



QUICK START GUIDE 4: ANALYTICS

1. THE QUANTIFIRE FILE

Quantifire Analytics are contained in a file with the ending **.pbix**. This is the file format for reports in Microsoft's *Power BI* software.

You'll need *Power BI Desktop* running on your computer if you want to open **.pbix** files.

Important: The .pbix file gives access to the estimation data to whoever opens it. Quantifire users are responsible for controlling distribution of the.

Alternatively, PFP Specialists can create a web-based analytics report where access is based on the Microsoft account of each person. Contact PFP Specialists for more information (note this work is chargeable, and may require additional Microsoft licenses).

2. DOWNLOADING AND INSTALLING POWER BI DESKTOP

There are two ways to install Power Bi Desktop: from Microsoft's website, or the Microsoft Store on your Windows 10 PC.

Note: Both methods of installation may need administrator permissions. If you have any trouble following the instructions below, contact your IT department.

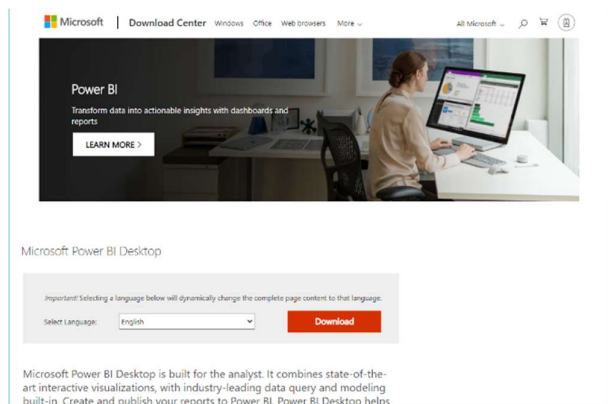
First steps: Find out whether your PC is 32-bit or 64-bit

Select the Start  button, then select Settings  > System  > About .

Under Device specifications, see System type. This should make it clear whether you are running a 32-bit or 64-bit version of Windows.

Download and install from the Microsoft website (recommended)

Visit <https://www.microsoft.com/en-us/download/details.aspx?id=58494>



Click the red **Download** button. A popup will appear asking whether you want the 32-bit or the 64-bit version.

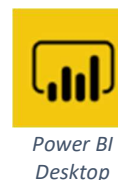
Tick the box to the left of the option which applies to you (the second option is for 32-bit PCs).

Now click the 'Next' button and the download will start.

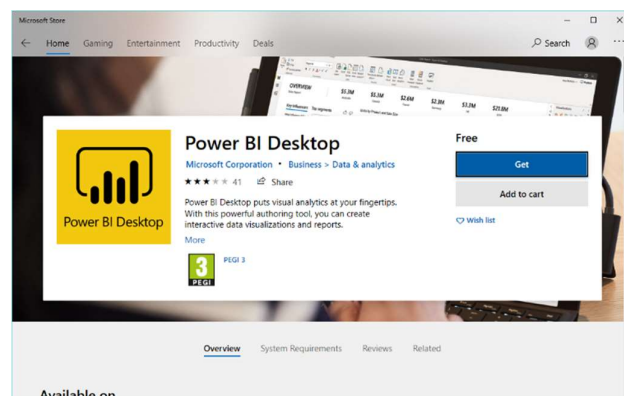
The file is large (nearly 300MB) so may take some time to download. To


install the software, double click on the downloaded file and follow the instructions.

Power BI Desktop will then be available in your start menu, and via an icon on the desktop if you accepted that option during the install process.

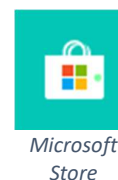


Install from the Microsoft Store



Open the Microsoft Store on your PC (from the Start  button) and search for 'Power BI Desktop'.

There are two Power BI apps in the store, so make sure to choose the one ending in 'Desktop'.



Click the blue **Get** button. If the store asks you to sign in you can click 'No, thanks' and the installation will

continue.

When the process is complete, Power BI Desktop will be in your Start menu.

