

MASTERING SLICER SYNCING IN POWER BI: ENHANCE YOUR DATA ANALYSIS

Swipe →

What are the Advantages of Synchronizing Slicers in Power BI?

1. Consistency Across Reports

Synchronizing slicers in Power BI ensures that when a user applies a filter on one page, the same filtering is automatically applied to all other pages or reports where the slicer is synced. This uniform filtering mechanism is pivotal for maintaining consistency in data analysis across a report. It prevents discrepancies from manually setting slicers on different pages and ensures that all viewers base their insights on the same subset of data. This is especially beneficial in collaborative environments, where multiple stakeholders rely on the same reports for decision-making.

2. Time Efficiency

Syncing slicers dramatically saves report creators and end-users time by manually eliminating the need to replicate slicer settings on each report page. This feature streamlines adjusting report views to focus on specific data segments. For example, suppose a user is interested in data for a particular region or product. In this scenario, they can select that region or product once, and the filter will automatically apply across the entire report. This efficiency allows users to focus more on analysis and less on navigating and setting up the report, leading to quicker insights and decisions.



3. Improved User Experience

Synchronized slicers enhance the user experience by making Power BI reports more straightforward to navigate and interact with. Users can seamlessly transition between pages or reports without repeatedly setting the same filters, which can be tedious and prone to errors. This smooth, intuitive interaction encourages more profound engagement with the report, as users can explore data without friction.

4. Enhanced Data Exploration


Syncing slicers fosters more dynamic and interconnected data exploration by allowing users to drill down into specifics while maintaining a holistic data view. For instance, users can select a particular time frame or category and instantly see how that selection impacts different aspects of the business across various report pages. This capability supports a more comprehensive analysis, as it facilitates the comparison of other data points and metrics under the same conditions. It encourages users to uncover hidden patterns, trends, and insights, making data exploration a more enriching and productive experience.

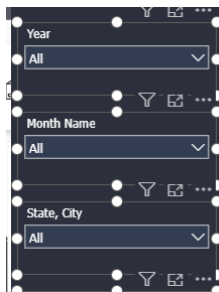
These advantages make synchronized slicers a powerful feature in Power BI, enhancing the efficiency, consistency, and depth of data analysis and reporting.


Basic Slicer Syncing in Power BI

Option 1: Copy and Paste

This method involves copying slicers from one report page and pasting them into another. When you paste the slicers into the new page, Power BI presents a pop-up asking if you want to sync these slicers with their counterparts on other pages. Choosing 'Sync' will automatically link the slicers across the pages, ensuring that any selection made in one slicer is reflected in all the synced slicers. This approach is beneficial if you have multiple slicers that you wish to synchronize across your report. It saves time and ensures consistency, making it an efficient way to manage slicer synchronization for complex reports.

- a. **Select Multiple Slicers:** Hold down CTRL and click the appropriate slicers you want to copy to other pages. Either use CTRL C or select the  icon from the ribbon to capture these slicers.



b. **Paste:** Use CTRL V or select the  paste slicers on the new page.

c. **Sync:** From the resulting pop-up window, select 'Sync'

Sync visuals



One or more of the copied visuals can stay in sync with the visual it was copied from. Do you want to keep them in sync?

Sync

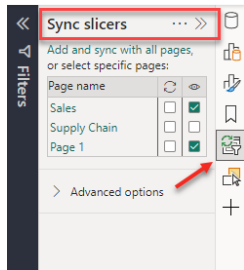
Don't sync



Option 2: Slicer Syncing via the Sync Slicers Pane

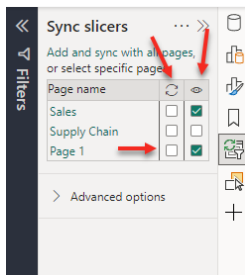
You can use the Sync Slicers pane to manually sync slicers across different pages in a report without using the copy-paste method. Here's how:

- Open the Sync Slicers Pane:** Go to the "View" tab in Power BI Desktop and click on 'Sync slicers' to open the sync slicers pane on the right side of your workspace.



- Select the Slicer:** Click on the slicer you want to sync across pages. This slicer should already be placed on one of the report pages.

- c. **Configure Syncing Options:** You'll see a list of all report pages in the Sync Slicers pane. Next to each page name are two checkboxes under the *Visible* and *Sync* icons.
- Visible:** Checking this box will make the slicer visible on the selected page(s).
 - Sync:** Checking this box will enable the slicer to control visuals on the selected page(s), even if they are not visible on those pages. This is crucial for syncing the slicer's functionality across pages.



- d. **Apply Sync Settings:** After configuring your slicer's visibility and activity options across the desired pages, the slicer selections will automatically synchronize across those pages.

