

Supercharge Power BI with Planning and Write-Back

**Analyze – Plan – Comment – Model
Collaborate – Predict – Write-Back
all in Microsoft Power BI**



 insightsoftware



Why Plan and Write-Back in Power BI?

- › Because analysis is for decision-making, not mere analysis
- › Because decision-making requires interaction with data and collaboration across groups: sales, finance, operations, etc.
- › Because data grows exponentially across systems, locations, teams, processes, and platforms
- › Because you want to capitalize on innovation (Power BI, ML, AI) and leverage existing investments, too (Excel, SQL, other databases, etc.)
- › Because timely, accurate, collaborative, scalable, secure data interaction is not negotiable

Visual Planner

With Power ON Visual Planner from insightsoftware, you can extend Power BI for analysis and beyond. Interact with data – plan, model, collaborate, and even predict. Build Custom Reports Based on GL Data. Edit values, add comments, collect input from others, and write-back in real-time, all while respecting system and role-based security.

Visuals & Capabilities

Data Entry Matrix	Drag and Drop	Visual Table Editor
Read, write, commentary	Adjust forecasts visually and easily	Add/delete, sort/filter, drill through
Line-Item Detail	Master Data Management	Predictions
details below the summary level	Manage data elements and structures	Incorporate AI and Machine Learning

Power ON Visual Planner Details

Data Entry Matrix

- Key in data, what-if scenarios, comments, etc., that write-back real-time
- Read/write in pivot tables
- Comment, annotate, or remark on any data point
- Smart formulas and goal-seek on DAX measures
- Statistical, operational, or financial metrics
- Actual, plan, and forecast data in the same matrix or view
- Immediate refresh across related visuals and data points
- Expense, revenue, sales, supply, demand, inventory, HR, etc.

Drag and Drop

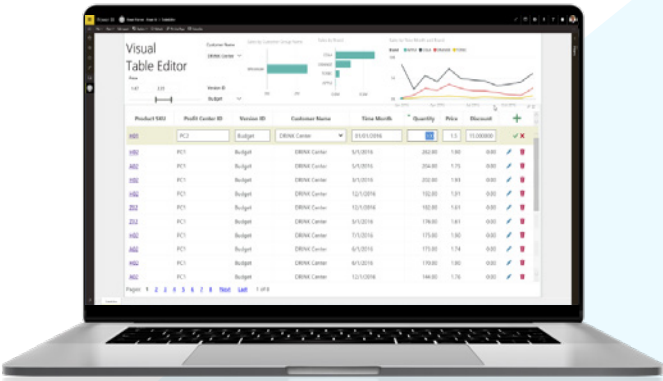
Make data entry, collection, and edits in Power BI visual and easy to use for all involved:

- Allows for drag-and-drop adjustments to line charts or bar charts via mouse or touchscreen
- Enables timely, effective what-if scenarios and updates at the touch of a finger

Visual Table Editor

Connect to any data source and edit values for products, customers, employees, calendars, etc.

Use	To
➤ Text and checkboxes	➤ Add, edit, delete rows
➤ Drop downs	➤ Sort/filter by any column
➤ Date picker	➤ Automated paging
➤ User ID tracking	➤ Drill through pop up



Line-Item Detail

- › Plan below the summary level, taking control to add underlying context and detail

Master Data Management (MDM)

- › Visual Table Editor enables MDM as a custom visual in Microsoft's Power BI
- › Add, delete, or modify any SQL table connected to Power BI through the Power BI Gateway
- › Supports Direct Query model for measures

Predictions

- › Machine learning forecast on ERP and other data
- › Predictive analytics modeling returns the data point from R script to Power BI

Data Sources:



Platforms:

Cloud | Hybrid | On-Premises | Report Server

“Power ON Visual Planner is one of the most interesting and effective forecasting tools our leadership has seen.”

–Travis Buckingham, Director of Finance & Accounting Data Strategy, Stewart

About insightsoftware

insightsoftware is a global provider of reporting, analytics, and performance management solutions. We enable the Office of the CFO to connect to and make sense of data. Over 32,000 organizations rely on our best-in-class solutions for increased productivity, visibility, accuracy, and compliance.

Learn more at insightsoftware.com.



US +1 919 872 7800

UK +44 (0) 845 467 4448

AU +61 2 8985 7777

insightsoftware.com