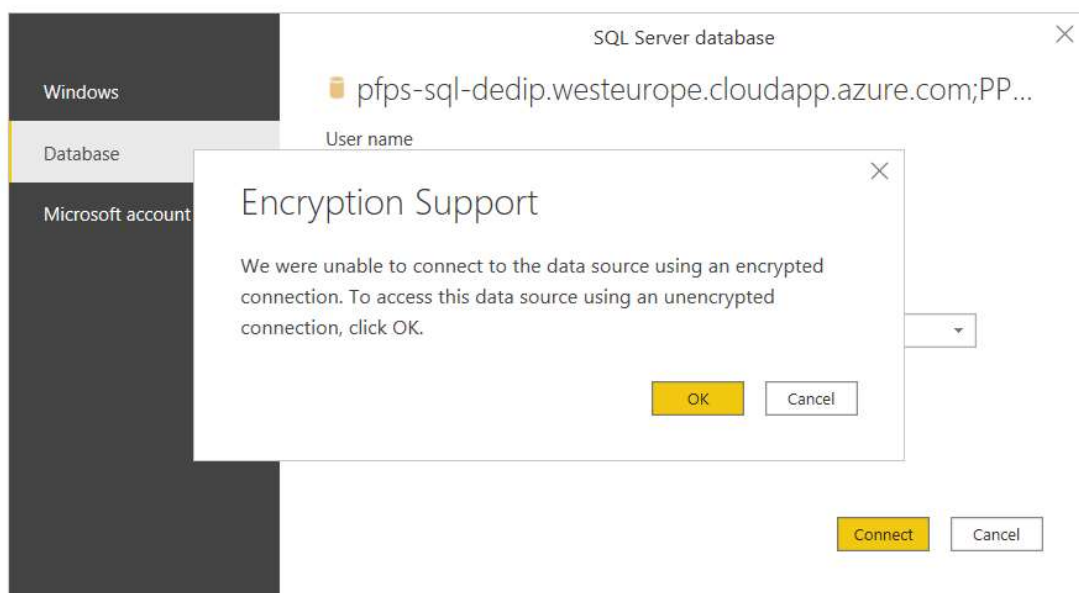
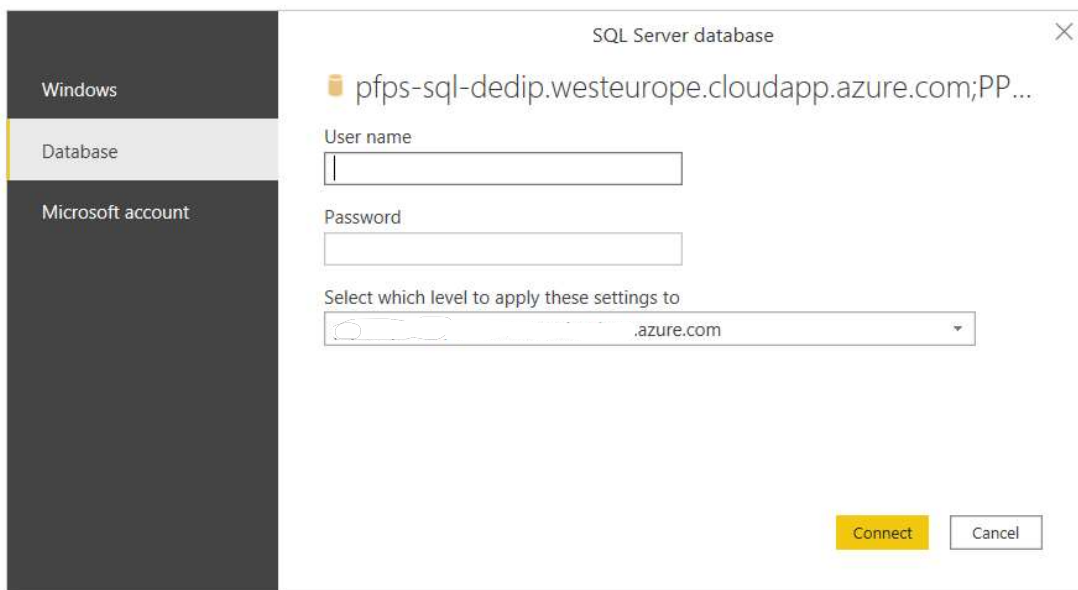
3. EXPLORING THE .PBIX FILE AND THE POWER BI REPORT

Now that Power BI Desktop is installed, you can save the .pbix file to your computer if you haven't already, and double-click on it. The file will open in Power BI Desktop automatically.

