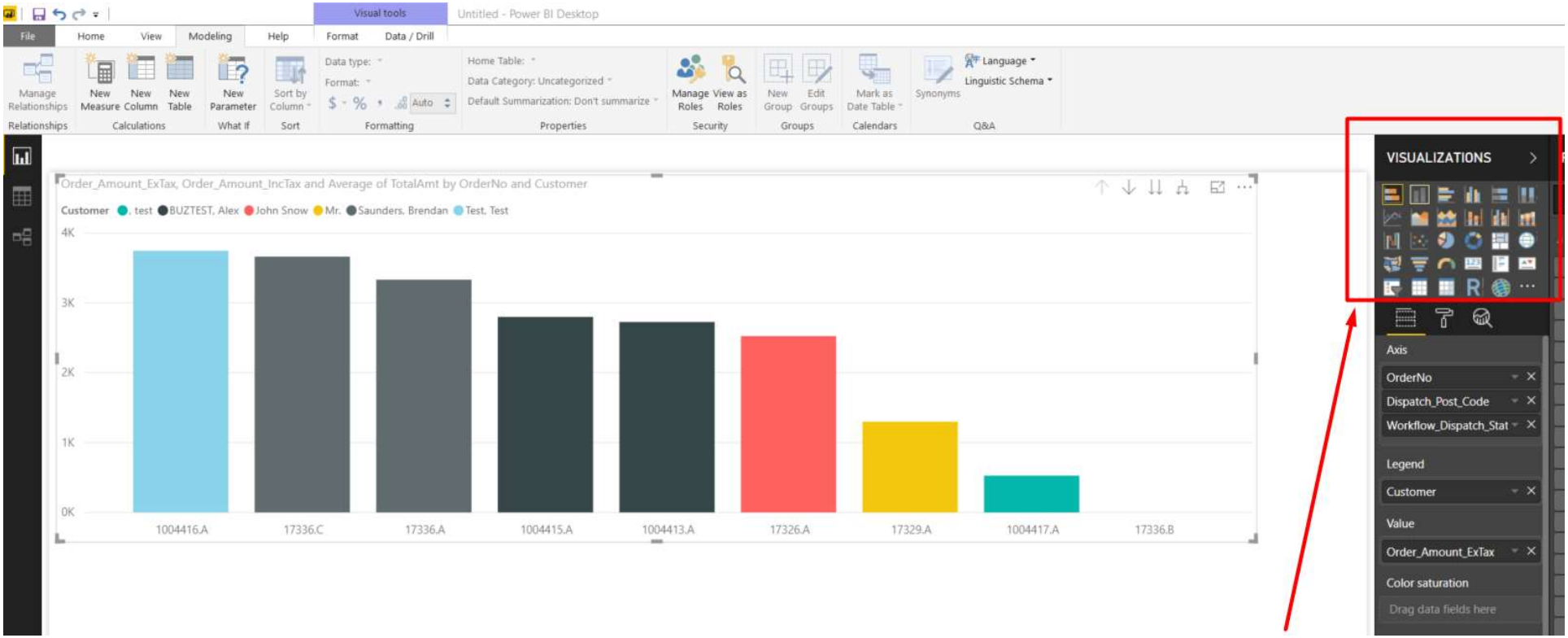
Power BI


Untitled - Power BI Desktop
VISUALIZATIONS
FIELDS
FILTERS
Add the new column to the report

Power BI


Security
Groups
Calendars
Q&A
Language
Linguistic Schema
Synonyms
New Group
Edit Groups
Mark as Date Table
View as Roles
atus TotalAmt
3,000.00
3,080.00
3,080.00
3,875.00
579.70
2,746.00
1,406.00
3,370.04
3,370.04
3,370.04
0.00
3,964.68
You can select one of the options to give the new column totals
Click on the arrow to bring up this menu
VISUALIZATIONS
FIELDS
Search
SalesReport
Area
Customer
CustomerGroup
Date_Invoiced
Date_Order_Accepted
DateDoc
Dispatch_Post_Code
Dispatch_State
Dispatch_Suburb
Inventory_Group
Inventory_Item
LeadsID
Values
OrderNo
Customer
Dispatch_Post_Code
Order_Amount_ExTax
Order_Amount_IncTax
TotalAmt
FILTERS
Visual level filters
Customer (All)
OrderNo (All)
TotalAmt (All)
Page level filters
Drag data fields here
Report level filters
Drag data fields here
DRILLTHROUGH
Remove field
Rename
Conditional formatting
Remove conditional formatting
Don't summarize
Sum
Average
Minimum
Maximum
Count (Distinct)
Count
Standard deviation
Variance
Median
New quick measure
Show items with no data
New group

Power BI



You can visualize the report data by selecting one of these graphs

If you cant find what your looking for in the help documentation let us know!

We will point you in the right direction or get something added to the documentation for you.

Email: support@busoftware.com.au

Thank you

Any further questions please contact us at

support@buzsoftware.com.au