This manual method provides more control over which slicers are synced, making it ideal for customizing the interactivity of complex reports. It allows for precise slicer visibility and functionality management, ensuring users can navigate the report seamlessly with synchronized filters across different reports.

Advanced Slicer Syncing: Unrelated and Disconnected Tables

Syncing slicers with unrelated or disconnected tables can be particularly challenging due to the lack of direct relationships that Power BI can automatically leverage for filtering. This situation often arises in scenarios involving date dimensions or composite models, where a report might include data from multiple tables that record events or transactions on different timelines. For example, one table might track sales transactions while another tracks delivery schedules, both keyed on different date fields. Without a direct relationship, standard slicer syncing would not allow a user to filter both tables simultaneously using a single date slicer.

To overcome this challenge, the Advanced slicer syncing feature can be employed to create a unified filtering experience across these disconnected tables. Here's how you can achieve this:

Syncing Separate Slicers in Power BI

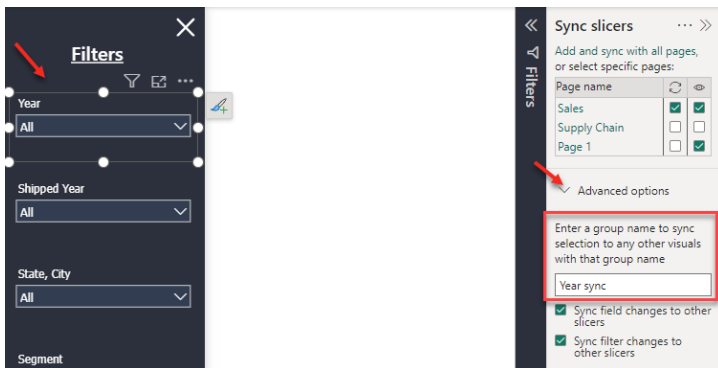
1. Make the Sync Slicers Pane Visible

- To start syncing separate slicers, the first step is to ensure that the Sync slicers pane is accessible.

**Refer to steps in Option 2 above.*

2. Grouping Slicers Using Advanced Options

- After making the Sync slicers pane visible, select one of the slicers you wish to sync. In the Sync slicers pane, you'll find the Advanced options section > click to expand this section.
- Enter a name for your slicer group in the designated box. This name can be anything but must be unique to the group of slicers you intend to sync.

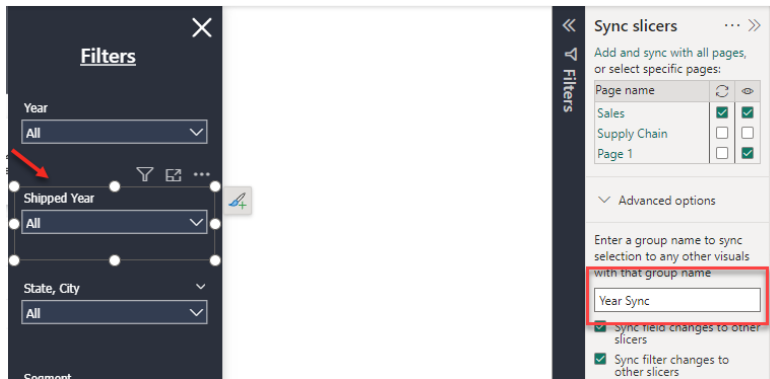


- Keep the sync field and filter slicer options checked.



3. Sync Additional Slicers by Group Name

- Next, select the other slicer you want to synchronize with the first slicer (this would be from your disconnected table or unrelated table in your model). In the Sync slicers pane under Advanced options, enter the same group name you used for the first slicer. The group name must match exactly across all slicers you wish to sync. Repeat this step for each slicer you want to include in the group.



4. Choose Synchronization Options

Power BI provides two primary options for slicer synchronization (default is both selected):

- **Sync filter changes to other slicers:** Select this option if you want the slicers to maintain synchronized filter selections. This ensures that any filter applied in one slicer is automatically applied to all slicers in the group.
- **Sync field changes to other slicers:** Choose this option if you want any changes made to the fields on which the slicers are based (such as changing the data field from one column to another) to be synchronized across the group. This option helps maintain consistent slicer configurations.

5. Testing Slicer Synchronization

- Finally, test the synchronization functionality by changing the selection in one of the slicers and observing the update across all slicers in the group. This step is essential to ensure the sync works as expected, keeping filters and field changes in sync across your report.

By following these steps, you can effectively sync slicers in Power BI, enabling consistent and unified filtering across different data sources or unrelated tables. This advanced syncing method enhances the interactivity and coherence of your reports, particularly in complex models where direct relationships between data sources are absent.

Additional Resources: <https://learn.microsoft.com/en-us/power-bi/visuals/power-bi-visualization-slicers?tabs=powerbi-desktop>

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