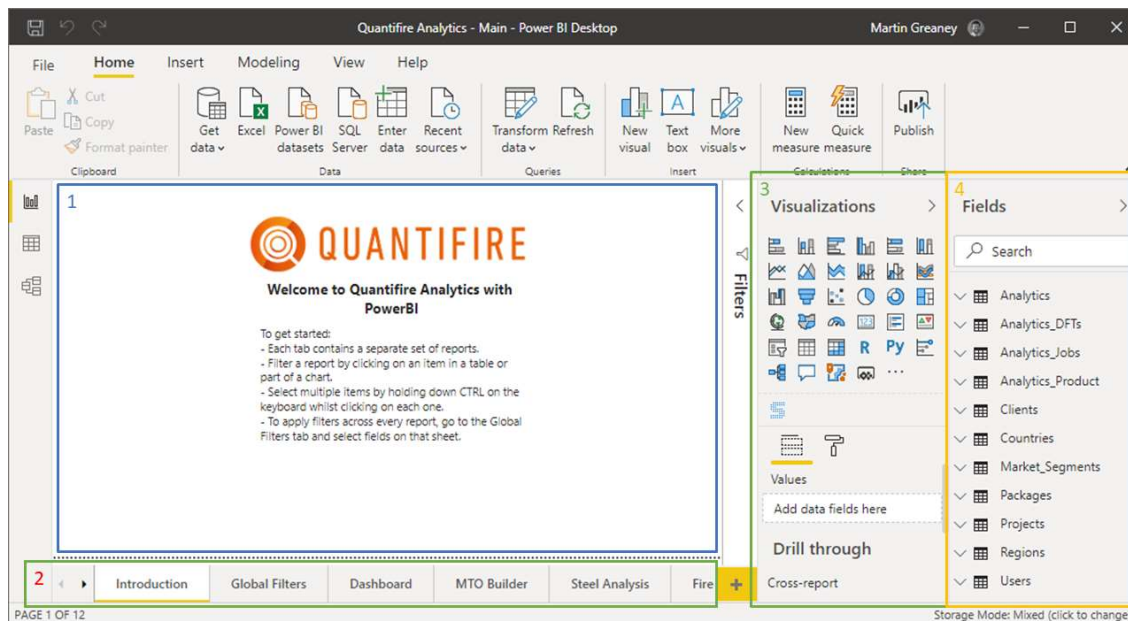
Note: if you open Power BI from the start menu (instead of by double-clicking the PBIX file) then you will be asked to sign into a Microsoft account.

If this happens to you, close Power BI and double click on the PBIX file.

The first time you open your .pbix you'll need to enter a username and password for the database (see the screenshots below). These will be provided separately. Once you've entered the login details and clicked 'Connect' you'll be shown a message about 'Encryption support'. Just click 'OK' and the report will carry on loading.



After the report has finished loading you will see the following screen. The numbered annotations highlight the important aspects.



1. **Main window:** here is where you'll see the data, consisting of graphs, tables and other visualisations.
2. **Tabs:** The report is made up of multiple tabs. Each tab contains a different collection of data, with the tab name reflecting the category.
3. **Visualisations dock:** you can ignore much of what is here until you are experienced in using powerBI. The important part comes below the word 'Values', which shows the names of the database fields used in a graph or table once you have clicked on it.
4. **Fields dock:** again, this can usually be ignored, but shows (with a tick in a yellow circle) which data has been used in the currently selected graph or table.

You can generally ignore the other elements on screen unless you have a specific task, as all your interaction will take place inside the main window.

Tabs: categorising the data

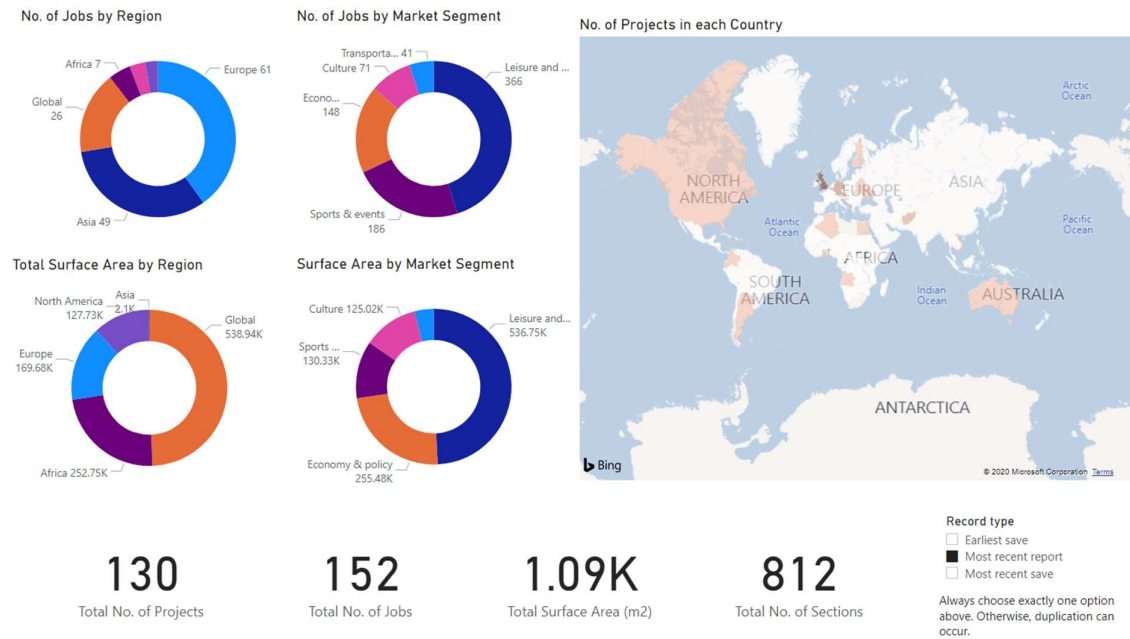
The first three tabs are worth describing in detail:

- *Introduction:* summarises how to interact with the graphs and tables in the other tabs.
- *Global filters:* displays lists by which you can filter all the data on all the other tabs (see example below).
- *Dashboard:* shows summary data taking in all your projects in the Quantifire system, subject to the filtering as described above. We'll use this to demonstrate interacting with the data below.

Main Window: interacting with the data

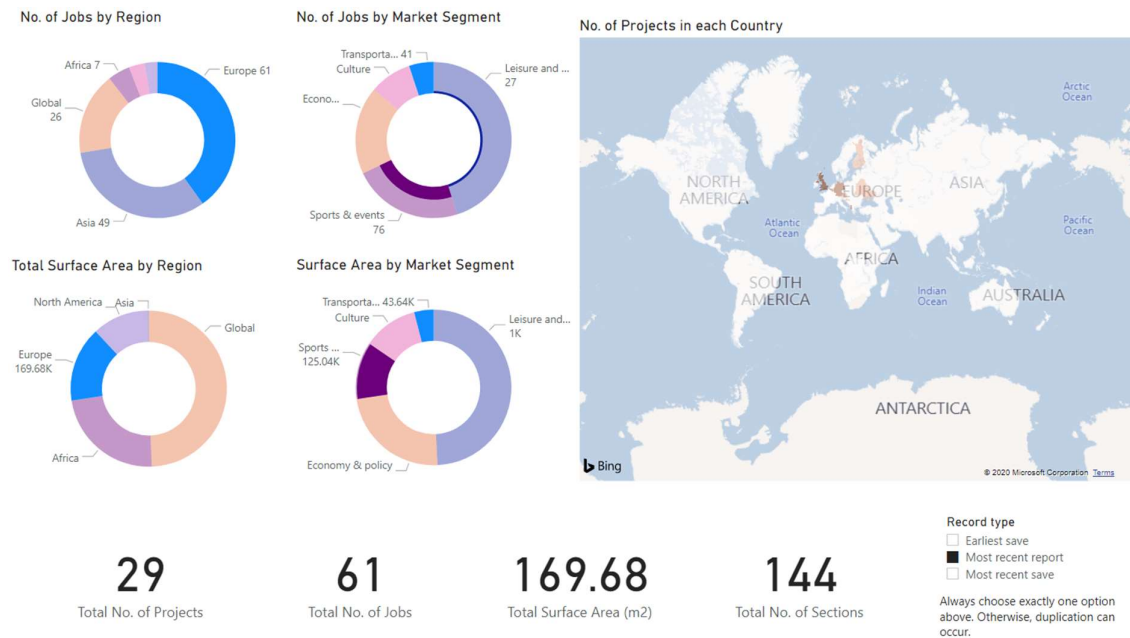
In this walk-through we are looking at the Dashboard tab, but the approach applies to every element of the Main Window.

The Dashboard: filtering by clicking on graphs



Above: The Dashboard tab, no selection applied

Taking the top left 'donut' chart as an example, if we click on once of the segments, such as 'Europe', all other segments are partly greyed out. In addition, every other visualisation on this page has the non-Europe parts greyed out too.



Above: The Dashboard tab, filtered by 'Europe'

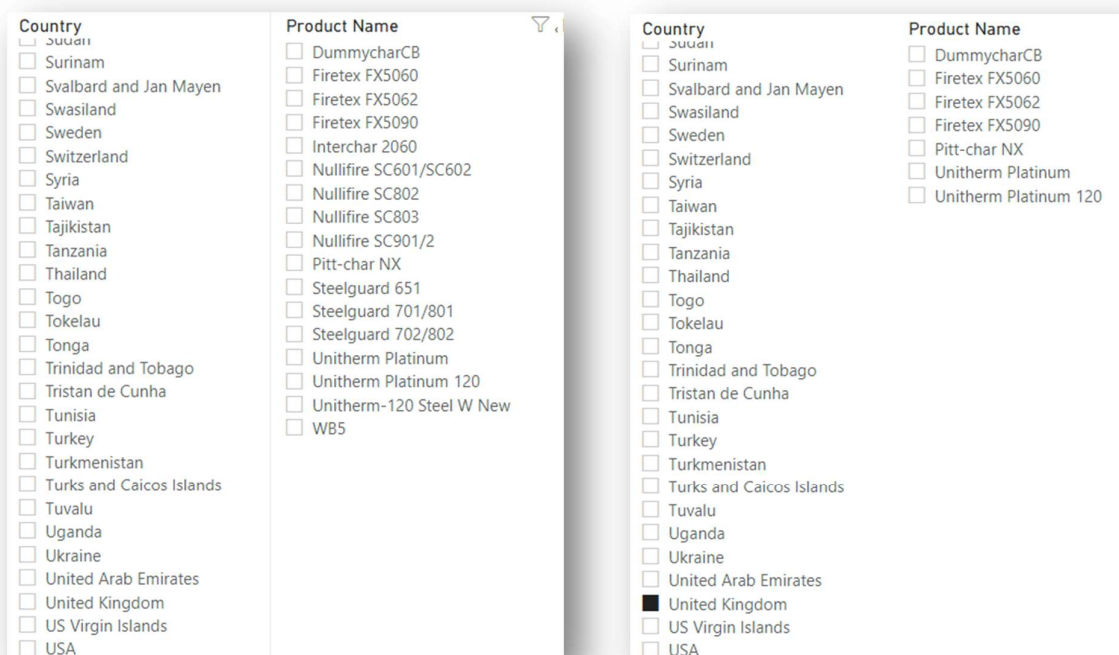
Note, for example, how on the second chart, 'Sports & events', highlights just 76 out of the total 186 jobs. The numerical counts along the bottom row have also reduced to reflect only European jobs.

This type of selection – clicking on a graph – lasts only as long as this tab is visible. If we move to another tab then the selection, and therefore the filter, is cleared.

To clear the filter manually, click on the same segment again, in this case ‘Europe’, or click on another segment altogether.

Global Filters: filtering by list selections

The lists you see on the Global Filters tab and elsewhere in the report are different. When you make a selection here, these filters remain ‘on’ until you change them or close the report (without saving).



In this extract (above left) from the ‘Global Filters’ tab, none of the ‘Country’ entries is selected, and so all are counted in the analysis.

In the second image (above right), the United Kingdom is selected, so only data produced by tests in the UK are included. You’ll see that the ‘Product Name’ table is reduced to show only products which were used in UK tests.

Narrowing down data by using multiple filters

Having selected a country, you could now select an item in the Product Name list to further narrow down your data.

For example, if you selected ‘Unitherm Platinum’ and ‘Pitt-char NX’ (by holding down CTRL while clicking) then the graphs and tables on all other tabs would only show data related to these two products, on tests conducted in the UK.

All filters are independent, so any combination can be selected. For example, you don't have to select a Country in order to be able to select Product Names.

Note about 'Record type' (found on the Global Filters and Dashboard tabs):

All your jobs in Quantifire can be saved multiple times, and Quantifire remembers every version. This filter lets you display only most recent, or the earliest, or the most recent where a report was generated.

Therefore, you should always select exactly one (no more nor less) on this filter, otherwise jobs will be counted multiple times.

Questions? Please contact us at PFP Specialists.